

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: Main Menu > Reporting Tools > PS/nVision > Define Report Request.
2.	Determine the report name for the report you need to run. The report name follows the following structure: ###\$5_5Y
	• The #'s in the structure are placeholders for the Org Unit. An example would be COS for College of Science.
	 The \$ in the structure is a placeholder for the report structure. The options are either: O – For Org Unit level reports
	 B – For Academic Business Unit level reports
	Org Unit example: College of Science, Org Unit, 5 Year Report ID is: COSO5_5Y
	Academic Business Unit example: College of Science, Academic Business Unit, 5 Year Report ID is: COSB5_5Y



Step	Action
3.	Enter the Report ID in the search field.
	Report Request Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value Add a New Value Search Criteria
	Business Unit begins with an UCF01 Report ID begins with Degins wi
	Search Clear Basic Search 🖾 Save Search Criteria
4.	Click Search.
	Clear Basic Search 🖉 Save Search Criteria
5.	Select Specify from the As of Reporting Date 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.
	Report Date Selection
	*As Of Reporting Data Specify O6/30/2017
	*Tree As Of Date: Use As Of Reporting Date ▼
	Marifa that the True As Of Date field definite to Her As Of Demanting Date If it has
6.	not defaulted, select it.
	Report Date Selection
	*As Of Reporting Date: Indané Pale
	*Tree As Of Date: Use As Of Reporting Date Override Tree As of Date if Specified in Layout

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Step	Action
7.	Verify that Web defaults in the Type field and Microsoft Excel Files (*.xls) defaults in the Format field.
	✓ Output Options *Type: *Format: Microsoft Excel Files (*.xls)
8.	Click the Related Content link on the to right corner of the page and select the link for the report level you are running; either 5Yr Plan Org Unit Reports if you are running the Org Unit report, or 5Yr Plan ABU Reports if you are running the report at the Academic/Business Unit level. In our example, we select the 5Yr Plan ABU Reports . 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 .
	I Are Exp
	Related Content - New Window Personalize Page
	Proj Budget Level
	SBL Reports
	State Program Codes
	5Yr Plan Org Unit Reports
	5Yr Plan ABU Reports



Step	Action			
9.	Enter the Report Scope then click View Results . In this example, we enter COS% . 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 a the bottom of the page.			
	Related Content	5Yr Plan ABU Reports	5Yr Plan Org Unit Reports	
	FXGL_RC_BU_5YR_PLA	N_REPORTS - Academic	Business Unit	

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)	Action		
.0.	Use the chart below to identify you want to run. In a following will produce the reports for the whether you want to produce a the Org Unit or Academic/Busi will be able to recognize the co	the codes for the Budget Ent step you will need to know w budget entity you wish to rep report that will be the sum of ness Unit. Use the following rrect scope value.	ity Scopes for the report which report scope value ort on, or alternatively, the all budget entities for chart to identify how you
	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	
	In order to select the correct rep Scope so you can select the corr taking note of the code AUX for	port, please take note of the correct report in Step 11 . For the Budget Entity Scope C	ode for the Budget Entity is example, we will be code.

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FXGL_R Scope CC	C_BU_5YR_PLAN_REPOR		Related Content 5Yr Plan ABU Reports 5Yr Plan Org Unit Reports Proj Budget Level SBL Reports State Program Codes				
Scope CC		₹TS - Academic Business Unit					
View Dog	S%						
view rtes	ults						
Download	results in : Excel SpreadSheet	CSV Text File XML File (4 kb)					
View All							
1	Business Unit	Report Scope	De				
2	UCF01		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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Step	Action
13.	Click OK .
	OK Cancel
14.	Click Save.
	Run Report Image: Save model Image: Save model
15.	Click Run Report .
	Run Report
16.	Verify that the Server Name field is blank.
	Process Scheduler Request
	User ID addyapprv Run Control ID
	Server Name Run Date 11/07/2016
	Recurrence Run Time 8:33:32AM Time Zone



Step	Action
17.	Click OK .
	OK Cancel
18.	Click the Process Monitor link.
	nVision Report Request Advanced Options Query Prompts
	Business Unit: UCF01 Report ID: COSB5_5Y Copy to Another Business Unit / Clone
	Report Title: 5 Year Transfer to Report Books
	*Layout: SBL_PRIOR3YR_CFY_5YR_PLAN_SPS Report Wanager
19.	Verify that the Server , Run Status , Type , Name , and Instance fields are blank.
	User In addyappry O Type 1 Case 1 Days T Refresh
	Server Run Status
20.	Click Refresh until the Run Status changes to Success and the Distribution Status
	changes to Posted .
	Days V Refresh
	NI 🔁 📑 First 🕙 1-4 of 4 🕑 Last
	Run Status Distribution Status Details
	Success Posted Details
	Note: If the Run Status displays Error, click the Details link and then the Message
	Log link to view the problem.
21.	Navigate to the Report Manager to retrieve and view the report.