

Login to Self Service

Open any web browser and go to www.washjeff.edu

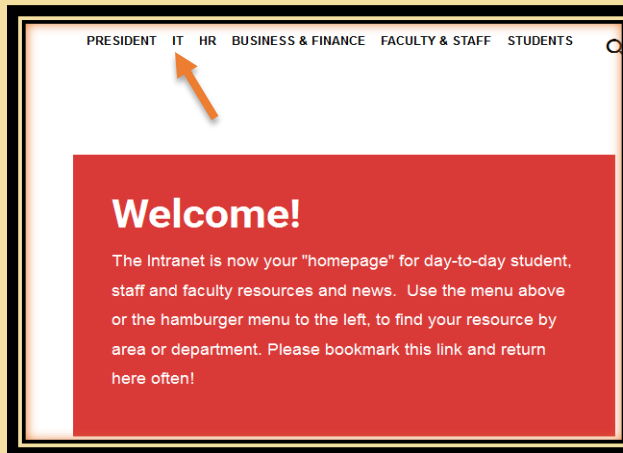
Click on "INTRANET".



Sign-in to Washington and Jefferson College resources by using your @washjeff.edu email address and password.



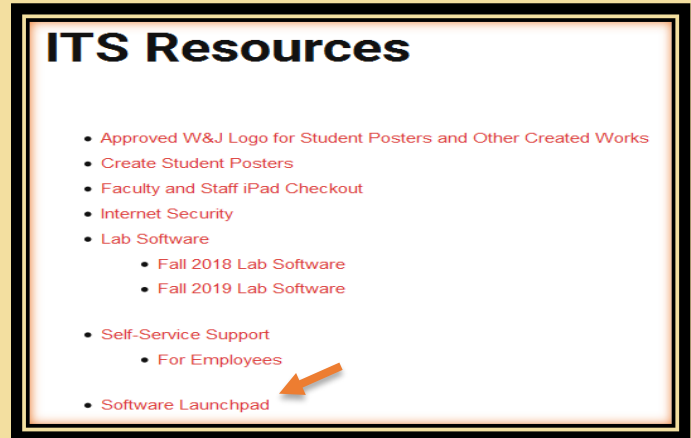
Click on "IT"



Click on "Resources"



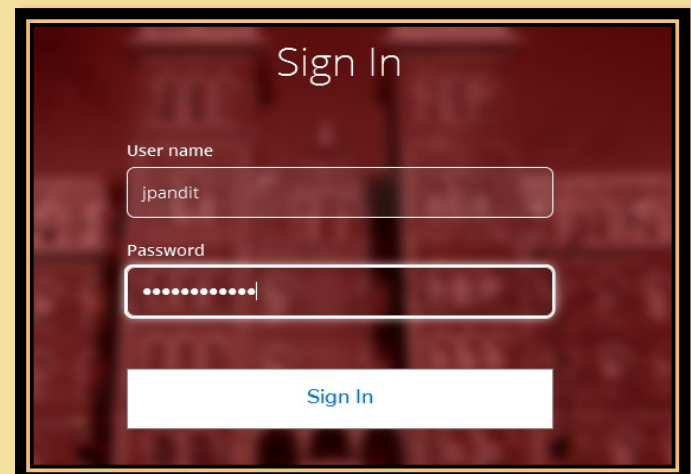
Click on "Software Launchpad".



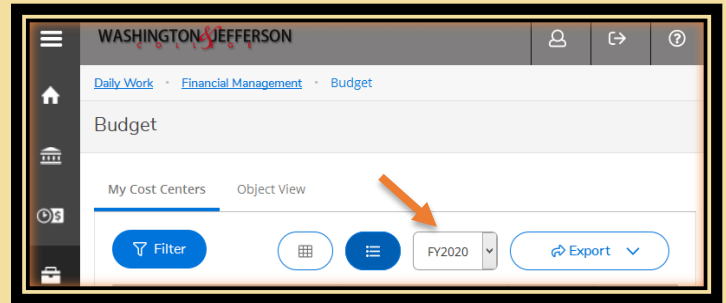
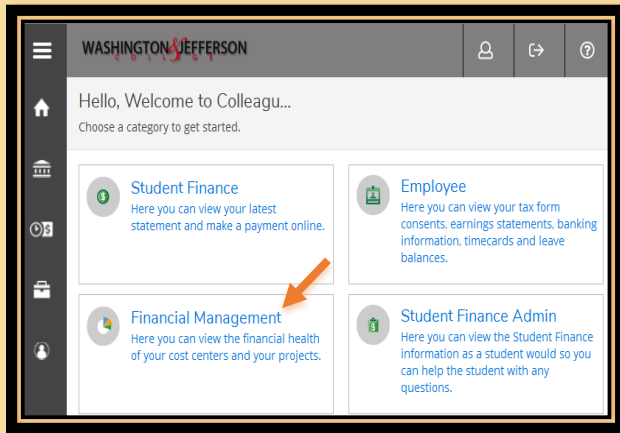
Click on "Self Service - Production"



Sign in to Self Service with the same **User Name** and **Password** that you use for other campus systems.



Once in Self-Service, select the **“Financial Management”** by clicking on it as shown below:



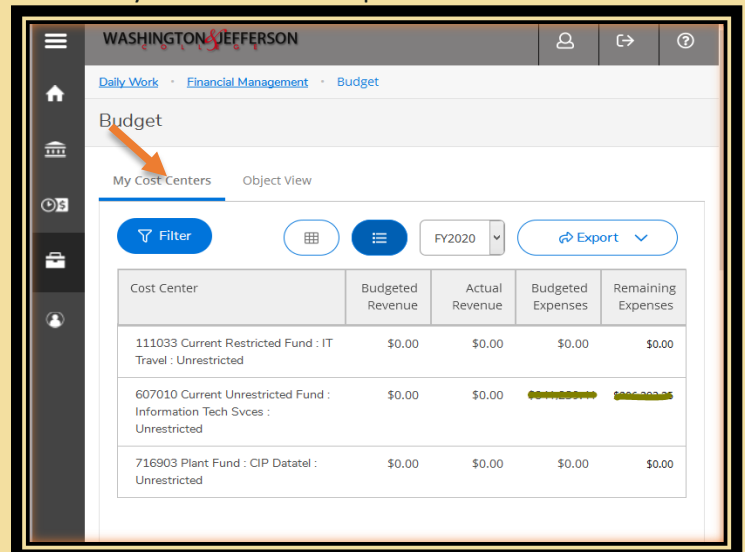
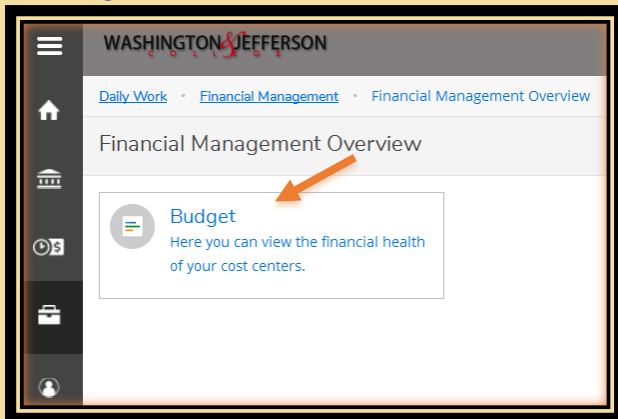
After selecting “Budgets” and “FY...”, you will see a listing of **“My Cost Centers”** based on those GL accounts you have been given access to view.

There are multiple ways to view the information in Budget Self-Service.

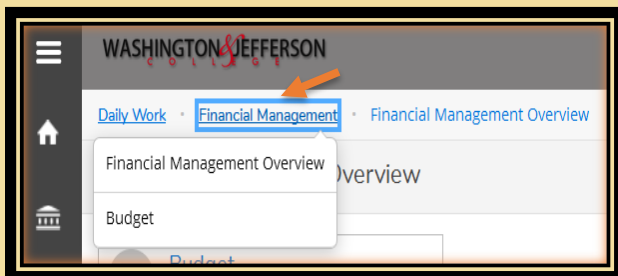
My Cost Centers

The My Cost Centers view will list the accounts you have access to by Cost Center or Department.

After selecting "Financial Management" click on **"Budget"**



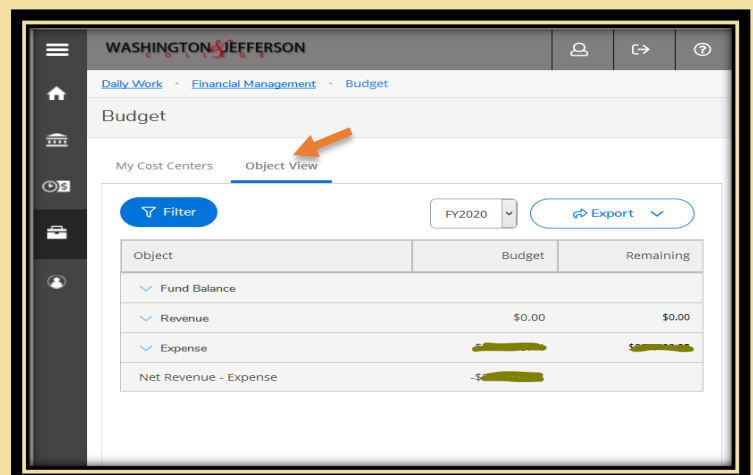
You can also select Budgets from the dropdown menu list under **“Financial Management”** at the top of the window.



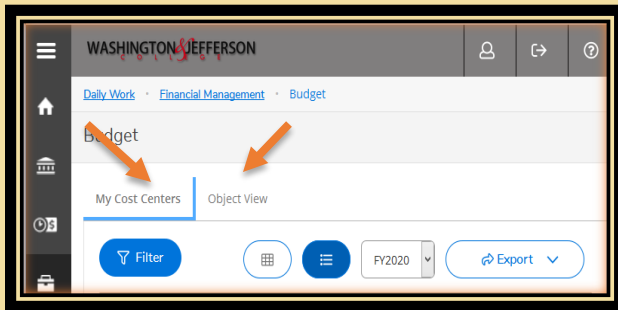
Object View

The Object View tab will first show the break down by Object Category. It will display your assets, liabilities, fund balances, revenue, and expenses.

Before reviewing budgets or financial activity make sure you have selected **“FY...”** in self-service in the upper right section of the window.



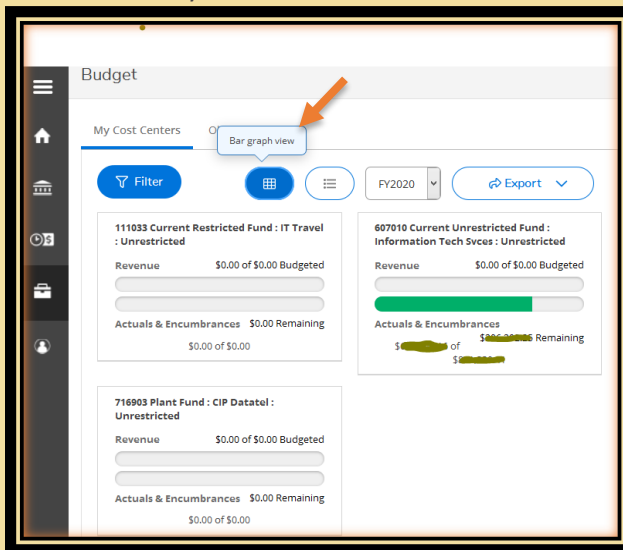
You can toggle between "My Cost Center" and "Object View" by selecting the appropriate tab in the upper left hand side of the window.



Two different views within My Cost Center:

Bar Graph View

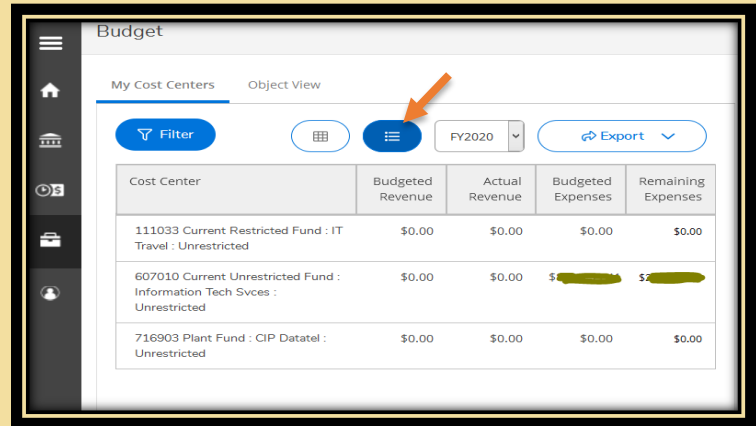
The Bar Graph View will show the total budget for each Cost Center, the amount spent and its color coded Health. After clicking into a Cost Center under Bar Graph View, it will revert to List View for any additional details



List View.

Shows the status of each department plus a Financial Health indicator:

- Green Check Mark: Below Budget
 - Yellow Caution Sign: Close to Budget
 - Red Exclamation Point: Over Budget
- Underneath each Expense line, users can click into that line to see the detail for each heading. The order of the information is Budget, Actuals, Encumbrances and Remaining Balance when users view the Expense Lines

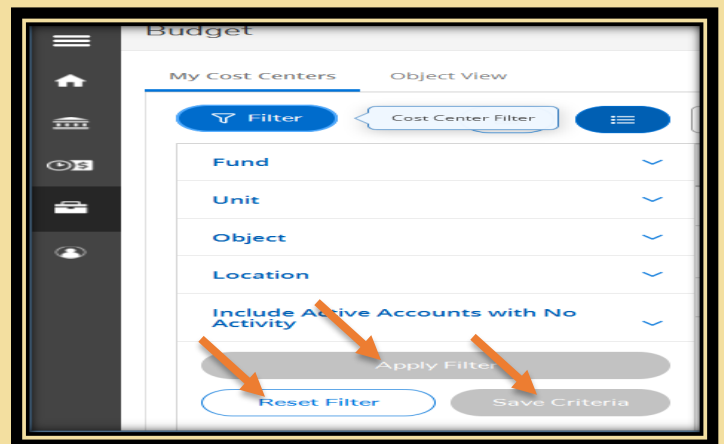


Filter

Using the Filter icon will allow you to select by each GL component (Fund, Loc, Unit, Object), or a combination of components. Click the Component you want to filter on and enter the value of that component that you want to view and then click the "Apply Filter" button.

If you have created a Filter that you would like to re-use at a later date click the "Save Criteria" button and give the filter a name. Once you save filter criteria, it can be recalled by clicking the Filter button and selecting the name of your saved filter.

Filters can be reset at any time by clicking "Reset Filter"



Exporting Data

At any point within Budgets in self-service, you can use the "Export" button to export the budget or financial data you are viewing to a CSV file that can be opened directly in Excel. The Export button is located in the upper right of the window directly adjacent to the Fiscal Year selection button.

