

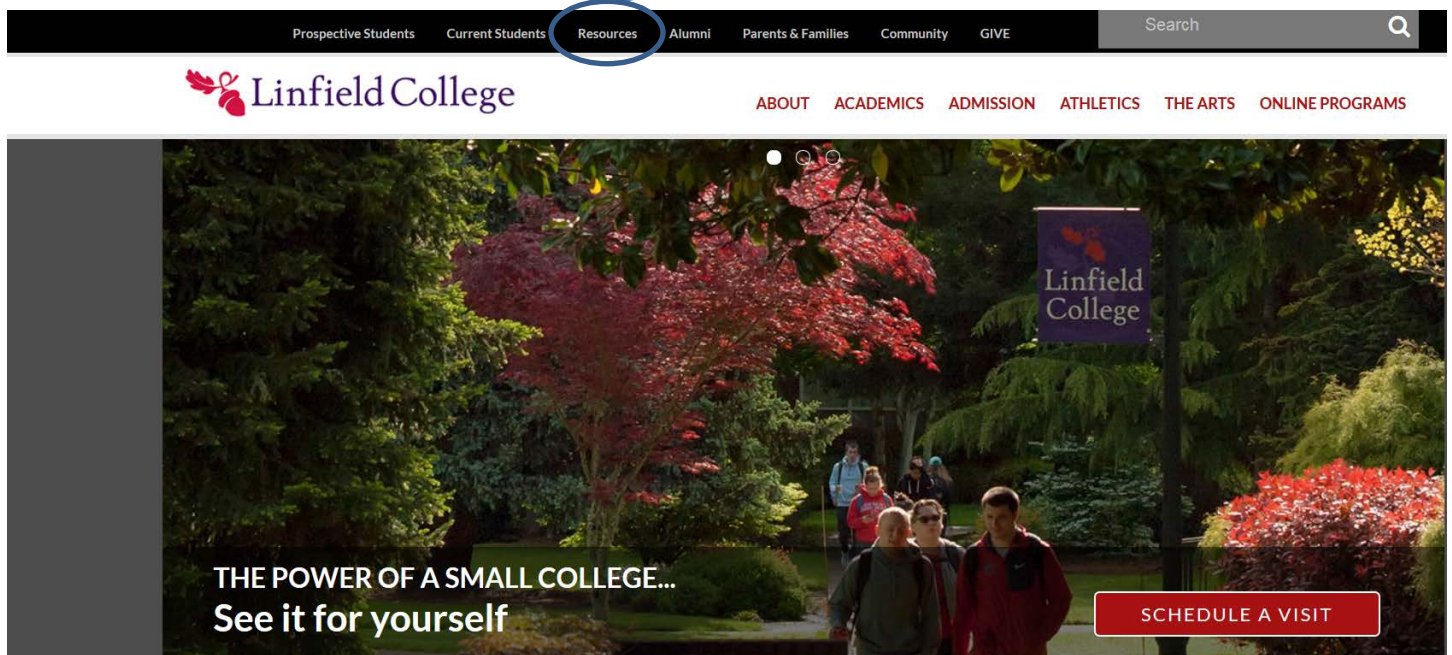
WebAdvisor Budget Access Instruction

First, you need a WebAdvisor account.

If you have not yet signed a FERPA form (when you filled out new employee paperwork) with HR, please see them first. If your FERPA is on file, you can request a WebAdvisor account from:

Datatel support datatel-support@linfield.edu.

STEP #1: Choose the Resources link on the Linfield home page, or click here: <http://www.linfield.edu/resources.html>



About Linfield

Apply

Visit

STEP #2:

CLICK on the Web Advisor LINK in the frame.

Prospective Students Current Students Resources Alumni Parents & Families Community GIVE Search

Linfield College ABOUT ACADEMICS ADMISSION ATHLETICS THE ARTS ONLINE PROGRAMS

RESOURCES

HOME > RESOURCES

- Resources Home
- Blackboard
- Webmail
- Lindex
- Timesaver Login
- WebAdvisor

Resources For:

- Prospective Students
- Current Students
- All Faculty
- OCE Faculty Guide
- Current Employees

Calendars

- Full Academic Calendar
- Daily Events Calendar

Offices and Services

- Financial Aid

STEP #3:

Click on 'LOG IN' tab

Linfield College WebAdvisor

LOG IN MAIN MENU CONTACT US

Newly Enrolled Linfield Students:
Your access to WebAdvisor is based on your CatNet ID (e-mail account).

To log into WebAdvisor, use your CatNet ID (e-mail username in all lower-case, without @linfield.edu) and Password.

If you have not created a CatNet ID, please click on [Create your CatNet account](#)

Welcome Guest!

Prospective Students
Check your application! Prospective students may check their Linfield application online by [creating a Linfield WebAdvisor applicant account](#). If you have already created an account, proceed by using the "Log in" link at the top of this page.

International Students
Check your application! International students may check their

STEP #4:

LOG IN using Catnet ID, then select SUBMIT button bottom center of screen

Log In

WebAdvisor is not accessible during the system back up between 12:30am and 1:30am.

To log into WebAdvisor, use your CatNet ID (e-mail username in all lower-case, without @linfield.edu) and Password.

Current Linfield Students / Faculty / Staff

If you have **forgotten** or need to **change** your CatNet **password**, please click [here](#)

Linfield Alumni

If your WebAdvisor **account does not work** and you **graduated**, please click [here](#)

Supported Browsers

Currently, WebAdvisor supports 5 browsers:

Chrome 32

Firefox 24

Internet Explorer 10

Safari 7

Mac OS X Mavericks (10.9)

WebAdvisor does not support Opera and other browsers, and there are situations where some WebAdvisor pages will not work in these other browsers. Our apologies for the inconvenience. We are working with our vendor to try to address these limitations.

CatNet ID *

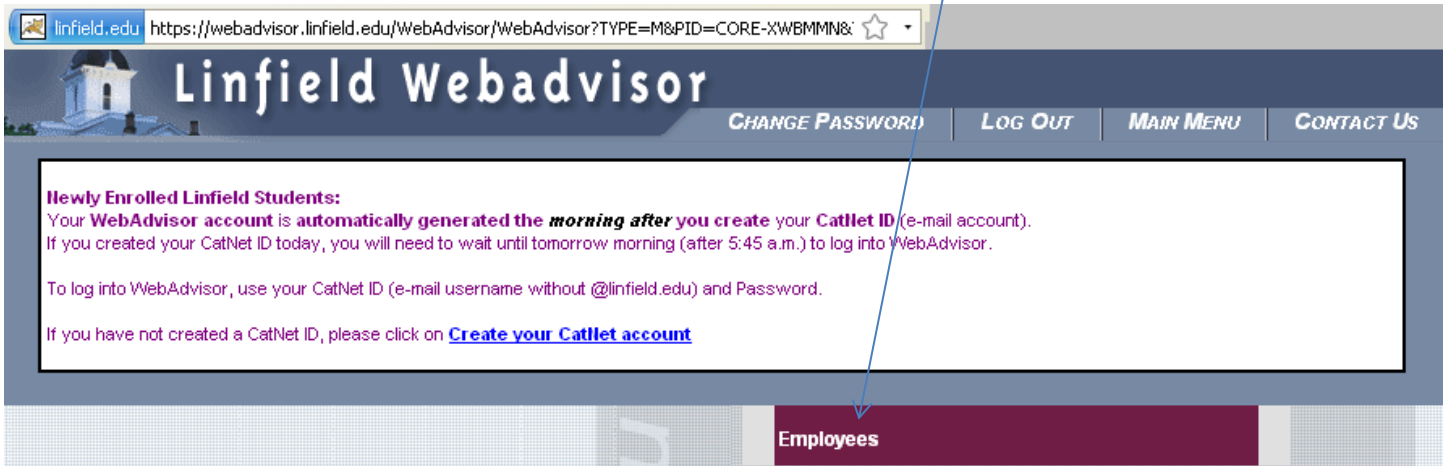
Password *

Hint

SUBMIT

STEP #5:

Select "EMPLOYEES" or "FACULTY" bar in center right of screen.



linfield.edu https://webadvisor.linfield.edu/WebAdvisor/WebAdvisor?TYPE=M&PID=CORE-XWBMMN& ☆

Linfield Webadvisor

CHANGE PASSWORD | LOG OUT | MAIN MENU | CONTACT US

Newly Enrolled Linfield Students:
Your **WebAdvisor account** is **automatically generated the morning after you create your Catlet ID** (e-mail account).
If you created your CatNet ID today, you will need to wait until tomorrow morning (after 5:45 a.m.) to log into WebAdvisor.

To log into WebAdvisor, use your CatNet ID (e-mail username without @linfield.edu) and Password.

If you have not created a CatNet ID, please click on [Create your Catlet account](#)

Employees

STEP #6:

Choose "[Budget Selection](#)", wherever it appears on your screen.

The screenshot shows the Linfield WebAdvisor interface. At the top, there is a navigation bar with the following links: [CHANGE PASSWORD](#), [LOG OUT](#), [MAIN MENU](#), [EMPLOYEES MENU](#), and [CONTACT Us](#). Below this, the page title is "EMPLOYEES - WEBADVISOR FOR EMPLOYEES MENU" and a "Welcome" message is visible on the right. A red "Menu Changes" notification states: "You may notice some changes to menu options. We are cleaning out menu items that have become obsolete. You're not losing anything! We're just doing some spring cleaning." The main content area is divided into several sections:

- Personal Profile**: [Change Password](#), [Did you lose your password?](#)
- Student and Staff Directory**: [Search the Lindex by name](#), [Search the Lindex](#), [Download Lindex PDF](#)
- Online Budgeting**: [Budget selection](#) (highlighted with a blue arrow)
- Registration**: [Search for Sections](#)
- Employee Information**: [Emergency Notification System](#)

At the bottom, there is another navigation bar with the same links: [CHANGE PASSWORD](#), [LOG OUT](#), [MAIN MENU](#), [EMPLOYEES MENU](#), and [CONTACT Us](#).

STEP #7:

Funds: Enter the first number of your budget in the first box of the first row Funds and continue down as shown below. Click or tab to the next row.

Source (Src): Enter the second number in the SRC box

Dept: Enter all 5 numbers of your account in the first box of the Dept row.

Objects: In the 4th row down you can put just a '3' to view all your expenses in the Depts field, or be more specific and enter entire object code, i.e. 32200—supplies in one box. Object codes that begin with '1' are Revenue, '2' are Salaries, and '3' are other Expense lines. If you leave the Object row blank, you will pull up all budget activity. You should not combine salaries (2's) and programming (3's) available balances.

Projects: Don't Use this field

Sort By boxes: There is **no need** to change SORT BY boxes.

Fiscal Year: Select the Fiscal Year you want to view. Note: you can see current year and prior year, but the prior year will only be available until the year is physically closed in the Colleague system near the first of October each year. You can narrow down the Actuals dates if desired.

For most department budgets, a good format to see what is available for student workers and your other expenses is to enter as follows (use your specific department number where xxxxx is entered & for object codes use 21500, 21550, 21525, 3).

Budget selection

GL Component Selection

| | | | | | |
|---------|-------|-------|-------|---|--|
| Fund | 0 | | | | |
| Src | 1 | | | | |
| Dept | xxxxx | | | | |
| Object | 21500 | 21525 | 21550 | 3 | |
| Project | | | | | |

- Save GL Component Selection
- Remove Previously Saved GL Component Selection

STEP #8:

Funds Available show in the far right column. Anything underlined can be selected for more detail of what makes up the figure.

Fiscal Year 2014

| GL Account | U/P | GL Description | Budgeted | Requisitioned | Encumbered | Actual | Funds Available |
|-----------------|-----|--|-----------------|---------------|-------------|-----------------|-----------------|
| 0-1-21025-21500 | | STDNT ACTIVITIES : WAGES: STDNT CAMPUS | <u>0.00</u> | <u>0.00</u> | <u>0.00</u> | <u>745.10</u> | 745.10- |
| 0-1-21025-21550 | | STDNT ACTIVITIES : WAGES: STDNT WORK STUDY | <u>4,762.00</u> | <u>0.00</u> | <u>0.00</u> | <u>3,215.67</u> | 1,546.33 |
| 0-1-21025-32130 | | STDNT ACTIVITIES : POSTAGE | <u>84.00</u> | <u>0.00</u> | <u>0.00</u> | <u>25.36</u> | 58.64 |
| 0-1-21025-32140 | | STDNT ACTIVITIES : PRINT & COPY | <u>200.00</u> | <u>0.00</u> | <u>0.00</u> | <u>22.50</u> | 177.50 |
| 0-1-21025-32150 | | STDNT ACTIVITIES : PROGRAMMING | <u>2,000.00</u> | <u>0.00</u> | <u>0.00</u> | <u>2,829.67</u> | 829.67- |
| 0-1-21025-32200 | | STDNT ACTIVITIES : SUPPLIES & EXPENSE | <u>800.00</u> | <u>0.00</u> | <u>0.00</u> | <u>498.22</u> | 301.78 |
| 0-1-21025-33200 | | STDNT ACTIVITIES : TRAVEL-PROF/CONF | <u>5,468.00</u> | <u>0.00</u> | <u>0.00</u> | <u>4,876.59</u> | 591.41 |
| 0-1-21025-33300 | | STDNT ACTIVITIES : TRAVEL-ADMIN | <u>0.00</u> | <u>0.00</u> | <u>0.00</u> | <u>16.74</u> | 16.74- |
| 0-1-21025-33400 | | STDNT ACTIVITIES : FOOD | <u>100.00</u> | <u>0.00</u> | <u>0.00</u> | <u>101.65</u> | 1.65- |
| 0-1-21025-35320 | | STDNT ACTIVITIES : MEMBERSHIPS & DUES | <u>204.00</u> | <u>0.00</u> | <u>0.00</u> | <u>0.00</u> | 204.00 |
| 0-1-21025-35400 | | STDNT ACTIVITIES : PHONE-LONG DISTANCE | <u>59.00</u> | <u>0.00</u> | <u>0.00</u> | <u>76.57</u> | 17.57- |
| 0-1-21025-35405 | | STDNT ACTIVITIES : CELL PHONE | <u>900.00</u> | <u>0.00</u> | <u>0.00</u> | <u>875.16</u> | 24.84 |
| 0-1-21025-35420 | | STDNT ACTIVITIES : PHONE EQUIP | <u>240.00</u> | <u>0.00</u> | <u>0.00</u> | <u>242.61</u> | 2.61- |
| 0-1-21025-38140 | | STDNT ACTIVITIES : CONTINGENCY | <u>0.00</u> | <u>0.00</u> | <u>0.00</u> | <u>250.00</u> | 250.00- |
| | | Dept Total | 14,817.00 | 0.00 | 0.00 | 13,775.84 | 1,041.16 |
| | | Fund Total | 14,817.00 | 0.00 | 0.00 | 13,775.84 | 1,041.16 |

Choosing OK at the bottom of the screen takes you back to the main menu, using the BACK arrow of your browser takes you back to the BUDGET SELECTION page.

CLICK on individual underlined (linked) number to view the "Actual" detail screen, with line by line transaction details that comprise the summary budget number, as shown below.

Actuals

Fiscal Year 2010
 GL Account 0-1-31025-32140
 GL Account Description MAIL SERVICES PRINT & COPY

Date Range 07/01/09 - 06/30/10

| Reference No. | Date | Source | Description | Amount |
|--------------------------|----------|---------------------|-------------------------|--------|
| V0321053 | 06/04/10 | PJ Purchase Journal | Print NW | 120.29 |
| J042705 | 05/25/10 | JE General Journal | Lak Print Chgs: May | 12.45 |
| J042705 | 05/25/10 | JE General Journal | Lak Print Chgs: May | 0.45 |
| A000013333 | 05/05/10 | CR Cash Receipts | Summary for session 861 | 17.70- |
| J042595 | 04/30/10 | JE General Journal | Print Lab Chgs: April | 11.05 |
| V0318755 | 04/19/10 | PJ Purchase Journal | Print NW | 10.99 |
| V0318721 | 04/19/10 | PJ Purchase Journal | Print NW | 64.50 |

EMPLOYEES

Budget summary

Fiscal Year 2010

| GL Account | U/P | GL Description | Budgeted | Requisitioned | Encumbered | Actual | Funds Available |
|-----------------|-----|-------------------------------------|-----------|---------------|------------|-----------|-----------------|
| 0-1-31025-32050 | | MAIL SERVICES : COMP SOFTWARE | 1,500.00 | 0.00 | 0.00 | 0.00 | 1,500.00 |
| 0-1-31025-32130 | | MAIL SERVICES : POSTAGE | 12.00 | 0.00 | 0.00 | 13.24 | 1.24- |
| 0-1-31025-32140 | | MAIL SERVICES : PRINT & COPY | 600.00 | 0.00 | 0.00 | 310.23 | 289.77 |
| 0-1-31025-32200 | | MAIL SERVICES : SUPPLIES & EXPENSE | 4,000.00 | 0.00 | 1,680.00 | 2,253.98 | 66.02 |
| 0-1-31025-33300 | | MAIL SERVICES : TRAVEL-ADMIN | 1,250.00 | 0.00 | 0.00 | 1,034.40 | 215.60 |
| 0-1-31025-35160 | | MAIL SERVICES : CONTRACTED SERVICES | 2,000.00 | 0.00 | 0.00 | 2,526.00 | 526.00- |
| 0-1-31025-35320 | | MAIL SERVICES : MEMBERSHIPS & DUES | 130.00 | 0.00 | 0.00 | 145.00 | 15.00- |
| 0-1-31025-35400 | | MAIL SERVICES : PHONE-LONG DISTANCE | 75.00 | 0.00 | 0.00 | 89.04 | 14.04- |
| 0-1-31025-35420 | | MAIL SERVICES : PHONE EQUIP | 1,200.00 | 0.00 | 0.00 | 1,200.00 | 0.00 |
| 0-1-31025-37190 | | MAIL SERVICES : MAINTENANCE EXPENSE | 5,166.00 | 0.00 | 0.00 | 5,090.32 | 75.68 |
| | | Dept Total | 15,933.00 | 0.00 | 1,680.00 | 12,662.21 | 1,590.79 |
| | | Fund Total | 15,933.00 | 0.00 | 1,680.00 | 12,662.21 | 1,590.79 |
| | | Grand Total | 15,933.00 | 0.00 | 1,680.00 | 12,662.21 | 1,590.79 |

OK

Note: accounts that begin with 0-1-xxxxx are actual budget accounts & will display with a beginning budget, activity to date, and an ending account fund availability. All other accounts, i.e. 1-1-xxxxx or 2-3-xxxxx are accounts that are not budgeted each year & account balances roll forward from prior year(s). There will be no "beginning" budget amount, but webadvisor will still show activity that has occurred and funds available at the bottom of the screen. (Object code - 88800 is the brought forward balance from the prior year. The first few months of each new fiscal year (July-Sept) you need to look at two years for balances and combine the totals. The roll forward balance will appear in the current fiscal year as soon as the prior year is closed in the system. (If you have two years to choose from at bottom of screen, the previous year is not yet closed and you need to look at both year balances.)

STEP #9 - PRINTING:

Print this screen using your normal tool bar functions. If you choose Print Preview, you can choose Landscape.

Print... Page Setup... Page: 1 of 1 Scale: Shrink To Fit Portrait Landscape Close

Budget summary <https://webadvisor.linfield.edu/WebAdvisor/WebAdvisor?TOKENIDX=5674503169&SS=...>

Fiscal Year 2010

Budget summary

| GL Account | U/P | GL Description | Budgeted | Requisitioned | Encumbered | Actual | Funds Available |
|-----------------|-----|------------------------------------|----------|---------------|------------|----------|-----------------|
| 0-1-31025-32050 | | MAIL SERVICES : COMP SOFTWARE | 1,500.00 | 0.00 | 0.00 | 0.00 | 1,500.00 |
| 0-1-31025-32130 | | MAIL SERVICES : POSTAGE | 12.00 | 0.00 | 0.00 | 13.24 | 1.24- |
| 0-1-31025-32140 | | MAIL SERVICES : PRINT & COPY | 600.00 | 0.00 | 0.00 | 310.23 | 289.77 |
| 0-1-31025-32200 | | MAIL SERVICES : SUPPLIES & EXPENSE | 4,000.00 | 0.00 | 1,680.00 | 2,253.98 | 66.02 |

On this page, CLOSE WINDOW at the bottom takes you back a screen.

Remember to LOG OUT when you are through.

We are happy to help with any questions you may have... Datatel Support can help with WebAdvisor set-up or log-in issues Datatel-support@linfield.edu. The accounting department can help with any budget questions.

Judy Wells x 2463
jwells@linfield.edu
Accounting Department
Melrose Hall, Room #112