

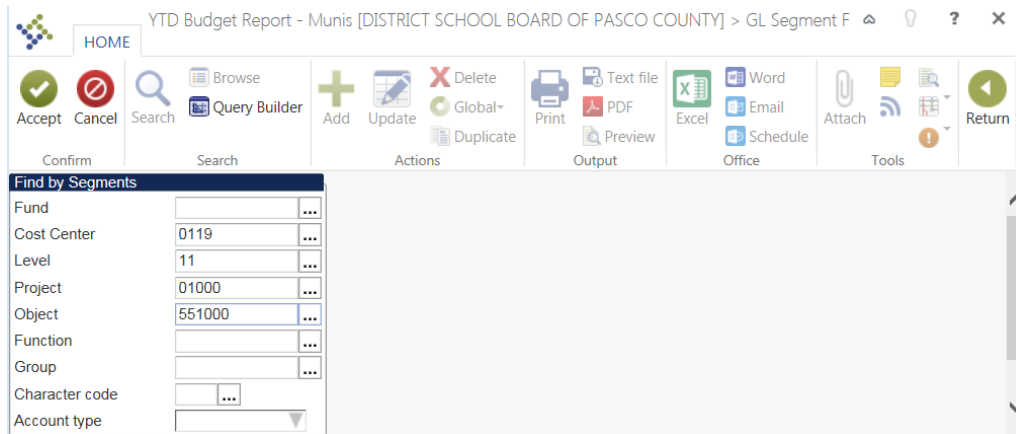
# MUNIS QSG

QUICK START GUIDE

## Activity: YTD Budget Report

**Menu Navigation:** Tyler Menu>Munis>Departmental Functions>YTD Budget Report

### Step 1 – Click Segment Find on the Munis ribbon



1. Enter the account segments that should be used in the selection process for the report. The report will only print those accounts that meet the selection criteria.
2. Click **Accept** to return to the main screen

Once the segment find has been used to select accounts for the report, the number of records that meet the selection criteria will be displayed at the bottom, left corner of the screen.

### Step 2 – Click Report Options in the ribbon

#### Complete the report sequence section

1. Click on the **drop down arrow**, to choose the sort sequence(s) desired for the report. The sample shown below is set up to sort by project only.
2. Check the **total box** to get a total for the sequence(s). In this sample there will be a total provided for all accounts by project.
3. Check the **page break box** to page break by the sequence, if needed
4. Fill in the **report title** desired

#### Complete the report options section.

1. Check the boxes shown for a basic report and type the **current fiscal year and period 99**. The report options last used will be saved and available the next time the report is run. By checking the **Print report options box**, the last page of the report will have the chosen criteria. A copy of the last page may be printed for future reference.
2. Click **Accept**
3. Click **Return** to go back to the main screen

**Report Sequence**

Execute this report: Now

	Field #	Total	Page Break
Sequence 1	11 - Object	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sequence 2		<input 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

**Report Options**

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

Order accounts by: Full Account

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: Totals (GAAP)

Print MTD version:

Format type: Standard format

Double space:

Suppress zero bal accts:

Click on the **PDF icon** to generate and view the report

Accept Cancel Search Browse Query Builder Add Update Delete Global Duplicate Print Text file PDF Excel Word Email Schedule Attach Notes Notify Maplink Alerts Return



Sometimes **less sort sequences** produce better results, depending on the reporting needs.



Check the MTD box to insert a column for the current month activity totals.



The Additional Options tab offers the ability to see detail of the activity reported. Check the **Print Journal Detail** box and enter the period(s) desired.



Whenever there is a **blue hyperlink** for the coding strip, drill down capabilities are available.



This report can be used for **negative balances** by adjusting the Report Option to include only accounts that used **101% or greater** of the budget.



Check the **Totals only** box to view a summary of the accounts excluding detail.