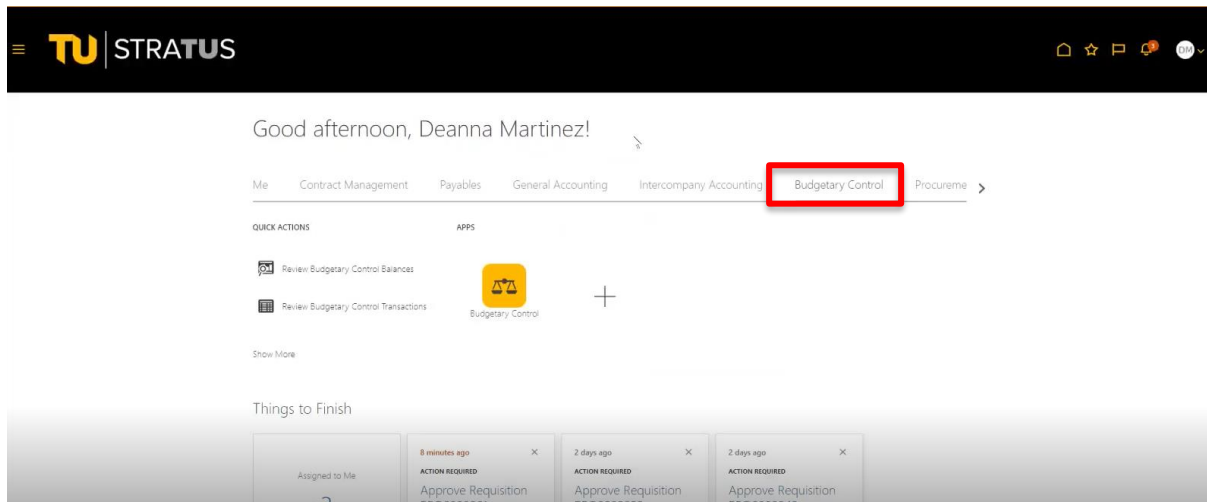


# Budget Transfers & Review – Create Budget Monitor

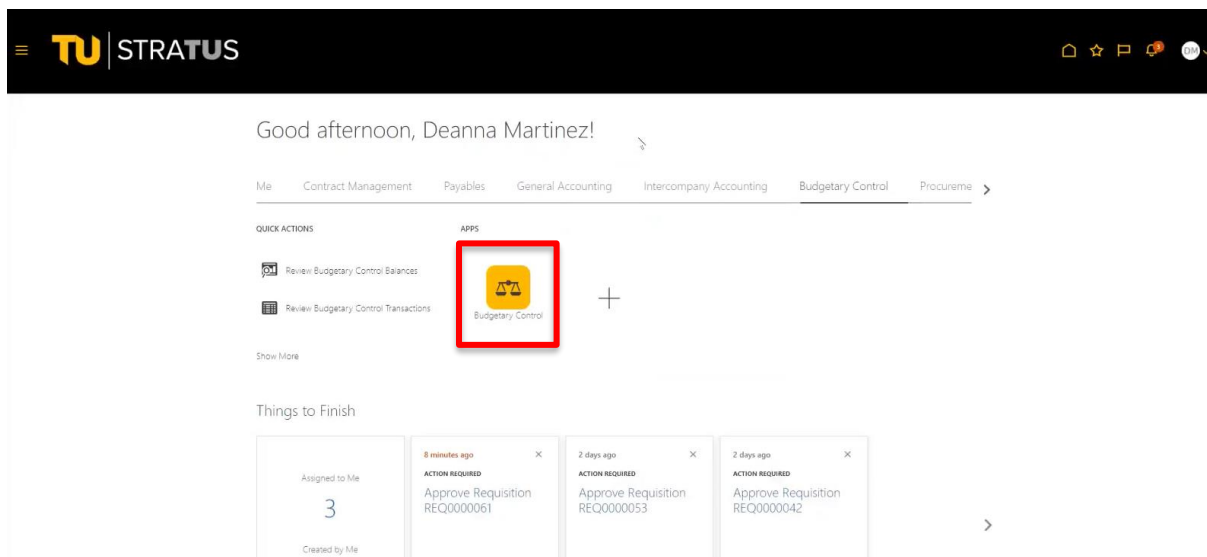
For employees creating a budget monitor.

- 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.

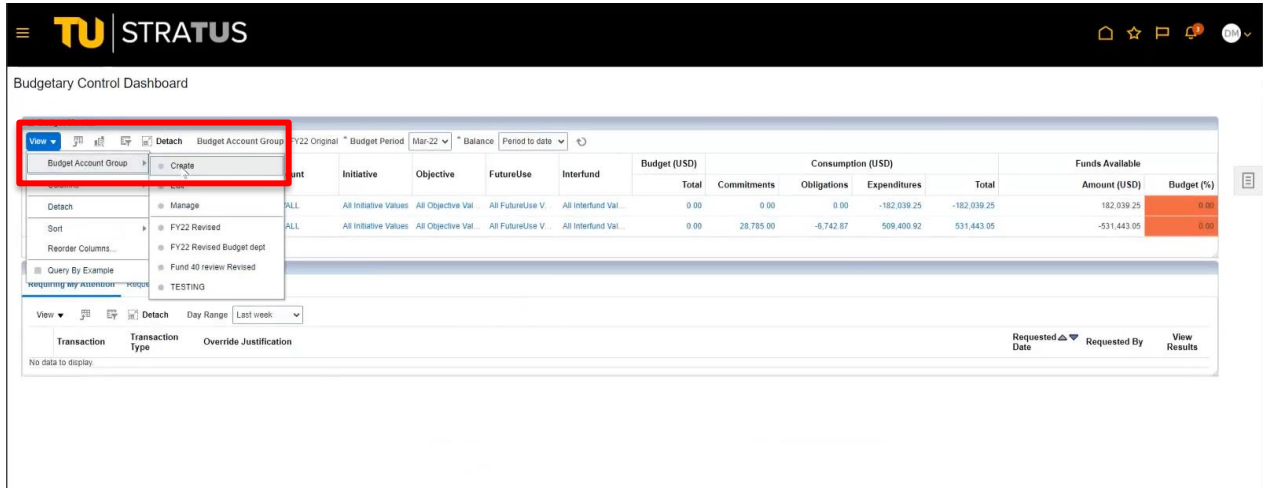


2. Under Budgetary Control, select the **Budgetary Control** tile.

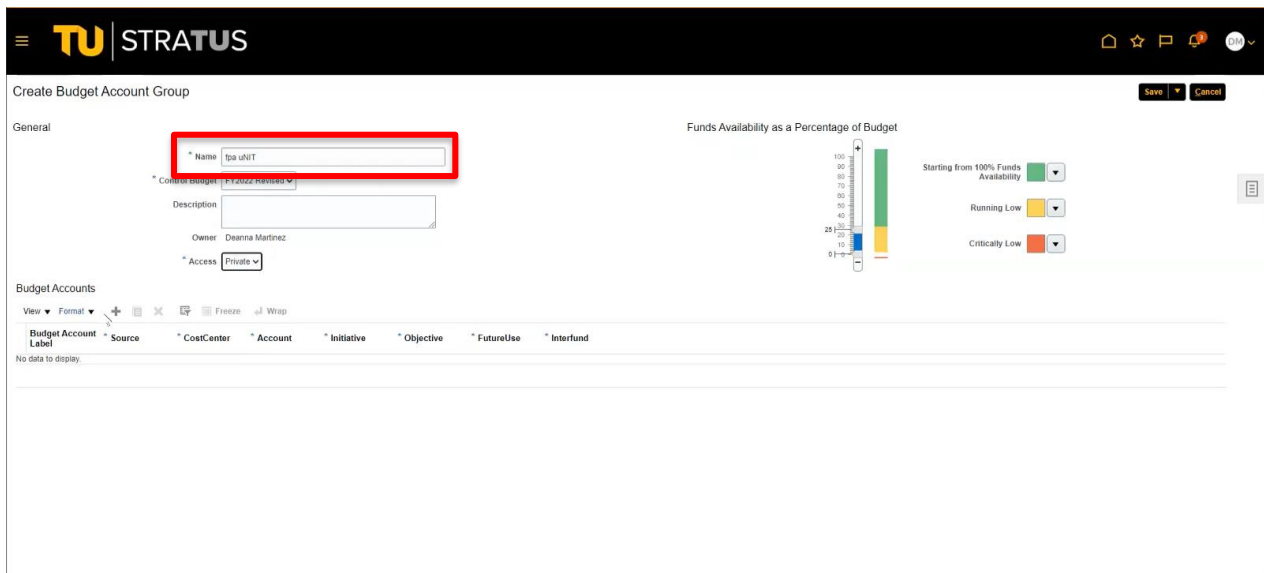


## Budget Transfers & Review – Create Budget Monitor

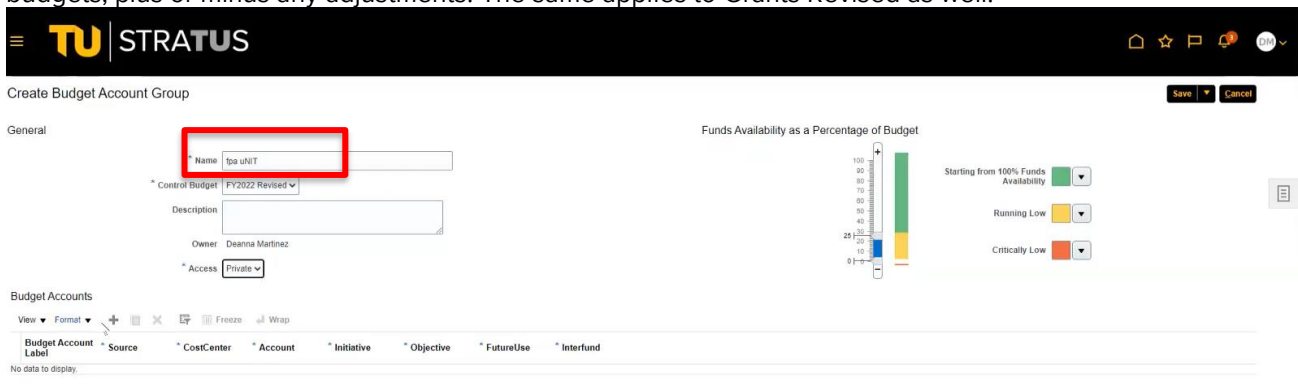
- To create a budget monitor, select **View**, **Budget Account Group**, and **Create**.



- 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.



- 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.



- 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: [Green]  
Running Low: [Yellow]  
Critically Low: [Red]

Budget Accounts

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

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.

Budget Accounts

View Format + X Freeze Wrap

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

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.)

Budget Accounts

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

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.

## 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**.

Description	Member Name	Member Unique Name
CostCenter	CostCenter	CostCenter
All CostCenter V...	All CostCenter V...	All CostCenter V...
00000-Default C...	00000	{CostCenter}@0...
10000-Encumbr...	10000	10000
10010-Evening I...	10010	10010
10030-Revenue...	10030	10030
10032-Revenue...	10032	10032
10034-Graduate...	10034	10034
10036-Rev Inter...	10036	10036
10038-Rev Enro...	10038	10038

## 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. The table below shows the budget account details:

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.

Budgetary Control Dashboard

Budget Monitor

View Print Detach Budget Account Group: tpa uNT Budget Period: Mar-22 Balance: Period to date

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	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	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	0.00	

Overrides

Requiring My Attention Requested by Me

View Print Detach Day Range: Last week

Transaction	Transaction Type	Override Justification	Requested Date	Requested By	View Results
No data to display.					

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.

Budgetary Control Dashboard

Budget Monitor

View Print Detach Budget Account Group: tpa uNT Budget Period: Mar-22 Balance: Period to date

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	0.00	

Overrides

Requiring My Attention Requested by Me

View Print Detach Day Range: Last week

Transaction	Transaction Type	Override Justification	Requested Date	Requested By	View Results
No data to display.					

## 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 several utility icons. Below the navigation bar is the 'Budgetary Control Dashboard' header. The main content area features a 'Budget Monitor' window with a sidebar menu on the left and a data table on the right.

The sidebar menu includes options such as 'Budget Account Group', 'Columns', 'Detach', 'Sort', 'Reorder Columns...', 'Query By Example', and 'Requiring My Attention'. The data table displays budget and consumption information for various categories.

Objective	FutureUse	Interfund	Budget (USD)		Consumption (USD)		Funds Available	
			Total	Total	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.)