**Quick Reference Guide – Naznet Self-Service**

**Finance Query: The New Naznet Budget Summary**

**IMPORTANT CONSIDERATIONS**

* The old Naznet Budget Summary will be going away in June 2021
* The new Naznet Self-Service Finance Query allows you to:
	+ View multiple fiscal years
	+ Export to a csv file and open the file in Excel
	+ Save and name multiple selection criteria so you can go view the results for the same accounts without having to enter account numbers each time

**General Login**

1. Go to the site https:mynaznetss.naz.edu
2. Login with your MyNaz username and password
3. Click the “Sign In” button

**View Your Budget or Restricted Account**

1. Select “Financial Management”



1. Select “Finance Query”

 *NOTE: Once you set a default criteria it will be executed automatically when you come to this screen.*

* Click “Got it”



1. Select the FY (Fiscal Year Ending), Actuals Start Date, and Actuals End Date that you want included in your report
2. Click “Filter” to select the Fund(s), Unit(s), Object(s) that you want to include
* To view all the accounts you have access to (similar to “My Budget” in Naznet)
	+ Skip to Step 8 and click “Apply Filter”
* To select specific accounts to view you can:
	+ Enter one fund (ie: 11) or multiple funds (ie: 11-17 or 11,12)
	+ Include ranges separated by “-“ or “,”
	+ Leave a component field blank (ie: object) if you want all objects from a certain unit to be included
1. Answer whether you want to include active accounts with no activity (meaning the account has a $0 balance)
2. Select Sort Options
* Recommend Sort by Fund and Unit
* Check the box for Subtotal



(You can ignore the “Project” field – we don’t use that functionality)

1. If you will need to pull up this same group of account numbers again click “Save Criteria” if not skip to Step 8.





* Things to note when you “Save Criteria”
	+ You can name the selection criteria when you save it
	+ You can either override a previous criteria saved or save multiple criteria under different names
	+ Your Saved Selection Criteria will appear just under the Filter button; click on the dropdown arrow to select a saved selection criteria. See the example above for the saved criteria “Test”
1. Click “Apply Filter”
* Your results will appear
* You can select how many rows you want to appear on a page (25, 50 or 100)
* Scroll to the bottom of the page and you can see whether there are multiple pages
	+ Click arrows to other pages as needed

**Export Results**

1. Select the Export drop down arrow
2. Click on Download CSV
3. Open with Microsoft Excel (default) – Click OK



**Account details (Drill Down)**

1. To view the account details click on the G/L account (ex. 11-1203002-53020)





**View a Different Fiscal Year for the Same Accounts**

After you have “Applied Filter” and viewed your selected accounts, you can select a different fiscal year to view for the same set of accounts

1. Click on the dropdown menu next to FY2021
2. Select the fiscal year that you want to view (ie: FY2020)
	1. Note the start and end dates for the fiscal year will update automatically
3. The filters will update and the next fiscal year results will be displayed