

In ulink, select the Purchasing and budget tab

https--webmail.zimbra.lo... Logon Mail - Arlene V Hoag - Ou...


# ULINK

**Employee**


- News & Events
- Purchasing & Budget**
- Time Entry
- Tutorials & Guides

## Employee COVID-19 Links


Visit [the University's COVID-19 Response website](#) for important updates and messages.



[Read the Return-to-Workplace Guide](#)



[Take the employee daily self-check](#)  
[Take the healthcare personnel daily self-check](#)



## Select My Finance Query

The screenshot shows the UBLINK application interface. On the left is a vertical navigation menu with the following items: Employee, News & Events, Purchasing & Budget (highlighted in red), Time Entry, and Tutorials & Guides. The main content area is divided into three columns. The first column contains 'Purchasing Contracts' (with a link 'View available contracts'), 'Purchasing Training' (with a link 'Requisition training'), and 'Purchasing' (with links: 'Requisition Entry', 'Instructions for How to Copy a Requisition', 'Requisition Approval Form in Banner 9 (FOAUAPP)', 'Vendor Query (FTMVEND)', 'View Document', 'Banner Document Management (BDM) Query', 'Banner Training Resources', and 'Chrome River Travel & Expense'). The second column contains 'Financial Resources' (with links: 'My Finance Query (Budget, Encumbrance & Payroll Queries and View Documents)', 'View Attachments in BDM (on-campus or VPN network access required)', and 'Approve Documents') and 'Financial Forms' (with links: 'Balance Sheet Summary', 'Summary of Revenue and Expenses', 'General Ledger Activity Search', 'Operating Ledger Activity Search', and 'Document Retrieval Inquiry'). A blue arrow points from the 'My Finance Query' link in the Financial Resources section to the 'My Finance Query' tile in the second screenshot.

OR

## My Finance



Hello Arlene,

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.



### 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.



### My Requisitions

Create and view draft, pending and completed requisitions and supporting documentation.

LOUISIANA

My Finance • My Finance Query


My Finance Query

Search Query

New Query

Favorites Saved Queries Shared Queries

Low-High



No Favorite Query exists

The image shows a web interface for 'My Finance Query'. At the top, there is a navigation bar with 'LOUISIANA' on the left, a settings gear, a user profile icon for 'Arlene V. Hoag', and a breadcrumb trail 'My Finance • My Finance Query'. Below this is a header section with the title 'My Finance Query', a search box labeled 'Search Query', and a blue 'New Query' button. A secondary navigation bar contains 'Favorites', 'Saved Queries', and 'Shared Queries', with 'Favorites' being the active tab. To the right of this bar is a 'Low-High' sorting indicator. The main content area is light blue and contains a central illustration of a document with a star and confetti, with the text 'No Favorite Query exists' below it. A blue arrow points from the bottom-left towards the top-right, passing through the 'New Query' button.

New query

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Select Query Type

Budget Status by Organization... ▼

---

Values

Chart \*

1 University of Louisiana, L... x ▼

Index

Choose Index ▼

Fund

Choose Fund ▼

Organization \*

Choose Organization ▼

Account

Choose Account ▼

Program

Choose Program ▼

Activity

Choose Activity ▼

Location

Choose Location ▼

Choose Budget Status by Organizational Hierarchy

Chart – 1

Enter fund (organization defaults) – don't select any other field

Activity

Choose Activity ▼

Location

Choose Location ▼

Fund Type

Choose Fund Type ▼

Account Type

Choose Account Type ▼

Commitment Type

All ▼

Include Revenue Accounts

---

Fiscal Year\*

2021 x ▼

Fiscal Period\*

14 x ▼

Comparison  
Fiscal Year

None ▼

Comparison  
Fiscal  
Period

None ▼

\*\*The new Self Service doesn't allow for the 70 account type. \*\*

Populate Fiscal year and fiscal period

Comparisons are none and none

## Operating Ledger

Adopted Budget ⓘ

Year to Date ⓘ

Budget Adjustment ⓘ

Encumbrance ⓘ

Adjusted Budget ⓘ

Reservation ⓘ

Temporary Budget ⓘ

Commitments ⓘ

Accounted Budget ⓘ

Available Balance ⓘ

SUBMIT

Selected check boxes and submit

Budget Status by Organizational Hierarchy New






< J&T Guilbeau History Instruction II - 707863 🔍 ➤ 🔒 ⌂

Query Results

Organization	Organization Title	Health	FY20/PD14 Adjusted Budget	FY20/PD14 Year to Date	FY20/PD14 Encumbrances	FY20/PD14 Available Balance
707863	J&T Guilbeau History Instruction II	⚠️	\$4,500.00	\$4,450.00	\$0.00	\$50.00
Report Total (of all records)			\$4,500.00	\$4,450.00	\$0.00	\$50.00

Select your organization to see the detail

## Query Results

Account Type 	Account Type Title 	Health 
60	Labor	
70	Direct Expenditures	
<b>Report Total (of all records)</b>		

The detail for 70 is your discretionary budget/activity. All professorships and chairs are budgeted as 71 for carryover and 72 for current year discretionary.

If you hire students, GA's etc, you will need to reduce the balance available in the Account type 70 by the applicable charges showing in 60.

To save your query

Make sure your query is showing the organization only. (Like the old self service, once you drill down, it remembers the settings for the next time.)

The screenshot shows a web application interface for 'LOUISIANA'. The breadcrumb trail is 'My Finance > My Finance Query > Budget Status by Organizational Hierarchy'. The page title is 'Budget Status by Organizational Hierarchy' with a 'New Query' button. The current view is 'J&T Guilbeau History Instruction II - 707863'. The 'Query Results' section contains a table with the following data:

Organization	Organization Title	Health	FY21/PD14 Adjusted Budget	FY21/PD14 Year to Date
707863	J&T Guilbeau History Instruction II		\$5,950.00	\$0.00
Report Total (of all records)			\$5,950.00	\$0.00

A blue arrow points from the bottom left towards a save icon (a blue square with a white document symbol) located in the top right corner of the table area, next to the breadcrumb trail.


Name it





To pull up a balance for a saved query on a fund


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Select My Finance Query

LOUISIANA Arlene V. Hoag


My Finance • My Finance Query

### My Finance Query

Favorites **Saved Queries** Shared Queries

Low-High



No Favorite Query exists

Select Saved Queries

The screenshot shows a web interface for "My Finance Query" under the "LOUISIANA" header. The user is identified as "Arlene V. Hoag". The interface includes a search bar and a "New Query" button. Below the search bar are tabs for "Favorites", "Saved Queries", and "Shared Queries". A "Low-High" filter is also visible. The main content area displays a budget card for organization "707863". The card shows a "100%" completion status, "\$5,950 available", and "\$0 spent of \$5,950". The date "04/28/2021" and some action icons are at the bottom of the card. A blue arrow points to the "100%" text.

Select your query

Select the organization

Select 70