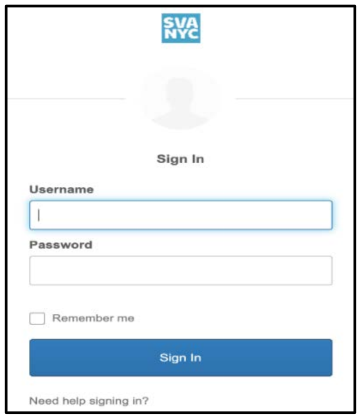
[MyServices Web Budget]

MyServices Web Budget allows you to view information about the departmental operational and instructional budgets, including details on requisitions, encumbrances, actuals, and available funds for which you have access. MyServices replaces WebAdvisor Web Budget.

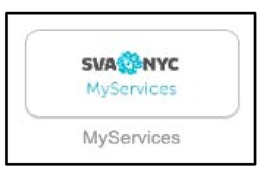
Access your **myID** account at [https://myid.sva.edu].



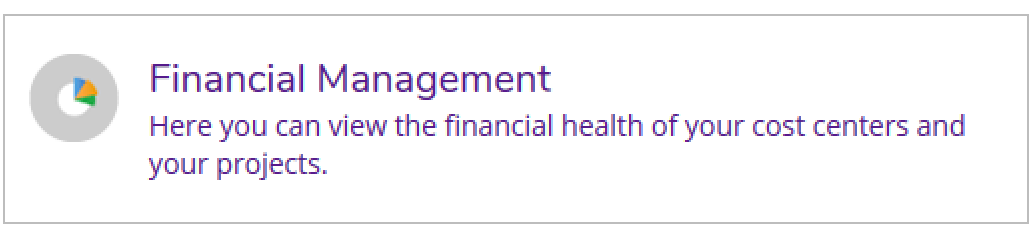
Enter your username and password, then click **Sign In**.

If you encounter difficulty logging in, visit support.sva.edu or contact the Help Desk at helpdesk@sva.edu or 212.592.2400.

Once you are logged in, select the **MyServices** icon from your list of apps.

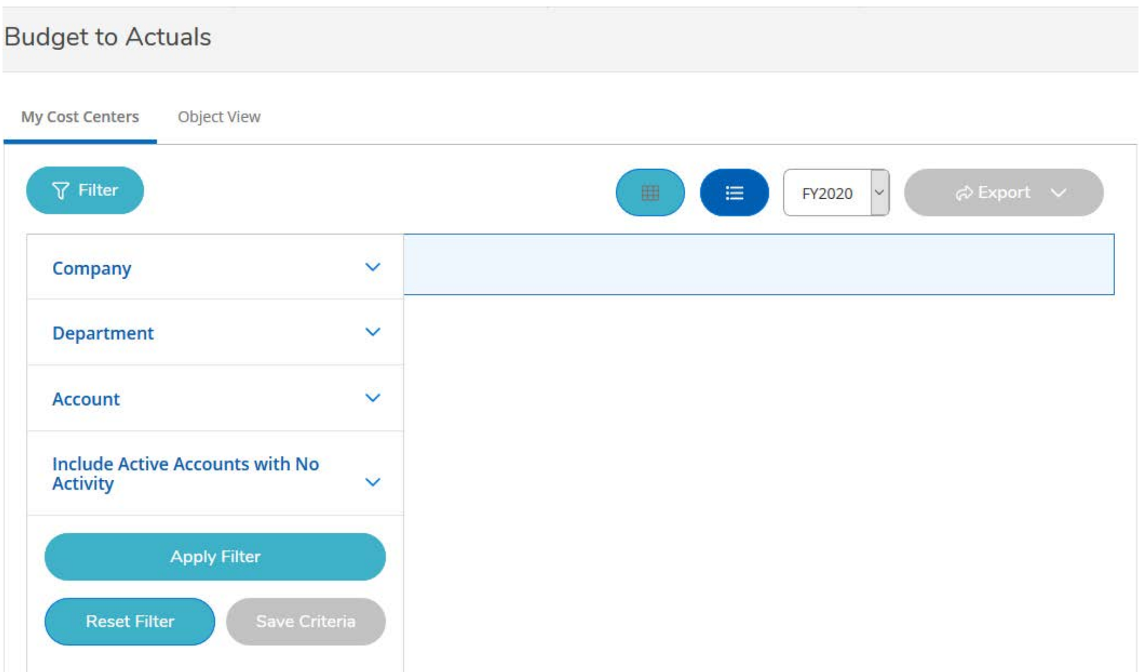


Select the **Financial Management** from the homepage.



From the **Financial Management Overview** page, click **Budget to Actuals**.

Budget to Actuals Page:



Fiscal Year - Select a fiscal year from the drop-down menu FY2021

Company – Click the icon and enter 1 for SVA or leave the company field empty

Department – Click the icon to enter the 6-digit department code or multiple department codes separated by commas

Account – Click the icon to enter the 7-digit account number or multiple accounts separated by commas

Include Active Accounts with No Activity – Click the icon to indicate whether to include accounts with no activity. Click the icon to toggle between "Yes" or "No." The default setting is "Yes."

To view all GL accounts in your department, enter department code(s) only.

To view individual GL accounts in your department, enter department code(s) and account number(s).

Note: you can view any GL accounts in operational and instructional ranges of a department code(s) defined in your GL security access.

Click Apply Filter to view the results.

To toggle between displaying or not displaying the filter area, click Filter

Click Reset Filter to clear the filter.

Click Save Criteria to save the selection criteria.

You can export the data to a .csv file by clicking the Export icon

To get more information, click the icon

My Cost Centers Tab

The **My Cost Centers** tab displays a list or bar graph of your Colleague assigned department numbers and description. You can switch between the two views by using the bar graph icon or the list icon.

Bar Graph View

For each department, there is a bar graph. Bar graphs appear in different colors to represent whether a budget is underspent, close to being spent or overspent.

If the expense part of a department has a budget, and there are no expense transactions, the bar graph appears empty.

- As expense transactions process, the bar graph will fill up with a green color
- After the expenses are over 85% of the budget, the bar graph will be yellow
- The bar graph will be red when the budget is overspent

Click on any number to get details.

List View

Cost Center: displays the department numbers and descriptions

Budgeted Expenses: displays the total amount budgeted

Actuals and Encumbrances: displays the total amount currently encumbered and the actuals

Remaining Expenses: displays the amount remaining

%Spent: displays the percentage amount spent

Financial Health: indicates whether a budget is underspent, close to being spent, or overspent

- budget is underspent
- budget is close to being spent
- budget is overspent

Click on the total number in any column to get details.

Object View Tab

Click the icon next to the Expense heading to see all the expense accounts

Click the icon next to each expense account to view the Budgeted, Requisitioned, Encumbered, and Actual amounts associated with each GL account number

Umbrella or Poolee:
If the account is designated as the umbrella account for a budget pool, a "U" is displayed next to the account.

If the account is designated as a poolee account for a budget pool, a "P" is displayed next to the account. Expense activity is tracked in the poolee accounts.

Clicking on a department number on the **My Cost Centers** tab will also display the *Budgeted*, *Requisitioned*, *Encumbered*, and *Actual* amounts associated with each GL account number.

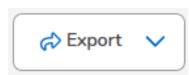
GL Account Transactions Page

You can access the GL Account Transactions page by clicking a *GL account number*.

The GL Account Transactions page displays GL transactions associated with the GL account number. The transactions are broken down by encumbrances, actuals, and budget.

Encumbrances display a list of the current purchase orders, requisitions, blanket purchase orders, encumbrance journal entries, and recurring vouchers.
Select an encumbrance document to view by clicking on the document number. If the document no longer exists, an error message is displayed.

Actuals display a list of the current actuals activity. If the actuals transaction is for a voucher, the voucher ID is displayed as a hyperlink in the Document field.
Click the voucher ID hyperlink to access the Voucher page. If the document no longer exists, an error message is displayed.

You can export the data to a .csv file by clicking the 

icon.

Voucher Page
It is accessed from the GL Account Transactions page by clicking a *voucher number*.
The Voucher page displays the associated documents, comments, approvers, and line item details for the voucher.

Requisition Page
It is accessed from the GL Account Transactions page by clicking a *requisition number*.
The Requisition page displays the associated documents, comments, approvers, and line item details for requisitions.

Journal Entry Page
It is accessed from the GL Account Transactions page by clicking a *journal entry number*.
The Journal Entry page displays the comments, approvers, and journal item details for journal entries.

Recurring Voucher Page
It is accessed from the GL Account Transactions page.
The Recurring Voucher page displays the comments, approvers, and journal item details for journal entries.