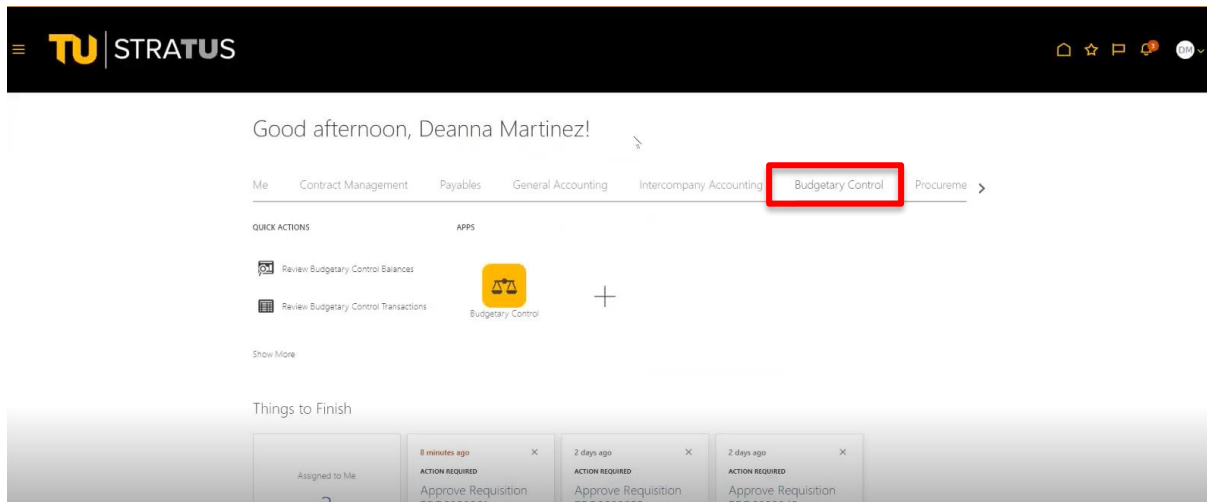


Budget Transfers & Review – Create Budget Monitor

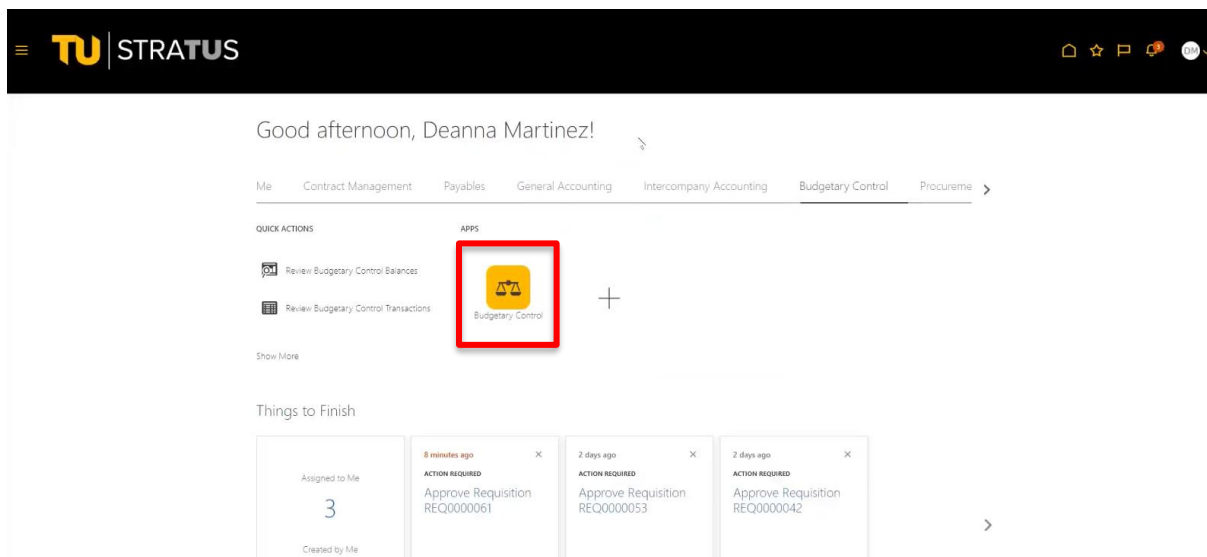
For employees creating a budget monitor.

- 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.



Budget Transfers & Review – Create Budget Monitor

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

The screenshot shows the 'Budgetary Control Dashboard' in the STRATUS system. The 'View' dropdown menu is open, and the 'Budget Account Group' option is selected, which has further opened a sub-menu where the 'Create' option is highlighted with a red box. The dashboard includes a table with columns for Budget (USD), Consumption (USD), and Funds Available. The table shows data for various budget items, including 'FY22 Revised' and 'FY22 Revised Budget Dept'.

- 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.

The screenshot shows the 'Create Budget Account Group' form. The 'Name' field is highlighted with a red box and contains the text 'tpa uNIT'. The form includes a 'Description' field, an 'Owner' field (Deanna Martinez), and an 'Access' dropdown menu set to 'Private'. On the right side, there is a 'Funds Availability as a Percentage of Budget' chart and three status indicators: 'Starting from 100% Funds Availability' (green), 'Running Low' (yellow), and 'Critically Low' (red).

- 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.

The screenshot shows the 'Create Budget Account Group' form. The 'Control Budget' dropdown menu is highlighted with a red box and is set to 'FY2022 Revised'. The 'Name' field contains 'tpa uNIT'. The form includes a 'Description' field, an 'Owner' field (Deanna Martinez), and an 'Access' dropdown menu set to 'Private'. On the right side, there is a 'Funds Availability as a Percentage of Budget' chart and three status indicators: 'Starting from 100% Funds Availability' (green), 'Running Low' (yellow), and 'Critically Low' (red).

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

Budget Transfers & Review – Create Budget Monitor

General

* Name tpa UNIT

* Control Budget FY2022 Revised

Description

Owner Deanna Martinez

* Access Private

Funds Availability as a Percentage of Budget

Starting from 100% Funds Availability

Running Low

Critically Low

Budget Accounts

View Format + - Freeze Wrap

Budget Account Label	Source	CostCenter	Account	Initiative	Objective	FutureUse	Interfund
No data to display.							

- 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.

General

* Name tpa UNIT

* Control Budget FY2022 Revised

Description

Owner Deanna Martinez

* Access Private

Funds Availability as a Percentage of Budget

Starting from 100% Funds Availability

Running Low

Critically Low

Budget Accounts

View Format + - Freeze Wrap

Budget Account Label	Source	CostCenter	Account	Initiative	Objective	FutureUse	Interfund

- 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.)

General

* Name tpa UNIT

* Control Budget FY2022 Revised

Description

Owner Deanna Martinez

* Access Private

Funds Availability as a Percentage of Budget

Starting from 100% Funds Availability

Running Low

Critically Low

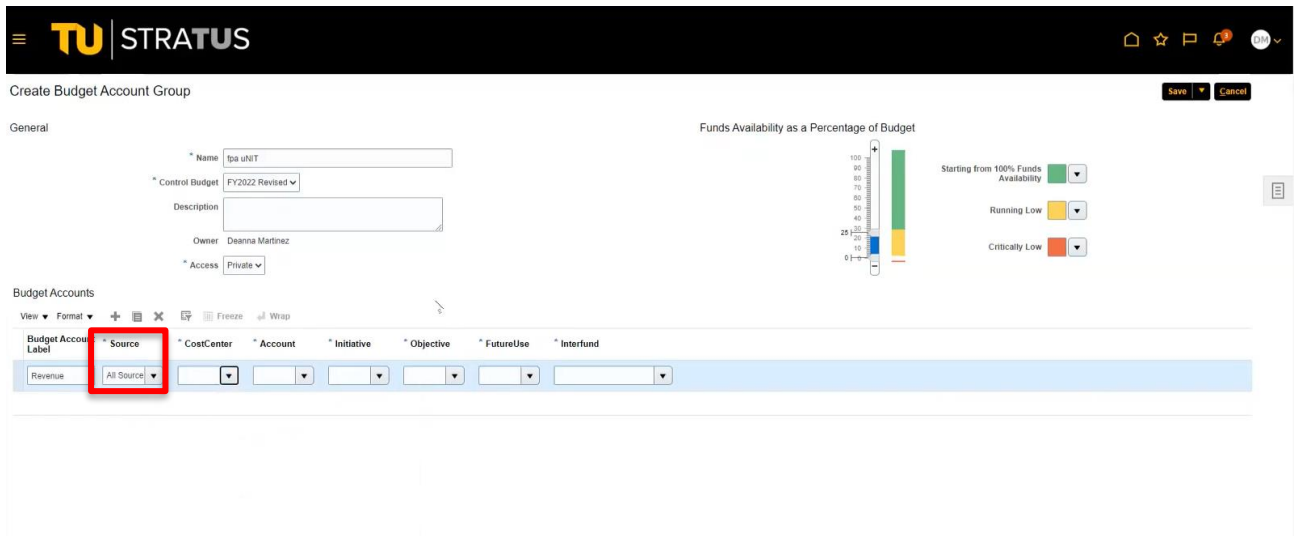
Budget Accounts

View Format + - Freeze Wrap

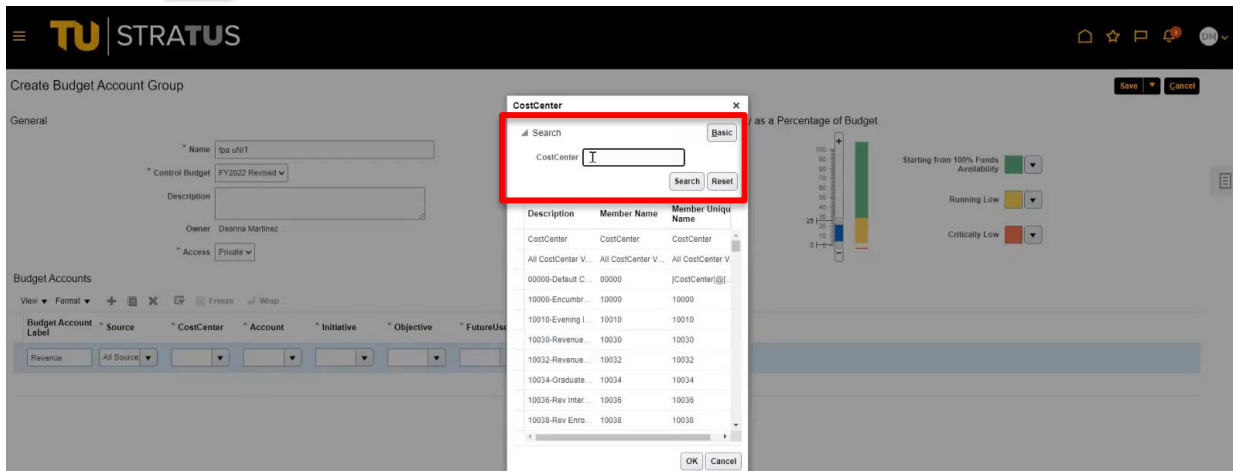
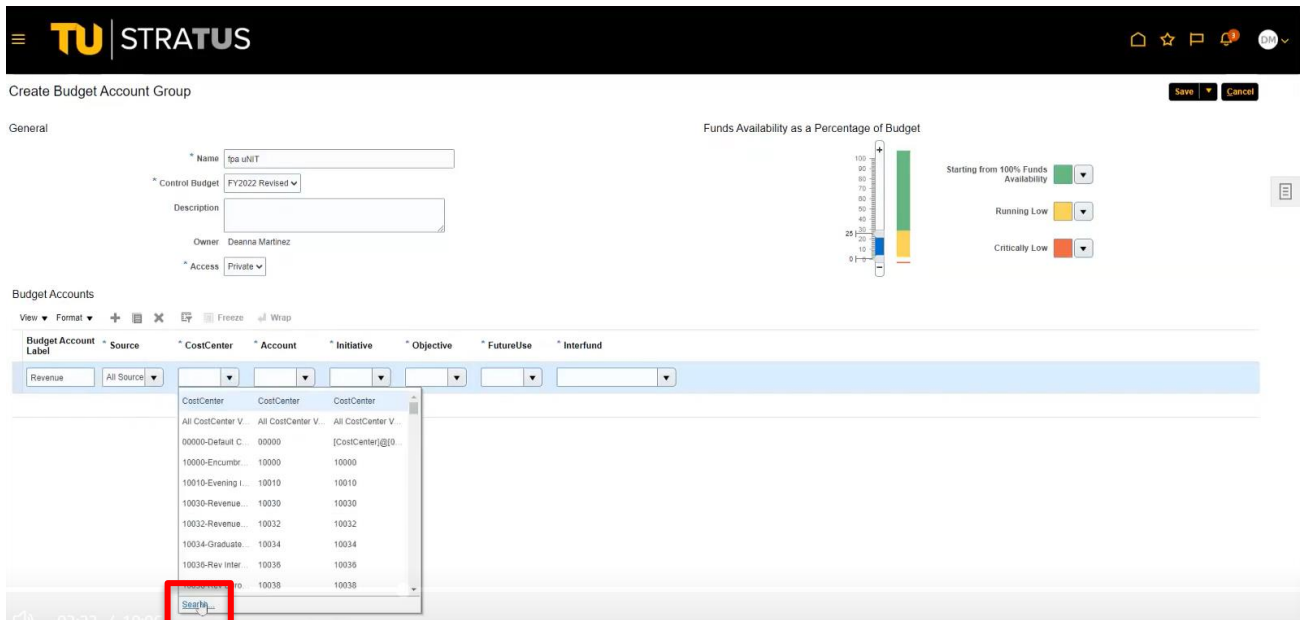
Budget Account Label	Source	CostCenter	Account	Initiative	Objective	FutureUse	Interfund
Revenue	All Source						

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

Budget Transfers & Review – Create Budget Monitor



- 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**.



Budget Transfers & Review – Create Budget Monitor

- 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.

The screenshot shows the 'Create Budget Account Group' interface. In the 'Budget Accounts' section, the 'Account' dropdown is highlighted with a red box and set to 'REVALL'. Other dropdowns for 'Initiative', 'Objective', 'Future Use', and 'Interfund' are also visible.

- 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.

The screenshot shows the 'Create Budget Account Group' interface. The 'Initiative', 'Objective', 'Future Use', and 'Interfund' dropdown menus are highlighted with a red box and set to 'All Initiative', 'All Objecti', 'All Future', and 'All Interfund Values' respectively.

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

The screenshot shows the 'Create Budget Account Group' interface. The 'Save and Close' button is highlighted with a red box. Below the form, a table displays the budget account rows:

Budget Account Label	Source	CostCenter	Account	Initiative	Objective	FutureUse	Interfund
Operating	All Source	UFFA1	XP6000	All Initiative	All Objecti	All Future	All Interfund Values
Salaries	All Source Values	UFFA1	XP5000	All Initiative Values	All Objective Values	All FutureUse Value	All Interfund Values
Revenue	All Source Values	UFFA1	REVALL	All Initiative Values	All Objective Values	All FutureUse Value	All Interfund Values

Budget Transfers & Review – Create Budget Monitor

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

The screenshot shows the TU STRATUS Budgetary Control Dashboard. The main section is the Budget Monitor, which displays a table of budget data. A dropdown menu is open for the 'Period to date' field, showing options: 'Period to date', 'Quarter to date', 'Year to date', and 'Budget to date'. The table below shows columns for Source, CostCenter, Account, Initiative, Objective, Interfund, Budget (USD), Consumption (USD), and Funds Available. The Funds Available column includes Amount (USD) and Budget (%).

Source	CostCenter	CostCenter Description	Account	Initiative	Objective	Interfund	Budget (USD)				Consumption (USD)			Funds Available	
							Total	Commitments	Obligations	Expenditures	Total	Amount (USD)	Budget (%)		
All Source Values	UFPFA1	UFPFA1-Financia	XP5000	All Initiative Values	All Objective Val	All Interfund Val...	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
All Source Values	UFPFA1	UFPFA1-Financia	REVALL	All Initiative Values	All Objective Val	All Interfund Val...	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
All Source Values	UFPFA1	UFPFA1-Financia	XP6000	All Initiative Values	All Objective Val	All Interfund Val...	0.00	0.00	10.00	410.35	420.35	-420.35	0.00		

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.

This screenshot is similar to the previous one, but with a red box highlighting the 'Period to date' dropdown menu. The menu options are 'Period to date', 'Quarter to date', 'Year to date', and 'Budget to date'. The table below shows the same data as the previous screenshot.

Source	CostCenter	CostCenter Description	Account	Initiative	Objective	Interfund	Budget (USD)				Consumption (USD)			Funds Available	
							Total	Commitments	Obligations	Expenditures	Total	Amount (USD)	Budget (%)		
All Source Values	UFPFA1	UFPFA1-Financia	XP5000	All Initiative Values	All Objective Val	All Interfund Val...	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
All Source Values	UFPFA1	UFPFA1-Financia	REVALL	All Initiative Values	All Objective Val	All Interfund Val...	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
All Source Values	UFPFA1	UFPFA1-Financia	XP6000	All Initiative Values	All Objective Val	All Interfund Val...	0.00	0.00	10.00	410.35	420.35	-420.35	0.00		

Budget Transfers & Review – Create Budget Monitor

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

The screenshot shows the 'Budget Monitor' interface in the TU STRATUS system. The top navigation bar includes the TU STRATUS logo and utility icons. Below the dashboard title, there are filters for 'Budget Period' (Jul-22) and 'Balance' (Period to date). A 'View' dropdown menu is open, showing options like 'Budget Account Group', 'Columns', 'Detach', 'Sort', 'Reorder Columns...', and 'Query By Example'. The main table displays budget data with columns for Objective, FutureUse, Interfund, Budget (USD), Consumption (USD), Funds Available (Amount (USD) and Budget (%)).

Objective	FutureUse	Interfund	Budget (USD)		Funds Available	
			Total	Total	Amount (USD)	Budget (%)
Values All Objective Val...	All FutureUse V...	All Interfund Val...	155,535,547.44	5,291,139.46	150,244,407.98	96.60
Values All Objective Val...	All FutureUse V...	All Interfund Val...	142,120,705.00	30,606.19	142,090,098.81	99.98

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.)