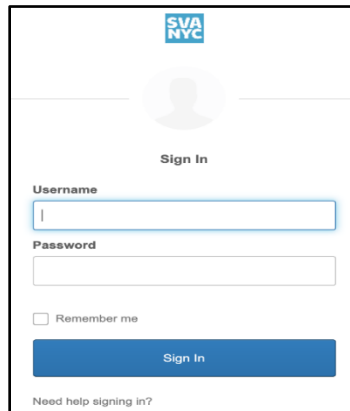


[MyServices Web Budget](#)

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>.



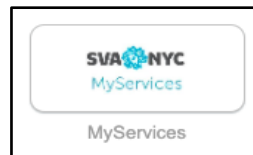
The screenshot shows the MyServices Sign In page. At the top is the SVA NYC logo. Below it is a placeholder for a user profile picture and the text "Sign In". The form contains two input fields: "Username" and "Password". Below the password field is a checkbox labeled "Remember me". A blue "Sign In" button is positioned below the checkbox. At the bottom of the form, there is a link that says "Need help signing in?".

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

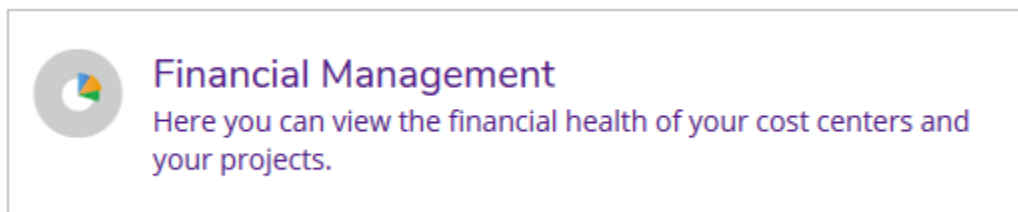


If you encounter difficulty logging in, visit support.sva.edu or contact the Help Desk at helpdesk@sva.edu or 212.592.2400.

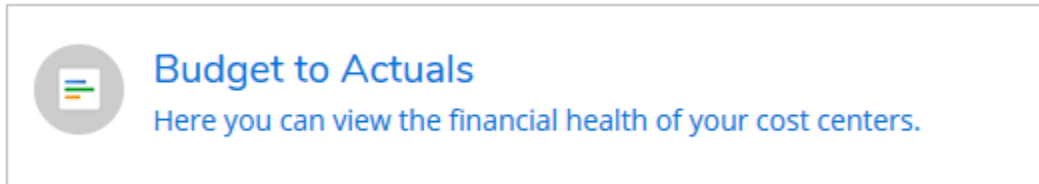
Once you are logged in, select the **MyServices** icon from your list of apps.



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



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





Budget to Actuals Page:

Budget to Actuals

My Cost Centers Object View

Filter



FY2020
Export

Company ▼

Department ▼

Account ▼

Include Active Accounts with No Activity ▼

Apply Filter


Reset Filter Save Criteria

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).

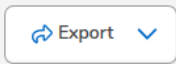
Note: you can view any GL accounts in operational and instructional ranges of a department code(s) defined in your GL security access.


Click  to view the results.

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



Click  to clear the filter.

Click  to save the selection criteria.

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

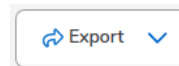
Encumbrances display a list of the current purchase orders, requisitions, blanket purchase orders, encumbrance journal entries, and recurring vouchers.

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.

You can also query your department financial data for any fiscal year and/or data range using **Finance Query**. It displays Budget, Actuals, Requisitions, Encumbrances, and Remaining budget. You can sort data to see the GL account totals, sub-totals, and grand totals with any filter combination. You can select and apply new and existing default filters.

This option allows export of detailed transactions.

From the **Financial Management Overview** page, click **Finance Query**.

Finance Query

Here you can query your financial data.

Click on Filter to open a filter panel

Finance Query

⌵ Filter

FY2024 ⌵

Actuals Start Date
7/1/2023
📅

Actuals End Date
6/30/2024
📅
ⓘ

Export ⌵

Company ⌵

Department ⌵

Account ⌵

Project ⌵

Include Active Accounts with No Activity ⌵

Sort Options ⌵

Apply Filter



Reset Filter

Save Criteria


ⓘ


Apply a filter to see Finance Query results.


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



Actuals Start Date	Actuals End Date ⓘ
7/1/2023 	6/30/2024 

Actuals Start and End Dates – define the data range for actuals

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

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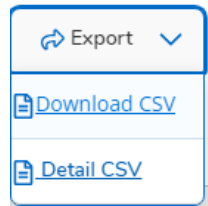
Note: you can view any GL accounts in operational and instructional ranges of a department code(s) defined in your GL security access.

Click  to view the results.

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


Click  to clear the filter.

Click  to save the selection criteria.



You can export the data to a .csv file using **Export**

You can use **Detail CSV** if you are looking to download detailed transactions at once.

To get more information, click the icon 

Debits show as positive numbers and credits show as negative numbers.

Click on the amount to drill in to see details.

For more information about these pages, see Budgets to Actuals above.