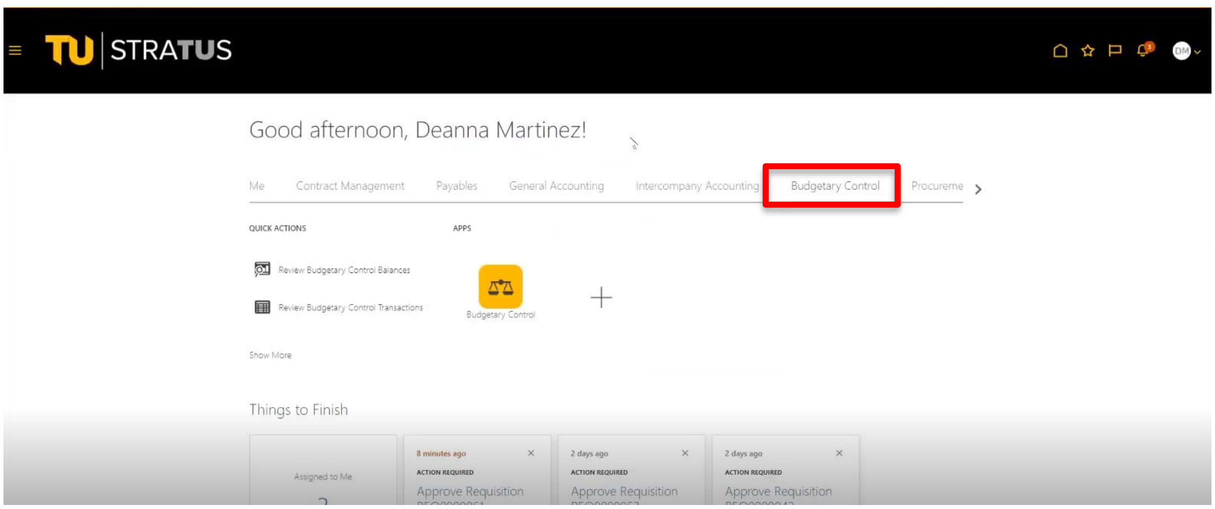
Budget Transfers & Review – Create Budget Monitor

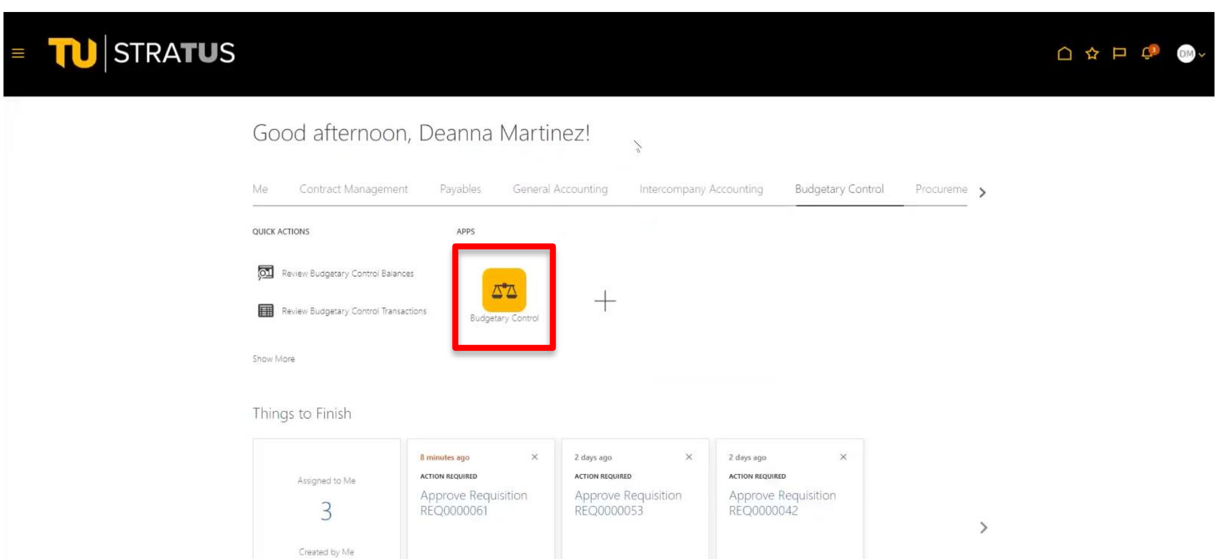
For employees creating a budget monitor.

Purpose:	Create a budget monitor.
How to Access:	Log into the Stratus application. Select the **Budgetary Control** application from the Navigator.
Helpful Hints:	Be sure to keep in mind that… • Supporting documents can be attached.
Procedure:	Complete the following steps to create a budget monitor:

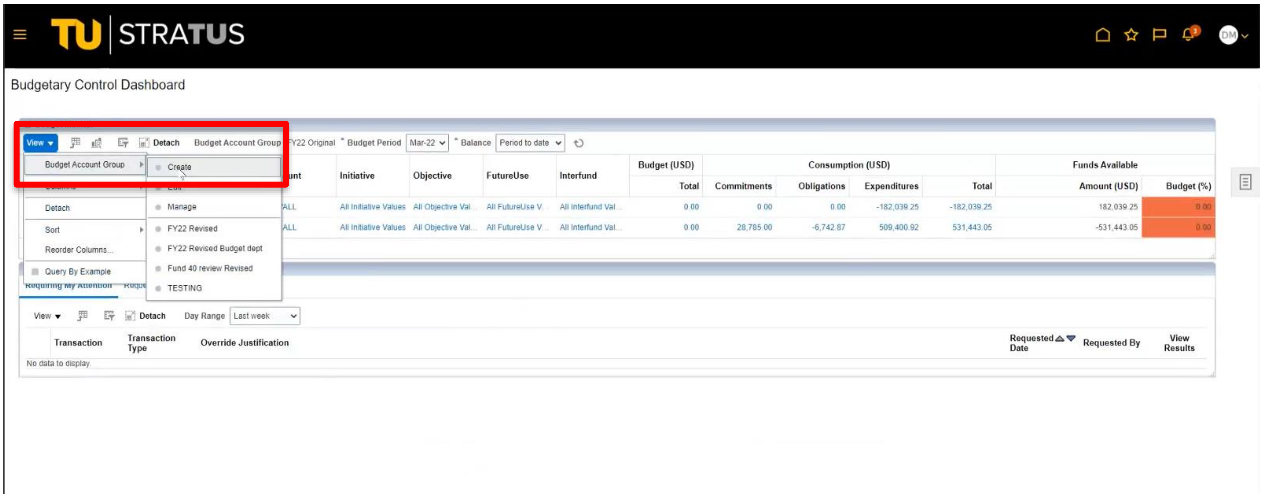
1. On the homepage, select **Budgetary Control** from the sliding menu in the center of the screen.



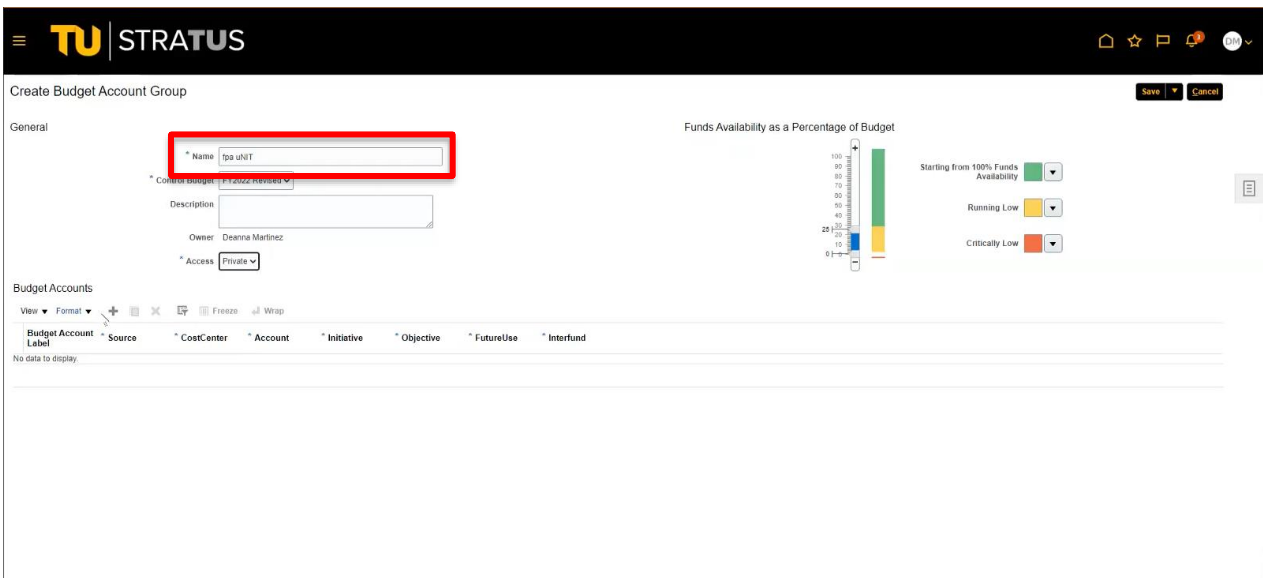
2. Under Budgetary Control, select the **Budgetary Control** tile.



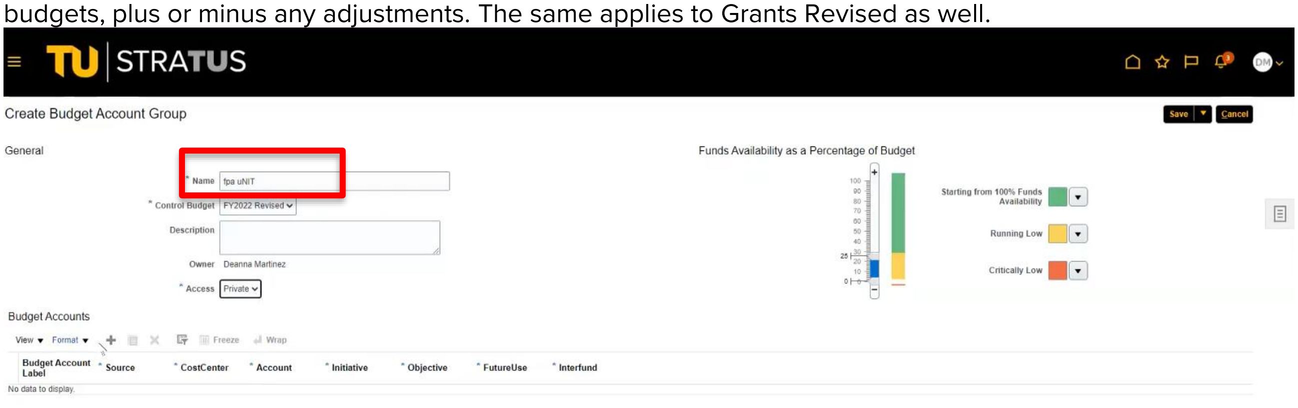
3. To create a budget monitor, select **View**, **Budget Account Group**, and **Create**.



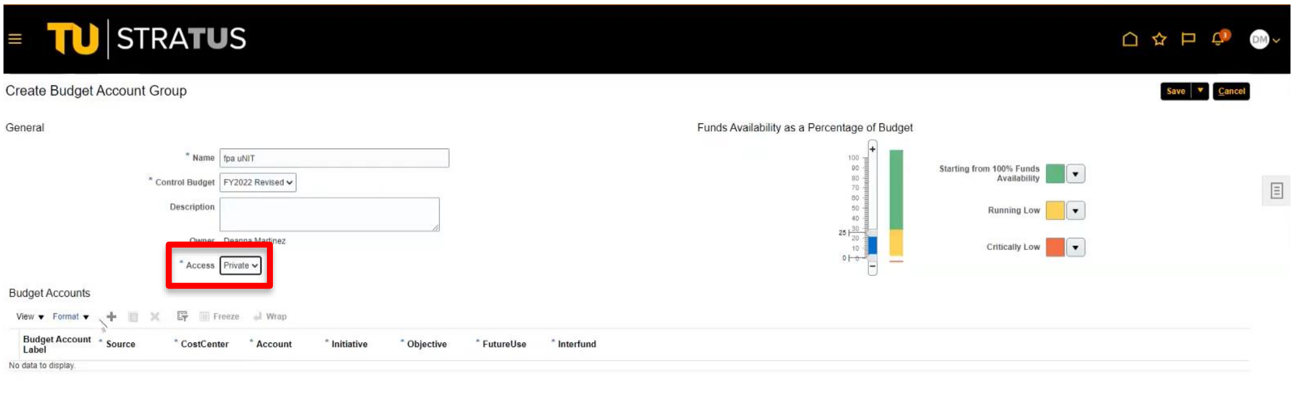
4. Name the view in a way that will allow you to easily identify it. The system will not allow duplicate values (even if private), best practice is start or end with your initials.



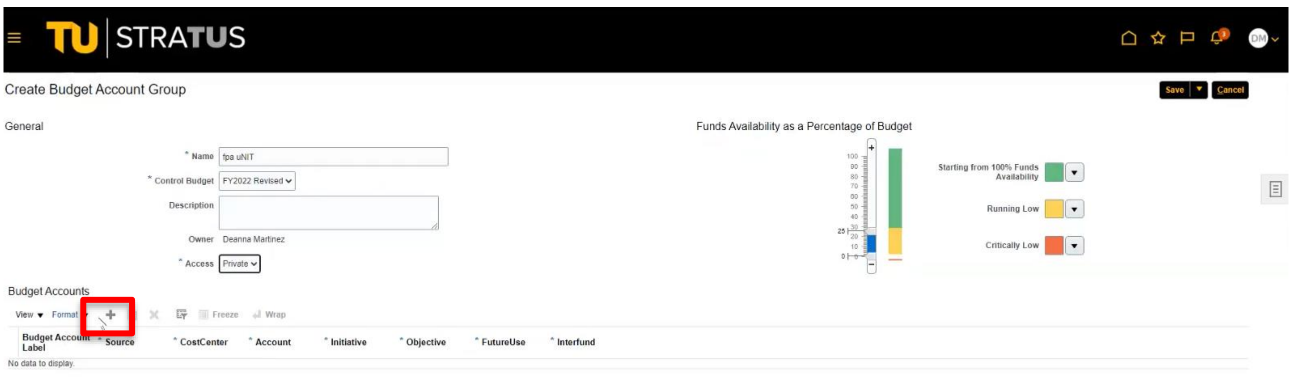
5. Select the control budget that you want to view. Towson Revised will show the combination of original budgets, plus or minus any adjustments. The same applies to Grants Revised as well.



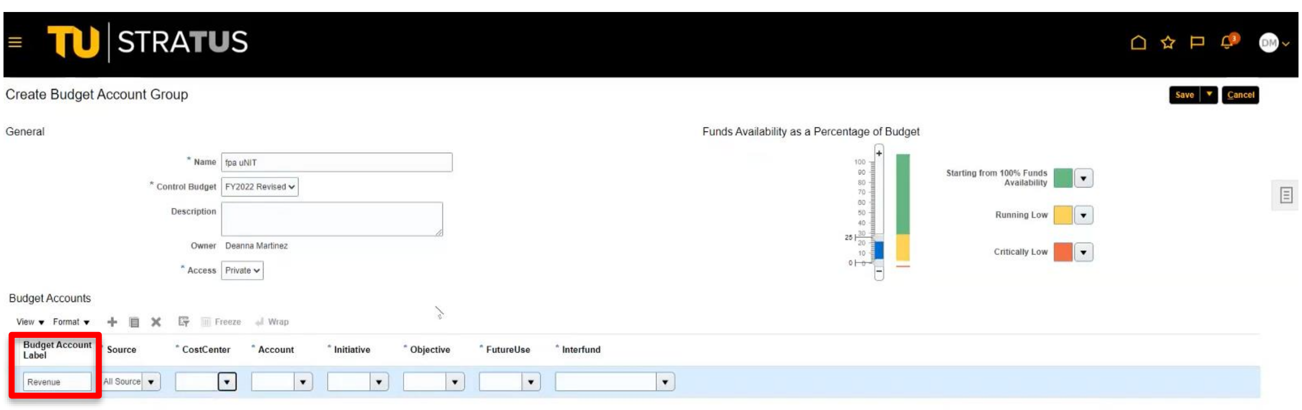
6. Make your access **private** (**NOTE**: Public views can be edited and saved by anyone).



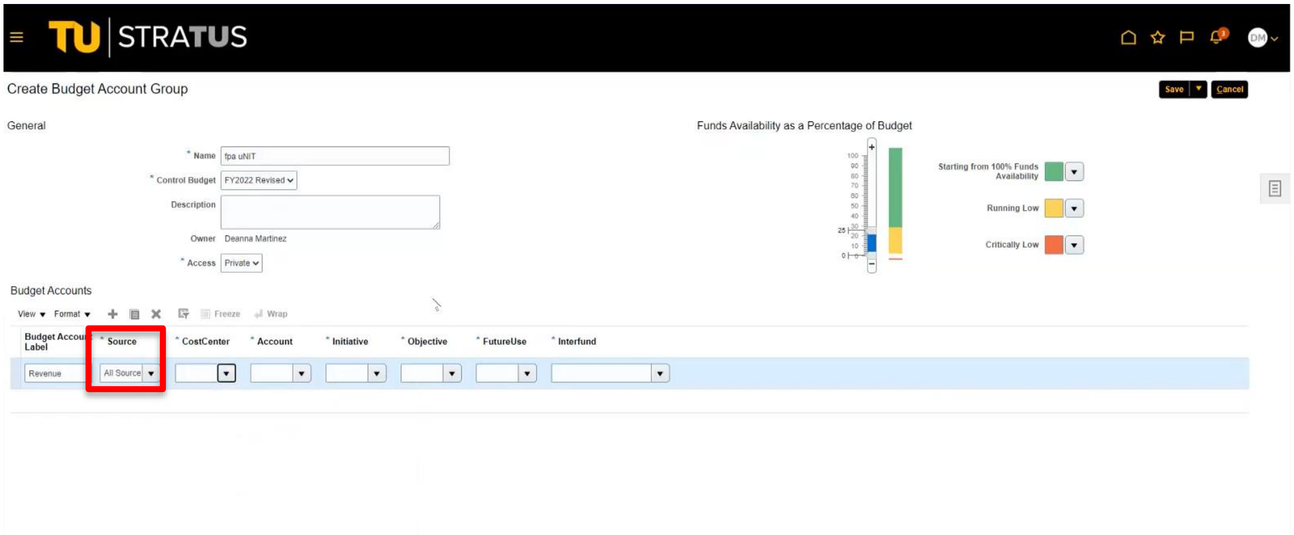
7. To create your **Budget Account Label**, click the plus **(+)** sign to add a row. Users should determine ahead of time the level of data you want to view. There are many views available.



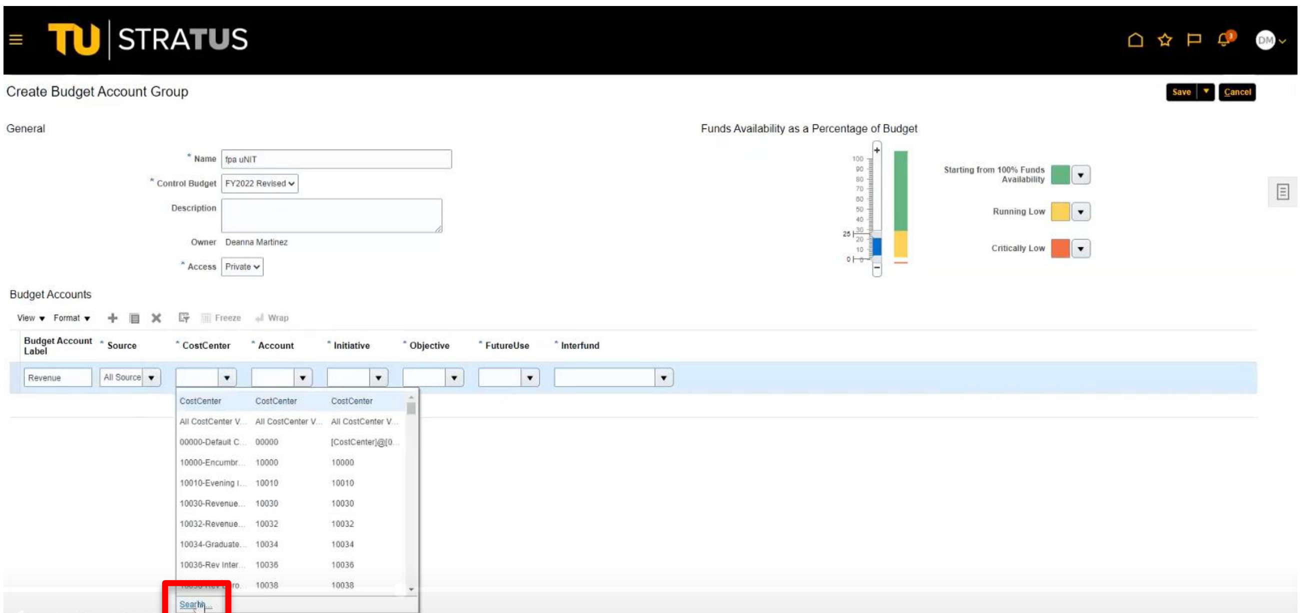
8. The **Budget Account Label** field is freeform, you can name it anything you'd like that will help you identify what it is you're looking at in your data set. (**NOTE**: For this example, we will use Revenue.)

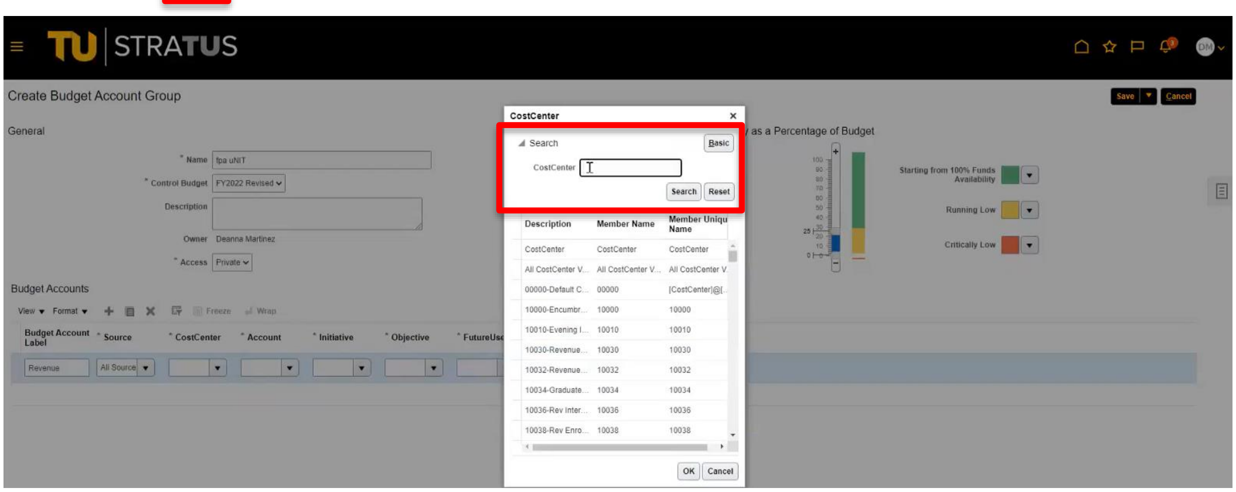


9. Enter the Source for your Budget Monitor. You may also select "All Source Values" and then narrow down your search in the additional fields.

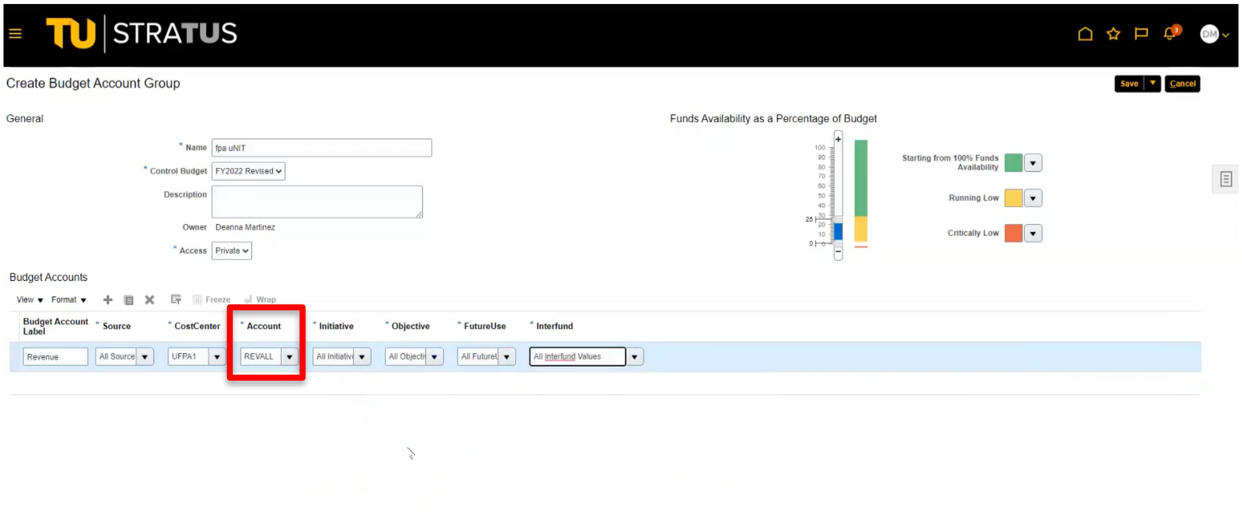


10. Enter your Cost Center Unit Department or Subdivision value. If you do not know the value, select the drop down and search. Search for the Cost Center. Best practice is choosing the LAST value shown in the dropdown list. Select it to highlight it blue, then click **OK**.

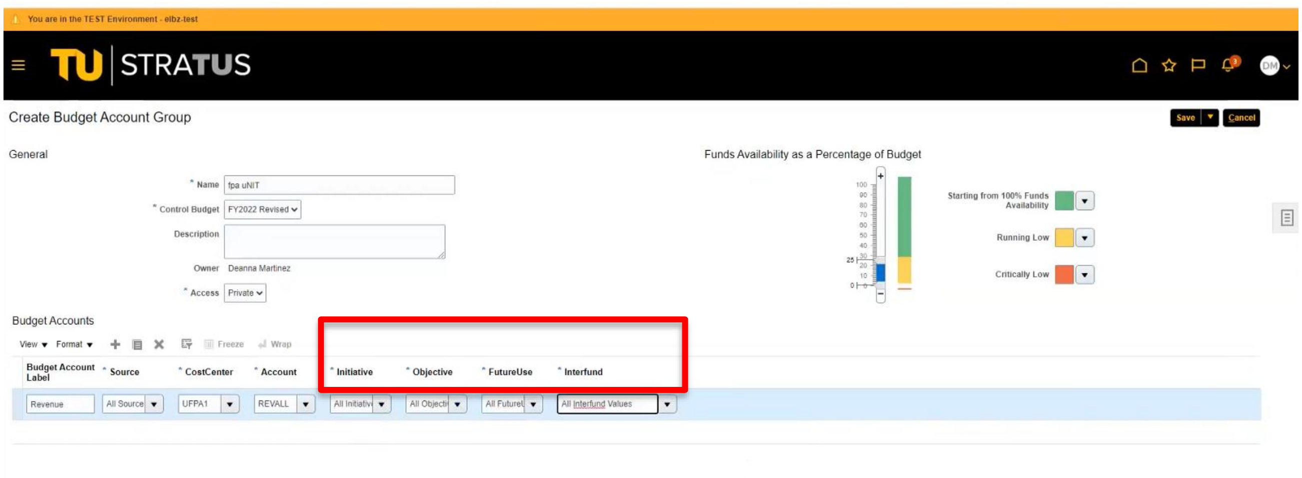




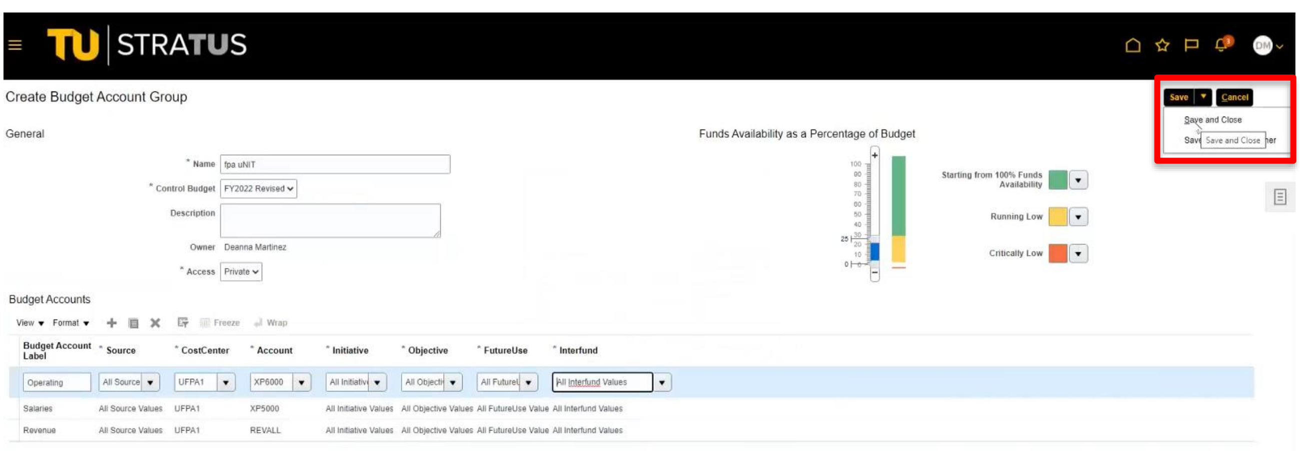
11. For the Account field select which level you want to see. Tip: REVALL rolls up all revenue accounts to one level. XPSALL rolls up all expenses.



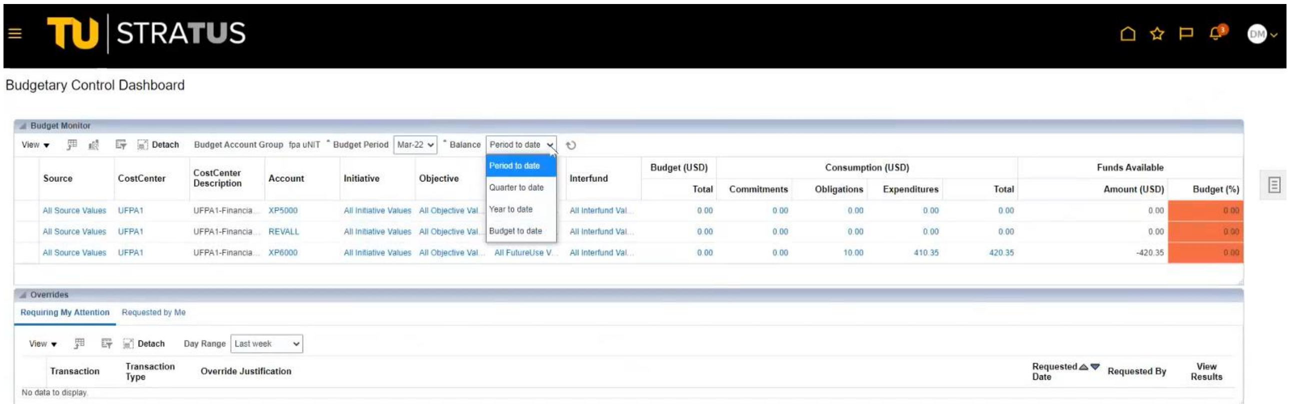
12. For **Initiative**, **Objective**, **Future Use**, and **Interfund** fields, select the corresponding drop down and select **All Values** for each of the fields, unless you are searching for a specific Initiative or Objective.



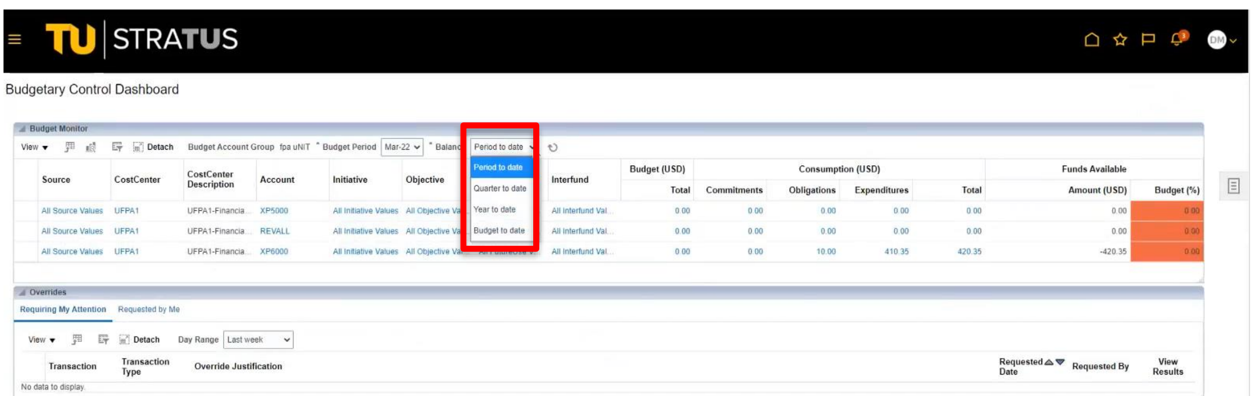
13. When you are finished adding rows, select **Save and Close**.



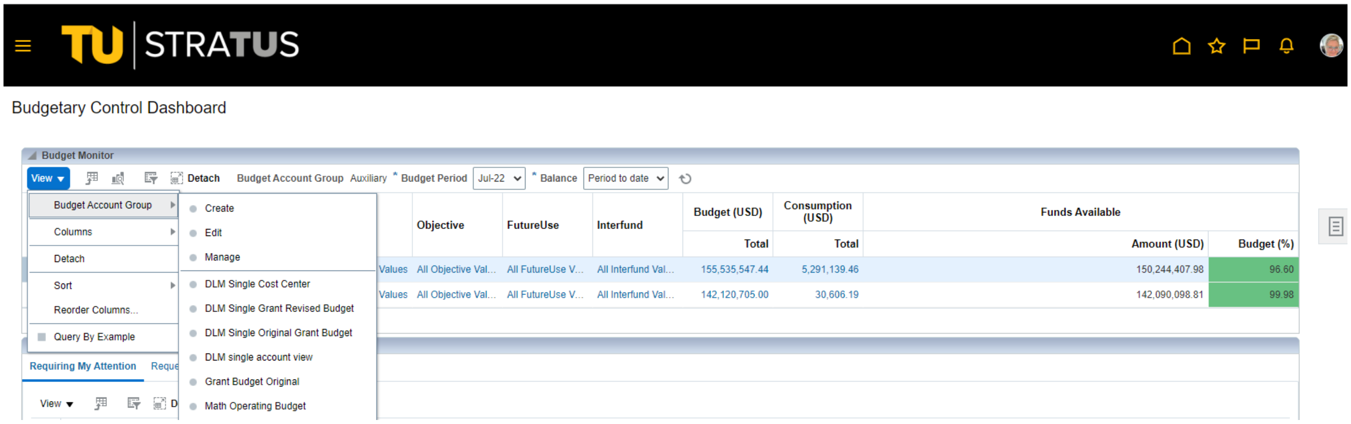
14. You will then be routed to the budget monitor you have just established.



15. The system defaults to Period to Date. To view your criteria in cumulative, select the drop down for the balance and select Year to Date to see where you are overall.



To switch between Budget Monitors, or edit an existing Monitor, select View/Budget Account Group.



Tips:

Anything in blue lettering allows you to view more details about that specific field. (i.e., this could show you multiple cost centers that are rolling up into our unit level.)