# Instructions for navigating MyPortal - Financial Management

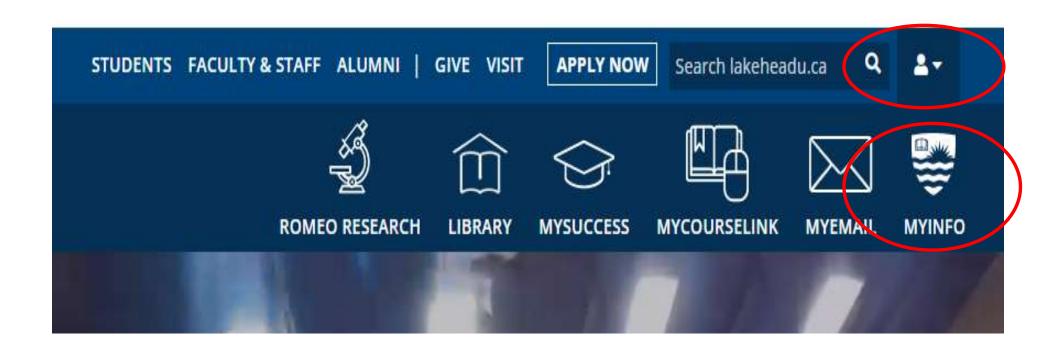
#### **Budget to Actual Report**

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

## 1. Login to MyInfo From the drop down menu select MyInfo



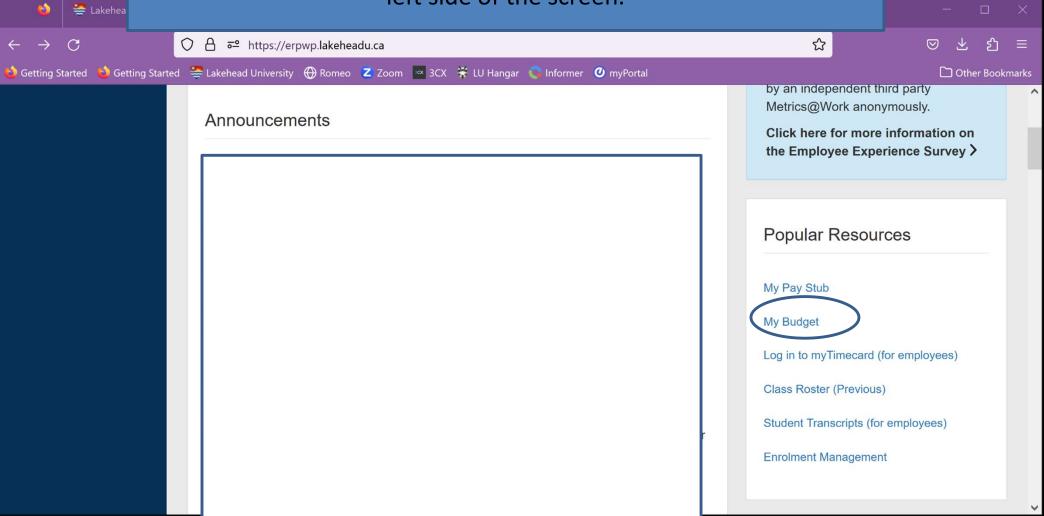
### 2. Log in using your Ellucian Credentials. Ex: rsmith

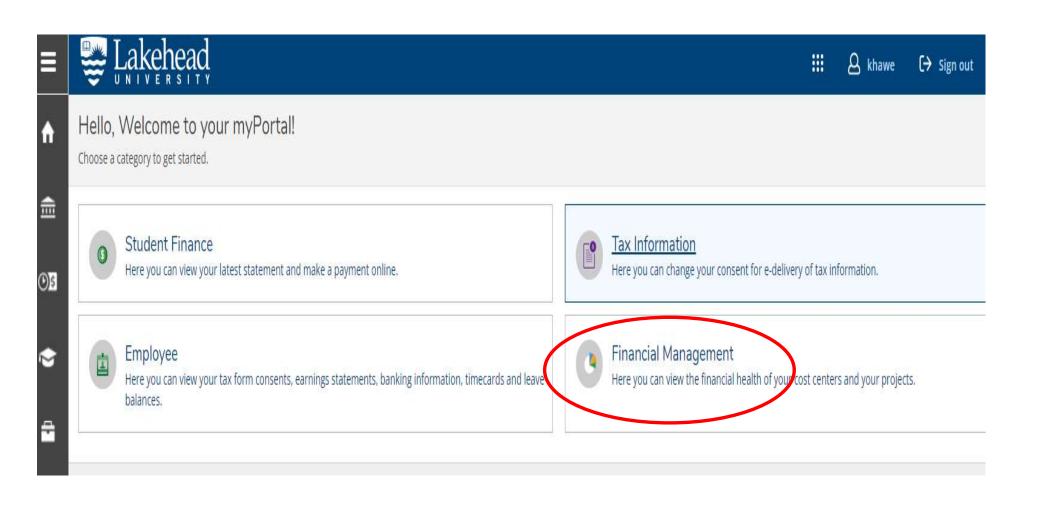


#### **Lakehead University**

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.







Daily Work

Financial Management •

Financial Management Overview

Financial Management Overview



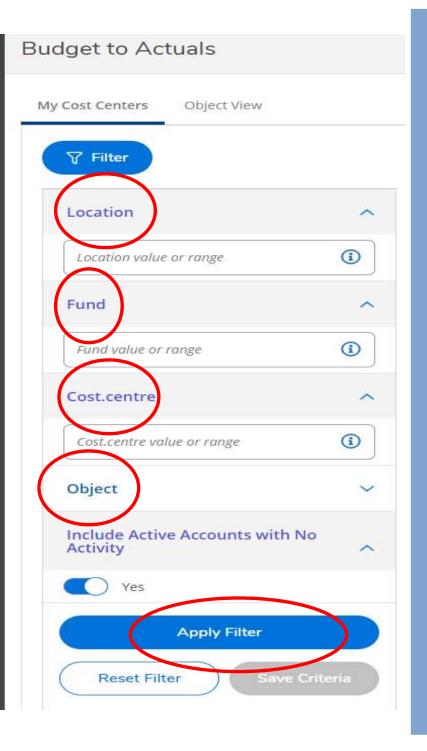
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Here you can view the financial health of your cost centers.





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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.

