Using My Budget on Furman’s WebAdvisor

How do I access My Budget?

My Budget is accessed through the My Furman site.

From www.furman.edu click on My Furman on the top menu ribbon.

At the login screen enter in your Furman Network Username and Password.

Click on Department Budgets. Then click on Budget Selection
GL Component Selection

You may use this screen to generate reports that can list information in a variety of ways depending on the selection and sort combination you select. For example, you may choose to run a report for an individual general ledger account, object code, or account balances for a department or for multiple departments.

Input the fund number in the Fund(s) section, sub fund/trust/project number in the STP(s) section if needed, department number in the Department(s) section, and the object code in Object Code(s) section. (See pg 8 for information on GL account structure)

It is not necessary to input data in all of the fields in the GL Component Section. For example, if you would like a report on travel for all of your departments, enter 82300 in Object Code field. You may also choose to sort on this object code so that your report would then total by the selected object code.
The **Project(s)** selection area will remain void.

The **Sort by** selection area is populated with the most common sort order criteria to view your budget. If you wish, you can change either of these to something that has more meaning for you. To change the sort selection click on the first sort field and you will get a drop down list of the options available. Repeat this for the second and third field. The report will display accounts in ascending order based on the sort options you select, and will break and subtotal on each of the first two sort fields you specify. If you enter only one sort field, there is no account break and only one level of subtotals.

You can choose a **fiscal** year to look at by using the drop down arrow.

The **Actuals Begin Date** and **Actuals End Date** can be used to define a range of dates within which you can see transactions. By specifying a date range, you will still see year to date actual totals on the budget summary screen; however, when you drill down in to the transaction details you will only see the transactions for the specified date range. If you leave both the Actuals begin date and the Actuals end date blank (like shown), then you will see transactions for the entire selected fiscal year. Each time you return to this screen, make sure that these two fields contain the information you need. These fields will retain the information that was last entered.

Click on the **Submit** button.
You will see a summary report that is similar to the report below. Anytime you see a number with a different font color (blue), it means that detail information for that amount is available. Just click on the number and a screen will pop up with additional information.

When you are finished reviewing the details, you may do the following:

- Click on the Back button. This will take you back to the Budget selection screen.
- Click on any blue number to drill down to more detailed information.
- To go back to the My Furman home page click on the browser back button.
The following is an example of the detailed information for the actual. As you can see, anything that is blue is a hyperlink and can be clicked on to display more information.

<table>
<thead>
<tr>
<th>Reference No.</th>
<th>Date</th>
<th>Source</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>V0433172</td>
<td>03/08/10</td>
<td>PJ Purchase Journal</td>
<td>Hired Killers</td>
<td>175.00</td>
</tr>
<tr>
<td>V0433087</td>
<td>02/29/16</td>
<td>PJ Purchase Journal</td>
<td>James Freeman</td>
<td>54.00</td>
</tr>
<tr>
<td>V0428648</td>
<td>11/30/15</td>
<td>PJ Purchase Journal</td>
<td>James Freeman</td>
<td>54.00</td>
</tr>
<tr>
<td></td>
<td>11/28/15</td>
<td>JE General Journal</td>
<td>ALLEN'S UNIVERSITY</td>
<td>53.50</td>
</tr>
<tr>
<td>V0424455</td>
<td>09/31/15</td>
<td>PJ Purchase Journal</td>
<td>James Freeman</td>
<td>54.00</td>
</tr>
</tbody>
</table>

If you had chosen a specific timeframe, the dates would appear here. This example is showing all of the current fiscal year.
**Printing a Report**

You can print an Excel-friendly CSV format report from either the Budget Summary or the detail-Actuals screen. The link to the report will be at the top of the Budget Summary screen and at the bottom of the detail-Actuals screen. The link looks like the following.

![Report in Excel-friendly CSV format](image)

Once you click on the link you will get the following dialog box.

![Dialog box](image)

Open with Microsoft Excel is the default. Click on OK and the spreadsheet will open and can be formatted as desired.

If you select Save File it will be saved in your Downloads folder.
Glossary

**Budgeted** – Displays the total amount budgeted for this GL account number for the selected fiscal year.

**Requisitioned** - This field will always display 0.00.

**Encumbered** – Displays the total amount currently encumbered for this GL account number for the selected fiscal year. This amount comes from purchase orders, blanket purchase orders, recurring vouchers and encumbrance journal entries.

**Actual** – Displays the total actual activity for this GL account number for the selected fiscal year. This amount comes from TAP cards, paid purchase orders, vouchers, journal entries, payroll, etc.

**Funds Available** – Displays the available funds remaining for each GL account number. This amount is calculated by subtracting requisition, encumbrance and actual activity in the account from the budgeted amount.
**Tips/Hints**

- It is helpful to understand the GL account structure to fully utilize the budget website. The 15-digit general ledger number has four main components: Fund (first two numbers), STP (next four numbers), Department (next four numbers), and the Object Code (the last five numbers).

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XX  -  XXXX  -  XXXX  -  XXXXXX
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- When determining your selection criteria, look at the account numbers and see which account components you want to see for the report. Do you want all Funds, or just 01 (Current Fund)? Do you want to see departmental budgets for expenditures with Object code(s) beginning with 8 (General expense object codes)?

- Security has been set up for your specific needs. Individuals in the same department may have different security levels set up.

- If you do not have access to an account that you should or if you receive an error message, please contact Lisa Bridges in Budget Services by email. Please keep in mind that, if you are not a budget officer for those accounts, we will need permission for the budget office to give you access.

- If you need a **new** GL account(s) or department(s) set up please notify Debbie McNeely by email. Debbie will notify Budget Services of the new account(s).