

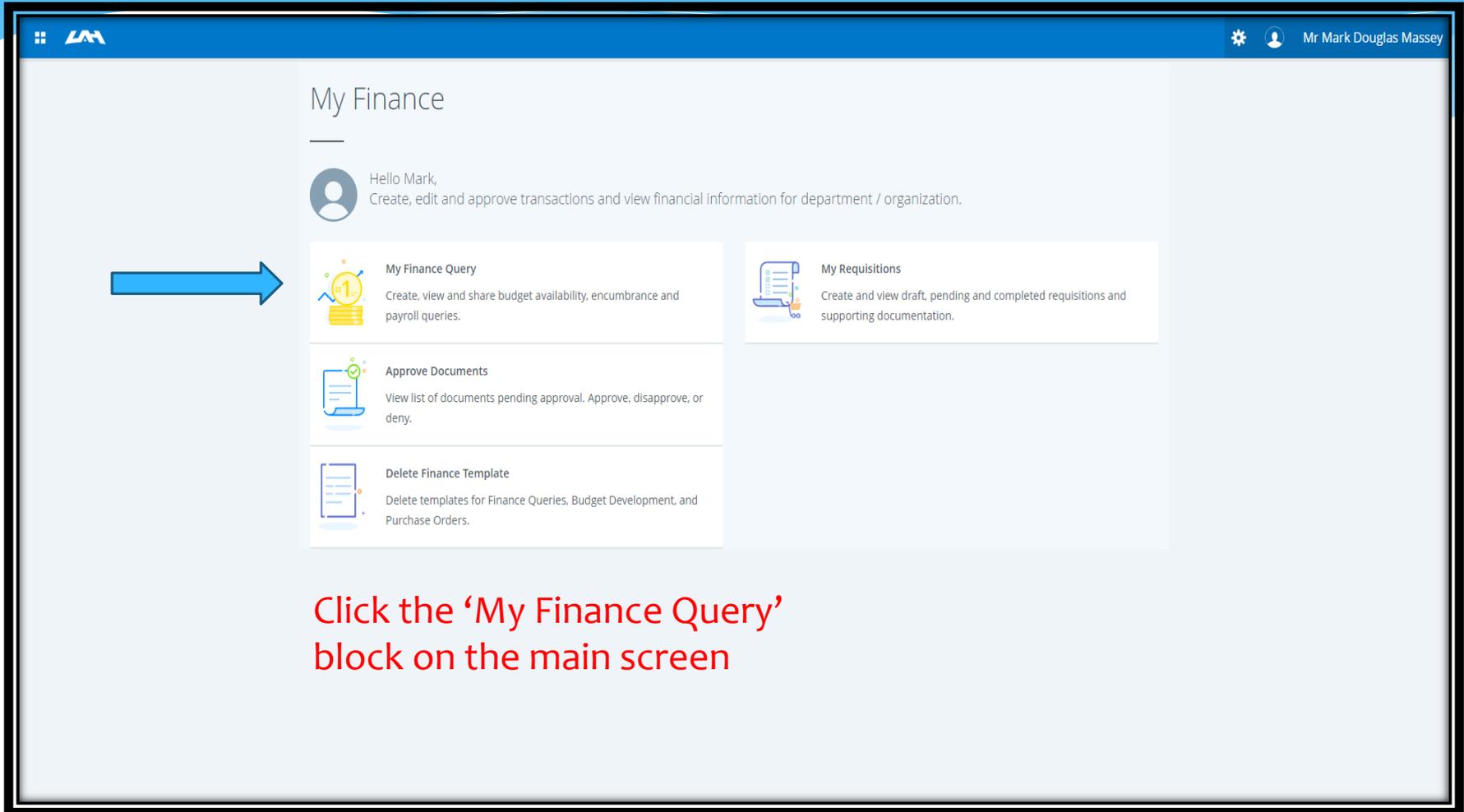
Budget Office Training

My Finance Self-Service

Budget Status by Account:
Finding Revenues

My Finance

Budget Status by Account Query-Revenues

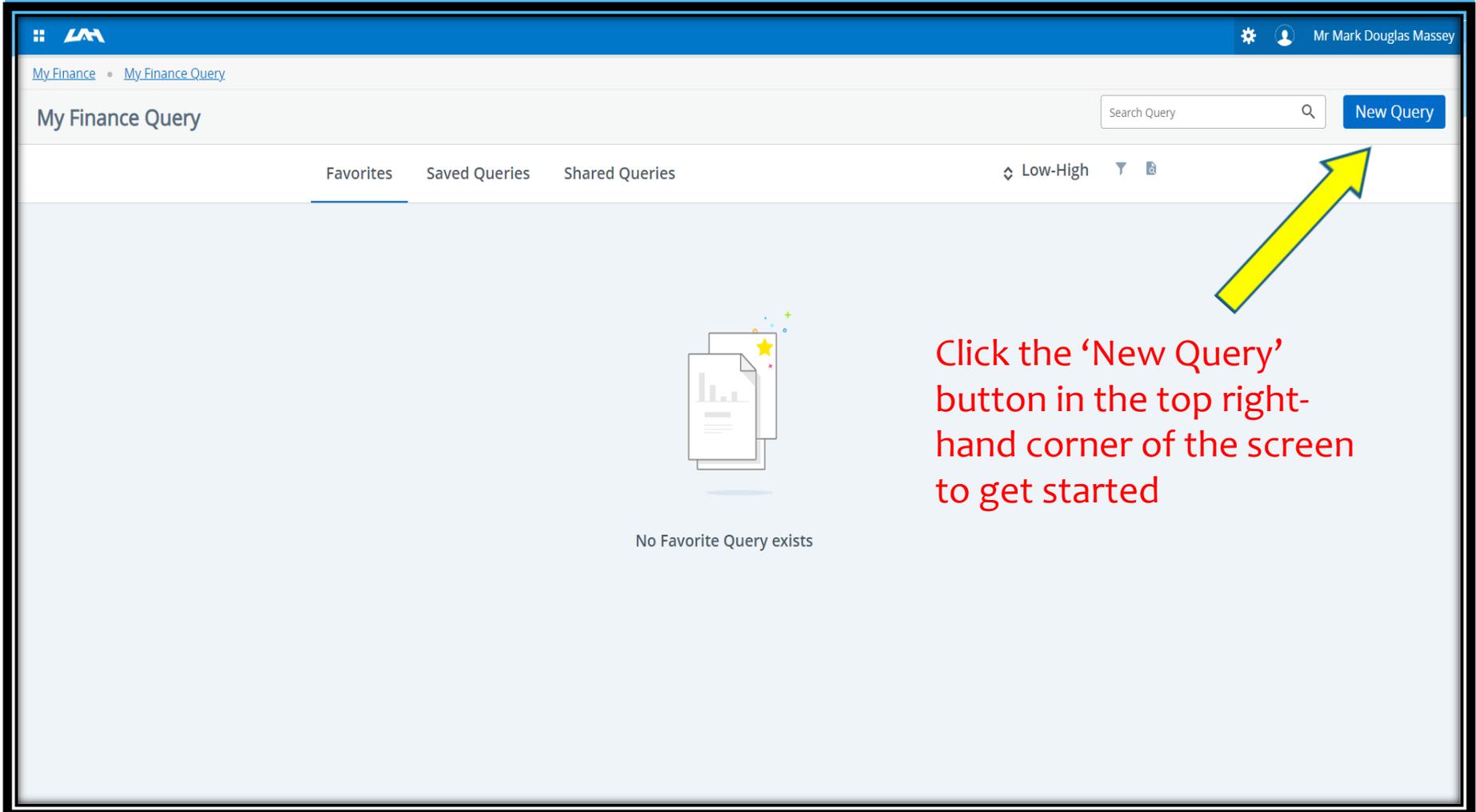


The screenshot shows a user interface for 'My Finance'. At the top, there is a blue header with a logo on the left and a settings icon, a user profile icon, and the name 'Mr Mark Douglas Massey' on the right. Below the header, the main content area is titled 'My Finance'. A horizontal line separates the title from the user information. The user information includes a profile icon, the name 'Hello Mark,', and a description: 'Create, edit and approve transactions and view financial information for department / organization.' Below this, there are four main blocks. The first block is 'My Finance Query', which is highlighted by a large blue arrow pointing from the left. It features an icon of a lightbulb with a dollar sign and a plus sign, and the text: 'Create, view and share budget availability, encumbrance and payroll queries.' The second block is 'My Requisitions', with an icon of a document and a plus sign, and the text: 'Create and view draft, pending and completed requisitions and supporting documentation.' The third block is 'Approve Documents', with an icon of a document and a checkmark, and the text: 'View list of documents pending approval. Approve, disapprove, or deny.' The fourth block is 'Delete Finance Template', with an icon of a document and a minus sign, and the text: 'Delete templates for Finance Queries, Budget Development, and Purchase Orders.'

Click the 'My Finance Query' block on the main screen

My Finance

Budget Status by Account Query-Revenues



The screenshot displays the 'My Finance Query' interface. At the top, there is a blue header with the 'AM' logo on the left and a user profile 'Mr Mark Douglas Massey' on the right. Below the header, the breadcrumb 'My Finance > My Finance Query' is visible. The main content area has a search bar labeled 'Search Query' and a blue 'New Query' button. Below the search bar, there are tabs for 'Favorites', 'Saved Queries', and 'Shared Queries'. The 'Favorites' tab is currently selected. In the center of the screen, there is an icon of a document with a star and the text 'No Favorite Query exists'. A yellow arrow points from the bottom right towards the 'New Query' button.

Click the 'New Query' button in the top right-hand corner of the screen to get started

My Finance

Budget Status by Account Query-Revenues

My Finance Query

Search Query

Mr Mark Douglas Massey

Create New Query

Select Query Type

Budget Status by Account

Values

Chart* H The University of AL in Huntsville

Fund Choose Fund

Account Choose Account

Activity Choose Activity

Fund Type Choose Fund Type

Index Choose Index

Organization* Choose Organization

Program Choose Program

Location Choose Location

Account Type Choose Account Type

Make sure that your Chart of Accounts is Set to 'H' ('F' for Foundation Orgs)

Select the 'Budget Status by Account' option from the Drop-down menu.

My Finance

Budget Status by Account Query-Revenues

Create New Query

Select Query Type

Budget Status by Account

Values

Chart*

H The University of AL in Huntsville

Index

Choose In

Click here!!!!

New Query

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

Create New Query

Select Query Type

Budget Status by Account

Values

Chart*

H The University of AL in Huntsville

Fund

15000 O & M General

Account

Choose Account

Activity

Choose Activity

Fund Type

Choose Fund Type

Index

Organization*

Program

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Location

Choose Location

Account Type

Choose Account Type

My Finance

Budget Status by Account Query-Revenues

Activity: Choose Activity

Location: Choose Location

Fund Type: Choose Fund Type

Account Type: Choose Account Type

Commitment Type: All

Include Revenue Accounts



Click the “Include Revenue” box.

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

Fiscal Year- 2023
Fiscal Period- 14

Create New Query

Fiscal Year*: 2023

Fiscal Period*: 14

Comparison Fiscal Year: None

Comparison Fiscal Period: None

Operating Ledger

Adopted Budget

Budget Adjustment

Adjusted Budget

Temporary Budget

Accounted Budget

Year to Date

Encumbrance

Reservation

Commitments

Available Balance

SUBMIT

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

Revenue Budget Change Requests

- * Requests to increase revenue budgets should be emailed to:
- * Tammy Haymon at tgh0008@uah.edu if you work in Student Affairs, Advancement, or Research.
- * Melissa Brown at mab0063@uah.edu if you work in President/Athletic Office, Academic Affairs, or Diversity.
- * The email request should include the following
 - * Organization Code
 - * Fund Code
 - * Estimated amount

Please note, the Budget Office may request additional information from you related to the revenue source before processing your request.

Questions?



Contact us!

Melissa Brown: maboo63@uah.edu; Ext 5217

Tammy Haymon: tghooo8@uah.edu; Ext 2242