

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.

The screenshot shows a filter interface for 'Fund'. At the top, there is a search box labeled 'Fund value or range' with an information icon. Below it is a '10 X' button. The interface has several dropdown menus: 'Loc', 'Unit', 'Funct', and 'Object'. A red box highlights the 'Include Active Accounts with No Activity' section, which contains a toggle switch currently set to 'No'. Below the filter options are three buttons: 'Apply Filter', 'Reset Filter', and 'Save Criteria'.

- 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 .

Fund ^

Fund value or range ⓘ

10 x

Loc v

Unit ^

Unit value or range ⓘ

53000010 x

Funct v

Object v

Include Active Accounts with No Activity ^

No

Apply Filter

Reset Filter **Save Criteria**

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

Save as a Selection Criteria

Save as a new criteria

Overwrite the current criteria: (Not Selected)

Name *

COB-Deans for Testing

Cancel **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

COE-Deans Office ▼

Set Default Criteria

Cost Center

53000010 UNR-OPERATING FUND : COLL OF ENG DEAN'S OFFICE
53000010 UNR-OPERATING FUND : COLL OF ENG DEAN'S OFFICE

53000010 ✕