

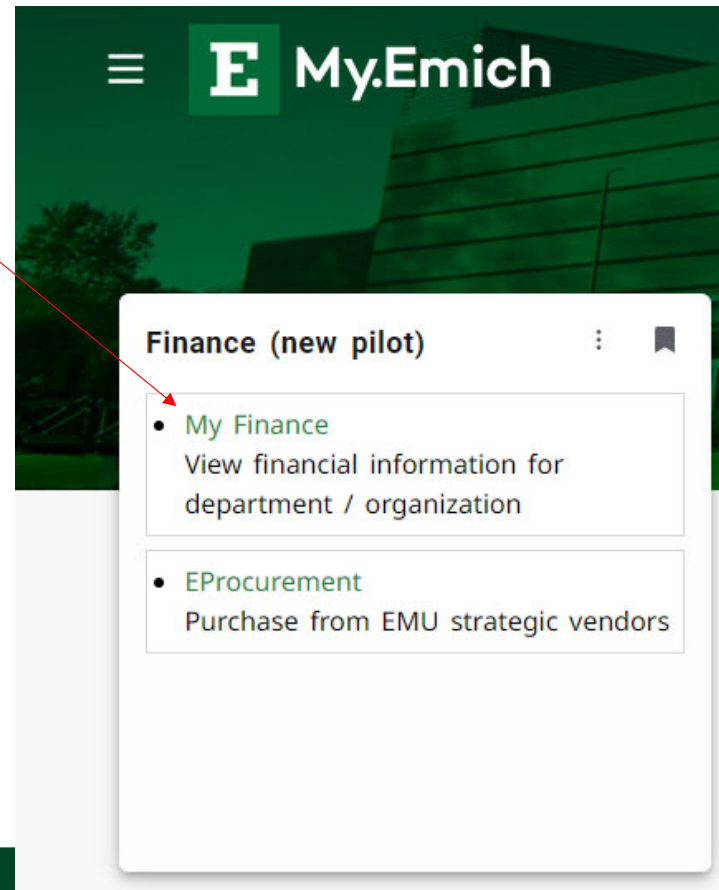


EASTERN MICHIGAN UNIVERSITY

# **Budget Detail Activity Query**

**This is a step by step guide on how to query the specific expenses and revenue that are effecting your budget**

- Go to my.emich.edu
- Then to “My Finance”



- Select “My Finance Query”

**My Finance**

Hello Ryan,  
Create, edit and approve transactions and view financial information for department / organization.

- My Finance Query**  
Create, view and share budget availability, encumbrance and payroll queries.
- My Requisitions**  
Create and view draft, pending and completed requisitions and supporting documentation.
- Approve Documents**  
View list of documents pending approval. Approve, disapprove, or deny.
- Delete Finance Template**  
Delete templates for Finance Queries, Budget Development, and Purchase Orders.
- View Document**  
View draft, pending and completed documents with related information and approval history.

- Select New Query

The screenshot shows a web application interface. At the top, there is a green header bar with a white 'E' logo on the left and a user profile icon labeled 'Ryan Lerright' on the right. Below the header, the breadcrumb path 'My Finance > My Finance Query' is visible. The main content area has a title 'My Finance Query' on the left and a search bar with the placeholder text 'Search Query' and a magnifying glass icon on the right. A blue button labeled 'New Query' is positioned to the right of the search bar. Below the search bar, there are three tabs: 'Favorites' (which is underlined), 'Saved Queries', and 'Shared Queries'. To the right of these tabs, there are icons for sorting (a diamond with 'Low-High'), a filter icon, and a lock icon. The main content area is mostly empty, with a central graphic of a document icon with a yellow star and colorful dots above it. Below this graphic, the text 'No Favorite Query exists' is displayed.

- From the dropdown select “Budget Status by Account”
- Input desired Fund-Org-Program information.
- Scroll Down

Note: If any part of FOAP is left blank it will pull all of the data associated with the org.

The screenshot shows a 'Create New Query' form with the following fields and values:

- Select Query Type:** Budget Status by Account (dropdown)
- Chart\*:** E Eastern Michigan University (dropdown)
- Index:** Choose Index (dropdown)
- Fund:** Choose Fund (dropdown)
- Organization\*:** 125050 Controller (dropdown)
- Account:** Choose Account (dropdown)
- Program:** Choose Program (dropdown)
- Activity:** Choose Activity (dropdown)
- Location:** Choose Location (dropdown)

Red arrows indicate the following actions:

- A vertical arrow points down from the 'Scroll Down' instruction to the 'Choose Fund' field.
- A diagonal arrow points from the 'Budget Status by Account' dropdown to the 'Select Query Type' label.
- A horizontal arrow points from the 'Choose Fund' field to the '125050 Controller' field.
- A vertical arrow points down from the '125050 Controller' field to the 'Choose Program' field.

- Make sure that the Fiscal Year and Period are updated
- Select Comparison year for year over year Comparisons
- Check the blue boxes
- Hit Submit

Period	
July	01
August	02
September	03
October	04
November	05
December	06
January	07
February	08
March	09
April	10
May	11
June	12
Year to Date	14

Note: The query will show you the year to date activity up to the selected period. To only see a single periods activity, unselect the “Year To Date” before hitting submit.

Edit Query ×

---

Fiscal Year\*  x v

Comparison Fiscal Year  v

Fiscal Period\*  x v

Comparison Fiscal Period  v

---

Operating Ledger

Adopted Budget ⓘ

Budget Adjustment ⓘ

Adjusted Budget ⓘ

Temporary Budget ⓘ

Accounted Budget ⓘ

Year to Date ⓘ

Encumbrance ⓘ

Reservation ⓘ

Commitments ⓘ

Available Balance ⓘ

---

SUBMIT

- Results will show the Starting Budget, Year to Date Expenses, Known Future Expenses and Current Remaining Available Balance.
- To see further detail on what makes up a number, click on the blue text

My Finance • My Finance Query • Budget Status by Account

Budget Status by Account New Query

< Detailed Budget Query ✎ > 📄 ⓘ ⋮

Query Results + ↓

Account	Account Title	FY23/PD14 Accounted Budget	FY23/PD14 Year to Date	FY23/PD14 Encumbrances	FY23/PD14 Available Balance
3015	Computer Software Licenses	\$0.00	\$8,459.54	\$0.00	(\$8,459.54)
3020	Computer Hardware Licenses	\$0.00	\$829.33	\$0.00	(\$829.33)
3025	Supplies Dining Non Food Items	\$0.00	\$5.16	\$0.00	(\$5.16)
3035	Supplies Educational and Recr	\$0.00	\$1,644.07	\$0.00	(\$1,644.07)
3095	Supplies Office Departmental	\$0.00	\$3,979.39	\$0.00	(\$3,979.39)
3110	Uniform Purchases	\$0.00	\$0.00	\$0.00	\$0.00
3115	Rent and Lease Exp Equipment	\$0.00	\$2,601.94	\$0.00	(\$2,601.94)
3130	Postage and Shipping	\$0.00	\$2,192.36	\$0.00	(\$2,192.36)
<b>Report Total (of all records)</b>		<b>\$2,792,669.71</b>	<b>\$2,487,046.74</b>	<b>\$277,888.22</b>	<b>\$27,734.75</b>

- Click on the blue text for further detail

Budget Status by Account New Query

← Detailed Budget Query ⓘ

Query Results ↓

Transaction Date	Activity Date	Document Code	Vendor/Transaction Description	Amount	Rule Class Code
10/26/2022	10/27/2022	<a href="#">JC000468</a> ⓘ	Hardcastle-DELL INTERNATIONAL L.L.C	\$591.00	JE16
11/17/2022	11/17/2022	<a href="#">JC000471</a> ⓘ	Hardcastle-DELL INTERNATIONAL L.L.C	\$218.34	JE16
11/29/2022	11/29/2022	<a href="#">Z0000411</a> ⓘ	ODP Business Solutions LLC	\$19.99	INNI
01/04/2023	01/03/2023	<a href="#">!0068989</a> ⓘ	ODP Business Solutions LLC	\$0.00	DNNI
<b>Report Total (of all records)</b>				<b>\$829.33</b>	



- To save this as a favorite to your Dashboard, Select the “Floppy Disk” in the top right hand corner.
- Create a Name
- Select the set as favorite box
- Hit Save

Budget Quick Query

Controllers Available Balance

Query Results

Account	Account Title	Adjusted Budget	Year to Date	Commitments	Available Balance
1210	Admin Professional NBF	\$382,471.15	\$349,498.41	\$32,972.74	\$0.00
1230	PT UAW		\$808,189.29	\$98,963.17	\$0.00
1280	Clerical Secretarial UAW		\$526,844.04	\$66,555.66	\$0.00
1410	Overtime A P T		\$1,124.75	\$0.00	(\$1,124.75)
1430	Overtime Clerical		\$1,623.86	\$0.00	(\$1,623.86)
1510	Temporary A P T		\$28,011.51	\$0.00	(\$28,011.51)
1630	Honorariums	\$0.00	\$2,000.00	\$0.00	(\$2,000.00)
1650	Employee Consultant	\$0.00	\$3,180.00	\$0.00	(\$3,180.00)
<b>Report Total (of all records)</b>		<b>\$2,791,234.35</b>	<b>\$2,480,648.32</b>	<b>\$277,888.22</b>	<b>\$32,697.81</b>

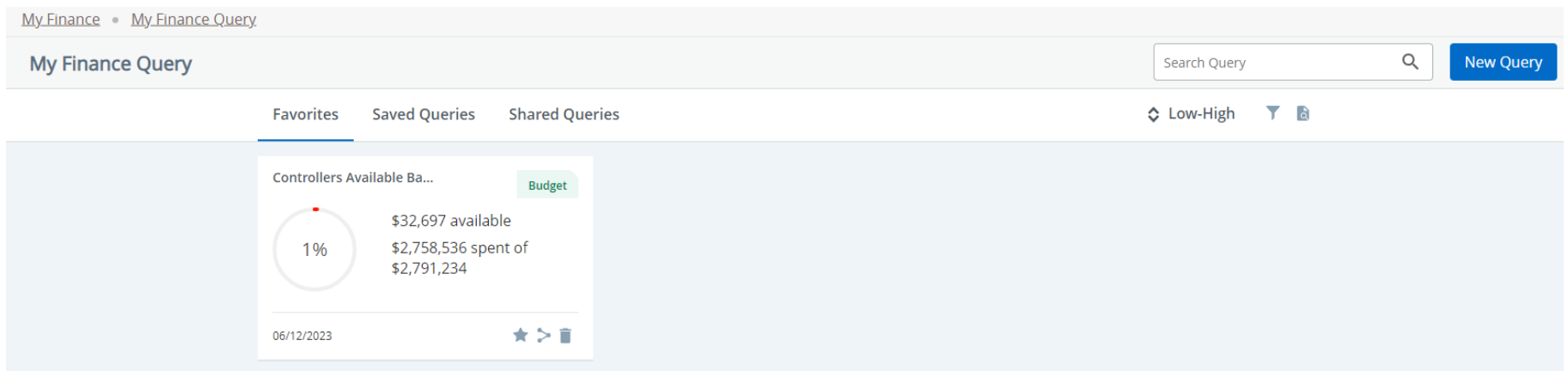
Save as

Controllers Available Balance

Set as favorite

CANCEL SAVE

- The next time you return to your home screen, your remaining budget and what you have spent will be displayed on your Dashboard automatically.



- Double click on tile to return to see the detail.

# Questions?

- General Accounting - [busfin\\_generalaccounting@emich.edu](mailto:busfin_generalaccounting@emich.edu)
- Purchasing - [busfin\\_purchasing@emich.edu](mailto:busfin_purchasing@emich.edu)
- Budget Office - [kamore@emich.edu](mailto:kamore@emich.edu)