



Standard Budget Ledger Reports: Budget Planning

This Addy Note details the process to run the Budget Planning report within UCF Financials.

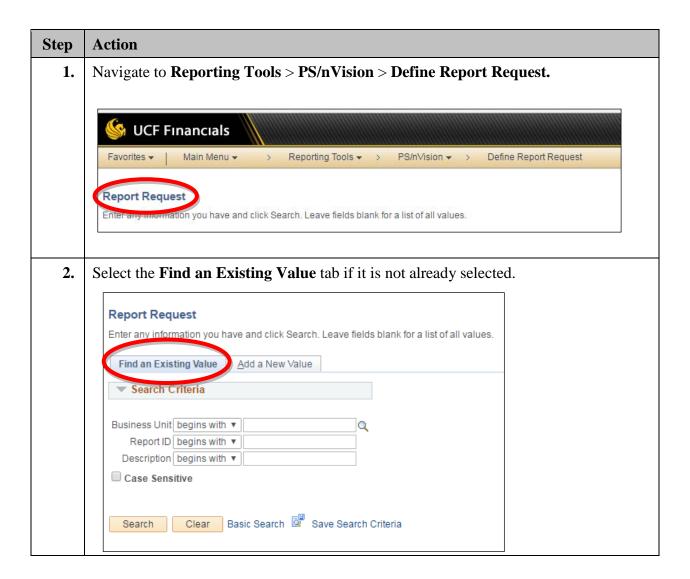
Before you begin, be sure you know the following:

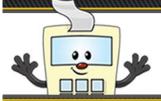
- Which level you will be running your report at (Division, Org Unit, Department, etc.)
- Whether your area has been budgeted monthly or quarterly

Report Name	Hierarchy Level	Report Details
Budget Planning (3 or 5 Year)	Division	Displays budget planning expenses for a division — reported cumulatively
	Organizational Unit	Displays budget planning expenses for an entire organizational unit – reported cumulatively
	Academic/Business Unit	Displays budget planning expenses for an entire academic or business unit – reported cumulatively
	Functional Group	Displays budget planning expenses for a collection of departments that have been grouped by function – reported cumulatively
	Department	Displays budget planning expenses for a given department number

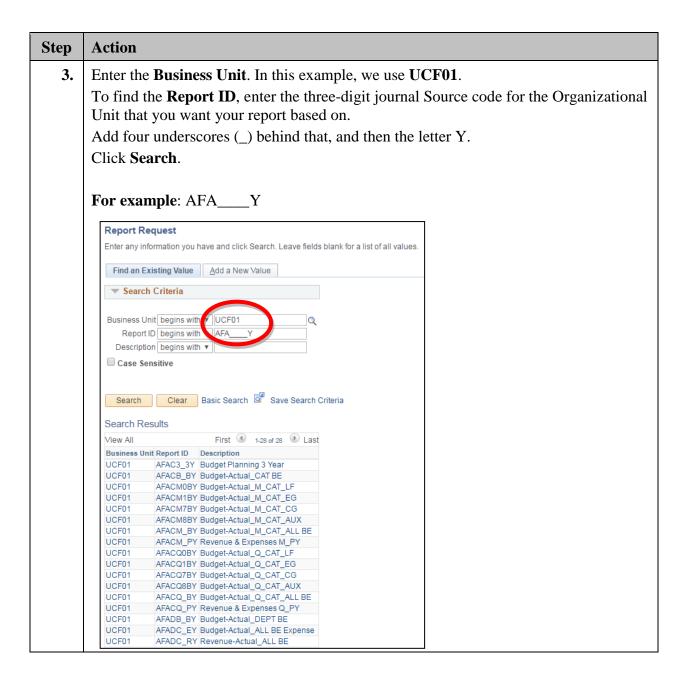


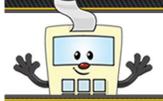




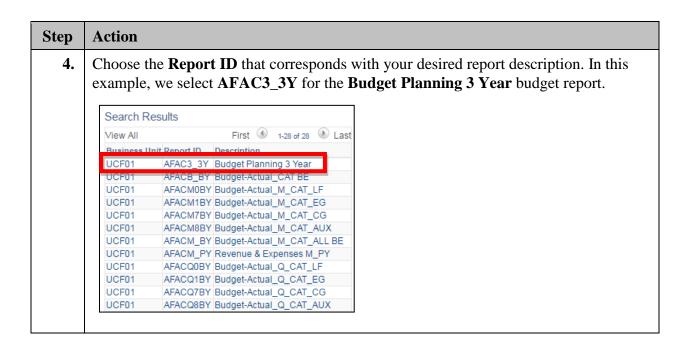
















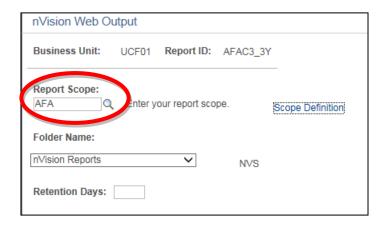
On the nVision Report Request tab, click the Scope and Delivery Templates link. 5. nVision Report Request Advanced Options | Query Prompts Copy to Another Business Unit / Clone **Business Unit:** UCF01 Report ID: AFAC3_3Y Budget Planning 3 Year Transfer to Report Books Report Title: Process Monitor SBL_DEPT_CAT_BUDGET_3YR_PLAN Report Manager *Layout: **▼** Report Date Selection Today's Date *As Of Reporting Date: Use As Of Reporting Date *Tree As Of Date: ✓ Override Tree As of Date if Specified in Layout **▼** Output Options Scope and Delivery Templates Web *Type: Microsoft Excel Files (*.xls) *Format: Run Report Add Dipdate/Display Save Return to Search Motify nVision Report Request | Advanced Options | Query Prompts





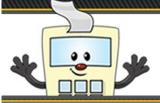
6. In the **Report Scope** field, review the default value. This field determines which level of the SBL hierarchy your report will display. If the default value does not correspond to the level you wish, click the Look-up button (magnifying glass icon), next to the **Report Scope** field, to search for and select the appropriate value.

In this example, we use **AFA** to run the report at the Organizational Unit level.



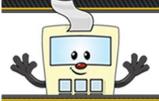
Click OK.

Note: If you would like to run the report based on a specific department, enter **D**, followed by the eight-digit department number, followed by **S** into the **Report Scope** field. Example: **D24140001S**



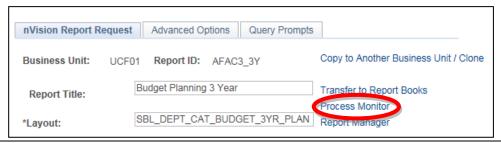


7. Click Save, and then Run Report. nVision Report Request | Advanced Options | Query Prompts Copy to Another Business Unit / Clone **Business Unit:** Report ID: AFAC3_3Y Budget Planning 3 Year Transfer to Report Books Report Title: Process Monitor SBL_DEPT_CAT_BUDGET_3YR_PLAN Report Manager *Layout: **▼** Report Date Selection Today's Date *As Of Reporting Date: Use As Of Reporting Date *Tree As Of Date: ✓ Override Tree As of Date if Specified in Layout **▼** Output Options Scope and Delivery Templates *Type: Microsoft Excel Files (*.xls) *Format: Run Report Return to Search Add Dipdate/Display nVision Report Request LAdvanced Options | Query Prompts When the **Process Scheduler Request** page displays, click **OK**. You will return to the previous screen. 8. Observe that the system has generated a **Process Instance** number. Output Options Scope and Delivery Templates Web ~ Microsoft Excel Files (*.xls) *Format: rocess Instance:811269 Run Report

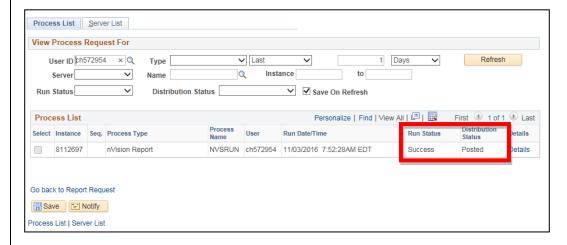




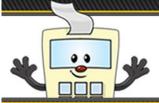
9. Click the **Process Monitor** link.



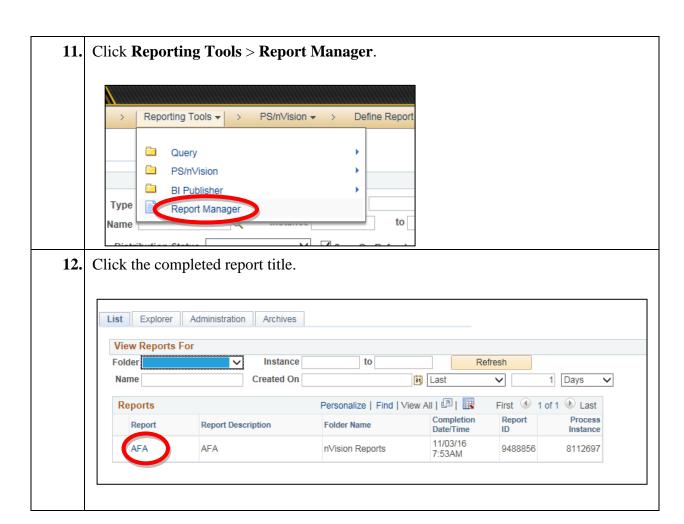
10. Click **Refresh** until the **Run Status** and **Distribution Status** fields display **Success** and **Posted**, respectively. When your **Run Status** is **Success** and the **Distribution Status** is **Posted**, this means that your report is ready.



Note: If the **Run Status** is **Error**, determine the reason. Contact the Financials Service Desk at (407) 823-5117, option 6, if necessary.



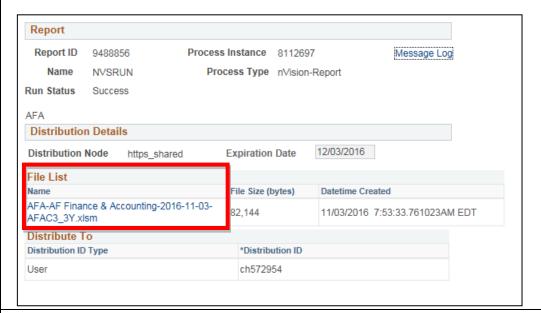




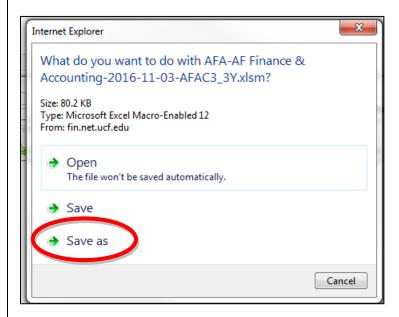


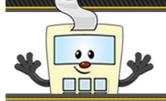


13. Under the File List, click the name of your report.



14. In the window, choose **Save as**, and save the report to your desktop or another safe location.

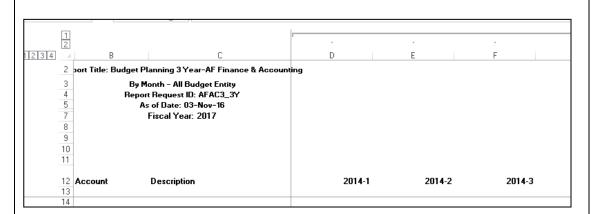






- **15.** From your saved location, open the report.
- 16. The Budget Planning 3 Year report displays, showing Account and Description in the rows. The columns list Prior Year Fiscal Year 2013, Prior Fiscal Year 2014, Prior Fiscal Year 2015, Prior Three Fiscal Years, Current Fiscal Year Final Budget, Current Fiscal Year to Date, Forecast Expenses, Total Forecast Expenses, Variance, 2017 DRAFT BUDGET, 3 Years Plan 2018 DRAFT BUDGET, and 2019 DRAFT BUDGET.

For example:



The report header displays the **Report Title**, **Report ID**, **Run Date**, and **Fiscal Year**.