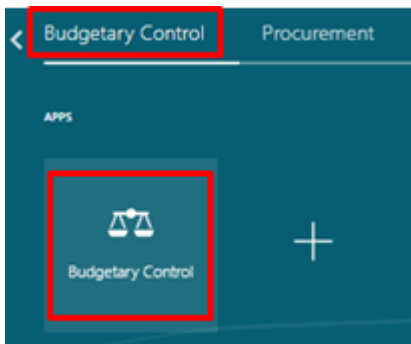


In this topic you will learn how to set up a budget account for Blue Bag postage. Schools with Blue Bag accounts can do this to monitor Blue Bag balances and activity for their school. There is also a Blue Bag Report, located under the School Reports menu, that users can run to see Blue Bag activity.

*Image quality in this guide may vary across devices. If images are not clear, increase your viewing size.*

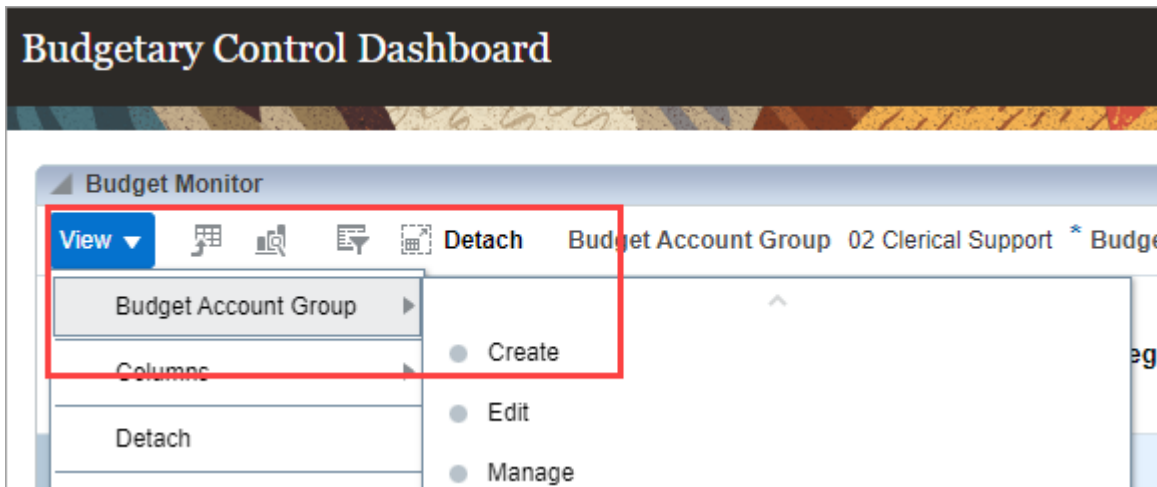
## Directions

1. Scroll to the **Budgetary Control** menu and select the **Budgetary Control** icon.



2. In the **Budget Monitor** section of the budgetary control dashboard, you will create your budget account group. Pull down the **View** menu and select **Budget Account Group**, then **Create**.

**Note:** *This is a one-time activity.*



3. Enter the budget group name, e.g., 04230-DS-BlueBag.

**Note:** *Use organization number-Your initials-group-description (e.g. 04230-DS-BlueBag).*

\* Name



# Blue Bag - Create and Monitor Budget Group

4. Select **Control Budget** 02 MCPS Monthly Detail Budget.

\* Name 04230-DS-Bluebag

\* Control Budget

Description

- 01 MCPS Original Detail Budget
- 01 MCPS Original FTE Budget
- 02 MCPS Monthly Detail Budget**

5. Check “Set as default in my Budget Monitor.”  
Check “Display on my infolet” if you want to view this in the analytics section of your homepage.

☒ Set as default in my Budget Monitor

☒ Display on my infolet

6. Select the + icon to add the account combination with your school account string for instructional materials.  
For example, for Rockville HS (04230)

01.04230.00000.230.04.503003.000000.0000.00

Create Budget Account Group

General

\* Name 04230-DS-Bluebag

\* Control Budget 02 MCPS Monthly Detail Budget

Description

☒ Set as default in my Budget Monitor

☒ Display on my infolet

Budget Accounts

View Format + X Freeze Wrap

Budget Account Label	* Fund	* Organization	* MCPSPFunction	* Location	* MCPSCategory	* Natural Account	* Project	* Activity	* Interfund
Inst Mat	01	04230	00000	230	04	503003	000000	0000	00



## Blue Bag - Create and Monitor Budget Group

7. Select the **+** icon again to add the next line with the new account combination for Blue Bag, using your school location in the location segment (e.g., 230 for Rockville HS)

- 01.35102.00000.230.10.503068.000000.0000.00

Create Budget Account Group

General

Funds Availability as a Percentage

\* Name 04230-DS-Bluebag

\* Control Budget 02 MCPS Monthly Detail Budget

Description

☒ Set as default in my Budget Monitor

☒ Display on my infolet

Budget Accounts

View Format **+** Add Delete Copy Paste Freeze Wrap

Budget Account Label	Fund	Organization	MCPSCategory	Location	MCPSCategory	Natural Account	Project	Activity	Interfund
Blue Bag	01	04230	00000	230	10	503068	000000	0000	00
Inst Mat	01	04230	00000	230	04	503003	000000	0000	00

8. Click **Save and Close** button to return to the Budgetary Control Dashboard.

Save

Cancel

**Save and Close**

Save and Create Another

9. To review in the Budget Monitor, change the **Budget Period** if needed. In the **Balance** drop-down, select either Year to Date or Period to Date.

Budgetary Control Dashboard

Budget Monitor

View Format Add Delete Copy Paste Freeze Wrap

Budget Account Group 04230-DS-Bluebag

Budget Period Mar-20 Balance Year to date



## Blue Bag - Create and Monitor Budget Group

10. Click the Refresh icon to update the information.



11. Drill down for more information on the expenditures by clicking on the dollar amount in the **Consumption** column on the Organization 35102 line.

Organization	MCPSFunction	Location	MCPSCategory	Natural Account	Period	Budget (USD)	Consumption (USD)	Funds Available	
						Total	Total	Amount (USD)	Budget
35102	00000	230	10	503068	0	0.00	-27.67	27.67	



### Managing Columns

The view on this screen is split between two sides: The Chart of Accounts segments on the left, and the Budget expenditure columns on the right. Manage your view in two ways:





1. **Reduce the number of visible columns.** Click on the **View** pull-down menu and select **Columns**. Deselect each column you wish to hide.
2. **Drag column margins to reduce width.** Hover over the line to the right of the column you wish to reduce. When your cursor becomes a left/right arrow icon, click and drag to the left to reduce column width.

Total Budget		Commitments	
0.00		0.00	
0.00		0.00	

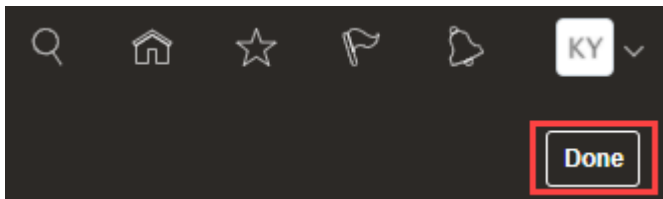
12. For individual expenditures, click on the **Expenditures** dollar amount for the period you want to view.

Natural Account	Budget Period	Total Budget	Commitments	Obligations	Other Consumption	Expenditures
503068	Nov-21	0.00	0.00	0.00	0.00	-8.65
503068	Jan-21	0.00	0.00	0.00	0.00	-11.01
503068	Feb-21	0.00	0.00	0.00	0.00	-8.01
		0.00	0.00	0.00	0.00	-27.67

13. Details on the postage transactions include the date and amount.

Budget Transactions					
View ▼	Format ▼			Wrap	Transaction Number <input type="text"/>
	m/d/yyyy 	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Budget Date	Transaction	Transaction Type	Reserved Transaction Amount	Activity	
11/9/20	35102-Blue Bag Journal Transacti...	General ledger journal	-4.50 USD	Reservation	
11/30/20	35102-Blue Bag Journal Transacti...	General ledger journal	-0.50 USD	Reservation	
11/30/20	35102-Blue Bag Journal Transacti...	General ledger journal	-3.00 USD	Reservation	
11/30/20	35102-Blue Bag Journal Transacti...	General ledger journal	-0.65 USD	Reservation	

14. Click **Done** when finished to exit; then click **Done** again to return to the Budgetary Control Dashboard.



15. Click on the **Home** icon to return to the home page.



**Note:** Your screen may differ from screenshots in these instructions, due to variations in user roles and system upgrades.