

Available Budget Page

Instructions on using the pages on the Webraider Portal

Updated October 2020

Texas Tech University Health Sciences Center
Budget Office

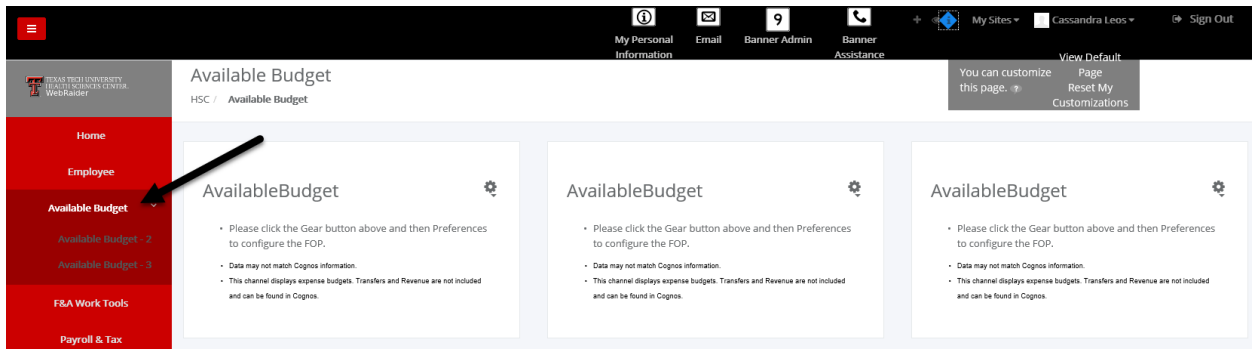
View live Budget status for your Banner Funds through the **Available Budget** page. This data comes directly from the BAVL table in Banner Finance INB and is updated in summary during the day as transactions affect your Budgets.

Reason for setting up Available Budget page

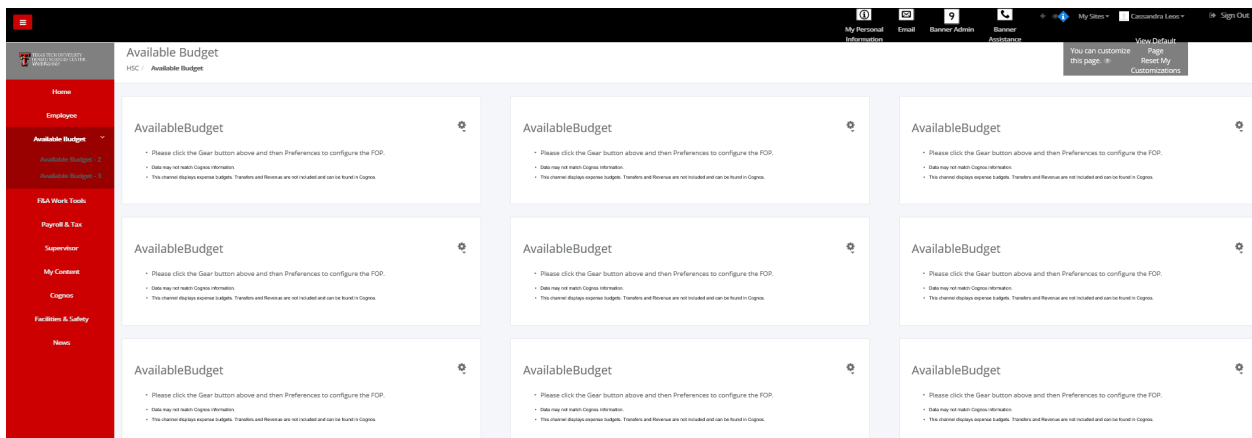
- 1) View budget for FOPs you set up.
- 2) See a reflection of your expense budget; only the expense and encumbrance transactions affecting your balances.
- 3) Viewing LIVE data (Cognos may not match due to the nightly update Cognos goes through).

Setting up the Available Budget page in the Webraider portal

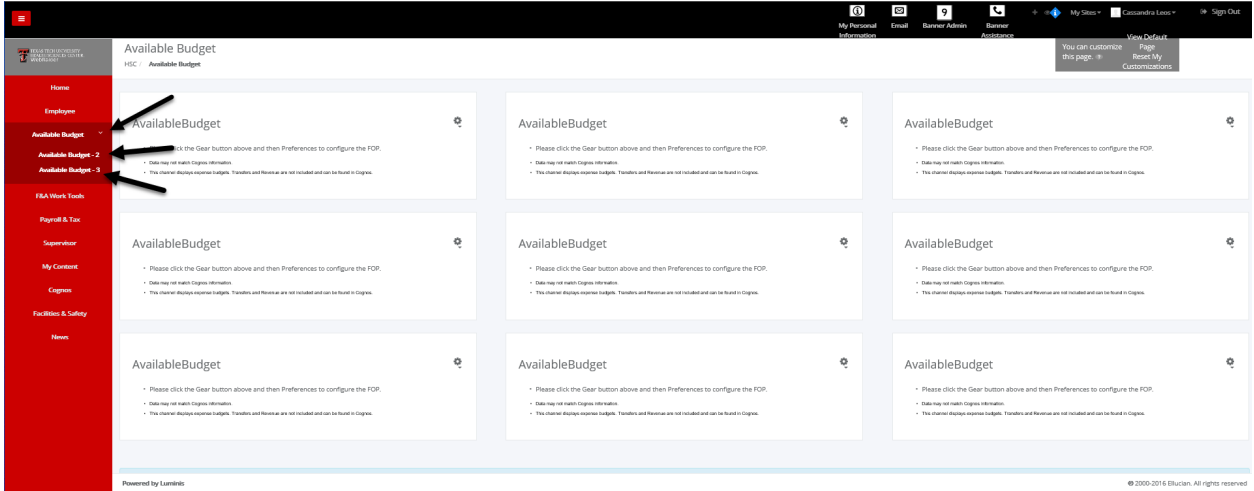
- 1) Go to the Webraider portal at <http://portal.texastech.edu/>.
- 2) The default page will be the Employee page
- 3) Click on the Available Budget page



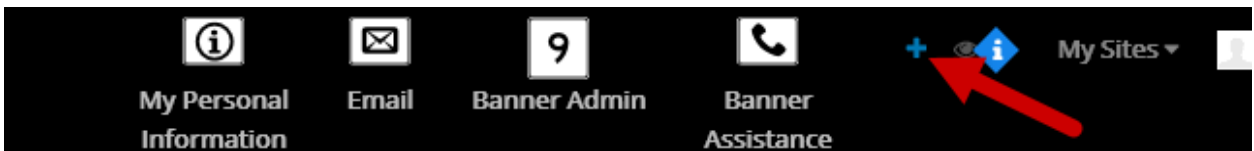
- 4) You will then see the following 9 Available Budget portlets



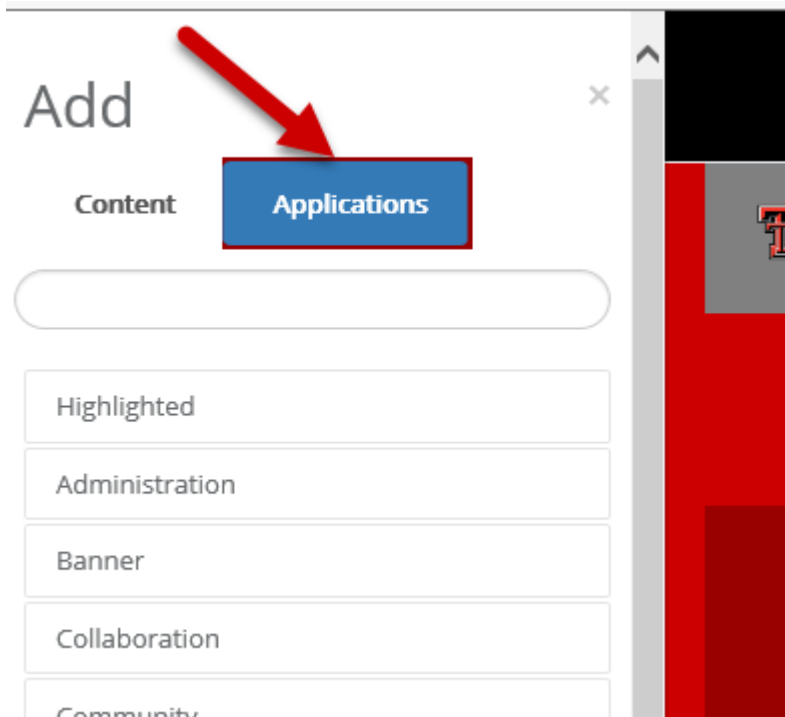
- 5) You also have two more Available Budget pages. There is a drop down under Available Budget for Available Budget – 2 and Available Budget – 3. Each of these pages also have 9 Available Budget portlets. Initially you have 27 Available Budget portlets in which to set up individual FOPs.



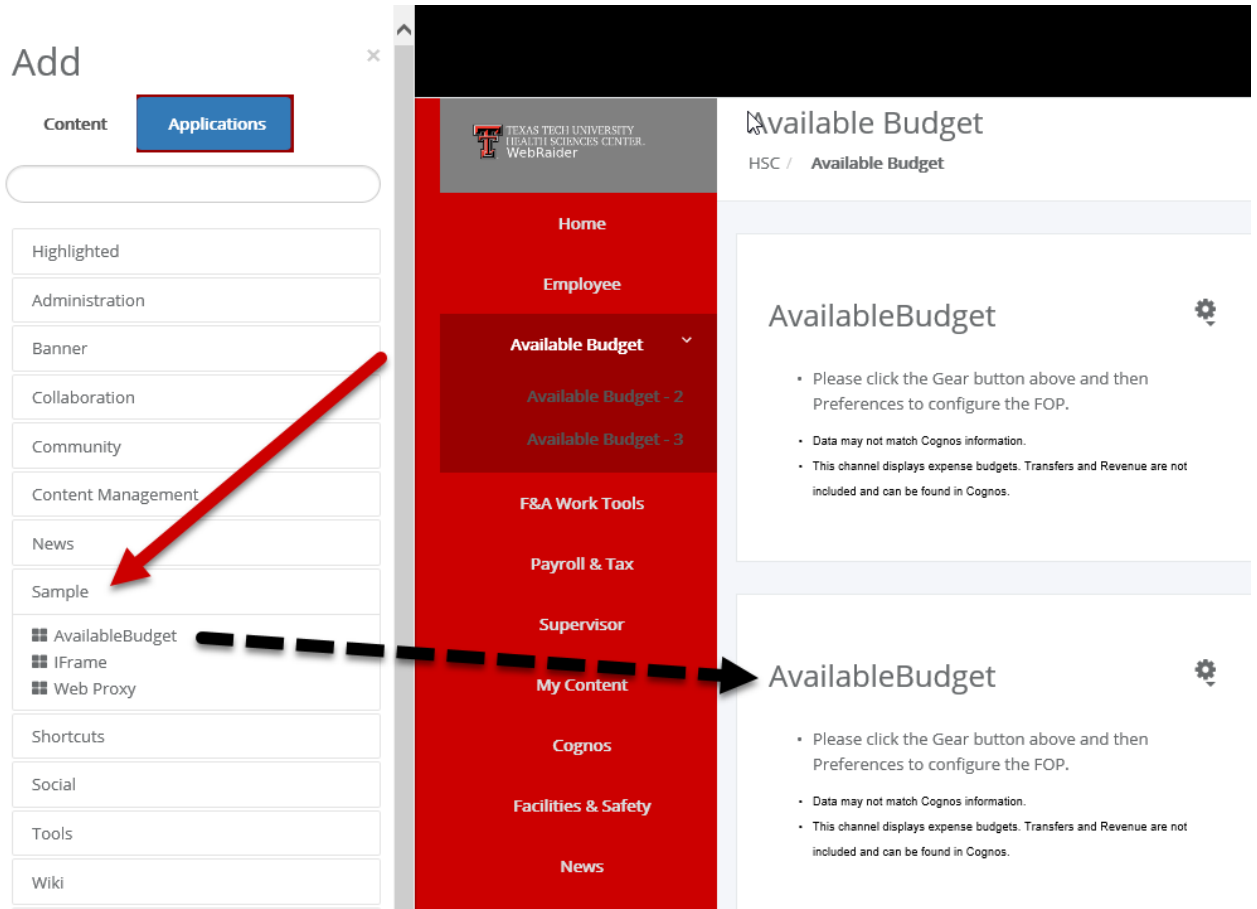
- 6) To add more Available Budget portlets to a page, Click on the Add + button at the top right of the portal.



- 7) Then click on Application

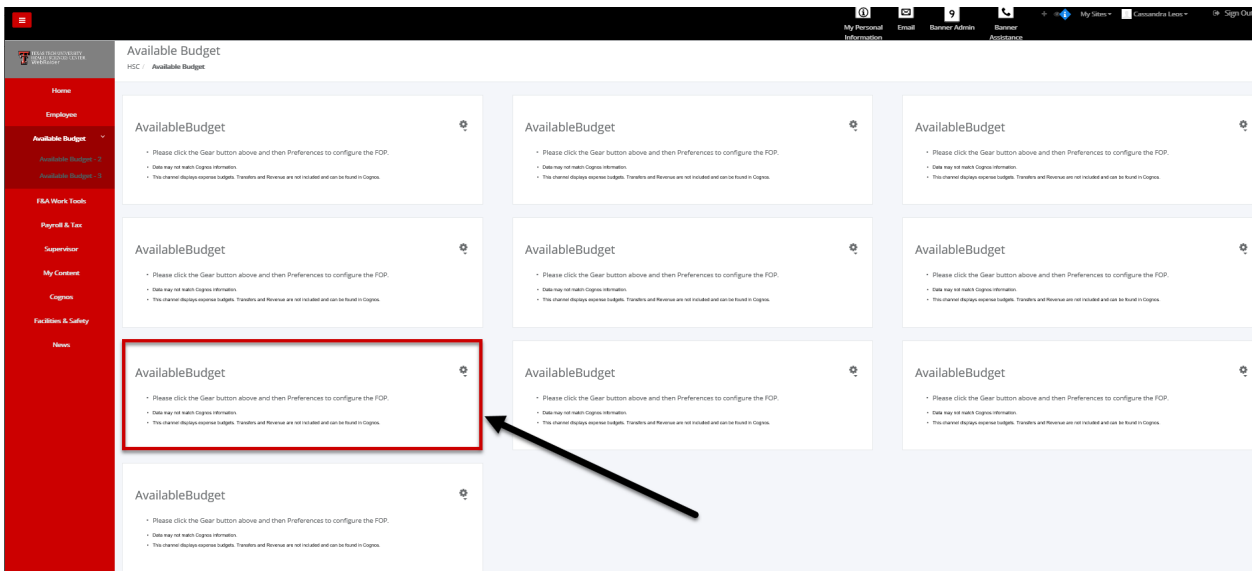


8) Click on Sample and pull the AvailableBudget portlet into the position you would like to see it.



9) Then 'X' out of the window.

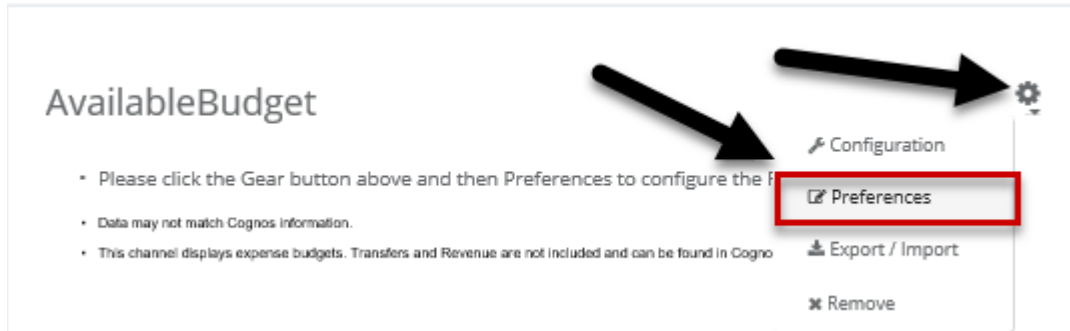
10) The Available Budget portlet you added now appears.



11) To delete any portlet, click on the 'x' in the top right corner of the portlet

Add Banner Funds to Portlets

1) Click on the gear icon in the top right corner of the portlet and Preferences.



2) Add the Current Fiscal Year as two digits. Example: 21

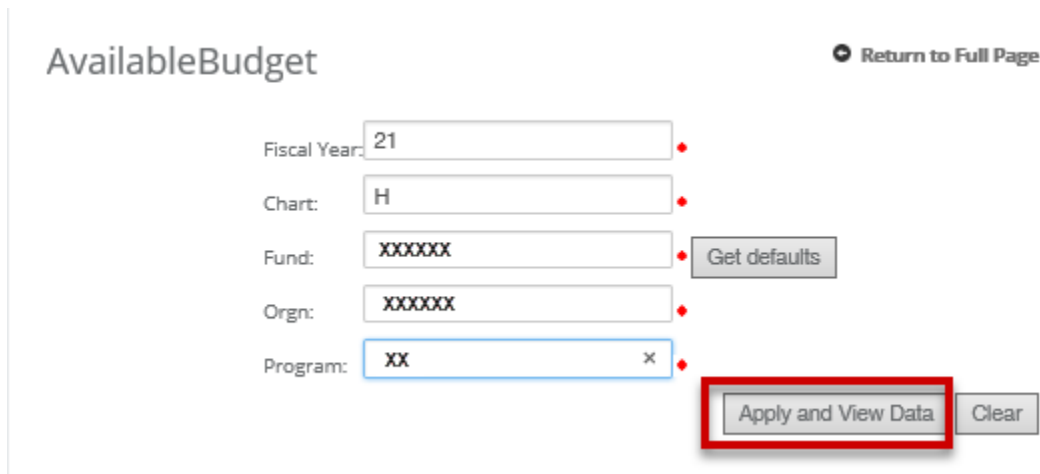
a. This will need to be manually changed at the beginning of each fiscal year to get new fiscal year data.

3) Add the Banner Chart (T, H, E, or S). Generally you will be adding 'H' for Texas Tech University Health Sciences Center.

4) Then add the Fund, Orgn and Program you would like to view. Note: Get defaults button next to the fund is currently unavailable.

5) Then select the Apply and View Data button.

a. If you entered information in error, click on **Clear** to clear the values from the fields and re-enter the correct data.

A screenshot of the 'AvailableBudget' form. The form title is 'AvailableBudget'. In the top right corner, there is a 'Return to Full Page' button. The form contains five input fields: 'Fiscal Year' with the value '21', 'Chart' with the value 'H', 'Fund' with the value 'XXXXXX', 'Orgn' with the value 'XXXXXX', and 'Program' with the value 'XX'. Each input field has a red dot to its right. To the right of the 'Fund' field is a 'Get defaults' button. Below the input fields are two buttons: 'Apply and View Data' (highlighted with a red box) and 'Clear'.

6) Your available budget for the Banner Fund, Orgn, and Program Code combination you entered will now appear in the portlet.

a. An example budget is shown below and contains the following information:

- Budget Account Codes - for HSC codes in the 6000 range are salary expenses and codes in the 7000 range are Non-Salary related expense.
- Title - The description of the budget account code.
- Adjusted Budget - Summary amount of beginning budget for the year, plus or minus any budget adjustments.
- YTD Activity - Summary amount of all year-to-date expenses.
- Commitments - Summary amount of all open encumbrances (POs, General Encumbrances, or Salary Encumbrances).
- Available Balance - Summary amount of Current Adjusted Budget, minus YTD Activity, minus Commitments.
- NOTE: Available Balances include transactions that are in suspense and have not posted to the ledgers.

AvailableBudget



Refresh Data

Fiscal Year: 21
 Chart: H
 Fund: XXXXXX Office of the CIO
 Orgn: XXXXXX CIO Admin Lbk
 Program: XX Academic Support

Account	Title	Adjusted Budget	YTD Activity	Commitments	Available Balance
6002	Staff Salaries	\$98,282.96	\$8,040.06	\$90,242.90	\$0.00
6005	Longevity	\$340.00	\$20.00	\$0.00	\$320.00
6006	Unallocated Salaries	\$1,164.04	\$0.00	\$0.00	\$1,164.04
6007	Payroll Related Costs	\$21,452.00	\$1,745.79	\$0.00	\$19,706.21
7010	Maintenance and Operations	\$12,174.09	\$1,530.30	\$313.98	\$10,329.81
7015	Professional Services	\$148,700.00	\$148,700.00	\$0.00	\$0.00
7017	Communications	\$93,000.00	\$3,766.68	\$8,441.51	\$80,791.81
7020	In State Travel	\$5,000.00	\$0.00	\$0.00	\$5,000.00
7035	Food and Entertainment	\$10,000.00	\$229.25	\$0.00	\$9,770.75
7040	Memberships	\$25,000.00	\$5,187.50	\$0.00	\$19,812.50
7099	Unallocated Expenses	\$15,807.00	\$0.00	\$0.00	\$15,807.00
Total:		\$430,920.09	\$169,219.58	\$98,998.39	\$162,702.12

- Data may not match Cognos information.
- This channel displays expense budgets. Transfers and Revenue are not included and can be found in Cognos.

7) Click on the Refresh Data button to get the most current Available Budget data.

AvailableBudget



Fiscal Year: 21
 Chart: H
 Fund: XXXXXX Office of the CIO
 Orgn: XXXXXX CIO Admin Lbk
 Program: XX Academic Support

Account	Title	Adjusted Budget	YTD Activity	Commitments	Available Balance
6002	Staff Salaries	\$98,282.96	\$8,040.06	\$90,242.90	\$0.00
6005	Longevity	\$340.00	\$20.00	\$0.00	\$320.00
6006	Unallocated Salaries	\$1,164.04	\$0.00	\$0.00	\$1,164.04
6007	Payroll Related Costs	\$21,452.00	\$1,745.79	\$0.00	\$19,706.21
7010	Maintenance and Operations	\$12,174.09	\$1,530.30	\$313.98	\$10,329.81
7015	Professional Services	\$148,700.00	\$148,700.00	\$0.00	\$0.00
7017	Communications	\$93,000.00	\$3,766.68	\$8,441.51	\$80,791.81
7020	In State Travel	\$5,000.00	\$0.00	\$0.00	\$5,000.00
7035	Food and Entertainment	\$10,000.00	\$229.25	\$0.00	\$9,770.75
7040	Memberships	\$25,000.00	\$5,187.50	\$0.00	\$19,812.50
7099	Unallocated Expenses	\$15,807.00	\$0.00	\$0.00	\$15,807.00
Total:		\$430,920.09	\$169,219.58	\$98,998.39	\$162,702.12

- Data may not match Cognos information.
- This channel displays expense budgets. Transfers and Revenue are not included and can be found in Cognos.

If the fund is tied to a grant, you will see an additional field labeled Grant end date. This field contains the grant end date entered in the Finance system and designates the date the grant will end.

AvailableBudget



Refresh Data

Fiscal Year: 21
Chart: H
Fund: XXXXXX PBCS Resident Supp CY16 and Beyond
Orgn: XXXXXX Hospital Contracts Admin Ode
Program: XX Academic Support

Grant end date:01-OCT-20

Account Title	Adjusted Budget	YTD Activity	Commitments	Available Balance
6007 Payroll Related Costs	\$0.00	\$0.00	\$0.00	\$0.00
6008 Other Employee Payments	\$0.00	\$0.00	\$0.00	\$0.00
7010 Maintenance and Operations	\$379.18	\$0.00	\$0.00	\$379.18
7017 Communications	\$0.00	\$0.00	\$0.00	\$0.00
7035 Food and Entertainment	\$96.00	\$0.00	\$0.00	\$96.00
7050 Capital Outlay	\$300.00	\$0.00	\$0.00	\$300.00
7099 Unallocated Expenses	\$118,005.35	\$0.00	\$0.00	\$118,005.35
Total:	\$118,780.53	\$0.00	\$0.00	\$118,780.53

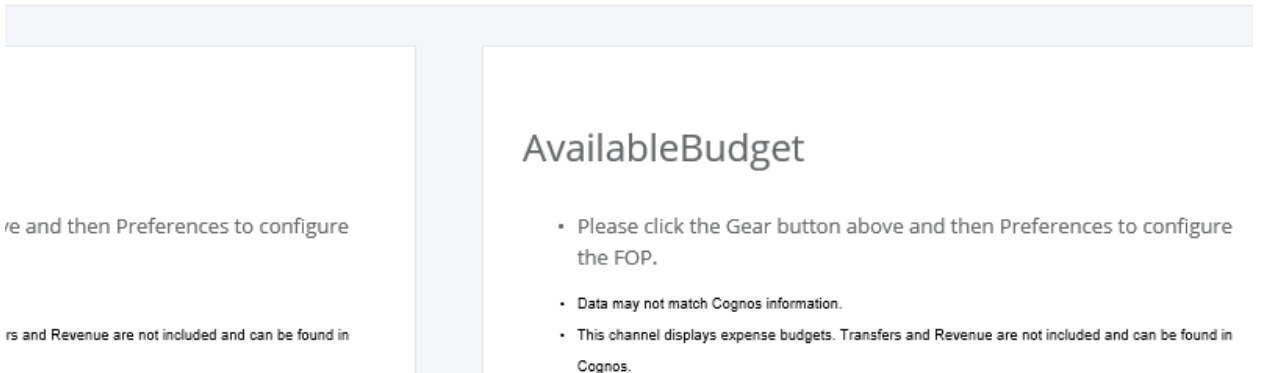
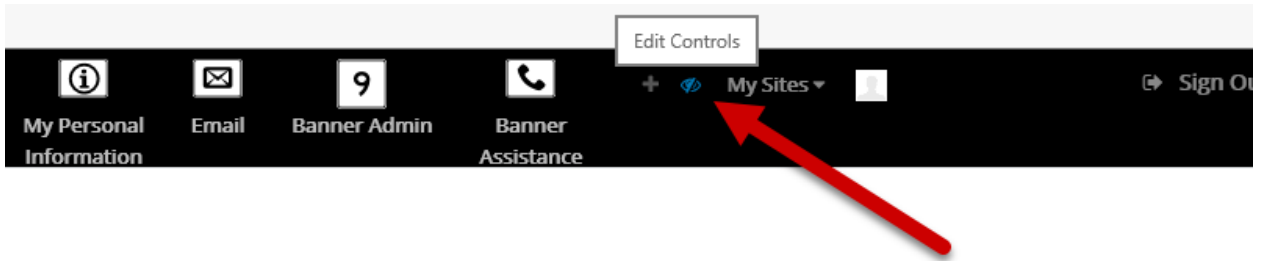
- Data may not match Cognos information.
- This channel displays expense budgets. Transfers and Revenue are not included and can be found in Cognos.

Adding additional FOPs to Available Budget Portlets


- 1) To add additional FOPs to other Available Budget portlets and pages repeat steps under “Add Banner Funds to Portlets”.

Missing Gears; Customize Available Budget Portlet

- 1) To customize, or if your gears are missing from the Available Budget portlet, look for the “Edit Controls” button at the top right of the portal. Note: it looks like an eye.



2) Once clicked, the gear icon will appear on the top right corner of all of your portlets.

Note: When the  is activated you will have the option to "View Default Page"; this version will not let you customize your portlets.

