Self-Service Financial Management
Directions for Filtering Criteria

- Log into Self-Service via CONNECT2U. Click on Self Service Icon.

- Click on Financial Management.

  Financial Management
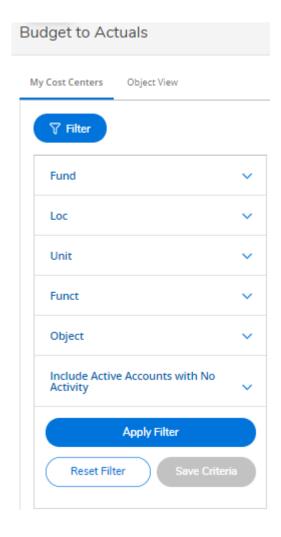 Here you can view the financial health of your cost centers and your projects.
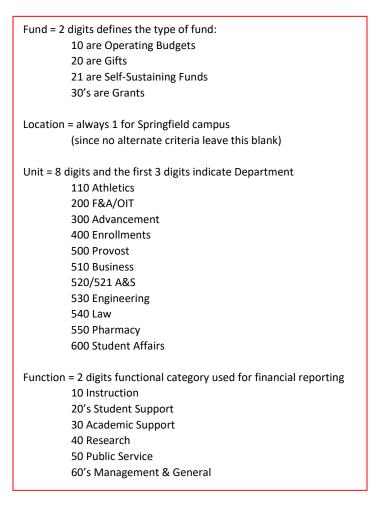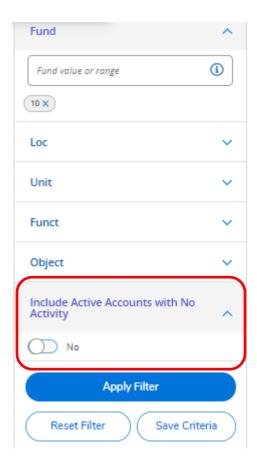
- Click on Budget to Actuals.

  Budget to Actuals
  Here you can view the financial health of your cost centers.

- Select the "My Cost Centers" option.

Budget to Actuals

My Cost Centers | Object View

Filter

Fund
Loc
Unit
Funct
Object
Include Active Accounts with No Activity

Apply Filter
Reset Filter | Save Criteria

Fund = 2 digits defines the type of fund:
    10 are Operating Budgets
    20 are Gifts
    21 are Self-Sustaining Funds
    30's are Grants

Location = always 1 for Springfield campus
    (since no alternate criteria leave this blank)

Unit = 8 digits and the first 3 digits indicate Department
    110 Athletics
    200 F&A/OIT
    300 Advancement
    400 Enrollments
    500 Provost
    510 Business
    520/521 A&S
    530 Engineering
    540 Law
    550 Pharmacy
    600 Student Affairs

Function = 2 digits functional category used for financial reporting
    10 Instruction
    20's Student Support
    30 Academic Support
    40 Research
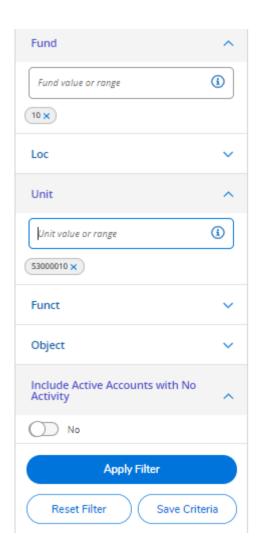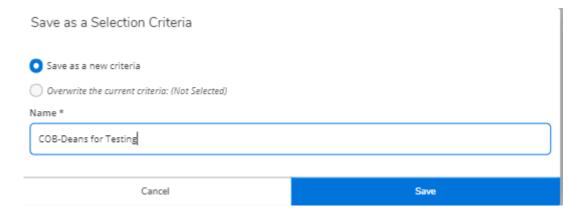   50 Public Service
    60's Management & General

- Click on Fund and the box will appear where you can enter data. This example will highlight the Operational Budget, so type "10" and Enter.
- Include Active Accounts with No Activity provides you the Yes/No option. If "No" is indicated then you won't see accounts that have no budgets and no actuals.

- Click Apply Filter whenever you want to see the data.

- The following example shows College of Engineering and under Unit when you enter 53000010 the Dean's business unit detail will show when you click on Apply Filter .

- Click Save Criteria and name as you would like. This will only be available to you. Click Save

- The saved name will now appear under the Saved Selection Criteria. You can create multiple criteria that will allow you to view different options. Just remember to click the blue "X" to remove the filter and continue.
- If you work with Grants it may be efficient to create a view for each Grant that you manage.

Filter

Fund: 10   Unit: 53000010   Hiding active accounts w/ no activity

Saved Selection Criteria	Cost Center
COE-Deans Office ⌄	53000010 UNR-OPERATING FUND : COLL OF ENG DEAN'S OFFICE
Set Default Criteria	53000010 UNR-OPERATING FUND : COLL OF ENG DEAN'S OFFICE

53000010 ✕