TOWSON UNIVERSITY | University Budget Office

Stratus Budget Monitor Tips and Tricks

Contents

Budget Monitor Tips and Tricks 2

- **Hiding Columns** 2
- **Adding Columns** 2
- **Export** 2
- **Narrow Results** 2
- **Deleting Old Budget Account Groups** 2
- **Selecting Accounts for the Budget Monitor** 2

Budget Monitor Tips and Tricks

Hiding Columns

All chartfields are required when establishing a Budget Monitor. Users can hide columns on the monitor after it is established. To change the view: Budget Monitor/View/Columns.

Adding Columns

By default, descriptions are not displayed. You can add additional columns however to show them.

While on your Budget Monitor, select view/columns – then check the boxes next to what columns you want to see.

Export

Users can also work with the data on their screen in Excel by using the Export to Excel feature.

Narrow Results

If the Budget Monitor was set at a high level, users can drill down into data, and then search on specific items. Example – Budget Monitor is set for All Expense Accounts. User drills down on Expenses, but only wants to see 603003. Enter the account number is the search box above Account. When finished, select 'Done' to return to main Budget Monitor.

Deleting Old Budget Account Groups

If there are Account Groups that are no longer needed, select View/Manage. Highlight the row no longer needed, and select the 'X' to delete.

Selecting Accounts for the Budget Monitor

Any Parent Level (Parent 5 – REVALL; Parent 2 – RIT001 etc) can be used when setting up a budget monitor. Users may also opt to set up individual accounts (child accounts not listed here). The child accounts are where expenses/revenues post. This allows each user to customize their view to meet their specific needs.

Any level listed can be used as an account to set up a Budget Monitor						
Parent5	Parent4	Parent3	Parent2	Parent1	Child	Description
REVALL						All Revenue
	R40000					Revenues
		RTF001				Tuition and Fees
			R1T001			All Tuition
				R1T010		Tuition Traditional
				R1T015		Tuition Differential
				R1T020		Tuition Other
			R2F001			All Fees
				R2F010		Educational Fees
				R2F020		College Lab Fees

				R2F030		Study Abroad Fees
				R2F040		Other Fees
		RVS001				Revenue Non Tuition and Fee
			RVS010			Sales/Services of Educational activities
				RVS100		Education and General Revenue
			RVS020			Other External Revenue/Appropriation
				RVS200		Federal Grants and Contracts
				RVS210		Federal Appropriation
				RVS215		State Grants and Contracts
				RVS220		Univ Of MD Revenues
				RVS225		Private gifts, grants and contracts
				RVS230		Local Appropriation
		RVX001				Auxiliary Revenues
			RVX010			Auxiliary Revenue Activities
				RVX100		Auxiliary COVID
				RVX110		Auxiliary Housing Revenue
				RVX120		Auxiliary Dining Revenue
				RVX130		Auxiliary Parking Revenue
				RVX140		Other Auxiliary Revenue
		RVY001				Other Revenue Sources
			RVY010			Other Revenue
				RVY100		Other operating revenues
				RVY110		State Appropriation
				RVY115		Pell Grant
				RVY120		Gifts
				RVY125		Investment Income
				RVY130		Other non operating revenue(expenses)
				RVY135		Transfers To/From other USM Institutions
				RVY140		Capital Appropriation
				RVY145		Capital Gifts
				RVY150		GASB Mandatory Transfers
XPSALL						Total Expenses
	XP5000					Salaries, Wages and Fringe
		XP5001				Regular Salaries, Wages and Fringe
			XP1000			Reg Salary, Wages Budget Checking
				XR1000		Regular Salaries and Wages
			XP1100			Reg Fringe Budget Checking
				XR1100		Regular Fringe Benefits
			XP1600			Overtime Budget Checking
				XR1600		Regular Overtime
			XP1700			Shift Differential Budget Checking
				XR1700		Regular Shift Differential
			XP1800			Regular Tuition Waivers Budget Checking

				XR1800		Tuition Waiver
		XP5002				OBJ 2 Salary and Benefits
			XP2000			Contractual Salary Budget Checking
				XR2000		Contractual Salary and Payment
				XR2100		Other Contractual Salary
			XP2200			Contractual Fringe Budget Checking
				XR2200		Contractual Fringe Benefits
			XP2300			Tuition Waiver Contractual Budget Checking
				XR2300		Tuition Waivers Contractual
			XP2400			PT Faculty Budget Checking
				XR2400		Part Time Faculty
			XP2500			Grant Contractual Salary Budget Checking
				XR2500		Contractual Grant
			XP2600			Regular Student Help Budget Checking
				XR2600		Student Help
			XP2700			Grad Assistant Budget Checking
				XR2700		Graduate Assistant
			XP2900			Default Contractual Budget Checking
				XR2900		Contractual Default
	XP6000					Total Operating Objects 3-14
		XP6003				Operating Objects 3-14
			XP6030			Budget Check Communications
				XR6030		Postage
				XR6031		Telephones
			XPOPER			Budget Check Operating 4-14
				XR6040		Travel
				XR6060		OBJ 06-Fuel and Utilities
				XR6070		OBJ 07-Motor Vehicles
				XR6080		OBJ 08-Contractual Services
				XR6090		OBJ 09-Supplies and Materials
				XR6100		OBJ 10-Equipment Replacement
				XR6110		OBJ 11-Addl Equipmnt Furniture
				XR6120		OBJ 12-Grnt Subsidy Contribute
				XR6130		OBJ 13-Fixed Charges
				XR6140		OBJ 14-Land and Structure
				XR6190		Recoveries
				XR6990		Perkins Loan/Endowment
				XR6999		Internal IDC Node