Self-Service Refresher Course for Payroll & Finance
Instructions on:

How to:
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- Employee Self-Service • Slide 6
- Pay Information • Slide 8
- Viewing Your Pay Stub • Slide 12
- Check Your Exemptions • Slide 16
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Dixie State University Homepage

Select myDixie or select Faculty & Staff then Banner Links
Click on “Self-Service (PROD)”
Type in your User ID (Employee ID#), type in your PIN.
Main Menu

Click on one of the “Employee” menus.

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

- Pay Information
  - View your Direct Deposit information
  - View your Earnings and Deductions History
  - View your Pay Stub

Tax Forms
  - Change W-4 Information
  - View your W-2 Form or TI Form

Time Off
  - Current Balances and History

RELEASE: B.8.1
Earnings History Menu

Select Earnings to View

Select a date range to which to view your earnings and then click View Earnings Summary.

From Date: January 2013
To Date: December 2013

Display

RELEASE: 8.6
# Gross Earnings by Type

## View Earnings

Click on the underlined earnings type to view a monthly breakdown of your earnings and hours.

### Earnings from January 2013 to December 2013

<table>
<thead>
<tr>
<th>Earnings Type</th>
<th>Total Gross Pay</th>
<th>Total Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Preference</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Day</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regular</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sick Leave</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vacation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**RELEASE: 6.6**

[New Date Range]
Pay Information Menu

Pay Information

Direct Deposit Breakdown
Earnings History
Pay Stub
Choose Earn By Positions

RELEASE: 8.8.1
Pay Stub Menu

Choose the calendar year

Pay Stub Year: 2013

Display
**Pay Stub Summary**

- **Pay Stubs for 2010**
  - **Dec 29, 2010**
    - Pay Stub Date: Dec 29, 2010
    - Pay Period Begin Date: Nov 21, 2010
    - Pay Period End Date: Dec 20, 2010
  - **Nov 30, 2010**
    - Pay Stub Date: Nov 30, 2010
    - Pay Period Begin Date: Oct 21, 2010
    - Pay Period End Date: Nov 20, 2010
  - **Oct 29, 2010**
    - Pay Stub Date: Oct 29, 2010
    - Pay Period Begin Date: Sep 21, 2010
    - Pay Period End Date: Oct 20, 2010
  - **Sep 30, 2010**
    - Pay Stub Date: Sep 30, 2010
    - Pay Period Begin Date: Aug 21, 2010
    - Pay Period End Date: Sep 20, 2010

*Choose a Pay Stub*
Click on the "Employee" menu at the top.
Employee Services Menu

myDIXIE

Employee

Request Time Off
Must be on campus to use.

View your Direct Deposit breakdown. View your Earnings and Deductions History. View your Pay Stub.

Tax Forms
- Change W-4 Information
- View your W-2 Form or T4 Form.

Current Balances and History

RELEASE: 8.8.1
Tax Forms Menu

W-4 Tax Exemptions/Allowances
Electronically W-2 Consent
W-2 Year End Earnings Statement
W-2c Corrected Wage and Tax Statement.

RELEASE: 8.8.1
W-4 Tax Exemptions/Allowances

Your W-4 information determines the amount of Federal Tax that is withheld from your pay.

**Federal Tax**
- As of Date: Dec 04, 2013
- Name:
- Address:
- Last Name differs from SSN card: No
- Deduction Status: Active
- Start Date: Aug 19, 2010
- End Date:
- Filing Status: Single
- Number of Allowances: 0
- Additional Withholding:

**Release:** 8.6.1
W-2 Wage and Tax Statement

Please choose the Tax Year and Employer/Institution for the W-2 you wish to view and click the View W-2 button.

Tax Year: 2012
Employer or Institution: Dixie State College of Utah

[ W-4 Tax Exemptions/Allowances ]

RELEASE: 8.6.1
Electronic W-2 Consent
Electronic W-2 Acceptance

You will not get a paper copy of your W-2 if you accept.
Vacation & Sick Leave
### Leave Balances

To view the pay period breakdown for a particular type of leave, click on the underlined type of leave.

<table>
<thead>
<tr>
<th>List of Leave Types</th>
<th>Hours or Days</th>
<th>Available Balance</th>
<th>Earned as of Dec 04, 2013</th>
<th>Taken as of Dec 04, 2013</th>
<th>Available Balance as of Dec 04, 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Preference Day</td>
<td>Hours</td>
<td>.00</td>
<td>8.00</td>
<td>8.00</td>
<td>.00</td>
</tr>
<tr>
<td>Sick Leave</td>
<td>Hours</td>
<td>9.10</td>
<td>88.00</td>
<td>76.80</td>
<td>20.30</td>
</tr>
<tr>
<td>Vacation Leave</td>
<td>Hours</td>
<td>44.65</td>
<td>121.30</td>
<td>88.65</td>
<td>77.30</td>
</tr>
</tbody>
</table>

[Pay Stub]

**RELEASE: 8.3.0.1**

Click on a Leave type to see the detail.
<table>
<thead>
<tr>
<th>Payroll Type</th>
<th>Date Paid</th>
<th>Pay Period Begin Date</th>
<th>Pay Period End Date</th>
<th>Hours</th>
<th>Days Earned</th>
<th>Days Taken</th>
</tr>
</thead>
<tbody>
<tr>
<td>Semi-Monthly</td>
<td>Sep 28, 2012</td>
<td>Sep 16, 2012</td>
<td>Sep 30, 2012</td>
<td>4.00</td>
<td>.00</td>
<td></td>
</tr>
<tr>
<td>Semi-Monthly</td>
<td>Sep 14, 2012</td>
<td>Sep 01, 2012</td>
<td>Sep 15, 2012</td>
<td>4.00</td>
<td>.00</td>
<td></td>
</tr>
</tbody>
</table>
Finance Self-Service Refresher

- Lookup finance transactions
- View budget balance
- View finance documents
Finance Main Menu
Select Query Type

Budget Query by Account allows you to review budget information by account for the Fiscal Period and Year to Date by: Specific FOAPAL/Index values, Specific Organization, All Organizations, Grant, Fund Type, Account Type, or Revenue Accounts.

Budget Query by Organizational Hierarchy allows you to review budget information of organizations for the Fiscal Period and Year to Date by: Hierarchical Structure, Specific Funds, High-level Organizations, Accounts, Programs, Fund Type, Account Type, or Revenue Accounts.
Select Report Columns

Select the Operating Ledger Data columns to display on the report.

- [x] Adopted Budget
- [x] Revenue & Expense Actuals
- [x] Budget Adjustments
- [x] Encumbrances
- [x] Adjusted Budget
- [x] Reservations
- [ ] Temp Budget
- [ ] Commitments (Enc)
- [x] Accounted Budget
- [x] Available Balance

Save Query as: [ ]

Shared [ ]

Continue [ ]

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

RELEASE: 8.3
Fill in Required Fields
Click “Submit Query” Again
### Budget Report

**MyDIXIE**

**Report Parameters**

- **Organization Budget Status Report**
  - By Account Code
  - Period Ending Jun 30, 2013
  - As of Dec 04, 2013

<table>
<thead>
<tr>
<th>Chart of Accounts (Use D)</th>
<th>D Dixie State College of Utah</th>
<th>Commitment Type</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund (Defaults from Index)</td>
<td>ZZZZZ1 Payroll Default Fund Code</td>
<td>Program (Defaults from Index)</td>
<td>ZZZZZ2 Payroll Default Program Code</td>
</tr>
<tr>
<td>Organization</td>
<td>ZZZZZ2 ZZZ-Payroll Default Org Code</td>
<td>Activity (N/A)</td>
<td>All</td>
</tr>
<tr>
<td>Account Code</td>
<td>All</td>
<td>Location (N/A)</td>
<td>All</td>
</tr>
</tbody>
</table>

**Query Results**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>660600</td>
<td>Wages Contracted Services</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>
If you are not paying for salaries (account codes between 610000 – 650000) with this budget, this is your current budget balance.
If you are paying for salaries with your budget and you only want to see your operating budget, you will need to separate the salary budgets from the operating budget (account codes between 650000 – 799999).
Open the File

What do you want to do with bwfksdld.csv?

Size: 1.92 KB
Type: Microsoft Excel 2003
From: bannersec.dixie.edu

- Open
  The file won't be saved automatically.
- Save
- Save as

Cancel
You will need to keep at least 3 columns, Account Code, Account Title, & Available Balance.
Insert a Row to Separate Salary & Operating Budgets
Click the AutoSum Button & Press the Enter Key
Operating Budget Balance

Includes account codes between 650000 - 799999.
You may add "user calculated columns" to a query. You may add, subtract, multiply, divide, or get a percent of (variance) any two Operating Ledger Columns, name the columns, and choose where they should be displayed. These columns may be removed, saved, or added from a query or template at any time.

You may add "user calculated columns" to a query. You may add, subtract, multiply, divide, or get a percent of (variance) any two Operating Ledger Columns, name the columns, and choose where they should be displayed. These columns may be removed, saved, or added from a query or template at any time.
## Transaction Detail

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Activity Date</th>
<th>Document Code</th>
<th>Vendor/Transaction Description</th>
<th>Amount Rule Class Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jul 31, 2004</td>
<td>Jul 26, 2004</td>
<td>F0001506</td>
<td>HR Payroll 2004 AD 7 0</td>
<td>500.00 HGNL</td>
</tr>
</tbody>
</table>

**Report Total (of all records):** 500.00

**Available Budget Balance:** (500.00)

Click on the document code to see the document summary.
Click on the document code to view the document.
### Purchase Order Header

<table>
<thead>
<tr>
<th>Purchase Order</th>
<th>Change#</th>
<th>Order Date</th>
<th>Trans Date</th>
<th>Delivery Date</th>
<th>Print Date</th>
<th>Total</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Complete</th>
<th>Approved</th>
<th>Type</th>
<th>Standing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y</td>
<td>Y</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cancel Reason</th>
<th>Date</th>
<th>Requestor</th>
<th>Phone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Tamara Gentry</td>
<td>413100</td>
<td><a href="mailto:gentry@dixie.edu">gentry@dixie.edu</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>435-652-7613</td>
<td></td>
</tr>
</tbody>
</table>
The End