



# ADDY NOTES



## Running a 5-Year Planning Report for Organizational Units and Academic/Business Units

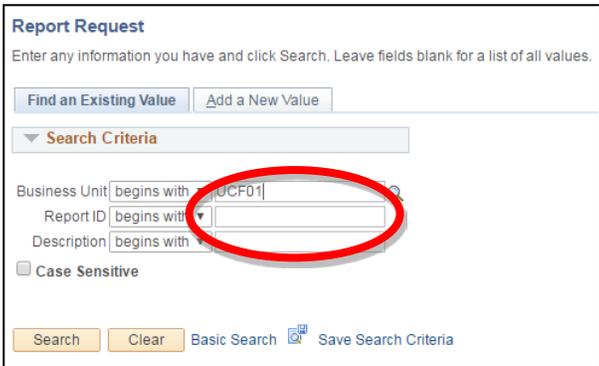
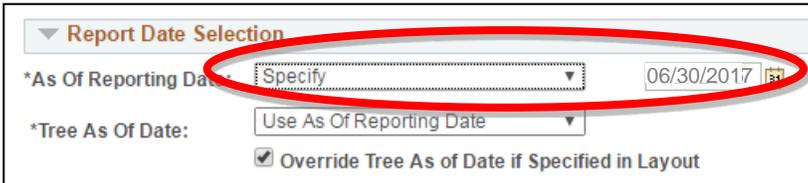
This Addy Note explains how to run a 5-Year Planning Report for an Organizational Unit or Academic/Business Unit with specified scopes within UCF Financials. You use the same report format to produce results for either level, and you specify a value in Step 2 below that will return results for the level in which you are interested.

Step	Action
1.	Navigate to: <b>Main Menu &gt; Reporting Tools &gt; PS/nVision &gt; Define Report Request.</b>
2.	<p>Determine the report name for the report you need to run. The report name follows the following structure:</p> <p style="text-align: center;"><b>###\$5_5Y</b></p> <ul style="list-style-type: none"> <li>• The #'s in the structure are placeholders for the Org Unit. An example would be COS for College of Science.</li> <li>• The \$ in the structure is a placeholder for the report structure. The options are either: <ul style="list-style-type: none"> <li>○ <b>O – For Org Unit level reports</b></li> <li>○ <b>B – For Academic Business Unit level reports</b></li> </ul> </li> </ul> <p><b>Org Unit example:</b> College of Science, Org Unit, 5 Year <b>Report ID</b> is: COSO5_5Y</p> <p><b>Academic Business Unit example:</b> College of Science, Academic Business Unit, 5 Year <b>Report ID</b> is: COSB5_5Y</p>



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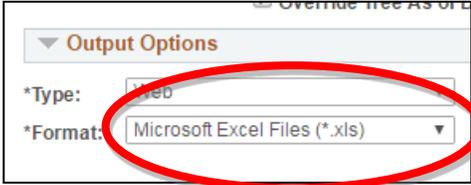
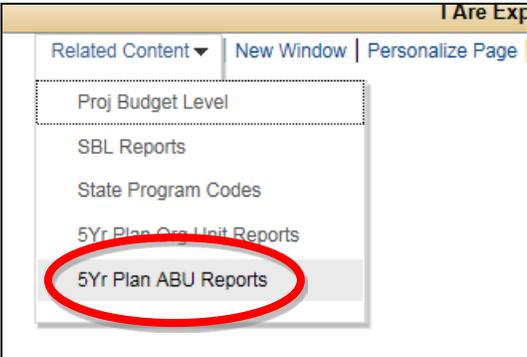


Step	Action
3.	<p>Enter the <b>Report ID</b> in the search field.</p> 
4.	<p>Click <b>Search</b>.</p> 
5.	<p>Select <b>Specify</b> from the <b>As of Reporting Date</b> drop-down list. Enter the end date for the current fiscal year. For example, the end date for fiscal year 2017 is June 30, 2017.</p> 
6.	<p>Verify that the <b>Tree As Of Date</b> field defaults to <b>Use As Of Reporting Date</b>. If it has not defaulted, select it.</p> 



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7.	<p>Verify that <b>Web</b> defaults in the <b>Type</b> field and <b>Microsoft Excel Files (*.xls)</b> defaults in the <b>Format</b> field.</p> 
8.	<p>Click the <b>Related Content</b> link on the top right corner of the page and select the link for the report level you are running; either <b>5Yr Plan Org Unit Reports</b> if you are running the Org Unit report, or <b>5Yr Plan ABU Reports</b> if you are running the report at the Academic/Business Unit level. In our example, we select the <b>5Yr Plan ABU Reports</b>. <b>Caution: You MUST ensure that you select the related content that matches the report level you are running, either Org Unit or Academic/Business Unit.</b></p> 



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Step	Action
9.	<p>Enter the <b>Report Scope</b> then click <b>View Results</b>. In this example, we enter <b>COS%</b>. Including the % symbol in the search ensures the related content that you are requesting will display all of the available scopes that have been defined for the College of Science. The available report scopes for this level will display in the grid at the bottom of the page.</p> <div data-bbox="306 688 1138 884" style="border: 1px solid black; padding: 5px;"> <p> <span>Related Content</span> <span>5Yr Plan ABU Reports</span> <span>5Yr Plan Org Unit Reports</span> </p> <p><b>FXGL_RC_BU_5YR_PLAN_REPORTS - Academic Business Unit</b></p> <p>Scope: <input type="text" value="cos%"/> <span style="border: 2px solid red; border-radius: 50%; padding: 2px;">View Results</span></p> </div>



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10.	<p>Use the chart below to identify the codes for the <b>Budget Entity Scopes</b> for the report you want to run. In a following step you will need to know which report scope value will produce the reports for the budget entity you wish to report on, or alternatively, whether you want to produce a report that will be the sum of the all budget entities for the Org Unit or Academic/Business Unit. Use the following chart to identify how you will be able to recognize the correct scope value.</p> <table border="1" data-bbox="310 726 1084 1591"> <thead> <tr> <th data-bbox="310 726 716 779">Budget Entity Scope Code</th> <th data-bbox="716 726 1084 779">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="310 779 716 852">AUX</td> <td data-bbox="716 779 1084 852">Auxiliary</td> </tr> <tr> <td data-bbox="310 852 716 957">BU</td> <td data-bbox="716 852 1084 957">All Budget Entities – Org Unit Reports Only</td> </tr> <tr> <td data-bbox="310 957 716 1020">CNF</td> <td data-bbox="716 957 1084 1020">Concession</td> </tr> <tr> <td data-bbox="310 1020 716 1083">E&amp;G</td> <td data-bbox="716 1020 1084 1083">Education &amp; General</td> </tr> <tr> <td data-bbox="310 1083 716 1146">C&amp;G</td> <td data-bbox="716 1083 1084 1146">Contracts &amp; Grants</td> </tr> <tr> <td data-bbox="310 1146 716 1209">ICA</td> <td data-bbox="716 1146 1084 1209">Intercollegiate Athletics</td> </tr> <tr> <td data-bbox="310 1209 716 1272">SFA</td> <td data-bbox="716 1209 1084 1272">Student Financial Aid</td> </tr> <tr> <td data-bbox="310 1272 716 1409">SPSTDBU</td> <td data-bbox="716 1272 1084 1409">All Budget Entities – Academic Business Unit Reports Only</td> </tr> <tr> <td data-bbox="310 1409 716 1472">STA</td> <td data-bbox="716 1409 1084 1472">Student Activities</td> </tr> <tr> <td data-bbox="310 1472 716 1535">THA</td> <td data-bbox="716 1472 1084 1535">Teaching Hospitals</td> </tr> <tr> <td data-bbox="310 1535 716 1591">THF</td> <td data-bbox="716 1535 1084 1591">Tech Fee</td> </tr> </tbody> </table> <p>In order to select the correct report, please take note of the code for the <b>Budget Entity Scope</b> so you can select the correct report in <b>Step 11</b>. For this example, we will be taking note of the code AUX for the <b>Budget Entity Scope Code</b>.</p>	Budget Entity Scope Code	Description	AUX	Auxiliary	BU	All Budget Entities – Org Unit Reports Only	CNF	Concession	E&G	Education & General	C&G	Contracts & Grants	ICA	Intercollegiate Athletics	SFA	Student Financial Aid	SPSTDBU	All Budget Entities – Academic Business Unit Reports Only	STA	Student Activities	THA	Teaching Hospitals	THF	Tech Fee
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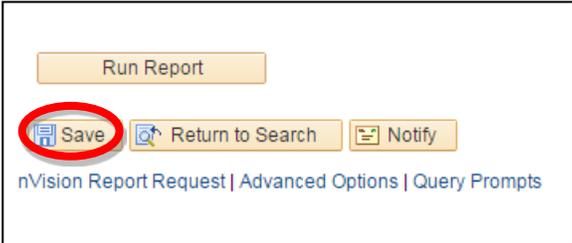
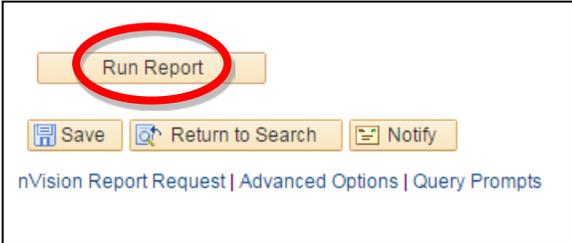
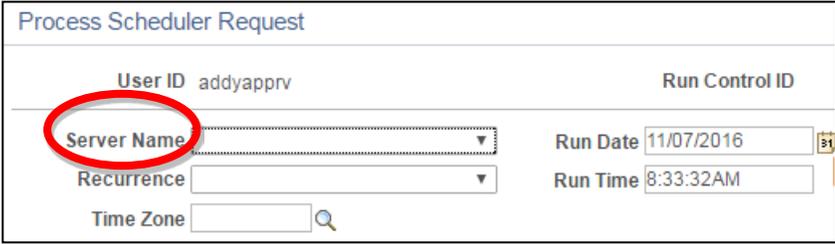


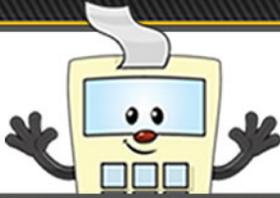
Step	Action																												
<p><b>11.</b></p>	<p>Copy the <b>Scope</b> for the report you would like to run, then click <b>Scope and Delivery Templates</b>.</p> <div data-bbox="305 569 1312 926"> <table border="1"> <thead> <tr> <th></th> <th>Business Unit</th> <th>Report Scope</th> <th></th> </tr> </thead> <tbody> <tr> <td>1</td> <td>UCF01</td> <td>COS_ANTAUX</td> <td>Auxiliary</td> </tr> <tr> <td>2</td> <td>UCF01</td> <td>COS_ANTFSG</td> <td>Education &amp; General</td> </tr> <tr> <td>3</td> <td>UCF01</td> <td>COS_ANTSFA</td> <td>Student Financial Aid</td> </tr> <tr> <td>4</td> <td>UCF01</td> <td>COS_ANT_BU</td> <td>Anthropology</td> </tr> <tr> <td>5</td> <td>UCF01</td> <td>COS_ARBE&amp;G</td> <td>Education &amp; General</td> </tr> <tr> <td>6</td> <td>UCF01</td> <td>COS_ARB_BU</td> <td>Arboretum</td> </tr> </tbody> </table> </div> <p>In the screen shot of the related content above, if you select the scope values for the academic/business units (for example, <b>COS_ANT_BU</b> for the Anthropology academic/business unit) the resulting report will return the sum of all budget entities that are defined for that level.</p> <p><b>Note:</b> For example in determining the SBL abbreviations for each Academic Business Units, please utilize the SBL tree. Each Org Unit can be drilled down on to determine the Academic Business units underneath it, and the abbreviation. For assistance in utilizing the SBL tree, please refer to steps 1-5 of the <a href="#">Using the Tree Viewer in the Standard Budget Ledger</a> Addy Note.</p>		Business Unit	Report Scope		1	UCF01	COS_ANTAUX	Auxiliary	2	UCF01	COS_ANTFSG	Education & General	3	UCF01	COS_ANTSFA	Student Financial Aid	4	UCF01	COS_ANT_BU	Anthropology	5	UCF01	COS_ARBE&G	Education & General	6	UCF01	COS_ARB_BU	Arboretum
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<p><b>12.</b></p>	<p>Paste the <b>Scope</b> you copied into the <b>Report Scope</b> field.</p> <div data-bbox="305 1423 1019 1661"> <p>nVision Web Output</p> <p>Business Unit: UCF01 Report ID: COS05_5Y</p> <p>Report scope: COS_ANTAUX Enter your report scope. Scope Definition</p> </div>																												



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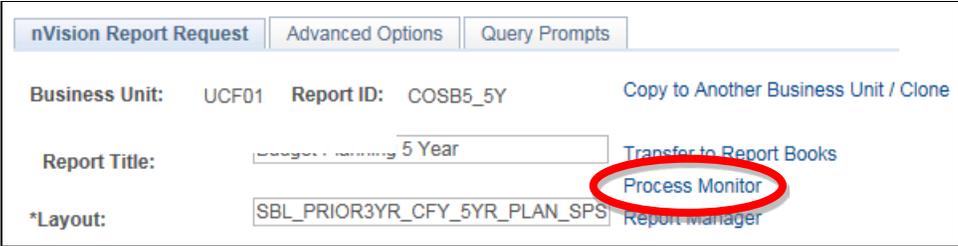
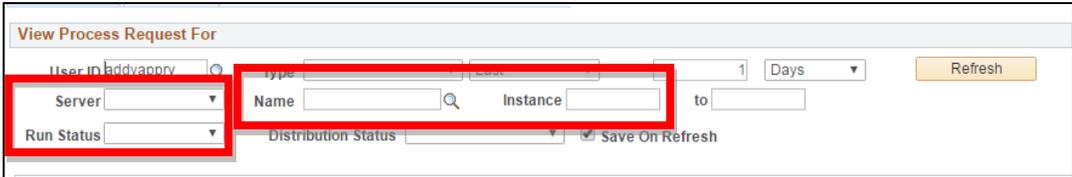
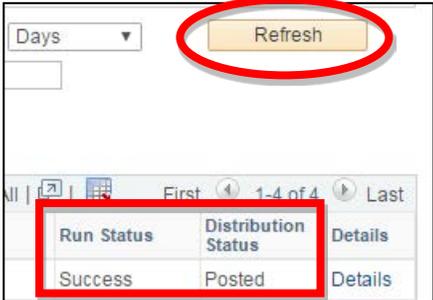


Step	Action
13.	<p>Click <b>OK</b>.</p> 
14.	<p>Click <b>Save</b>.</p> 
15.	<p>Click <b>Run Report</b>.</p> 
16.	<p>Verify that the <b>Server Name</b> field is blank.</p> 



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Step	Action
17.	<p>Click <b>OK</b>.</p> 
18.	<p>Click the <b>Process Monitor</b> link.</p> 
19.	<p>Verify that the <b>Server</b>, <b>Run Status</b>, <b>Type</b>, <b>Name</b>, and <b>Instance</b> fields are blank.</p> 
20.	<p>Click <b>Refresh</b> until the <b>Run Status</b> changes to <b>Success</b> and the <b>Distribution Status</b> changes to <b>Posted</b>.</p>  <p><b>Note:</b> If the <b>Run Status</b> displays <b>Error</b>, click the <b>Details</b> link and then the <b>Message Log</b> link to view the problem.</p>
21.	<p>Navigate to the <b>Report Manager</b> to retrieve and view the report.</p>