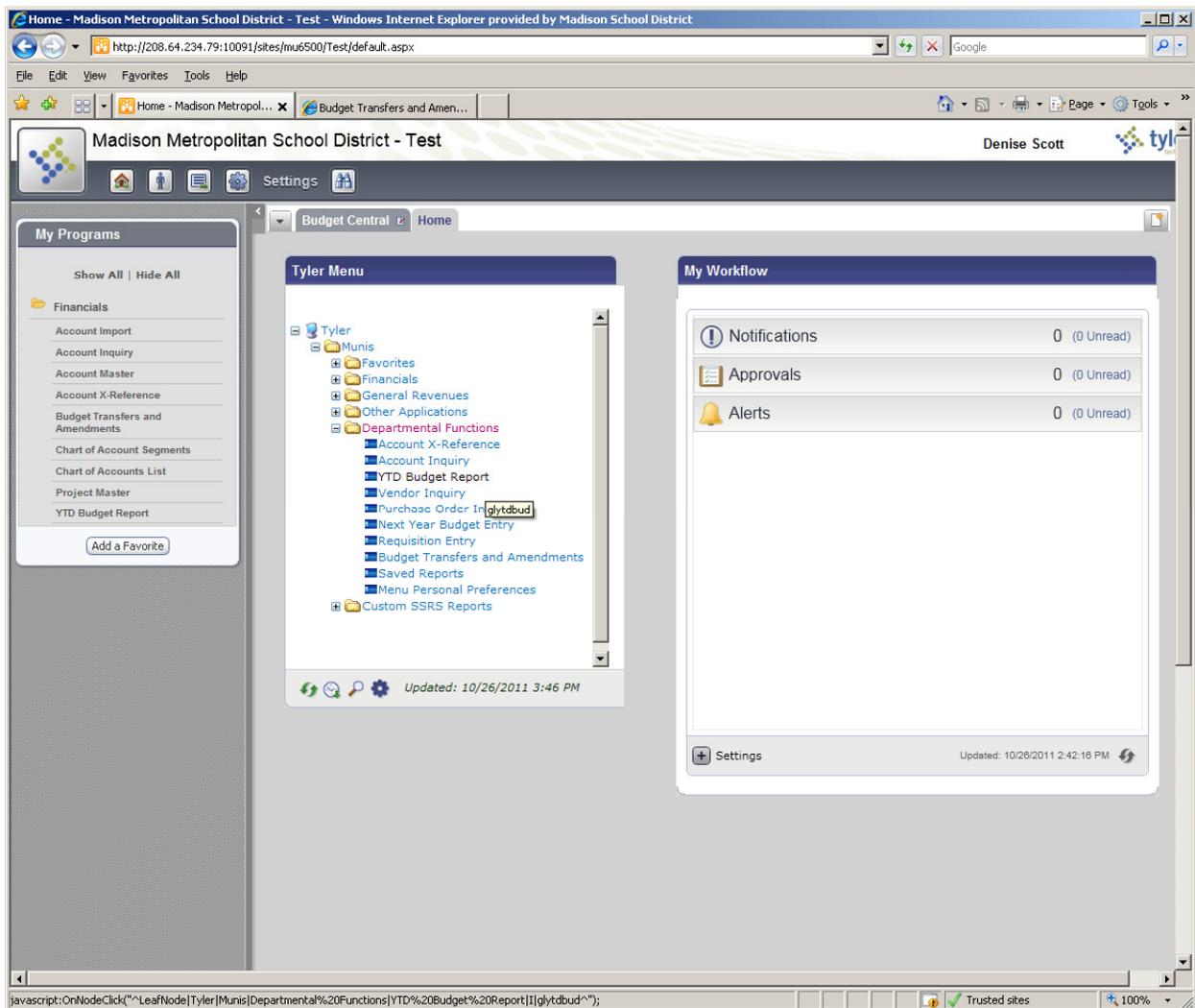




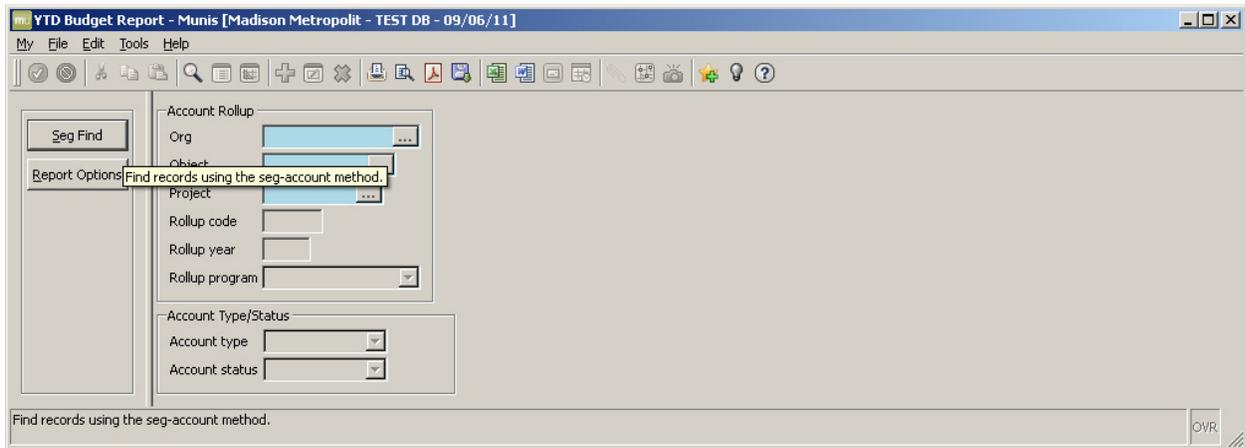
Setting up and using Queries

After going through the following steps, your query will be saved and unless you delete them, will be there each log in.

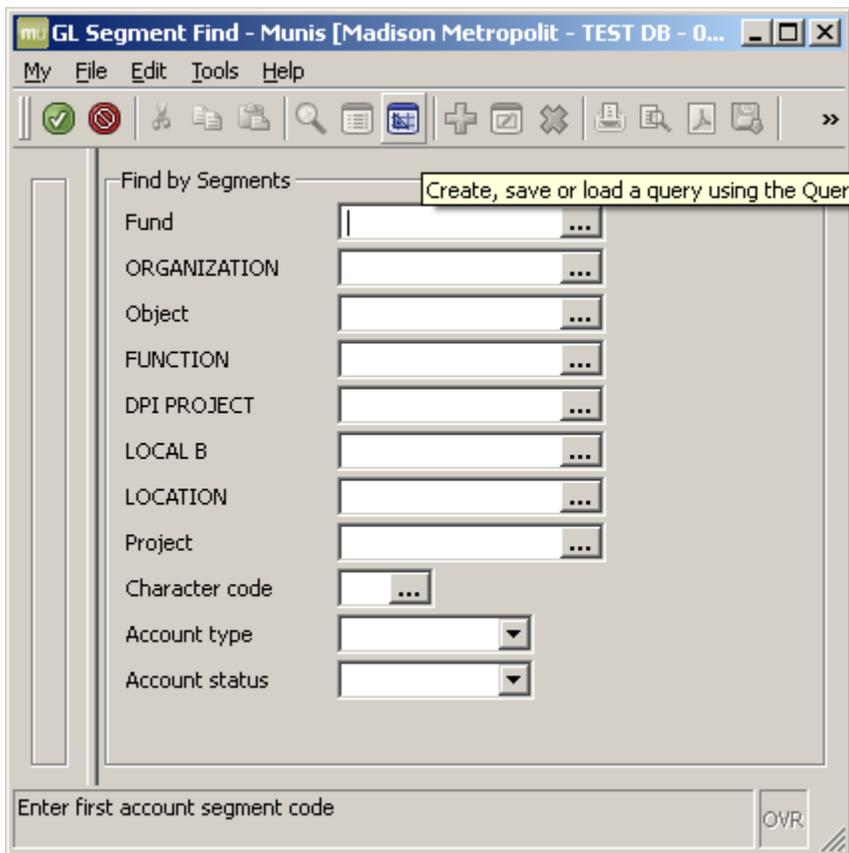
- Click “Departmental Functions”
- Click “YTD Budget report”



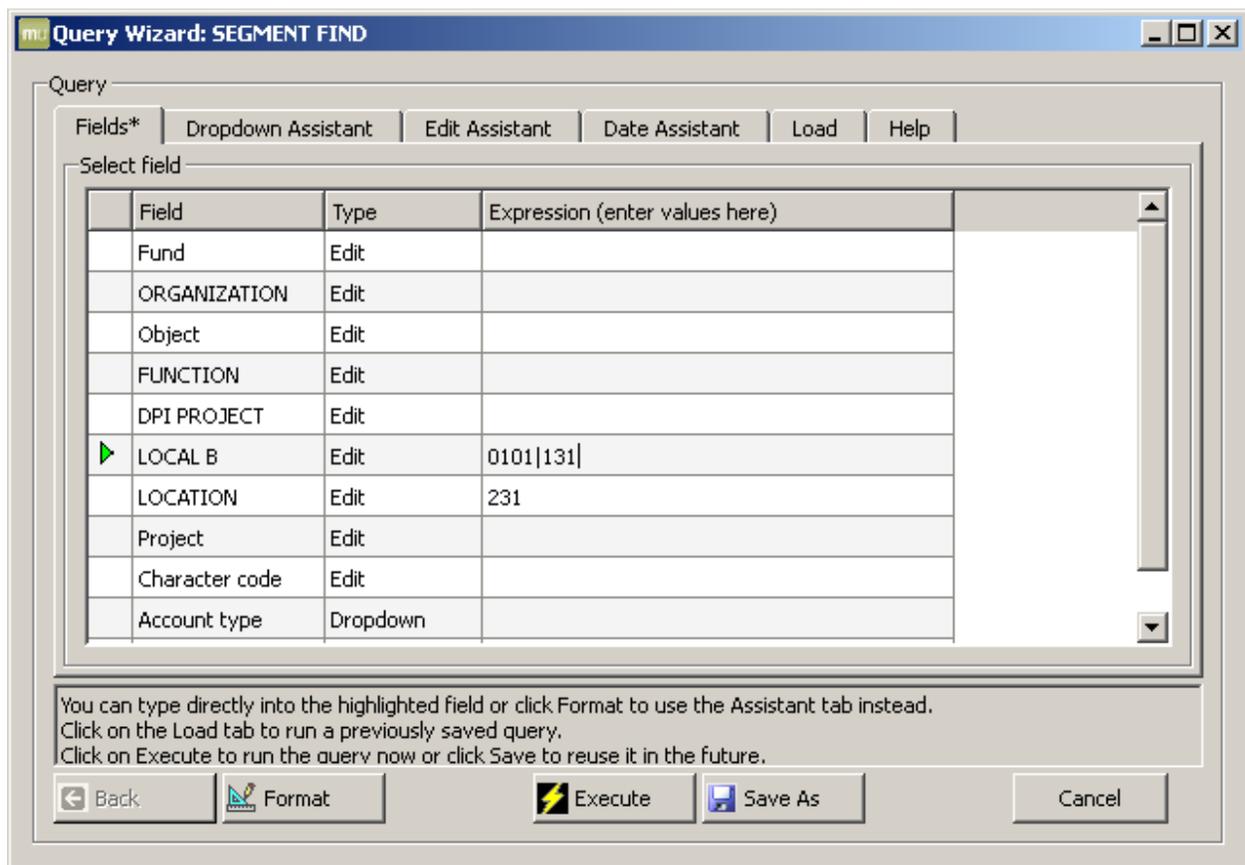
After clicking “YTD Budget Report” the set up menu will pop up:



- Click “Seg Find” for the following menu:



- Click the blue Excel/grid looking icon (“Create, save or load a query....”) for the query set up wizard:

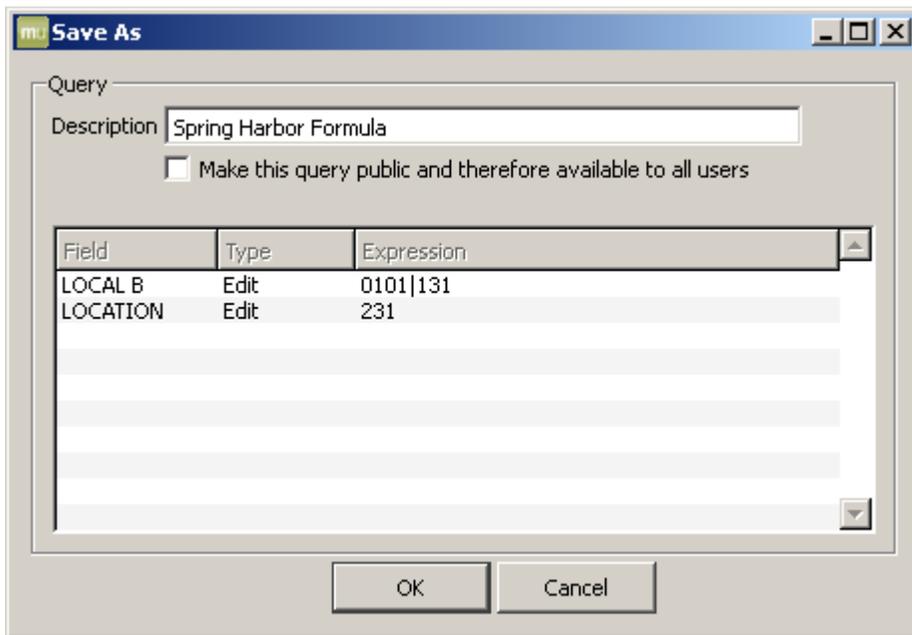


Stay on the “Fields” tab.

This is similar to the report set up menu. You can use single values or ranges. Above I selected Spring Harbor’s location with their Formula (101) and Formula carry over (131) Local B’s. The pipe symbol (|) means that only Local B’s 101 & 131 are included.

To see the report immediately, click “Execute.”

To save the query for now and future use click “Save As” (see below):



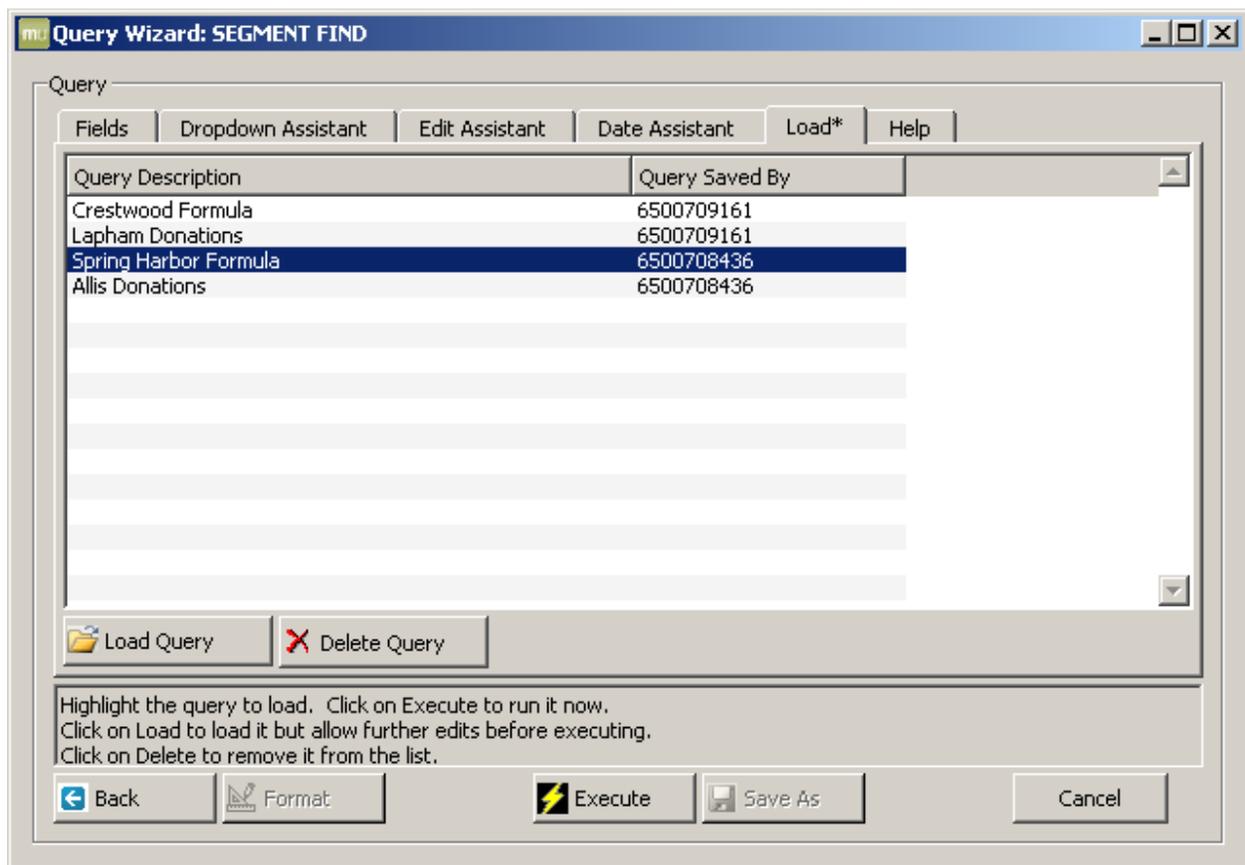
The image shows a 'Save As' dialog box for a query. The title bar reads 'mu Save As'. The main area is titled 'Query' and contains a 'Description' field with the text 'Spring Harbor Formula'. Below the description is a checkbox labeled 'Make this query public and therefore available to all users', which is currently unchecked. A table with three columns: 'Field', 'Type', and 'Expression' is displayed. The table contains two rows: 'LOCAL B' with 'Edit' type and '0101|131' expression, and 'LOCATION' with 'Edit' type and '231' expression. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Field	Type	Expression
LOCAL B	Edit	0101 131
LOCATION	Edit	231

- Give you query a name
- Uncheck “Make this query public....”
- Recheck the main info
- Click “Ok”

You have now saved the query.

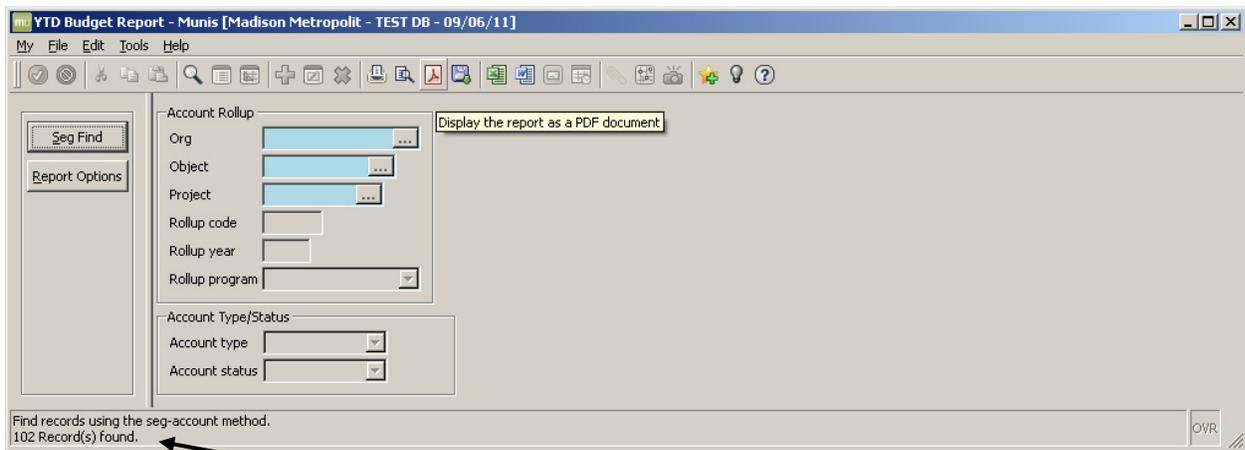
- Click on the “Load” tab:



- Double click on the line of the query you'd like to run.

Note: The "Load Query" folder brings you back to set up page, then you'd have to click execute. So, double click line instead.

This brings you back to the main YTD Report menu:



Note: The lower left shows 102 records found so you know the report is ready to view.

- Click on the Adobe Icon (Display the report as a PDF document) to open the report (below is just the first page):



mu30412001.pdf - Adobe Reader

10/31/2011 10:39 6500708436 Madison Metropolit - TEST DB - 09/06/11 YEAR-TO-DATE BUDGET REPORT PG 1 glytdbud

FOR 2012 12

ACCOUNTS FOR: 0101 General Formula	ORIGINAL APPROP	TRANSFERS/ ADJUSTMENTS	REVISED BUDGET	YTD EXPENDED	ENC/REQ	AVAILABLE BUDGET	PCT USED
10.212.0122.110000.000.0101.231.	0	Middle Sch General Po Sprin 0	0	.00	.00	.00	.0%
10.212.0211.110000.000.0101.231.	0	Middle Sch General Po Sprin 0	0	.00	.00	.00	.0%
10.212.0212.110000.000.0101.231.	0	Middle Sch General Po Sprin 0	0	.00	.00	.00	.0%
10.212.0220.110000.000.0101.231.	0	Middle Sch General Po Sprin 0	0	.00	.00	.00	.0%
10.212.0240.110000.000.0101.231.	0	Middle Sch General Po Sprin 0	0	.00	.00	.00	.0%
10.212.0324.110000.000.0101.231.	0	Middle Sch General Po Sprin 0	0	.00	.00	.00	.0%
10.212.0341.110000.000.0101.231.	0	Middle Sch General Po Sprin 0	0	.00	.00	.00	.0%
10.212.0353.110000.000.0101.231.	0	Postage 0	0	.00	.00	.00	.0%
10.212.0411.110000.000.0101.231.	0	Middle Sch General Po Sprin 0	0	.00	.00	.00	.0%
10.212.0417.110000.000.0101.231.	0	Middle Sch General Po Sprin 0	0	.00	.00	.00	.0%
10.212.0434.110000.000.0101.231.	0	Middle Sch General Po Sprin 0	0	.00	.00	.00	.0%
10.212.0435.110000.000.0101.231.	0	Middle Sch General Po Sprin 0	0	.00	.00	.00	.0%
10.212.0440.110000.000.0101.231.	0	Middle Sch General Po Sprin 0	0	.00	.00	.00	.0%
10.212.0570.110000.000.0101.231.	0	Middle Sch General Po Sprin 0	0	.00	.00	.00	.0%
10.212.0590.110000.000.0101.231.	0	Middle Sch General Po Sprin 0	0	.00	.00	.00	.0%

You can also use saved queries in the "Account Inquire" screen:

- From the "Departmental Functions" menu click "Account Inquiry":



Home - Madison Metropolitan School District - Test - Windows Internet Explorer provided by Madison School District

http://208.64.234.79:10091/sites/mu6500/Test/default.aspx

Denise Scott

My Programs

Show All | Hide All

Financials

- Account Import
- Account Inquiry
- Account Master
- Account X-Reference
- Budget Transfers and Amendments
- Chart of Account Segments
- Chart of Accounts List
- Project Master
- YTD Budget Report

Add a Favorite

Budget Central | Home

Tyler Menu

- Tyler
 - Munis
 - Favorites
 - Financials
 - General Revenues
 - Other Applications
 - Departmental Functions
 - Account X-Reference
 - Account Inquiry
 - YTD Budget Report
 - Vendor Inquiry **glactinq**
 - Purchase Order Inquiry
 - Next Year Budget Entry
 - Requisition Entry
 - Budget Transfers and Amendments
 - Saved Reports
 - Menu Personal Preferences
 - Custom SSRS Reports

Updated: 10/26/2011 5:32 PM

My Workflow

- Notifications 0 (0 Unread)
- Approvals 0 (0 Unread)
- Alerts 0 (0 Unread)

Settings Updated: 10/26/2011 4:28:00 PM

javascript:OnNodeClick("^LeafNode|Tyler|Munis|Departmental%20Functions|Account%20Inquiry|I|glactinq^");

Trusted sites 100%



Account Inquiry - Munis [Madison Metropolitan - TEST DB - 09/06/11]

My File Edit Tools Help

Account

Fund Acct

Org Acct name

Object Type Status Budget Rollup Group

MultiY Fund Account Notes

Detail

Months

Seg Find

Totals Find records using the seg-account method.

Project Strings

4 Year Comparison Current Year History

W/Per 2011/13	Fiscal Year 2011	Fiscal Year 2010	Fiscal Year 2009	Fiscal Year 2012
Original Budget	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Transfers In	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Transfers Out	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Revised Budget	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Actual (Memo)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Encumbrances	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Requisitions	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Inceptn To Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Available	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Percent used	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

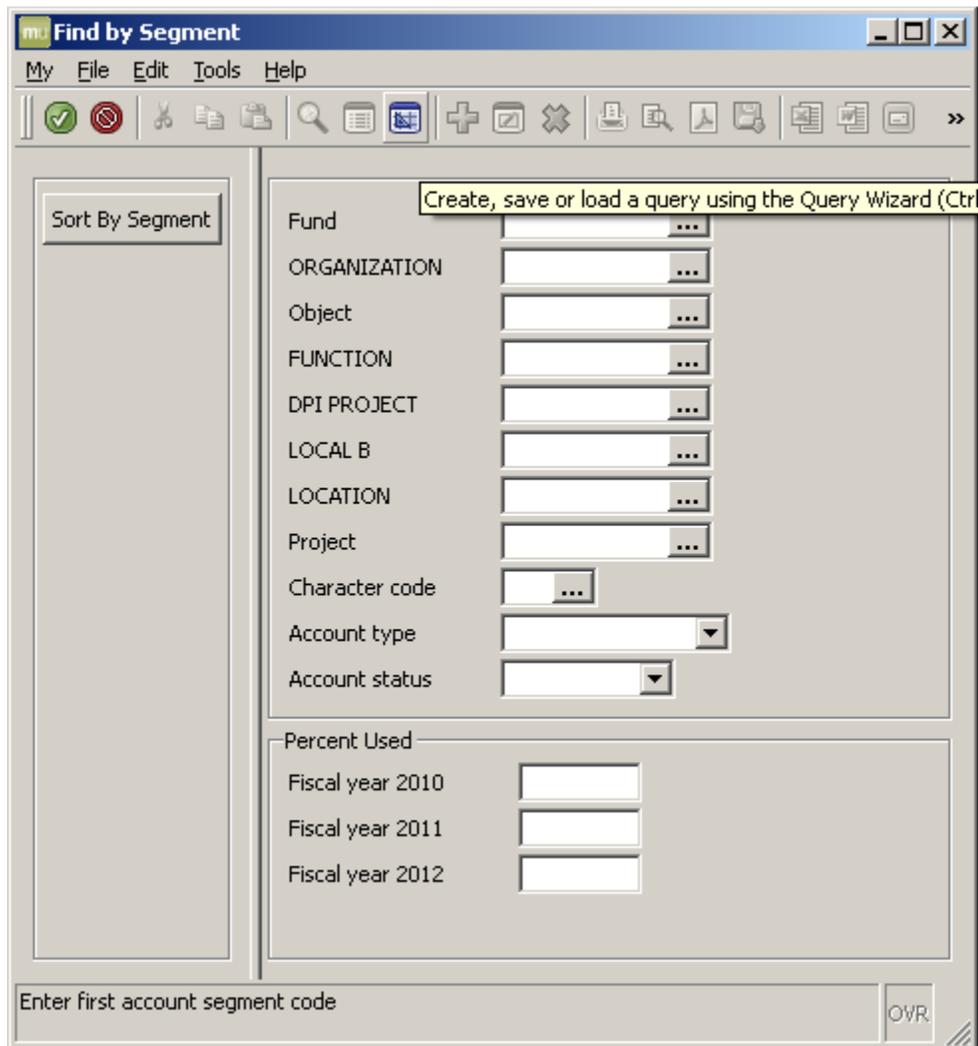
0 of 0

Attachments (0)

Display detail information for current account.

OVR

- From the "Account Inquiry" screen, click "Seg Find:



The query set up follows the same instructions as previously stated but for this example I have included new screen shots:



Query Wizard: G/L Account Inquiry

Query

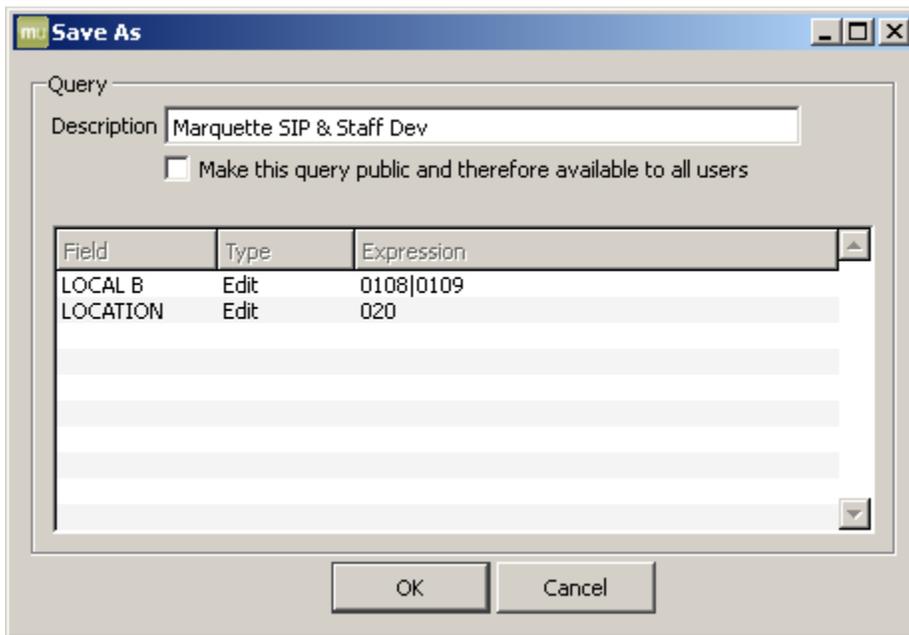
Fields* | Dropdown Assistant | Edit Assistant | Date Assistant | Load | Help

Select field

Field	Type	Expression (enter values here)
Fund	Edit	
ORGANIZATION	Edit	
Object	Edit	
FUNCTION	Edit	
DPI PROJECT	Edit	
LOCAL B	Edit	0108 0109
▶ LOCATION	Edit	020
Project	Edit	
Character code	Edit	
Account type	Dropdown	

You can type directly into the highlighted field or click Format to use the Assistant tab instead.
 Click on the Load tab to run a previously saved query.
 Click on Execute to run the query now or click Save to reuse it in the future.

- Select options and click "Save As":



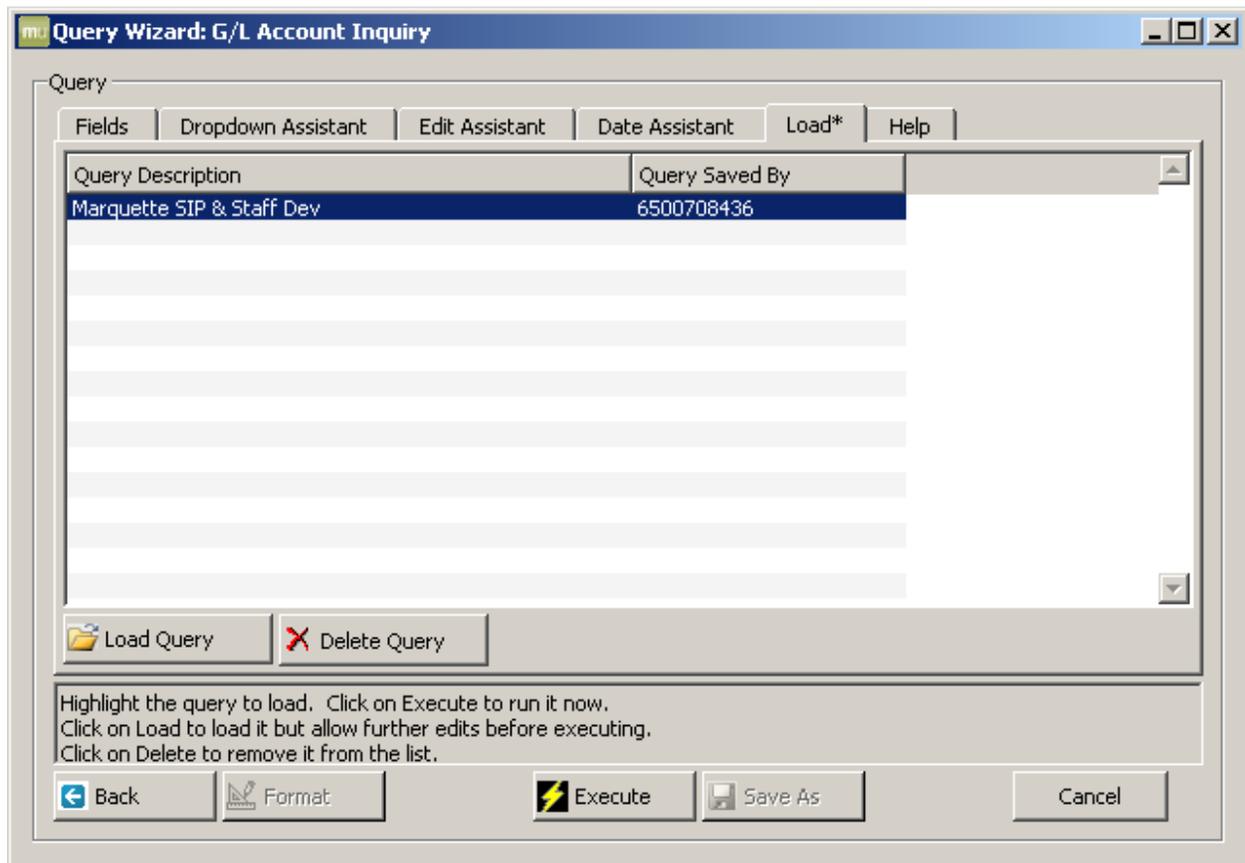
The image shows a 'Save As' dialog box from the 'munis' application. The title bar reads 'mu Save As'. The main area is titled 'Query' and contains a 'Description' text box with the value 'Marquette SIP & Staff Dev'. Below the text box is a checkbox labeled 'Make this query public and therefore available to all users', which is currently unchecked. A table with three columns is visible: 'Field', 'Type', and 'Expression'. The table contains two rows of data.

Field	Type	Expression
LOCAL B	Edit	0108 0109
LOCATION	Edit	020

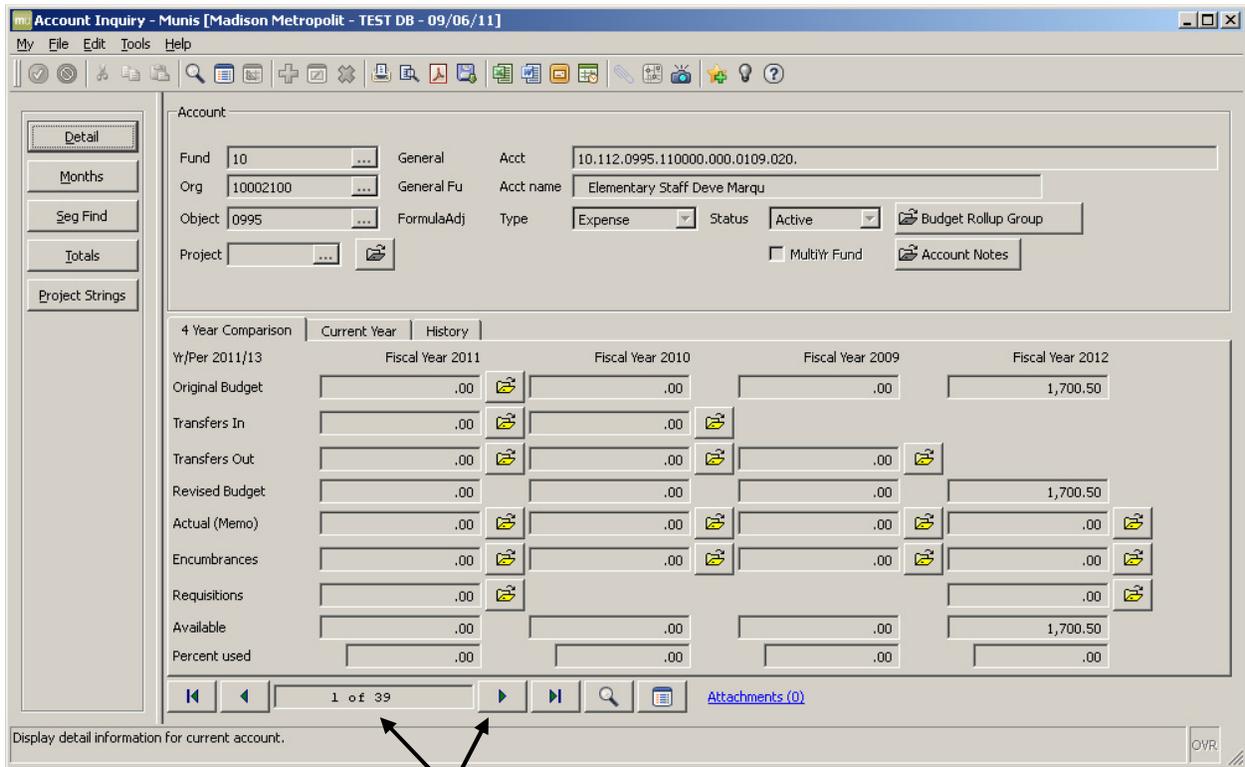
At the bottom of the dialog box are two buttons: 'OK' and 'Cancel'.

- Name your query
- Uncheck “Make this query public...”
- Click Ok

Click on the “Load” tab:



- Double click the Query you'd like to run:

Account Inquiry - Munis [Madison Metropolitan - TEST DB - 09/06/11]

My File Edit Tools Help

Account

Fund 10 General Acct 10.112.0995.110000.000.0109.020.
 Org 10002100 General Fu Acct name Elementary Staff Deve Marqu
 Object 0995 FormulaAdj Type Expense Status Active Budget Rollup Group
 Project MultiYr Fund Account Notes

4 Year Comparison	Current Year	History	Fiscal Year 2011	Fiscal Year 2010	Fiscal Year 2009	Fiscal Year 2012
Yr/Per 2011/13						
Original Budget	.00		.00	.00	.00	1,700.50
Transfers In	.00		.00	.00		
Transfers Out	.00		.00	.00	.00	
Revised Budget	.00		.00	.00	.00	1,700.50
Actual (Memo)	.00		.00	.00	.00	.00
Encumbrances	.00		.00	.00	.00	.00
Requisitions	.00		.00			.00
Available	.00		.00	.00	.00	1,700.50
Percent used	.00		.00	.00	.00	.00

1 of 39

Display detail information for current account.

There are 39 accounts included in this query. To scroll through them, use the arrows at the bottom of the screen. Please see your "Account Inquiry" instructions for more information.