

Instructions for navigating MyPortal - Financial Management Finance Query Report

For financial reporting of Research,
Endowed and Trust Accounts

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|

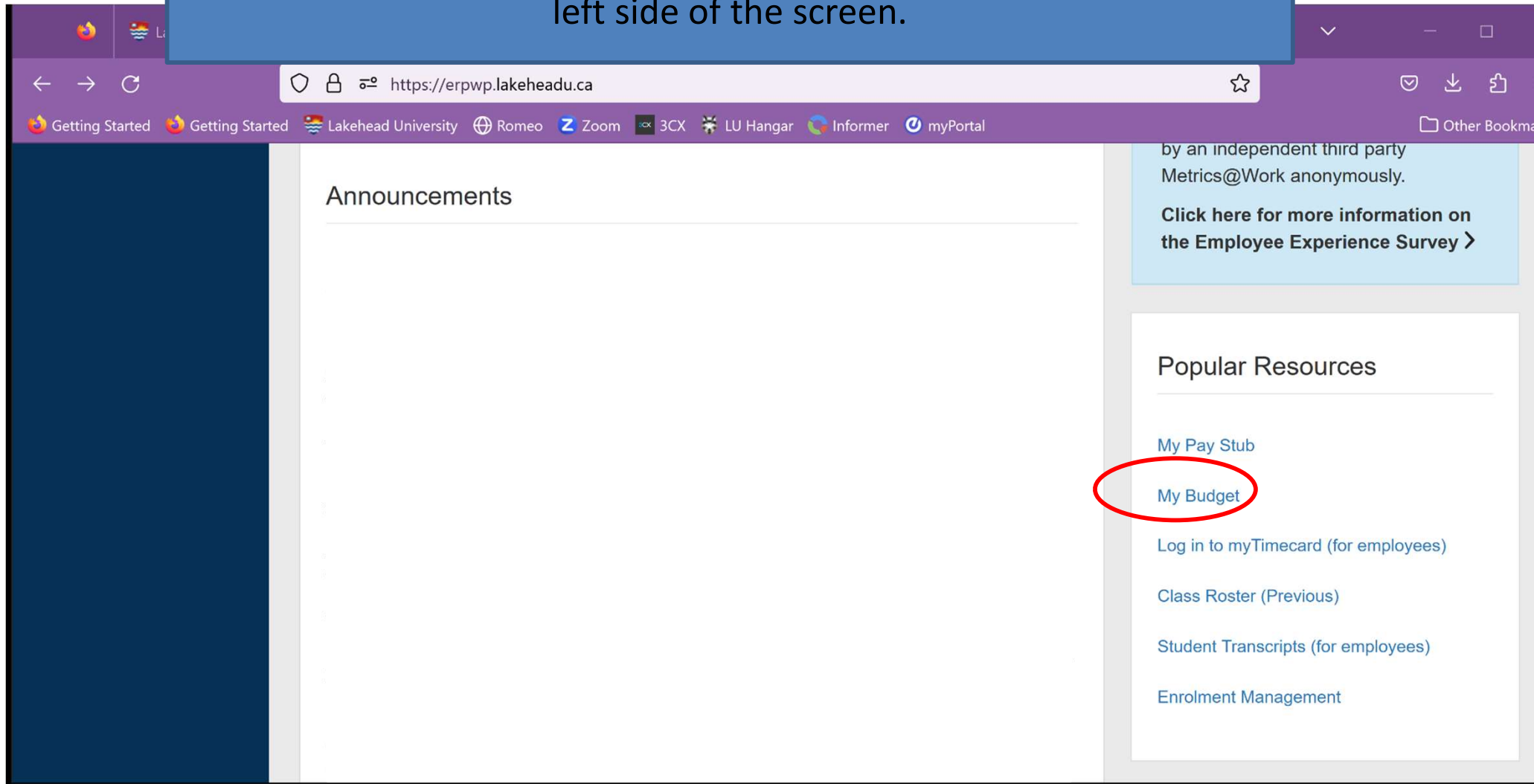
Password*

.....

[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.





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.



 mross  Sign out  Help


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

Financial Management Overview



Budget to Actuals

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



Finance Query

Here you can query your financial data.

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Use Finance Query for Research, Endowed and Trust accounts to see your full account details and the unspent balance

Use Budget to Actual report for your departmental or operating budget accounts

Home

Filter

Location: 25 Fund: 50

Location

Fund

Cost.centre

Object

Project

Sort Options

Sort By Subtotal

Cost.centre ☐ ☐

+ Add Sort

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. If you enter multiple cost.centres, you can sort by cost.centre and subtotal by cost.centre.

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

Finance Query

Filter

FY2023

Actuals Start Date

2022-05-01

Actuals End Date

2023-04-30

Export

Cost centre: 11153000 Hiding active accounts w/ no activity

Saved Selection Criteria

Select a criteria

Set Default Criteria

Location

Fund

Cost centre

15001234

Object

Project

Include Active Accounts with No Activity

No

Sort Options

GL Account	Budget	Actuals	Requisitions	Encumbrances	Remaining
25-50-15001234-39999 FUND BALANCE	\$0.00	-\$1,493.38	\$0.00	\$0.00	\$1,493.38
25-50-15001234-61805 INDEPENDENT CONTRACTOR	\$0.00	\$1,450.00	\$0.00	\$0.00	-\$1,450.00
Grand Total	\$0.00	-\$43.38	\$0.00	\$0.00	\$43.38



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Total: 2

You can select the information above to dig down to see the account details . For example: Select the line *Independent contractor* to see the transaction listing.