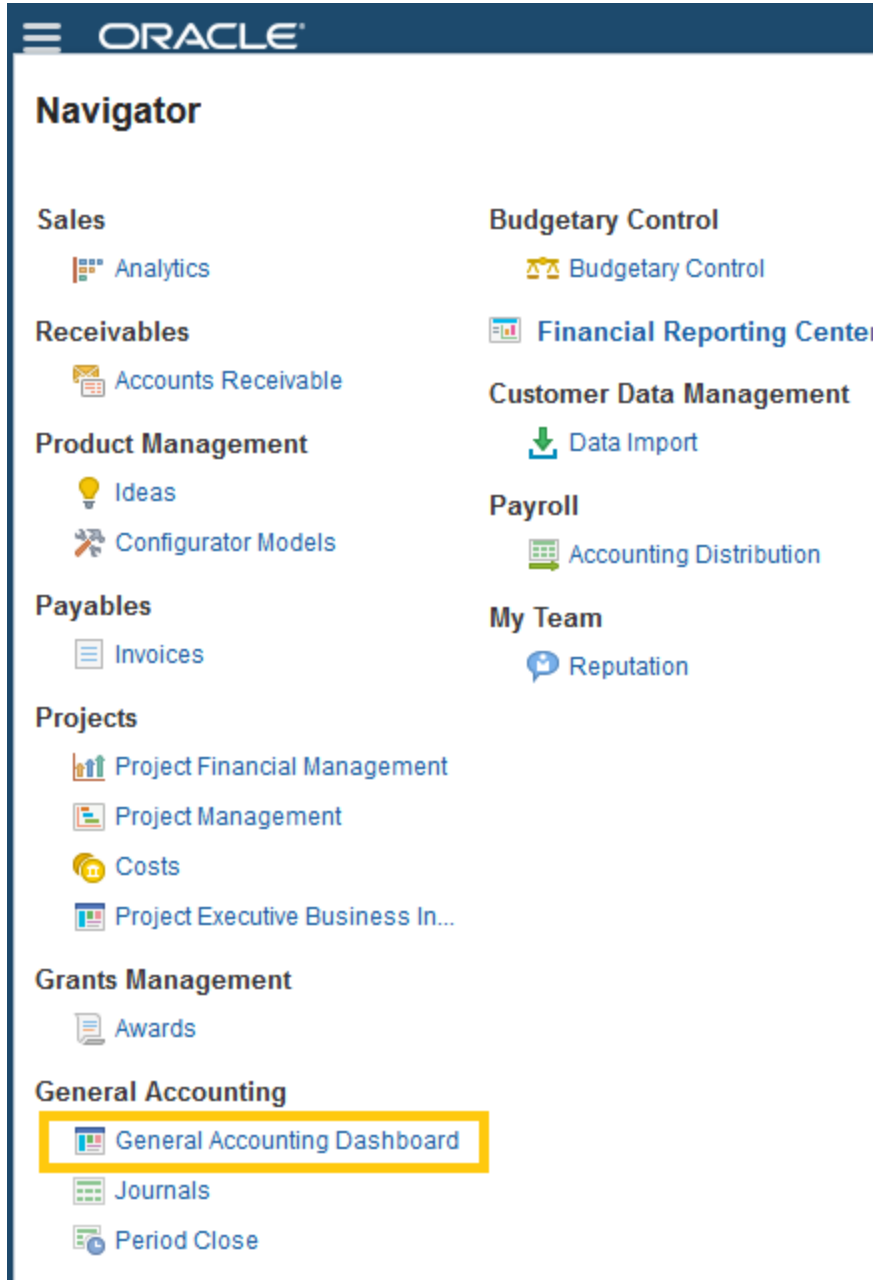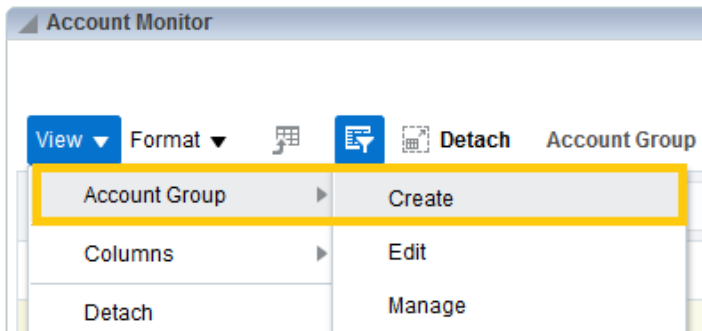## Configuring an Account Group in the Account Monitor

1. Navigate to the **General Accounting Dashboard** page using the Navigator.

2. Select **View > Account Group > Create**.

Other options include:

   a. **Edit** to change an existing account group.
   b. **Manage** to create, edit, or delete account groups. In the Manage Account Group you can enable sharing of account groups with other users.

3. Enter the **account group name** and **description**, and for **Display In** select Account Monitor

4. Select the **Set as default** check box if the account group is used as the default account in the Account Monitor. The setting gives the user a unique default view of account groups in various display targets. Note: If you are creating an account group for the first time, this will be automatically selected and greyed out.

5. Select a **Time Option** and **Comparison Option**

   For example, if you would like to monitor a month end balance, choose the Time Option of "Accounting period" and if you would like a comparison amount from last year for that same month choose a Comparison Option of "Prior year YTD"

These are the options and comparisons available

| Time Option	Comparison Option
Accounting Period	○ Budget PTD
	○ Budget QTD
	○ Budget YTD
	○ Prior period PTD
	○ Prior year PTD
	○ Prior year QTD
	○ Prior year YTD
Quarter	○ Budget QTD
	○ Budget YTD
	○ Prior quarter QTD
	○ Prior year QTD
	○ Prior year YTD
Year	○ Budget YTD
	○ Prior year YTD

6. Set **Access**
   a. Private: For your use only
   b. Public: For use by all users who have access
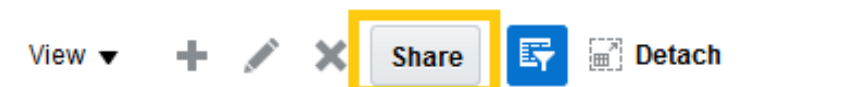   c. Shared: For use by users you specify and have access
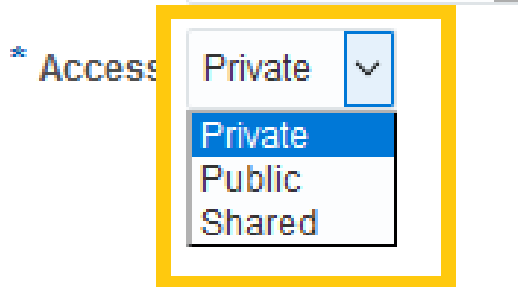
Note: To set shared access, navigate to the **Manage Account Group** page
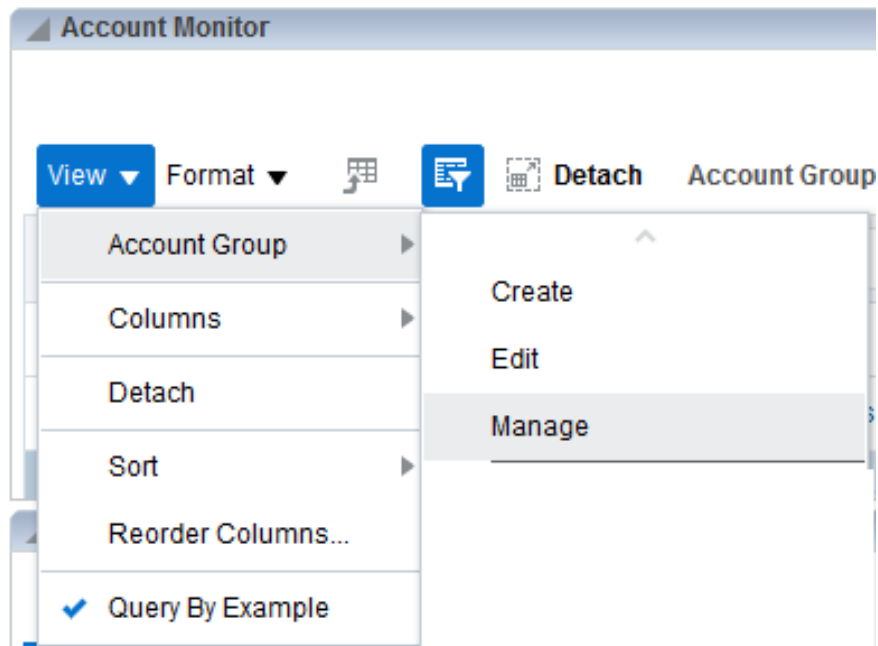
7. Enter the chart of account string segment values you want to monitor in the **Accounts** section.
   a. Click on the **plus sign** to add an entry row. You can add multiple chart of accounts string rows as necessary.

   Accounts

   View ▾   Format ▾   **+**   ▤   ✕   ▥ Freeze   ↵ Wrap

Name	* L~~ Add Row ~~	* **Unit**

   No data to display.

   b. Give each account group a short **Name** that is easily recognizable. Names can be edited by navigating to the **Actions** menu > **Edit** on the **Account Monitor** region on the **General Accounting Dashboard**.

   Accounts

   View ▾   Format ▾   **+**   ▤   ✕   ▥ Freeze   ↵ Wrap

Name	* **Ledger**	* **Unit**
NAME	Rutgers Ledger ▾	All Unit Values ▾

   c. Enter either parent or child values for each segment of the account. Make sure to always select Rutgers Ledger for the Ledger.
      i. Child Value Example for Unit

      Accounts

      View ▾   Format ▾   **+**   ▤   ✕   ▥ Freeze   ↵ Wrap

Name	* **Ledger**	* **Unit**
NAME	Rutgers Ledger ▾	900 ▾

      ii. Parent Value Example for Unit

      Accounts

      View ▾   Format ▾   **+**   ▤   ✕   ▥ Freeze   ↵ Wrap

Name	* **Ledger**	* **Unit**
NAME	Rutgers Ledger ▾	9TT ▾

d. Select when to display the account in the **Change** field.
     i. Always Display
    ii. Decrease by Less than Amount
   iii. Decrease by Less than Percentage
    iv. Decrease by More than Amount
     v. Increase by More than Amount
    vi. Increase by Less than Amount
   vii. Increase by Less than Percentage
  viii. Increase by More than Percentage
    ix. Decrease by More than Percentage
     x. Not Equal
    xi. Equal

e. Enter **Threshold** which is the criteria that is being measured against. **Threshold** is used in conjunction with the **Change** selection. Note: If Always Display is chosen, no Threshold selection is available.

8. Click **Save and Close** or **Save and Create Another**.

9. After saving your Account Group, your results should appear in the Account Monitor section. Note that the Period is a parameter and can be changed to view results for different periods.