

Anaplan Reporting App

General Purpose:

The Reporting App provides Budget and Actual financial reporting at the operating unit and departmental levels. These reports will enhance and ultimately replace the nVision reports that the Budget Office currently provides each month.

Overview of Reports:

1.01 - Current Year Report

This report contains the following information:

- 1) Current year-to-date budget and actuals for any period within the current fiscal year.
- 2) Prior year-to-date actuals and prior year end actuals for point in time comparisons.
- 3) Budget to Actual percentages and percentage/dollar change in actuals for any period within the current fiscal year.
- 4) Fund Balance totals for current and prior year point-in-time as well as prior year end.

1.02 - 3 Year History Report

This report contains the following information:

- 1) Current year-to-date budget and actual data
- 2) Three years of historical budget and actual data
- 3) Current and historical Fund Balance data

1.03 - Departmental Current Year Report (All Access)

This report mirrors the Current Year Report (1.01) but with the added ability to view budget/actual data at the departmental level.

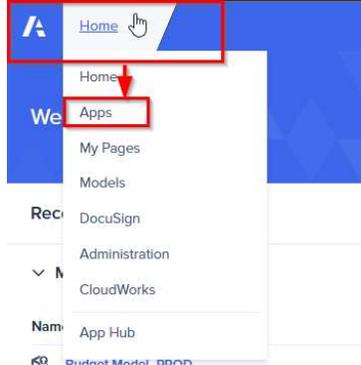
Timing of Updates:

These reports contain real-time data that is updated nightly similar to the Finance Intranet. Units will be able to access and view these pages at any time throughout the year.

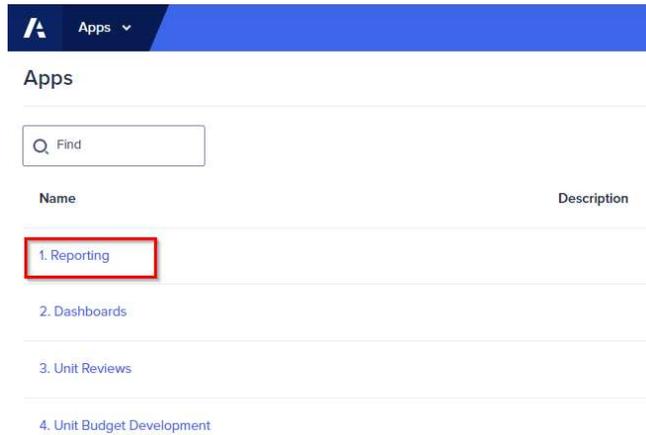
Process for Viewing Reporting Pages:

1. Navigating to Apps Home Page:

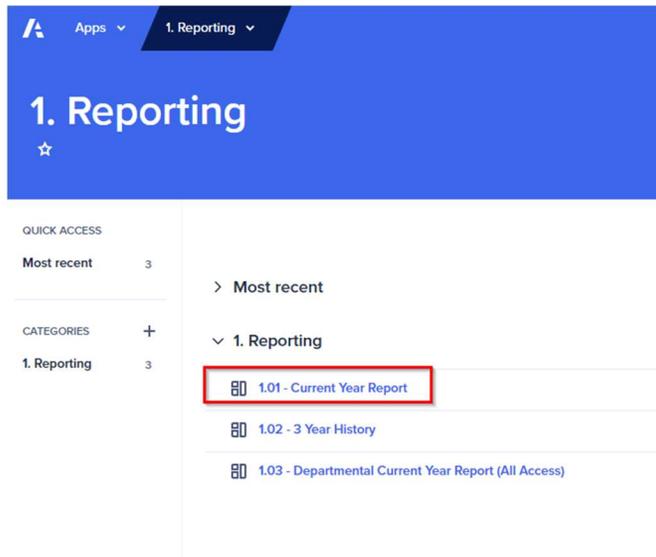
- Once logged into Anaplan, use the dropdown list at the top left of the screen to navigate to the Apps Home Page.



2. From the Apps home page, select the Reporting link:

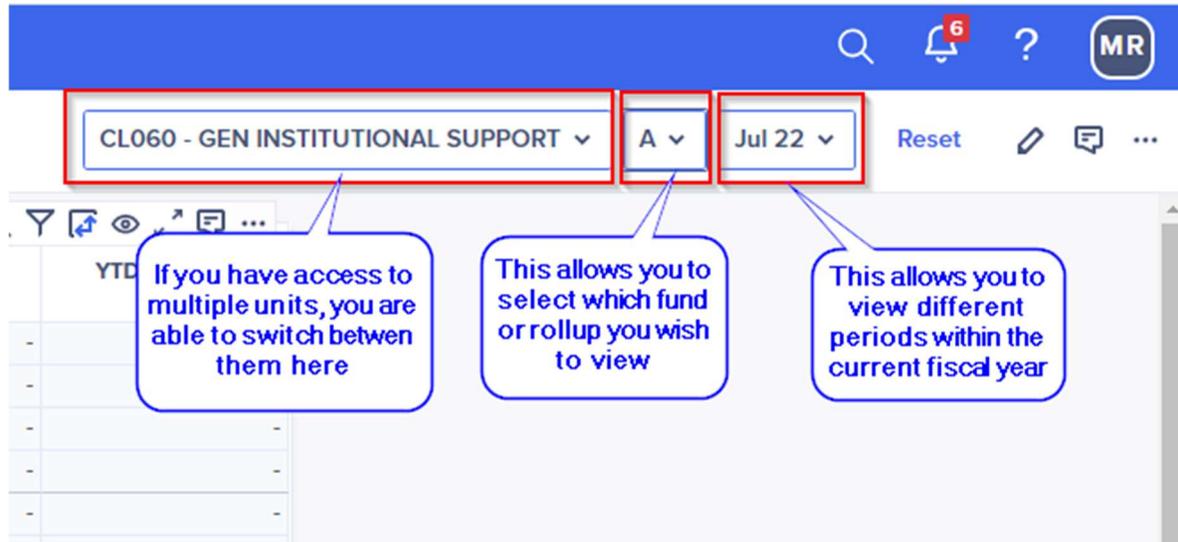


3. Once you are within the Reporting App, you will be able to select which report you would like to view from the list. In this example, we will begin by selecting the 1.01 – Current Year Report.

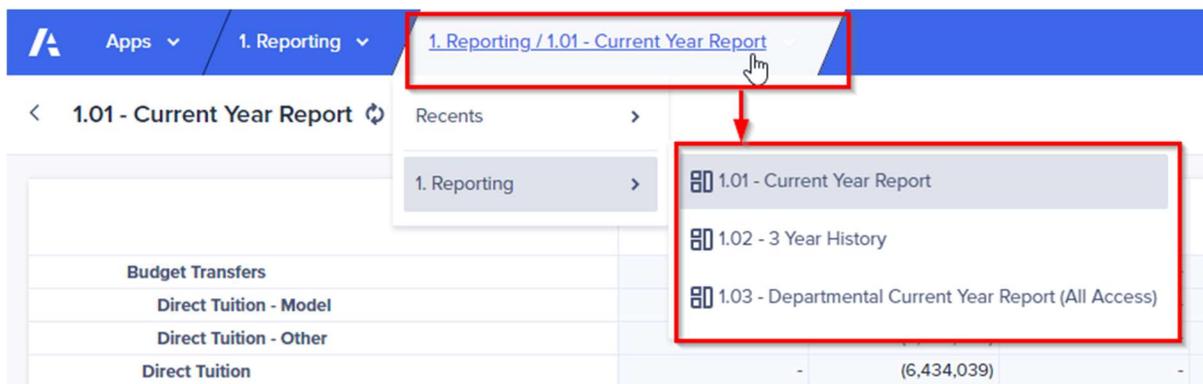


4. Within this report, there are three selectors in the top right-hand corner which can be used to manipulate the report:

- Unit Selector: contains all operating units that the user will have access to
- Fund Selector: allows users to toggle between fund types or fund roll-ups (e.g., all Unrestricted fund types)
- Period Selector: used to view certain periods within the current fiscal year.



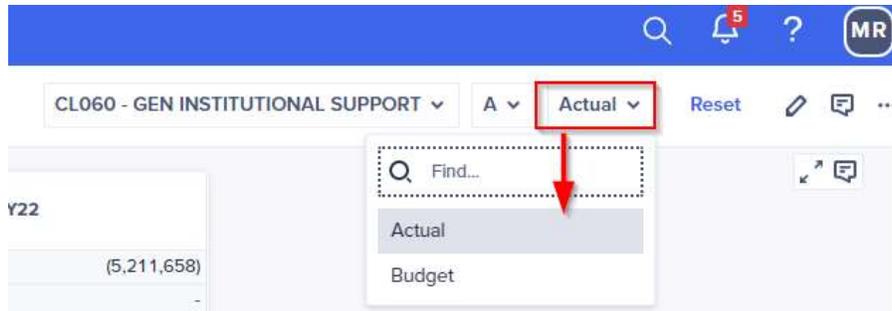
5. To navigate between reports, you can either repeat steps 1 - 3 or you can use the drop-down navigation at the top left of the screen.



- 6. Navigating to page 1.02 – 3 Year History report will allow you to view three years of historical data as well as year-to-date information for the current fiscal year.

	FY20	FY21	FY22	FY23
Budget Transfers	49,099,125	(10,128,054)	(5,674,453)	
Direct Tuition - Model	-	-	-	-
Direct Tuition - Other	(4,660,584)	(6,482,124)	(6,434,039)	
Direct Tuition	(4,660,584)	(6,482,124)	(6,434,039)	
Undergraduate Tuition - Resident	-	-	-	-
Undergraduate Tuition - Non-Resident	-	-	-	-
Graduate	-	-	-	-
Total Tuition	(4,660,584)	(6,482,124)	(6,434,039)	

As this report shows full fiscal year information, you will see that the Period selector has been replaced with a selector to toggle between budget and actual data.



- 7. Navigating to the 1.03 – Departmental Current Year Report (All Access), will allow you to view the Current Year Report at the departmental level.

Note: Instructions on how to manipulate this report page will also be available in the top left-hand corner of the report page.

Instructions

Use the report selection drop-downs to update the report.

- (1) Period - required field.
- (2) Fund Types - can be left empty to show Total Funds. Users have options to view different fund type levels. Only one fund type field should be populated.
- (3) Unit - can be left empty to show Total USC.
- (4) Dept - dependent on unit selection. Unit must be populated.

To REMOVE selections, click the "x" on the right of each field.

Report Selections

Period: Jul 22

Fund Type L2: Find...

	PY YTD Actuals	PY Year End	CY Budget
Budget Transfers	-	-	

8. There are six selectors on this page which can be used to update the data presented:

- a) Period Selector: used to view certain periods within the current fiscal year
- b) Unit Selector: contains all operating units
- c) Department Selector: allows users to view specific department information. (Note: By selecting no department, the report will display data at the unit level).

PY Year End	CY Budget	CY YTD Actuals	% Budget to Actual
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-

The remaining selectors allow users to view data at varying fund levels:

- d) Fund Type L2 Selector: allows users to view either Current Unrestricted or Restricted funds
- e) Fund Type L3 Selector: allows users to view A funds, Other Unrestricted, or Current Restricted funds
- f) Fund Type Selector: allows users to view a specific fund type

Note: Only one of the three fund type selectors should be active at once. By making no selection, the report will display Total Current Funds by default. To REMOVE selections, click the “x” on the right of each field.

Frequently Asked Questions

1) **Q:** Why do inactive departments appear within 1.03 - Departmental Current Year Report (All Access)?

A: Inactive departments will appear in the drop-down option if there has been budget or actual activity within the past three years.

2) **Q:** When accessing the 1.03 - Departmental Current Year Report (All Access) page, the selectors never go back to default. Is this intended?

A: Due to the dynamic nature of this report, Anaplan will “remember” the last selections made for each user. This feature will allow users who monitor the same department/fund combinations to have quick access to the data.