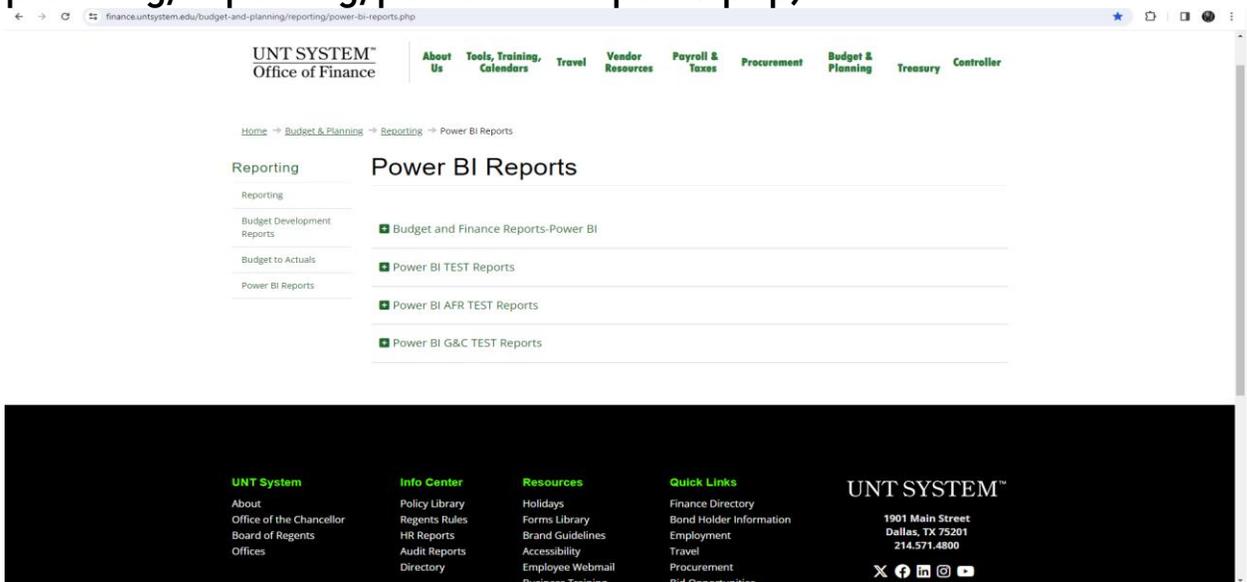
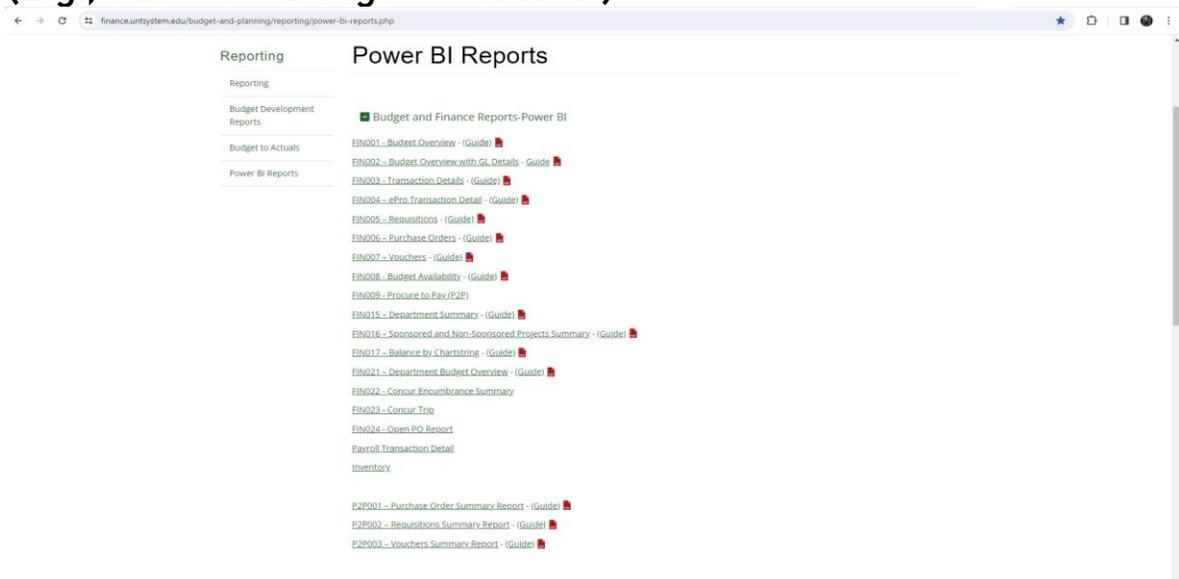


# How-To Run a Report via Budget & Planning Reporting Webpage

- Go to the reporting [webpage](https://finance.untsystem.edu/budget-and-planning/reporting/power-bi-reports.php) (https://finance.untsystem.edu/budget-and-planning/reporting/power-bi-reports.php)



- Click on the desired power BI report to open, PDF Report Guides are available for select reports, see the  icon. (E.g., FIN001 – Budget Overview)



- This will open up Power BI Service and the report filter page.

The screenshot shows a Power BI report titled "FIN001 - Budget Overview" within the Power BI Service interface. The report is displayed in a filtered view, showing a list of parameters to be selected. The parameters are organized into several sections:

- Business Unit:** A dropdown menu set to "All Business Units".
- Budget Period:** A dropdown menu set to "2023".
- Fiscal Accounting Period:** A dropdown menu.
- Department ID/Descr or Manager:** A search box with a list of departments including "100000 - Office of the President (Smarles, Neal...)", "100001 - Division of Planning (Rowe/Dobbie A.L.)", "100003 - Pres-Gen (Buchanan Stacy Lynn)", "100004 - Pres Events Management (Whitney/Ma...)", "100008 - State Emp Charitable Camp (Conroy...)", "100100 - Univ Integrity and Compliance (Sriniva...)", and "110000 - Provost-Gen (Everett Brand Lynn)".
- Department Choices:** A dropdown menu set to "S28000".
- Account Type:** Radio buttons for "Revenue" (checked) and "Expense".
- PK Group:** Radio buttons for "Budgetary" (checked), "Non-Budgetary", and "Non-Sponsored Projects".
- Department Tree Selections:** A section with "Department Tree Cascading - Prompts" and "Expandable Department Tree" options.
- Department Tree Selection Options:** A dropdown menu.
- Project ID/Descr or Manager:** A search box with a list of projects including "013127 - NIA Cunningham 03/17 ( )", "1000001 - Stadium (Smarles, Neal Joseph)", "1000001 - Shuttle Buses (Jackson Scott Calvin)", "1000004 - Chestnut Hall Projects (Wirth Elizabeth)", "1000005 - Auxiliary Sport Project Cdr (Ormand...)", "1000012 - Bruce Hall-IVAC (Ormand,Eorie Kristi...)", and "1000014 - Beckenmeier Hall Pse. Snd/Project/Promen...".
- Project Choices:** A dropdown menu.
- Ledger:** A dropdown menu set to "All".
- Project Status:** A dropdown menu set to "Exclude Inactive Project".
- Actuals View:** A dropdown menu set to "Actuals to Date".
- Zero Values:** A dropdown menu set to "Do not show values that sum to zero".
- Closing Adjustments:** A dropdown menu set to "Exclude Closing Adjustments".
- Balance View:** A dropdown menu set to "Show All".

At the bottom of the filter page, there are three buttons: "Finish", "PDF Export", and "Next >". A note at the bottom states: "\* Chartfield combination that sum to zero have been excluded from the report. To view that information, use the Transaction Detail Report."