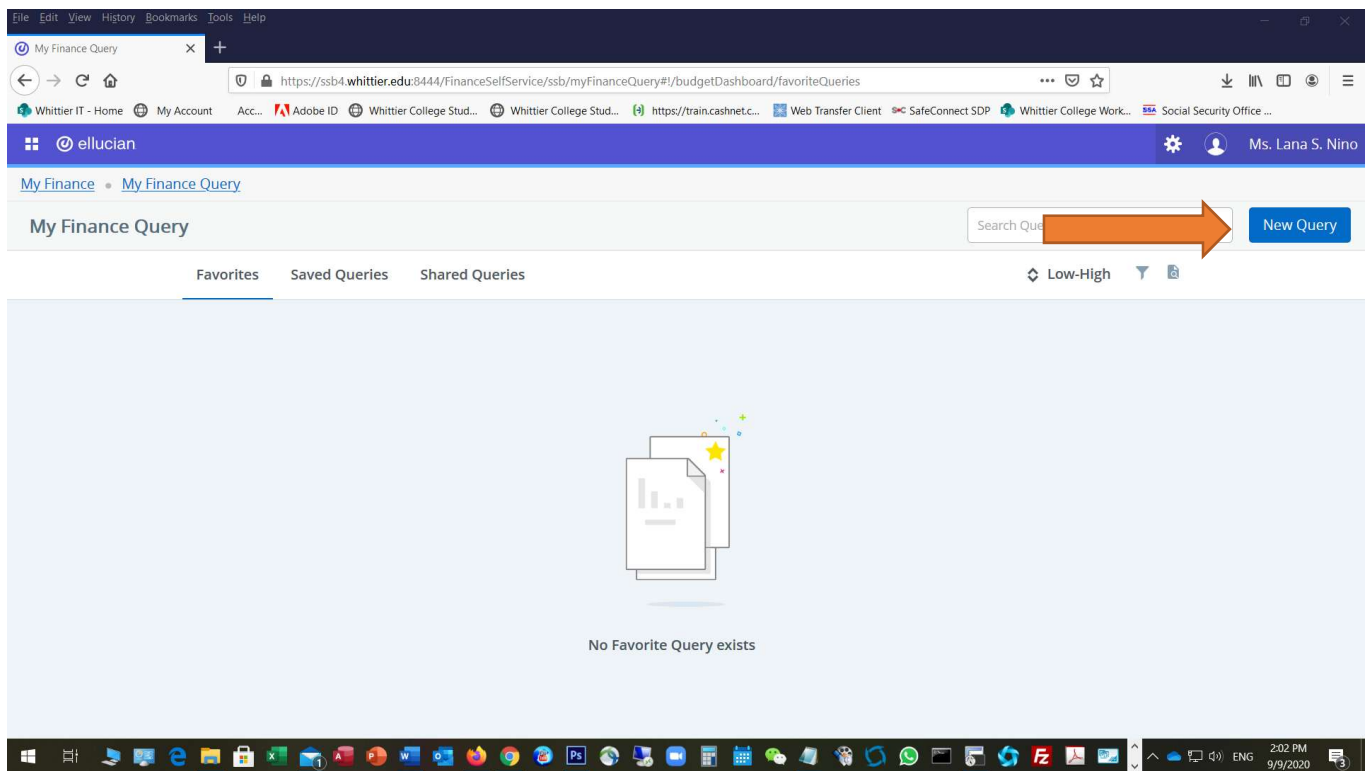


My Finance Budget Query Guide

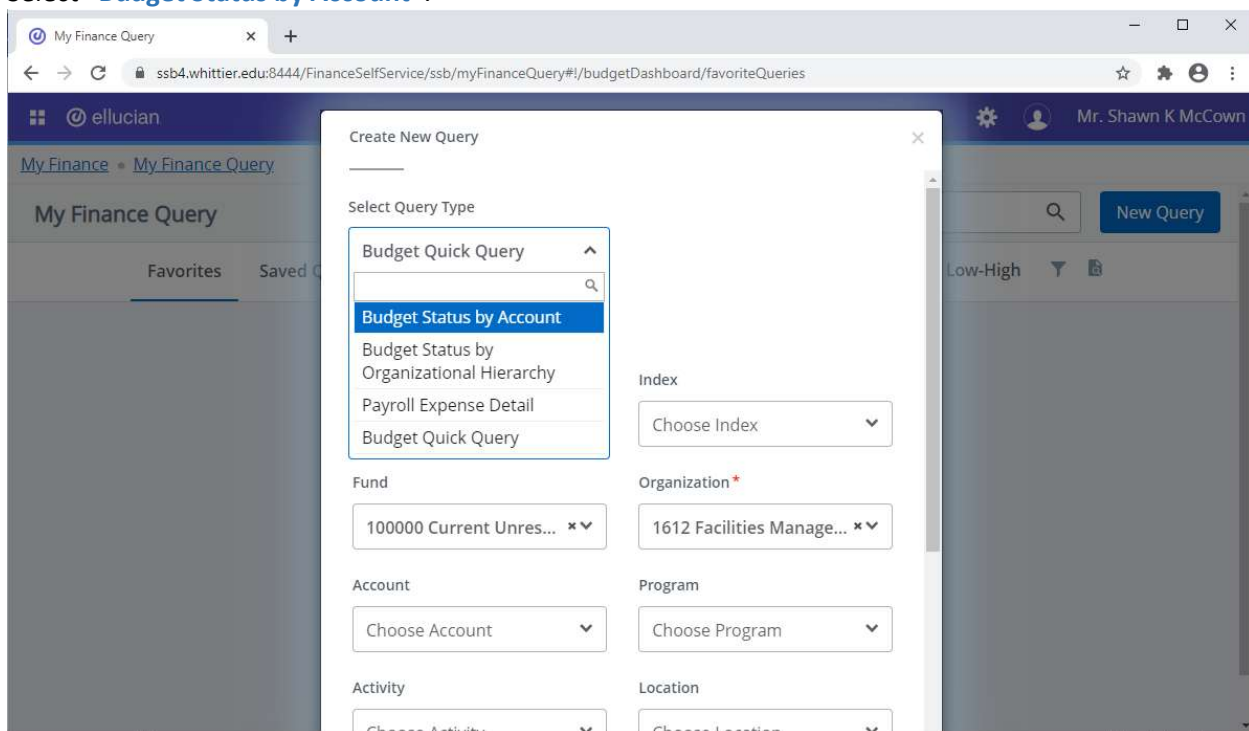
1	Login to your MyWhittier account portal.
2	Locate Finance Resources Card under Reporting menu. The card can be saved to your Home page by clicking the save icon 
3	Under the “My Finance Query” section, click “My Finance Query” from the options available: My Finance Query 1. My Finance Query 2. My Finance Query PDF Instructions 3. My Finance Query Video Guide
4	Alternatively, you can also access “My Finance Query” using the following direct link: https://ssb4.whittier.edu:8444/FinanceSelfService/. You can save it as bookmark for easy access.
5	From the “My Finance” dashboard, select “My Finance Query”: My Finance Hello  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. View Document View draft, pending and completed documents with related information and approval history.

- 6 Click the **"New Query"** button located in the upper right corner of the page:



- 7 Under Select Query Type, **Budget Status by Account** allows you to review budget information for specified Fiscal Period and Year; Specific FUND values; Specific Organization (ORGN) values; Specific Account (ACCT) values; and, include or exclude Revenue Accounts.

Select **"Budget Status by Account"**:



- 8 **Operating Budget Query:** Mimic the following configuration, varying where noted to tailor the results to your specific Operating ORGN (See panel)

My Finance Query

ssb4.whittier.edu:8444/FinanceSelfService/ssb/myFinanceQuery#/budgetDashboard/favoriteQueries

ellucian

Create New Query

1 Whittier College x v

Choose Index v

Fund

100000 Current Unres... x v

Organization*

1612 Facilities Manage... x v

Account

Choose Account v

Program

Choose Program v

Activity

Choose Activity v

Location

Choose Location v

Fund Type

Choose Fund Type v

Account Type

Choose Account Type v

Commitment Type

All v

☐ Include Revenue Accounts

Set all other fields as indicated on this screenshot. Scroll down to set Fiscal Year & Period, and to select Ledger Fields to include in the results

Vary the "Organization" to match the ORGN value for which you wish to retrieve Operating Budget financial information

- 9 Select the Operating Ledger Data columns to display on the report. Select only: **"Adjusted Budget"**; **"Year to Date"**; and, **"Available Balance"**.

Click **"SUBMIT"**:

My Finance Query

ssb4.whittier.edu:8444/FinanceSelfService/ssb/myFinanceQuery#/budgetDashboard/favoriteQueries

ellucian

My Finance Query

Favorites Saved

Create New Query

Fiscal Year*

2020 x v

Fiscal Period*

12 x v

Comparison Fiscal Year

None v

Comparison Fiscal Period

None v

Operating Ledger

☐ Adopted Budget ⓘ

☒ Year to Date ⓘ

☐ Budget Adjustment ⓘ

☐ Encumbrance ⓘ

☒ Adjusted Budget ⓘ

☐ Reservation ⓘ

☐ Temporary Budget ⓘ

☐ Commitments ⓘ

☐ Accounted Budget ⓘ

☒ Available Balance ⓘ

SUBMIT

Change "Fiscal Year" and "Fiscal Period" relative to the period through which you wish to retrieve Year-to-Date information

10 View the Query Results:

My Finance Query

ssb4.whittier.edu:8444/FinanceSelfService/ssb/myFinanceQuery#/budgetDashboard/accountQuery

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My Finance • My Finance Query • Budget Status by Account

Budget Status by Account New Query

Facilities Management - 1612

Query Results

Account	Account Title	FY20/PD12 Adjusted Budget	FY20/PD12 Year to Date	FY20/PD12 Available Balance
8115	Postage and Shipping	\$0.00	\$22.05	(\$22.05)
8156	Maintenance - Facilities	\$3,094,120.00	\$2,930,832.62	\$163,287.38
8171	Telephone	\$2,500.00	\$2,937.45	(\$437.45)
8250	Minor Equipment Under \$5000	\$0.00	\$197.08	(\$197.08)
Report Total (of all records)		\$3,096,620.00	\$2,933,989.20	\$162,630.80

11 View Transaction level detail:

My Finance Query

ssb4.whittier.edu:8444/FinanceSelfService/ssb/myFinanceQuery#/budgetDashboard/accountDocument/forAccount

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My Finance • My Finance Query • Budget Status by Account

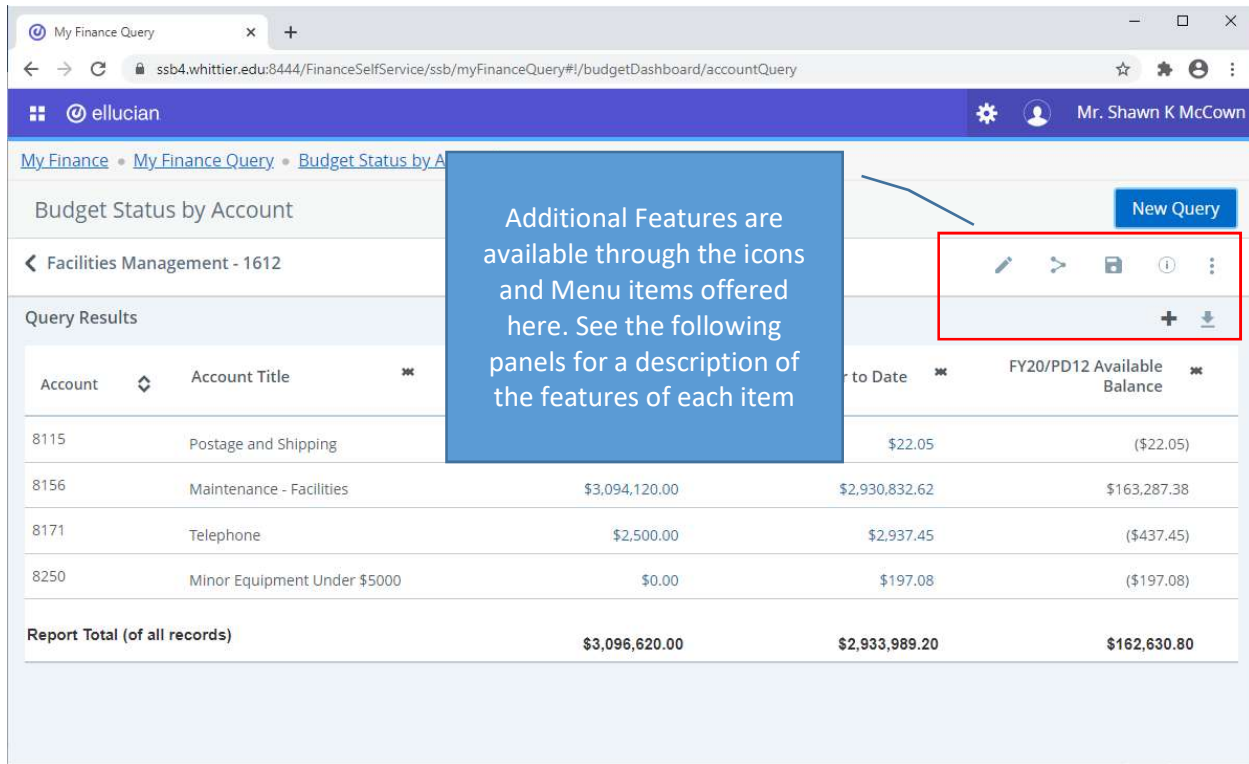
Budget Status by Account New Query

Facilities Management - 1612

Query Results

Transaction Date	Activity Date	Document Code	Vendor/Transaction Description	Amount	Rule Class Code
05/22/2020	05/22/2020	10377904 ⓘ	FlagShip	\$14,038.48	INNI
05/30/2020	06/04/2020	10378147 ⓘ	Facility Services Partners, Inc.	\$17,217.54	INNI
06/19/2020	06/19/2020	10378484 ⓘ	Facility Services Partners, Inc.	\$81,673.44	INNI
06/19/2020	06/19/2020	10378485 ⓘ	FlagShip	\$10,594.33	INNI
06/19/2020	06/19/2020	10378486 ⓘ	FlagShip	\$86,821.67	INNI
06/23/2020	06/23/2020	10378530 ⓘ	Facility Services Partners, Inc.	\$12,154.20	INNI
06/23/2020	06/23/2020	10378532 ⓘ	Sequoia Environmental	\$10,038.24	INNI

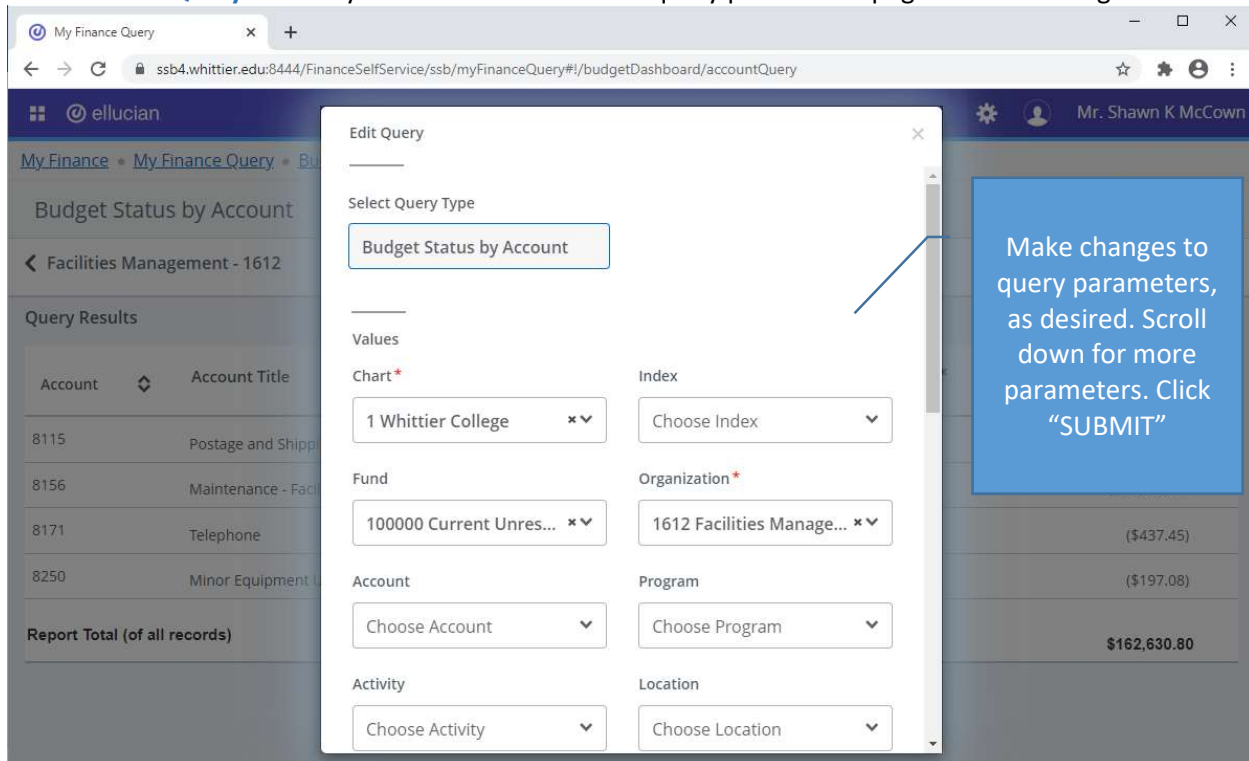
12 Icons and Menu Items:



Additional Features are available through the icons and Menu items offered here. See the following panels for a description of the features of each item

Account	Account Title	to Date	FY20/PD12 Available Balance
8115	Postage and Shipping	\$22.05	(\$22.05)
8156	Maintenance - Facilities	\$3,094,120.00	\$2,930,832.62
8171	Telephone	\$2,500.00	\$2,937.45
8250	Minor Equipment Under \$5000	\$0.00	\$197.08
Report Total (of all records)		\$3,096,620.00	\$2,933,989.20

13 "Edit Query" allows you to access the current query parameters page to make changes:



Make changes to query parameters, as desired. Scroll down for more parameters. Click "SUBMIT"

Chart*	Index
1 Whittier College	Choose Index

Fund	Organization*
100000 Current Unres...	1612 Facilities Manage...

Account	Program
Choose Account	Choose Program

Activity	Location
Choose Activity	Choose Location



"Save As" allows you to save the query parameters for later access:

The screenshot shows the 'Budget Status by Account' query results page. A 'Save as' dialog box is open, prompting the user to provide a name for the query. The dialog box contains a text input field with 'Budget Query' entered, a checkbox for 'Set as favorite', and 'CANCEL' and 'SAVE' buttons. A blue callout box points to the 'SAVE' button with the text: 'Provide a name for the query, then click "SAVE" (or, "CANCEL" to exit Save as)'. The background table shows account details and budget status.

Account	Account Title	2012 Year to Date	2012 Budget	2012 Actual
8115	Postage and Shipping			
8156	Maintenance - Facilities	\$2,933,989.20		
8171	Telephone			
8250	Minor Equipment Under \$5000	\$0.00		
Report Total (of all records)		\$3,096,620.00	\$2,933,989.20	\$162,630.80

The screenshot shows the 'My Finance Query' page with the 'Saved Queries' tab selected. A query titled 'Budget Query' is listed. A blue callout box points to the 'Budget' button on the query card with the text: 'After saving, the query will appear under the "Saved Queries" tab. Click the "Budget" button to access the query results page'. The query card displays a progress indicator (5%) and budget details.

Query Name	Status	Created	Actions
Budget Query	5%	07/21/2020	Budget



"Share Query" allows you to share the query with other authorized users:

My Finance Query

ssb4.whittier.edu:8444/FinanceSelfService/ssb/myFinanceQuery#/budgetDashboard/accountQuery

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My Finance • My Finance Query • Budget Status by Account

Budget Status by Account

Do you want to share this query?

No Yes

Facilities Management - 1612

Query Results

Account	Account Title	FY20/PD12 Adjusted Budget	FY20/PD12 Year to Date	FY20/PD12 Available Balance
8115	Postage and Shipping	\$0.00	\$22.05	(\$22.05)
8156	Maintenance - Facilities	\$3,094,120.00	\$2,930,832.62	\$163,287.38
8171	Telephone	\$2,500.00	\$2,937.45	(\$437.45)
8250	Minor Equipment Under \$5000	\$0.00	\$197.08	(\$197.08)
Report Total (of all records)		\$3,096,620.00	\$2,933,989.20	\$162,630.80

My Finance Query

ssb4.whittier.edu:8444/FinanceSelfService/ssb/myFinanceQuery#/budgetDashboard/accountQuery

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My Finance • My Finance Query • Budget Status by Account

Budget Status by Account

New Query

Budget Query

The icon shape will change to indicate it is shared

Query Results

Account	Account Title	FY20/PD12 Adjusted Budget	FY20/PD12 Year to Date	FY20/PD12 Available Balance
8115	Postage and Shipping	\$0.00	\$22.05	(\$22.05)
8156	Maintenance - Facilities	\$3,094,120.00	\$2,930,832.62	\$163,287.38
8171	Telephone	\$2,500.00	\$2,937.45	(\$437.45)
8250	Minor Equipment Under \$5000	\$0.00	\$197.08	(\$197.08)
Report Total (of all records)		\$3,096,620.00	\$2,933,989.20	\$162,630.80

My Finance Query

ssb4.whittier.edu:8444/FinanceSelfService/ssb/myFinanceQuery#/budgetDashboard/sharedQueries

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My Finance • My Finance Query

Search Query New Query

Favorites Saved Queries Shared Queries

Query Name	Query Type	Cha	ate
1102	Budget	1	7/2016
1104 Shannon	Budget	1	0/2015
1554	Budget	1	2/2018
1564	Budget	1	2/2018
1579 by acct	Budget	1	06/16/2010
1579-Research	Budget	1	02/02/2018

After sharing, the query will appear under the "Shared Queries" tab. Click the "Budget" button to access the query results page

16

My Finance Query

ssb4.whittier.edu:8444/FinanceSelfService/ssb/myFinanceQuery#/budgetDashboard/accountQuery

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My Finance • My Finance Query • Budget Status by A

Budget Status by Account

Budget Query

Query Results

Account	Account Title
8115	Postage and Shipping
8156	Maintenance - Facilities
8171	Telephone
8250	Minor Equipment Under \$5000
Report Total (of all records)	

OK

“View Parameters” allows you to view the current query parameters (but not edit):

Scroll down to see other parameters. Click “OK” to return to the query results

"View More" allows access to more features: only "View Pending Documents" is functional

My Finance Query

ssb4.whittier.edu:8444/FinanceSelfService/ssb/myFinanceQuery#/budgetDashboard/accountQuery

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My Finance • My Finance Query • Budget Status by Account

Budget Status by Account [New Query](#)

< Budget Query

Query Results

Account Account Title

8115 Postage and Shipping \$22.05 (\$22.05)

8156 Maintenance - Facilities \$2,930,832.62 \$163,287.38

8171 Telephone \$2,937.45 (\$437.45)

8250 Minor Equipment Under \$5000 \$0.00 \$197.08 (\$197.08)

Report Total (of all records) \$3,096,620.00 \$2,933,989.20 \$162,630.80

Use the "View pending documents" item to display unposted documents in process that are excluded from the Budget Status Report.

View Available Balance

View pending documents

View payroll

My Finance Query

ssb4.whittier.edu:8444/FinanceSelfService/ssb/myFinanceQuery#/budgetDashboard/pendingDocuments

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My Finance • My Finance Query • Pending Documents

Pending Documents [New Query](#)

< Budget Query

Query Results

Document Code Transaction Date Activity Date Status Fund Organization Account

J0046138 05/31/2020 06/10/2020 Incomplete 100000 1612 8115

J0046214 05/31/2020 07/09/2020 Incomplete 100000 1612 8171

J0046222 06/30/2020 07/09/2020 Incomplete 100000 1612 8171

Report Total (of all records)

“Download” allows you to download the query results to Excel:

My Finance Query

ssb4.whittier.edu:8444/FinanceSelfService/ssb/myFinanceQuery#/budgetDashboard/accountQuery

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My Finance • My Finance Query • Budget Status by Account

Budget Status by Account New Query

Budget Query

Query Results

Account	Account Title	FY20/PD12 Adjusted Budget	FY20/PD12 Year to Date	FY20/PD12 Available Balance
8115	Postage and Shipping		\$22.05	(\$22.05)
8156	Maintenance - Facilities		\$2,930,832.62	\$163,287.38
8171	Telephone		\$2,937.45	(\$437.45)
8250	Minor Equipment Under \$5000		\$197.08	(\$197.08)
Report Total (of all records)			\$2,933,989.20	\$162,630.80

https://ssb4.whittier.edu:8444/FinanceSelfService/ssb/budgetQueryByA...

Budget_Status_By_...xls

Show all

Budget_Status_By_Account (3).xls [Protected View] - Excel

File Home Insert Page Layout Formulas Data Review View Add-Ins Acrobat Tell me what you want to do...

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

B1 Budget Status by Account

Account	Account Title	Internal Account Type	Internal Account Type Title	FY20/PD12 Adjusted Budget	FY20/PD12 Year to Date	FY20/PD12 Available Balance
8115	Postage and Shipping	70	Student Financial Aid	0.00	22.05	-22.05
8156	Maintenance - Facilities	70	Student Financial Aid	3,094,120.00	2,930,832.62	163,287.38
8171	Telephone	70	Student Financial Aid	2,500.00	2,937.45	-437.45
8250	Minor Equipment Under \$5000	70	Student Financial Aid	0.00	197.08	-197.08
Report Total (of all records)				3,096,620.00	2,933,989.20	162,630.80

Budget Status by Account1595382

My Finance Query

ssb4.whittier.edu:8444/FinanceSelfService/ssb/myFinanceQuery#/budgetDashboard/accountQuery

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Mr. Shawn K McCown

My Finance • My Finance Query • Budget Status by Account

Budget Status by Account

New Query

Budget Query

Query Results

Account	Account Title	PD12 Year to Date	FY20/PD12 Available Balance
8115	Postage and Shipping	\$22.05	(\$22.05)
8156	Maintenance - Facilities	\$2,930,832.62	\$163,287.38
8171	Telephone	\$2,937.45	(\$437.45)
8250	Minor Equipment Under \$5000	\$197.08	(\$197.08)
Report Total (of all records)		\$3,096,620.00	\$162,630.80

Use the "breadcrumbs" to navigate back to the My Finance Query and My Finance pages

N O P **Non-Operating Fund Budget Query:** For Non-Operating "Restricted" Funds (Not 100000), mimic the following configuration, varying where noted to tailor the results to your specific Non-Operating FUND:

My Finance Query

ssb4.whittier.edu:8444/FinanceSelfService/ssb/myFinanceQuery#/budgetDashboard/favoriteQueries

ellucian

Mr. Shawn K McCown

My Finance • My Finance Query

My Finance Query

Favorites Saved

Create New Query

Select Query Type

Budget Status by Account

Values

Chart *

1 Whittier College

Index

Choose Index

Fund

426300 Groce Admissi...

Organization *

%

Account

Choose Account

Program

Choose Program

Activity

Choose Activity

Location

Choose Location

Vary the "Fund" to match the FUND value for which you wish to retrieve Budget and financial information. Use the "%" Wildcard in the "Organization" field

My Finance Query

ssb4.whittier.edu:8444/FinanceSelfService/ssb/myFinanceQuery#/budgetDashboard/favoriteQueries

ellucian

My Finance • My Finance Query

My Finance Query

Favorites Saved

Create New Query

Activity: Choose Activity

Location: Choose Location

Account Type: Choose Account Type

☒ Include Revenue Accounts

Fiscal Year: 2020

Fiscal Period: 12

Comparison Fiscal Year: None

Comparison Fiscal Period: None

Change "Fiscal Year" and "Fiscal Period" relative to the period through which you wish to retrieve Year-to-Date information

Select the "Include Revenue Accounts" option.

My Finance Query

ssb4.whittier.edu:8444/FinanceSelfService/ssb/myFinanceQuery#/budgetDashboard/favoriteQueries

ellucian

My Finance • My Finance Query

My Finance Query

Favorites Saved

Create New Query

Fiscal Year: 2020

Fiscal Period: 12

Comparison Fiscal Year: None

Operating Ledger

☐ Adopted Budget

☐ Budget Adjustment

☒ Adjusted Budget

☐ Temporary Budget

☐ Accounted Budget

☒ Year to Date

☐ Encumbrance

☐ Reservation

☐ Commitments

☒ Available Balance

SUBMIT

Select the ledger fields as indicated. Click "SUBMIT"

View the Query Results:

The screenshot shows a web browser window with the URL `ssb4.whittier.edu:8444/FinanceSelfService/ssb/myFinanceQuery#/budgetDashboard/accountQuery`. The user is logged in as Mr. Shawn K McCown. The page title is "Budget Status by Account". A "New Query" button is visible in the top right. The "Query Results" section displays a table with the following data:

Account	Account Title	FY20/PD12 Adjusted Budget	FY20/PD12 Year to Date	FY20/PD1 Availabl Balance
600BBF	Budget Balance Funds	(\$13.09)	\$0.00	(\$13.09)
Report Total (of all records)		(\$13.09)	\$0.00	(\$13.09)