Navigating the New Financial Services Website: finance.wfu.edu

Finance.wfu.edu is the new website for the following combined financial departments:

- Budget & Financial Planning
- Finance Systems
- Financial & Accounting Services, including:
  - Accounts Payable
  - Campus Financial Services & Communications
  - Controller’s Office
  - Financial Accounting & Reporting
  - Payroll
  - Risk Services
  - Strategic Initiatives
  - Student Financial Services
  - Tax Office
- Procurement Services

To better serve the needs of our campus community, the finance departments making up finance.wfu.edu have reorganized our collective information in a more customer-centric, goal oriented format.

Navigating finance.wfu.edu
When visiting finance.wfu.edu, first select your audience group to find needed finance information:

Once you’ve selected your audience, you’ll then be presented with themes to help you more efficiently meet the goal for your visit to our site. Because the site is customer-focused, information within each theme is comprised of any relevant information, tools, forms, or other resources for that particular theme, from whichever financial unit(s) has information pertinent to that topic.

For example, if you are a staff member who has just returned from a conference, you might be looking for the information you need to reconcile your P-Card Statement or complete your Travel & Entertainment Voucher. To find that information, simply select the Faculty & Staff audience. When the Themes display, you would click on the University P-Card theme or the Travel theme to quickly find the information that you need.

Financial Services Quick Guide Library
finance.wfu.edu

Responsible Unit:
Finance Systems

Additional Assistance:
758-5648
rogersjh@wfu.edu

What is it?
This guide has been developed to help users of the new Financial Services website understand how to navigate the site quickly and efficiently.

Why it is Necessary
To support our users in their job roles by providing efficient methods of finding needed information.
Upon clicking a theme, you will find the information neatly organized by the following tabs:

- **Overview** – An introduction to all of the information you’ll find within that theme.
- **How To** – Information and Quick Guides for how to properly complete information for the Financial Services units relevant to that theme.
- **Tools** – Helpful resources such as presentation slides, tips and tricks, and checklists for completing necessary information, as well as frequently asked questions about that theme.
- **Forms** – Any relevant forms required by Financial Services units for the selected theme.
- **Policies & Procedures** – Any relevant policies and procedures that pertain to the selected theme.

**Other Features**

**Navigation Menu**
Your touchstone for finance.wfu.edu is the left side navigation bar. The menu options on this sidebar remain constant as you move throughout the site, and expand as necessary to display sub-menus when they are available.
News
The news box is where financial units can provide timely information regarding important announcements about financial activities that take place during the year, as well as reminders and information or updates on new initiatives. If you see a news item of interest to you, simply click on it to read the full article, or click the “More News” button at the bottom of the box to read all news posts or browse news by subject.

Calendar
This is a listing of the next 7-8 finance-related events, and includes meeting dates as well as due date reminders. Clicking the “Full Calendar” button at the bottom of this section takes users to our main financial event calendar, powered by Google. In this view, users can select either a monthly, weekly, or daily view.

Toolbox
The new toolbox feature is found in the lower portion of the left side menu. The options available in the Toolbox are dynamic depending on your audience selection, and provide quick links to those tools that members of that audience need to use most often.

We hope that you will find the new Financial Services website user-friendly and easy to navigate. If you have questions, concerns or feedback about the site, we would love to hear from you! Please complete our email form and in the message, indicate that your feedback should be sent to Jennifer Rogers, Finance Systems.