Training Guide for:
Org and Planning Fund Pivot Report

Who should use this guide:
Departmental and/or College financial planners involved in the All-Funds management and planning.

Purpose:
This report provides a summary of sources and uses for a specific college/division listed by budget category, with the option to break down data by planning fund or by Organization for a given fiscal year (including prior years).

Locating the report:
Arizona.axiom.cloud
Navigating the report:

Use the filter menu to access prior or current planning budget data and retrieve information by Level or by Planning Fund.

Additional filter options will become available depending on your selection.

- Options available when selecting Fund:
  - **Budget Year** - Use this filter to access data for current Budget Year or prior Budget Year.
- **Planning Column** - Select the desired fiscal year. This is a **required field**, and you can display only one year at the time.

- **Level** - Use this field to select a College/Division or Organization.

- **Options available when selecting Level:**
  - Aside from the options listed above, the filter menu will also display the **Fund** field to filter data by planning fund. This is not a required field, and you can select only one fund at the time. Leave blank if you want the report to return data for all funds.
  - The **Level** field becomes a required field; options are limited to the College/Division level.
  - **NOTE:** After running the report if you’d like to change the ‘Level or Fund’ filter to Fund, you’ll need to clear all the filters first and make new selections.
Your selections will be displayed at the top of the report.

The report also offers the export to Excel and PDF functions, options to hide rows and the Views function to include or exclude Budget Request data. These options are located on the top-right corner:
Understanding your data:

The report provides a summary of sources and uses data listed by Budget Category. Data is broken down by Planning Fund or by Organization, depending on the option selected in the ‘Select Level or Fund’ filter. The information displayed in the report comes from the Operating Budget module.

Displaying data by Fund - Data will be broken down by planning fund for the year selected in the ‘Select Planning Column’ filter.

Displaying data by Fund - Data will be broken down by Organization for the year selected in the ‘Select Planning Column’ filter.

For additional questions, please contact your assigned Budget Analyst.