

WebAdvisor – Budget Information

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An Employee menu option has been added to WebAdvisor. This choice allows Budget Managers and their designees to obtain information regarding the budgets for which they are responsible.

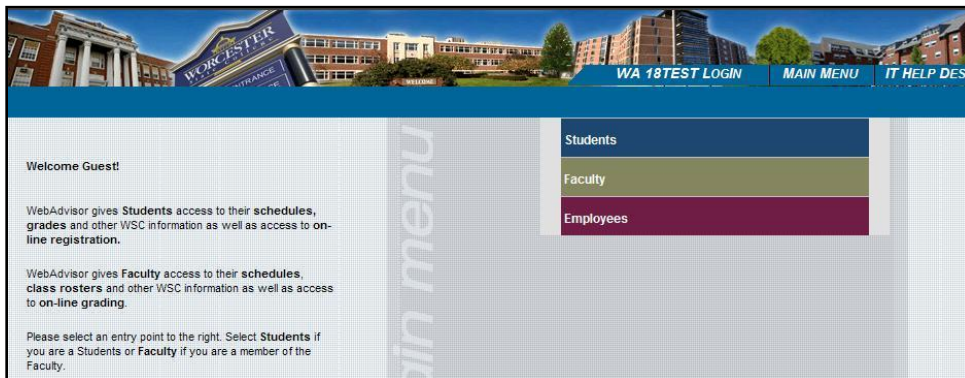
Log into WebAdvisor

1. Log into the WSC Community System by going to **http://community.worcester.edu**.
2. Under Login Here, enter your **WSC Username** and **Password** and press **<Enter>**.
3. When the Security Alert displays, click **<Enter>**

The Fac/Staff WebAdvisor module should appear on the lower left of the Community System screen.

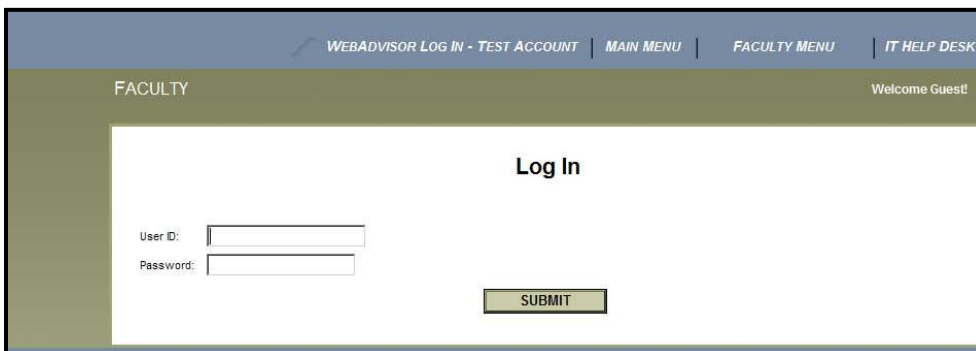
4. Click the link titled **Click Here for Faculty** (or Student) **menu**.

This will bring you to the WebAdvisor Log In screen.



5. At the top of the screen, click **WEBADVISOR LOG IN**.

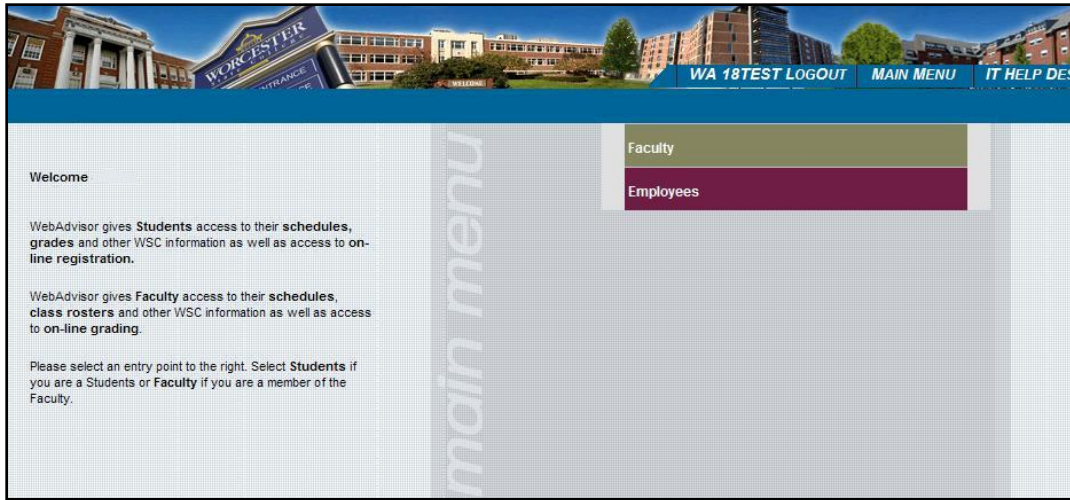
The WebAdvisor login screen displays.



Log into WebAdvisor

6. Enter your **WSC Username** and **Password** and click **SUBMIT**.

The WebAdvisor main menu screen displays.



7. Click the **Employees** option to gain access to Budget information of accounts for which you are responsible.

The Employees – WebAdvisor for Employees screen displays.



Budget Summary – This link displays information regarding all accounts to which the user has privileges.

If the user has privileges to quite a few accounts, the user may get “timed out” prior to informaiton being displayed when obtaining a Budget Summary. If so, it may be advantageous to obtain specific information using the Budget Selection option.

Budget selection – This link lets the user enter fund, unit, source, or object code criteria in order to obtain specific information.

Budget Summary

1. Click the **Budget summary** link.

All information regarding the accounts the user manages display.

Click blue or grey links to view details regarding the budgeted amounts.

U signifies Umbrella accounts (For Example, 00 accounts, such as EEE00).

P signifies Pooled accounts or accounts that are linked to U accounts (For Example, EEE01)

Budget summary							
Fiscal Year: 2007							
GL Account	U/P	GL Description	Budgeted	Requisitioned	Encumbered	Actual	Funds Available
1-573-111-AAA01		Education : State Mtc(7116-0100) : Salaries, Regular	918,419.00	0.00	0.00	822,197.10	96,221.90
1-573-111-AAA08		Education : State Mtc(7116-0100) : Overtime pay	0.00	0.00	0.00	134.81	134.81-
1-573-225-AAA15		Education : TELL Grant : Research/summer fac	0.00	0.00	0.00	10,000.00	10,000.00-
1-573-225-EEE01		Education : TELL Grant : Office/admin supp	0.00	0.00	0.00	113.52	113.52-
1-573-225-FFF16		Education : TELL Grant : Instruct/Libr Mats	0.00	0.00	0.00	18.51	18.51-
1-573-393-99000		Education : Depart. Revenue Sharing : F/B expendable	0.00	0.00	0.00	21,294.64-	21,294.64
1-573-400-AAA01		Education : General Trust Fund : Salaries, Regular	0.00	0.00	0.00	762.72	762.72-
1-573-400-AAA13		Education : General Trust Fund : Vacation-in-lieu	0.00	0.00	0.00	45.48	45.48-
1-573-400-AAA14		Education : General Trust Fund : Stipends	3,300.00	0.00	0.00	1,650.00	1,650.00-
1-573-400-AAA15		Education : General Trust Fund : Research/summer fac	0.00	0.00	0.00	1,200.00	1,200.00-
1-573-400-BBB00	U	Education : General Trust Fund : Travel	2,400.00	0.00	0.00	1,009.58	1,390.42
1-573-400-BBB01	P	Education : General Trust Fund : Out-of-state travel		0.00	0.00	0.00	

Budget Summary (Continued)

2. Scroll through information, as desired, and click on blue or gray links to view data details.
3. Click **OK** button at the bottom of the screen to return to the main Employees – WebAdvisor for Employees screen.

Budget Selection

1. On the **Employees – WebAdvisor for Employees Menu** screen, click the **Budget Selection** link.

The Budget Selection form displays.

The screenshot shows a web browser window titled "Budget selection - Windows Internet Explorer". The address bar shows a URL starting with "http://10.13.1.81:86/WebAdvisor/WebAdvisor?TOKENIDX=5117129922&SS=1&APP=CF&CONSTITUENCY=WBEM". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar contains various icons for navigation and search. The main content area is titled "EMPLOYEES" and "Welcome". The "Budget selection" form is displayed, featuring a "GL Component Selection" table with five columns: GL funds, GL units, GL sources, GL objects, and Projects. The "GL units" field contains the value "573" and the "GL objects" field contains "EEE". Below the table is a "Save GL Component Selection" checkbox. At the bottom of the form, there is a "Sort by" section with dropdown menus for "GL.FUND" and "GL.UNIT", and a "Subtotal" section with checkboxes for "GL.FUND" and "GL.UNIT". The browser's status bar at the bottom shows "Done", "Local intranet", and "100%".

2. Enter desired fund, unit, source, or object code(s) into the appropriate form fields.

Information for additional fund, source, or object codes for which the user is responsible can be entered into adjacent fields.

3. Scroll to the bottom of the form and click **Submit**.

A Budget Summary of the requested financial information displays.

Budget Selection

4. Click **OK** to return to the Employees – WebAdvisor for Employees menu.
5. Click the **Main Menu** tab to remain in WebAdvisor and obtain Faculty information or **WebAdvisor Log Out** to log off of WebAdvisor.

R. Sibulkin, Staff Associate
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Modified 2/15/2008