Create Budget Account Group

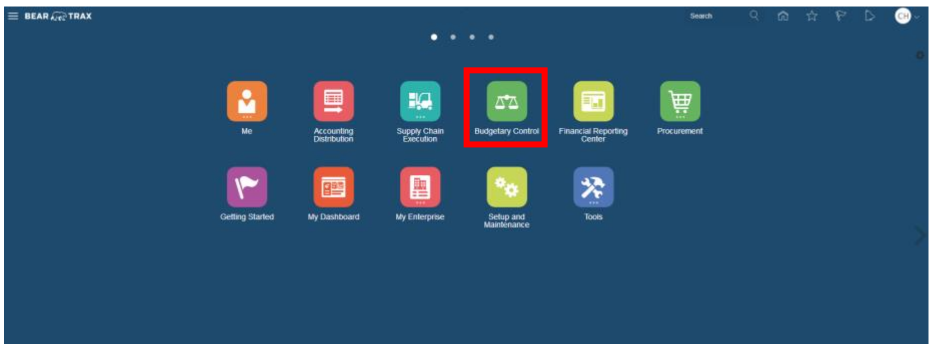
All Employees

Intro

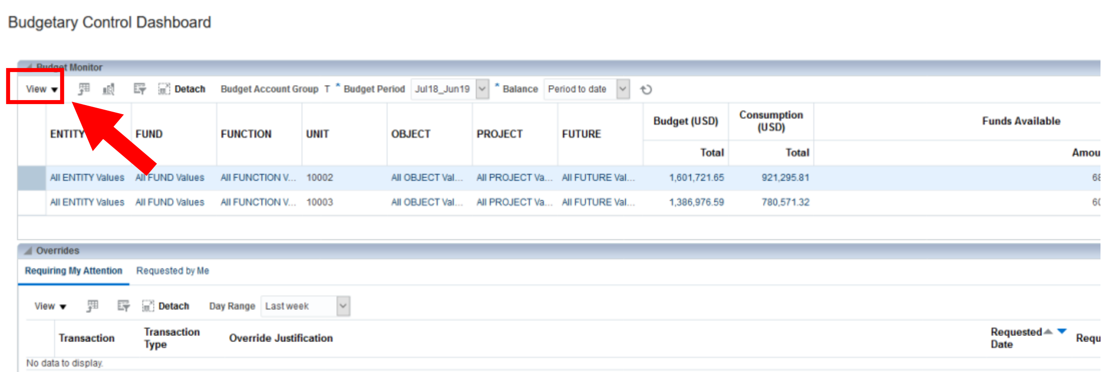
Purpose: To learn how to customize the Budgetary Control Dashboard on BearTrax.

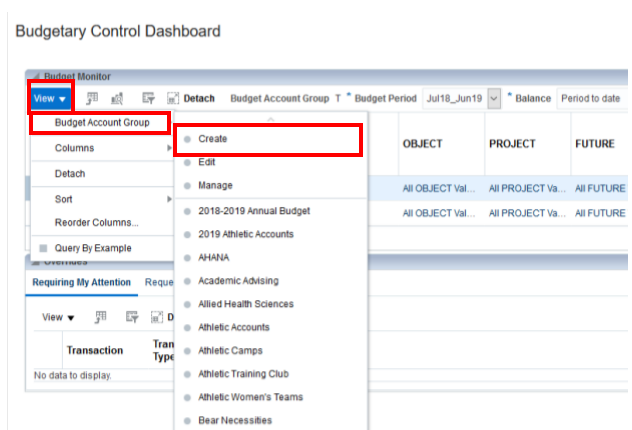
How to Access: Follow these instructions to create a Budgetary Control Dashboard.

1. Access your Budgetary Control Dashboard by clicking on the Budgetary Control tile.



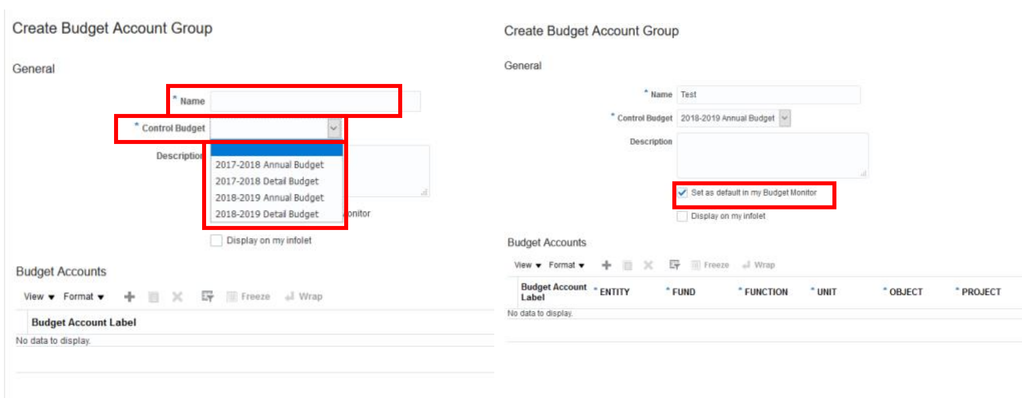
2. From the Dashboard page, select ***View*** – ***Budget Account Group*** – ***Create.***



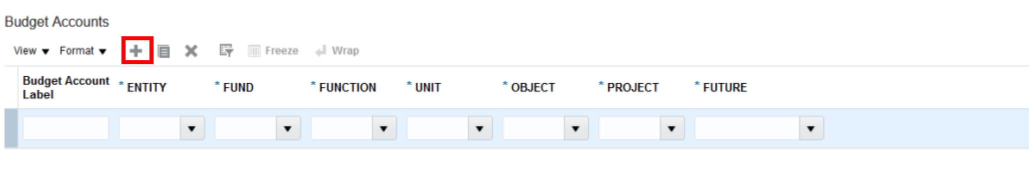


3. On the **Create Budget Account Group** page, enter **Name** and select the **most current** budget for **Control Budget.**

***Note:** You will also want to check the box *Set as default in my Budget Monitor.*



4. Under **Budget Accounts,** click the to add a budget account line below.



5. Enter the required data (Entity, Fund, Function, Unit, Object, Project, and Future).

***Note:** You can select the drop-down arrow and select desired code. You can also key the codes in directly, but you must hit **Enter** for it to recognize what you entered. Also, to duplicate a line you can select the (to the right of the add button).

6. Click **Save and Close** to view your *Budget Account Group* on the *Budget Monitor*.