

Create Budget Account Group

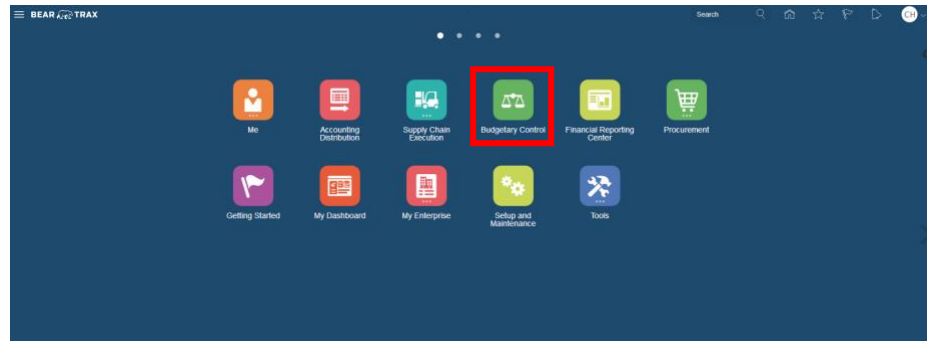
All Employees

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.

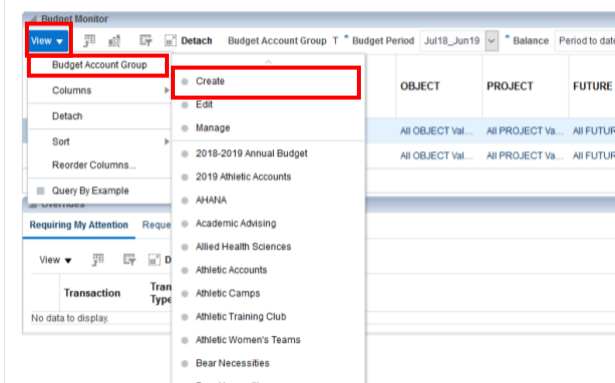


2. From the Dashboard page, select **View – Budget Account Group – Create**.

Budgetary Control Dashboard

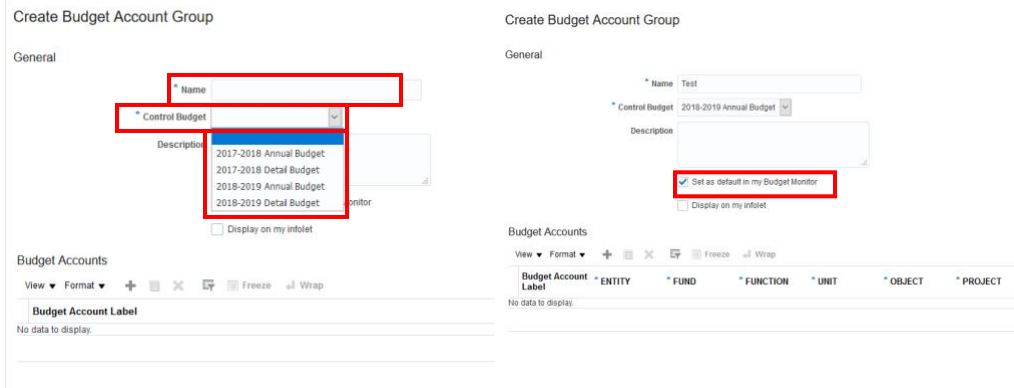
Budget Monitor												
View ▾ [Icons] [Icons] [Icons] Detach Budget Account Group T * Budget Period Jul18_Jun19 * Balance Period to date												
ENTITY	FUND	FUNCTION	UNIT	OBJECT	PROJECT	FUTURE	Budget (USD)		Consumption (USD)		Funds Available	
							Total	Total	Total	Total	Amou	
All ENTITY Values	All FUND Values	All FUNCTION V...	10002	All OBJECT Val...	All PROJECT Va...	All FUTURE Val...	1,601,721.65	921,295.81				6E
All ENTITY Values	All FUND Values	All FUNCTION V...	10003	All OBJECT Val...	All PROJECT Va...	All FUTURE Val...	1,386,976.59	780,571.32				6C

Budgetary Control Dashboard



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

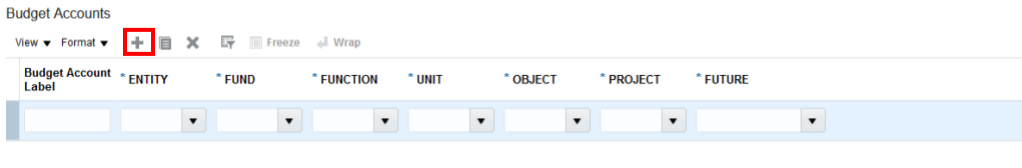
***Note:** You will also want to check the box *Set as default in my Budget Monitor*.



The left screenshot shows the 'Create Budget Account Group' form with the 'General' section. The 'Name' field is highlighted in red. Below it, the 'Control Budget' dropdown menu is open, showing options: '2017-2018 Annual Budget', '2017-2018 Detail Budget', '2018-2019 Annual Budget', and '2018-2019 Detail Budget'. The '2018-2019 Annual Budget' option is highlighted in blue. Below the dropdown, there is a checkbox for 'Display on my infolet'.


The right screenshot shows the same form with the 'Name' field containing 'Test' and the 'Control Budget' dropdown set to '2018-2019 Annual Budget'. The 'Set as default in my Budget Monitor' checkbox is checked and highlighted in red. Below it, there is a checkbox for 'Display on my infolet'.

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

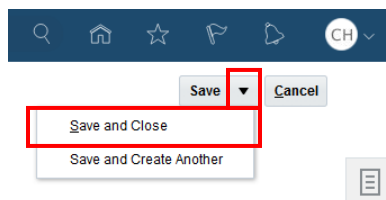


The screenshot shows the 'Budget Accounts' section. At the top, there are icons for 'View', 'Format', '+', 'X', 'Freeze', and 'Wrap'. Below these icons is a table with the following columns: 'Budget Account Label', 'ENTITY', 'FUND', 'FUNCTION', 'UNIT', 'OBJECT', 'PROJECT', and 'FUTURE'. A red box highlights the '+' button to the right of the 'View' icon.

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*.



The screenshot shows a 'Save' dropdown menu. The 'Save' button is highlighted in red. The dropdown menu is open, showing three options: 'Save and Close', 'Save and Create Another', and 'Cancel'. The 'Save and Close' option is highlighted in red.