Edit Budget Account Group

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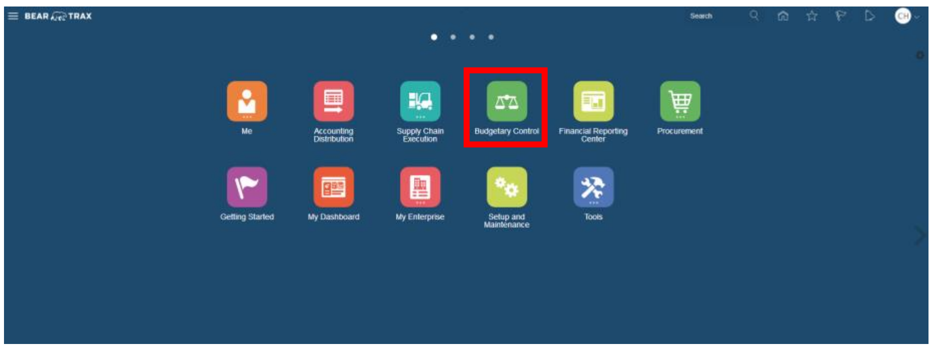
All Employees

Intro

Purpose: To learn how to edit a Budget Account Group on BearTrax.

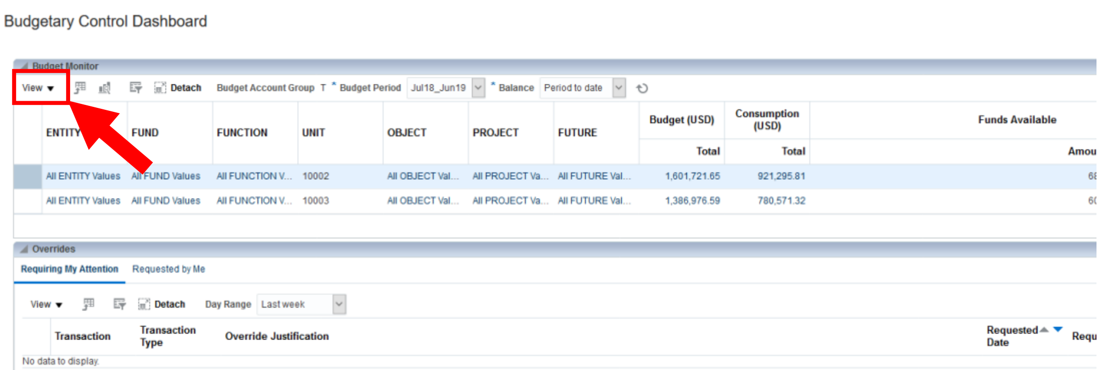
How to Access: Follow these instructions to edit a Budgetary Control Dashboard.

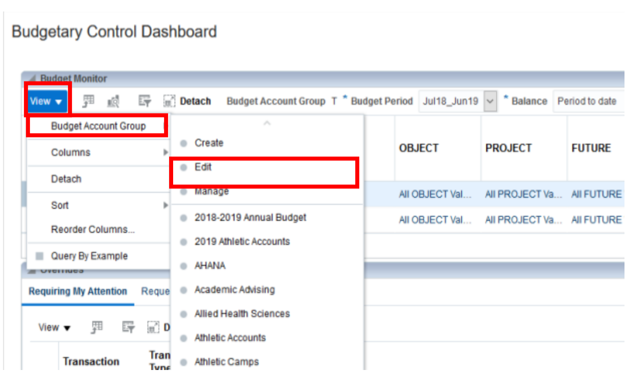
1. Access your Budgetary Control Dashboard by clicking on the Budgetary Control tile.



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

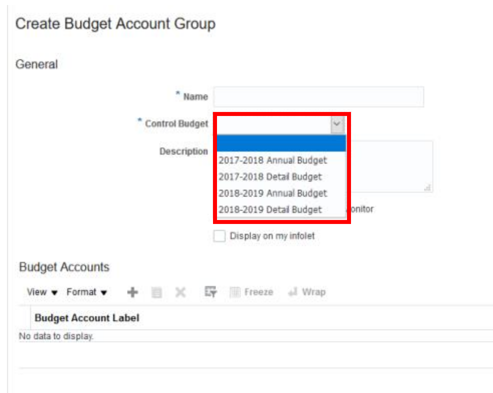
*__Note:__ The budget account group currently visible will be edited. If multiple groups need adjusted, you will have to first select the group from the budget account group list and follow the steps again.

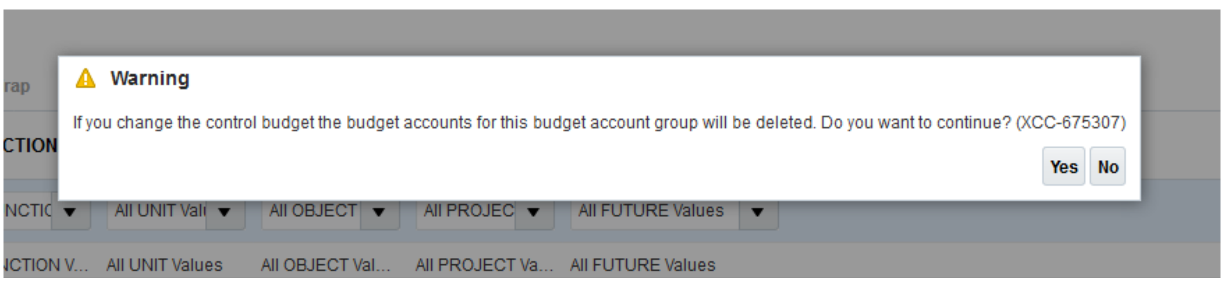




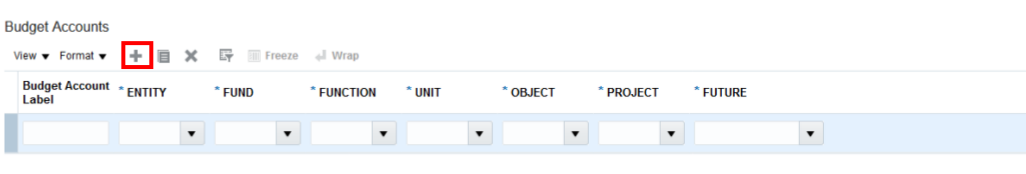
3. On the **Edit Budget Account Group** page, you can modify the fields (Name, Control Budget, Description).

Note:** If you select a different ***Control Budget the budget accounts will be deleted. A warning will pop up as well, you will click **Yes** to proceed. You will have to add Budget Account lines and enter the required data again (see step 4).





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 *Updated Budget Account Group* on the *Budget Monitor*.