



UCMPLAN

Run Recurring Budget Detail Report

January 11, 2021

Final

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Run Recurring Budget Detail Report

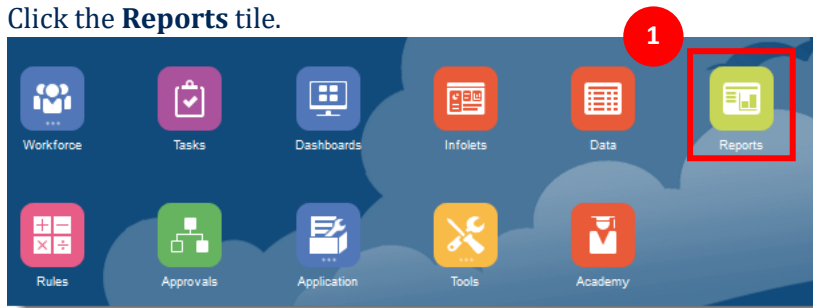
UC Merced's employees may perform budget analysis using UCMPPLAN reports, use these steps to run the Recurring Budget Detail report.

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

Navigation: **Homepage >> Reports**

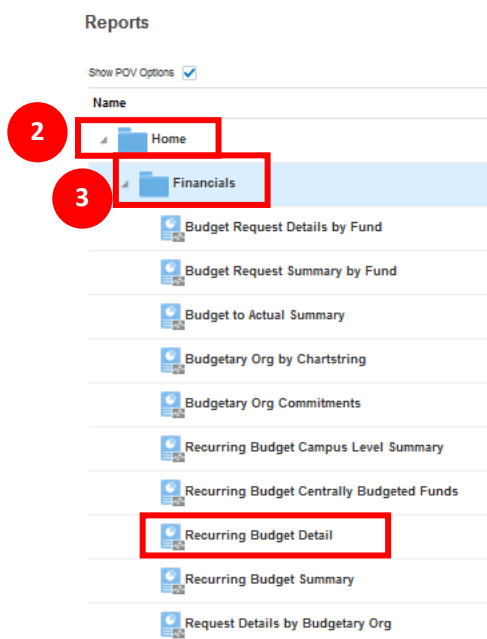
System Steps:

1. Click the **Reports** tile.



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 **Recurring Budget Detail** report in **HTML**.

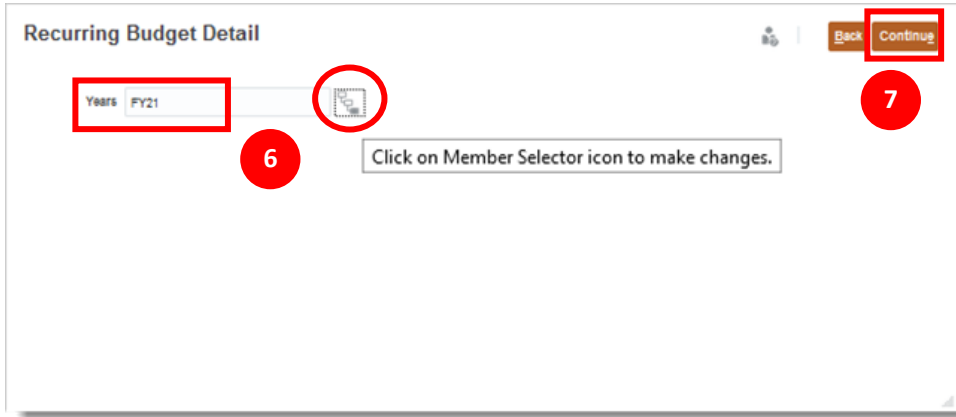
Note: Consider what type of report you may need to run in your job. Find the report that aligns with that reporting need.

4. Click **Recurring Budget Detail**
5. Click the **HTML** output button



The **Recurring Budget Detail** 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**.



The **Recurring Budget Details** report displays in the requested format (HTML.)

8. Preview the output. Click the **dimensions hyperlink** at the top of the report to change if needed. The report will refresh with the new dimensions.
9. 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.



10. Click **Close** when finished.



