Helpful Hints

1. Browser preference:
   a. Edge or Firefox. It will run faster without the potential loading errors

2. Which report is useful for:
   a. Find a transaction for a specific date – Revenue & Expense Transaction
   b. Balance in a Department/Speedtype – Budget to Actual Reporting
   c. Balance of a faculty's research account – All Funds Fund Balance Report

3. Color difference of numbers:
   a. The blue numbers are clickable links, that will open in a new tab showing the detail that makes up that number

4. Patience is important with EBI:
   a. Remember to look for the status light next to the Sign Out button.

Helpful Hints

5. How to interpret parenthesis:
    a. Budget to Actual – Remember that this report is budget (+) minus total charges plus or minus transfers
        - If the balance is overall positive, it means there are funds available
        - If the balance is overall negative, that _potentially_ means an overspend
        - Transfers in (i.e., additional funds into the department/ST) will show a negative because it offsets spending
        - Transfer out is the opposite, a reduction of funds in the department/ST
        - Returns/Refunds will be shown in parenthesis so that it zeros out the original transaction

    b. All Funds – Remember that this report is revenue (-) plus total charges (+) plus or minus transfers
        - If the overall balance is negative, that means there are funds available
        - If the overall balance is positive, that _potentially_ means an overspend
        - Transfers in (i.e., additional funds into the project/ST) will show a negative because it is an increase in funds
        - Transfers out is the opposite, a reduction of funds in the project/ST
        - Returns/Refunds will be shown in parenthesis so that it zeros out the original transaction

    c. Revenue & Expense – Best answer is it depends
        - Revenue is shown with parenthesis
        - Expenses are shown without parenthsis
        - Transfers in (i.e., additional funds into the department/ST) will show a negative because it offsets spending
        - Transfers out is the opposite, a reduction of funds in the department/ST
        - Returns/Refunds will be shown in parenthesis so that it zeros out the original transaction