Finance Self Service Organization Managers

Login MYCCP

Enter User Name and Password

Under the employee tab locate the Financial Links and Forms channel

Click one of the links and be directed to Self Service Banner: Budget Queries, View Document, Approve Documents, and Encumbrance Query.

Budget Queries

Budget Quick Query – simple report, no drill down capability, no comparison with prior year

Budget Status by Account

- Can do a comparison with prior year and at any budget period (month)
- Can limit to just year-to-date expenses or include encumbrances, reservations, available balance.
- Has drill down capabilities.
- Can save Query with a name so you don't have to enter parameters each time.
- Can save for your use or to share   (If shared, anyone with security for that fund/org can retrieve the saved query).
- Can download to excel.
- Can download drilled-down info to excel.

- For Budget information, only click on "Adjusted Budget."
- Clicking "Commitment" will show a column to the commitments which are requisitions, payroll encumbrances and PO encumbrances. You can not drill down.
- Clicking on "Encumbrances" and "Reservations" will allow you to drill down to see the detail. Do not click on "Commitments" since this will just add a meaningless column.
- For comparisons, use the same "Fiscal Period" – example 02 for transactions through the second month (August) of the fiscal year.

View Documents

View Pos, Reqs, JVs, Invoices – you need to know the document number and see approval history. Not the same as FOIDOCH – no cross-referencing

Approve Documents

Next Approver vs. All

Drill down to see the requisition
History of approvals to date
Approve or Disapprove – can put in a message

Encumbrance Query
Year = 2006
Period – To get current info, must use current period (ex July =01, Aug =02, etc)
Drill down – if underlined – shows activity against that PO or Req, can also drill down on invoices, journal vouchers, etc