Data Miner Techniques

How Can I See a Summary of My YTD Budget at the DA and Fund Levels Only?

How Do I View Year to Date Summary Information in Data Miner?

You can view summary information for your DAs using the YTD Budget Status analysis, which can be found in the EBO Finance folder in your Data Miner catalog.

![YTD Budget Status Analysis](image)

Several of the YTD Budget Status filters default to the most commonly used option.

<table>
<thead>
<tr>
<th>Filter</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Type</td>
<td>Expense; Revenue</td>
</tr>
<tr>
<td>Budget Name</td>
<td>The current fiscal year (FY) budget</td>
</tr>
<tr>
<td>Ledger Name</td>
<td>WVU General Ledger</td>
</tr>
<tr>
<td>Fringe</td>
<td>Include – By default, the results will show fringe.</td>
</tr>
<tr>
<td>Exclude Zeroes</td>
<td>Y (Yes) – By default, the results will not show rows with all zeroes.</td>
</tr>
</tbody>
</table>

The YTD Budget Status analysis requires you to complete the following filters:

- **Period Name**
- **Account Type**
- **Budget Name**
- **Departmental Activity (DA)** – See our “Searching by Multiple DAs” guide to learn the four methods to search for multiple DAs.

Select the Yes radio button for Run Analysis, and then click Apply. Results will return summary information based on the criteria you entered.
Can I Get Rid of All These Line Items?

By default, the analysis will return all sections of the general ledger (campus, DA, fund, line item, function, and project) with subtotals for the DAs and funds and a grand total for the account type (expense, revenue, etc.).

If you only need to see totals for the funds and DAs, you can get rid of the other segments. The line items, in particular, can take up a lot of space, which uses more paper when printing.

To view totals for only the DAs and funds,

1. Exclude the following columns:
   - Line Item
   - Line Item Name
   - Function
   - Function Name
   - Project
   - Project Name

   To exclude a column, right-click in the column’s header and select *Exclude column*.

You can exclude some of the other columns if you do not want them, but there are a few exceptions:

- Do NOT get rid of the **DA** and **Fund** columns if you want to see totals for each DA and fund (you can get rid of the **DA Name** and **Fund Name** columns, however, if you do not want to see that information).
- Do NOT get rid of the **Account Type** column if you want to see the **Expense Total** at the bottom.
After you exclude the columns, you will see duplicate rows, because the analysis is still showing an additional subtotal for each fund.

<table>
<thead>
<tr>
<th>Fund</th>
<th>Fund Name</th>
<th>YTD Budget</th>
<th>YTD Actual</th>
<th>YTD Encumb</th>
<th>YTD Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>1110037</td>
<td>3000100000 STATE APPROPRIATED</td>
<td>$1,483,166.69</td>
<td>$1,051,905.83</td>
<td>$391,303.10</td>
<td>$39,957.66</td>
</tr>
<tr>
<td>1110037</td>
<td>Total</td>
<td>$1,483,166.69</td>
<td>$1,051,905.83</td>
<td>$391,303.10</td>
<td>$39,957.66</td>
</tr>
<tr>
<td>11100241</td>
<td>861011 HERF REGULAR 14%</td>
<td>$25,996.00</td>
<td>$8,554.35</td>
<td>$0.00</td>
<td>$17,441.65</td>
</tr>
<tr>
<td>11100241</td>
<td>Total</td>
<td>$25,996.00</td>
<td>$8,554.35</td>
<td>$0.00</td>
<td>$17,441.65</td>
</tr>
</tbody>
</table>

2. To get rid of the additional subtotals, right-click in the Fund column header, and hover the mouse pointer over Show Subtotal.

There will be a check mark in front of After Values. Click None to get rid of the subtotals. If you hover over Show Subtotal now, there should be a check mark in front of None.

The final result will be a summary of your funds and DAs as well as the grand total for all expenses, revenues, and any other account type by which you filtered.

<table>
<thead>
<tr>
<th>Account Type</th>
<th>Campus</th>
<th>DA</th>
<th>Fund</th>
<th>Fund Name</th>
<th>YTD Budget</th>
<th>YTD Actual</th>
<th>YTD Encumb</th>
<th>YTD Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense</td>
<td>11</td>
<td>89640100</td>
<td>1110037</td>
<td>3000100000 STATE APPROPRIATED</td>
<td>$1,483,166.69</td>
<td>$1,051,905.83</td>
<td>$391,303.10</td>
<td>$39,957.66</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11100241</td>
<td>$25,996.00</td>
<td>$8,554.35</td>
<td>$0.00</td>
<td>$17,441.65</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11100458</td>
<td>$230,251.86</td>
<td>$257,322.41</td>
<td>$0.00</td>
<td>($26,970.55)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11100161</td>
<td>$4,500.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$4,500.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11104266</td>
<td>$17,000.00</td>
<td>$6,219.27</td>
<td>$630.00</td>
<td>$10,150.72</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11104268</td>
<td>$15,000.00</td>
<td>$114.52</td>
<td>$0.00</td>
<td>$14,885.47</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11105411</td>
<td>$15,000.00</td>
<td>$6,699.12</td>
<td>$0.00</td>
<td>$13,300.88</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11105418</td>
<td>$13,000.00</td>
<td>$936.29</td>
<td>$0.00</td>
<td>$12,063.71</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11106563</td>
<td>$20,000.00</td>
<td>$257.73</td>
<td>$0.00</td>
<td>$19,742.27</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11107026</td>
<td>$40,000.00</td>
<td>$23,302.94</td>
<td>$0.00</td>
<td>$10,697.06</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11107027</td>
<td>$45,000.00</td>
<td>$48,153.48</td>
<td>$0.00</td>
<td>($3,153.48)</td>
</tr>
<tr>
<td>Expense Total</td>
<td></td>
<td></td>
<td></td>
<td>89640100</td>
<td>$1,909,014.55</td>
<td>$1,407,465.92</td>
<td>$390,933.21</td>
<td>$110,615.42</td>
</tr>
</tbody>
</table>

Tip! Save time in the future by saving your customization. The next time you open YTD Budget Status, apply your saved customization, change filters as needed, and run the analysis. Learn more about saving and applying customizations by viewing our “Saving Customizations” guide.