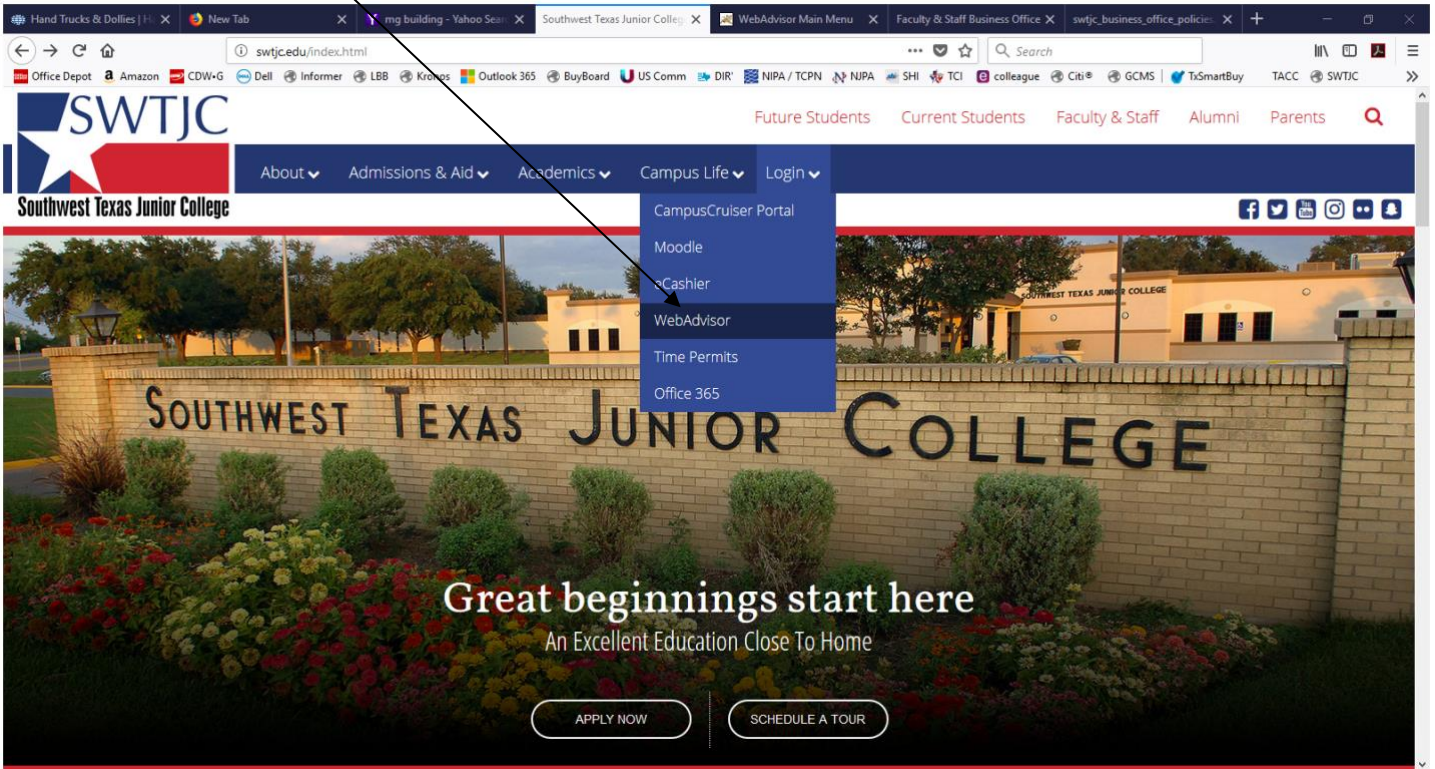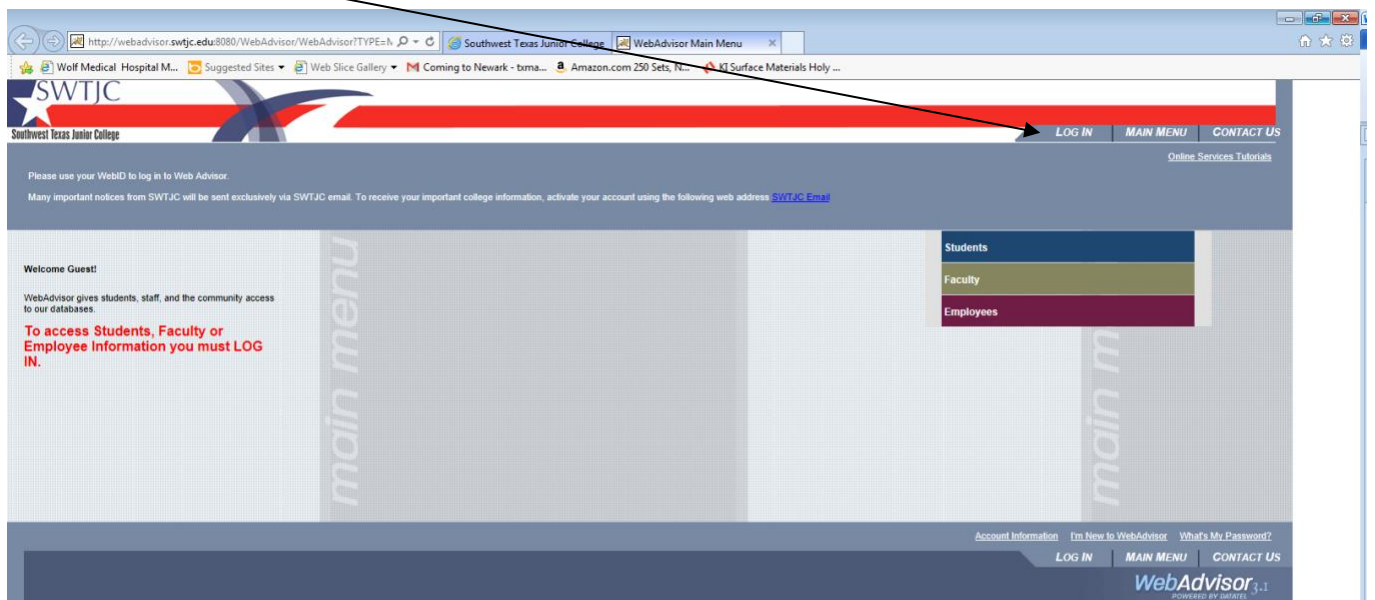**HOW TO CHECK BUDGET, PAYMENTS, AND PO & BLANKET PO BALANCES IN WEBADVISOR**
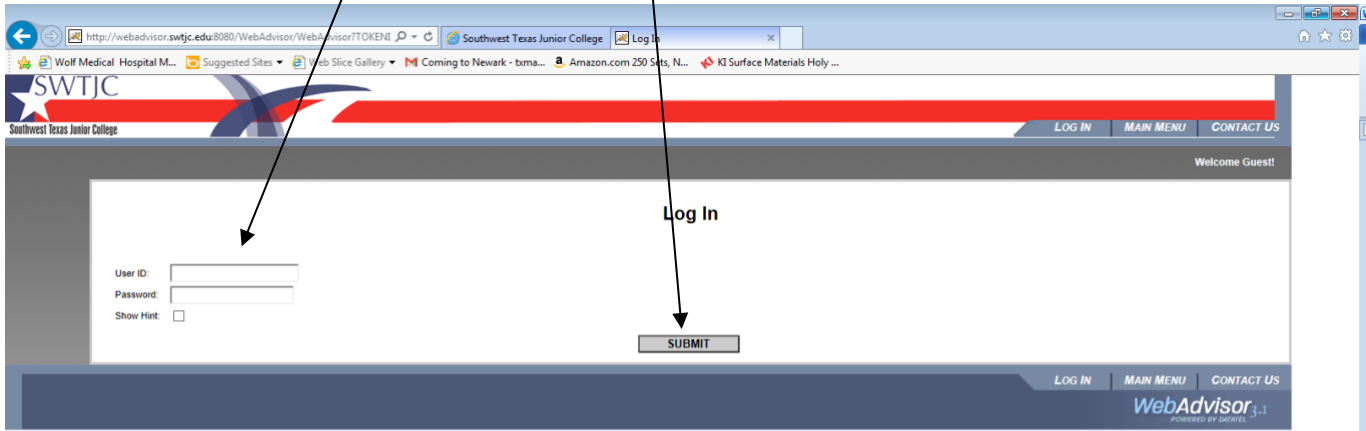
1. From the SWTJC Home page on your Internet browser (Firefox, Internet Explorer or Chrome for example), click on WebAdvisor:
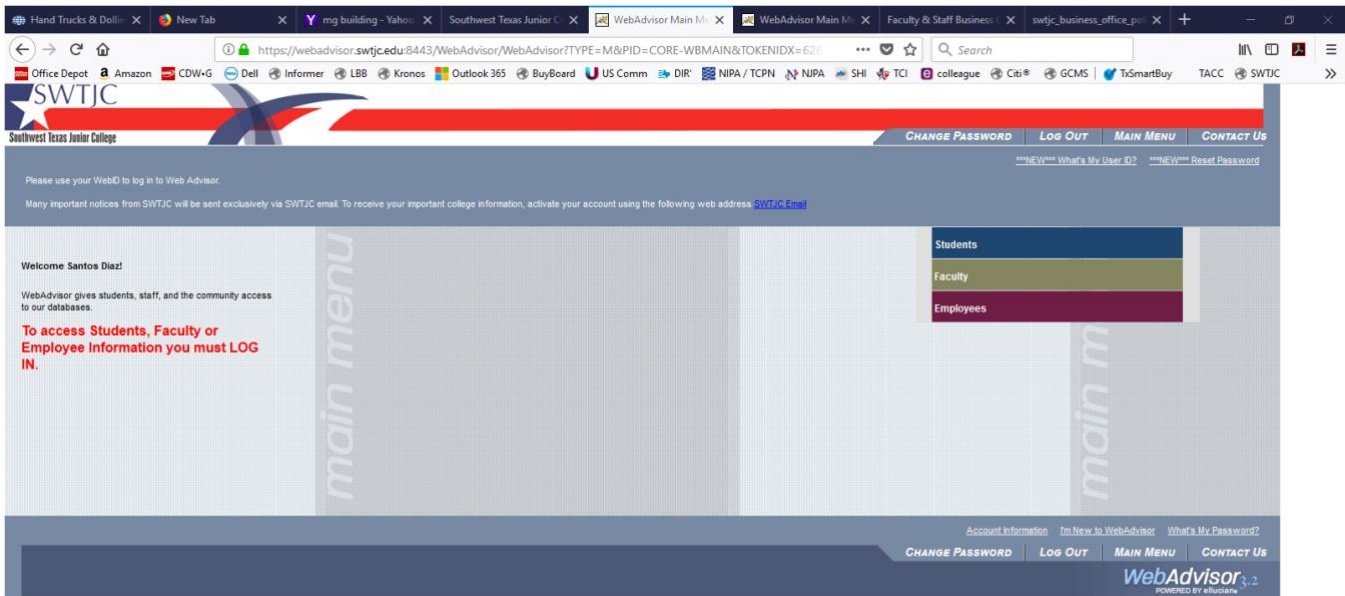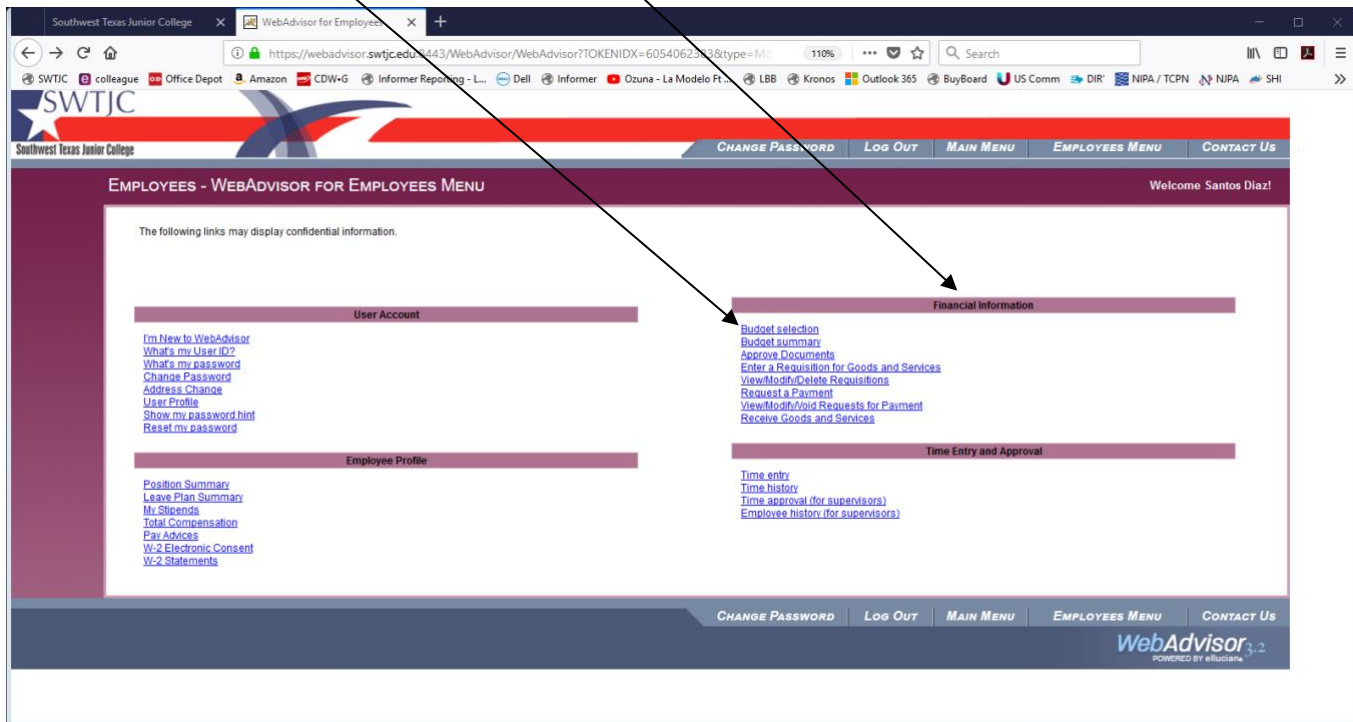

2. Click on Log In:

3. Enter your **User ID** and **Password** and click **Submit:**

4. Click on **Employees**:

5. Click on **Budget Selection** in the **Financial Information** section:

6. Enter GL Account information. Generally, you will want to see your **entire department budget**, so you need only enter the **Dept** (ex: in the string 12‑110402‑5001‑01, **110402** is the Dept). You may also wish to include your **Location** if you want a particular campus. (ex: 12‑110402‑5001‑01, **01** is the location for Uvalde). If you want to look *at all locations, leave this field blank*. Make sure the **Fiscal Year** is the current one. Click **Submit**:

7. Note the total **<u>Budgeted</u>** for your department's operating expenses, amount **<u>Requisitioned</u>** (an amount set aside before it becomes a PO), amount **<u>Encumbered</u>** (a current PO or BPO), and **<u>Actual</u>** amount (amount expensed), and the **<u>Funds Available</u>**. (The top line in **bold** represents a "roll‑up" of all of the accounts listed below in gray.) To see the detail for a particular line item in gray, place your cursor over the amount and click on it. *Please keep in mind that the top line is the "Umbrella" (summary/roll‑up) account. It is NOT an expense line.*

8. It is **important** to keep in mind that your **Funds Available** must also cover your 7000's (Part-time faculty) as well as any 9000's (capital purchases) that you might need for the fiscal year.

9. When you detail into a specific line --- **Actual** for example:

10. You will be taken to a detail screen. And from there you can drill in even further by clicking the link provided…

11. …and see the detail for that transaction. And so on, as long as there is a link…

12. …you can see everything about the transaction.

13. Couple of points to consider:

- You can only look at budgets that you have been given access to. If, after you enter a budget selection, (see Step 8), you get a warning to the effect that "you do not have a staff record…", then you'll need to have a help desk request for WebAdvisor submitted by your supervisor for access to a specific department. (Please use the SysAid icon on your desktops)

- For information about Blanket Purchase orders, drill into the Encumbrance section and continue to drill in to see your line item budget and balance available.

- If you click on Budget Summary from the "Employee" screen instead of Budget Selection, the system will show the last budget you accessed without having to input the department numbers again.

- When you leave a screen, it's good practice to click on the Close Window or OK "buttons" at the bottom of the screen. Whether you do this or not, it's possible to receive a "too many cookies" error, in which case you'll need to simply log out of your internet browser, and go back in.

- During the time period at the close and opening of the fiscal years, for a couple of weeks, you are able to see both prior and upcoming fiscal years, so be sure you are in the correct year when you access WebAdvisor Budget.