

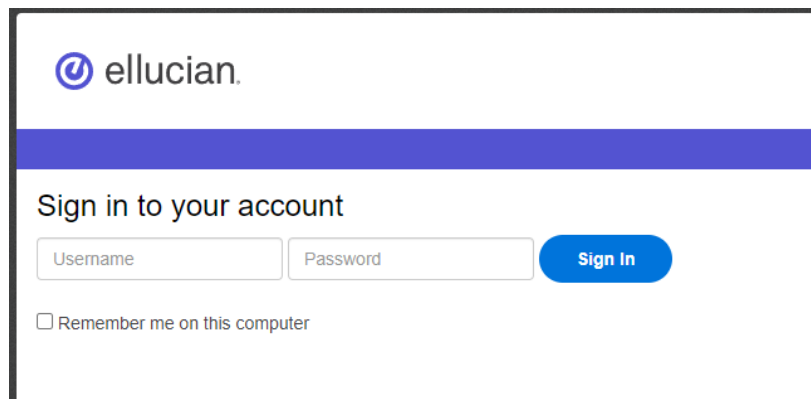


### How to check your budget using Colleague Self-Service


- 1) Go to [amsamoa.edu](https://amsamoa.edu)
- 2) Click on Self-Service



- 3) Log in using your ASCC domain login (same as your office computer login)

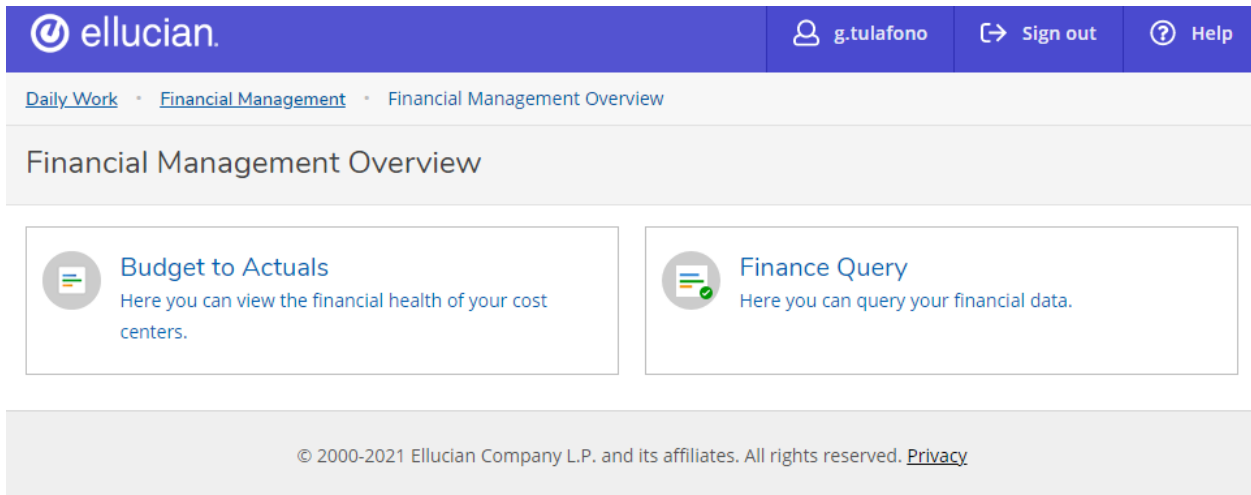


- 4) Once logged in, click on Financial Management



**Financial Management**  
Here you can view the financial health of your cost centers and your projects.

5) Click on Budget to Actuals



The screenshot shows the Ellucian user interface. At the top is a blue navigation bar with the Ellucian logo, the user name 'g.tulafono', and links for 'Sign out' and 'Help'. Below the navigation bar is a breadcrumb trail: 'Daily Work > Financial Management > Financial Management Overview'. The main content area is titled 'Financial Management Overview' and contains two cards. The left card is 'Budget to Actuals' with a description: 'Here you can view the financial health of your cost centers.' The right card is 'Finance Query' with a description: 'Here you can query your financial data.' At the bottom of the page is a footer with the copyright notice: '© 2000-2021 Ellucian Company L.P. and its affiliates. All rights reserved. [Privacy](#)'.

6) To see all of your accounts, leave everything as is, and click on “Apply Filter” on the bottom left

The screenshot shows the 'ellucian' logo in the top left. The top navigation bar includes 'g.tulafono', 'Sign out', and 'Help'. The breadcrumb trail is 'Daily Work > Financial Management > Budget to Actuals'. The main heading is 'Budget to Actuals'. Below this, there are tabs for 'My Cost Centers' and 'Object View'. A 'Filter' button is visible. On the right, there are icons for a grid, a list, a dropdown menu set to 'FY2021', and an 'Export' button. A message box on the right says 'Apply a filter to see the results.' The filter sidebar on the left contains 'Saved Selection Criteria' with a dropdown and a 'Set Default Criteria' button. Below that are dropdowns for 'Fund', 'Center', and 'Object', and a checkbox for 'Include Active Accounts with No Activity'. At the bottom of the sidebar are 'Apply Filter', 'Reset Filter', and 'Save Criteria' buttons.

This will bring up all of your accounts on the right side

This screenshot shows the same interface as the previous one, but with a table of cost centers displayed. The table has the following columns: Cost Center, Budgeted Revenue, Actual Revenue, Budgeted Expenses, Actuals and Encumbrances, Remaining Expenses, % Spent, and Financial Health. The data rows are as follows:

Cost Center	Budgeted Revenue	Actual Revenue	Budgeted Expenses	Actuals and Encumbrances	Remaining Expenses	% Spent	Financial Health
22000 Local Fund : MIS							✓
70900 ARRA Grants and Contracts : ARRA - Distance Learning	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	✓
70900 Local Fund : ARRA - Distance Learning	\$0.00	\$0.00					
71200 ARRA Grants and Contracts : ARRA - Smart Classrooms	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	✓
71200 Local Fund : ARRA - Smart Classrooms	\$0.00	\$0.00					
71300 ARRA Grants and Contracts : ARRA - Telecom Upgrade	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	✓
71300 Local Fund : ARRA - Telecom Upgrade	\$0.00	\$0.00					
71400 ARRA Grants and Contracts :	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	✓

You can double click on the Cost Center title to drill down for more details

22000 Local Fund : MIS	Budget	Actuals	Encumbrances	Remaining	% Received/Spent	Financial Health
Expense	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	✓
51 Personnel	[REDACTED]	[REDACTED]	\$0.00	[REDACTED]	[REDACTED]	✓
52 Supplies	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	✓
53 Operating Expenses	\$0.00	[REDACTED]	\$0.00	[REDACTED]	[REDACTED]	⊘
54 Travel	\$0.00	\$0.00	\$0.00	\$0.00	0%	✓

The black marks should not show up on your report, these numbers are redacted for these instructions.

7) If you wish to see a filtered list of your accounts, enter the account number to limit your view

Filter

Saved Selection Criteria

MIS

Set Default Criteria

Fund

10

Center

22000

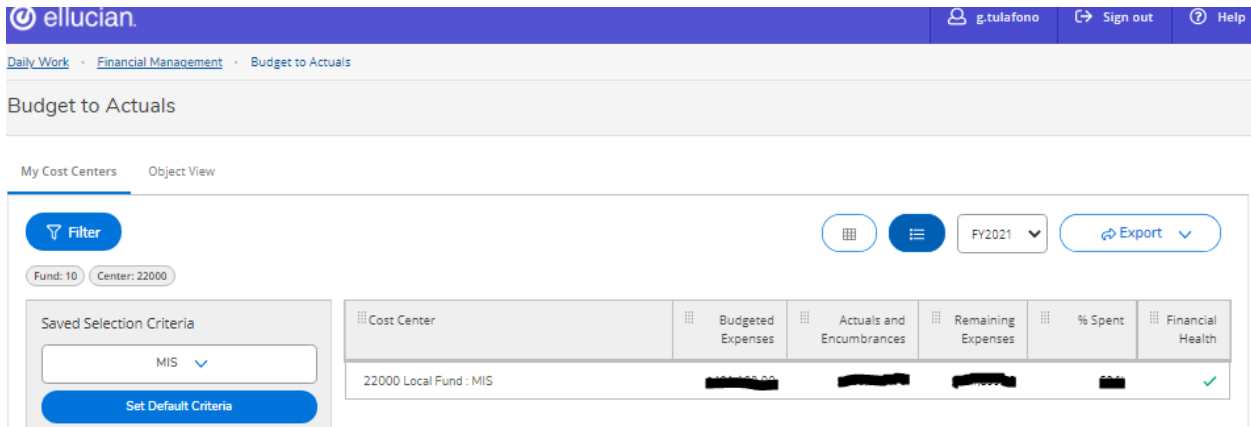
Object

Include Active Accounts with No Activity

Apply Filter

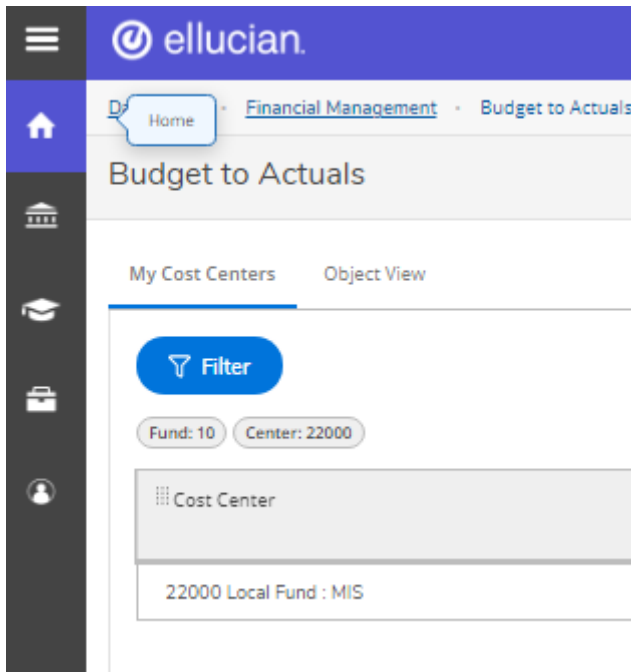
Reset Filter Save Criteria

8) Enter Fund, and/or Center, and/or Object, and click Apply Filter

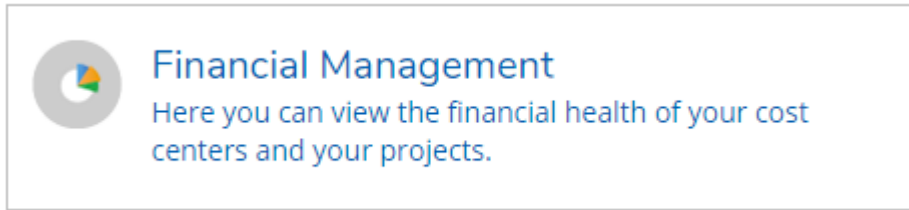


In this example, only the 22000 cost center shows up based on filters

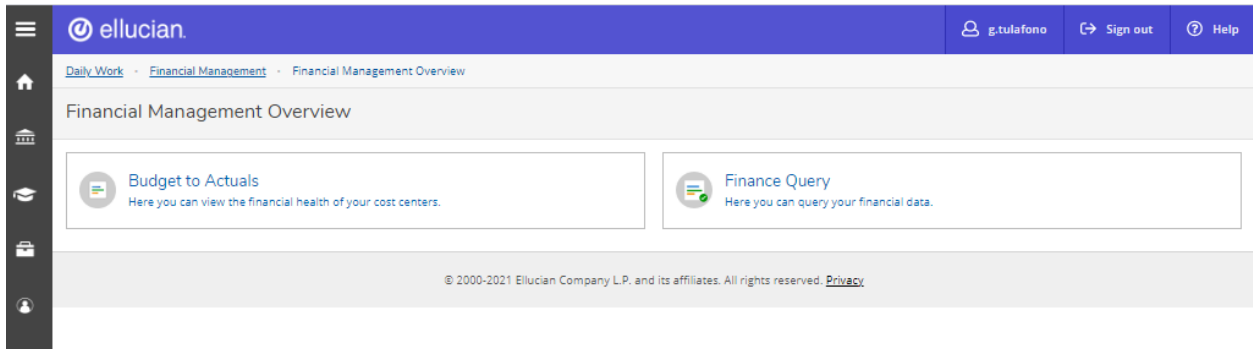
- 9) If you wish to start over, click on the Home button on the left side of the screen. It is the image of a house



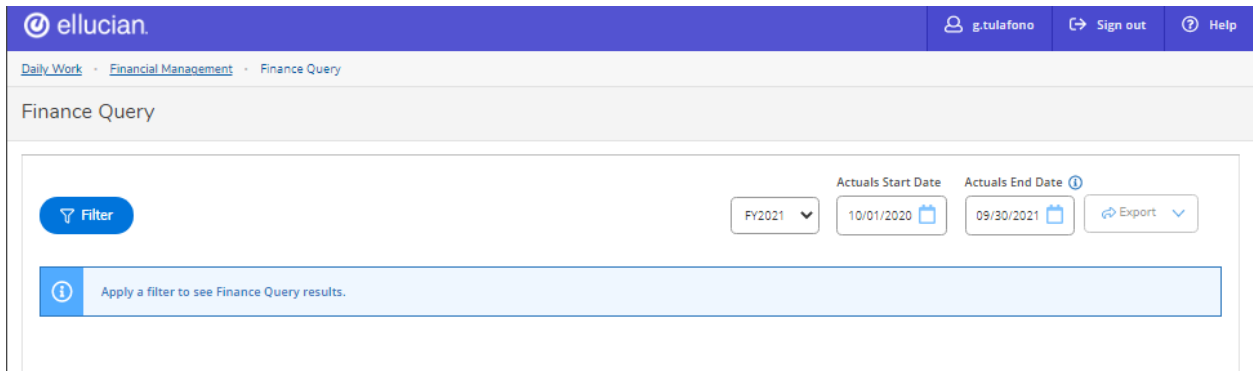
- 10) If you wish to use Finance Query, from your Home screen (the one that comes up when you first log in) click on Financial Management again



11) Then click on Finance Query



12) Use these settings to filter budget information you'd like to review



13) Click on Filter

14) Edit the account information to limit your view, or leave it blank to see all account and click Apply Filter

Filter Finance Query Filter

Actuals Start Date: FY2021 Actuals End Date: 10/01/2020 09/30/2021 Export

GL Account Budget Actuals Requisitions Encumbrances Remaining

10-22000-1402 Local Fund : MIS : AR - Employee Travel	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10-22000-5101 Local Fund : MIS : Salaries	██████████	██████████	\$0.00	\$0.00	██████████
10-22000-5102 Local Fund : MIS : Hourly Wages	\$0.00	██████████	\$0.00	\$0.00	██████████
10-22000-5103 Local Fund : MIS : Faculty Contract	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10-22000-5104 Local Fund : MIS : Summer Contract	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10-22000-5105 Local Fund : MIS : Overtime Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10-22000-5106 Local Fund : MIS : Compensatory Time	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10-22000-5107 Local Fund : MIS : Annual Leave	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10-22000-5108 Local Fund : MIS : Sick Leave	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10-22000-5121 Local Fund : MIS : Employer Social Security	██████████	██████████	\$0.00	\$0.00	██████████

Filter options: Fund, Center, Object, Project, Include Active Accounts with No Activity, Sort Options. Buttons: Apply Filter, Reset Filter, Save Criteria.

Budget information according to your filters will show up on the right side.

15) You can export this to excel using the Export button on the top right corner

Actuals Start Date: 10/01/2020 Actuals End Date: 09/30/2021 Export

Download CSV

Budget	Actuals	Requisitions	Encumbrances	Remaining
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

16) Click on Export, and click on Download CSV. CSV is the format the file that you can open using Microsoft Excel.

17) To log out, click Sign out on the top right corner

The screenshot displays the ellucian application interface. At the top, a blue navigation bar contains the ellucian logo on the left, the user name 'g.tulafono' in the center, and 'Sign out' and 'Help' links on the right. Below this, a breadcrumb trail reads 'Daily Work > Financial Management > Finance Query'. The main content area is titled 'Finance Query' and features a blue 'Filter' button on the left. On the right side of the content area, there are three date selection controls: a dropdown menu for 'Actuals Start Date' currently set to 'FY2021', a date picker for 'Actuals End Date' showing a range from '10/01/2020' to '09/30/2021', and an 'Export' button with a dropdown arrow.