

6.7 Generation of the Departmental Planning Spreadsheet (DPS)

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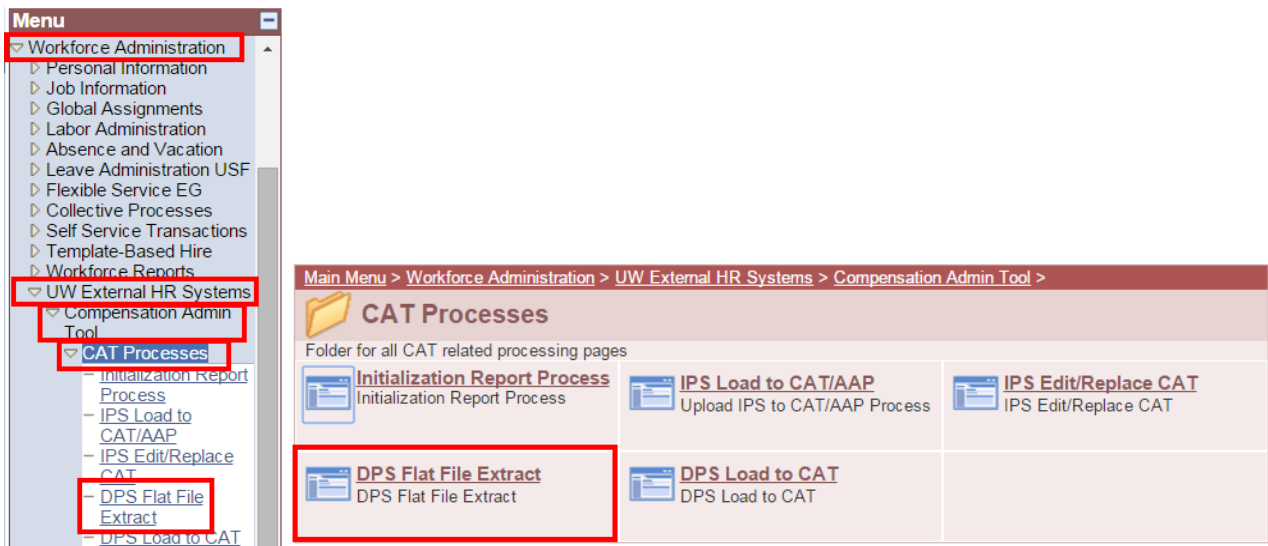
This procedure outlines the process for creating a Flat File from the CAT in order to populate the DPS Template and ready the template for editing. Divisional Budget Officers will complete this process.

General Description

Downloading the DPS Flat File will allow Divisional Budget Officers to extract data from the CAT in order to copy and paste the CAT data into the Excel DPS Template. This template can be emailed or shared electronically with departmental administrators to assist in the annual process of administering compensation and funding changes for Faculty, Academic Staff, Limited, Employees-in-Training, and University Staff.

Downloading the DPS Flat File

1. In HRS, go to Workforce administration > UW External HR System > Compensation Administration Tool > CAT Processes> DPS Flat File Extract



2. Create a Run control ID by selecting the “Add a New Value” tab. Enter desired name for Run Control ID into the Run Control ID box and select add. (No spaces can be used in the naming of the Run Control ID)

You can also open an existing Run Control ID by selecting the “Find an Existing Value” tab and clicking search.

DPS Flat File Extract

Find an Existing Value
Add a New Value

Run Control ID:

3. Fill in the following run control parameters to define the data that will be captured for the DPS flat file output.
 - a. **Fiscal Year** – Select the upcoming “Fiscal Year”, as recognized for budgeting purposes. This field will default to the latest fiscal year that is set up in the CAT. Example: if it is January of 2016 and you are planning for the next Fiscal Year, this value should default to 2017.
 - b. **Business Unit** – Enter UWMSN
 - c. **Division** – Select desired division to return employee records. Note: the selection will return all employees listed in selected home division and any employees with funding entered with selected division.
 - d. **Department** – Select department or sub-department to return employee records. Note: the selection will return all employees listed in selected home department and any employees with funding entered with selected department. You can leave this box blank if you wish to include records for the entire division.
 - e. **Employee Class** – The default for this run control is to have all employee classes included in the DPS Flat File output. If you wish to exclude certain employee classes, click the Select Values button and uncheck the boxes next to the Empl Class code. Note: CAT is only populated with Employee Classes AS, CJ, CP, ET1, ET3, ET4, FA, and LI.
 - f. **Continuing Staff Base (CSB)** – Select all to return all employee records, regardless of inclusion in CSB; select yes to only include employee records counted in the CSB; or select no to only include employees not in CSB. (Make sure to leave this as “All”. Supplemental instructions will be provided during a pay plan year.)

4. After entering Run Control Criteria, select “Run” to begin report processing.

DPS Flat File Extract

Run Control ID: SMPH_FLAT_FILE
[Report Manager](#)
[Process Monitor](#)
Run

Process Instance: 2085454

DPS Flat File Run Parameters

<p>*Fiscal Year <input style="width: 50px;" type="text" value="2017"/> <input type="button" value="Q"/></p> <p>*Business Unit <input style="width: 50px;" type="text" value="UWMSN"/> <input type="button" value="Q"/></p> <p>Division <input style="width: 50px;" type="text" value="A53"/> <input type="button" value="Q"/></p> <p>Department <input style="width: 50px;" type="text" value="A5312"/> <input type="button" value="Q"/></p> <p>*CAT CSB Flag <input style="width: 50px;" type="text" value="All"/></p>	<p style="background-color: #D2B48C; padding: 2px; margin: -5px -5px 5px -5px;">Employee Class</p> <p>Employee Class - All Values: <input type="checkbox"/></p> <p style="text-align: center; background-color: #FFFF00; padding: 2px 10px; margin-top: 5px;">Select Values</p>
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- After selecting run, the Process Scheduler Request page will display. Select “Ok”.

Process Scheduler Request

User ID: 00519317 Run Control ID: SMPH_FLAT_FILE_

Server Name: ▼ Run Date: 12/29/2015

Recurrence: ▼ Run Time: 8:25:25AM [Reset to Current Date/Time](#)

Time Zone:

Process List						
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	DPS Extract	UW_CAT_DPS	Application Engine	Web ▼	TXT ▼	Distribution

[OK](#) [Cancel](#)

- User will be directed back to Run Control Process page. Select on the “Process Monitor” hyperlink to view the Process List.

DPS Flat File Extract

Run Control ID: SMPH_FLAT_FILE_ [Report Manager](#) [Process Monitor](#) [Run](#)

Process Instance: 2085456

DPS Flat File Run Parameters

*Fiscal Year: 2017

*Business Unit: UWMSN

Division: A53

Department: A5312

*CAT CSB Flag: All ▼

Employee Class

Employee Class - All Values:

[Select Values](#)

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

- Click the Refresh button until the “Run Status” is “Success” and the “Distribution Status” is “Posted”.
- Once Run Status is “Success” and the Distribution Status is “Posted”, select the “Details” hyperlink to route to the Process Detail page.

[Process List](#) | [Server List](#)

Actions

User ID
 Type Last 7 Days

Server Name
 Instance to

Run Status Distribution Status Save On Refresh

Process List Personalize | Find | View All | First 1-10 of 10 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2085456		Application Engine	UW_CAT_DPS	00519317	12/29/2015 8:25:25AM CST	Success	Posted	<input type="button" value="Details"/>

9. On the Process Detail page, select the "View Log/Trace" hyperlink from the Process Detail page.

Process Detail

Process

Instance 2085456 **Type** Application Engine
Name UW_CAT_DPS **Description** DPS Extract
Run Status Success **Distribution Status** Posted

Run **Update Process**

Run Control ID SMPH_FLAT_FILE_
Location Server **Hold Request**
Server PSUNX **Queue Request**
Recurrence **Cancel Request**
 Delete Request
 Restart Request

Date/Time **Actions**

Request Created On 12/29/2015 8:26:00AM CST [Parameters](#) Transfer
Run Anytime After 12/29/2015 8:25:25AM CST [Message Log](#) [View Locks](#)
Began Process At 12/29/2015 8:26:14AM CST [Batch Timings](#)
Ended Process At 12/29/2015 8:26:28AM CST

10. Select the UW_CAT_DPS_FLAT_FILE_#####.xls hyperlink to open the output file.

View Log/Trace

Report

Report ID: 1171870 **Process Instance:** 2085456 [Message Log](#)

Name: UW_CAT_DPS **Process Type:** Application Engine

Run Status: Success

DPS Extract

Distribution Details

Distribution Node: HRQA_RPTNOD **Expiration Date:** 12/28/2016

File List

Name	File Size (bytes)	Datetime Created
AE_UW_CAT_DPS_2085456.AET	3,770	12/29/2015 8:26:28.366846AM CST
AE_UW_CAT_DPS_2085456.log	1,355	12/29/2015 8:26:28.366846AM CST
AE_UW_CAT_DPS_2085456.trc	205	12/29/2015 8:26:28.366846AM CST
UW_CAT_DPS_FLAT_FILE_2085456.xls	561,138	12/29/2015 8:26:28.366846AM CST

Distribute To

Distribution ID Type	*Distribution ID
User	00519317

11. The DPS Flat File output file should look like similar to image below.

DPS Flat File

Report Parameters:				Process Instance: 2083258
Run Control	SMPH_FLAT_FILE		Run By: 01234567	
Run Date:	12/29/15			
Fiscal Year:	2017		Funding: A5312	
Business Unit:	UWMSN		Employee Class: AS,CJ,CP,ET1,ET3,ET4,F,LI	
CSB:	A		Total Records: 5	

JOB DATA DEPTID (UDDS)	BUSINESS UNIT	EMPLOYEE CLASS	JOB CODE DE	JOB CODE DESCRIPTION	LAST NAME	FIRST NAME	EMPLOYEE ID	EMPLOYEE RECORD NUMBER
A348700	UWMSN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	01234567	0
A348700	UWMSN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	01234567	0
A348700	UWMSN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	01234567	0
A348700	UWMSN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	01234567	0
A348700	UWMSN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	01234567	0
A348700	UWMSN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	01234567	0
A348700	UWMSN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	01234567	0
A348700	UWMSN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	01234567	0
A348700	UWMSN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	01234567	0
A348700	UWMSN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	01234567	0
A348700	UWMSN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	01234567	0
A348700	UWMSN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	01234567	0
A348700	UWMSN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	01234567	0
A348700	UWMSN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	01234567	0
A348700	UWMSN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	01234567	0

12. Save the file to your computer.
- Make sure to save the file as an Excel Workbook.

File name: UW_CAT_DPS_FLAT_FILE_2086270

Save as type: Excel Workbook

Populating the DPS Template

After successfully downloading and saving the DPS Flat File, you are now ready to populate the DPS Template.

1. Open the DPS Template located on the Madison Budget Office Website (<http://www.mbo.wisc.edu/242.htm>)
 - a. The template is saved under the COMP ADMIN TOOL (CAT) tab



- b. Save a copy of the template to your computer
 - i. Make sure to save the copy as an Excel Macro-Enabled Workbook

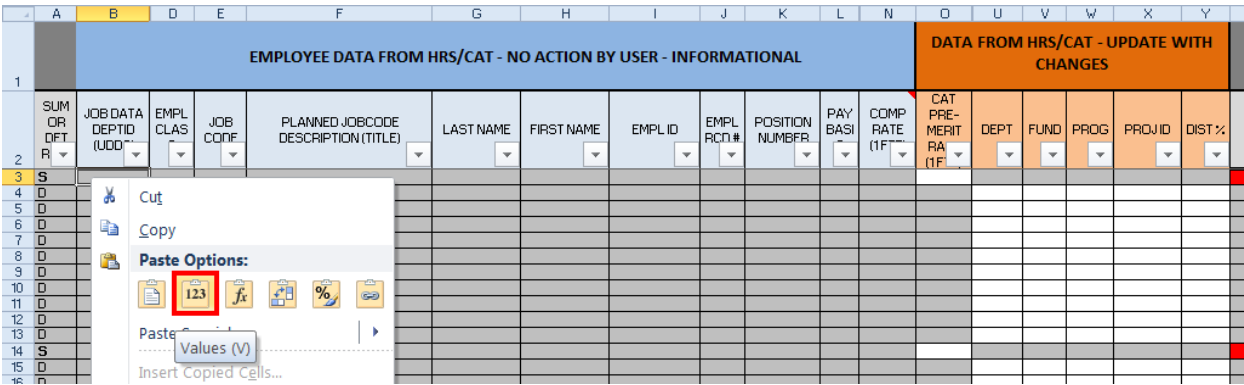
Save as type: **Excel Macro-Enabled Workbook**

2. If not already, open both the DPS Template and the Flat File created earlier.
3. Copy all the HRS job and funding data from the DPS Flat File (exclude the headings colored green).
 - a. In the DPS flat file, start in cell A13 and select all the data on row 13 from Column A (JOB DATA DEPT (UDDS)) to Column Y (DIST %).
 - b. Next, hold Ctrl+Shift+Down Arrow key (this will highlight all the data in your columns **not** including the column headings)
 - c. Next, hold Ctrl+C to copy the highlighted data

DPS Flat File																
Report Parameters:																
Run Control	SMFH		Process Instance:		2003258											
Run Date:	10/30/15		Run By:		0091917											
Fiscal Year:	2017		Funding:		A532											
Business Unit:	UWMEN		Employee Class:		A532											
CSB:	A		Total Records:		5											
JOB DATA DEPTID (UDDS)	BUSINESS UNIT	EMPLOYEE CLASS	JOB CODE	DESCRIPTION	LAST NAME	FIRST NAME	EMPLOYEE ID	FUNDING OK TO LOAD?	IND WILL NOT PASS TO HRS	COMMENT	BUS UNIT	DEPT D	FUN G	PRO P	PRJ ID	DIST %
A348700	UWMEN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	095592	OK TO LOAD		COMMENT	UWMEN	534255	14	4		30.00
A348700	UWMEN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	095592	N			UWMEN	348700	14	4		47.00
A348700	UWMEN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	095592	N			UWMEN	348700	233	4	PRJ68AT	25.00
A348700	UWMEN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	095592	N			UWMEN	532550	233	4		8.00
A348700	UWMEN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	095592	N								
A348700	UWMEN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	095592	N								
A348700	UWMEN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	095592	N								
A348700	UWMEN	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	095592	N								
A532000	UWMEN	AS	T32EN	SR SYSTEMS PROGRAMMER	AUSTERO	LUCILLE	089054	OK TO LOAD		COMMENT	UWMEN	532550	136	4		30.80
A532000	UWMEN	AS	T32EN	SR SYSTEMS PROGRAMMER	AUSTERO	LUCILLE	089054	N			UWMEN	532550	136	4		63.940
A532000	UWMEN	AS	T32EN	SR SYSTEMS PROGRAMMER	AUSTERO	LUCILLE	089054	N								
A532000	UWMEN	AS	T32EN	SR SYSTEMS PROGRAMMER	AUSTERO	LUCILLE	089054	N								
A532000	UWMEN	AS	T32EN	SR SYSTEMS PROGRAMMER	AUSTERO	LUCILLE	089054	N								
A532000	UWMEN	AS	T32EN	SR SYSTEMS PROGRAMMER	AUSTERO	LUCILLE	089054	N								
A532000	UWMEN	AS	T32EN	SR SYSTEMS PROGRAMMER	AUSTERO	LUCILLE	089054	N								
A532000	UWMEN	AS	T32EN	SR SYSTEMS PROGRAMMER	AUSTERO	LUCILLE	089054	N								
A532000	UWMEN	AS	T32EN	SR SYSTEMS PROGRAMMER	AUSTERO	LUCILLE	089054	N								

4. Navigate to the DPS Template.
 - a. In the DPS, on the tab “DPS”, right click on cell B3 and paste “VALUES” (the icon that looks like a clipboard with 123). See the image below.
 - b. Next, navigate to the tab “DPS Copy (Paste Flat File Only)”, right click on cell B3 and paste “VALUES”.

Note: Pasting as values is crucial to the DPS template. Simply pasting, without selecting values, will override formatting already in place and cause some of the template features to fail.



5. The template will be populated and look similar to the image below.

EMPLOYEE DATA FROM HRS/CAT - NO ACTION BY USER - INFORMATIONAL											DATA FROM HRS/CAT - UPDATE WITH CHANGES					AUTO CALC	USER ENTRY	AUTOMATIC CALCULATION S	SHOW FTE CHANGE INDICATOR	HIDE FTE CHANGE INDICATOR	
SUM OR DET	JOB DATA DEPTID (UDD)	EMPL CLAS	JOB CODE	PLANNED JOB CODE DESCRIPTION (TITLE)	LAST NAME	FIRST NAME	EMPLID	EMPL RCD#	POSITION NUMBER	PAY BASI	COMP RATE (1F)	CAT PRE-MERIT RA (1F)	DEPT	FUND	PROG	PROJID	DIST%	DIST% CHECK	BODGT FTE	BASE SALARY BY FUNDING (ADJ FOR BUN. FTE)	COMMENTS
S	A348700	AS	E10LN	ASSISTANT SCIENTIST	BLUTH	MICHAEL	01234567	0	01234567	A	86,709	86,709	DEPT	FUND	PROG	PRJID	DIST%	100.000	1.00000	\$ 86,709.000	
D													S34255	144	4		10.000	10.000	0.10000	\$ 8,671.000	
D													348700	144	4		47.000	47.000	0.47000	\$ 40,753.000	
D													348700	233	4	PRJ6SAT	35.000	35.000	0.35000	\$ 30,348.000	
D													531250	233	4		8.000	8.000	0.08000	\$ 6,937.000	
S	A531200	AS	T32BN	SR SYSTEMS	AUSTERO	LUCILLE	01234567	0	01234567	A	90,742	90,742	DEPT	FUND	PROG	PRJID	DIST%	100.000	1.00000	\$ 90,742.000	
D													531200	233	4		30.160	30.160	0.30160	\$ 27,368.000	
D													531253	136	4		63.840	63.840	0.63840	\$ 63,374.000	

6. Right click on the tab “DPS Copy (Paste Flat File Only)” and click hide.

