Under Departmental Functions choose <u>YTD Budget Report</u>. There are two ways to run this report.

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2. Method 1: Click on the magnifier.

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3. Enter the first three digits of your <u>org</u> with an asterisk and choose <u>Expense</u> as the Account Type. Then click the <u>Green check.</u>

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4. Click <u>Report Options</u>. Continue to step 7.

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5. <u>Method 2</u>: Using the Segment Find option you can look up a single account or by character. After clicking on YTD Budget Report click on <u>Segment Find</u>.

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6. Enter the <u>Division number</u> and select <u>Revenue or Expense</u> as the account type. You can also choose the <u>character code</u> from a list of characters such as <u>operating expenses</u>. Click the green check.



7. Choose execute this report <u>Now</u>. For sequences choose <u>Fund</u>, <u>Character</u>, <u>Org</u>, and <u>Object</u> with total checked.

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- 8. Include accounts that used <u>0%</u> or greater of budget. Make sure the year/period is <u>within</u> <u>year/period</u> and enter the year and period you want to run. In this example we are using <u>2014/12</u>. Click the Green check and exit.
- **9.** Now you are back to the main screen. You will see that it has found <u>36 records</u>. You can choose to download the records as a pdf, excel, or word by clicking on the appropriate icon, or simply display the report to the screen. For this example we will view it as a pdf.

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10. Click the PDF icon.

YTD Budget Report - Munis [TEST DATABASE Aug 7 2014]	×
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11.A PDF document will pop up. From here you can save the pdf.

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		92.8%	115,201.22	.00	63,111.88	1,483,697.78	1,598,899	1,355,172	TOTAL PERSONAL SERVICES				
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12. Your report is now complete.