

Instructions for navigating MyPortal - Financial Management Budget to Actual Report

Report for Departmental Budget activity of current year Revenue and Expenditures. This report does not include the fund balance object (#3XXXX) For research and trust accounts with fund balance account please use the Finance Query Report.

If you are connecting to the colleague system from on campus please go directly to the next slide.

If you are connecting from off campus you must first initialize a connection to the VPN. If you are unfamiliar with this process go to the link below:

<https://www.lakeheadu.ca/faculty-and-staff/departments/services/helpdesk/software/virtual-private-network>

1. Login to MyInfo

From the drop down menu select MyInfo



2. Log in using your Ellucian Credentials. Ex: rsmith



Lakehead University

Username*

rsmith|

Password*

.....

[Recover my account](#)

LOGIN

Once in MyInfo select **My Budgets** under the Popular Resources Section. You can also find it by selecting Employee on the list to the left side of the screen.

The screenshot displays a web browser window with the URL <https://erpwp.lakeheadu.ca>. The browser's address bar and tabs are visible at the top. The main content area is divided into two columns. The left column features a dark blue sidebar and a large white box labeled "Announcements". The right column contains a light blue box with a survey link and a "Popular Resources" section. In this section, the link "My Budget" is circled in blue. Other links in the "Popular Resources" section include "My Pay Stub", "Log in to myTimecard (for employees)", "Class Roster (Previous)", "Student Transcripts (for employees)", and "Enrolment Management".

by an independent third party Metrics@Work anonymously.
Click here for more information on the Employee Experience Survey >

Popular Resources

- [My Pay Stub](#)
- [My Budget](#)
- [Log in to myTimecard \(for employees\)](#)
- [Class Roster \(Previous\)](#)
- [Student Transcripts \(for employees\)](#)
- [Enrolment Management](#)



Hello, Welcome to your myPortal!

Choose a category to get started.



Student Finance

Here you can view your latest statement and make a payment online.



Tax Information

Here you can change your consent for e-delivery of tax information.



Employee

Here you can view your tax form consents, earnings statements, banking information, timecards and leave balances.



Financial Management

Here you can view the financial health of your cost centers and your projects.



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[Daily Work](#) • [Financial Management](#) • Financial Management Overview



Financial Management Overview



Budget to Actuals

Here you can view the financial health of your cost centers.



Budget to Actuals

My Cost Centers Object View

Filter

Location

Location value or range

Fund

Fund value or range

Cost.centre

Cost.centre value or range

Object

Include Active Accounts with No Activity

☒ Yes

Apply Filter

Reset Filter Save Criteria

Location – 11 - Thunder Bay

22 - Orillia

25 - LU/Georgian

Fund – 10 - Operating

13 - Strategic

15 - Ancillary

40 -Trust

50 - Research

Cost.centre – What code(s) do you have signing authority for? Example – 51200010

Object – Example - Supplies – 61220

You can enter multiple items separated with a comma.

Include Active Accounts with No activity – This will show all codes with \$0 budget \$0 expense. Click no to produce shorter report.

Budget to Actuals

Home

Centers

Object View

Filter

Location

11

Fund

10

Cost.centre

51200010

Object

61220

Include Active Accounts with No Activity

No

Apply Filter

TIP: If you don't know the specific criteria (ie location, fund, cost centre) you can select 'apply filter' to bring up all codes for which you have access only

A red arrow pointing from the right towards the 'Apply Filter' button at the bottom of the filter panel.

Budget to Actuals

My Cost Centers Object View

Filter



FY2023

Export

Saved Selection Criteria

Select a criteria

Set Default Criteria

Location

11

Fund

10

Cost centre

51200010

Object

61220

Include Active Accounts with No Activity

Apply Filter

Reset Filter

Save Criteria

Apply a filter to see the results.

You can select one of the criteria or all criteria for your selection.

Save the criteria to set up your report criteria for next time. Your saved criteria can be found under the Select a criteria so you can recreate the report.

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Daily Work • Financial Management • Budget to Actuals

Budget to Actuals

My Cost Centers Object View

Filter

FY2022 Export

Location Fund Cost centre Object Include Active Accounts with No Activity

Apply Filter Reset Filter Save Criteria

Apply a filter to see the results.

You can chose one of two views:
My Cost Centers (see next slide)
or
Object View (Slide immediately after)
– Looks more like view from MyBudgets
You can choose Year – 2022 current or any past year for historical information
You can also export the data to excel



Budget to Actuals

My Cost Centers

Object View

Filter



FY2022

Export

Location: 11 Fund: 10 Cost.centre: 51200010 Object: 61220 Hiding active accounts w/ no activity

Location

Location value or range



11

Fund

Fund value or range



10

Cost.centre

Cost.centre value or range



51200010

Object

Object value or range



61220

Cost Center

Budgeted
Expenses

Actuals and
Encumbrances

Remaining
Expenses

% Spent

Financial
Health

51200010 THUNDER BAY CAMPUS : OPERATING :
BUDGETING & ACCOUNTING

0 %



Budget to Actuals

My Cost CentersObject View

Filter

FY2022Export

Location: 11Fund: 10Cost.centre: 51200010Object: 61220Hiding active accounts w/ no activity

Location	Object	Budget	Actuals	Encumbrances	Remaining	% Received/ Spent	Financial Health
<div>Location value or range</div> <div>11</div>	Expense		\$0.00	\$0.00		0 %	✓
<div>Fund value or range</div> <div>10</div>							
<div>Cost.centre value or range</div> <div>51200010</div>							
<div>Object</div>							

Budget to Actuals

My Cost Centers

Object View

Filter

Location: 11 Fund: 50 Cost centre: 16091250

Saved Selection Criteria

Select a criteria

Set Default Criteria

Location

11 x

Fund

50 x

Cost centre

Cost centre value or range

16091250 x

Object

Object value or range

Include Active Accounts with No Activity

Apply Filter

Object View – lists the information from your filter by Revenue/Expense type

No data for the fiscal year selected.

No data for the fiscal year selected.

FY2023

Export

Object	Budget	Actuals	Encumbrances	Remaining	% Received/ Spent	Financial Health
✓ Fund Balance		\$0.00	\$0.00			
✓ Revenue	\$0.00	\$71,273.87	\$0.00	-\$71,273.87	101 %	
✓ Expense	\$0.00	\$34,269.83	\$20,567.30	-\$54,837.13	101 %	
Net Revenue - Expense	\$0.00	\$37,004.04				

Budget to Actuals

My Cost Centers **Object View**

Filter

FY2023

Export

Location: 11 Fund: 50 Cost centre: 16091250

Saved Selection Criteria

Select a criteria

Set Default Criteria

Location

11 x

Fund

50 x

Cost centre

Cost centre value or range

16091250 x

Object

Object value or range

Include Active Accounts with No Activity

Apply Filter

Object	Budget	Actuals	Encumbrances	Remaining	% Received/ Spent	Financial Health
✓ Fund Balance		\$0.00	\$0.00			
✓ Revenue	\$0.00	\$71,273.87	\$0.00	-\$71,273.87	101 %	
Expense	\$0.00	\$34,269.83	\$20,567.30	-\$54,837.13	101 %	
✓ 50431 POSTDOCTORAL FELLOWSHIP	\$0.00	\$33,515.65	\$20,109.42	-\$53,625.07	101 %	
✓ 50437 POSTDOCTORAL FELLOW BENEFITS	\$0.00	\$754.18	\$457.88	-\$1,212.06	101 %	
✓ 50438 POSTDOCTORAL FELLOW PENSION	\$0.00	\$0.00	\$0.00	\$0.00	0 %	✓
✓ 61100 LU PRINTING CHARGES	\$0.00	\$0.00	\$0.00	\$0.00	0 %	✓
✓ 61220 SUPPLIES CONSUMABLE	\$0.00	\$0.00	\$0.00	\$0.00	0 %	✓
✓ 61226 FURNITURE & EQUIPMENT < 5,000	\$0.00	\$0.00	\$0.00	\$0.00	0 %	✓
✓ 61227 COMPUTER EQUIPMENT < 5,000	\$0.00	\$0.00	\$0.00	\$0.00	0 %	✓
Net Revenue - Expense	\$0.00	\$37,004.04				

No data for the fiscal year selected. X

No data for the fiscal year selected. X