### **Budget Office Training**

My Finance Self-Service

Budget Status by Organizational Hierarchy Query

## Budget Status by Organizational Hierarchy Setup

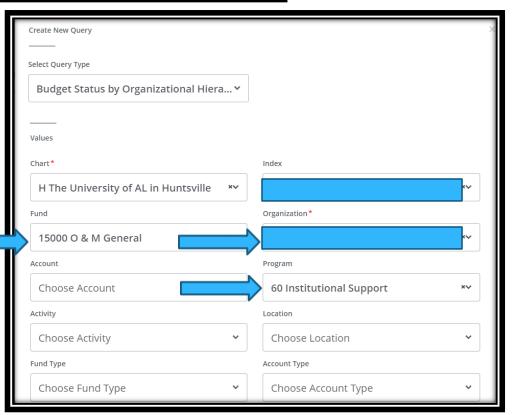
- \* Organizational Hierarchy Query is useful for calculating totals different groups of account codes:
  - \* 5xxx- Revenues
  - \* 6xxx- Salary/Fringe
  - \* 7xxx- Expenditures (Operating)
  - \* 8xxx- Capital Outlay (Equipment/Construction)

Budget Status by Organizational Hierarchy

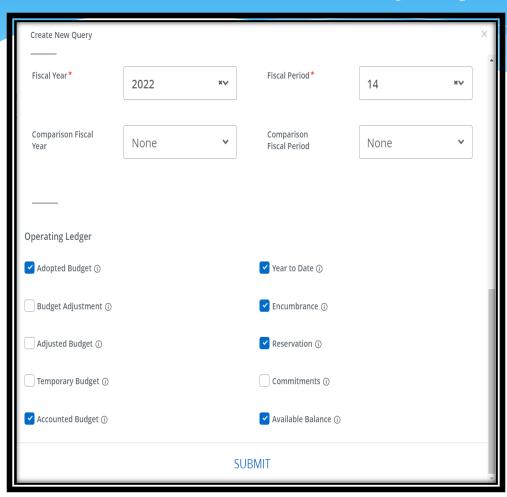


First, enter the 6-digit 'Index Number'
('Organization Number', 'Org Code', or just 'Org')

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



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

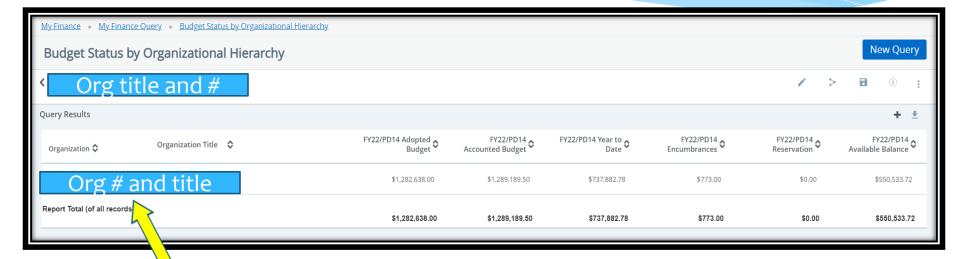
Fiscal Year- 2022
Fiscal Period- 14

#### **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 which is =

Accounted Budget minus Year-to-Date, Encumbrances, and Reservations

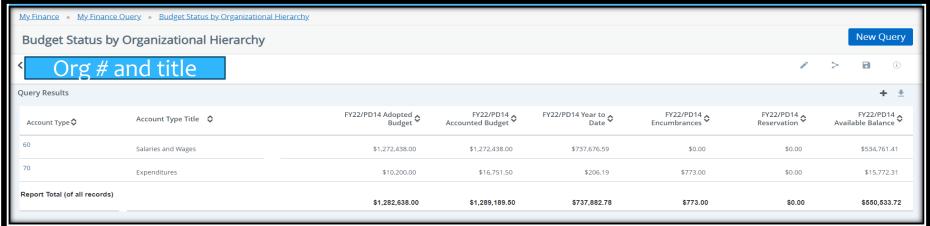
# Reading the Budget Status by Organizational Hierarchy



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.



I	Query Results				
	Account 💠	Account Title 💠	FY22/PD14 Adopted ❖ Budget ❖	FY22/PD14 Accounted Budget	FY22/PD14 Year to Date
	7000	Expenditures	\$10,200.00	\$31,751.50	\$0.00
I	7152	Institutional Dues & Membership	\$0.00	\$0.00	\$100.00
I	7156	Postage and Freight	\$0.00	\$0.00	\$1,040.35
ı	7174	Software Purchase	\$0.00	\$0.00	\$8,032.50
I	7401	Xerox & Duplicating	\$0.00	\$0.00	\$1,745.98
	7404	Office Supplies	\$0.00	\$0.00	\$1,511.92

### Questions?



#### Contact us!

Melissa Brown: maboo63@uah.edu; Ext 5217 Tammy Haymon: tghooo8@uah.edu; Ext 2242