

HOW TO GUIDE

YTD

BUDGET

REPORT

Hub prod

Approvals 0 : Notifications 0 : Alerts 0 :

Tyler Menu

- Enterprise ERP
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 - General Revenues
 - Asset Maintenance
 - Other Applications
- Departmental Functions
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 - YTD Budget Report**
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 - Purchase Order Inquiry
 - Employee Inquiry
 - Next Year Budget Entry
 - Requisition Entry
 - Budget Transfers and Amendments
 - Requisition Approvals
 - Commodity Codes
 - Position Inquiry
 - Job Class Inquiry

Favorites

- Recent Activity
- Financials**
- System Administration

Tyler Links

- Tyler Search: Find just what you are looking for
- Tyler Community: Join thousands of other clients online
- Tyler Support: Let us help you
- Tyler Tech website: The leader in public sector software

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

The logo for Tyler Technologies, featuring a stylized cluster of green and blue dots to the left of the word "tyler" in a lowercase, bold, blue sans-serif font, with "technologies" in a smaller, green sans-serif font below it.

YTD Budget Report [YADKIN COUNTY]

YTD Budget Report [YADKIN COUNTY] >

Account Rollup

Org
Object
Project
Rollup code

Account Type/Status

Account type
Account status

Enter the Org code.

2

1

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]

The screenshot shows the 'YTD Budget Report [YADKIN COUNTY]' window. At the top is a toolbar with various icons: Close, Search, Output, Print, Display, PDF, Save, Excel, Word, Seg Find, and Report Options. A blue arrow points from the text in the purple box to the 'Report Options' icon. Below the toolbar, the report title is displayed, followed by sections for 'Account Rollup' and 'Account Type/Status' with dropdown menus. At the bottom, a message indicates 33 records found.

YTD Budget Report [YADKIN COUNTY]

Account Rollup

Org: 1054170

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

	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 *

Print Options

Additional Options

Report Options

Include only accounts that used % or greater of budget

Order accounts by

Totals only

Account description

Print full GL account

Roll projects to object

Print report options



Year/period

/

Carry forward

Print MTD version

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.

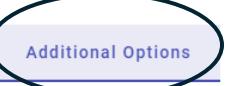
Report Options

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 *

Print 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	<input type="checkbox"/>
Print revenue budgets as zero	<input type="checkbox"/>	Detail format option	<input type="checkbox"/>
Include fund balance	<input type="checkbox"/>	Include additional JE comments	<input type="checkbox"/>
Print journal detail	<input checked="" type="checkbox"/>	Multiyear view	<input type="checkbox"/>
		Amounts/totals exceed 999 million dollars	<input type="checkbox"/>

From yr/per

To yr/per

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 [Y-DKIN COUNTY] > Report Options >

Report Sequence

Execute this report

Page

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 *

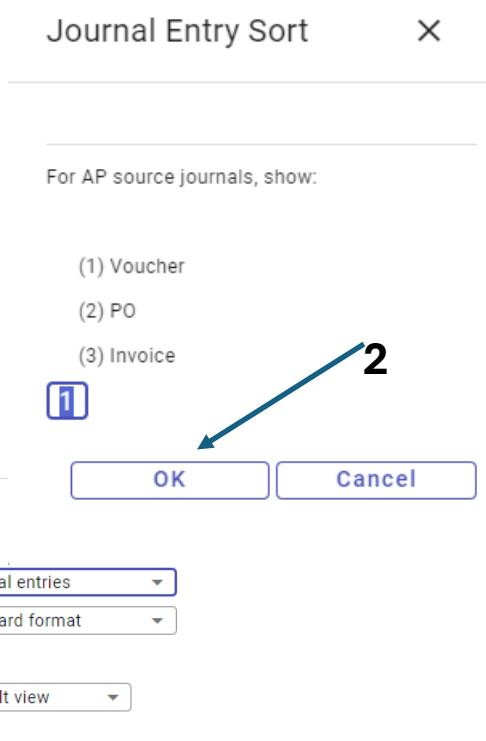
Print Options

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	<input type="button" value="Journal entries"/>
Print revenue budgets as zero	<input type="checkbox"/>	Detail format option	<input type="button" value="Standard format"/>
Include fund balance	<input type="checkbox"/>	Include additional JE comments	<input type="checkbox"/>
Print journal detail	<input checked="" type="checkbox"/>	Multyear view	<input type="button" value="Default view"/>
Amounts/totals exceed 999 million dollars <input type="checkbox"/>			

Please select a sort order.

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]

Close | Search | Output | Print | Display | **PDF** | Save | Excel | Word | Seg Find | Report Options

YTD Budget Report [YADKIN COUNTY]

Account Rollup

Org: 1054170

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.

