

Home **Account Management** Vendors Purchasing Accounts Payable Fixed Assets Custom Reports Federal/State Reporting Administration

Financial Management Setup

Account Management Setup

▼ **Account Master** Setup

Account Profile
Chart of Accounts
Account Summary Templates
Operating Statement Accounts
Balance Sheet Accounts

▼ **Account Management Reporting**

Budgetary Data Mining

Vendor Check History
General Inputs History
Batch Reports

▼ **General Inputs** Setup

▼ **Journal Entry** Setup

Submit Journal Entry
Approvals
Journal Entry

Update - Journal Entries
History - Journal Entries

Update - Cash Receipts
History - Cash Receipts
History - Cash Receipts

Receivable

ing

Year Adjustments

Previous Year Adjustments
Update History - Previous Year Adj

▼ **Project/Grant Management**

Project/Grant Entry
Reports

1. Select Account Management

2. Under Account Management Reporting, select Budgetary Data Mining

A better solution for your district.

Budgetary Data Mining ★

Views: All Report Types
 Filters: *District Report Templates

Report Name ▲	Report Title	Created By	Access	Report Type	D
▶ Fund 199 Detail	Detail Budget Status Report	PETREAMB000	R	Revenue/Expense Detail	Y
▶ Fund 199 Summary	Summary Budget Status Report	PETREAMB000	R	Revenue/Expense Summary	Y
▶ Fund 461 Detail	Detail Campus Activity Report	PETREAMB000	R	Revenue/Expense Detail	Y
▶ Fund 461 Summary	Summary Campus Activity Report	PETREAMB000	R	Revenue/Expense Summary	Y
▶ Fund 865 Detail	Detail Student Activity Report	PETREAMB000	R	Balance Sheet Detail	Y
▶ Fund 865 Summary	Summary Student Activity Report	PETREAMB000	R	Balance Sheet Summary	Y

Add
 Edit
 Delete
 Clone
 Print
 Excel
 Schedule This Report

3. Set your view to All Report Types and filter to District Report Templates.

4. Select the report you want to run

5. Click Print

You can also click Excel to run the report in Excel rather than PDF.

Runtime Parameters - WF\AM\RP\DM\DM - 27021 - 05.13.06.00.04-10.2 - Windows Intern...

Runtime Parameters

Runtime Report Parameters

Report Name: Fund 199 Detail

Start Date: 09/01/2012 Saturday

End Date: 08/31/2013 Saturday

☐ Print Title Page

☐ Print Greenbar

Runtime Report Setup

How do you want to change runtime setup?

☒ Use current setup - no change

☐ Change setup for this run only - do not save

☐ Change setup for this run and save setup

Report Name: Fund 199 Detail

Parameters

Breaks

Account Ranges

Field Selection

Sources

Check Spelling

Print

Back

100%

Print Setup for Detail Reports

Runtime Parameters - WF\AM\RP\DM\DM - 27021 - 05.13.06.00.04-10.2 - Windows Intern...

Runtime Parameters

Runtime Report Parameters

Report Name: Fund 199 Summary

Reporting Month: Entered Month

Select Month: July

Year: 2013

☐ Print Title Page

☐ Print Greenbar

Runtime Report Setup

How do you want to change runtime setup?

☒ Use current setup - no change

☐ Change setup for this run only - do not save

☐ Change setup for this run and save setup

Report Name: Fund 199 Summary

Parameters

Breaks

Account Ranges

Field Selection

Check Spelling

Print

Back

100%

Report Name:

Print Setup for Summary Reports

6. Verify the date for the report

7. Click Print.

Note: The Print button will change to "Excel" if you're running the report in Excel.

Budgetary Data Mining ★

Views: All Report Types
Filters: *District Report Templates



- Add
- Edit
- Delete
- Clone
- Print
- Excel
- Schedule This Report

Report Name ▲	Report Title	Created By	Access	Report Type	D
▶ Fund 199 Detail	Detail Budget Status Report	PETREAMB000	R	Revenue/Expense Detail	Y
▶ Fund 199 Summary	Summary Budget Status Report	PETREAMB000	R	Revenue/Expense Summary	Y
▶ Fund 461 Detail	Detail Campus Activity Report	PETREAMB000	R	Revenue/Expense Detail	Y
▶ Fund 461 Summary	Summary Campus Activity Report	PETREAMB000	R	Revenue/Expense Summary	Y
▶ Fund 865 Detail	Detail Student Activity Report	PETREAMB000	R	Revenue/Expense Detail	Y
▶ Fund 865 Summary	Summary Student Activity Report	PETREAMB000	R	Revenue/Expense Summary	Y

Request Complete

R/E Dtl Rpt: Fund 199 Detail 09/01/2012-08/31/2013 has finished processing.

View Report

Back

8. You will receive a pop up when the report is done. Click View Report to view a PDF of the report. You can then print the report or save it.

9. If you close the report before you were finished with it, click My Print Queue to see a listing of the reports you've run.

200 6 records displayed

Report Name: ABC

My Print Queue



Print Queue for Amber Petree



View

Delete

Rerun

Convert to
Excel

View Status

Tasks

Save this
Report

Saved
Reports

Back

Date ▼	Time	Report Description	Wait List #	Status	Time	Format	Current Key
07/24/2013 Wed	9:11 AM	R/E Sum Rpt: Fund 199 Summary 07/2013		Completed	00:01:39	PDF	
07/24/2013 Wed	9:10 AM	R/E Sum Rpt: Fund 199 Summary 06/2013		Completed	00:02:58	PDF	
07/24/2013 Wed	9:08 AM	R/E Dtl Rpt: Fund 199 Detail 09/01/2012-08/31/201		Completed	00:00:13	PDF	
07/24/2013 Wed	9:08 AM	R/E Dtl Rpt: Fund 199 Detail 09/01/2012-08/31/201		Completed	00:00:13	PDF	
07/23/2013 Tue	5:12 PM	Gen					
07/23/2013 Tue	5:12 PM	Gen					
07/23/2013 Tue	3:25 PM	R/E					
07/23/2013 Tue	9:20 AM	B/S					
07/23/2013 Tue	9:20 AM	B/S					
07/23/2013 Tue	8:34 AM	R/E					
07/23/2013 Tue	8:31 AM	R/E					
07/22/2013 Mon	2:20 PM	Che					
07/22/2013 Mon	2:19 PM	Che					
07/22/2013 Mon	1:31 PM	Requisition/PO Listing Report - Requisition/PO Listin		Completed	00:00:06	PDF	

10. Select the report you want to view, then click View.

The Rerun button will rerun the report.

The Convert to Excel button will convert the PDF file into Excel.

25 records displayed

Records above are automatically deleted after 30 days.