Overview: CalPlanning Reporting Guide

CalPlanning includes two reporting modules to support our campus finance community in creating and revising their unit’s financial plans. They include:

- **CalRptg**: Cal Reporting provides pre-defined templates with access to plan data and historical actuals and reports on the complete BFS Chart of Accounts (COA), CF2, Program Code or Time Series members.
- **HCPRptg**: Human Capital Planning Reporting provides pre-defined reporting templates to view Human Capital Planning (HCP) compensation plan data for future year Operating Budgets, in year Forecasts and Actuals.

Planner access in CalPlanning automatically includes both CalRptg with global read only access and HCPRptg with unit specific read only access. Reporting Only access in CalPlanning offers the option to have both CalRptg and HCPRptg or only CalRptg to allow for flexibility of roles within each unit’s budgeting process.

Additionally, the CalPlan financial planning module offers Planners real time reporting solutions to instantly view reports with plan data edits during the planning process. Note that CalPlan only stores current year plus two prior years of actual data, reports on the subset of CalPlan COAs and does NOT contain CF2, Program Code or Time Series members.

To support both the Planner and Reporting only roles, reports in CalPlan (R prefix) and CalRptg (CR prefix) are numbered to align reports between the two tools and to group similar types of reports together. The first digit in the report # indicates which type of report:

- 1 = SRECNA
- 2 = DeptID (L7) Level
- 3 = Entity Level
- 4 = Budget
- 5 = Transfers and Fund
- 6 = Trend
- 7 = Chartfield 1
- 9 = Recharge

CalPlanning plan data is pushed 5 times a day, in the first 15 minutes of the hour starting at 9:00am and then every three hours until 9:00pm. It is recommended that you do not run CalPlanning reports (CalPlan, CalRptg, HCPRptg and Smart View) for the first 15 minutes of the push hours to avoid an incomplete refresh of your data.

The following tables list the report number, name and description for CalRptg, CalPlan and HCPRptg reports.
CalRptg Reports

CalRptg reports have a CR prefix and are available to finance members with the Reporting Only and Planner roles in CalPlanning. Data access within CalRptg is campus wide read only. The CalRptg reports are accessed from the Workspace toolbar by clicking **Explore:/CalPlanning/CalRptg.**

**NOTE:** The CR011 Entity Summary Multi-Year report has been deleted and replaced by CR302.
**CalPlan Reports**

CalPlan reports have an R prefix and are available to finance members with the Planner role in CalPlanning. Data access within CalRptg is unit specific read only. The CalPlan reports are accessible from the Workspace toolbar by clicking **Explore: /CalPlanning /CalPlan**.
HCPRptg Report

HCPRptg reports have a HCP prefix and are available to finance members with the Planner role. Data access within HCPRptg is unit specific read only. The HCPRptg reports are accessed from the Workspace toolbar by clicking *Explore: /CalPlanning/HCPRptg.*