Budget Office Training

My Finance Self-Service

Budget Status by Organizational Hierarchy Query
Organizational Hierarchy Query is useful for calculating totals different groups of account codes:

- 5xxx- Revenues
- 6xxx- Salary/Fringe
- 7xxx- Expenditures (Operating)
- 8xxx- Capital Outlay (Equipment/Construction)
First, enter the 6-digit ‘Index Number’ ('Organization Number', 'Org Code', or just ‘Org’)

When you do, these fields will auto-populate as seen on the right:
- Fund Number
- Organization
- Program Code
Budget Status by Organizational Hierarchy Query Setup

**Recommended Operating Ledger Columns**
- **Adopted Budget**: Budget at the beginning of the Fiscal Year (October 1)
- **Accounted Budget**: Budget as of ‘today’
- **Year-to-Date**: Transactions that have hit the Organization Code as of today
- **Encumbrances**: Purchase Orders (PO’s-Type of Commitment)
- **Reservations**: Requisitions (Type of Commitment)
- **Available Balance**: Accounted Budget minus Year-to-Date, Encumbrances, and Reservations

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**Scroll down within the selection block. For the most current information, select…**

- **Fiscal Year**: 2022
- **Fiscal Period**: 14

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<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Fiscal Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022</td>
<td>14</td>
</tr>
</tbody>
</table>

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**Operating Ledger**

- **Adopted Budget**
- **Year to Date**
- **Encumbrance**
- **Reservation**
- **Available Balance**
- **Accounted Budget**
- **Budget Adjustment**
- **Adjusted Budget**
- **Temporary Budget**
- **Commissions**

**SUBMIT**
The Budget Query will display on one line and show the total amounts. To drill down into the query, click on the Organization Number (*directly above the ‘Report Total’)*
Reading the Budget Status by Organizational Hierarchy

Click on the ‘Account Type’ to drill down even further. You will eventually come to individual account codes.
Questions?

Contact us!
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