Instructions on:

- Login to Self-Service  Slide 3
- Making a Budget Transfer  Slide 6
- Making a Multiline Budget Transfer  Slide 11
Select myDixie or Faculty & Staff then Banner Links
Click on “Self-Service (PROD)”
User Login Screen

Type in your User ID (Employee ID#), and your PIN.
(Business Services will notify you regarding your PIN for production use after you have completed and turned in a “Banner Finance Access Request” form.)
Main Menu

Click on Finance (either option)

If you ever need to change your PIN or your security question, you can change them through the “Personal Information” menu.
Finance Main Menu

Budget Queries
Encumbrance Query
Approve Documents
View Document
Budget Transfer
Multiple Line Budget Transfer
Crystal Enterprise-Banner Reports
Budget Transfer

Enter Transaction Date (Date budget entry will be posted).
Select ZD04 for all General Fund Transfers
Enter D (In Chart of Accounts)
Enter Amount to transfer between Index Codes
Enter Index Codes
Enter Budget Period (01 = July, 02 = August, etc.)
Enter Description (Why you are transferring budget).

Click Complete – This will cause the index codes to disappear and the Fund, Organization, & Program Codes to fill in.
Budget Transfer

Enter Account Codes (Must be between 650000 and 799999 (i.e. 700000).

Click Complete to complete Budget Transfer.
You will receive a document number and that your transfer has been completed and forwarded to the posting process.
Multiple Line Budget Transfer

Enter Amount of transfer between all Index Codes
(Use the absolute value - no +’s or –’s just a total).

Enter Transaction Date (Date budget entry will be posted).

Select ZD04 for all General Fund Transfers

Enter D (In Chart of Accounts)

Enter Index Codes

Enter Amount of each Transfer select (-) for the “from” budget and (+) for the “to” budget.

Enter Budget Period (01 = July, 02 = August, etc.)

Enter Description (Why you are transferring budget).

Click Complete – This will cause the index codes to disappear and the Fund, Organization, & Program Codes to fill in.
Multiple Line Budget Transfer

Enter Account Codes (Must be between 650000 and 799999 (i.e. 700000)).

Click Complete to complete Budget Transfer.

You will receive a document number and that your transfer has been completed and forwarded to the posting process.
Notes

- Contact the Admin Computing Office about:
  - User ID
  - PIN.

- Help with Self-Service can be obtained by contacting:
  - Business Services Staff
The End