

WebAdvisor

# Budget Module Guide

A quick start guide for using the WebAdvisor Budget Module.

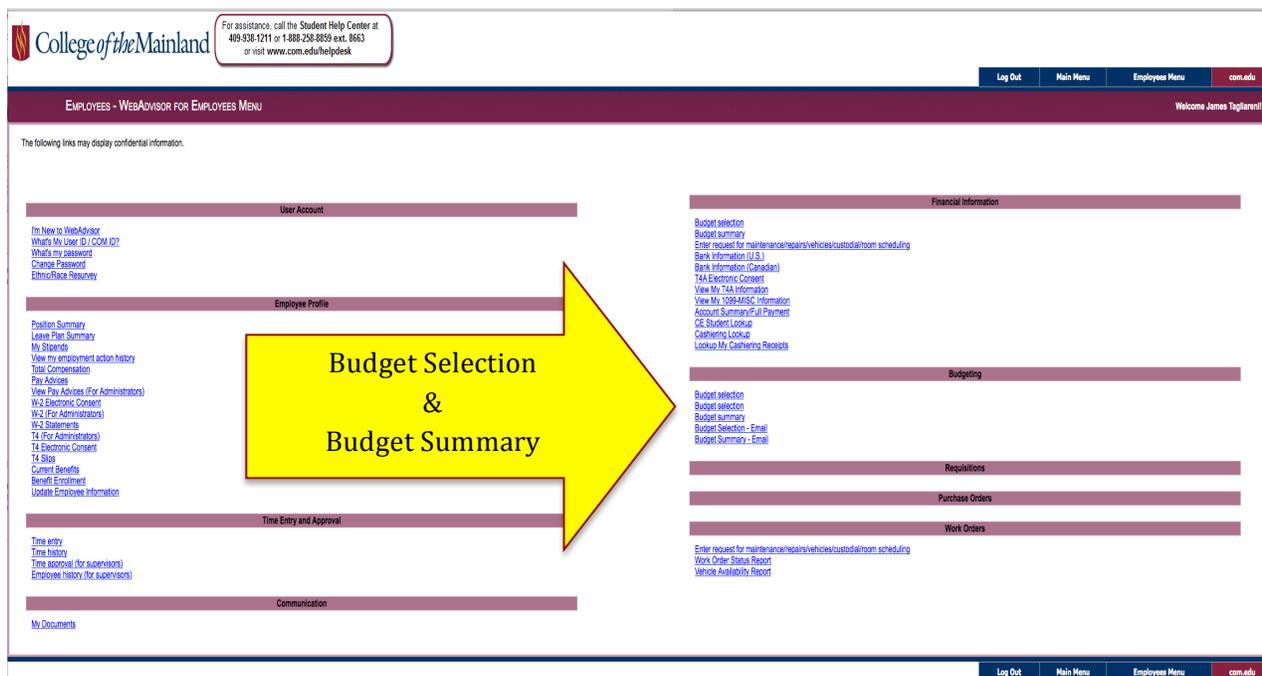
## WebAdvisor – Budget Information

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 COM Web Advisor by going to <https://webadvisor.com.edu>
2. Select **Login** at the top, enter your **COM Username** and **Password** and then click **Submit**.
3. Click the icon titled **Employees** to gain access to Budget information.

Employees – WebAdvisor for Employees screen displays.



The screenshot shows the 'EMPLOYEES - WebAdvisor FOR EMPLOYEES MENU' interface. A yellow arrow points to the 'Budget Selection & Budget Summary' link within the 'Budgeting' section. The interface includes a top navigation bar with 'Log Out', 'Main Menu', 'Employee Menu', and 'com.edu'. A sidebar on the left contains various menu categories: User Account, Employee Profile, Time Entry and Approval, and Communication. The main content area is divided into sections: Financial Information, Budgeting, Requisitions, Purchase Orders, and Work Orders. A footer at the bottom contains 'Log Out', 'Main Menu', 'Employee Menu', and 'com.edu'.

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

**Note: If the user has privileges to quite a few accounts, the user may get “timed out” prior to information 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 links to view details regarding the budgeted amounts.

### Budget summary

Fiscal Year 2015

GL Account	U/P	GL Description	Budgeted	Requisitioned	Encumbered	Actual	Funds Available
11-0-0000-3516-5120		ADM-Full time :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1,448.25
11-0-0000-3516-5140		PRO-Full Time :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	24.53
11-0-0000-3516-5160		CLA-Full Time :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1,448.25
11-0-0000-3516-5220		Emp Ben LOC-Health :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	24.53
11-0-0000-3516-5221		Emp Ben LOC-Dental :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1,448.25
11-0-0000-3516-5222		Emp Ben LOC-Disab :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	24.53
11-0-0000-3516-5223		Emp Ben LOC-Life :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1,448.25
11-0-0000-3516-5245		Emp Ben LOC-ORP :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	24.53
11-0-0000-3516-5246		Emp Ben LOC-TRS :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1,448.25
11-0-0000-3516-5261		Emp Ben LOC-Medicare :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	24.53
11-0-0000-3516-5263		Emp Ben LOC-Wrk Comp :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1,448.25
11-0-0000-3516-5264		Emp Ben LOC-Unempl :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	24.53
11-0-0000-3516-5300		Cont Svcs-Pd Cntractr :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1,448.25
11-0-0000-3516-5320		Maint & Repair Svcs :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	24.53
11-0-0000-3516-5332		Professional Svcs-Oth :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1,448.25
11-0-0000-3516-5370		Utilities-Telephone :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	24.53
11-0-0000-3516-5420		Supp-Cmp Hardwr<\$5000 :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1,448.25
11-0-0000-3516-5421		Supp-Cmp Softwr<\$5000 :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	24.53
11-0-0000-3516-5461		Supp-Office :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1,448.25
11-0-0000-3516-5550		Postage & Delivery :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	24.53
11-0-0000-3516-5570		Printing&Reproduction :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1,448.25
11-0-0000-3516-5640		Trvel Wrk Rel-Employe :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	24.53
11-0-0000-3516-5931		Cap Out-Comps>\$5,000 :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	1,448.25
11-0-0000-3516-5932		Cap Out-Softwr>\$5000 :: Information Technology Serv	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	24.53
		Dept Total	0.00	0.00	0.00	0.00	0.00

2. Scroll through information, as desired, and click on blue 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.

EMPLOYEES

**Budget selection**

**GL Component Selection**

Fund	<input type="text"/>				
Location	<input type="text"/>				
Activity	<input type="text"/>				
Dept	<input type="text"/>				
Object	<input type="text"/>				
Project	<input type="text"/>				

Save GL Component Selection

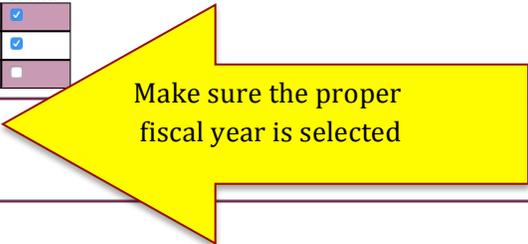
Remove Previously Saved GL Component Selection

Sort by	Subtotal
FUND - FUND <input type="text"/>	<input checked="" type="checkbox"/>
DEPT - DEPT <input type="text"/>	<input checked="" type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>

Fiscal Year

Actuals Begin Date

Actuals End Date



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

4. Click **OK** to return to the Employees – WebAdvisor for Employees menu.
5. When finished reviewing your budget select **Log Out** to log off of WebAdvisor.