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.

   ![WebAdvisor Main Menu](image)

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.

   ![Employees Screen](image)

   **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 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 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)

<table>
<thead>
<tr>
<th>GL Account</th>
<th>U/P</th>
<th>GL Description</th>
<th>Budgeted</th>
<th>Requisitioned</th>
<th>Encumbered</th>
<th>Actual</th>
<th>Funds Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-573-111-AAA01</td>
<td></td>
<td>Education : State HCC(7116-9100) : Salaries, Regular</td>
<td>9,544,498.00</td>
<td>1,00</td>
<td>1,00</td>
<td>9,294,64</td>
<td>45,223.98</td>
</tr>
<tr>
<td>1-573-111-AAA08</td>
<td></td>
<td>Education : State HCC(7116-9100) : Overtime pay</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>134.61</td>
<td>134.61</td>
</tr>
<tr>
<td>1-573-225-AAA16</td>
<td></td>
<td>Education : TELL Grant : Research/Summer Fac</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>10,000.00</td>
<td>10,000.00</td>
</tr>
<tr>
<td>1-573-225-EEE01</td>
<td></td>
<td>Education : TELL Grant : Offset accounts</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>113.62</td>
<td>113.62</td>
</tr>
<tr>
<td>1-573-225-EFF16</td>
<td></td>
<td>Education : TELL Grant : Instrct/Instrc/Media</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>5,51</td>
<td>5,51</td>
</tr>
<tr>
<td>1-573-391-99000</td>
<td></td>
<td>Education : Depar. Revenue Sharing : FAF receivable</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>21,024.64</td>
<td>21,024.64</td>
</tr>
<tr>
<td>1-573-460-AAA01</td>
<td></td>
<td>Education : General Trust Fund : Salaries, Regular</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>782.73</td>
<td>782.73</td>
</tr>
<tr>
<td>1-573-460-AAA12</td>
<td></td>
<td>Education : General Trust Fund : Vacation-in-leave</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>42.06</td>
<td>42.06</td>
</tr>
<tr>
<td>1-573-460-AAA14</td>
<td></td>
<td>Education : General Trust Fund : Stipenda</td>
<td>3,300.00</td>
<td>0.00</td>
<td>0.00</td>
<td>1,640.00</td>
<td>1,640.00</td>
</tr>
<tr>
<td>1-573-460-AAA16</td>
<td></td>
<td>Education : General Trust Fund : Research/Summer Fac</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>1,200.00</td>
<td>1,200.00</td>
</tr>
<tr>
<td>1-573-460-BBB09</td>
<td>U</td>
<td>Education : General Trust Fund : Travel</td>
<td>2,490.00</td>
<td>0.00</td>
<td>0.00</td>
<td>1,600.00</td>
<td>1,200.42</td>
</tr>
<tr>
<td>1-573-460-BBB61</td>
<td>P</td>
<td>Education : General Trust Fund : Out-of-state Travel</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>
**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.

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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