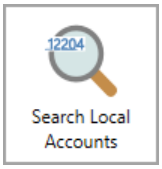
Search Local and Global Accounts

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The instructions in this article relate to ***Search Local Accounts*** and ***Search Global Accounts***. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

Search Local Accounts and ***Search Global Accounts*** are used to report account codes that either have a different description or do not exist in the Master Chart. They also include account codes that match the Master Chart and can be used when reviewing account codes in ***Account Maintenance*** and ***Change Code Number***.

These searches assist with account code reporting, account code cleanup, and the Post Building Transfer process. ***Search Local Accounts*** is best suited to a single building because the building filter is immediately available, while ***Search Global Accounts*** reports across all buildings. Searches can be saved for continuous use, and the information can then optionally be exported to Excel or produced into a PDF-style document.

Searches

Many search screens use the same layout and tabs, even though each one reports on a different area of data. Once you understand how the search screen works, the same process can be applied across a range of searches.

Search Local Accounts and Search Global Accounts | Security

To access ***Search Local Accounts*** and ***Search Global Accounts***, the user must have permission set to *Allow* for *Search Local Accounts* and *Search Global Accounts* under the *Menu* category in ***Security Setup***.

Search Local Accounts and Search Global Accounts | What it can report on

Search Local Accounts and ***Search Global Accounts*** report on account codes and how they compare to the Master Chart. This includes account codes that match the Master Chart, account codes with a different description, and account codes that do not exist in the Master Chart. By default, the searches

can include fields such as Account Code, Description, and Master Chart Status, and ***Search Global Accounts*** also includes Building Number.

This is useful when you need to review account code differences, clean up transferred data, or identify accounts that need to be updated in ***Account Maintenance*** or ***Change Code Number***. These searches are also the primary tool to use with the Post Building Transfer process.

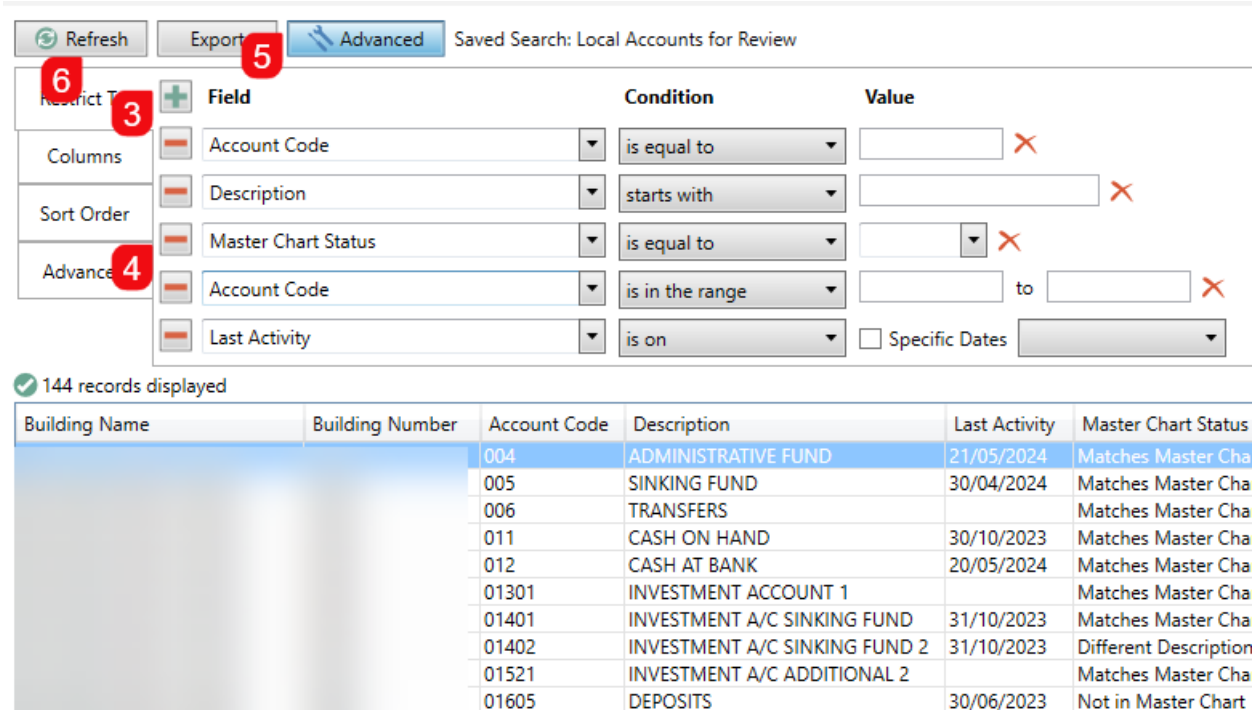
Search Local and Global Accounts | Recommended search examples

Review account codes for a single building or across all buildings

This search can be used to review account codes for one building or across all buildings, depending on which search is selected.

1. Search for or select ***Search Local Accounts*** or ***Search Global Accounts***.
2. Review the default fields, which include *Account Code, Description,* and *Master Chart Status.*

   Search Global Accounts will also include *Building Number* and *Building Name.*
3. Add any additional fields required for the review.
4. Click *Refresh* to display the records.
5. Review the results, or export them if required.



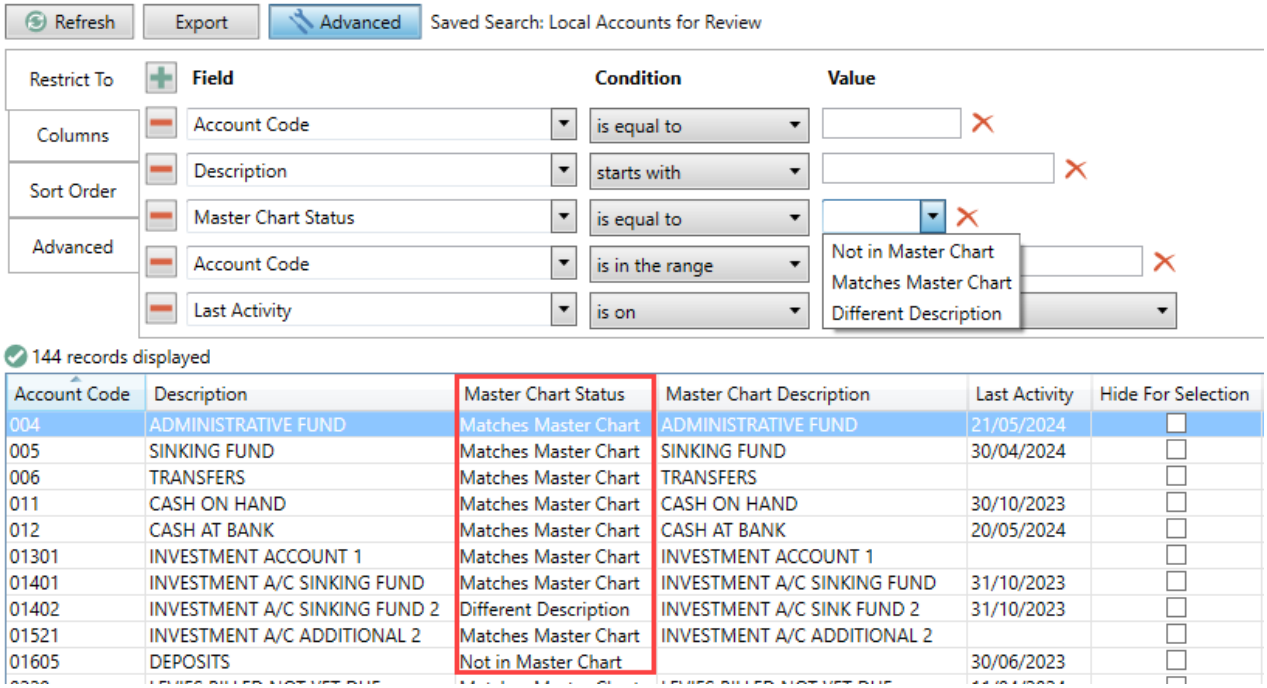
Report on Master Chart Status for account code cleanup

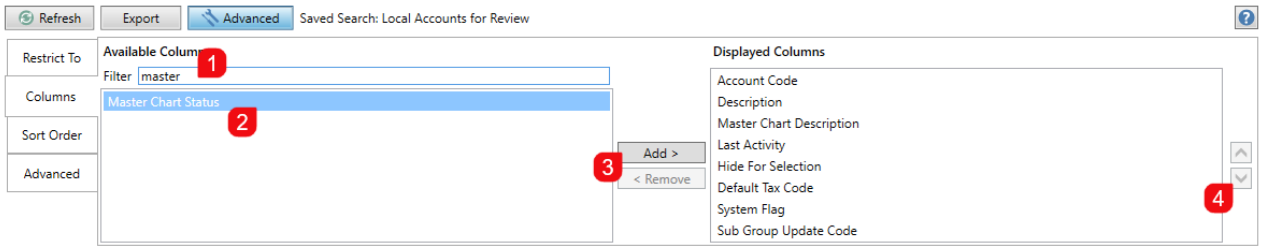
This search can assist with account code cleanup by reporting which account codes are not in the Master Chart, match the Master Chart, or have a different description.

The available **Master Chart Status** values are:

- Not in the Master Chart.
- Matches Master Chart.
- Different Description.

1. Search for or select ***Search Local Accounts*** or ***Search Global Accounts***.
2. Adjust the *Restrict To* tab to include *Master Chart Status.*
3. Click *Columns* to add *Master Chart Status* to the displayed columns.
4. Click *Refresh* to display the records.
5. Click *Export* to produce the results into an Excel report if required.





Use the search during a Post Building Transfer review

This search can be used during the Post Building Transfer process to identify account codes that need to be aligned with the Master Chart.

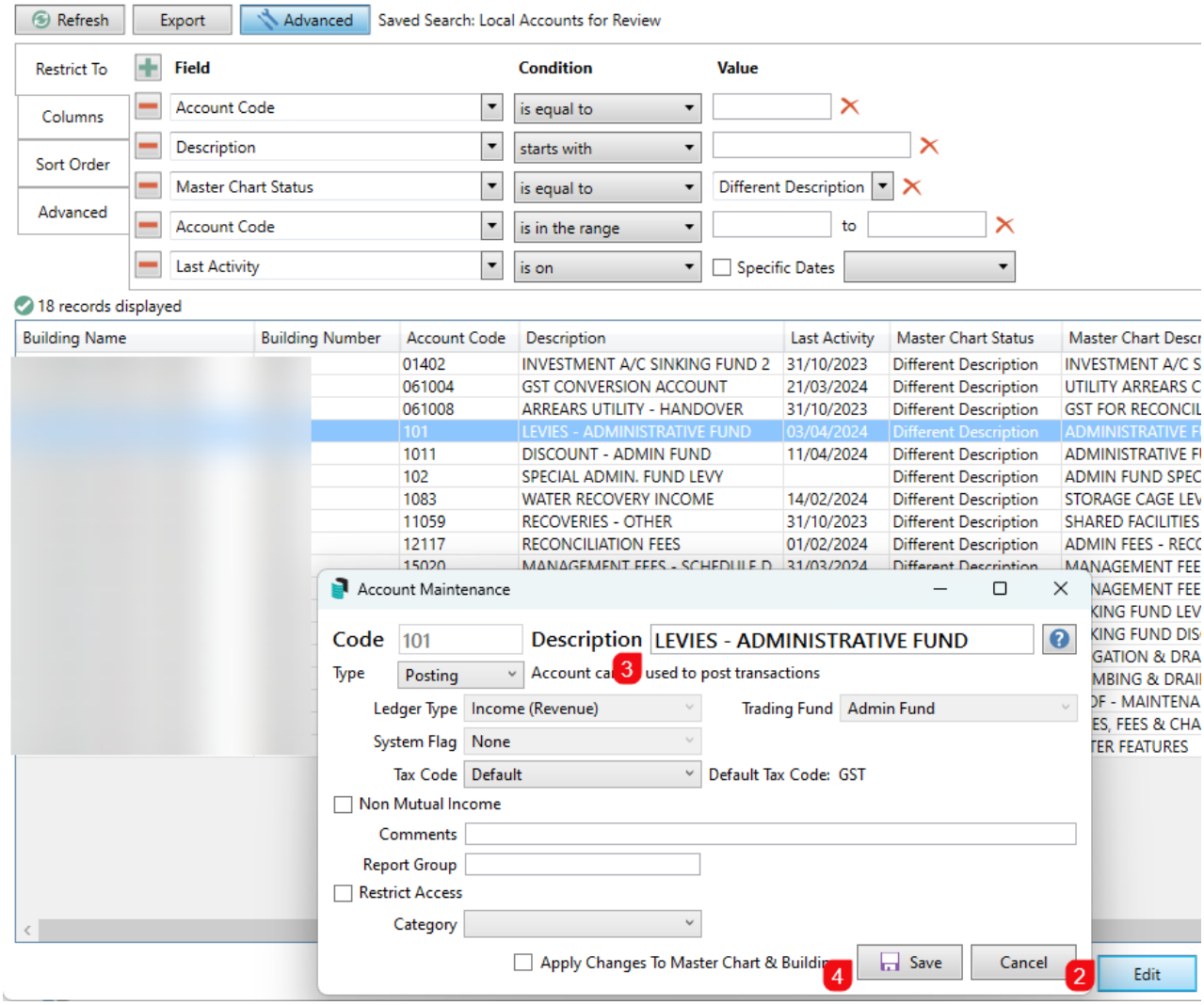
1. Search for or select ***Search Local Accounts*** for a single building, or ***Search Global Accounts*** if a broader review is required.
2. Add fields and columns that help identify the account codes to be reviewed.
3. Use *Master Chart Status* to locate account codes that do not match the Master Chart.
4. Click *Refresh* to display the records.

5. Review the results and use them to support account code updates.

Search Local Accounts and Search Global Accounts | Edit Account Codes

You can edit an account code for the local building directly from each of these search screens. This provides quick access to ***Account Maintenance***, allowing the account code description to be updated so it aligns with the Master Chart.

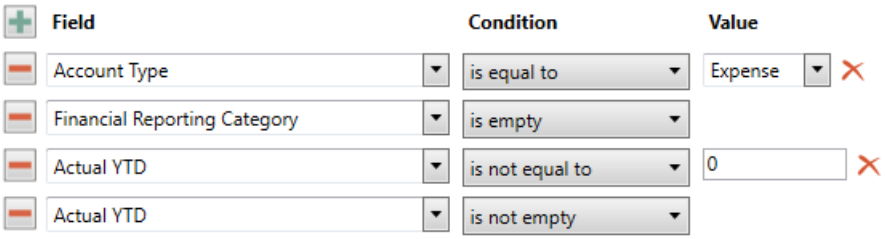
1. Follow the steps above to locate the account code to be edited.
2. Select the account code and click the *Edit* button.
3. Edit the *Description* field to match the Master Chart, and review any other account code setup fields if needed.
4. Click *Save*.



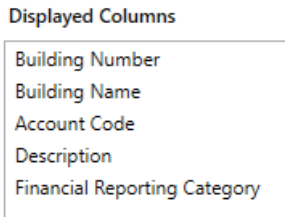
Identify expense account codes with a category

Some states are required to use additional reporting for financial data which is categorised in***Account Maintenance***. Using a search similar to this will identify any account codes that have not been categorised.

1. Search for or select ***Search Local Accounts*** or ***Search Global Accounts***.
2. Adjust the *Restrict To* tab to include:
    - Account Type is equal to Expense.
    - Financial Reporting Category is empty.
    - Actual YTD is not equal to 0.
    - Actual YTD is not Empty



3. Click *Columns* to add Account Code, Description and Financial Reporting Categoryto the displayed columns.



4. Click *Refresh* to display the records.
5. Click *Export* to export the results to an Excel report, if required.