

BUDGET AMENDMENT QUERY INFORMATION

In addition to IMS databases, Budget Amendment data is stored in DB2 tables, which provide ad hoc reporting capability for campus clients. These tables are accessible through Query Management Facility (QMF) which is a tool for querying DB2 data tables and creating ad hoc reports. QMF can be accessed through the QMF for Windows client. QMF for Windows allows a user to point and click various options for reporting and data retrieval in a user friendly environment. This software is site licensed and available to UGA employees via download from <http://www.eits.uga.edu/accserv/query>.

All IMS UserIDs with access to the Budget System have access to the Budget Amendment DB2 tables.

Data from QMF queries can be copied into spreadsheet programs using copy/paste.

QMF manuals are available at the University Bookstore. Recommended manuals include Getting Started with QMF for Windows, Using QMF, and QMF Reference -- all Version 6.

Attached are the following items:

- Listing of Budget Amendment Query Tables
- Table QUERY.BUD_SUMMARY_OBJECT
- Table QUERY.BUD_POSITION_ACCOUNT
- Instructions for sample query from BUD_SUMMARY_OBJECT
- Instructions for sample query from BUD_POSITION_ACCT

Instructions for Sample Query Using BUD_SUMMARY_OBJECT Table

This query will produce a list of general operations accounts with original budget, amended budget, expenditures, and budget balance for a selected department.

Open QMF for Windows

- To create a prompted query, click on File-New-Query.
- Click on the yellow plus (+) button on the Tables option. Type in **QUERY** in the table owner field, leaving the table name field blank, and click on Add From List.
- When requested, key in your IMS UserID and password. A list of available tables will be displayed.
- Choose table BUD_SUMMARY_OBJECT and click on Add. Then click on Close.
- Choose the columns for your report:
 - Choose A.Account_Desc and click on Add (or double click).
 - Choose A.Account_Object and click on Add.
 - Choose A.Summary_Obj_Desc and click on Add.
 - Choose A.Original_Budget and click on Add.
 - Choose A.Amended_budget and click on Add.
 - Type in expression
A.FY_ACTUAL+A.CURR_OBLIGATION+A.CURR_COMMITMENT
and enter new column name Expenditures. Click on Add.
 - Choose A.BUDGET_BALANCE, click on Add, and then click on Close.
- Select sort conditions for the chosen columns:
 - Choose A.ACCOUNT_OBJECT in Ascending order and then click on Close.
- To select the items for the query, use row conditions:
 - Choose A.FISCAL_YEAR is equal to 'XXXX' and click on Add. Note that all selection data should be keyed in uppercase.
 - Choose A.FUND is equal to '10' and click on Add.
 - Choose A.FUNCTION is not equal to '99' and click on Add.
 - Choose A.OPERATION is equal to 'G' or 'C' and click on Add.
 - Choose A.DEPARTMENT is equal to 'nnn' (your department number) and click on Add.
 - Choose A.SUMMARY_OBJECT is greater than '50000' click on Add.
 - Choose A.SUMMARY_OBJECT is not between '51400' and '51900' to eliminate fringe benefits, click on Add and then click on Close.
- Run the query by clicking on the green arrow button on the toolbar or by clicking on Query-Run.
- To return to the prompted query screen to make changes, click on the

- magnifying glass on the tool bar.
- Save the query to your library by clicking on the yellow cylinder with the disk on your toolbar or by clicking on File-Save At Server. (To open a saved query from the server, click on the yellow cylinder with folder on your toolbar or by clicking on File-Open From Server.)
- Forms (reports) can be created for a formatted printed output or you can copy and paste the data directly into a spreadsheet program.

Format Report:

- After the query results display, click on Results then display report . Select Default form and click on OK. A basic report will display.
- Click on the Columns button that has 3 columns of lines. There are many different options to format the columns of the report.
 - Click on any of the heading names to change the name of a column heading.
 - Click under the Usage column beside each of the amount column headings and select SUM to total each column.
 - Click on the numbers in the Indent column to change the number of spaces between columns.
 - Click on the numbers in the Width column to change the column width. Change the width of the Expenditures column from 16 to 10.
 - Click on the L under the Edit column and change it to K. This option will put a comma to separate thousands. K2 puts a comma separator with 2 decimal spaces.
 - Click on OK.
- Click on the Page button which looks like a white piece of paper with lines across the top and bottom.
 - Under Page Heading Text, click on the space under Text to type in a heading. The text can be aligned.
 - Click on OK.
- Click on File-Page Setup to change the orientation, margins, and other page setup options (note page width number of characters). Click on OK.
- Click on Form-Set Font to change the size of the font.
- Click on the Print Report button which is the button with the paper pointing down to a printer (usually the last button on the second row of buttons) to print the report. Click on OK.
- Save the form to your library by clicking on the yellow cylinder with the disk on the toolbar or by clicking on File-Save At Server. You must save the query and the form separately. Tip: Save the form with the same name as the query but add a "F" in the first position.

Instructions for Sample Query Using BUD_POSITION_ACCOUNT Table

This query will produce a list of positions paid from selected accounts with name, title, salary, original budget and amended budget.

Open QMF for Windows

- To create a prompted query, click on File-New-Query.
- Click on the yellow plus (+) button on the Tables option. Type in **QUERY** in the table owner field, leaving the table name field blank, and click on Add From List.
- When requested, key in your IMS UserID and password. A list of available tables will be displayed.
- Choose table BUD_POSN_ACCOUNT and click on Add. Then click on Close.
- Choose the columns for your report:
 - Choose A.ACCOUNT and click on Add (or double click).
 - Choose A.POSITION and click on Add.
 - Choose A.EMPLOYEE_NAME and click on Add.
 - Choose A.POSITION_TITLE and click on Add.
 - Choose A.ANNUAL_SALARY and click on Add.
 - Choose A.ORIGINAL_BUDGET and click on Add.
 - Choose A.TOTAL_BUDGET, click on add, and then click on Close.
- Select sort conditions for the chosen columns:
 - Choose A.ACCOUNT in Ascending order and click on Add.
 - Choose A.POSITION in Ascending order, click on Add, and then click on Close
- To select the items for the query, use row conditions:
 - Choose A.FISCAL_YEAR is equal to 'XXXX' and click on Add. Note that all selection data should be keyed in uppercase.
 - Choose A.FUND is equal to '10' and click on Add.
 - Choose A.OPERATION is equal to 'G' or 'C' and click on Add.
 - Choose A.DEPARTMENT is equal to 'nnn' (your department number) and click on Add.
 - Choose A.SHORT_TITLE is not equal to 'STFBE', click on Add, and then click on Close.
- Run the query by clicking on the green arrow button on the toolbar or by clicking on Query-Run.
- To return to the prompted query screen to make changes, click on the magnifying glass button on the toolbar.
- Save the query to your library by clicking on the yellow cylinder with the disk on the toolbar or by clicking on File-Save At Server. (To open a saved query from the server, click on the yellow cylinder with the folder on the

- toolbar or by clicking on File-Open From Server.)
- Forms (reports) can be created for a formatted printed output or you can copy and paste the data directly into a spreadsheet program.

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 - Click on any of the heading names to change the name of a column heading.
 - Click under the Usage column beside each of the amount column headings and select SUM to total each column.
 - Click on the numbers in the Indent column to change the number of spaces between columns.
 - Click on the numbers in the Width column to change the column width.
 - Click on the L under the Edit column and change it to K. This option will put a comma to separate thousands. K2 puts a comma separator with 2 decimal spaces.
 - Click on OK.
- Click on the Page button which looks like a white piece of paper with lines across the top and bottom.
 - Under Page Heading Text, click on the space under Text to type in a heading. The text can be aligned.
 - Click on OK.
- Click on File-Page Setup to change the orientation, margins, and other page setup options. (Note page width number of characters) Click on OK.
- Click on Form-Set Font to change the size of the font.
- Click on the Print Report button which is the button with the paper pointing down to a printer to print the report. Click on OK.
- Save the form to your library by clicking on the yellow cylinder with the disk on the toolbar or by clicking on File-Save At Server. You must save the query and the form separately. Tip: Save the form with the same name as the query but add a "F" in the first position.