

HOW TO GUIDE

YTD
BUDGET
REPORT

Hub prod



0

Approvals



0

Notifications



0

Alerts

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Step 1:
Click Departmental
Functions under the Tyler
Menu, then select YTD
Budget.

YTD Budget Report [YADKIN COUNTY]

   
Close Accept Cancel Query

YTD Budget Report [YADKIN COUNTY] > 🔍

Account Rollup

Org ...
Object ...
Project ...
Rollup code

Account Type/Status

Account type
Account status

Enter the Org code.

Step 2:

Enter the appropriate code for your ORG. (Yes, that is all!) Then, hit the Accept button indicated by a checkmark.

YTD Budget Report [YADKIN COUNTY]



YTD Budget Report [YADKIN COUNTY]

Account Rollup

Org

Object

Project

Rollup code

Account Type/Status

Account type

Account status

Find records using the seg-account method.
33 Record(s) found.

Step 3:
Click on Report Options,
which is located on the
far-right side of the tool
bar along the top of the
screen.

Report Options

Back | Accept | Cancel

YTD Budget Report [YADKIN COUNTY] > Report Options > 

Report Sequence

Execute this report Now

	Field #	Total	Page Break
Sequence 1	9 - Org	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sequence 2	11 - Object	<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 2025 / 13

Carry forward Totals (GAAP)

Print MTD version ☒

Format type Standard format

Double space ☐

When is the report to be executed?

Step 4:
Under Print Option,
change the YEAR/PERIOD
to that Fiscal Year which
you are inquiring. For
example, 2025 / 13.

Report Options

Back Accept Cancel

YTD Budget Report [YADKIN COUNTY] > Report Options >

	Field #	Total	Break
Sequence 1	9 - Org	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sequence 2	11 - Object	<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

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	Journal entries
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 checked="" type="checkbox"/>	Multiyear view	Default view
		Amounts/totals exceed 999 million dollars	<input type="checkbox"/>

From yr/per 2025 1
To yr/per 2025 13

When is the report to be executed?

Step 5:
Under Additional Options, change the YEAR/PERIOD to that Fiscal Year which you are inquiring start to finish. For example, 2025 / 1 TO 2025 / 13.

Report Options

Back Accept Cancel

YTD Budget Report [YADKIN COUNTY] > Report Options > ✎

Report Sequence

Execute this report Now

	Field #	Total	Page Break
Sequence 1	9 - Org	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sequence 2	11 - Object	<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

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	Journal entries
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 checked="" type="checkbox"/>	Multiyear view	Default view
		Amounts/totals exceed 999 million dollars	<input type="checkbox"/>

Please select a sort order.

Journal Entry Sort

For AP source journals, show:

(1) Voucher

(2) PO

(3) Invoice



OK

Cancel

Step 6:

Once you have made all those changes, click on the "Accept" checkmark. You will see Sort box pop up, do not change anything and click OK.

YTD Budget Report [YADKIN COUNTY]



YTD Budget Report [YADKIN COUNTY]

Account Rollup

Org

Object

Project

Rollup code

Account Type/Status

Account type

Account status

Define sequencing, totals, spacing, etc.
33 Record(s) found.

Step 7 (FINAL STEP):
After you click OK, hit the
Back options along the
top tool bar that will take
you to the image shown.
Then, click on the PDF
option in the center of the
tool bar along the top.

