

MyFunds

Overview

MyFunds is an online tool which allows you to view an up-to-date budget report of the balances and expenses for your funds. It is an efficient method to view all of your funds at a glance, and also allows for drill down capabilities to view details on expenditures. It also provides a few options to tailor how much information you want in your reports. The instructions below provide further guidance on how to access and read the basic budget report.

MyFunds Access

MyFunds is available online from <http://blink.ucsd.edu> under the Business Tools tab, or you can access directly at <http://myfunds.ucsd.edu>.

You will be prompted to log in using your **Single Sign On** account, which is typically your UCSD email address. If you do not have a log in, you follow the Self-Registration steps by clicking on "New User?".

Click on the – **View Reports Set Up for Me.**

You will see your Faculty Allowance and other funds that are set up for you to view.

View the summary report

- The first few columns contain the **financial entities**. These will vary depending on how the report profile was set up.
- The next column is the **financial entity title** (fund, index, project, or organization).
- The next four columns are **Allocation, Expense, Lien, and Balance**.
- The next two columns, **Projection and Proj. Bal.**, display only if projections or transactions were selected when the report profile was created.
- Click on the **financial entity** to drill down to the financial entity report.
- Click on any **balance (in blue)** to drill down to the sub-account summary screen.

- Click on any balance in the **sub-account summary** screen to drill down to the sub-account detail screens. This will give you a description of each allocation or expense.

- Helpful pages for PIs:
 - [Introduction to MyFunds](#) (Includes a demo of the application)
 - [How to Read the Summary Report](#)

Contact Susan Taniguchi at staniguchi@ucsd.edu or Tanya Pohlson at tpohlson@ucsd.edu for questions regarding your report.