Run Budgetary Org by Chartstring Report

UC Merced's employees may perform budget analysis using UCMPLAN reports, use these steps to run the Budgetary Org by Chartstring report.

Log in to the UCMPLAN through the company sign on using your UC Merced NetID credentials.

Navigation: Homepage >> Reports

System Steps:

1. Click the Reports tile.

   **Note:** Each users Springboard may have different tiles.

   The Reports page displays.

2. Expand the Home folder if it is not already expanded.

3. Click to expand the Financials folder.

Identify the report to run and select the format to open it in. For this activity, open the Budgetary Org by Chartstring report in HTML.
**Note:** Consider what type of report you may need to run in your job. Find the report that aligns with that reporting need.

4. Click **Budgetary Org by Chartstring**.

5. Click the **HTML** output button.

The **Budgetary Org by Chartstring** window pops-up.

6. Complete the dimension fields required by the report. Type the dimension or click the Member Selection icon to make changes.

7. Click **Continue**.

A pop-up window displays, change the **Budgetary Org** as required.

8. Click the **Go to Member Selection** search icon (magnifying glass.)
9. The Members selection window pops-up. Maximize this window to see all sections.

10. Click the checkbox of the members to include on the report.

11. Click the Right Arrow > to add the selected items for the report.

Note: To remove members from the selection, click the checkbox from the Name section on the left and click the Left Arrow <.

12. Select all the members from the Name selection to include on the report.
13. Click the **OK** button.

The parameters pop-up displays.

14. Click the **OK** button.

The **Budgetary Org by Chartstring** report displays in the requested format (HTML.)

15. Preview the output. Click the **dimensions hyperlink** at the top of the report to change if needed i.e. change the fiscal year. The report will refresh with the new dimensions.
16. Click the **HTML preview** drop-down menu to select one of the other formats to view the report. i.e. change the output to PDF or export to Excel.

17. Click **Close** when finished.