

How do I access and set up a dashboard of my department budget(s)?

Select the *Department Budget Dashboard* option from the Main Menu. Add to your Favorite menu items.

Select the budget period that you are monitoring.

Click on the Create/Modify groups of projects/grants link.

Budget Period

Departments

[Create/Modify groups of departments](#) Group

Fund	Dept	Description	Budget	Expense	Encumbrance	Pre-Encumbrance	Balance
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Name the Group.

Enter department numbers one by one, using the circled plus sign to add additional rows as needed.

Save and return.

Add or remove groups of p/g to display on your dashboard

Group

Department	Description		
1 60000	Budget & Planning	+	-
2 60100	Controller's Office	+	-
3 60101	Comptroller's-Trustee Meetings	+	-

Make sure the desired group is displaying from the drop down menu.

Budget Period

Departments

[Create/Modify groups of departments](#) Group

Fund	Dept	Description	Budget	Expense	Encumbrance	Pre-Encumbrance	Balance
100	60000	Budget & Planning	9,600.00	1,142.28	4,000.00	0.00	4,457.72
100	60100	Controller's Office	42,000.00	30,765.20	3,774.15	0.00	7,460.64
100	60101	Comptroller's-Trustee Meetings	2,100.00	0.00	0.00	0.00	2,100.00

The dashboard will show the operating expense budget totals.

All numbers will drill to underlying transactions using the magnifying glass icon, with the most recent transaction at the top.

If you wish to have more than one group of grants or projects to track via the dashboard, click on the plus sign to the right of the Group name, as shown below and repeat as above.

Add or remove groups of p/g to display on your dashboard Find | View All | First | 1 of 1 | Last

Group + -

	Department		Description		
1	<input type="text" value="60000"/>		Budget & Planning	+	-
2	<input type="text" value="60100"/>		Controller's Office	+	-
3	<input type="text" value="60101"/>		Comptroller's-Trustee Meetings	+	-