

# How to Access GL Accounts in Self-Service

# Complete the Create/Update User Account Form

- Access the OSRP website at <https://www.campbell.edu/about/leadership/provost/sponsored-research-programs/policies-procedures-and-guidelines/>
- Under the Post Award section select the Human resources: Hiring Manager Resources – [Create/Update User Account](#)

# Complete the Create/Update User Account Form

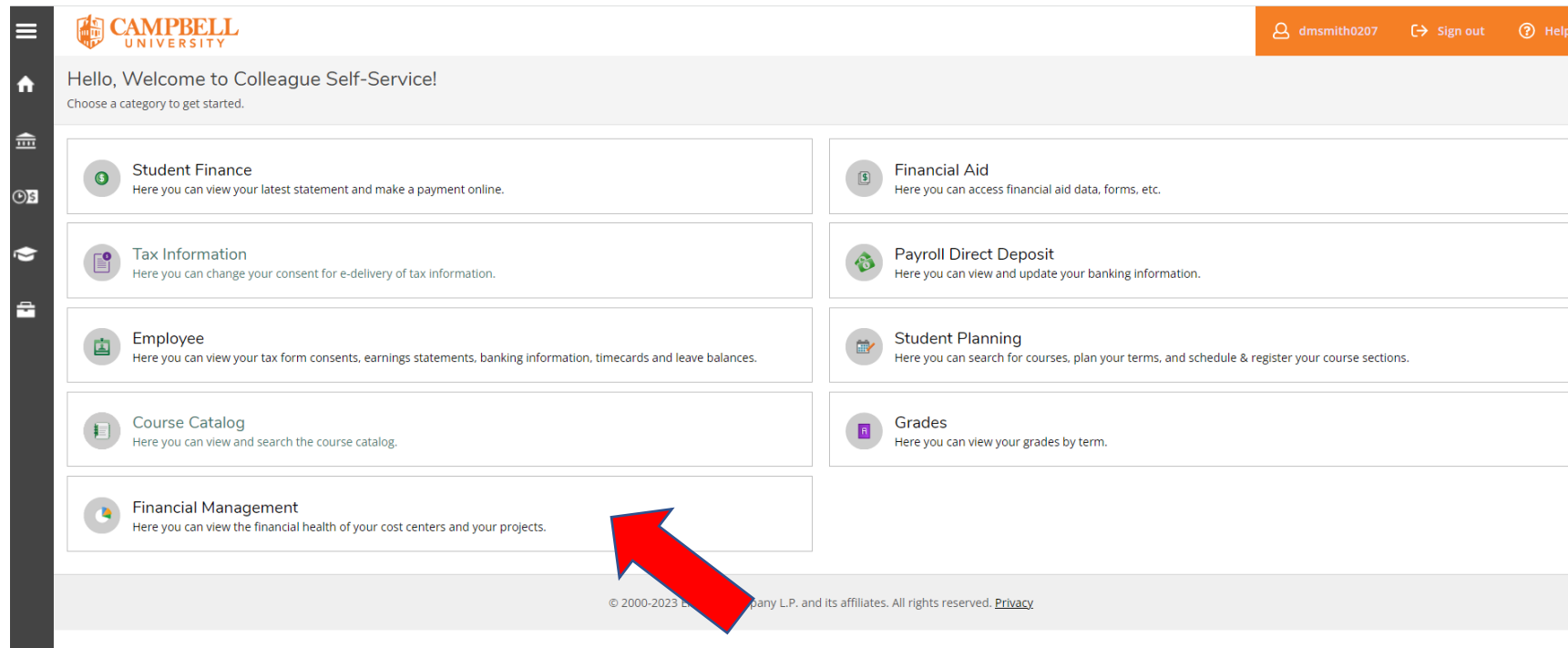
- All sections with an asterisk (\*) need to be completed
- In the Colleague/Benefactor Screens section
  - Need to have access to GL accounts 88XXX, 8XXXX in self-service
- Will this person need access to Online Manager?
  - Enter 'Yes'
  - Then enter the same information as you entered in the Colleague/Benefactor Screens section
  - Please add this person to the following distribution lists
    - Select 'Other'
  - Submit
  - This will be sent to your Department Head to approve and then to main campus to give you access
    - This could take a few business days

# Logging into Self-Service to Access Accounts

- [www.Campbell.edu](http://www.Campbell.edu)
- Click on Login in upper right-hand corner
- Click on Self-Service when the menu pulls up
- Sign in with your Campbell Username and Password

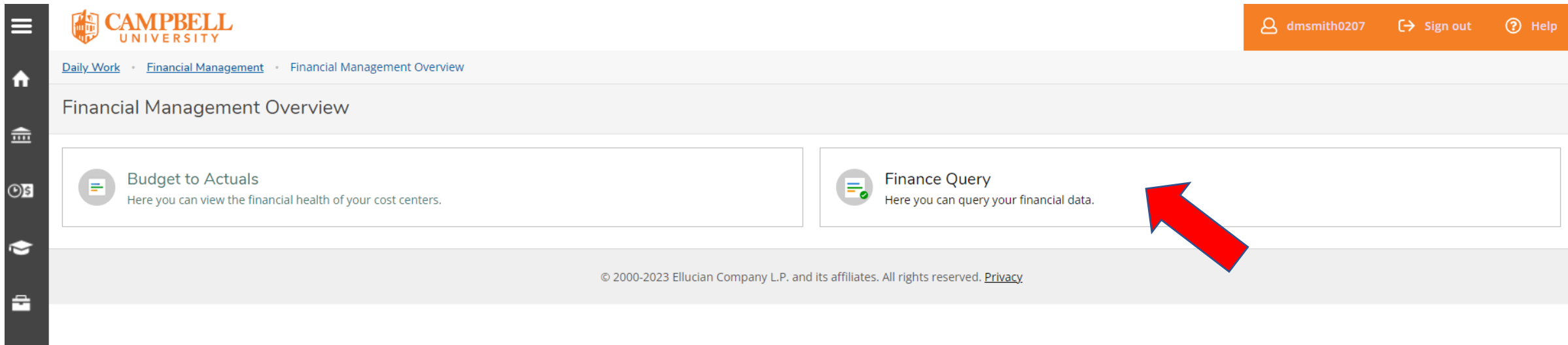
# Self-Service Financial Management Access

- If you have access to the see GL Account in Self-Service you will see the 'Financial Management' tab on the screen



# Financial Management Overview – Finance Query

- Select 'Finance Query'



The screenshot displays the Campbell University Financial Management Overview interface. The header includes the Campbell University logo and user information (dmsmith0207, Sign out, Help). The main content area features two cards: 'Budget to Actuals' and 'Finance Query'. A red arrow points to the 'Finance Query' card.

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

**Finance Query**  
Here you can query your financial data.

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# Financial Management Overview – Finance Query

- Select 'Filter'
- Select the pull down arrow on 'Dept'
- Enter the Dept # (88XXX)
- Select 'Apply Filter'

The screenshot shows the Campbell University Finance Query interface. On the left is a sidebar with a menu. The main area has a header with the Campbell University logo and navigation links. Below the header, there's a 'Finance Query' section. A 'Filter' button is visible. To the right of the filter button, there are date pickers for 'Actuals Start Date' (6/1/2023) and 'Actuals End Date' (5/31/2024), along with a 'PY2024' dropdown and an 'Export' button. A list of filter criteria is shown on the left: Fund, Src, Dept (with a pull-down arrow), Object, Location, Project, Include Active Accounts with No Activity, and Sort Options. The 'Dept' field is currently set to '8805'. Below the list is an 'Apply Filter' button, and at the bottom are 'Reset Filter' and 'Save Criteria' buttons. A message bar says 'Apply a filter to see Finance Query results.'

# Finance Query – con't

- The next screen will pull up the GL Account for the current fiscal year
- You can click on one of the GL account sections to view more detailed information
  - Budget
  - Encumbrances
  - Actuals
  - Remaining

Finance Query

Filter

Dept: 88098

Actuals Start Date: FY2023 Actuals End Date: 6/1/2022 5/31/2023 Export

GL Account	Budget	Actuals	Requisitions	Encumbrances	Remaining
80-0-88098-31999-0 Traore-NIH-R15ES032102 : Fund Balance : Main Campus	\$0.00	\$20,335.00	\$0.00	\$0.00	-\$20,335.00
80-0-88098-49012-0 Traore-NIH-R15ES032102 : Indirect Cost Revenue Share : Main Campus	\$0.00	-\$45,582.38	\$0.00	\$0.00	\$45,582.38
80-0-88098-49025-0 Traore-NIH-R15ES032102 : Grant Revenue : Main Campus	\$0.00	-\$108,923.52	\$0.00	\$0.00	\$108,923.52
80-0-88098-51101-0 Traore-NIH-R15ES032102 : Faculty Salaries : Main Campus	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
80-0-88098-51104-0 Traore-NIH-R15ES032102 : Graduate Assistants : Main Campus	\$0.00	\$7,411.89	\$0.00	\$0.00	-\$7,411.89
80-0-88098-51116-0 Traore-NIH-R15ES032102 : Salary Expense : Main Campus	\$0.00	-\$1,483.51	\$0.00	\$0.00	\$1,483.51
80-0-88098-51120-0 Traore-NIH-R15ES032102 : Fringe Benefits : Main Campus	\$0.00	-\$131.65	\$0.00	\$0.00	\$131.65
80-0-88098-51202-0 Traore-NIH-R15ES032102 : Student Help - Institutional : Main Campus	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
80-0-88098-54506-0 Traore-NIH-R15ES032102 : Subaward Expense : Main Campus	\$0.00	\$15,446.53	\$0.00	\$10,500.00	-\$25,946.53
80-0-88098-55001-0 Traore-NIH-R15ES032102 : Travel : Main Campus	\$0.00	\$7,378.30	\$0.00	\$0.00	-\$7,378.30
80-0-88098-56016-0 Traore-NIH-R15ES032102 : Animal Supplies : Main Campus	\$0.00	\$5,813.07	\$0.00	\$0.00	-\$5,813.07
80-0-88098-56044-0 Traore-NIH-R15ES032102 : Lab Supplies : Main Campus	\$0.00	\$11,942.74	\$0.00	\$0.00	-\$11,942.74



# Finance Query – con't

- You can then click on the hyperlinks to see more information regarding the PO or voucher information in the Encumbrances and Actuals sections

**CAMPBELL UNIVERSITY** 80-0-88098-54506-0 Traore-NIH-R15E032102 : Subawardee... Sign out Help

[Daily Work](#) [Financial Management](#) [Finance Query](#)

[80-0-88098-54506-0 Traore-NIH-R15E032102 : Subawardee...](#) PY2023 Export

Encumbrances				\$10,500.00
Document	Date	Description		Amount
P0231284	5/17/2023	Barry R. Zirk		\$10,500.00

Actuals				\$15,446.53
Actuals 6/1/2022 - 5/31/2023				\$15,446.53
Document	Date	Description		Amount
V0972428	5/17/2023	Barry R. Zirk		\$3,500.00
V0963050	1/23/2023	Barry R. Zirk		\$5,250.00
V0954563	10/14/2022	Barry R. Zirk		\$5,250.00
V0949932	8/30/2022	Johns Hopkins University		\$163.41
V0946672	7/21/2022	Johns Hopkins University		\$1,283.12
V0945537	7/1/2022	Johns Hopkins University		\$1,366.72
I216014	6/1/2022	CUSOM accruals FY22		-\$1,366.72

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**CAMPBELL UNIVERSITY** 80-0-88098-54506-0 Traore-NIH-R15E032102 : Subawardee Expense - Main Campus Sign out Help

[Daily Work](#) [Financial Management](#) [Finance Query](#)

[Voucher V0972428](#)

Status	Reconciled	Voucher Date	5/17/2023
Vendor	1179296 Barry R. Zirk	Due Date	5/17/2023
Amount	\$3,500.00	Invoice Number	0006
Maintenance Date	5/17/2023	Invoice Date	5/1/2023
Requestor		Check Number	0013492
Associated Document	P0231284	Check Date	5/18/2023
Attachments	No Attachments	AP Type	0008 Special Purpose

Line Items	Description	Quantity	Price	Extended Price
1	Personal service agree- ment: July 1, 2022- August 31, 2023	10	\$350.0000	\$3,500.00

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