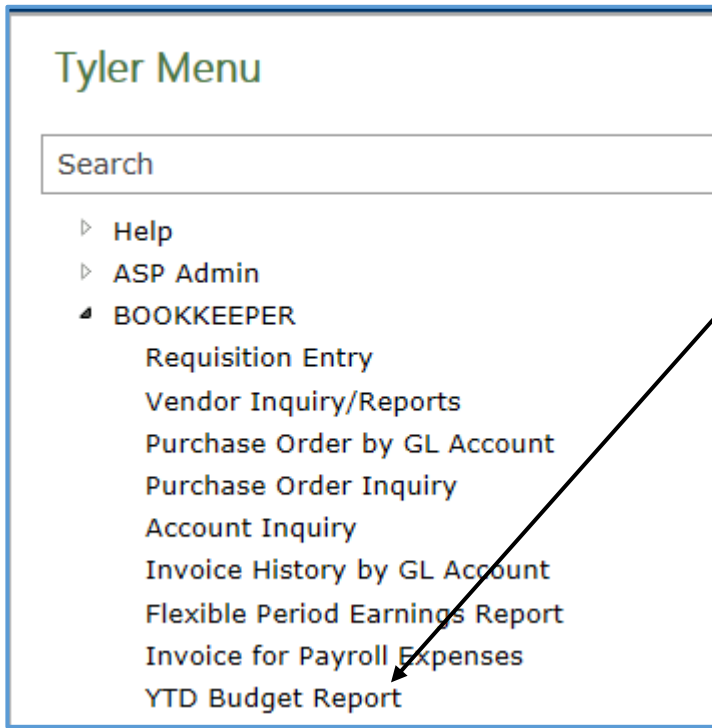
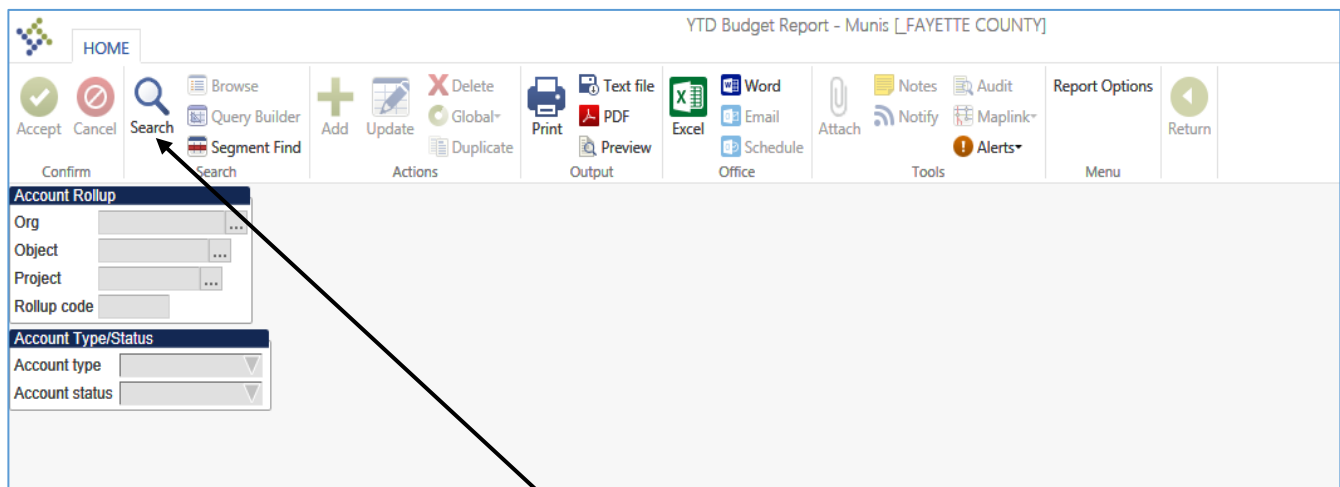



YTD BUDGET REPORT

Open your Munis menu and click on the Bookkeeper category. Select **YTD Budget Report**.



Report Criteria:



Use the  magnifying glass icon to perform a **Search**. (This icon was previously called Find.)

YTD BUDGET REPORT

HOME

Accept Cancel Search Browse Query Builder Segment Find

Confirm Search

Account Rollup

Org 105* ...

Object ...

Project 7100 ...

Rollup code

Account Type/Status

Account type

Account status

40 Record(s) found.

Enter your criteria in the fields to select by org, object, and/or project. **1**

Click **Accept**



Or search by segment using the **Segment Find** function on the ribbon. **2**

HOME

Accept Cancel Search Browse Query Builder

Confirm Search

Find by Segments

Fund

Unit

Function

Program

Inst Level

Character Code

Org

Object

Project

Account type

Account status

Rollup Code

Enter your criteria and click **Accept**.

Report Options:

Access the **Report Options** on the ribbon at the right side of the screen.

Accept Cancel Search Browse Query Builder Segment Find

Confirm Search

Actions: Add Update Global+ Duplicate

Output: Print Text file PDF Preview

Office: Excel Word Email Schedule

Tools: Attach Notes Notify Audit Maplink Alerts

Menu: Report Options Return

Account Rollup

Org 105* ...

Object ...

Project 7100 ...

Rollup code

Account Type/Status

Account type

Account status

YTD BUDGET REPORT

Enter the year/period. Use the current fiscal year and period 99. This will give you all periods. Check print options if you want to see the report options you selected.

Report Sequence

Execute this report: Now

Sequence	Field #	Total	Page Break
Sequence 1	12 - Project	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sequence 2	9 - Org	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sequence 3		<input type="checkbox"/>	<input type="checkbox"/>
Sequence 4		<input type="checkbox"/>	<input type="checkbox"/>

Report title: YEAR-TO-DATE BUDGET REPORT

Print Options | Additional Options

Report Options

Include only accounts that used: 0 % or greater of budget

Order accounts by: Org, Object, Project

Totals only:

Account description: Full

Print full GL account:

Roll projects to object:

Print report options:

Year/period: Within year/period 2017 / 99

Carry forward: Current year only

Print MTD version:

Format type: Standard format

Double space:

Suppress zero bal accts:

On the Additional Options tab **Select** life to date view. Check include requisition amounts.

Print Options | **Additional Options**

Additional Options

Include requisition amounts	<input checked="" type="checkbox"/>	Include budget entries	<input checked="" type="checkbox"/>
Print Revenues-Version headings	<input type="checkbox"/>	Include encumb/liq entries	<input checked="" type="checkbox"/>
Print revenue as credit	<input checked="" type="checkbox"/>	Sort option	Purchase orders
Print revenue budgets as zero	<input type="checkbox"/>	Detail format option	Standard format
Include fund balance	<input type="checkbox"/>	Include additional JE comments	<input type="checkbox"/>
Print journal detail	<input type="checkbox"/>	Multiyear view	Life-to-date view
		Amounts/totals exceed 999 million dollars	<input type="checkbox"/>

From yr/per: 2017 0

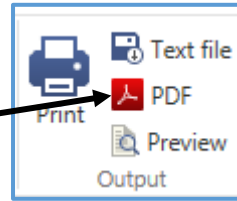
To yr/per: 2017 13

Click **Accept**. Click **Return, Yes** to Close, and go back to the YTD Budget Report home screen.



YTD BUDGET REPORT

Printing the report:

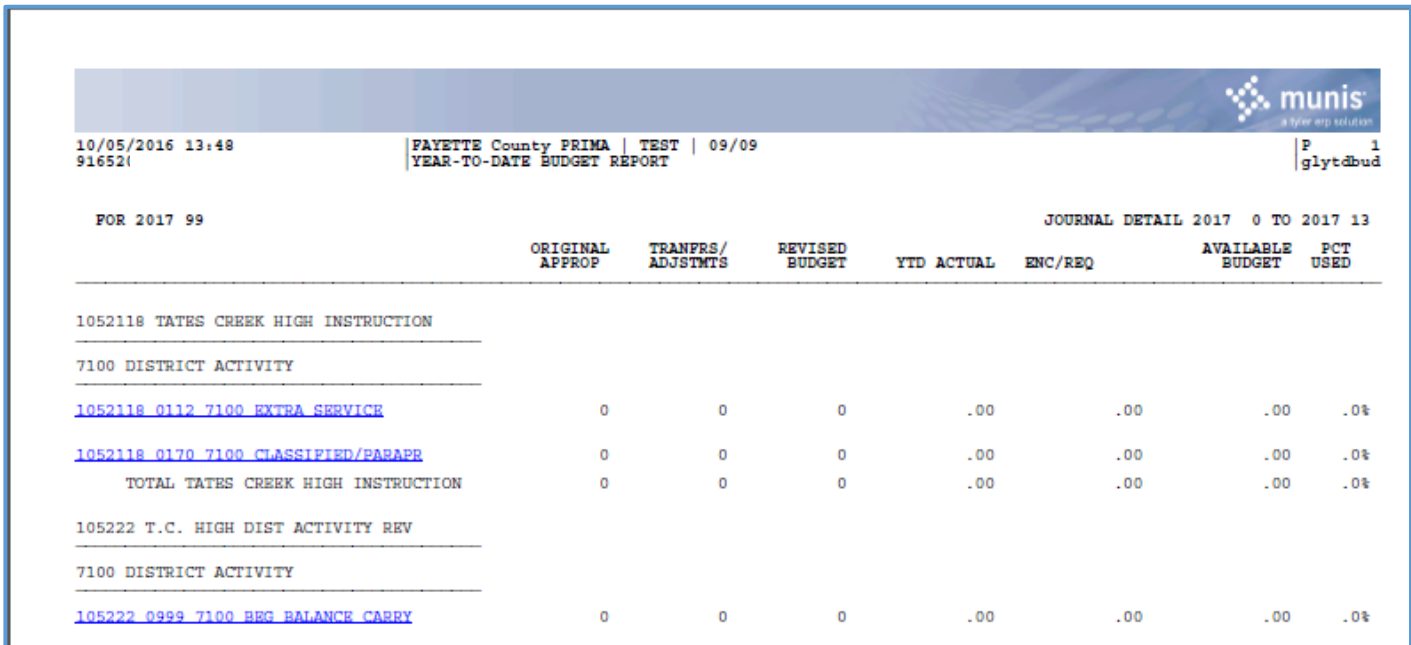


Select PDF from the Output section of the ribbon to print your report.

A pop-up ribbon as shown below will appear. Click **Save** then **Open**.



A PDF of the report information will open which you can print to your local printer →and/or save as you do other documents.



FOR 2017 99		ORIGINAL APPROP	TRANSFRS/ADJUSTMTS	REVISED BUDGET	YTD ACTUAL	ENC/REQ	AVAILABLE BUDGET	PCT USED
1052118 TATES CREEK HIGH INSTRUCTION								
7100 DISTRICT ACTIVITY								
1052118 0112 7100 EXTRA SERVICE		0	0	0	.00	.00	.00	.0%
1052118 0170 7100 CLASSIFIED/PARAPR		0	0	0	.00	.00	.00	.0%
TOTAL TATES CREEK HIGH INSTRUCTION		0	0	0	.00	.00	.00	.0%
105222 T.C. HIGH DIST ACTIVITY REV								
7100 DISTRICT ACTIVITY								
105222 0999 7100 BEG BALANCE CARRY		0	0	0	.00	.00	.00	.0%