Blackbaud Financial Edge NXT Quick Start Guide

This Guide aims to assist legacy and new users with accessing and running existing reports in Blackbaud Financial Edge NXT, which is Tower Foundation's financial system. Colleges and Departments with donor funds typically have a contact who is familiar with the system and can help direct new users to existing financial reports. Please contact your Division Resource Officer or departmental Financial Manager for assistance.

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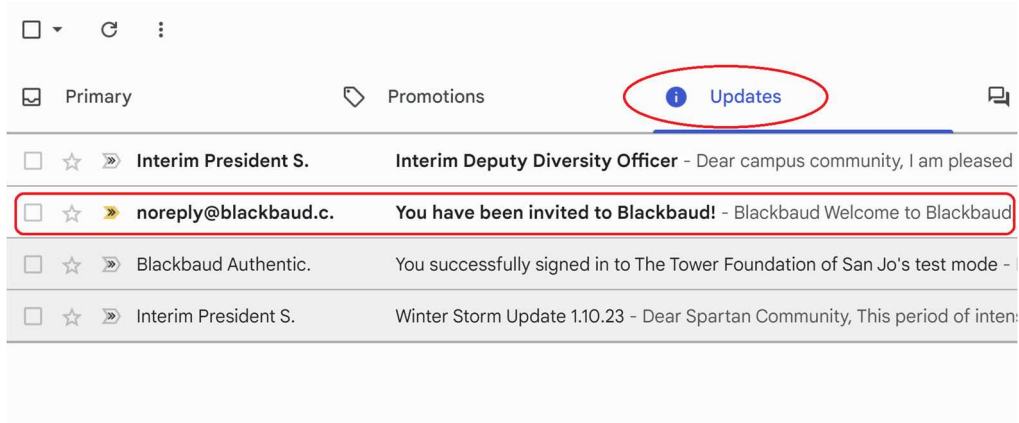
Initial Access

Financial Edge NXT Invitation Process

Look for an email from Blackbaud that contains your invitation to join Financial Edge NXT.

👉 **Please note: if your Gmail inbox includes the "Updates" tab, the invitation will appear there.**

🖱 Click on **Accept Invitation** to complete the enrollment process. If you are not already logged into one.sjsu.edu, you will be prompted to complete that process and authenticate via Duo**.**
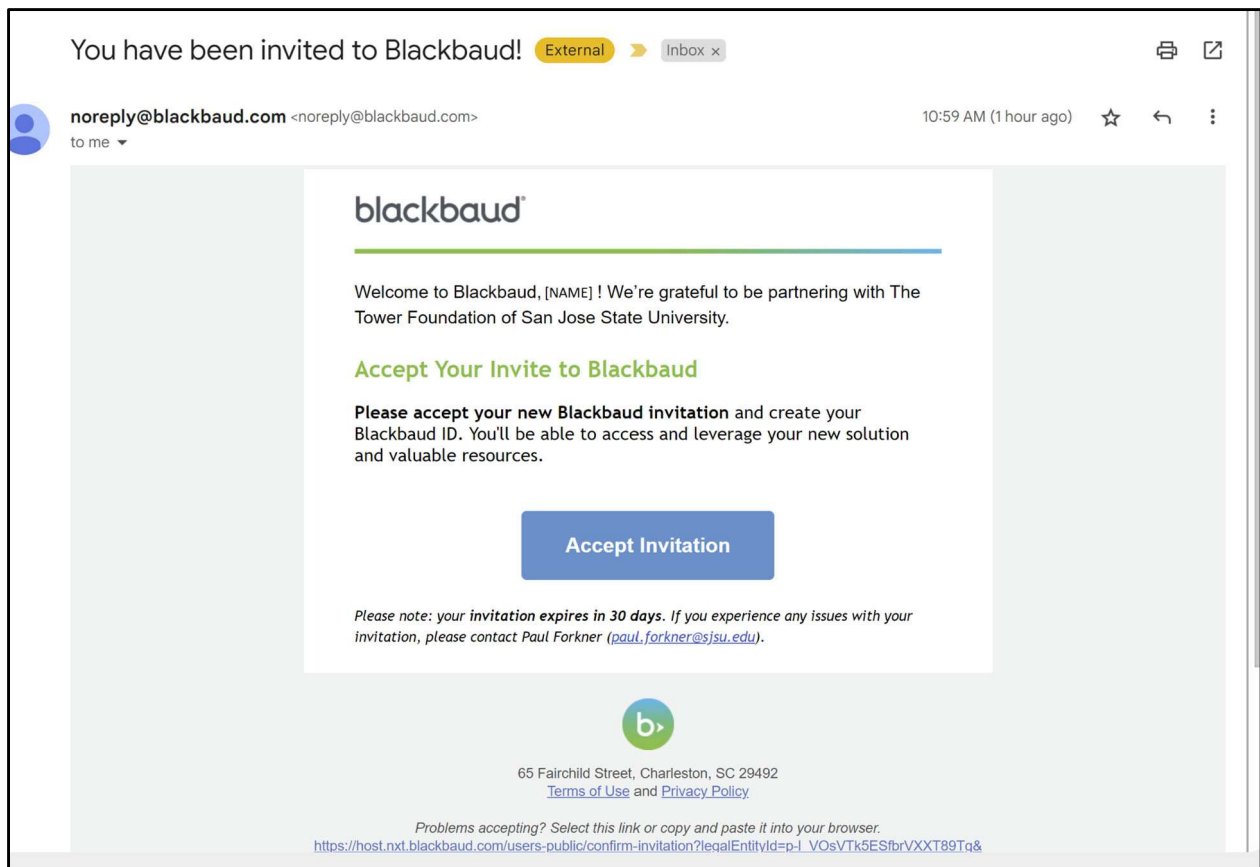
🖱 Click on the **Sign in with the Tower Foundation** button

You should arrive at the Blackboard Financial Edge NXT homescreen.

👉 **Bookmark this URL to return to Financial Edge NXT:**
https://host.nxt.blackbaud.com/fenxt-homepage/?envid=p-b76VAoZhu0mg6UNADPzm0w

Special Note for Legacy Users

If you had access to Blackbaud Financial Edge prior to January 1, 2023, your user experience should be the same once you are in the Financial Edge system. The login process has been integrated with One.sjsu.edu, so you can access Financial Edge without signing into it separately. Just navigate to [url] to access the system.

If you typically select "Database View" after logging into Financial Edge, you downloaded Citrix Workspace at some point. The newer web interface, or Web View, doesn't require the Citrix Workspace client and is the preferred method of interacting with the system going forward. When you login you are already in Web View. The guidelines below all describe how to use the Web View.

Accessing Reports

Departmental users login to the Financial Edge NXT system to access financial reports. This section describes the report access process, but does not discuss creating reports. Reports should only be created by a knowledgeable user to ensure they are accurate. Please contact your college Division Resource Officer, your departmental financial liaison or Tower Accounting (Thin Thandar Kyaw, 408-924-6517).

🖱 Click on **Reporting** in the Financial Edge NXT home screen.
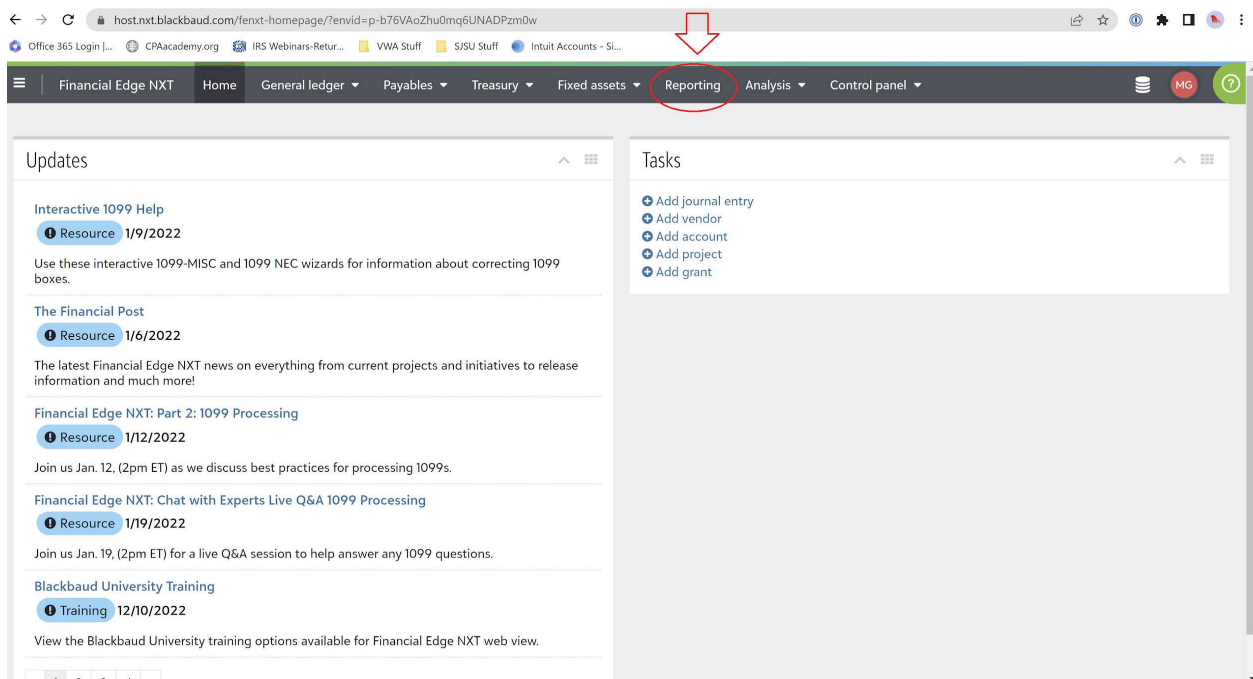
The Reporting home screen will open. The list of reports are hyperlinks. Clicking on a report name will open the report.

Finding Existing Reports

In this window, you can see the list of all reports created. The default sort is alphabetical by report name. Once a report has been created for you, perform a keyword search to find it and add it to your Favorites list (instructions follow).

⌨ Enter a keyword in the ***Find in this list*** box. The search will only include values in the **Report** column, so you cannot search on the **Tags** field.
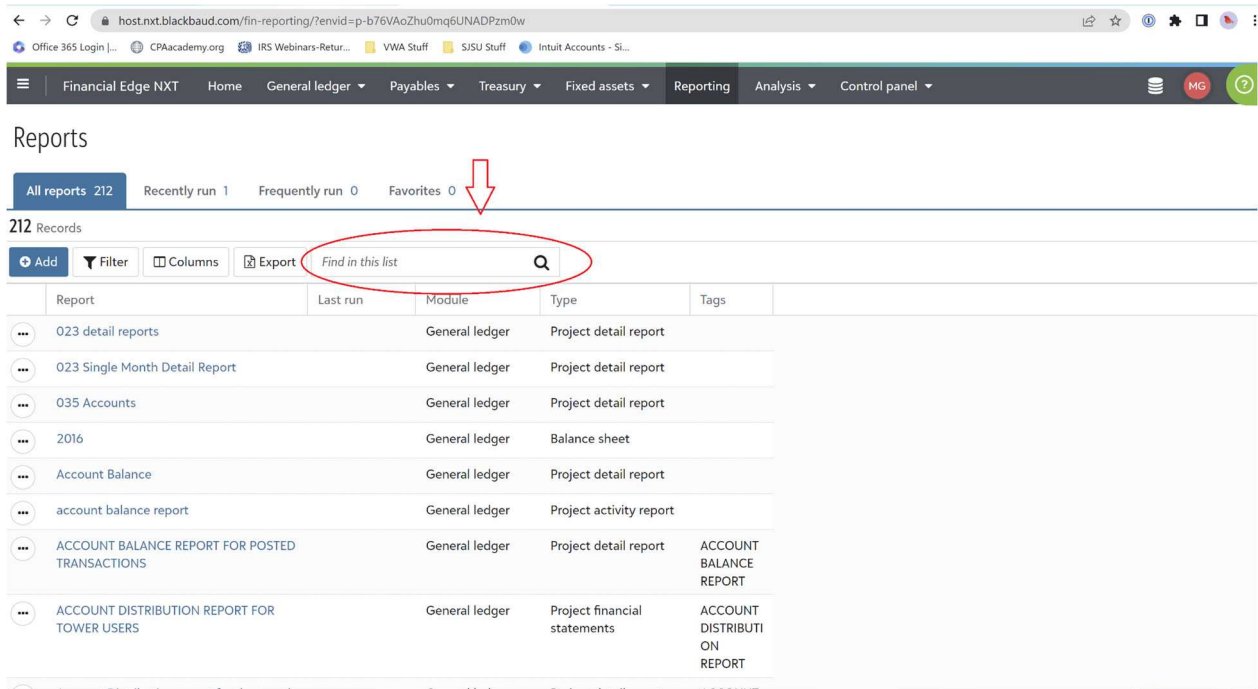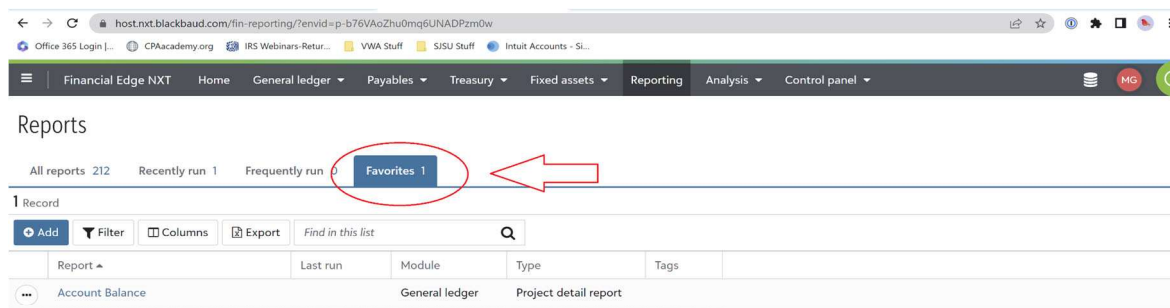
Adding a Report to the Favorites List for Easy Access

When you find your report(s), you can easily add them to a **Favorites** list.

🖑 Click on the ellipsis (...) to the left of the report you want to favorite. In the drop-down menu, select **Add to favorites.**
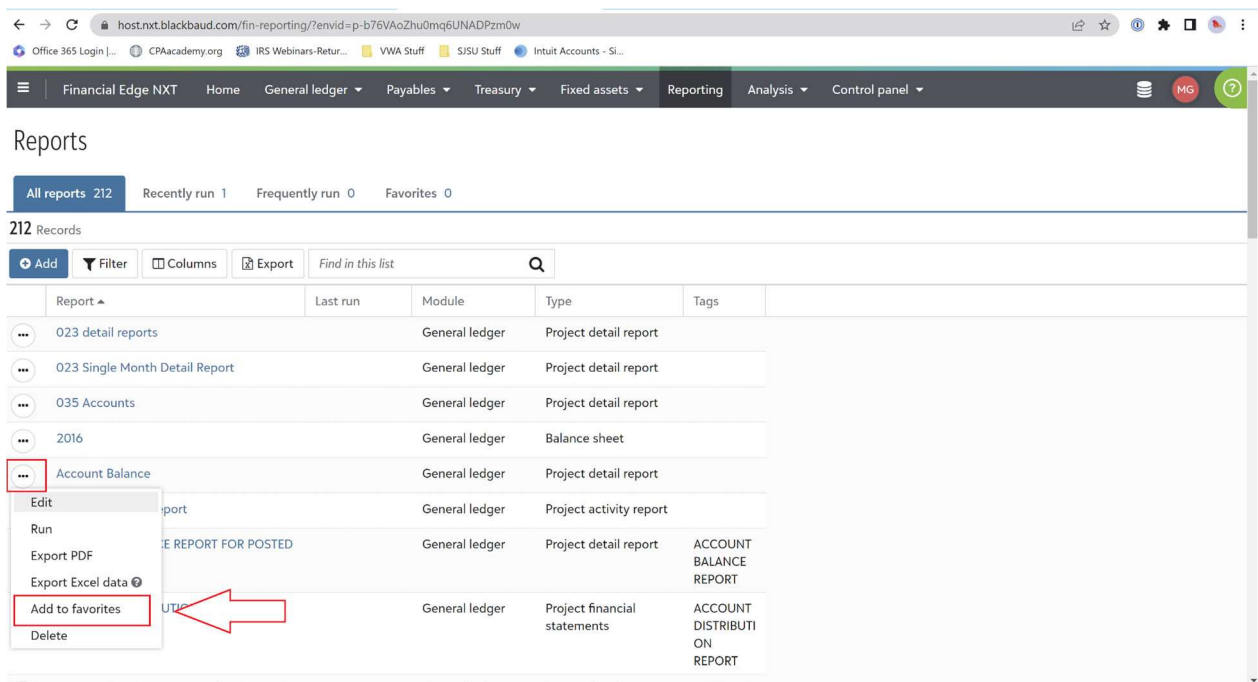
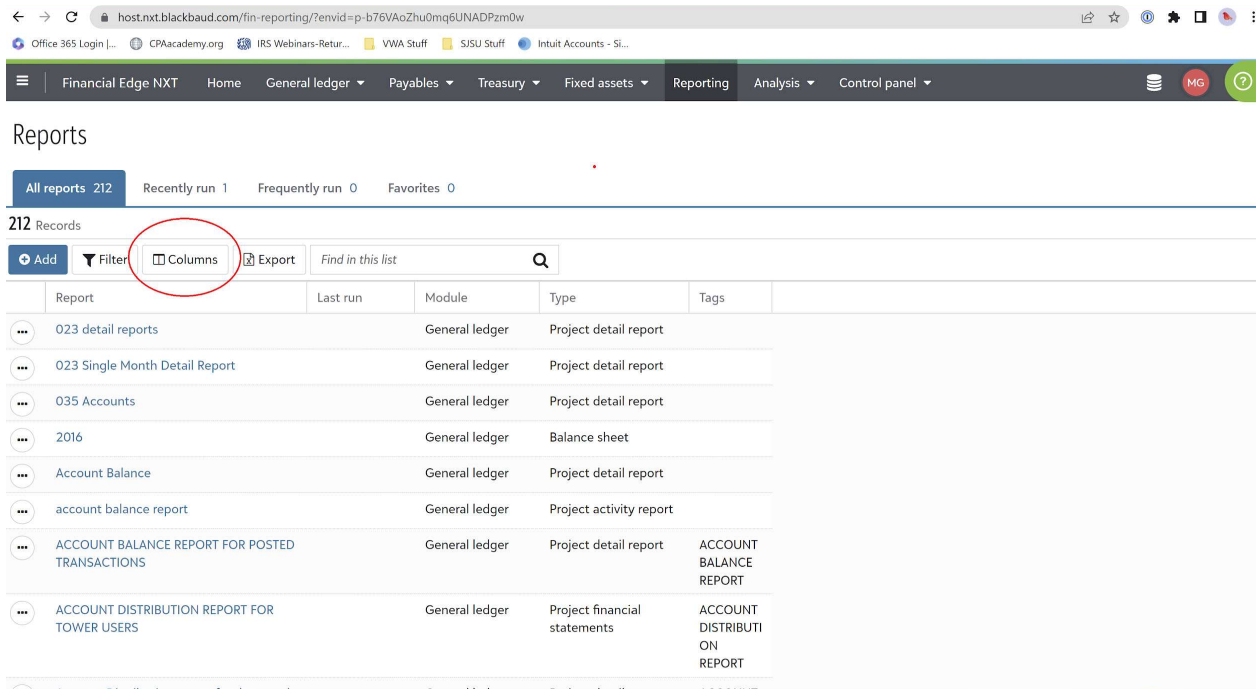🖰 Select the **Favorites** tab at the top of the screen to see only your favorite reports:
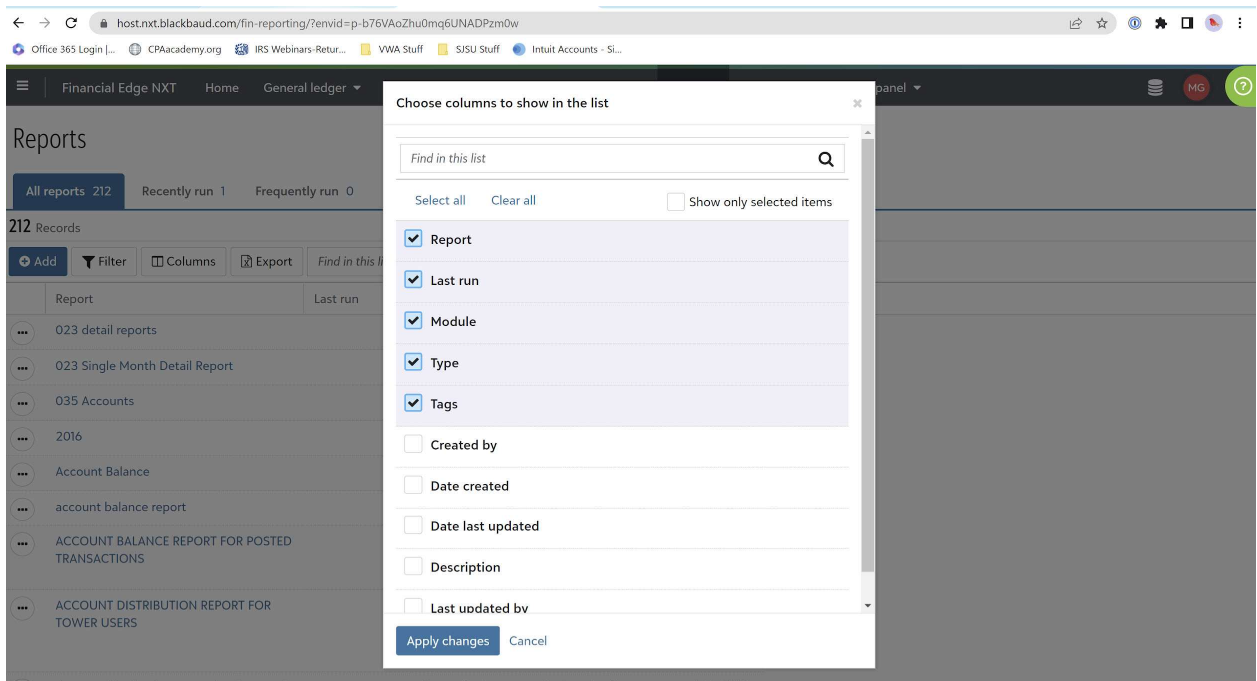

Advanced Tips for Finding Reports

Adding Additional Information to the Report Screen

You can add more columns to the Reports home screen to help find existing reports.
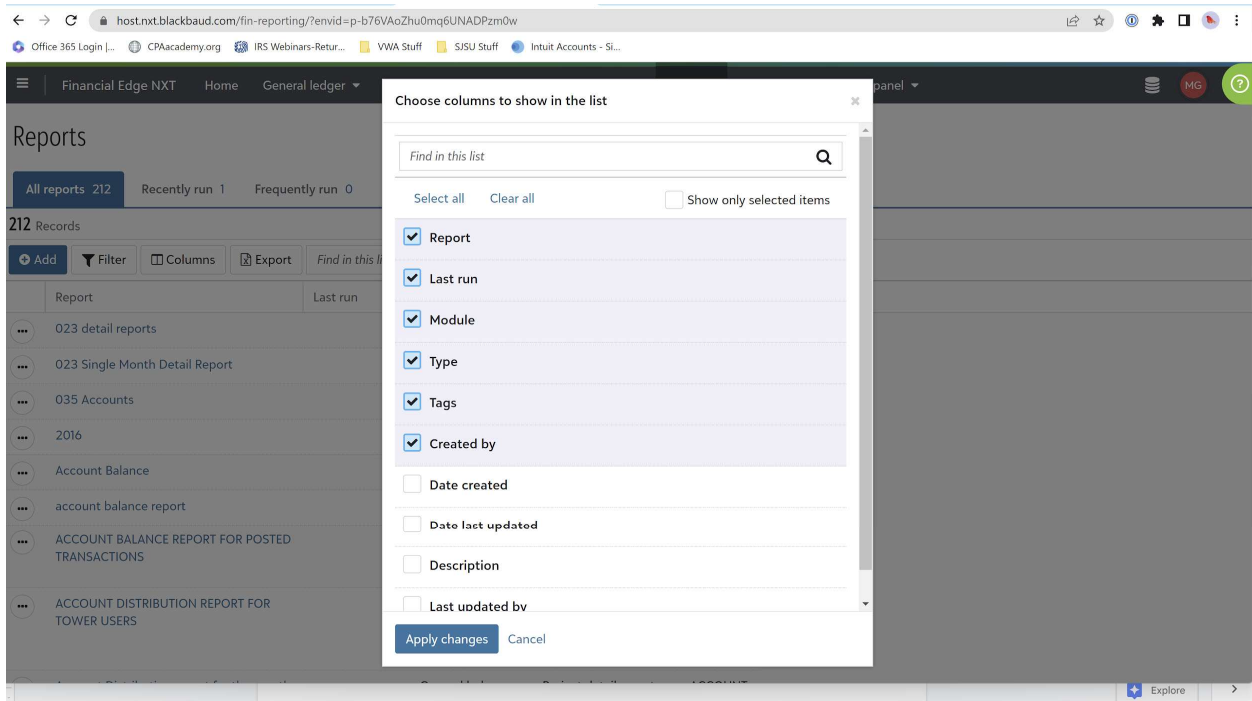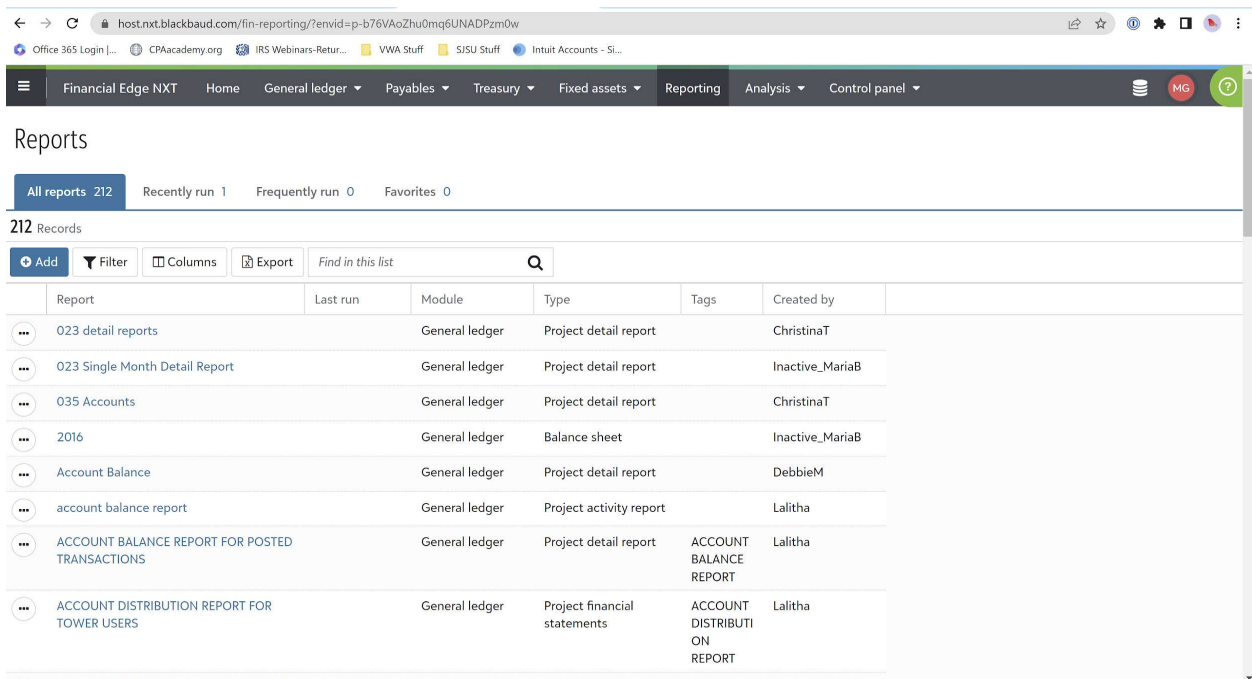
🖰 Click on **Columns**

This will open a window with additional options:

Select the columns you want to add. In this example, we will add the **Created by** column.

👆 Click on **Apply changes.** Now the Reports screen shows a new column at the end with the username of the report creator.
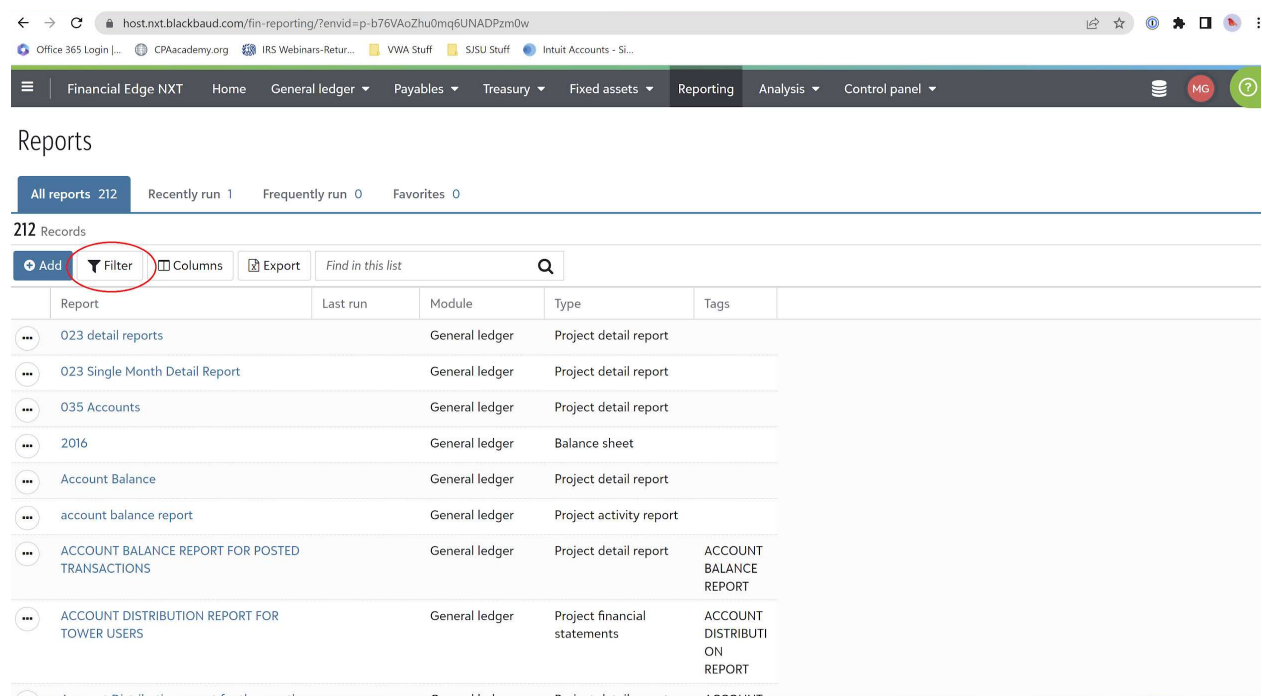
Sorting the Report Screen

🖰 Click on any of the headings in the Report screen to sort by that column. The first click will sort in ascending order. A second click will sort in descending order.

Filtering the Report Screen

The Report screen can be filtered to focus only on the types of reports you will access. The following steps will remove several reports used by Tower Foundation Accounting staff, which makes the list easier to navigate (i.e., shorter).

🖰 Click on **Filter**

☞ In **Module**, select *General Ledger*

In **Type**, select *Project financial statements*

🖱 Click on **Apply Filters**

Now the Reports screen shows a subset of total reports. The filters applied are shown above the column headings.

Reports

| All reports 19 | Recently run 0 | Frequently run 0 | Favorites 0 |

19 Records

Add | Filter | Columns | Export | Find in this list

Filter: Module is General ledger ✖ | Type is Project financial statements ✖

	Report ▲	Last run	Module	Type	Tags	Created by	
⋯	ACCOUNT DISTRIBUTION REPORT FOR TOWER USERS		General ledger	Project financial statements	ACCOUNT DISTRIBUTION REPORT	Lalitha	
⋯	Art ACCOUNT DISTRIBUTION REPORT FOR TOWER USERS		General ledger	Project financial statements		DebbieM	
⋯	Athl Distribution		General ledger	Project financial statements		JeffP	
⋯	Athl Distribution JP		General ledger	Project financial statements		JeffP	
⋯	Athl SIF Accounts JP		General ledger	Project financial statements		JeffP	
⋯	CoE ACCOUNT DISTRIBUTION REPORT FOR TOWER USERS		General ledger	Project financial statements		KarenT	
⋯	Deb		General ledger	Project financial statements		DebbieM	