

List of Adaptive Planning Reports

Adaptive Planning Report Name	Description	Report Type
01.01 Budget Review: Consolidated View	Standard P&L in URC Format Columns: Prior Year Actual (3 years) and Current Year Actual YTD, Current Year Budget, Current Year Forecast, and Next Year Budget Consolidated. Includes variance calculations (\$/%) Parameters: Level, Current Year Forecast, Next Year Budget, Fund, Driver Worktag and Optional Worktags Notes: Includes column suppression	HTML
01.02 Budget Review: Business Unit View	Standard P&L in URC Format Columns: Prior Year Actual, Current Year Budget, Current Year Forecast, and Next Year Budget by Business Unit Hierarchy. Parameters: Level, Current Year Forecast, Next Year Budget, Fund, Driver Worktag and Optional Worktags Notes: Includes column suppression	HTML
01.04 Budget Review: Fund Hierarchy View	Standard P&L in URC Format Columns: Prior Year Actual, Current Year Budget, Current Year Forecast, and Next Year Budget by Fund Hierarchy. Parameters: Level, Current Year Forecast, Next Year Budget, Business Unit, Driver Worktag and Optional Worktags Notes: Includes column suppression	HTML
01.05 Budget Review: Fund Hierarchy by Level	High-Level P&L by Level (Cost Center) Columns: Prior Year Actual, Current Year Budget, Current Year Forecast, and Next Year Budget by Fund Hierarchy Parameters: Level, Current Year Forecast, Next Year Budget, Business Unit, Driver Worktag and Optional Worktags Notes: Includes column suppression	HTML
01.06 Budget Review: Operating Export by Driver Worktag & Program	Actual and Plan Excel Extract by GL Account (Sales Item/Spend Category), Level, Driver Worktag, Program and Assignee. Columns: Prior Year Actual (3 years) and Current Year Actual YTD, Current Year Budget, Current Year Forecast, and Next Year Budget Consolidated Parameters: Level, Current Year Forecast, Next Year Budget, Fund, Business Unit, Driver Worktag and Optional Worktags. Notes: Includes column suppression	XLS
01.10 Budget Review: Consolidated View by Level	High-Level P&L by Cost Center includes Next Year Budget, Current Year Forecast, Current Year Budget, Current Year Actual YTD, and Prior Year Actuals (3 years) with variance calculations (\$/%) Parameters: Current Year Forecast, Next Year Budget, Fund, Driver Worktag and Optional Worktags	HTML
01.11 Budget Review: Restricted Expenses by Level and Fund	Endowments, Grants, & Gifts only by Driver Worktag and Level. Summarized P&L across the columns Parameters: Version and Time	HTML

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01.12 Plan Compare: Multi-Year	Simple P&L allows for selection of three versions for comparison across multiple years (ex: FY25B vs FY24B vs FY23B) Parameters: Prior Year Plan Version, Current Year Plan Version, Next Year Plan Version, Level, Fund, Business Unit, Driver Worktag and Optional Worktags.	HTML
01.12 Plan Compare: Single-Year	Simple P&L allows for selection of two versions for comparison within same year (ex: FY24F vs FY24B) Parameters: Version 1, Version 2, Time for Version Comparison, Level, Fund, Business Unit, Driver Worktag and Optional Worktags.	HTML
01.13 Position Plan Compare: Multi-Year	Simple P&L allows for selection of three versions for comparison across multiple years (ex: FY25B vs FY24B vs FY23B) Parameters: Prior Year Plan Version, Current Year Plan Version, Next Year Plan Version, Level, Position, Fund, Business Unit, Driver Worktag and Optional Worktags.	HTML
01.13 Position Plan Compare: Single-Year	Simple P&L allows for selection of two versions for comparison within same year (ex: FY24F vs FY24B) Parameters: Version 1, Version 2, Time for Version Comparison, Level, Position, Fund, Business Unit, Driver Worktag and Optional Worktags.	HTML
01.16 Current Year Plan & YTD Actual Comparison	Standard P&L by Account/Account Summary Columns: Current Year Plan, Current YTD Actual, Prior 2 Years of Actual (full year and YTD) and Variance Columns Parameters: Level, Current Year Plan (Budget or Forecast version), Fund, Business Unit, Driver Worktag and Optional Worktags	HTML
Adaptive Required Fields by Sheet	Excel file documenting required fields by sheet for the Budget and Forecast planning processes in Adaptive Planning.	XLS

Note: YTD actuals are updated monthly in Adaptive.