Budget Process Tools: CalPlanning Reporting
FY2018-19

FY2018-19 Budget Process Tool Training & Roles

2 CalPlanning Roles
- CalRptg & HCPRptg Reporters run and analyze financial reports
- Planners create and analyze budgets and run financial reports

Budget Process Tool Trainings
New Reporters (4) & Planners (6)
- Budget Process Tools: Introduction to CalPlanning
- Budget Cycle Tools: Introduction to CalPlanning Reporting
- Budget Process Tools: Creating a Unit Plan Navigating CalPlan
- Budget Cycle Tools: Creating a Compensation Plan Navigating Human Capital Planning (HCP)
- Smart View Ad Hoc Basics 1 & 2

Getting Started Guide
CalPlanning Getting Started Guide for new Planners, CalRptg & HCPRptg Reporters

Recommended classes for CalRptg and HCPRptg Reporters
Training Material Overview

Any content featuring this calendar reflects dates/timing from last year’s budget process FY2017-18. Updates for FY2018-19 Budget Process will be provided as soon as available, ETA January 2018

Classroom Handouts

- Budget Process Tools: CalPlanning Reporting Exercise Guide
- CalPlanning Reporting Guide Job Aid

On-Line

- Budget Process Tools: CalPlanning Reporting Presentation
- FY2018-19 Budget Process High Level Timeline Job Aid -TBD
- Training Evaluation
- Additional CalPlanning Job Aids and Materials

Learning Objectives

This course is designed for both new CalPlanning Planners and Reporting only finance members.

At the end of this training session you will be able to:

- Define the CalRptg reporting tool and key concepts
- Identify and navigate the steps to create, save, print and export CalRptg reports
- Run and access key FY2018-19 Budget Process reports
  - CR103, SRECNA Medium
  - CR120, SRECNA Trend
  - CR603, Year to Date Comparison
  - CR301, Entity Summary by Entity Selection
- Review recommended CalRptg resources and job aids to assist in the FY2018-19 Budget Cycle
Agenda

1. CalPlanning Reporting Key Concepts Review
2. Hands on Navigation: Logging in, Accessing the Reporting Repository and Selecting Dimension Member Point of View to Run CalRptg Reports
3. Review Budget Process Report CR103, SRECNA Medium
4. Hands on Navigation: Selecting Dimension Member Point of View to Run CalRptg Reports
5. Review Recommended Budget Process Report CR120, SRECNA Trend
6. Review Recommended Budget Process Report CR603, Year to Date Comparison
7. Hands on Navigation: Run a Drillable Report, Refresh Report Data & Create a PDF
8. Timeframe POV Combinations
9. Hands on Navigation: Saving, Printing & Exporting a Report to MS Excel
11. Hands on Navigation: Run a Report with Prompts
12. Hands on Navigation: Save, Print & Export CalRptg Reports

Who Are CalPlanning Users?

<table>
<thead>
<tr>
<th>Reporting Only</th>
<th>Planners</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tool</strong></td>
<td><strong>Tool</strong></td>
</tr>
<tr>
<td>• CalRptg ★</td>
<td>• CalPlan</td>
</tr>
<tr>
<td></td>
<td>• HCP</td>
</tr>
<tr>
<td></td>
<td>• HCPRptg ★</td>
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<tr>
<td>Actions</td>
<td></td>
</tr>
<tr>
<td>• Run CalRptg reports</td>
<td>• Run HCPRptg reports</td>
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<tr>
<td>• Analyze reports</td>
<td>• Analyze reports</td>
</tr>
<tr>
<td></td>
<td>• Input financial plans</td>
</tr>
<tr>
<td></td>
<td>• Run &amp; analyze CalRptg and CalPlan reports</td>
</tr>
<tr>
<td></td>
<td>• Input employee and position plans</td>
</tr>
<tr>
<td></td>
<td>• Run &amp; analyze HCPRptg reports</td>
</tr>
<tr>
<td>Security</td>
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<td>• Global Read Only</td>
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<tr>
<td></td>
<td>• Entity Read &amp; Write Access</td>
</tr>
<tr>
<td></td>
<td>• Entity Read &amp; Write Access</td>
</tr>
</tbody>
</table>

Who Are CalPlanning Users?
CalRptg Tool

A pre-defined, canned reporting template module with Point of View (POV) member selection options.

**CalRptg** provides
- Access to Operating Budget, Forecast and Actual data
- Org Levels: visibility to data at L1 to L7 levels
- Timeframes:
  - Year Total, Quarterly & Monthly
  - Period or Period to Date - Year, Quarter and Month, with additional options for:
    - Rounding data to thousands or millions
    - Viewing actual data through the prior business day
- CalRptg Chart of Accounts (COA): includes all BFS COA values and CalPlan Summary COA

Source System: BFS for actuals, CalPlanning for saved plan data

HCPRptg Tool

Pre-defined or canned reporting module with Point of View (POV) member selection options to create user defined reports.

- Use to view Human Capital Planning (HCP) compensation plan data for future year Operating Budgets, in year Forecasts and Actuals
- Provides visibility to both employee level and summarized data
- Source Systems: Personnel Payroll System (PPS) for monthly actuals, CalPlanning for saved plan data
CalPlanning Application User Flow

**HCP (Human Capital Planning)**
Review and edit planned Compensation Expenses for Employee and Position.

**CalPlan**
Review and edit plan for Revenue, Transfers, and Non-Comp Expenses and view summarized Compensation Expense plans from HCP.

**CalRptg**
Generate and review reports of budget data from CalPlan and detailed Actuals from BFS.

**HCP Rptg**
Generate and review Compensation Expense reports for budget data from HCP by Employee and Position.

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**Chart2 and Program Code**

**Chart2** and **Program Code** are available for reporting in CalRptg and HCP Rptg only and are not used for creating plans in CalPlan.

★ **Best Practices**
- When not reporting on an individual member, we recommend keeping these selections at the top of the hierarchy to include all data.
- Set CF2 = Unassigned to view Actual data that is not coded with any CF2 ("blank" in BAIRS/BFS)
Available Dimensions in CalPlanning Tools

<table>
<thead>
<tr>
<th>Dimension</th>
<th>CalRptg</th>
<th>CalPlan</th>
<th>HCP</th>
<th>HCPRptg</th>
<th>Smart View</th>
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<tbody>
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<td>√</td>
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<td>Chart2</td>
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<td>Program Code</td>
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</tr>
<tr>
<td>Job Code</td>
<td></td>
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<td></td>
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</tr>
</tbody>
</table>

* HCP and HCPRptg only include Compensation related accounts

Intersections of Data

**Intersection** are unique combinations of dimension members where a data point is stored. Intersections are unique to each CalPlanning application.

- When a report is run or data is entered in a form, each dimension **must** be defined
- If a report comes back as a blank page, the intersection is set to a point where data does not reside
Point of View (POV)

- Unique set of dimension members that define specific intersections of data
- Represents the dimensions that are user selected in CalPlanning reports, CalPlan and HCP planning forms, and Smart View queries
- Dimension member selections determine what data is displayed in a CalPlanning report or planning form
- Available dimensions vary by report

Scenario and Version Combinations

Scenario is used to differentiate between the different types of financial data.

Versions intersect Scenario to allow for snap-shots of multiple iterations of data in a planning Process.

<table>
<thead>
<tr>
<th>Scenarios</th>
<th>Versions</th>
<th>Q1, Q2 &amp; Q3 Submission</th>
<th>Planner Submission</th>
<th>Final</th>
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<tr>
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<td>Working</td>
<td>Editable throughout budget cycle</td>
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<tr>
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<td>Initial</td>
<td>Read Only</td>
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<tr>
<td>Actual</td>
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<td>n/a</td>
<td>n/a</td>
<td>Read Only</td>
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</tbody>
</table>
**Introduction to CalPlanning Homework Exercise**

**Exercise 1: Identifying Your POV**

**Scenario:** You want to run a CalRptg report to review your current year Forecast that reflects all of the reforecasting you have done to date. Which Dimension Members would you select to return this data?

<table>
<thead>
<tr>
<th>CalRptg Report Name</th>
<th>Dimensions Members</th>
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<tbody>
<tr>
<td>Period</td>
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</tr>
<tr>
<td>Program Code</td>
<td></td>
</tr>
<tr>
<td>Chart1</td>
<td></td>
</tr>
<tr>
<td>Chart2</td>
<td></td>
</tr>
<tr>
<td>Time Series</td>
<td></td>
</tr>
</tbody>
</table>
## Financial Data Cross Walk

<table>
<thead>
<tr>
<th>Bottom Org Level</th>
<th>Planning Tools</th>
<th>Reporting Tools - All Read Only</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CalPlan</td>
<td>HCP</td>
</tr>
<tr>
<td></td>
<td>L7 DeptID for review and plan creation</td>
<td>L7 DeptID Employee &amp; Position Detail</td>
</tr>
<tr>
<td></td>
<td></td>
<td>HCPRptg</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Employee &amp; Position Detail</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Smart View</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mirrors Tool Levels</td>
</tr>
<tr>
<td></td>
<td></td>
<td>BAIRS</td>
</tr>
<tr>
<td>Top Org Level</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Available Scenarios</td>
<td>Top Org Level L3 Read-Only for viewing only</td>
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<tr>
<td></td>
<td>• Operating Budget</td>
<td>• Operating Budget</td>
</tr>
<tr>
<td></td>
<td>• Forecast</td>
<td>• Forecast</td>
</tr>
</tbody>
</table>

*Important to remember that journal level detail only resides in BAIRS*

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12. Hands on Navigation: Save, Print & Export CalRptg Reports
CalPlanning User ID and Password

Your CalNet ID and Passphrase are also your CalPlanning Workspace
User Name and Password

Access Option 1: CalPlanning via Blu

1. Login to [blu.berkeley.edu](http://blu.berkeley.edu)
2. Select Finance
3. Select CalPlanning
4. Login to CalPlanning with your CalNet ID and Passphrase
Access Option 2: CalPlanning via Internet Explorer

Access the CalPlanning systems webpage browser login link:
http://budget.berkeley.edu/systems/calplanning

Access Oracle Workspace from your Internet Explorer (IE) browser:
https://calpln-rptportal.berkeley.edu/workspace/index.jsp

The Oracle Workspace is access point for
• CalPlan
• CalRptg
• HCP
• HCPRptg

Access Option 3: Accessing CalPlanning via CITRIX

CITRIX remote desktop provides an easy way to access CalPlanning and avoid any browser compatibility issues.

1. Click the CITRIX link on the CalPlanning website:
   http://budget.berkeley.edu/systems/calplanning

2. Download the Citrix receiver (1st time only) and login using your CalNet ID & password

3. Select CalPlanning

4. Login to the Workspace using your CalNet ID & password
Workspace HomePage

The Workspace HomePage tab is an easy way to
• View Recently Opened reports and applications
• Access Quick Links for Favorites and all CalPlanning Applications

Navigating to CalRptg Template Repository

1. Navigate to the CalRptg reports by clicking on the Explore icon from the toolbar

2. Click on the + CalPlanning and then + CalRptg to expand the file folder to display the CalRptg report templates

3. Select a report by clicking on the report name, or right-clicking to run in a particular format (HTML or PDF).

Note: You can also open reports by clicking on the link from the Recently Opened section of the HomePage.
Exercise 2
CalRptg Exercise Workbook
Logging into CalPlanning Workspace and Accessing the CalRptg Report Repository

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CR103 Job Aid
Budget Creation Reporting
CR103 CalRptg
Statement of Revenue, Expenses and Change in Net Assets

CR103 - Statement of Revenue, Expenses and Changes in Net Assets

The Statement of Revenues, Expenses, and Changes in Net Assets or SRECNA report is the standard financial report at UC Berkeley and includes traditional revenue and expense statement elements, along with operating transfer activity that indicates the movement of resources between units.

The report displays data for the entity selected and can be expanded (drillable) at the account level, allowing users to see the detail accounts for revenue, expenses and fund balances. Those accounts are broken out by major Current fund buckets - expanded to Unrestricted and Restricted in the columns.

Questions answered with the CR103

Depending on the POV for the version, scenario, year and time period selected; this report can answer:

- Which fund type do I currently have balances? Are most of my monies restricted or unrestricted in nature?
- Is my unit running a surplus or deficit?
- What is driving my “miscellaneous” expenses? (Drill to the account level to view).

Report POV: Point Of View

- Enter the Point of View (POV) for reports to retrieve data
- Select members by clicking Select and choosing the member in the Preview User Point of View or by typing directly into the Dimension text field
- Once the POV is select, the members will persist until the dimension is edited
Cal Reporting Favorites

Once you have run a report you can add it or a report folder to your Favorites on the HomePage through the Favorites toolbar menu. Favorites are accessible from the Quick Links area on the HomePage. Manage Favorite to Hide or Remove reports from the Quick Links display.

Exercise 3
CalRptg Exercise Workbook
Selecting POV Members, Running a Report and Changing the POV
Report POV Toolbar and Header Display

- Reports open in HTML by default
- Member selections made in POV are displayed in the editable POV toolbar
- Header displays
  - Report Name
  - Entity
  - Time Series
  - Column and row labels

Report Layout – Footer

The member selections made in the POV are displayed and printed in the report footer.

POV will display dimensions selected when running this report

Data and timestamp when report was run

POV selections display in footer along with Run Date and Time
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CR120 Job Aid

Budget Creation Reporting
CR120 CalRptg
SRECNA Trend

CR120 - SRECNA Trend

The CR120 report is a trending report meaning it provides historical (i.e. prior fiscal years) Actuals data. The multi-year actuals can be compared against any scenario/version that is chosen. The report is in the standard SRECNA format.

Questions answered with the CR120

Depending on the POV for the version, scenario, year and time period selected; this report can answer:

- What area(s) of my revenue have been trending up or down over the last 3 or 4 years?
- What area(s) of my expenses have been trending up or down over the last 3 or 4 years?
- Are there spikes or seasonality in the trends that are helpful in understanding how the finances work in my unit?
- Does my budget, forecast or current-year actuals reflect a similar trend compared to the last 3 years? Is there any major swings or deviations from the trends?
Exercise 4
CalRptg Exercise Workbook
Running a Report on
Your Own

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CR603 Job Aid

Budget Creation Reporting  
CR603 CalRptg  
Year to Date Comparison

CR603 - Year to Date Comparison

The CR603 provides two comparisons:

- Compares year-total Actual data for the prior year to year-to-date Actual data for the same year.
- Compares current year-total for a selected scenario/version, to year-to-date Actuals

The report is expandable (drillable) to the account level detail for revenues only. The year total comparisons are displayed as a percent (%) of year total (meaning, Year to Date/Year Total).

Questions answered with the CR603

Depending on the POV dimension members selected for the Scenario, Version, Year and Period; this report can answer:

- Am I trending over or under my historical averages? If the first quarter of the year, historically has represented 34% of my year total, are my percent contributions above or below 34%? Or for the first half of the year, if my percent contributions have historically reflected six months of activity, are my percent contributions above or below 50%?
- Should I update my Forecast to better reflect my current financial position based on Actuals to-date?

Drilling-Down Into Report Data

- Some CalPlanning reports may allow for an expanded view of data in HTML format
- An arrow to the left of the member name will appear only in the HTML version of these Drillable reports
- Click on the arrow to drill-down into the hierarchy
Plan Only Members

- Provide summary level “Plan Only” values for select CalPlanning accounts, funds, and chart1s in CalPlan tool
  - Account Members (e.g. “440XX – Private Gifts for Current Use – Plan”)
  - Fund Members (e.g. “Unrestricted - Plan”)
  - Chart1 Members (e.g. “C1_SUMPLN - C1 - Summary - Plan”)

- Allow for high-level, strategic budgeting in CalPlan
- Individual members visible in CalRptg Actual reports

Plan Only Member Example

1 Plan Only Member

- 572XX - Travel - Plan

Individual Travel Accounts

- 57210 Travel Domestic
- 57211 In State Travel - Air Fare
- 57220 Travel Foreign
- 57221 Travel Foreign - Air Fare
- 57212, 57214, 57215, etc.

Viewing Data for Plan Only Members in CalRptg

Plan Only Members exist for Account, Fund, and Chart1

- In CalPlan, Planners may create their budget using a Plan Only Member
- In CalRptg, users can view values for both Plan Only Members and the Actual individual members and compare against the plan
CalRptg reports default to HTML and can be converted to PDF.
• HTML versions may have drill-down options on members in rows and/or columns.
• PDF versions are static and for printing.

Saving and Printing Reports

In the PDF format you can Print & Save from the navigation toolbar at the bottom of the report.
Refreshing Data

See the most current data from the database, by refreshing the report using the View menu (F5) or Refresh icon in the tool bar.

Reports will run a query against the database and retrieve latest data available.

Exercise 5
CalRptg Exercise Workbook
Drilling into Member Dimensions within a Report and Formatting as a PDF
Agenda

1. CalPlanning Reporting Key Concepts Review
2. Hands on Navigation: Logging in, Accessing the Reporting Repository and Selecting Dimension Member Point of View to Run CalRpto Reports
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12. Hands on Navigation: Save, Print & Export CalRpto Reports

Nightly Load of Actual Data in CalRpto

- Actual data in CalRpto refreshed nightly from BFS
  - Reports can be run to view Actual data as of the close of the prior business day for unclosed months &/or monthly Actuals for periods that have closed in BFS
  - CalRpto reports include a footnote with the date of the most recent nightly load and the date of closed monthly Actual data
  - Newly created Funds in BFS will be added to CalRpto nightly with temporary Fund type classifications that will be reviewed and updated after the monthly close

- CalPlan and HCPRpto reports have Actuals refreshed on a monthly basis after the month close
Period and Time_Series Intersection

The CalRptg application is updated every Monday to Saturday morning with data from the BFS financial system as of the prior day close of business. CalRptg users can view Actual data for either closed months in BFS or open months as of last daily update.

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<thead>
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<th>1_Your Entity</th>
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<tr>
<td>Scenario</td>
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<td>Version</td>
<td>Final</td>
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<table>
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<th>Time_Series</th>
<th>Year-to-Date ($)</th>
<th>Periodic ($)</th>
<th>Month (Last Closed)</th>
<th>Year-to-Date ($)</th>
<th>Periodic ($)</th>
<th>Month (Prior Unclosed)</th>
<th>Year-to-Date ($)</th>
<th>Periodic ($)</th>
<th>Current Month</th>
<th>Year-to-Date ($)</th>
<th>Periodic ($)</th>
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<tbody>
<tr>
<td>Resulting Data</td>
<td>Actuals for year to date.</td>
<td>Actuals for the total period selected which in this case is YearTotal.</td>
<td>YTD actuals through the last closed month.</td>
<td>Actuals for the total period selected which in this case is the last closed month.</td>
<td>Year-to-date data as of the last daily update. Could change since run prior to month close.</td>
<td>Actuals for the total period selected which in this case is the last unclosed month. Could change since run prior to month close.</td>
<td>Year-to-date data as of the last daily update. Will change. Will be the same as YearTotal.</td>
<td>Current month data as of the last daily update. Will change.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Examples of Period and Time_Series Intersections

This Smart View Ad Hoc query was run from the CalRptg cube to illustrate the multiple POV selection combinations of Period and Time_Series and the resulting intersections of Total Expenses data.
Exercise 6: Using the Time Series Dimension

For each of the report criteria combinations below identify the correct members for the Period, Time_Series and Year dimensions.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Data Needed</th>
<th>Period</th>
<th>Time_Series</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>January, February and March 2014</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>July through December 2015</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Daily Actuals, in CalRptg only, Current Year Actuals through yesterday</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Extra Credit: What member selections should be made in CalRptg to see daily Actuals through the prior day of this month?
Agenda

1. CalPlanning Reporting Key Concepts Review
2. Hands on Navigation: Logging in, Accessing the Reporting Repository and Selecting Dimension Member Point of View to Run CalRptg Reports
3. Review Budget Process Report CR103, SRECNA Medium
4. Hands on Navigation: Selecting Dimension Member Point of View to Run CalRptg Reports
5. Review Recommended Budget Process Report CR120, SRECNA Trend
6. Review Recommended Budget Process Report CR603, Year to Date Comparison
7. Hands on Navigation: Run a Drillable Report, Refresh Report Data & Create a PDF
8. Timeframe POV Combinations
9. Hands on Navigation: Saving, Printing & Exporting a Report to MS Excel
11. Hands on Navigation: Run a Report with Prompts

Exporting Reports

CalRptg reports can be exported to Microsoft Excel, Word, and PowerPoint.
Setting Formatting Preferences

Select custom formatting for viewing reports using the Financial Reporting Preference option.

Exercise 7
CalRptg Exercise Workbook
Exporting a CalPlanning Report to MS Excel
1. CalPlanning Reporting Key Concepts Review
2. Hands on Navigation: Logging in, Accessing the Reporting Repository and Selecting Dimension Member Point of View to Run CalRptg Reports
3. Review Budget Process Report CR103, SRECNA Medium
4. Hands on Navigation: Selecting Dimension Member Point of View to Run CalRptg Reports
5. Review Recommended Budget Process Report CR120, SRECNA Trend
6. Review Recommended Budget Process Report CR603, Year to Date Comparison
7. Hands on Navigation: Run a Drillable Report, Refresh Report Data & Create a PDF
8. Timeframe POV Combinations
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11. Hands on Navigation: Run a Report with Prompts

**CR301 Job Aid**

**Budget Creation Reporting**
CR301 CalRptg
Entity Summary by Entity Selection

**CR301 - Entity Summary by Entity Selection**

A multi-year comparison of a single or multiple entities via a Prompt*. Provides variance analysis of selected Scenario/Version to the previous year’s Actuals.

The CR301 report is NOT drillable and the variances are calculated as dollar ($) and percentages (%). If reviewing the dollar ($) variances, the formula is Forecast minus Actuals. The percentage (%) variances takes the dollar difference, divided by Actuals.

**Questions answered with the CR301**

Depending on the POV for the Version, Scenario, Year and Time Period selected; this report can answer:

- What is the sum-total amount of Actuals for revenue, expenses or beginning/ending balances for the entities I’ve selected in my unit?
- What is the sum-total for my budget or forecast for the entities I’ve selected in my unit?
- What is the dollar ($) or percent (%) variance between last year’s actuals and my current forecast (or budget) for the entities I’ve selected in my unit?
Running Reports with Prompts

- Some reports will prompt for member selections prior to running the report.
- A prompt allows for variable selections, or the option to choose more than one member.
- You have the option to accept the default member(s) or you can also choose your own member(s) as desired.

Click in Edit Member Names field to activate Selection box to type in member

Exercise 8
CalRptg Exercise Workbook
Running Reports with Prompts
**Flow and Timing In Our Financial Landscape**

**BFS/BAIRS/Cal Answers Financials**
- Cal Answers Financials
- BAIRS (Berkeley Administrative Initiative Reporting System)
- BFS (Berkeley Financial System)

**CALPLANNING**
- CalPlan
- 5xDaily * Summarized Compensation Plans
- HCP (Human Capital Planning)
- 5xDaily * Operating Budget & Forecast Plan Data
- Smart View
- HCP Rptg
- 5xDaily * Detailed Position & Employee Compensation Plans
- Monthly Detailed Employee Payroll & FTE Actuals

**FY2019 Annual Snapshot**
- Detailed Employee & Position Data
- HCM (Human Capital Management) snapshot on 1/##/2018 of active data from 7/01/2017 and forward

**HCM (Human Capital Management)**
- Nightly Detailed Employee & Position Data

**PPS (Payroll Personnel System)**

* Data pushes every three hours between 9:00am and 9:00pm. Check [http://budget.berkeley.edu/systems/calplanning](http://budget.berkeley.edu/systems/calplanning) for more on the data push schedule and updates to CalPlanning system availability.

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**CalPlanning Website**

Check out the CalPlanning website for up to date info on:
- Browser and Citrix links to the CalPlanning Workspace
- Training, reference materials and local unit support
- Latest news and system updates
- Monthly Actuals Upload Schedule
- Help Desk Information

[http://calplanning.berkeley.edu](http://calplanning.berkeley.edu)
CalPlanning Availability & Data Push Schedule

CalPlanning Availability

- **Available**: Monday – Friday, 8am-5pm with technical support, except University holidays
- **Available**: Monday – Friday, 7am-8am, 5pm-3am, and weekends but without technical support
- **Unavailable**: 3am-7am daily

CalPlanning Data Push Schedule

CalPlanning plan data is pushed from
- HCP to both CalPlan and HCPRptg and from
  - CalPlan to CalRptg
5 times daily in the first 15 minutes of the hour starting at 9:00am and then every three hours until 9:00pm.

**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.

<table>
<thead>
<tr>
<th>Data Push Schedule*</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00am - 9:15am</td>
</tr>
<tr>
<td>12:00pm - 12:15pm</td>
</tr>
<tr>
<td>3:00pm - 3:15pm</td>
</tr>
<tr>
<td>6:00pm - 6:15pm</td>
</tr>
<tr>
<td>9:00pm - 9:15pm</td>
</tr>
</tbody>
</table>

*Do not run reports during the push

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Access & System Requirements for CalPlanning

Access the CalPlanning web-based Workspace at either:

- [https://calplnrptportal.berkeley.edu/workspace/index.jsp](https://calplnrptportal.berkeley.edu/workspace/index.jsp)
- [https://citrix.berkeley.edu](https://citrix.berkeley.edu)

System requirements

- Help Desk-supported system requirements for CalPlanning are:
  - **Internet Explorer 11 with Enterprise Mode**
  - Windows 7 & 8.1
  - Microsoft Office 2007, 2010 or 2013
  - Adobe Acrobat Reader 7.0+ or higher
- MAC users and those with un-supported systems (Windows 10 &/or Office 2016) need to access via Citrix to connect to CalPlanning &/or Smart View
Support: Technical and Non-Technical

For technical help with the CalPlanning tool (including logging into or using CalPlan, CalRptg, HCP, HCPRptg and Smart View), contact:

• **CalPlanning Help Desk**
  - Hours: 8 a.m. to 5 p.m., Monday - Friday, except for University holidays
  - E-mail: calplanhelp@berkeley.edu
  - Phone: (510) 664-9000, Phone Tree: Option 1 (IT), Option 2, then Option 4 (CalPlanning)

For non-technical Budget Process help including questions about your Division’s requirements, decisions for your unit and your CalPlanning access contact your

• [Local CalPlanning Support Person](#)
• [Divisional Finance Leader (DFL)](#)

THANK YOU!

Evaluation link