

Directions for ESSA/SLF Data Mining report in SMS 2.0

Go to Web/ Financial Management/ Account Management/ Account Management Reporting/ Budgetary Data Mining.

Add a report, choose Revenue/Expense Summary for a Report Type.

In the Parameters section set Consolidate Funds to No, Budget Status to All Accounts, Print Detail to Yes, Detail Spacing to Single, Print Totals to No, Suppress Zero Amounts to No.

In the Breaks section set the Sequence to R – Regular Account Sequence and don't set any breaks.

In the Account Ranges section **choose Expense accounts only** and leave the Range wide open.

In the Field Selection section choose Account Number, Account Level Description and FYTD Activity.

After saving click on Excel to get your report. Set the Reporting Month to Entered Month, Select Month needs to be June to capture the entire Fiscal Year and then choose the correct Year.

Open the Excel and insert 5 columns between the Account Number and Account Description columns and Save.

Please save the file in .xlsx Excel format before uploading it to the portal.