



PlanUW Processes

QUICK REFERENCE GUIDE

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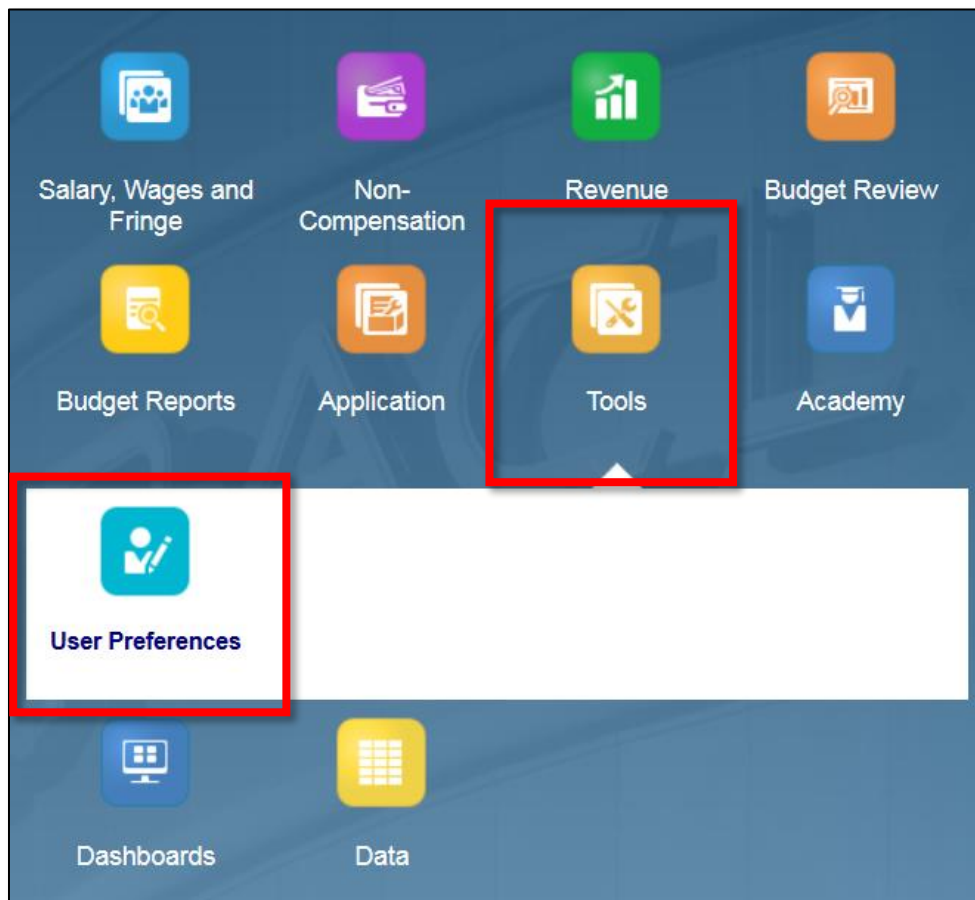
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Revision History

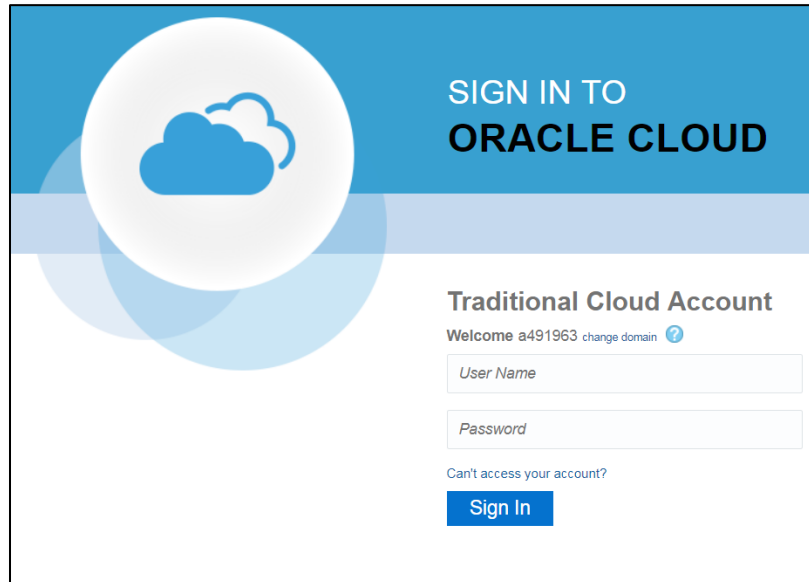
Version	Key Revisions	Modified By	Date
1.0	Initial Document Creation	Huron Consulting	TBD

Setting User Variables



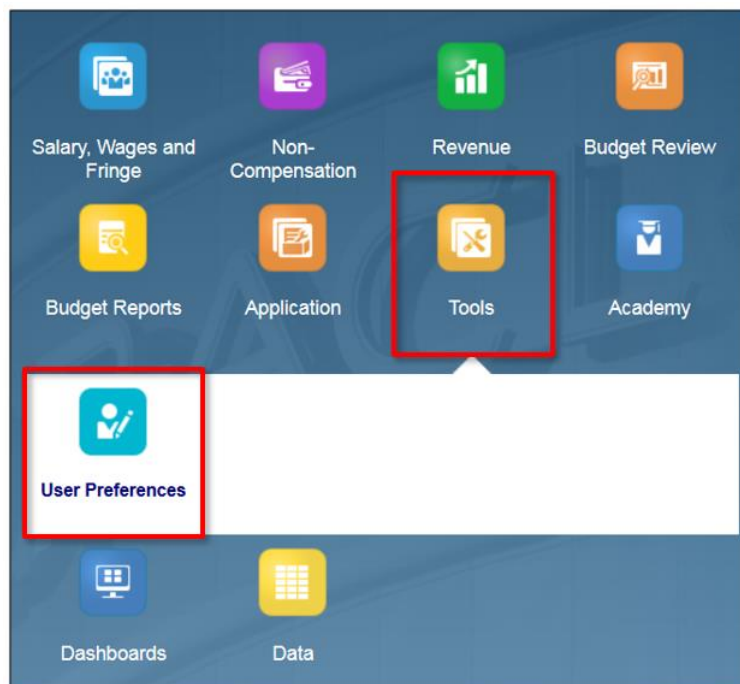
Step 1.

Login to PlanUW: <http://>



Step 2.

Once in the home page, click on **Tools>User Variables**.



Step 3.

In the Variables page, click on the “**User Variables**” option first and then click on the **drop-down** link:

The screenshot shows the 'User Preferences' page. On the left, under 'Preferences', the 'User Variables' option is highlighted with a red box. The main area shows a table titled 'User Variables' with columns: Dimension, User Variable, and Member. The table has two rows. The second row, with 'Department' in the 'Dimension' column, has its 'Department' cell highlighted with a red box, indicating the drop-down link to be clicked.

Dimension	User Variable	Member
Department	Total Institution	UWSUP
Department	User Institution	UWSUP



NOTE: When setting User Variables, you only need to select a member for the Organization dimension. Do not edit any of the other dimensions.

Step 4.

Members can be selected in two ways from the Member Selection window: Through the **Search Bar**, or by selecting **Hierarchies**. Click **OK** to save.

The screenshot shows the 'Select a Member' window. The 'Department' tab is selected. The 'Search Department' bar is highlighted with a red box. The 'UW ORG ALL_ORGS (SUP)' option is selected in the list, and its details are expanded, showing a list of departments. The 'OK' button is highlighted with a red box.

Department	Details
UW ORG ALL_ORGS (SUP)	<ul style="list-style-type: none"> GENL_EDUC_ADMIN - 01-General ... GENERAL_SERVICES - 02-General... STU_AFF_&_COUNSEL - 03-Studen... ACADEMIC_DEPARTMENTS - 05-Aca... GENERAL_ACAD_INSTR - 06-Gener... SUMMER_SESSION - 10-Summer Se... GRADUATE_STUDIES - 18-Graduat... WOMENS_PROGRAMS - 49-Women's ... CAMPUS_COMPUTING - 53-Campus

Step 5. – FOR POWER USERS ONLY

To set variables at Total Institution level, follow the same steps described in this section by selecting the Institution at the higher level.

Planning and Budgeting Cloud: PLNUWNE

Appearance Variables Announcements Artifact Labels Access Control Daily Maintenance Connections Migration Audit User Preferences

Preferences

General Display Notifications Ad Hoc Options User Variables Financial Reporting Form Printing

User Variables

Dimension	User Variable	Member
Department	Total Institution	UWOSH
Department	User Institution	UWOSH

OK

Select a Member

Department UWSTP

Search Department

UWOSH

✓ UWSTP

UWGBY

UWSYS

UWADM

OK Cancel

Members Department> UWSTP

Completing Budgeting Tasks in PlanUW Section

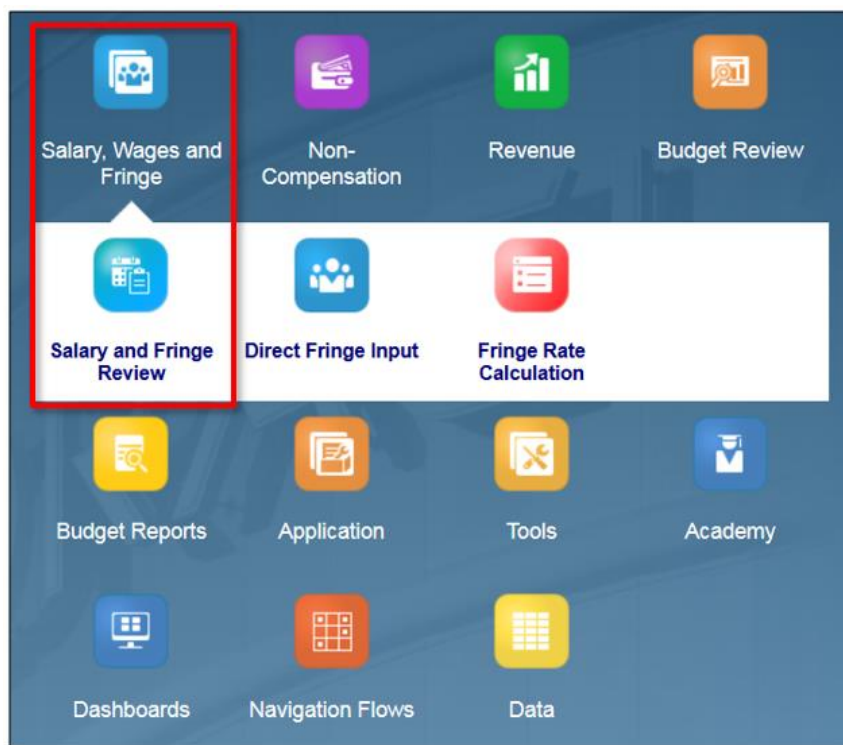
- ✓ Reviewing Salary Data
- ✓ Input Fringe Rates
- ✓ Calculating Fringe Using Rates Review
- ✓ Input Fringe Data
- ✓ Reviewing Fringe Data
- ✓ Input Non-Comp Data
- ✓ Reviewing Non-Comp Data
- ✓ Input Revenue Data

Salary & Wage Review



Step 1.

Start by clicking on the **Salary, Wages and Fringe** cluster. Then click on the **Salary and Fringe Review**:



Step 2.

The form should appear containing the data needed.

Salary and Fringe Review

Department

Fund

Program

Project

UW EAU TOP (EAU)

Fund Total

Program Total

No Projects Eau Claire

Data

Ad Hoc

Format

	2016 - 2017	2017 - 2018	2016 - 2017	2016 - 2017	2016 - 2017	2019 - 2020	---	2019 - 2020												
	Actual	Actual	Actual	Budget	Budget	Budget	---	CY vs. PY Budget (\$)												
	Final	Final	Final	Final	Revised Budget	Working	---	Working												
	Total Year	Total Year	Aug YTD	Total Year	Total Year	Total Year	---	Total Year												
Permanent FTE							948	948												
Graduate Asst FTE																				
----- SALARY -----																				
Faculty Salary	25165764	26171236	1828647				23474380	23474380												
Academic Staff Salary	23860418	25566630	2995673				20556766	20556766												
University Staff Salary	13509559	13551620	2059027				13543506	13543506												
Salary - Other	0	0	0																	
Postgrad Trainee Salary																				
Graduate - RA Salary																				
Graduate - PA Salary	334598	471360																		
Graduate - TA Salary																				
LTE Salary	775430	485182	139910				611639	611639												
Student Salary	6462630	6329107	1110475				7403041	7403041												
Salary	70108390	72575135	8133731				65589332	65589332												



NOTE: Remember that you are able to change the POV by clicking on the **DEPARTMENT TOTAL**, **FUND TOTAL**, **PROGRAM TOTAL**, and **NO PROJECT** links and selecting the appropriate information.

Input Fringe Rates



Before Starting

A few things to consider before beginning the process of **Inputting Fringe Rates**:

- Campuses in the WEST, SO, and NE regions must set user variables. *This excludes the Madison and Milwaukee campuses.*
- Power and ADMIN Users must **set and push Global Rates** before starting the input process.
- The Calculating Fringe Using Rates process can be accomplished by following two options:
 - By entering and reviewing data by **Individual Staff Position Form**
 - By entering and reviewing data by **All Staff Position Form**
 - *Both options follow the same steps in the process.*

Step 1. SETTING AND PUSHING GLOBAL RATES – POWER USERS ONLY

Power Users should notice that the input part of the form will be blank and ready for input when the form is accessed after setting user variables.

Global Fringe Rate Input ⓘ							
Years 2019 - 2020	Scenario Budget	Version Input					
			Faculty/Academic Fringe Rate	University Staff Fringe Rate	LTE Fringe Rate	GA Fringe Rate	Student Fringe Rate
No Fund							
---- ADJUST FUND RATES BY STAFF TYPE BELOW ----							
131 - Academic Student Fees							
189 - Extension Student Fees							
231 - Acad Stu Fees Carryforward Contributions							
128 - Auxiliary Enterprises							
228 - Auxiliary Enterprises - Capital Projects							

Step 2.

Enter the desired Fringe Rates by Staff Type.

Global Fringe Rate Input ⓘ								
Years 2019 - 2020	Scenario Budget	Version Input	Department Eau Claire Fringe Rates					
				Faculty/Academic Fringe Rate	University Staff Fringe Rate	LTE Fringe Rate	GA Fringe Rate	Student Fringe Rate
No Fund				33%	43%	12%	21%	3%
---- ADJUST FUND RATES BY STAFF TYPE BELOW ----								
131 - Academic Student Fees								
189 - Extension Student Fees								
231 - Acad Stu Fees Carryforward Contributions								

Step 3.

Click **SAVE** and click **OK** when the confirmation pop up window appears.

Global Fringe Rate Input

Years: 2019 - 2020 | Scenario: Budget | Version: Input | Department: Eau Claire Fringe Rates

Information: The data has been saved. OK

	Faculty/Academic Fringe Rate	University Staff Fringe Rate	LTE Fringe Rate	GA Fringe Rate	Student Fringe Rate
No Fund	33%	43%	12%	21%	3%
---- ADJUST FUND RATES BY STAFF TYPE BELOW ----					
131 - Academic Student Fees					
189 - Extension Student Fees					
231 - Acad Stu Fees Carryforward Contributions					
128 - Auxiliary Enterprises					
228 - Auxiliary Enterprises - Capital Projects					
136 - General Operations Receipts					
150 - Fed aid - Federal Indirect Cost Reimbursement					
133 - Non-Federal Grants and Contracts					
134 - Gifts - Student Loans					
135 - Gifts & Donations - WARF					
142 - Fed aid - Hatch Adams - Land Grant Research					
143 - Fed aid - Smith Lever - Land Grant Extension					

Step 4.

From the Actions drop down, select the **Apply Fringe Rates to Funds** option. This will populate all the rates for all funds and staff types.

Global Fringe Rate Input

Years: 2019 - 2020 | Scenario: Budget | Version: Input | Department: Eau Claire Fringe Rates

Actions: Apply Fringe Rates to Funds, Push Rates by Fund, Filter, Analyze, New Ad Hoc Grid, Predictive Planning, Business Rules, Smart Push Details, Grid Validation Messages, Clear Formatting, Spreadsheet Export, Open in Smart View

	Faculty/Academic Fringe Rate	University Staff Fringe Rate	LTE Fringe Rate	GA Fringe Rate	Student Fringe Rate
No Fund	33%	43%	12%	21%	3%
---- ADJUST FUND RATES BY STAFF TYPE BELOW ----					
131 - Academic Student Fees					
189 - Extension Student Fees					
231 - Acad Stu Fees Carryforward Contributions					
128 - Auxiliary Enterprises					
228 - Auxiliary Enterprises - Capital Projects					
136 - General Operations Receipts					
150 - Fed aid - Federal Indirect Cost Reimbursement					
133 - Non-Federal Grants and Contracts					
134 - Gifts - Student Loans					
135 - Gifts & Donations - WARF					
142 - Fed aid - Hatch Adams - Land Grant Research					
143 - Fed aid - Smith Lever - Land Grant Extension					

Global Fringe Rate Input					
Years	Scenario	Version	Department		
2019 - 2020	Budget	Input	Eau Claire Fringe Rates		
				Faculty/Academic Fringe Rate	University Staff Fringe Rate
				LTE Fringe Rate	GA Fringe Rate
				Student Fringe Rate	
No Fund				33%	43%
---- ADJUST FUND RATES BY STAFF TYPE BELOW ----				12%	21%
131 - Academic Student Fees				3%	
189 - Extension Student Fees					
231 - Acad Stu Fees Carryforward Contributions					
128 - Auxiliary Enterprises					
228 - Auxiliary Enterprises - Capital Projects					

Step 5. CONTINUE TO CHANGE FRINGE RATES BY FUND IF NEEDED

To change Fringe rates by specific funds, click on the populated rates and update to the desired rate. This will mark the cell yellow to indicate that a change has been made and it is **not saved yet**.

Global Fringe Rate Input ⓘ							
Years 2019 - 2020	Scenario Budget	Version Input	Department Eau Claire Fringe Rates				
			Faculty/Academic Fringe Rate	University Staff Fringe Rate	LTE Fringe Rate	GA Fringe Rate	Student Fringe Rate
No Fund			33%	43%	12%	21%	3%
---- ADJUST FUND RATES BY STAFF TYPE BELOW ----							
131 - Academic Student Fees			30%	43%	12%	21%	3%
189 - Extension Student Fees			33%	43%	18%	21%	3%
231 - Acad Stu Fees Carryforward Contributions			33%	43%	12%	21%	0%
128 - Auxiliary Enterprises			33%	38%	12%	19%	3%
228 - Auxiliary Enterprises - Capital Projects			33%	43%	12%	19%	3%
136 - General Operations Receipts			33%	43%	12%	25%	3%
150 - Fed aid - Federal Indirect Cost Reimbursement			33%	43%	12%	21%	3%

Step 6.

Click on SAVE to save the changes made. Remember that this will turn the cells from yellow to white indicating that the changes have been made.

Global Fringe Rate Input ⓘ

Years

Scenario

Version

Department

2019 - 2020

Budget

Input

Eau Claire Fringe Rates

Step 7.

Finalize by selecting **Actions** and **Push Rates by Fund**.

Global Fringe Rate Input							
Years 2019 - 2020	Scenario Budget	Version Input	Department Eau Claire Fringe Rates				
			Faculty/Academic Fringe Rate	University Staff Fringe Rate	LTE Fringe Rate	GA Fringe Rate	Student Fringe Rate
No Fund			33%	43%	12%	21%	3%
---- ADJUST FUND RATES BY STAFF TYPE BELOW ----							
131 - Academic Student Fees			33%	43%	12%	21%	3%

Apply Fringe Rates to Funds

Push Rates by Fund

Filter

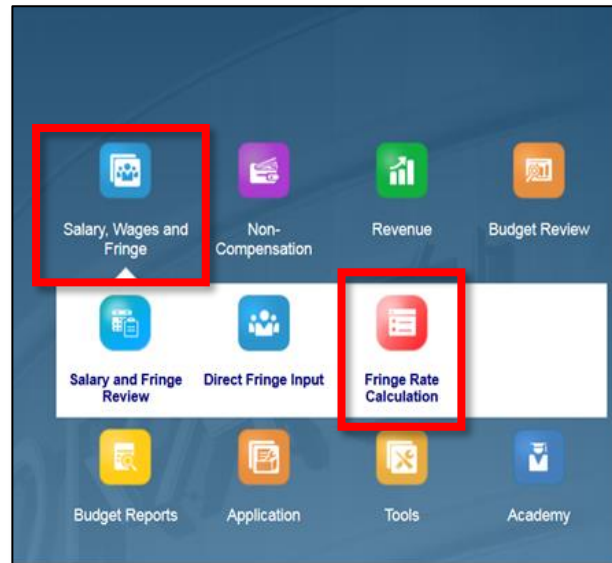
Analyze

New Ad Hoc Grid

Fringe Input Rates Process

Step 1.

From the **Home** page, click on the **Salary, Wages, and Fringe** cluster, and click on the **Fringe Rate Calculation** option.



Step 2.

Navigate to the **Fringe Rate Adj and Review** vertical tab and ensure that the form is in the **Faculty/Academic** form.

Faculty/Academic University Staff LTE Grad Assistant Student All Positions							
Faculty Academic Fringe Adjustment ⓘ							
Fund	Program	Project					
131 - Academic Student Fees	0 - Student Services	No Projects Eau Claire					
	2019 - 2020	2019 - 2020	2019 - 2020	---	2019 - 2020	2019 - 2020	---
	Budget	Budget	Budget	---	Budget	Budget	Budget
	Input	Input	Input	---	Adjustment	Working	Adjusted
	YearTotal	BegBal	YearTotal	---	YearTotal	YearTotal	---
	Faculty/Acad Salary Total	Faculty/Academic Fringe Rate	Faculty/Acad Fringe PlanUW	---	Faculty/Acad Fringe PlanUW	Faculty/Acad Fringe PlanUW	Faculty/Academic Fringe Rate
043071 - BCDT - FINANCIAL AID (EAU)	50127	30%					
052072 - BCDT - CAREER SERVICES (EAU)	103067	30%					

Step 3.

To begin, enter the desired Fund, Program, and Project if needed and ensure it is displayed before continuing.

	2018 - 2019	2018 - 2019	2018 - 2019		2018 - 2019	2018 - 2019	
	Budget	Budget	Budget		Budget	Budget	Budget
	Input	Input	Input		Adjustment	Working	Adjusted
	YearTotal	BegBal	YearTotal		YearTotal	YearTotal	
	Faculty/Acad Salary Total	Faculty/Academic Fringe Rate	Faculty/Acad Fringe PlanUW		Faculty/Acad Fringe PlanUW	Faculty/Acad Fringe PlanUW	Faculty/Academic Fringe Rate
841000 - Parking Fee-Traffic Fine (RVF)	41971	18%					
892000 - Dining Service (RVF)	111531	18%					
821005 - Carding Office (RVF)	5202	18%					
891030 - Conf & Events - Univ Center (RVF)	4162	18%					
851000 - Residence Life (RVF)	556346	18%					
All Orgs (RVF)	598317						


Step 4.

Enter the rate in the appropriate department by using **decimal points for percentage**. Once done, click **SAVE** and **OK** in the pop up.

	2018 - 2019	2018 - 2019	2018 - 2019		2018 - 2019	2018 - 2019	
	Budget	Budget	Budget		Budget	Budget	Budget
	Input	Input	Input		Adjustment	Working	Adjusted
	YearTotal	BegBal	YearTotal		YearTotal	YearTotal	
	Faculty/Acad Salary Total	Faculty/Academic Fringe Rate	Faculty/Acad Fringe PlanUW		Faculty/Acad Fringe PlanUW	Faculty/Acad Fringe PlanUW	Faculty/Academic Fringe Rate
841000 - Parking Fee-Traffic Fine (RVF)	41971	18%					
892000 - Dining Service (RVF)	111531	18%					
821005 - Carding Office (RVF)	5202	12%					
891030 - Conf & Events - Univ Center (RVF)	4162	18%					
851000 - Residence Life (RVF)	556346	23%					
All Orgs (RVF)	598317						

Step 5. TO REVIEW FRINGE USING RATES CALCULATION

Continue to click on the “**Consolidated Review**” vertical tab. Validate that the Fringe amounts calculated are correct (Below is only an example)

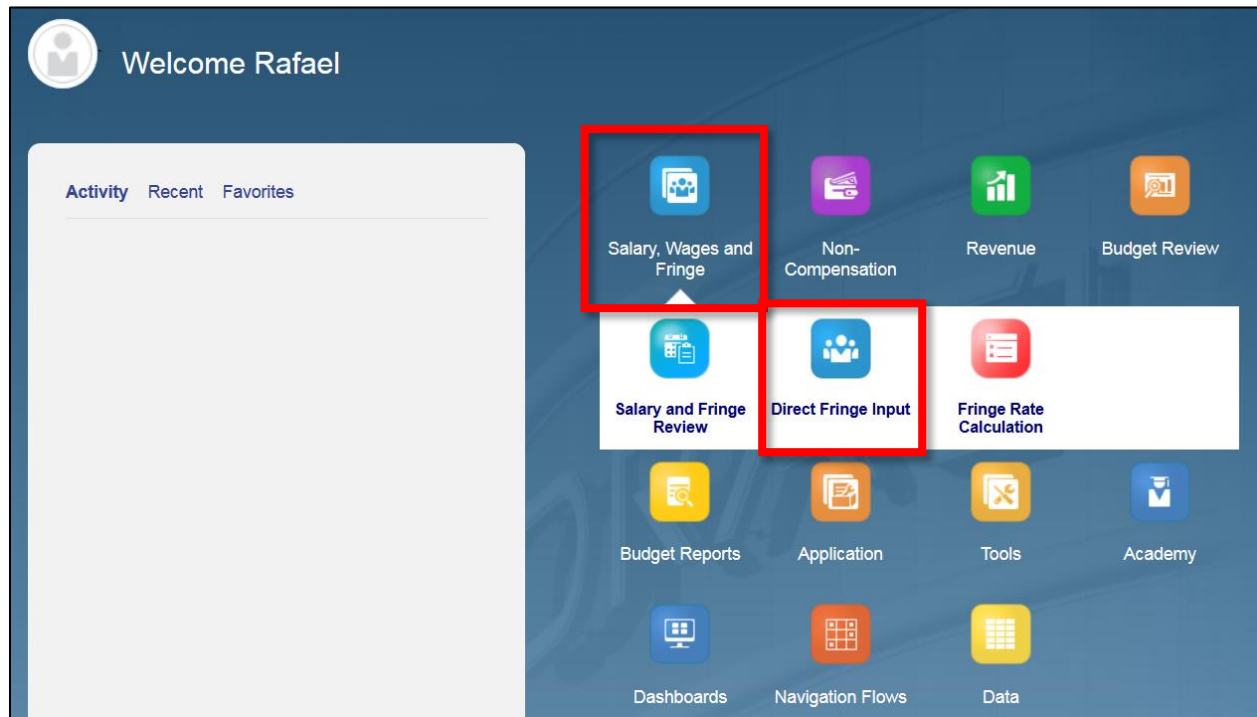
Consolidated Review Yearly Trend ⓘ									
Department UW EAU TOP (EAU)		Fund 131 - Academic Student Fees		Project No Projects Eau Claire					
		2016 - 2017	2017 - 2018	2018 - 2019	2018 - 2019	2018 - 2019	2019 - 2020	2019 - 2020	
		Actual	Actual	Actual	Budget	Budget	Budget	CY vs. PY Budget (\$)	
		Final	Final	Final	Final	Revised Budget	Working	Working	
		Total Year	Total Year	Aug YTD	Total Year	Total Year	Total Year	Total Year	
Program Total	Revenue	73,300,582	74,189,120	4,509,840					
Program Total	Permanent FTE						41	41	
Program Total	Graduate Asst FTE								
Program Total	Salary	5,352,640	5,307,325	1,455,433	3,622,150	3,622,150	3,100,792	(512,368)	
Program Total	Fringe	1,663,545	1,678,406	404,501	1,447,881	1,447,881	36,651	(1,411,230)	
Program Total	Salary, Wages & Fringe	7,016,184	6,985,731	1,859,935	5,070,031	5,070,031	3,137,443	(1,923,598)	
Program Total	Supplies and Expense	1,116,800	1,014,828	123,380	604,055	604,055		(604,055)	
	Capital Expense	53,750	2,188						
	Aid to Individuals & Organizations	3,126,236	3,114,358	2,818	3,438,720	3,438,720		(3,438,720)	
	Special Purpose								
	Debt Service								
	Sales Credits								
Program Total	Non Salary & Wages	4,296,787	4,131,374	126,198	4,042,775	4,042,775		(4,042,775)	

Input Fringe Data



Step 1.

To begin, click on the **Salary, Wages, and Fringes** cluster. Then, click on the **Direct Fringe Input** tile.



Step 2.

To begin, the form should automatically populate in **By Department**. This example will input at **Level 3 (the User can input at all levels, however)**. Check the POV and update accordingly if needed.

1	By Department	By Program	By Department and Program	Input Review	Trend Review	PA Review
2	Fringe Budget by Dept (L3)					
3	Fund	Program	Project			
4	102 - GPO - Non-Doctoral Cluster	2 - Instruction	No Project			
				2016 - 2017	2017 - 2018	2017 - 2018
				Actual	Actual	Budget
				Total Year	Total Year	Y-T-D(Jun)
	320003 - CACHSS-Academic Support (STO)	Fac/Acad Misc Fringe PlanUW				
		FICA PlanUW				
	321001 - School of Art & Design (STO)	Fac/Acad Misc Fringe PlanUW				
		Univ Staff Misc Fringe PlanUW				
		LTE Misc. Fringe PlanUW				
		Misc. Fringe PlanUW				
		FICA PlanUW				
	1921 - Group Health Insurance - ER			7740	20674	20674

Step 3.

Enter the data in the Total Year column and use the Comments column if needed. Click SAVE once done and OK on the pop up.

By Department By Program By Department and Program Input Review Consolidated Review									
Fringe Budget by Dept (L3)									
Fund		Program		Project					
102 - GPO - Non-Doctoral Cluster		2 - Instruction		No Project					

Inserting Wedges

What is a Wedge?

Wedges (Open Budget Accounts Menu) are inserted when an account intersection does not have prior years of actuals. A wedge is inserted to allow users to budget for that intersection.

- An example of this is when a new department is created. Because new departments do not have any prior year actual data and will not show up on a form, a wedge is inserted with already existing department information.

- Inserting a wedge (or Opening Budget Accounts) opens accounts to be budgeted to.

Step 1.

To insert a wedge:

1. Click on the Pencil icon (Edit)
2. Select a fund that had no prior year actuals data.
3. Click on Apply.
4. Remember that no prior year data exists. Because of this, no data will be displayed.

The screenshot shows the 'Fringe Budget by Dept (L3)' form. The breadcrumb trail at the top reads: 'By Department | By Program | By Department and Program | Input Review | Consolidated Review'. The form displays a table with columns for years: 2015 - 2016, 2016 - 2017, 2017 - 2018, and 2018 - 2019. The rows are labeled 'Actual' and 'Total Year'. A red box highlights the 'Apply' button, and a red circle highlights the 'Edit' (pencil) icon in the top right corner.

The screenshot shows the 'Fringe Budget by Dept (L3)' form after clicking 'Apply'. The table now includes a 'Budget' column for 2018 - 2019. A red box highlights the empty data area, and a red circle highlights the 'Apply' button.

Step 2.

- Under the **Actions** drop down, click on **Open Budget Accounts** and enter the Department to budget to using the metadata dropdown. Then, click **Launch**.

The top screenshot shows the 'Fringe Budget by Dept (L3)' page. The 'Actions' dropdown menu is open, and 'Open Budget Accounts' is highlighted. The page displays a table with columns for years (2015-2016 to 2018-2019) and rows for Actual, Budget, and Total Year. The bottom screenshot shows the 'Insert_Wedge_Comp_L3' dialog box. The 'Select Department' field is set to 'Eau_0316_ATHLETICS'. The 'Select Project' field is set to 'No_Project' and the 'Select Fund' field is set to 'F_102'.

Step 3.

The Department selected on step 2 of the previous slide should now appear along with a column for all Level 3 Accounts. The user now can enter data in the Total Year and Comments columns and continue to click Save when done.

The screenshot shows the 'Fringe Budget by Dept (L3)' page. The 'Eau_0316_ATHLETICS' department is selected, and the 'Total Year' and 'Comments' columns are highlighted. The table displays data for the years 2015-2016 to 2018-2019. The 'Total Year' column is highlighted in red, and the 'Comments' column is highlighted in red.

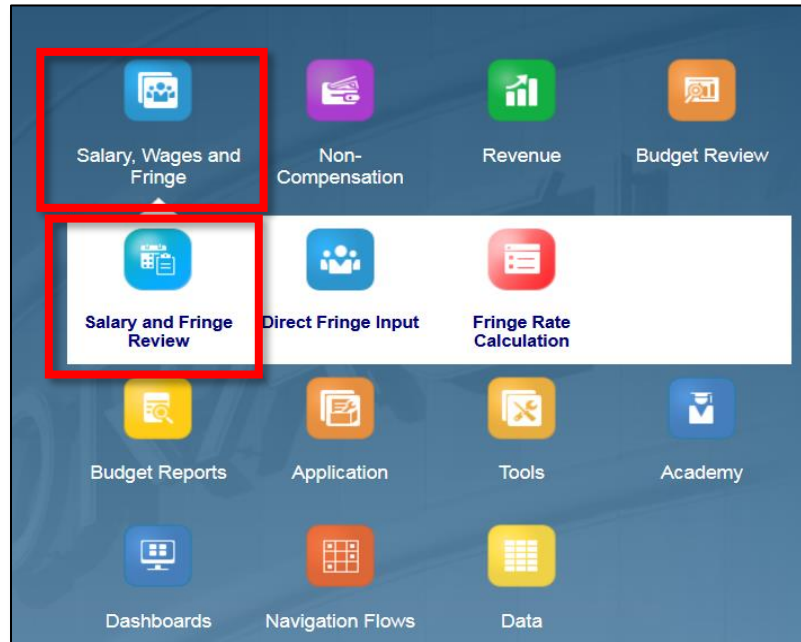


Please continue to the ANNEX section (Page 95) for further options on inserting wedges.

Reviewing Fringe Data

Step 1.

To begin the fringe data review process, Click the **Salary, Wages and Fringe** cluster and Click on the **Salary and Fringe Review** to open the form



Step 2.


Select the **Input Review** tab to confirm that the Actual Data columns look correct, review previously entered data in Fringe Input Data process and review rolled up data and validate it is correct.

1

2

3

4



By Department | By Program | By Department and Program | By Project | By Proj. Dept and Program | **Input Review** | Trend Review | PA Review

Consolidated Review Yearly Trend

Department

BUSINESS_AFFAIRS - Business Affairs (RVF)

Fund

Fund Total

Project

No Project

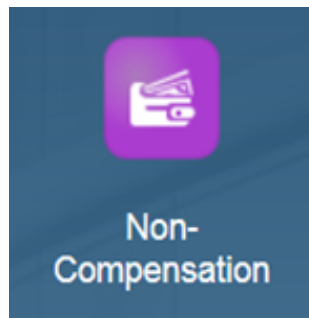
Data

Ad hoc

Format

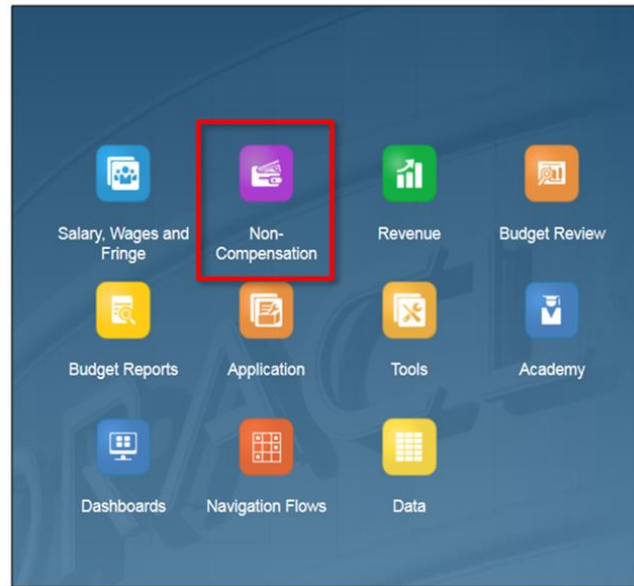
		2015 - 2016	2016 - 2017	2017 - 2018	2017 - 2018	2017 - 2018	2018 - 2019		
		Actual	Actual	Actual	Budget	Budget	Budget	PA - Budget Allocation	Allocation Target vs Budget (\$)
		Final	Final	Final	Final	Revised Budget	Working		
		Total Year	Total Year	Jan YTD	Total Year	Total Year	Total Year	Total Year	Total Year
Program Total	Revenue	-23954871	-39426853	-19675948					
Program Total	Permanent FTE						29		
	Graduate Asst FTE								
Program Total	Salary	866823	1695342	762152			2024531		
	Fringe	337893	718328	321776			7555		
Program Total	Salary, Wages & Fringe	1204716	2413670	1083928			2032086		
Program Total	Supplies and Expense	560078	1372880	477784			241521		

Input Non-Compensation Data



A few things to consider before beginning the Non Compensation Input process:

- This input process can take place at all **three** levels.
- At all three levels, the input process can take place by:
 - By Department
 - By Program
 - By Department & Program
 - By Project
 - By Project, Department & Program (Madison only)
- This guide will cover the Non-Compensation Input process at **Level 1** and it will cover it By Department, By Program, By Department & Program, By Project and By Project, Department & Program. This will be followed by an Input Review section.



Step 1.

To begin the Non-Compensation tile to open the spreadsheet.

Step 2. Non Comp Input Process – [L1] – By Department

By default, the form will open on Level 1 and By Department. To edit, click on the Edit – Pencil button:

1. Select the **Fund**
2. **Program**
3. **Project** with prior year data.

4. Click on **Apply** once done

Step 3. Non Comp Input Process – [L1] – By Department

1. Ensure that the correct budget accounts are displayed.
2. Confirm that the current year (2017-2018) is **read-only** (Grey)
3. The **next fiscal year budget and comment columns** should be available for input. Enter data and comments, and click **Enter** once done. This should turn the cells **yellow**.
4. Click **Save** once done.



At this point, the user can continue to insert a wedge if needed. To insert a wedge, return to the INSERTING WEDGES section or click [HERE](#).

Step 1. Non Comp Input Process – [L1] – By Program

The process of budgeting By Program follows the same steps than the process of budgeting By Department:

1. Select your appropriate Fund and Project using the Point of View Member Selection OR using the pencil.
2. Input Data into several Programs
3. Save Data

By Department | **By Program** | By Department and Program | By Project | By Proj, Dept and Prgm | Input Review | Trend Review | PA Review

NonComp Budget by Prgm (L1) ⓘ

Department		Fund	Project			
701000 - Library-Genl OperationsSupport (PLT)		102 - GPO - Non-Doctoral Cluster	Platteville No Project			
		2018 - 2019	2019 - 2020	2019 - 2020		
		Budget	Budget	Budget		
		Total Year	Total Year	Comments		
Travel/Train/Recruit PlanUW	6 - Academic Support					
Maint & Repairs PlanUW	6 - Academic Support					
Supplies PlanUW	6 - Academic Support		400			
Services PlanUW	6 - Academic Support		400			
Misc Expense PlanUW	6 - Academic Support					
Misc Capital Expense PlanUW	6 - Academic Support		200	Comment		

Actions Save Refresh

Data Ad Hoc Format

1 2 3



At this point, the user can continue to insert a wedge if needed. To insert a wedge, return to the INSERTING WEDGES section or click [HERE](#).

Step 1. Non Comp Input Process – [L1] – By Department & Program

To conduct a Non Comp Input By **Department and Program**, navigate to the **By Department and Program Form**

Non-Compensation Revenue Budget Review Budget Reports Academy Dashboards Navigation Flows

1 By Department | By Program | **By Department and Program** | By Project | By Proj. Dept and Prgm | Input Review | Trend Review | PA Review

NonComp Budget by Dept (L1)

2 Fund 102 - GPO - Non-Doctoral Cluster Program 6 - Academic Support Project Platteville No Project

3

2018 - 2019	2019 - 2020	2019 - 2020
Budget	Budget	Budget
Total Year	Total Year	Comments

701000 - Library-Genl OperationsSupport (PLT) Travel/Train/Recruit PlanUW

Step 2. Non Comp Input Process – [L1] – By Department & Program

1. 'Select your appropriate Fund and Project using the Point of View Member Selection OR using the pencil as demonstrated in previous steps.
2. 'Enter data into several Programs or Accounts
3. Click Save.

By Department | By Program | **By Department and Program** | By Project | By Proj. Dept and Prgm | Input Review | Trend Review | PA Review

NonComp Budget by Dept and Prgm (L1)

Fund 102 - GPO - Non-Doctoral Cluster Project Platteville No Project

1

2018 - 2019 2019 - 2020 2019 - 2020

Budget Budget Budget

Total Year Total Year Comments

701000 - Library-Genl OperationsSupport (PLT) 6 - Academic Support Travel/Train/Recruit PlanUW

Maint & Repairs PlanUW 300

Supplies PlanUW 200

Services PlanUW 400 Comment

Misc Expense PlanUW

Misc Capital Expense PlanUW 200 Comment

2

3

Save Refresh

Data Ad hoc Format




At this point, the user can continue to insert a wedge if needed. To insert a wedge, return to the INSERTING WEDGES section or click [HERE](#).

Step 1. Non Comp Input Process – [L1] – By Project

All pods also have a form with Projects in the rows. To adjust the POV in this form:

1. Select the **Department** to adjust the member via the Member Selector.
2. Select the **Fund** to adjust the member via the Member Selector.
3. Select the **Program** to adjust the member via the Member Selector.



By Department | By Program | By Department and Program **By Project** | By Proj, Dept and Prgm | Input Review | Trend Review | PA Review

NonComp Budget by Proj (L1)

Department	Fund	Program
011095 - UNIVERSITY ADMIN*OFFCL FNCT (MSN)	136 - General Operations Receipts	1 - Institutional Support

	2018 - 2019	2019 - 2020	2019 - 2020
Budget	Budget	Budget	
Total Year	Total Year	Comments	

No Projects Madison

Travel/Train/Recruit PlanUW

Supplies PlanUW

Services PlanUW

Misc Expense PlanUW



At this point, the user can continue to insert a wedge if needed. To insert a wedge, return to the INSERTING WEDGES section or click [HERE](#).

Step 1. Non Comp Input Process – [L1] – By Proj, Dept and Prgm

In the Madison pod there is an addition form By Proj, Dept and Prgm to facilitate data entry. To adjust the POV for this form:

1. Select the **Fund** to adjust the member via the Member Selector.

By Department | By Program | By Department and Program | By Project | **By Proj, Dept and Prgm** | Input Review | Trend Review | PA Review

NonComp Budget by Proj, Dept and Prgm (L1)

Fund
136 - General Operations Receipts

					2018 - 2019	2019 - 2020	2019 - 2020
					Budget	Budget	Budget
					Total Year	Total Year	Comments
No Projects Madison	011020 - UNIVERSITY ADMIN*PROVOST (MSN)	1 - Institutional Support	Services PlanUW				
			Travel/Train/Recruit PlanUW				
			Supplies PlanUW				
			Misc Expense PlanUW				
	011029 - UNIVERSITY ADMIN*GLOBAL HEALTH (MSN)	5 - Public Service	Travel/Train/Recruit PlanUW				
			Sales Credits PlanUW				
	011095 - UNIVERSITY ADMIN*OFFCL FNCT (MSN)	1 - Institutional Support	Travel/Train/Recruit PlanUW				
			Supplies PlanUW				
			Services PlanUW				
			Misc Expense PlanUW				



At this point, the user can continue to insert a wedge if needed. To insert a wedge, return to the INSERTING WEDGES section or click [HERE](#).

Reviewing Non Compensation Data

The last three tabs offer the option to conduct reviews from different perspectives:

- Input Review
- Trend Review
- PA Review level (Covered later in this QRG)

1	By Department By Program By Department and Program By Project By Proj, Dept and Prgr Input Review Trend Review PA Review							
2	NonComp Rollup Review (L1) ⓘ							
3	Department	Fund	Program	Project				
	088835 - COEHS EDD Program (OSH)	131 - Academic Student Fees	2 - Instruction	No Projects Oshkosh				
		2016 - 2017	2017 - 2018	2018 - 2019	2018 - 2019	2019 - 2020	2019 - 2020	2019 - 2020
		Actual	Actual	Actual	Budget	Budget	CY vs. PY Budget (\$)	Budget
		Total Year	Total Year	Y-T-D(Aug)	Total Year	Total Year	Total Year	Comments
	Revenue	88,900	77,723	26,383				
	Salary	29,994	62,337	7,644	69,500	69,500	0	
	Fringe	8,940	17,133	1,017	20,714		20,714	
	Salary, Wages & Fringe	38,934	79,470	8,661	90,214	69,500	20,714	
	3790 - Material for Resale							
	Travel/Train/Recruit PlanUW							

BEFORE CONTINUING - IMPORTANT



Remember that input forms for each level will be **unsuppressed for Input Review**. This means that input review forms at Level 1 **will just contain Level 1 accounts**. Level 2, however, **will have Level 1 and 2 accounts**, and Input Review form at Level 3 will contain **Level 1, 2 and 3 accounts**. HOWEVER, the input review forms in the last section will be **suppressed** to only show areas that have been budgeted in or had actuals in the past.

NonComp Rollup Review (L3)

Department: 070001 - CALS EXTR FDS*FB EXTR FDS (MSN) Fund: 136 - General Operations Receipts Program: 0 - Student Services Project: No Projects Madison

	2016 - 2017	2017 - 2018	2018 - 2019	2018 - 2019	2019 - 2020	2019 - 2020	2019 - 2020
	Actual	Actual	Actual	Budget	Budget	CY vs. PY Budget (\$)	Budget
	Final	Final	Final	Final	Final	Input	Input
	Total Year	Total Year	Y-T-D(Aug)	Total Year	Total Year	Total Year	Comments
Level 1 2895 - Event - Meeting Space							
Level 1 2896 - Travel Agency Service Fees							
Level 1 2899 - Travel - Reduction							
Level 2 Non-Training PlanUW							
Level 3 Travel/Train/Recruit PlanUW							

Unsuppressed

NonComp Rollup Review by Dept

Fund: 136 - General Operations Receipts Program: 0 - Student Services Project: No Projects Madison

	Final	Final	Final	Final	Input	Input
	2016 - 2017	2017 - 2018	2018 - 2019	2018 - 2019	2019 - 2020	2019 - 2020
	Actual	Actual	Actual	Budget	Budget	Budget
	Year Total	Year Total	Y-T-D(Aug)	Year Total	Total Year	Comments
070600 - CALS ACAD AFFAIRS*CALS ACAD AF (MSN)						
Salary		3,210				
Fringe		246				
Salary, Wages & Fringe		3,455				
2670 - Printing & Duplicating-State		905	1,513			
Printing & Duplicating PlanUW						

Unlike the other general input forms, Users will not be able to use the “account drop downs” or “Open Budget Accounts” in any of these forms.

	2018 - 2019	2019 - 2020	2019 - 2021
	Budget	Budget	Budget
	Total Year	Total Year	Comment
070600 - CALS ACAD AFFAIRS*CALS ACAD AF (MSN)	Services PlanUW	Select Member	
	Misc Expense PlanUW	Search	
		Name	
		Travel/Train/Recruit PlanUW	
		Maint & Repairs PlanUW	



Actions ▼

Save

Refresh



Open Budget Accounts

Step 1. Input Review

1. Confirm the Actual numbers are correct
2. Confirm Prior year budget amount by Major Class
3. Locate your Data entered within the input forms to see how the data rolls up to the Major Class

NonComp Rollup Review (L1) ⓘ						
Department	Fund		Program	Project		
117200 - Nursing-Undergrad Programs (OSH)	102 - GPO - Non-Doctoral Cluster		2 - Instruction	No Project		
	2015 - 2016	2016 - 2017	2017 - 2018	2017 - 2018	2018 - 2019	Years
	Actual	Actual	Actual	Budget	Budget	CY vs. PY Budget (\$)
	Total Year	Total Year	Y-T-D(Jun)	Total Year	Total Year	Total Year
Revenue	2,421,757.6	2,176,623	260,112	255,173	315,639	(60,467)
Salary	1,702,697	1,754,693	312,064	199,077	1,928,686	(1,729,609)
Fringe	688,344	775,521	176,004	66,129	135,671	(69,543)
▢ Salary, Wages & Fringe	2,391,041	2,530,214	488,069	265,206	2,064,357	(1,799,152)
Travel/Training/Recruiting PlanUW					50	(50)
▢ Travel/Training/Recruiting	473		3,672	3,562	4,456	(894)
Maint & Repairs PlanUW					50	(50)
▢ Maint & Repairs	53	39	381	369	507	(138)
Supplies PlanUW					50	(50)
▢ Supplies	19,826	9,412	10,591	7,890	9,809	(1,920)
Services PlanUW					50	(50)
▢ Services	8,160	8,528	2,005	243	350	(108)
Miscellaneous Expense PlanUW					1,000	(1,000)

Step 2.

Make changes to any data in an editable cell and continue to **Save**.

NonComp Rollup Review (L1) ⓘ							
Department	Fund		Program	Project			
117200 - Nursing-Undergrad Programs (OSH)	102 - GPO - Non-Doctoral Cluster		2 - Instruction	No Project			
	2015 - 2016	2016 - 2017	2017 - 2018	2017 - 2018	2018 - 2019	Years	2018 - 2019
	Actual	Actual	Actual	Budget	Budget	CY vs. PY Budget (\$)	Budget
	Total Year	Total Year	Y-T-D(Jun)	Total Year	Total Year	Total Year	Comments
Revenue	2,421,758	2,176,623	260,112	255,173	315,639	(60,467)	
Salary	1,702,697	1,754,693	312,064	199,077	1,928,686	(1,729,609)	
Fringe	688,344	775,521	176,004	66,129	135,671	(69,543)	
▢ Salary, Wages & Fringe	2,391,041	2,530,214	488,069	265,206	2,064,357	(1,799,152)	
Travel/Training/Recruiting PlanUW					50	(50)	
▢ Travel/Training/Recruiting	473		3,672	3,562	4,456	(894)	
Maint & Repairs PlanUW					50	(50)	
▢ Maint & Repairs	53	39	381		507	(138)	
Supplies PlanUW					160	(50)	addl supplies
▢ Supplies	19,826	9,412	10,591	7,890	9,809	(1,920)	
Services PlanUW					200	(50)	addl services
▢ Services	8,160	8,528	2,005	243	350	(108)	
Miscellaneous Expense PlanUW					1,000	(1,000)	Budget more in Misc

Step 3. Trend Review

To conduct a **Trend Review**, once in the Consolidated Review tab, click on the **Trend Review** tab

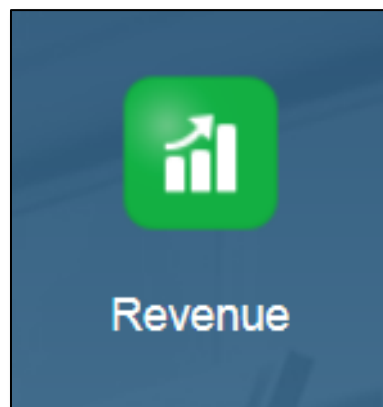
By Department By Program By Department and Program By Project By Proj. Dept and Prgm Input Review Trend Review PA Review						
Consolidated Review Yearly Trend						
Department 701000 - Library-Genl OperationsSupport (PLT)	Fund 102 - GPO - Non-Doctoral Cluster	Project Platteville No Project				
			2016 - 2017	2017 - 2018	2018 - 2019	2019 - 2020
			Actual	Actual	Actual	Budget
			Final	Final	Final	Revised Budget
			Total Year	Total Year	Aug YTD	Total Year
Program Total	Revenue			1168781		
Program Total	Permanent FTE					14
Program Total	Graduate Asst FTE					
Program Total	Salary		698382	703987	118047	767320
Program Total	Fringe		364726	339678	74313	767320
Program Total	Salary, Wages & Fringe		1063108	1043665	192360	766044
Program Total	Supplies and Expense		115177	125116	26893	97287

Step 4.

1. Review the Actual data.
2. View the current fiscal year's Redbook Budget
3. View the current fiscal year's Revised Budget
4. Validate the Budget entered from the input forms
5. Validate the Working vs. Redbook Budget Variance

Consolidated Review Yearly Trend						
Department 53 - MEDICAL SCHOOL (MSH)	Fund GPR/Tuition	Project Project Total				
			2016 - 2017	2017 - 2018	2018 - 2019	2019 - 2020
			Actual	Actual	Actual	Budget
			Final	Final	Final	Revised Budget
			Total Year	Total Year	Aug YTD	Total Year
Program Total	Revenue			79287871		
Program Total	Permanent FTE					656
Program Total	Graduate Asst FTE					
Program Total	Salary		55466390	57655782	9798286	59274649
Program Total	Fringe		19487982	19889908	4063814	19249
Program Total	Salary, Wages & Fringe		74954372	77545690	13862100	59293898
Program Total	Supplies and Expense		4937595	5449133	1340513	6241203
Program Total	Capital Expense		60321	236825	10451	1658189
Program Total	Aid to Individuals & Organizations		1230183	1320187	536143	1330888
Program Total	Special Purpose		1061	993		0
Program Total	Debt Service					
Program Total	Sales Credits		-4821209	-5264957	-914631	-4563172
Program Total	Non Salary & Wages		1407952	1742181	972476	4667108

Input Revenue Data



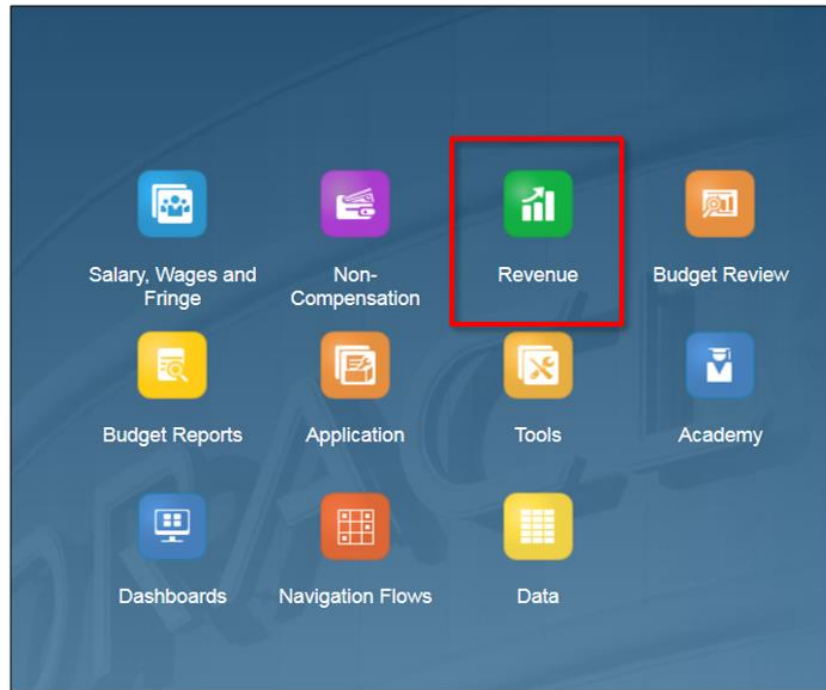
A few things to consider before beginning the Revenue Input process:

- This input process can take place at all three levels.
- At all three levels, the input process can take place by:
 - By Department
 - By Program
 - By Department & Program

This guide will cover the Revenue Input process at Level 1 and it will cover it By Department, By Program, and By Department & Program. This will be followed by an Input Review section

Step 1.

To begin the input process for Revenue click the **Revenue** tile to open the spreadsheet.



Step 2. By Department

The form will automatically display data **By Department**. For this example, as in previous steps, select a Fund, Program, and Project that has prior year actual data.

NOTE: To update the Fund information, click on **Fund**. The options to update the fund are shown next

By Department By Program By Department and Program By Project Input Review Consolidated Review						
Rev Budget by Dept (L1) ⓘ						
Fund		Program		Project		
102 - GPO - Non-Doctoral Cluster		2 - Instruction		No Project		
				2017 - 2018	2018 - 2019	2018 - 2019
				Budget	Budget	Budget
				Total Year	⊕ Total Year	Commer
Select Department				Select Account		

Step 3. Updating POV if Needed

Select the desired Fund, Fund Total, and specific Fund Total by selecting the **checkmark** icon. Continue to click OK. Ensure that the selected Fund is highlighted. Click on the Forward Arrow to execute the form.

Select a Member

Fund
*101 - GPO - Doctoral Cluster

Search Fund

Fund Total
GPR/Tuition
TUI
TB
AUX
OP REC
FICR
GOC
OTHER
FFA

101 - GPO - Doctoral Cluster
102 - GPO - Non-Doctoral Clus...
103 - GPO - Colleges
104 - GPO - Extension Programs
106 - GPO - System Wide
109 - Energy Costs
110 - Principal Repayment and...
112 - Grants to Meet Emergenc...
116 - Tommy G. Thompson Cente...
117 - State Laboratory of Hyg...

Members Fund> Fund Total> GPR/Tuition> 101 - GPO - Doctoral Cluster

Continue to complete this step again for the **Program** and **Project** option, if needed.

By Department | By Program | By Department and Program | By Project | Input Review | Consolidated Review

Rev Budget by Dept (L1)

Fund 101 - GPO - Doctoral Cluster Program 2 - Instruction Project No Project

Actions Save Refresh

Data Ad hoc Format



Remember! You can also change the POV by clicking on the pencil.

Step 4. By Department

Continue to enter **data** and **comments**. Click **Save** and **OK** when the pop-up appears.

By Department | By Program | By Department and Program | By Project | By Proj, Dept and Prgm | Input Review | Trend R

Rev Budget by Dept (L1)

Fund 131 - Academic Student Fees Program 2 - Instruction Project No Projects Oshkosh

	2018 - 2019	2019 - 2020	2019 - 2020
	Budget	Budget	Budget
Total Year	Total Year	Comments	
030122 - CAPP COLS (OSH)	Misc. Revenue PlanUW	75,000	Training
030202 - COLS Program Development (OSH)	Misc. Revenue PlanUW		
031005 - Summer CAPP (OSH)	Misc. Revenue PlanUW		

Fund	Program	Project	2018 - 2019	2019 - 2020	2019 - 2020
131 - Academic Student Fees	2 - Instruction	No Projects Oshkosh			
030122 - CAPP COLS (OSH)	Misc. Revenue PlanUW				
030202 - COLS Program Development (OSH)	Misc. Revenue PlanUW				
031005 - Summer CAPP (OSH)	Misc. Revenue PlanUW				

Step 5. INSERT A WEDGE IF NEEDED

Refer to the Insert a Wedge section on [page #](#) for instructions

Step 6. By Program

Start by selecting the By Program tab and continue to follow the previous steps described. Select **By Department and Program** from the top menu. Confirm data entered in Rev Budget By Dept (L1) and Rev Budget By Prgm (L1) forms appears in the Rev Budget By Dept and Prgm (L1) form as expected.

Fund	Project	2018 - 2019	2019 - 2020	2019 - 2020
131 - Academic Student Fees	No Projects Oshkosh			
		Budget	Budget	Budget
		Total Year	Total Year	Comments

Fund	Project	2017 - 2018	2018 - 2019	2018 - 2019
101 - GPO - Doctoral Cluster	No Project			
		Budget	Budget	Budget
		Total Year	Total Year	Comments
Select Department	0 - Student Services	Select Account		
	2 - Instruction	Select Account		
117200 - Nursing-Undergrad Programs (OSH)	2 - Instruction	Grad Tuition - Semester 1 PlanUW	75000	Updated semester 1
		Grad Tuition - Summer PlanUW	500000	Updated for new place
		Undergrad Tuition - Semester 2 PlanUW	350	

Step 7. By Department & Program

Select **By Department and Program** from the top menu. Confirm data entered in Rev Budget By Dept (L1) and Rev Budget By Prgm (L1) forms appears in the Rev Budget By Dept and Prgm (L1) form as expected.

By Department | By Program | **By Department and Program** | By Project | By Proj, Dept and Prgm | Input Review | Trend Review | PA Review

Rev Budget by Dept and Prgm (L1)

Fund: 131 - Academic Student Fees | Project: No Projects Oshkosh

	2018 - 2019	2019 - 2020	2019 - 2020				
	Budget	Budget	Budget				
Total Year	Total Year	Comments					

By Department | By Program | **By Department and Program** | By Project | By Proj, Dept and Prgm | Input Review | Trend Review | PA Review

Rev Budget by Dept and Prgm (L1)

Fund: 131 - Academic Student Fees | Project: No Projects Oshkosh

			2018 - 2019	2019 - 2020	2019 - 2020
			Budget	Budget	Budget
			Total Year	Total Year	Comments
020199 - OSRCA DT (OSH)	4 - Research	Misc. Revenue PlanUW		72,000	Training
020299 - CAR DT (OSH)	0 - Student Services	Misc. Revenue PlanUW		25,000	Training
021039 - IT Degree Program (OSH)	1 - Institutional Support	Misc. Revenue PlanUW			
	5 - Public Service	Misc. Revenue PlanUW			

Non-Compensation | Revenue | Dashboards | Data

By Department | By Program | **By Department and Program** | By Project | By Proj, Dept and Prgm | Input Review | Trend Review | PA Review

Rev Budget by Dept and Prgm (L1)

Fund: 131 - Academic Student Fees | Project: No Projects Oshkosh

Information
Messages for this page are listed below.
 The data has been saved.
 Rule was run successfully.
 Smart Push successfully submitted as background job.

OK

			2018 - 2019	2019 - 2020	2019 - 2020
			Budget	Budget	Budget
			Total Year	Total Year	Comments
020199 - OSRCA DT (OSH)	4 - Research	Misc. Revenue PlanUW		72,000	Training
020299 - CAR DT (OSH)	0 - Student Services	Misc. Revenue PlanUW		25,000	Training
021039 - IT Degree Program (OSH)	1 - Institutional Support	Misc. Revenue PlanUW			
	5 - Public Service	Misc. Revenue PlanUW			
021040 - Ret Progress Grad Enhanc (OSH)	1 - Institutional Support	Misc. Revenue PlanUW			
	6 - Academic Support	Misc. Revenue PlanUW			

Actions: Save Refresh

Data Ad hoc Format

Reviewing Revenue Data

Step 1.

Navigate to the Input Review form and confirm the actuals appear

By Department | By Program | By Department and Program | By Project | By Proj. Dept and Prgm | **Input Review** | Trend Review | PA Review

Rev Rollup Review (L1)

Department: 088835 - COEHS EDD Program (OSH) Fund: 131 - Academic Student Fees Program: 2 - Instruction Project: No Projects Oshkosh

	2016 - 2017	2017 - 2018	2018 - 2019	2018 - 2019	2019 - 2020	2019 - 2020	2019 - 2020
	Actual	Actual	Actual	Budget	Budget	CY vs. PY Budget (\$)	Budget
	Total Year	Total Year	Y-T-D(Aug)	Total Year	Total Year	Total Year	Comments
Expenses	41,806.4	79,761	8,661	90,950	69,500	21,450	
Grad Tuition-Semester 1 PlanUW							
▢ Grad Tuition - Semester 1							
Grad Tuition-Semester 2 PlanUW							

Step 2.

Validate the data you Input in the previous forms appears in the Input Review form as well.

By Department | By Program | By Department and Program | By Project | **Input Review** | Consolidated Review

Rev Rollup Review (L1)

Department: 117200 - Nursing-Undergrad Programs (OSH) Fund: 102 - GPO - Non-Doctoral Cluster Program: 2 - Instruction Project: No Project

	2015 - 2016	2016 - 2017	2017 - 2018	2017 - 2018	2018 - 2019	Years	2018 - 2019
	Actual	Actual	Actual	Budget	Budget	CY vs. PY Budget (\$)	Budget
	Total Year	Total Year	Y-T-D(Jun)	Total Year	Total Year	Total Year	Comments
Expenses	2421757.6	2547236	504418	276852	2083139	-1806288	
Tuition					185000	-185000	
9240 - State Appropriations	2421758	2176623	260112	255173	315639	-60467	
Misc. Revenue PlanUW							
▢ Misc. Revenue							
▢ Revenue	2421758	2176623	260112	255173	500639	-245467	
▢ Statement of Activities	0	-370612	-244306	-21679	-1582500	1560821	

Step 3.

If needed, adjust and save Budget data.

By Department | By Program | By Department and Program | By Project | **Input Review** | Consolidated Review

Rev Rollup Review (L1) ⓘ

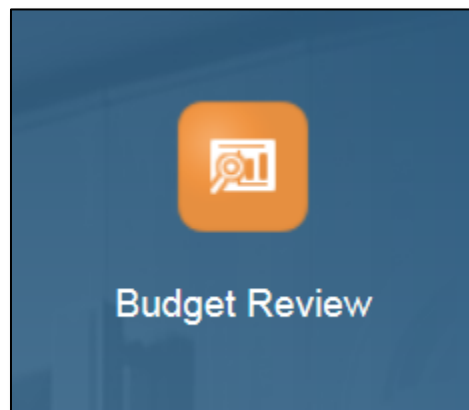
Department: 117200 - Nursing-Undergrad Programs (OSH) Fund: 102 - GPO - Non-Doctoral Cluster Program: 2 - Instruction Project: No Project

Actions Save Refresh

Data Ad hoc Format

	2015 - 2016	2016 - 2017	2017 - 2018	2017 - 2018	2018 - 2019	Years	2018 - 2019			
	Actual	Actual	Actual	Budget	Budget	CY vs. PY Budget (\$)	Budget			
	Total Year	Total Year	Y-T-D(Jun)	Total Year	Total Year	Total Year	Comments			
Expenses	2421757.6	2547236	504418	276852	2083139	-1806288				
Tuition					185000	-185000				
9240 - State Appropriations	2421758	2176623	260112	255173	315839	-60467				
Misc. Revenue PlanUW					200000	-200000				
Misc. Revenue					200000	-200000				
Revenue	2421758	2176623	260112	255173	700639	-445467				
Statement of Activities	0	-370612	-244306	-21679	-1382500	1360821				

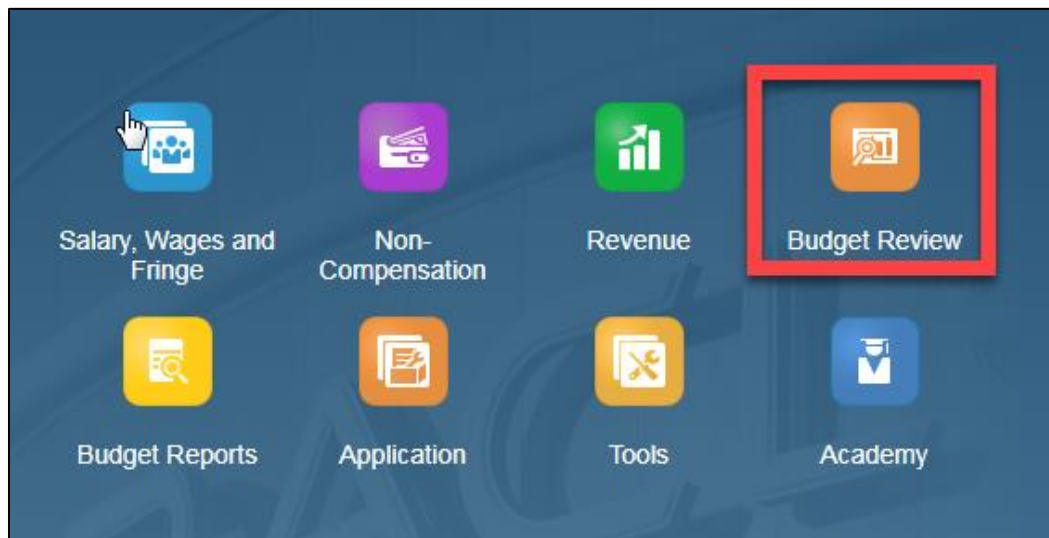
Budget Review



The process of budget review section contains the instructions to conduct budget reviews for:

- ✓ Trend Reviews
- ✓ PA Reviews
- ✓ Review by Fund
- ✓ Fringe Level Checks
- ✓ Fringe Budget by Departments
- ✓ Non-Comp Level Check
- ✓ Version Copy Review
- ✓ How to Modify Data in Input Forms
- ✓ How to View Variances
- ✓ How to Copy a Fund Total
- ✓ How to Clear Versions.

All Budget Reviews begin in the Budget Review tile on the Home page:



Trend Review

Step 1.

Select **Trend Review** from the top menu. Continue to update the Department following the steps already mentioned.

By Department | By Program | By Department and Program | By Project | By Proj, Dept and Prgm | Input Review | **Trend Review** | PA Review

Consolidated Review Yearly Trend ⓘ

Department: UW OSH ALL_ORGS (OSH) Fund: 131 - Academic Student Fees Project: No Projects Oshkosh

Trend Review | PA Review | Review by Fund

Consolidated Review Yearly Trend ⓘ

Department: 06 - INFORMATION TECHNOLOGY (MSN) Fund: Fund Total Project: No Projects Madison

		2016 - 2017	2017 - 2018	2018 - 2019	2018 - 2019	2018 - 2019	2019 - 2020
		Actual	Actual	Actual	Budget	Budget	Budget
		Final	Final	Final	Final	Revised Budget	Working
		Total Year	Total Year	Aug YTD	Total Year	Total Year	Total Year
Program Total	Revenue	16,720,397.46000	71,361,081	4,015,466			0
Program Total	Permanent FTE						583
Program Total	Graduate Asst FTE						
Program Total	Salary	45,139,016	46,528,314	7,497,962	49,459,579	49,459,579	49,459,579
Program Total	Fringe	14,897,135	15,349,609	3,063,739	3,600,521	3,600,521	28,933
Program Total	Salary, Wages & Fringe	60,036,150	61,877,923	10,561,702	53,060,100	53,060,100	49,488,512
Program Total	Supplies and Expense	52,246,287	56,588,551	7,312,618	41,500,825	41,500,825	20,000
Program Total	Capital Expense	4,113,701	4,747,922	211,753	7,472,000	7,472,000	
Program Total	Aid to Individuals & Organizations				0	0	



Any member with a symbol on it is "drillable" in any of the forms within PlanUW. Click on this symbol to expand the members that rollup to the parent member as applicable for your budget review.

1. View the Actual data
2. View the current fiscal year's Redbook Budget
3. View the current fiscal year's Revised Budget
4. Validate the budget from previous inputs



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PA Review

Step 1.

To continue to conduct a Planning Allocation review, click on the **PA Review** tab on the top menu.

PA Review By Account			
	Budget	PA - Budget Allocation	Allocation Target vs Budget (\$)
	Working Program Total	Final No Program	Working No Program
Permanent FTE	656,106,315	675	(19)
Graduate Asst FTE			
Salary	58,663,876	55,500,802	3,163,074
Fringe		34,790	(34,790)
Salary, Wages & Fringe	58,663,876	55,535,592	3,128,284
Non Comp Expense Planning Allocation		4,116,537	(4,116,537)
Supplies and Expense	195,000		195,000
Capital Expense	1,391,189		1,391,189
Aid to Individuals & Organizations			
Special Purpose			

PA Review By Program			
	Budget	PA - Budget Allocation	Allocation Target vs Budget (\$)
	Working	Final	Working
0 - Student Services	379,602	902,874	(523,272)
1 - Institutional Support			
2 - Instruction	25,897,584	40,810,633	(14,913,049)
3 - Hospitals			
4 - Research	22,303,091	12,301,651	10,001,440
5 - Public Service	442,832	872,827	(429,995)
6 - Academic Support	11,226,956	4,235,256	6,991,700
7 - Operation and Maintenance of Physical Plant			
8 - Auxiliary Enterprises			
9 - Financial Aid		528,888	(528,888)
F - Farm Operations			
R - Revenue			
Program Total	60,250,065	59,652,129	597,936

Step 2.

Select the **Department**, **Fund**, and **Project** combination you wish to view on the PA Dashboard, and click the **right arrow** in the right hand corner to submit your selections

PA Review By Account			
	Budget	PA - Budget Allocation	Allocation Target vs Budget (\$)
	Working Program Total	Final No Program	Working No Program
Permanent FTE	3,778,453,944,000	939	2,840
Graduate Asst FTE			
Salary	282,585,638	55,500,802	227,084,836
Fringe	1,043,791	34,790	1,009,001
Salary, Wages & Fringe	283,629,429	55,535,592	228,093,837
Non Comp Expense Planning Allocation		4,116,537	(4,116,537)
Supplies and Expense	650,786		650,786
Capital Expense	1,391,189		1,391,189
Aid to Individuals & Organizations			
Special Purpose			
Debt Service			
Sales Credits			

PA Review By Program			
	Budget	PA - Budget Allocation	Allocation Target vs Budget (\$)
	Working	Final	Working
0 - Student Services	381,652	902,874	(521,222)
1 - Institutional Support			
2 - Instruction	114,159,791	46,257,663	67,902,128
3 - Hospitals			
4 - Research	149,263,412	13,504,543	135,758,869
5 - Public Service	8,002,725	1,644,611	6,358,114
6 - Academic Support	13,833,188	4,241,649	9,591,539
7 - Operation and Maintenance of Physical Plant	30,636		30,636
8 - Auxiliary Enterprises			
9 - Financial Aid		528,888	(528,888)
F - Farm Operations			
R - Revenue			
Program Total	285,671,404	67,080,228	218,591,176



Only **Madison** and **Milwaukee** have planning allocation data at the Division/Department level. All other Institutions will only be able to select their Total University from the page dropdown.

Step 3.

Use the form on the left hand side of the dashboard to view the working Budget, data loaded from the Planning Allocation tool, and the variance by **Salary, Fringe, and Non Compensation Expenditures**.

The screenshot shows the 'PA Review By Account' table on the left side of the dashboard. The table is highlighted with a red box. The table has columns for Budget, PA - Budget Allocation, and Allocation Target vs Budget (\$). The rows include Permanent FTE, Graduate Asst FTE, Salary, Fringe, Salary, Wages & Fringe, Non Comp Expense Planning Allocation, Supplies and Expense, Capital Expense, Aid to Individuals & Organizations, Special Purpose, Debt Service, Sales Credits, Non Salary & Wages, and Expenses.

	Budget		PA - Budget Allocation	Allocation Target vs Budget (\$)
	Working Program Total	Final No Program		
Permanent FTE	653,093,535	667		(14)
Graduate Asst FTE				
Salary	58,424,933	55,227,355		3,197,578
Fringe				
Salary, Wages & Fringe	58,424,933	55,227,355		3,197,578
Non Comp Expense Planning Allocation		3,125,670		(3,125,670)
Supplies and Expense	195,000			195,000
Capital Expense	1,391,189			1,391,189
Aid to Individuals & Organizations				
Special Purpose				
Debt Service				
Sales Credits				
Non Salary & Wages	1,586,189	3,125,670		(1,539,481)
Expenses	60,011,122	58,353,025		1,658,097

Step 4.

Use the form on the right hand side of the dashboard to view the working Budget, data loaded from the Planning Allocation tool, and the variance for **Total Expenditures by Program**.

The screenshot shows the 'PA Review By Program' table on the right side of the dashboard. The table is highlighted with a red box. The table has columns for Budget, PA - Budget Allocation, and Allocation Target vs Budget (\$). The rows include Student Services, Institutional Support, Instruction, Hospitals, Research, Public Service, Academic Support, Operation and Maintenance of Physical Plant, Auxiliary Enterprises, Financial Aid, Farm Operations, Revenue, and Program Total.

	Budget		PA - Budget Allocation	Allocation Target vs Budget (\$)
	Working	Final		
0 - Student Services	379,602	890,895		(511,293)
1 - Institutional Support				
2 - Instruction	25,897,584	40,810,633		(14,913,049)
3 - Hospitals				
4 - Research	22,303,091	12,301,651		10,001,440
5 - Public Service	203,889	114,590		89,299
6 - Academic Support	11,226,956	4,235,256		6,991,700
7 - Operation and Maintenance of Physical Plant				
8 - Auxiliary Enterprises				
9 - Financial Aid				
F - Farm Operations				
R - Revenue				
Program Total	60,011,122	58,353,025		1,658,097

Review By Fund

Step 1.

Use the form on the right hand side of the dashboard to view the working Budget, data loaded from the Planning Allocation tool, and the variance for **Total Expenditures by Program**.

Consolidated Review By Fund		2018 - 2019	2019 - 2020	2019 - 2020	2019 - 2020	2019 - 2020	2019 - 2020	2019 - 2020	2019 - 2020
		Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget
		Final	Working	Working	Working	Working	Working	Working	Working
		Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year
		Fund Total	GPR/Tuition	TUI	OP REC	FICR	GGC	OTHER	Fund Total
Program Total	Revenue			902,141	305,007				1,207,148
Program Total	Permanent FTE		656	16	205	13	2,885	3	3,778
Program Total	Graduate Asst FTE								
Program Total	Salary	293,581,576	58,663,876	1,325,719	13,450,739	1,025,378	207,860,684	259,242	282,585,638
Program Total	Fringe	6,299,861		38,436	1,002,687			2,668	1,043,791
Program Total	Salary, Wages & Fringe	299,881,437	58,663,876	1,364,155	14,453,426	1,025,378	207,860,684	261,910	283,629,429
Program Total	Supplies and Expense	18,246,156	195,000		455,786				650,786
Program Total	Capital Expense	2,450,389	1,391,189						1,391,189
Program Total	Aid to Individuals & Organizations	2,173,535							
Program Total	Special Purpose	0							
Program Total	Debt Service								
Program Total	Sales Credits	(19,330,528)							
Program Total	Non Salary & Wages	3,539,552	1,586,189		455,786				2,041,975

Step 2.

Choose a parent level Department, and Project. View the current fiscal year (FY19) Redbook Budget.

Consolidated Review By Fund		2017 - 2018	2018 - 2019	2018 - 2019	2018 - 2019	2018 - 2019	2018 - 2019	2018 - 2019
		Budget	Budget	Budget	Budget	Budget	Budget	Budget
		Final	Working	Revised Budget	Working	Working	Working	Working
		Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year
		Fund Total	GPR/Tuition	AUX	OP REC	GGC	OTHER	Fund Total
Program Total	Revenue	2,230,688	4,534,216	10,931	1,933,498	186,539	(292)	6,894,630
Program Total	Permanent FTE		36		5			58
Program Total	Graduate Asst FTE							
Program Total	Salary	758,360	2,799,297	11,755	797,804	9,919		5,058,011
Program Total	Fringe	182,581	1,511,293	1,522	99,700	5,861		1,692,897
Program Total	Salary, Wages & Fringe	940,941	4,310,590	13,277	897,504	15,780		6,750,908
Program Total	Supplies and Expense	210,626	63,590	874	161,833	34,736	4,000	292,250
Program Total	Capital Expense	38,280	1,350		3,180			48,701
Program Total	Aid to Individuals & Organizations	2,434			719	2,291		3,010
Program Total	Special Purpose		100					100
Program Total	Debt Service							
Program Total	Sales Credits							
Program Total	Non Salary & Wages	251,339	65,040	874	165,731	37,028	4,000	344,061
0 - Student Services	Expenses	595	15,800	736				16,536
1 - Institutional Support	Expenses							

Step 3.

Validate the Budget you have entered from the input forms is correct and aggregated by Department, Program, Fund and Project.

Consolidated Review By Fund ⓘ								
Department 11 - COLLEGE OF NURSING (OSH)		Project No Project						
		2017 - 2018	2018 - 2019	2018 - 2019	2018 - 2019	2018 - 2019	2018 - 2019	2018 - 2019
		Budget	Budget	Budget	Budget	Budget	Budget	Budget
		Final	Working	Revised Budget	Working	Working	Working	Working
		Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year
		Fund Total	GPR/Tuition ⓘ	AUX ⓘ	OP REC ⓘ	GGC ⓘ	OTHER ⓘ	Fund Total
Program Total	Revenue	2,230,688	4,534,216	10,931	1,933,498	186,539	(292)	6,894,630
Program Total	Permanent FTE		36		5			58
Program Total	Graduate Asst FTE							
Program Total	Salary	758,360	2,799,297	11,755	797,804	9,919		5,058,011
Program Total	Fringe	182,581	1,511,293	1,522	99,700	5,861		1,692,897
Program Total	Salary, Wages & Fringe	940,941	4,310,590	13,277	897,504	15,780		6,750,908
Program Total	Supplies and Expense	210,626	63,590	874	161,833	34,736	4,000	292,250
Program Total	Capital Expense	38,280	1,350		3,180			48,701
Program Total	Aid to Individuals & Organizations	2,434			719	2,291		3,010
Program Total	Special Purpose		100					100
Program Total	Debt Service							
Program Total	Sales Credits							
Program Total	Non Salary & Wages	251,333	65,040	874	165,731	37,028	4,000	344,061
0 - Student Services	Expenses	595	15,800	736				16,536
1 - Institutional Support	Expenses							
2 - Institutional Support	Expenses							



In the first year, the current fiscal year's Budget will only exist at the Major Class level due to the level of detail required in 3270. However, going forward this budget will exist at whatever level was used to budget in the prior year in PlanUW

Fringe Level Check

Step 1.

1. Navigate to the "Level Check Form" page. The page will default to the Fringe Level Check Review form
2. Choose the Fund, Program and Project members from the page drop down
3. After your page selections, confirm the Fringe Level Check review form appears with your "User Institution" in the Column.

The screenshot shows the "Fringe Level Check Review" form. Callout 1 points to the "Fringe Level Check Review" title and the "NonComp Level Check" link. Callout 2 points to the dropdown menus for "Fund", "Program", and "Project". Callout 3 points to the "Total Year" dropdown menu.

2019 - 2020	
Budget	
Input	
Total Year	
53 - MEDICAL SCHOOL	
JAN 2019	
LEVEL 1 - TOTAL FRINGE	
Fringe PlanUW	1,000
LEVEL 2 (CALC) - TOTAL FRINGE BY POSITION OR TOTAL FICA, GROUP HEALTH, MISC	
Faculty/Acad Fringe PlanUW	500
University Staff Fringe PlanUW	
LTE Fringe PlanUW	
Grad Assistant Fringe PlanUW	
Student Fringe PlanUW	
Misc. Fringe PlanUW	250
FICA PlanUW	250
Other Group Health PlanUW	
1921 - Group Health Insurance - ER	
Fringe-Gift/Fed Trf PlanUW	
Level 2 Comp Input Accounts	1,000



Account overlaps may or may not be an issue depending on your own unique institutional, and departmental processes and controls, and how you plan to utilize the new Budget CoA.

Step 2.


View the fringe budget entries between the levels 1, 2, 3 and 4.

The following five accounts are in level 2 and 3, which will result in a account level overlap:

- Misc. Fringe
- FICA
- 1921 - Group Health Insurance – ER
- Other Group Health
- Fringe-Gift/Fed Trf

Fringe Level Check Review NonComp Level Check	
Fringe Level Check Review ⓘ	
Fund 101 - GPO - Doctoral Cluster	Program 0 - Student Services
Project No Projects Madison	
	2019 - 2020
	Budget
	Input
	Total Year
	53 - MEDICAL SCHOOL
LEVEL 1 - TOTAL FRINGE	
Fringe PlanUW	1,000
LEVEL 2 (CALC) - TOTAL FRINGE BY POSITION OR TOTAL FICA, GROUP HEALTH, MISC	
Faculty/Acad Fringe PlanUW	500
University Staff Fringe PlanUW	
LTE Fringe PlanUW	
Grad Assistant Fringe PlanUW	
Student Fringe PlanUW	
Misc. Fringe PlanUW	250
FICA PlanUW	250
Other Group Health PlanUW	
1921 - Group Health Insurance - ER	
Fringe-Gift/Fed Trf PlanUW	
Level 2 Comp Input Accounts	1,000

Step 3.

Click the  button on the department member in the column to expand the department dimension to identify which division(s), department(s), and sub-department(s) potential improper overlaps may be occurring in.

Fringe Level Check Review NonComp Level Check			
Fringe Level Check Review ⓘ			
Fund	Program	Project	
101 - GPO - Doctoral Cluster	0 - Student Services	No Projects Madison	
		2019 - 2020	
		Budget	
		Input	
		Total Year	
		530254 - ADMINISTRATION INFO SYS (MSN)	5302 - ADMINISTRATION (MSN)
		53 - MEDICAL SCHOOL (MSN)	
LEVEL 1 - TOTAL FRINGE			
Fringe PlanUW		1,000	1,000
LEVEL 2 (CALC) - TOTAL FRINGE BY POSITION OR TOTAL FICA, GROUP HEALTH, MISC			
Faculty/Acad Fringe PlanUW		500	500
University Staff Fringe PlanUW			
LTE Fringe PlanUW			
Grad Assistant Fringe PlanUW			
Student Fringe PlanUW			
Misc. Fringe PlanUW		250	250
FICA PlanUW		250	250
Other Group Health PlanUW			
1921 - Group Health Insurance - ER			
Fringe-Gift/Fed Trf PlanUW			
Level 2 Comp Input Accounts		1,000	1,000



There is Column Suppression on the webform, meaning users will only see the division(s), department(s), and sub-department(s) that have data.

Fringe Budget By Department

Step 1.

If you find any improper fringe account overlaps, navigate back to a Fringe webform of your choice (direct input or by rate) to adjust the data as applicable to fix the overlaps, and repeat the previous steps in **Fringe Level Check** to ensure the adjustment has taken affect in the “Fringe Level Check” form.

			2018 - 2019	2019 - 2020	2019 - 2020
			Budget	Budget	Budget
			Total Year	Total Year	Comments
530254 - ADMINISTRATION*ACAD INFO SYS (MSN)	Faculty/Acad Fringe PlanUW			500	
	Misc. Fringe PlanUW			250	
	FICA PlanUW			250	



The screen shot on this step shows the Fringe Budget by Dept (L1) webform, but you can choose any Fringe Input webform to make your fringe budget modifications.

Non-Comp Level Check

Step 1.

Click the “NonComp Level Check” Horizontal Tab. Confirm the “NonComp Level Check” form opens.

Fund	Program	Project	Project Total
101 - GPO - Doctoral Cluster	0 - Student Services	Project Total	
2019 - 2020			
Budget			
Input			
Total Year			
53 - MEDICAL SCHOOL (RECAP)			
1 LEVEL (1 & 2 & 3 = SAME)			
3790 - Material for Resale			
3 LEVELS			
Lv11 - Travel/Training/Recruiting 9,000			
Lv12 - Travel/Training/Recruiting			
Lv13 - Travel/Training/Recruiting			
Travel/Training/Recruiting 9,000			

Step 2.


1. Choose the Fund, Program and Project members from the page drop down.
2. View the Non Comp Expenditure budget entries between the levels 1, 2, 3.

Fund	Program	Project	Project Total
101 - GPO - Doctoral Cluster	0 - Student Services	No Projects Madison	
2019 - 2020			
Budget			
Input			
Total Year			
53 - MEDICAL SCHOOL (RECAP)			
1 LEVEL (1 & 2 & 3 = SAME)			
3790 - Material for Resale			
3 LEVELS			
Lv11 - Travel/Training/Recruiting 9,000			
Lv12 - Travel/Training/Recruiting 1,000			
Lv13 - Travel/Training/Recruiting			
Travel/Training/Recruiting 10,000			
2 LEVELS (1 & 2 = SAME)			
Lv11 - Maint & Repairs 2,000			
Lv13 - Maint & Repairs			
Maint & Repairs 2,000			



Account overlaps may or may not be an issue depending on your own unique institutional, and departmental processes and controls, and how you plan to utilize the new Budget CoA. This form is meant to highlight where potential improper overlaps may have occurred, but not control the data entry processes as the PlanUW application has been specifically designed to provide flexibility for data entry institution by institution, and user by user.

Step 3.

Click the  button on the department member in the column to expand the department dimension to identify which division(s), department(s), and sub-department(s) potential improper overlaps may be occurring in.

Fringe Level Check Review | **NonComp Level Check**

NonComp Level Check Review

Fund 101 - GPO - Doctoral Cluster | Program 0 - Student Services | Project No Projects Madison

	2019 - 2020			
	Budget			
	Input			
	Total Year			
	530215 - ADMINISTRATION DEV (MSN)	530235 - ADMINISTRATION SERVICES (MSN)	5302 - ADMINISTRATION (MSN)	53 - MEDICAL SCHOOL (MSN)
1 LEVEL (1 & 2 & 3 = SAME)				
3790 - Material for Resale				
3 LEVELS				
Lvl1 - Travel/Training/Recruiting	9,000		9,000	9,000
Lvl2 - Travel/Training/Recruiting		1,000	1,000	1,000
Lvl3 - Travel/Training/Recruiting				
Travel/Training/Recruiting	9,000	1,000	10,000	10,000
2 LEVELS (1 & 2 = SAME)				
Lvl1 - Maint & Repairs	2,000		2,000	2,000
Lvl3 - Maint & Repairs				
Maint & Repairs	2,000		2,000	2,000

Step 4.

If you find any improper account overlaps, navigate back to a Non Comp webform of your choice to adjust the data as applicable to fix the overlaps, and repeat the previous steps in **Non Comp Level Check** to ensure the adjustment has taken effect in the "Non Comp Level Check" form.

By Department | By Program | By Department and Program | By Project | Input Review | Trend Review | PA Review

NonComp Budget by Dept (L2)

Fund 101 - GPO - Doctoral Cluster | Program 0 - Student Services | Project No Projects Madison

		2018 - 2019	2019 - 2020	2019 - 2020
		Budget	Budget	Budget
		Total Year	Total Year	Comments
530215 - ADMINISTRATION*PROG DEV (MSN)	Maint & Repairs PlanUW		2,000	Test Entry
	Utilities PlanUW			
	Supplies PlanUW		9,000	Office Supplies
	Equipment PlanUW			
	Misc Capital Expense PlanUW			
	5708 - Aids to Organizations			
	5750 - Student Loans			
	Debt Service PlanUW			
	Sales Credits PlanUW			
530235 - ADMINISTRATION*SHARED SERVICES (MSN)	Non-Training PlanUW		1,000	Test Entry

Version Copy Review

Step 1.

Navigate to the "Copy Version" Form.

Copy Version Budget Approval Status Tracker

Consolidated Review Version Copy

Department: 53 - MEDICAL SCHOOL (MSN) Project: Project Total Fund: GPR/Tuition

		2019 - 2020		2019 - 2020			2019 - 2020	
		Budget		Budget			Budget	
		Working		Campus Review	Campus Review v. Working Variance		Final	Final v. Working Variance
		Total Year		Total Year			Total Year	
Program Total	Revenue							
Program Total	Permanent FTE	656						
	Graduate Asst FTE							
Program Total	Salary	58,663,876						
	Fringe	2,000						
Program Total	Salary Wages & Fringe	58,665,876						
Program Total	Supplies and Expense	198,000						
	Capital Expense	1,391,189						
	Aid to Individuals & Organizations							
	Special Purpose							
	Debt Service							
	Sales Credits							
Program Total	Non Salary & Wages	1,589,189						



Please ensure your User Institution variable is set to the Department you wish to view in this form. The department values are aggregated automatically when a user opens the "Copy Version" form. However, to maximize performance on the form load time, the aggregation is based on the user Institution you set in user variables for every pod **but Madison** (using PA Hierarchy).

Step 2.

1. Choose a Department and Fund member from the page drop down.
2. Validate the working Budget is aggregated correctly based on your inputs from the input forms.

Copy Version | Budget Approval Status Tracker

Consolidated Review Version Copy

Project: Madison Project Total | Department: 53 - MEDICAL SCHOOL (MSN) | Fund: GPR/Tuition

		2019 - 2020	2019 - 2020	2019 - 2020	2019 - 2020	2019 - 2020
		Budget	Budget	Budget	Budget	Budget
		Working	Campus Review	Campus Review v. Working Variance	Final	Final v. Working Variance
		Total Year	Total Year		Total Year	
Program Total	Revenue					
Program Total	Permanent FTE	656				
	Graduate Asst FTE					
Program Total	Salary	58,663,876				
	Fringe	2,000				
Program Total	Salary, Wages & Fringe	58,665,876				
Program Total	Supplies and Expense	198,000				
	Capital Expense	1,391,189				
	Aid to Individuals & Organization					
	Special Purpose					
	Debt Service					
	Sales Credits					
Program Total	Non Salary & Wages	1,589,189				



The Project dimension is fixed on the total project for the institution and cannot be changed. The Department dimension is fixed on the Divisional level, and the PA hierarchy level for **your institution**. The Fund dimension is fixed on the Fund groupings, so the 3-digit fund numbers are not selectable. The page selections are to correlate with the Budget Approval Status Tracker in subsequent steps.

Step 3.

Right click anywhere on the form, or click the **Actions** button in the upper right hand corner to display the actions dropdown. Click the **“Copy to Campus Review”** menu to copy the working Budget to the Campus Review Version for the Department and Fund in the page.

The screenshot shows the 'Copy Version | Budget Approval Status Tracker' interface. The title is 'Consolidated Review Version Copy'. The project is 'Madison Project Total', the department is '53 - MEDICAL SCHOOL (MSN)', and the fund is 'GPR/Tuition'. The table displays budget data for 2019-2020, comparing Working, Campus Review, and Final versions. The 'Actions' dropdown menu is open, and 'Copy to Campus Review' is highlighted.

		2019 - 2020	2019 - 2020	2019 - 2020		
		Budget	Budget	Budget		
		Working	Campus Review	Campus Review v. Working Variance	Final	Final v. Working Variance
		Total Year	Total Year		Total Year	
Program Total	Revenue					
Program Total	Permanent FTE	656				
Program Total	Graduate Asst FTE					
Program Total	Salary	58,663,876				
Program Total	Fringe	2,000				
Program Total	Salary, Wages & Fringe	58,665,876				
Program Total	Supplies and Expense	198,000				
Program Total	Capital Expense	1,391,189				
Program Total	Aid to Individuals & Organizations					
Program Total	Special Purpose					
Program Total	Debt Service					
Program Total	Sales Credits					
Program Total	Non Salary & Wages	1,589,189				
0 - Student Services	Expenses	384,602				
1 - Institutional Support	Expenses					

Step 4.

Confirm the Campus Review Version is populated and no variance exists between the Working version and Campus Review version.

The screenshot shows the same 'Copy Version | Budget Approval Status Tracker' interface. The 'Campus Review' column is now populated with data, and the 'Campus Review v. Working Variance' column shows zero variance for all items. A red box highlights the 'Campus Review' and 'Campus Review v. Working Variance' columns.

		2019 - 2020	2019 - 2020	2019 - 2020		
		Budget	Budget	Budget		
		Working	Campus Review	Campus Review v. Working Variance	Final	Final v. Working Variance
		Total Year	Total Year		Total Year	
Program Total	Revenue					
Program Total	Permanent FTE	656	656	0		
Program Total	Graduate Asst FTE					
Program Total	Salary	58,663,876	58,663,876	0		
Program Total	Fringe	2,000	2,000	0		
Program Total	Salary, Wages & Fringe	58,665,876	58,665,876	0		
Program Total	Supplies and Expense	198,000	198,000	0		
Program Total	Capital Expense	1,391,189	1,391,189	0		
Program Total	Aid to Individuals & Organizations					
Program Total	Special Purpose					
Program Total	Debt Service					
Program Total	Sales Credits					
Program Total	Non Salary & Wages	1,589,189	1,589,189	0		

Status Approval Tracker – Ready for Campus Review

1. Navigate to the "Budget Approval Status Tracker" form
2. View the Budget Approval Status for your Division(s), or PA member(s) by Fund Grouping. Confirm the Division/Fund combination you copied from "Working" to the "Campus Review" version in the previous form is reflected with a status of "Ready for Campus Review" in this Webform.

Copy Version

1

Budget Approval Status Tracker

Budget Approval Status Tracker

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A few things to consider:



- The "Budget Approval Status Tracker" form is constructed to mirror the "Version Copy" form in terms of what you can select and view for the Department and Fund Dimensions.
- The status should be "In Progress" for any Division/Fund combination you have input data into using the Input forms, and "Not Started" if you have not entered data yet.

Modifying Data in Input Forms

Step 1.

1. To change a cell on the "Budget Approval Status Tracker" from "Not Started" to "In Progress", or back to "In Progress" from "Ready for Campus Review" navigate back to any input form.
2. Choose members from the page drop down.

The screenshot shows the PlanUW interface. At the top, there is a navigation bar with several icons. The 'Non-Compensation' icon is highlighted with a red box and a circled '1'. Below this, the 'NonComp Budget by Dept (L1)' form is displayed. The 'Fund' dropdown menu is highlighted with a red box and a circled '2'. The form also shows 'Program' and 'Project' dropdowns, and a table with columns for '2018 - 2019', '2019 - 2020', and '2020 - 2021'.



The screen shot navigates back to the "Non Comp Budget by Dept (L1)" form, but any input form (Fringe or Revenue) will have the ability to change the status as well

Step 2.

1. Select a 3-digit fund underneath a Fund grouping that was previously "Not Started", and click "Ok"
2. Click the right arrow on the right hand side to submit your selections.

CONTINUE TO NEXT PAGE FOR IMAGES

Select a Member

Fund: 136 - General Operations Receipts

Search Fund

OP REC

136 - General Operations Rece...

Members: Fund> Fund Total> OP REC> 136 - General Operations Receipts

NonComp Budget by Dept (L1)

2018 - 2019 Budget 2019 - 2020 Budget 2019 - 2020 Budget

530210 - ADMINISTRATION*CTRL SVCS (MSN) Maint & Repairs PlanUW Services PlanUW Misc Expense PlanUW Sales Credits PlanUW

530276 - ADMINISTRATION*HSLC (MSN) Services PlanUW Misc Expense PlanUW

Step 3.

To enter data in this form, simply enter data in an editable cell and click save.

NonComp Budget by Dept (L1)

2018 - 2019 Budget 2019 - 2020 Budget 2019 - 2020 Budget

530210 - ADMINISTRATION*CTRL SVCS (MSN) Maint & Repairs PlanUW Services PlanUW Misc Expense PlanUW Sales Credits PlanUW

530276 - ADMINISTRATION*HSLC (MSN) Services PlanUW Misc Expense PlanUW

100

Save

Status Approval Tracker – In Progress

Step 1.

1. Navigate back to the "Budget Approval Status Tracker" form.
2. Confirm the Division/Fund combination you modified data for is reflected with a status of "In Progress" in this Webform

	GPR/Tuition	TUI	TB	AUX	OP REC	FICR	GGC	OTHER	FFA	REV	Fund Total
53 - MEDICAL SCHOOL (MSN)	Ready for Campus Review	In Progress	Not Started	Not Started	In Progress	Not Started	Not Started	In Progress	Not Started	Not Started	In Progress

View Variances

Step 1.

1. Navigate back to the "Copy Version" form
2. View the variances between the working Budget and the Campus Review version, based on the additional data you input

Copy Version Budget Approval Status Tracker

Consolidated Review Version Copy

Project: Madison Project Total | Department: 53 - MEDICAL SCHOOL (MSN) | Fund: Fund Total

		2019 - 2020		2019 - 2020		2019 - 2020	
		Budget	Working	Budget	Campus Review v. Working Variance	Budget	Final v. Working Variance
		Total Year	Total Year	Total Year	Total Year	Total Year	Total Year
Program Total	Revenue	1,868,248		1,207,148	(661,100)		
Program Total	Permanent FTE	3,778		3,778	0		
Program Total	Graduate Asst FTE						
Program Total	Salary	282,585,638		282,585,638	0		
Program Total	Fringe	1,045,791		1,045,791	0		
Program Total	Salary, Wages & Fringe	283,631,429		283,631,429	0		
Program Total	Supplies and Expense	1,793,738		653,786	(1,139,952)		
Program Total	Capital Expense	1,516,189		1,391,189	(125,000)		
Program Total	Aid to Individuals & Organizations						
Program Total	Special Purpose						
Program Total	Debt Service						
Program Total	Sales Credits	(500,000)					
Program Total	Non Salary & Wages	2,809,927		2,044,975	(764,952)		

Copy Fund Total

Step 1.

1. Select "Fund Total" from the Page dropdown
2. Right click anywhere on the form or click the Actions button in the upper right-hand corner to display the actions dropdown. Click the "Copy to Campus Review" menu to copy your working Budget to the Campus Review Version for Fund Total.

The screenshot shows the 'Copy Version | Budget Approval Status Tracker' interface. The 'Consolidated Review Version Copy' dropdown is open, and 'Copy to Campus Review' is highlighted. The table below shows the budget data for the 2019-2020 fiscal year.

		2019 - 2020	2019 - 2020	2019 - 2020
		Budget	Budget	Budget
		Working	Campus Review	Final v. Working Variance
		Total Year	Total Year	Total Year
Program Total	Revenue	1,973,248.26	1,297,148	(766,100)
Program Total	Permanent FTE	3,778	3,778	0
Program Total	Graduate Asst FTE			
Program Total	Salary	282,585,638	282,585,638	0
Program Total	Fringe	1,045,791	1,045,791	0
Program Total	Salary, Wages & Fringe	283,631,429	283,631,429	0
Program Total	Supplies and Expense	1,793,738	653,786	(1,139,952)

Step 2.

Confirm the Campus Review Version is populated and no variance exists between the Working version and the Campus Review version.

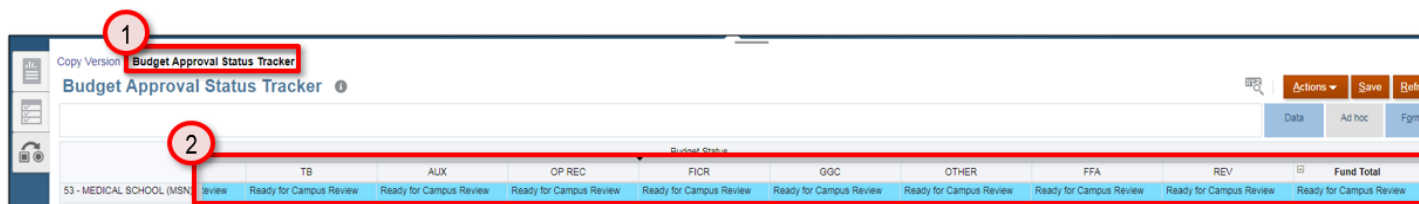
The screenshot shows the 'Copy Version | Budget Approval Status Tracker' interface. The 'Consolidated Review Version Copy' dropdown is open, and 'Copy to Campus Review' is highlighted. The table below shows the budget data for the 2019-2020 fiscal year.

		2019 - 2020	2019 - 2020	2019 - 2020
		Budget	Budget	Budget
		Working	Campus Review	Final v. Working Variance
		Total Year	Total Year	Total Year
Program Total	Revenue	1,973,248	1,973,248	0
Program Total	Permanent FTE	3,778	3,778	0
Program Total	Graduate Asst FTE			
Program Total	Salary	282,585,638	282,585,638	0
Program Total	Fringe	1,045,791	1,045,791	0
Program Total	Salary, Wages & Fringe	283,631,429	283,631,429	0
Program Total	Supplies and Expense	1,793,738	1,793,738	0
Program Total	Capital Expense	1,516,189	1,516,189	0
Program Total	Aid to Individuals & Organizations			
Program Total	Special Purpose			
Program Total	Debt Service			
Program Total	Sales Credits	(500,000)	(500,000)	0
Program Total	Non Salary & Wages	2,809,927	2,809,927	0

Status Approval Tracker – Ready for Campus Review (All Funds)

Step 1.

1. Navigate back to the "Budget Status Approval Tracker" form.
2. Confirm All Funds now have a status of "Ready for Campus Review" pushed to them via the version copy from "Working" to "Campus Review".



Budget Status										
	TB	AUX	OP REC	FICR	GGC	OTHER	FFA	REV		Fund Total
53 - MEDICAL SCHOOL (MSN)	Ready for Campus Review	Ready for Campus Review	Ready for Campus Review	Ready for Campus Review	Ready for Campus Review	Ready for Campus Review	Ready for Campus Review	Ready for Campus Review		Ready for Campus Review



Similar to the Fund Dimension, if you are a Power User or an End User with access to all Institutions you will be able to view the status for all Divisions (or PA members for Madison) on this form, and be able to change your page selection for department on the "Version Copy" form to the total institution to push the status of "Ready for Campus Review" to every Division (or PA member for Madison) as well.

Copy to “Final” – For Power Users Only

Step 1.

1. Navigate back to the "Version Copy" form.
2. Select a specific Fund grouping, or "Fund Total" from the Page dropdown.

Consolidated Review Version Copy

Project: Madison Project Total | Department: 53 - MEDICAL SCHOOL (MSN) | Fund: Fund Total

		2019 - 2020	2019 - 2020	2019 - 2020	2019 - 2020	2019 - 2020
		Budget	Budget	Budget	Budget	Budget
		Working	Campus Review	Campus Review v. Working Variance	Final	Final v. Working Variance
		Total Year	Total Year	Total Year	Total Year	Total Year
Program Total	Revenue	1,973,248	1,973,248	0		
Program Total	Permanent FTE	3,778				
Program Total	Graduate Asst FTE					
Program Total	Salary	282,585,638	1,045,791	0		
Program Total	Fringe	1,045,791	1,045,791	(282,585,638)		
Program Total	Salary, Wages & Fringe	283,631,429	1,045,791	(282,585,638)		
Program Total	Supplies and Expense	1,795,239	1,793,738	(1,501)		
Program Total	Capital Expense	1,567,217	1,516,189	(51,028)		
Program Total	Aid to Individuals & Organizations					
Program Total	Special Purpose					
Program Total	Debt Service					
Program Total	Sales Credits	(403,200)	(500,000)	(96,720)		
Program Total	Non Salary & Wages	2,959,176	2,809,927	(149,249)		

Step 2.

Right click anywhere on the form, or click the Actions button in the upper right hand corner to display the actions dropdown. Click the **“Copy to Final”** menu to copy your working Budget to the Final version.

Consolidated Review Version Copy

Project: Madison Project Total | Department: 53 - MEDICAL SCHOOL (MSN) | Fund: Fund Total

		2019 - 2020	2019 - 2020	2019 - 2020	2019 - 2020	2019 - 2020
		Budget	Budget	Budget	Budget	Budget
		Working	Campus Review	Campus Review v. Working Variance	Final	Final v. Working Variance
		Total Year	Total Year	Total Year	Total Year	Total Year
Program Total	Revenue	1,973,248	1,973,248	0		
Program Total	Permanent FTE	3,778				
Program Total	Graduate Asst FTE					
Program Total	Salary	282,585,638	1,045,791	0		
Program Total	Fringe	1,045,791	1,045,791	(282,585,638)		
Program Total	Salary, Wages & Fringe	283,631,429	1,045,791	(282,585,638)		
Program Total	Supplies and Expense	1,795,239	1,793,738	(1,501)		
Program Total	Capital Expense	1,567,217	1,516,189	(51,028)		
Program Total	Aid to Individuals & Organizations					
Program Total	Special Purpose					

Actions | Save | Refresh

- Copy to Campus Review
- Copy to Final**
- Clear Campus Review
- Clear Final
- Filter
- Analyze
- New Ad Hoc Grid
- Predictive Planning
- Business Rules
- Smart Push Details
- Grid Validation Messages
- Clear Formatting
- Spreadsheet Export
- Open in Smart View

Step 2.

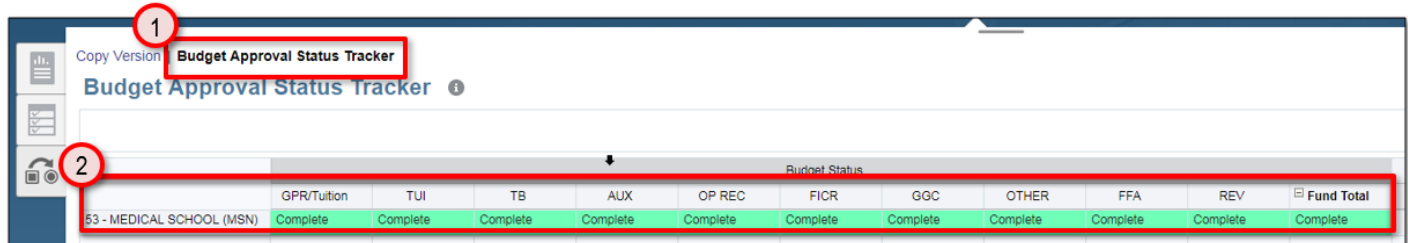
Confirm the Final Version is populated and no variance exists between the Working version and the Final version.

Copy Version Budget Approval Status Tracker							
Consolidated Review Version Copy ⓘ							
Project	Department	Fund					
Madison Project Total	53 - MEDICAL SCHOOL (MSN)	Fund Total					
			2019 - 2020		2019 - 2020		2019 - 2020
			Budget		Budget		Budget
			Working		Campus Review	Campus Review v. Working Variance	Final
			Total Year		Total Year		Total Year
Program Total	Revenue		1,973,248		1,973,248	0	1,973,248
Program Total	Permanent FTE		3,778				3,778
Program Total	Graduate Asst FTE						
Program Total	Salary		282,585,638				282,585,638
Program Total	Fringe		1,045,791		1,045,791	0	1,045,791
Program Total	Salary, Wages & Fringe		283,631,429		1,045,791	(282,585,638)	283,631,429
Program Total	Supplies and Expense		1,795,239		1,793,738	(1,501)	1,795,239
Program Total	Capital Expense		1,567,217		1,516,189	(51,028)	1,567,217
Program Total	Aid to Individuals & Organizations						
Program Total	Special Purpose						
Program Total	Debt Service						
Program Total	Sales Credits		(403,280)		(500,000)	(96,720)	(403,280)
Program Total	Non Salary & Wages		2,959,176		2,809,927	(149,249)	2,959,176

Status Approval Tracker – Complete

Step 1.

1. Navigate back to the "Budget Status Approval Tracker" form.
2. Confirm the Funds in which you copied now have a status of "Final" pushed to them via the version copy from "Working" to "Final".



	GPR/Tuition	TUI	TB	AUX	OP REC	FICR	GGC	OTHER	FFA	REV	Fund Total
53 - MEDICAL SCHOOL (MSN)	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete

Clear Versions

Step 1.

1. Navigate back to the "Version Copy" form.
2. Right click anywhere on the form, or click the Actions button in the upper right hand corner to display the actions dropdown. Click the "Clear Campus Review" or "Clear Final" menu to clear old versions as applicable.

Consolidated Review Version Copy

		2019 - 2020	2019 - 2020	2019 - 2020	2019 - 2020
		Budget	Budget	Budget	Final
		Working	Campus Review	Campus Review v. Working Variance	Final v. Working Variance
Total Year					
Program Total	(i) Revenue	1,973,248.26	1,973,248	0	1,973,248
Program Total	(i) Permanent FTE	3,778			3,778
Program Total	(i) Graduate Asst FTE				
Program Total	(i) Salary	282,585,638	1,045,791	0	282,585,638
Program Total	(i) Fringe	1,045,791	1,045,791	(282,585,638)	1,045,791
Program Total	Salary, Wages & Fringe	283,631,429	1,045,791	(282,585,638)	283,631,429
Program Total	(i) Supplies and Expense	1,795,239	1,793,738	(1,501)	1,795,239
Program Total	(i) Capital Expense	1,567,217	1,516,189	(51,028)	1,567,217
Program Total	(i) Aid to Individuals & Organizations				
Program Total	(i) Special Purpose				
Program Total	(i) Debt Service				

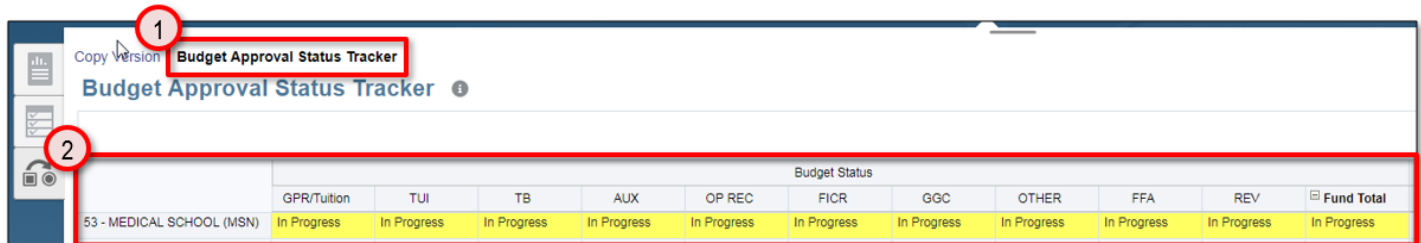


You do not need to clear old versions before re-copying data from working as the Copy menus completely overwrite the past values. However, this utility may be leveraged for Institutions/Users for any Institutional specific processes as applicable now or in the future.

Status Approval Tracker – In Progress

Step 1.

1. Navigate back to the "Budget Approval Status Tracker" form.
2. Confirm the Funds in which you cleared now have a status of "In Progress" pushed to them via the version clear.

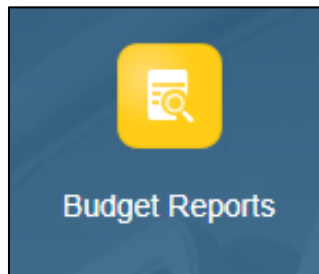


	Budget Status										
	GPR/Tuition	TUI	TB	AUX	OP REC	FICR	GGC	OTHER	FFA	REV	Fund Total
53 - MEDICAL SCHOOL (MSN)	In Progress	In Progress	In Progress	In Progress	In Progress	In Progress	In Progress	In Progress	In Progress	In Progress	In Progress



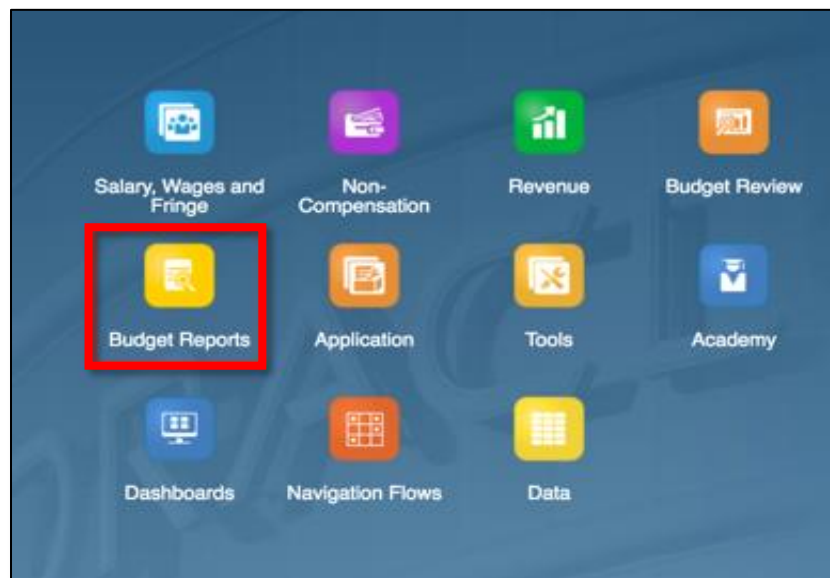
The clear menu will change the Budget Approval Status back to "In Progress" regardless of if you choose to clear the final version, or the campus review version. The working version cannot be cleared with the clear menu.

Budget Reports



There are 8 budget reports. Each report can be opened in HTML, PDF, and Excel formats using Chrome, Firefox, and Internet Explorer and the steps are exactly the same.

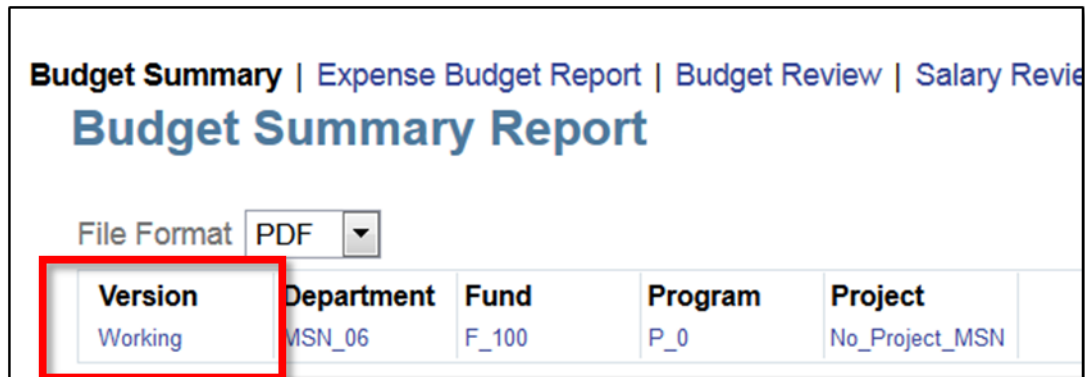
- ✓ Budget Summary*
- ✓ Expense Budget Report
- ✓ Budget Review
- ✓ Salary Review
- ✓ Summary by Program
- ✓ Summary by Fund
- ✓ Summary by Program and Fund
- ✓ Budget vs Actual



*For space reasons, only the Budget Summary report will include all browser and format steps. All reports can be opened following the exact instructions.

NOTE: Point of View Change

If the POV will be changed, users should remember to always use the **Working**, **Final**, **PlanV1**, **PlanV2**, and **PlanV3** versions.



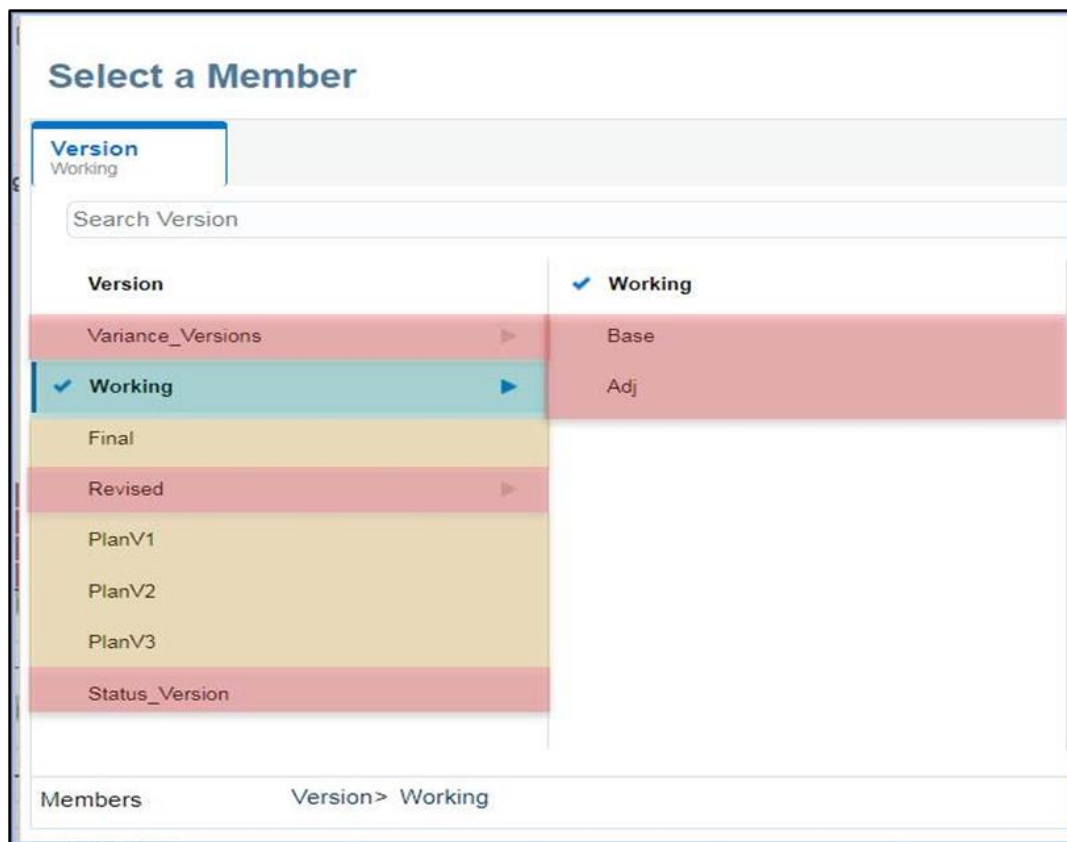
Budget Summary | [Expense Budget Report](#) | [Budget Review](#) | [Salary Review](#)

Budget Summary Report

File Format

Version	Department	Fund	Program	Project
Working	MSN_06	F_100	P_0	No_Project_MSN

Selecting the versions highlighted in red will only return partial or no information for the report.



Select a Member

Version
Working

Search Version

Version	
Variance_Versions	Base
Working	Adj
Final	
Revised	
PlanV1	
PlanV2	
PlanV3	
Status_Version	

Members: Version > Working

Budget Summary in HTML Format

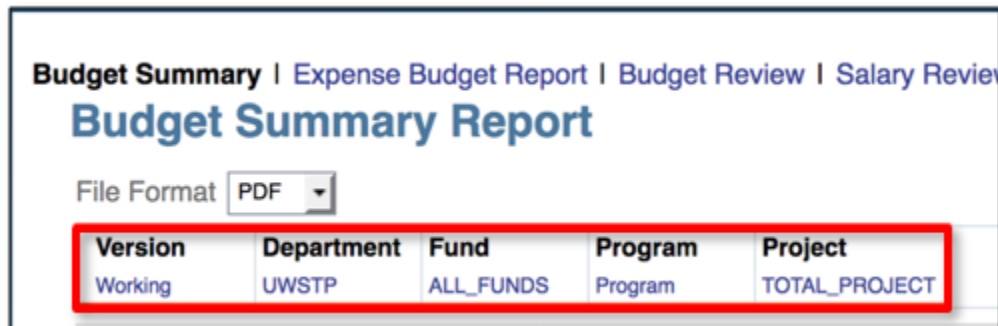
Step 1.

The Budget Reports page will open the Budget Summary tab automatically. The rest of the available reports are displayed on the following tabs.



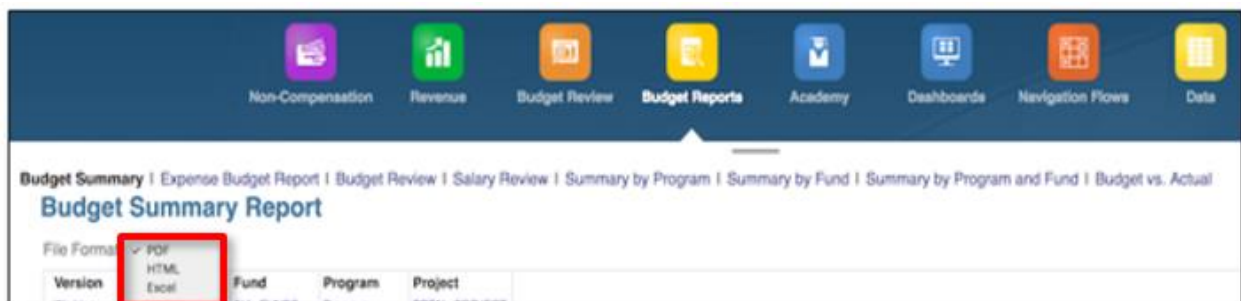
Step 2.

Next, the Point of View should be updated to the data needed for the report.



Step 3.

From the File Format drop-down, select the format desired. For this section of the presentation, select HTML



Step 4. Reviewing the Report in HTML

HTML Budget Summary reports are interactive: Columns expand or collapse and the user has access to expand data to more granular levels:

(The Year Column expands to monthly data by clicking on the drop down icon)

Budget Summary Report

File Format: HTML

Version: Working | Department: UWSTP | Fund: ALL_FUNDS | Program: Program | Project: TOTAL_PROJECT

Budget Summary Report

Year columns can be expanded to see monthly data

Rows Expand or Collapse

	2016 - 2017	2017 - 2018	2018 - 2019	2019 - 2020	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024
	Actual	Actual	Actual	Budget	Budget	Budget	Budget	Budget
	Final	Final	Final	Final	Revised	Working	CY vs. PY	
	Year Total	Year Total	Aug YTD	Year Total	Year Total	Year Total	Budget (\$)	
Revenue and Operating Transfers								
▶ Tuition	\$55,630,002	\$54,534,987	\$6,043,326	-	-	\$13,140,944	\$13,140,944	
▶ Application Fees	\$215,542	\$219,163	\$7,195	-	-	\$3,333	\$3,333	
▶ Continuing Ed Fees	\$1,399,445	\$1,688,035	\$120,469	-	-	-	-	
▶ 9194 - Midwest Higher Education Exchange Program Revenue	\$1,277,927	\$1,453,131	\$76,707	-	-	\$5,454	\$5,454	
▶ Misc Fee	\$8,969,323	\$480,792	\$4,831,910	-	-	\$15	\$15	
▶ 9199 - Minnesota Reciprocity	\$179,068	\$242,833	\$9,732	-	-	\$6,000	\$6,000	
▶ 9230 - Federal Aid	\$50,183,166	\$51,017,477	\$505,956	-	-	-	-	
▶ 9240 - State Appropriations	-	\$90,217,635	-	-	-	-	-	

HTML Reports can also be **downloaded**. To download the report, scroll down and click on the **Export In Query-Ready Mode**. The report will open in Excel. Follow the protocol of your browser to open the downloaded file (For Chrome, the file download bar shows on the bottom of the screen, etc.)

▶ Capital Expense	\$7,244,171	\$1,193,673	\$385,097	-	-	\$5,500	\$5,500
▶ Aid to Individuals & Organizations	\$59,183,650	\$62,422,409	\$3,787,576	-	-	-	-
▶ Special Purpose	\$144,221	\$150,696	-	-	-	-	-
▶ Debt Service	\$16,545,545	\$17,012,220	-	-	-	-	-
▶ Sales Credits	\$12,629,160	\$13,814,333	\$1,562,368	-	-	-	-
Non Salary & Wages	\$119,654,271	\$114,024,301	\$9,365,167	-	-	\$832,294	\$832,294
Expenses	\$219,205,484	\$215,338,890	\$22,786,386	-	-	\$2,124,618	\$2,124,618
Expenses (excluding Fringe)	\$190,123,742	\$185,951,028	\$17,295,672	-	-	\$1,763,853	\$1,763,853
Statement of Activities	\$53,966,183	\$55,839,348	\$13,392,674	-	-	\$11,043,671	\$11,043,671

Export In Query-Ready Mode

Report: Budget Summary Report

Run by: mtybowski@huronconsultinggroup.com

2018-10-05

1:37:46

POV - Version: Working, Department: UW STP ALL (STP), Project: Project Total,Fund: Fund Total, Program: Program

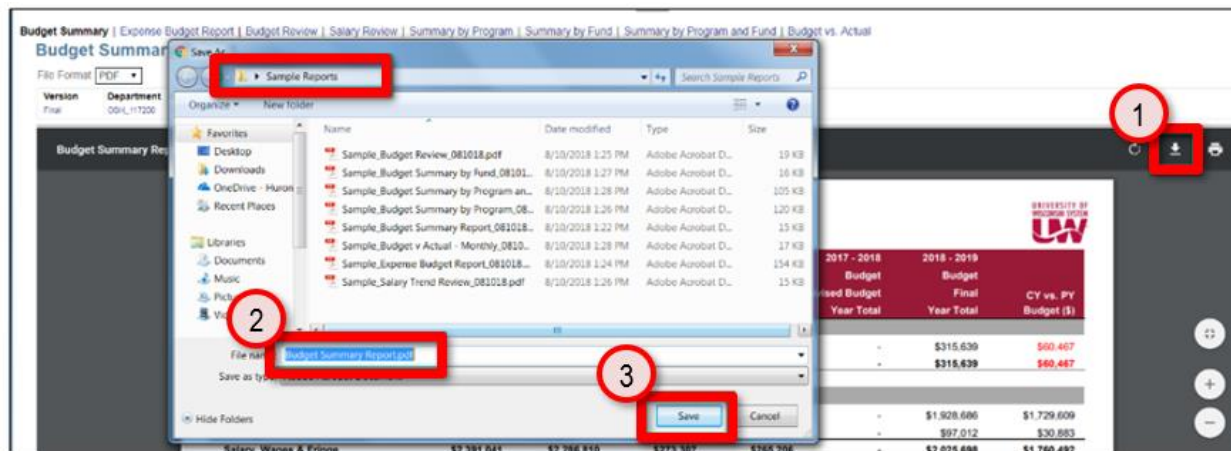
Budget Summary in PDF Format - Chrome

Step 1.

To download reports:

1. Click the download icon (*the pop-up Save As will appear*)
2. Name the report on the File Name field
3. Save the file.

* Remember where the file is saved!



Open the file once downloaded and it will display in PDF format.

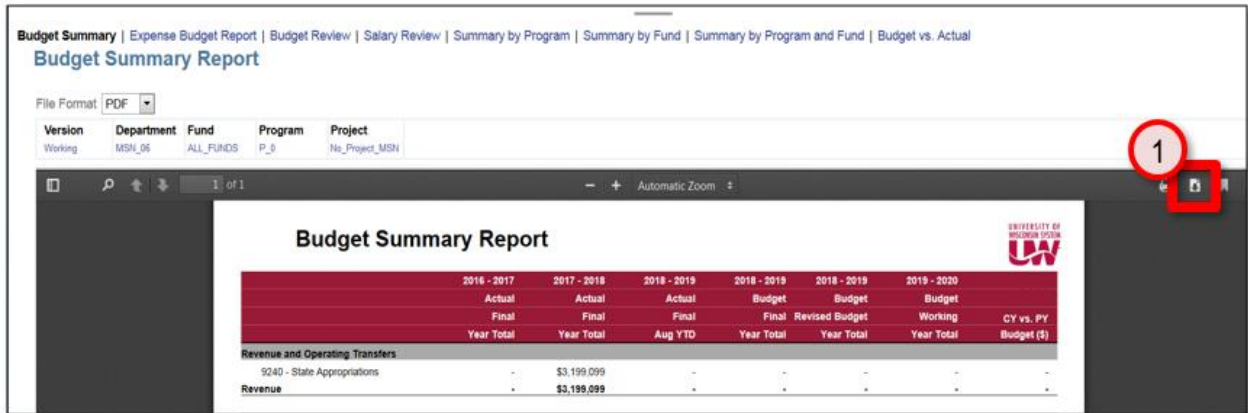
Budget Summary Report.pdf - Adobe Acrobat Reader DC

	2015 - 2016 Actual Final Year Total	2016 - 2017 Actual Final Year Total	2017 - 2018 Actual Final Jul YTD	2017 - 2018 Budget Final Year Total	2017 - 2018 Budget Revised Budget Year Total	2018 - 2019 Budget Final Year Total
Revenue and Operating Transfers						
9240 - State Appropriations	\$2,421,758	\$2,179,576	\$263,065	\$255,173	-	\$315,639
Revenue	\$2,421,758	\$2,179,576	\$263,065	\$255,173	-	\$315,639
Expenses						
Salary	\$1,702,697	\$1,579,375	\$205,234	\$199,077	-	\$1,928,686
Fringe	\$688,344	\$707,436	\$68,073	\$66,129	-	\$97,012
Salary, Wages & Fringe	\$2,391,041	\$2,286,810	\$273,307	\$265,206	-	\$2,025,698
Supplies and Expense	\$30,717	\$14,515	\$12,006	\$11,646	-	\$14,556
Non Salary & Wages	\$30,717	\$14,515	\$12,006	\$11,646	-	\$14,556
Expenses	\$2,421,758	\$2,301,326	\$285,314	\$276,852	-	\$2,040,254
Expenses (excluding Fringe)	\$1,733,413	\$1,593,890	\$217,240	\$210,723	-	\$1,943,242
Statement of Activities	-	\$121,750	\$22,249	\$21,679	-	\$1,724,615

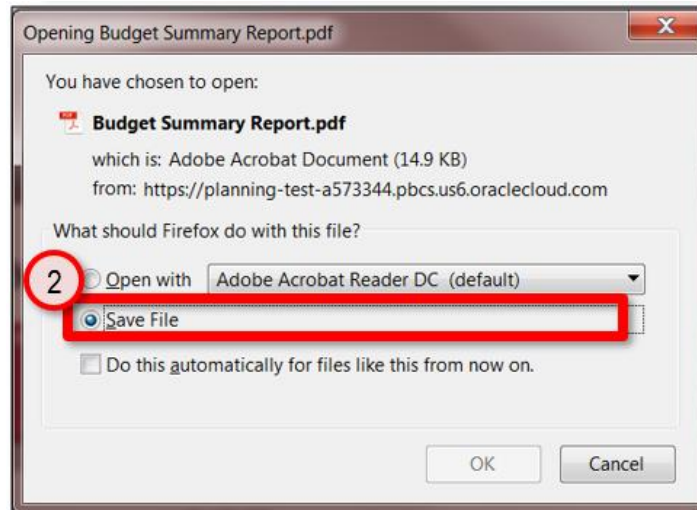
Budget Summary in PDF Format - Firefox

Step 1.

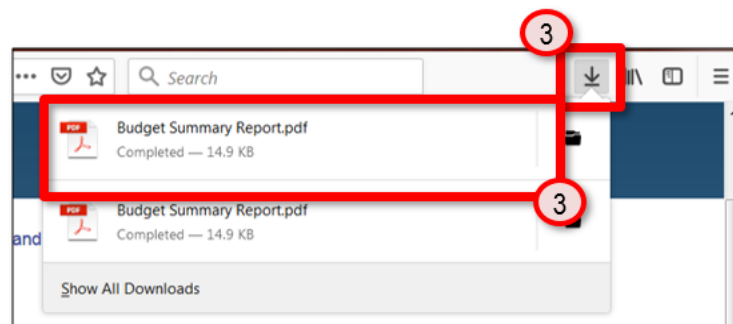
1. Click the download icon (the pop-up Save As will appear)



2. Click on Save File.



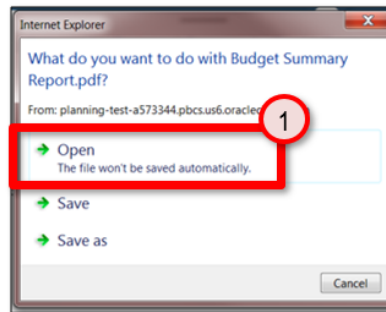
3. The top right corner of the browser will display the download icon. Click on it and click on the file once the download completes



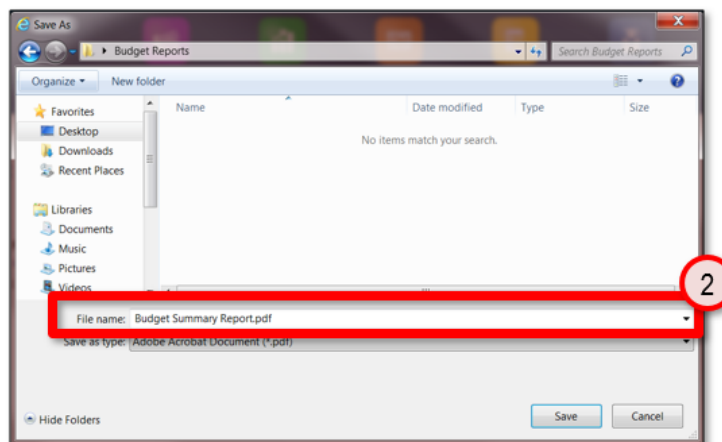
Budget Summary in PDF Format - IE

Step 1.

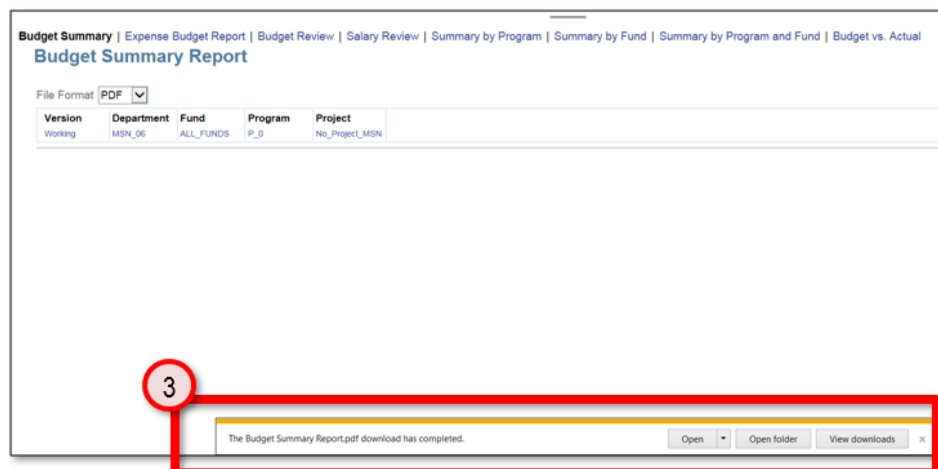
1. Click the **Open** option (**Save** or **Save as** if desired)



2. Name the report on the **File Name** field



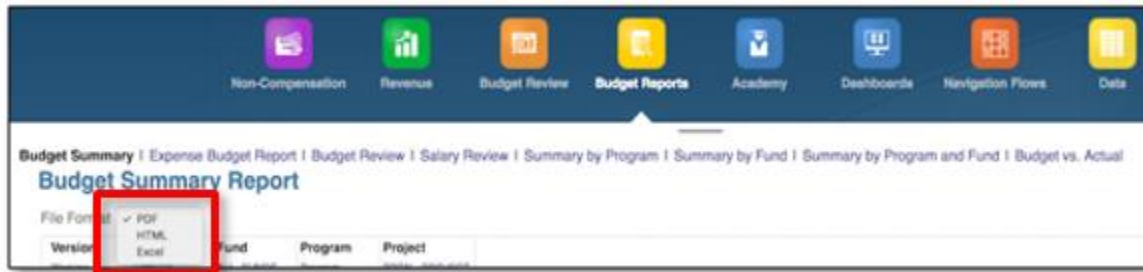
3. Click on **Open**



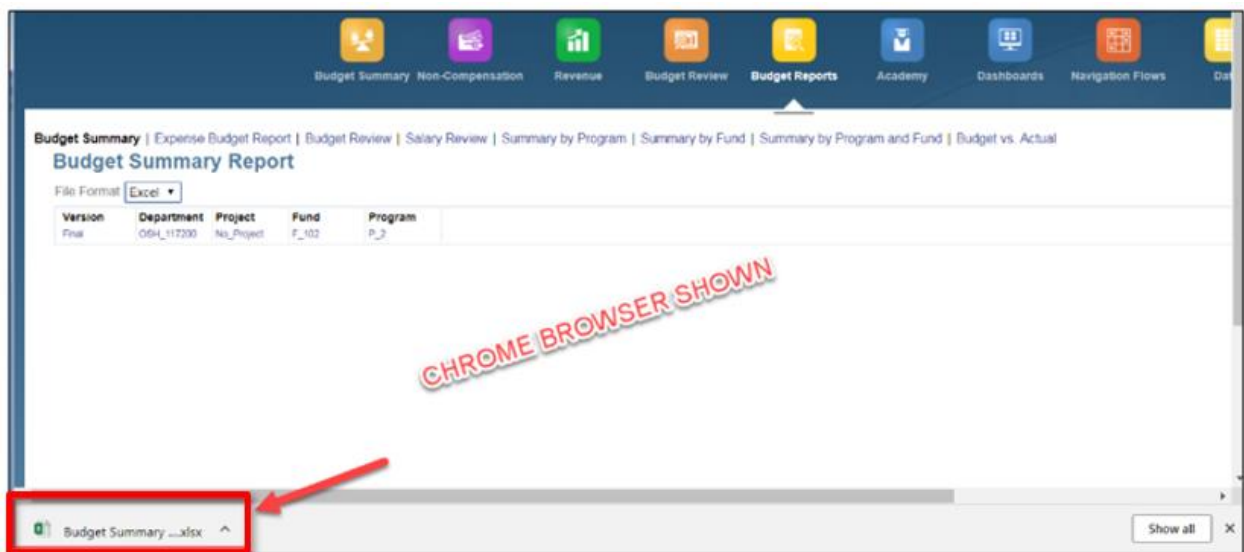
Budget Summary in Excel Format

Step 1.

To open a report in Excel format, remember to follow the same steps to access reports. Once a Point of View for the data the report should contain, select the Excel option from the Version drop-down.



This time, the report will download automatically. Follow the steps described before according to the browser you are using (Chrome, Firefox, Internet Explorer)



Step 2.

The Excel file is now downloaded and can be opened.

	2015 - 2016	2016 - 2017	2017 - 2018	2017 - 2018	2017 - 2018	2018 - 2019	
	Actual	Actual	Actual	Budget	Budget	Budget	
	Final	Final	Final	Final Revised Budget		Final	CY vs. PY
	Year Total	Year Total	Jul YTD	Year Total	Year Total	Year Total	Budget (\$)
Revenue and Operating Transfers							
9240 - State Appropriations	\$2,421,758	\$2,179,576	\$263,065	\$255,173	-	\$315,639	\$60,467
Revenue	\$2,421,758	\$2,179,576	\$263,065	\$255,173	-	\$315,639	\$60,467
Expenses							
Salary	\$1,702,697	\$1,579,375	\$205,234	\$199,077	-	\$1,928,686	\$1,729,609
Fringe	\$688,344	\$707,436	\$68,073	\$66,129	-	\$97,012	\$30,883
Salary, Wages & Fringe	\$2,391,041	\$2,286,810	\$273,307	\$265,206	-	\$2,025,698	\$1,760,492
Supplies and Expense	\$30,717	\$14,515	\$12,006	\$11,646	-	\$14,556	\$2,910
Non Salary & Wages	\$30,717	\$14,515	\$12,006	\$11,646	-	\$14,556	\$2,910
Expenses	\$2,421,758	\$2,301,326	\$285,314	\$276,852	-	\$2,040,254	\$1,763,402
Expenses (excluding Fringe)	\$1,733,413	\$1,593,890	\$217,240	\$210,723	-	\$1,943,242	\$1,732,519
Statement of Activities	\$0	\$121,750	\$22,249	\$21,679	-	\$1,724,615	\$1,702,935



Remember - When the downloaded file is opened in Excel, the file loses its connection to the database. The file, however, can now be manipulated with Excel functions. **Also remember that the file is not connected via Smart View.**

Expense Budget Report in HTML

Step 1.

To access the Expense Budget report, as mentioned, follow the previous steps described. Once the form displays, select the Expense Budget Report tab and desired format, as described before.

Budget Summary | **Expense Budget Report** | Budget Review | Salary Review | Summary by Program | Summary by Fund | Summary by Program and Fund | Budget vs. Actual

Expense Budget Report

File Format: **HTML**

Department: **UWOSH** | Version: **Base** | Project: **No_Project_OSH**

Once the report displays, depending on the format, you can now interact with it.

Non-Compensation

Revenue

Budget Review

Budget Reports

Academy

Dashboards

Data

[Budget Summary](#) |
[Expense Budget Report](#) |
[Budget Review](#) |
[Salary Review](#) |
[Summary by Program](#) |
[Summary by Fund](#) |
[Summary by Program and Fund](#) |
[Budget vs. Actual](#)

Expense Budget Report

File Format

HTML

Department

Version

Project

UWOSH

Base

No_Project_OSH

[Budget Summary](#) |
[Expense Budget Report](#) |
[Budget Review](#) |
[Salary Review](#) |
[Summary by Program](#) |
[Summary by Fund](#) |
[Summary by Program and Fund](#) |
[Budget vs. Actual](#)

Expense Budget Report

File Format

HTML

Department

Version

Project

UWOSH

Base

No_Project_OSH

Expense Budget Report

2019 - 2020											
Input											
Budget											
Total Year											
Department	Fund	Program	Faculty Salary	Academic Staff Salary	University Staff Salary	LTE Salary	Student Salary	Salary	Fringe	Salary, Wages & Fringe	Expenses
UW OSH ALL_ORGS (OSH)	Fund Total	0 - Student Services	\$4,710	\$6,377,727	\$1,483,284	\$116,317	\$1,471,431	\$9,453,469	\$104,010	\$9,557,479	\$9,557,479
		1 - Institutional Support	\$64,386	\$3,861,163	\$2,104,698	\$22,507	\$339,777	\$6,392,531	-	\$6,392,531	\$6,392,531
		2 - Instruction	\$22,387,559	\$10,554,052	\$2,333,744	\$396,684	\$427,736	\$36,099,775	\$14,112	\$36,113,887	\$36,113,887
		4 - Research	\$8,451	\$271,202	\$51,314	-	\$58,539	\$389,506	-	\$389,506	\$389,506
		5 - Public Service	-	\$746,461	\$192,647	\$228,303	\$285,025	\$1,452,436	-	\$1,452,436	\$1,452,436
		6 - Academic Support	\$84,760	\$5,205,959	\$1,948,273	\$101,773	\$1,081,303	\$8,422,068	-	\$8,422,068	\$8,422,068
		7 - Operation and Maintenance	-	-	-	-	-	-	-	-	-

Budget Review Report in HTML

Step 1.

To access the Expense Budget report, as mentioned, follow the previous steps described. Once the form displays, select the Expense Budget Report tab and desired report format, as described before.

The screenshot shows the PlanUW interface with the 'Budget Review' tab selected. The 'File Format' dropdown is set to 'HTML'. Below the dropdown, the following fields are visible:

Version	Department	Fund	Program	Project
Base	UWOSH	ALL_FUNDS	P_2	No_Project_OSH

Once the report displays, depending on the format, you can now interact with it.

The screenshot shows the PlanUW interface with the 'Budget Review' tab selected. The 'File Format' dropdown is set to 'HTML'. Below the dropdown, the following fields are visible:

Version	Department	Fund	Program	Project
Base	UWOSH	ALL_FUNDS	P_2	No_Project_OSH

Budget Review

UNIVERSITY OF WISCONSIN SYSTEM
UW

	2016 - 2017	2017 - 2018	2018 - 2019	2018 - 2019	2018 - 2019	2019 - 2020	
	Actual	Actual	Actual	Budget	Budget	Budget	
	Final	Final	Final	Final	Revised Budget	Input	CY vs. PY
	Year Total	Year Total	Aug YTD	Year Total	Year Total	Year Total	Budget (\$)
Revenues and Operating Transfers							
▶ Tuition	\$58,596,885	\$56,139,872	\$12,949,629	-	-	-	-
▶ Application Fees	\$346,880	\$345,729	\$16,120	-	-	-	-
▶ 9194 - Midwest Higher Education Exchange Program Revenue	\$1,442,774	\$1,621,047	\$426,504	-	-	-	-
▶ Misc Fee	\$13,046,943	\$16,612,930	\$3,891,303	-	-	-	-
▶ 9199 - Minnesota Reciprocity	\$42,612	\$46,769	\$9,490	-	-	-	-
▶ 9230 - Federal Aid	\$5,846,601	\$5,369,511	\$1,248,925	-	-	-	-
▶ 9240 - State Appropriations	-	\$46,744,626	-	-	-	\$1,700,000	\$1,700,000

Salary Review Report in HTML

Step 1.

To access the Salary Review report, as mentioned, follow the previous steps described. Once the form displays, select the Salary Review tab and desired file format, as described before.

Salary Trend Review

File Format: PDF

Version	Department	Fund	Program	Project
Base	UWOSH	ALL_FUNDS	P_2	No_Project_OSH

1 of 1

Salary Trend Review

	2016 - 2017	2017 - 2018	2018 - 2019	2018 - 2019	2018 - 2019	2019 - 2020	
	Actual	Actual	Actual	Budget	Budget	Budget	
	Final	Final	Final	Final	Revised Budget	Input	CY vs. PY
	Year Total	Year Total	Aug YTD	Year Total	Year Total	Year Total	Budget (\$)
Salary Comparison							
Faculty FTE	-	-	-	-	-	300	(300)
Academic Staff FTE	-	-	-	-	-	193	(193)
University Staff FTE	-	-	-	-	-	62	(62)

In this example, the form is displayed under a PDF format. Remember that PDF file formats allow the use to print the form directly!

Salary Trend Review

File Format: PDF

Version	Department	Fund	Program	Project
Base	UWOSH	ALL_FUNDS	P_2	No_Project_OSH

1 of 1

Salary Trend Review

	2016 - 2017	2017 - 2018	2018 - 2019	2018 - 2019	2018 - 2019	2019 - 2020	
	Actual	Actual	Actual	Budget	Budget	Budget	
	Final	Final	Final	Final	Revised Budget	Input	CY vs. PY
	Year Total	Year Total	Aug YTD	Year Total	Year Total	Year Total	Budget (\$)
Salary Comparison							
Faculty FTE	-	-	-	-	-	300	(300)
Academic Staff FTE	-	-	-	-	-	193	(193)
University Staff FTE	-	-	-	-	-	62	(62)

Summary by Program Report in HTML

Step 1.

Like all reports, the Summary by Program report is opened following the same steps.

The screenshot shows the PlanUW interface for the 'Budget Summary by Program' report. The 'File Format' dropdown is set to 'HTML'. The report displays a table of expenses by program for various fiscal years, with the University of Wisconsin System logo on the right.

Budget Summary by Program
Expenses

Page: A_EXPENSE

	2016 - 2017	2017 - 2018	2018 - 2019	2018 - 2019	2018 - 2019	2019 - 2020	
	Actual	Actual	Actual	Budget	Budget	Budget	
	Final	Final	Final	Final	Revised Budget	Input	CY vs. PY
Program	Year Total	Year Total	Ann YTD	Year Total	Year Total	Year Total	Budget (\$)
0 - Student Services	\$25,652,496	\$26,409,469	\$3,010,206	\$25,387,324	\$25,387,324	\$9,557,479	\$15,829,845
1 - Institutional Support	\$13,108,699	\$12,379,148	\$2,294,791	\$10,976,015	\$10,976,015	\$6,392,531	\$4,583,484
2 - Instruction	\$73,114,074	\$74,470,586	\$7,457,604	\$69,508,030	\$69,508,030	\$36,113,887	\$33,394,143
4 - Research	\$2,490,115	\$2,144,161	\$497,549	\$1,517,893	\$1,517,893	\$389,506	\$1,128,387
5 - Public Service	\$4,976,870	\$4,852,339	\$1,077,015	\$5,342,830	\$5,342,830	\$1,452,436	\$3,890,394
6 - Academic Support	\$15,490,467	\$15,205,087	\$3,016,746	\$17,594,502	\$17,594,502	\$8,422,068	\$9,172,434
7 - Operation and Maintenance of Physical Plant	\$22,780,050	\$19,975,891	\$1,408,400	\$21,827,172	\$21,827,172	\$4,364,143	\$17,463,029

Summary by Fund Report in HTML

Step 1.

Like all reports, the Summary by Fund report is opened following the same steps.

Budget Summary | Expense Budget Report | Budget Review | Salary Review | Summary by Program | **Summary by Fund** | Summary by Program and Fund | Budget vs. Actual

Budget Summary by Fund

File Format: **HTML**

Version	Department	Program	Project
Base	UWOSH	P_2	No_Project_OSH

Budget Summary by Fund

	2019 - 2020									
	Budget									
	Year Total									
	Input									
	CGPR/Tuition	TUI	TB	ALX	OP REC	ICR	GGC	OTHER	FA	REV
Revenue										
↳ 9240 - State Appropriations	\$1,700,000	-	-	-	-	-	-	-	-	-
Revenue	\$1,700,000									
Expenses										
↳ Salary	\$30,166,511	\$3,902,888	-	\$12,231	\$1,363,915	-	\$518,043	-	\$136,187	-
↳ Fringe	\$4,000	\$10,112	-	-	-	-	-	-	-	-
Salary, Wages & Fringe	\$30,170,511	\$3,913,000		\$12,231	\$1,363,915		\$518,043		\$136,187	

Summary by Program and Fund in HTML

Step 1.

Like all reports, the Summary by Program and Fund report is opened following the same steps.

The screenshot shows the PlanUW interface with the 'Budget Reports' menu highlighted. The 'Summary by Program and Fund' option is selected. The report is displayed in HTML format, showing a table of expenses for the 2019-2020 fiscal year. The table is titled 'Budget Summary by Program and Fund Expenses' and includes a 'Page: A_EXPENSE' indicator. The table columns include Program, GPR/Tuition, TUH, TB, AUX, OP REC, ICR, OGC, OTHER, FFA, REV, Temp Fund, and Fund Total. The data is organized by program, with sub-totals for each program and a grand total at the bottom.

Program	GPR/Tuition	TUH	TB	AUX	OP REC	ICR	OGC	OTHER	FFA	REV	Temp Fund	Fund Total
0 - Student Services	\$4,232,342	\$424,708	-	\$4,351,438	\$56,420	-	\$328,591	-	\$163,980	-	-	\$9,557,479
1 - Institutional Support	\$5,227,333	-	-	\$696,249	\$429,350	-	-	-	\$39,599	-	-	\$6,392,531
2 - Instruction	\$30,170,511	\$3,913,000	-	\$12,231	\$1,363,915	-	\$518,043	-	\$136,187	-	-	\$36,118,887
4 - Research	\$124,718	-	-	-	\$12,750	\$180,792	\$69,984	-	\$1,262	-	-	\$389,506
5 - Public Service	\$414,568	-	-	\$263,250	\$158,054	-	\$475,354	\$136,079	\$5,131	-	-	\$1,452,436
6 - Academic Support	\$7,169,796	\$584,907	\$20,000	\$403,917	\$30,325	-	-	-	\$213,133	-	-	\$8,422,068
7 - Operation and Maintenance of Physical Plant	\$4,361,636	-	-	-	-	-	-	-	\$2,507	-	-	\$4,364,143

Budget Vs Actual Report in HTML

Step 1.

Like all reports, the Budget and Actual report is opened following the same steps.

Budget vs. Actual - Monthly

File Format: **HTML**

Department: UWOSH | Fund: ALL_FUNDS | Program: P_2 | Project: No_Project_OSH

Budget vs. Actual - Monthly

UNIVERSITY OF WISCONSIN SYSTEM
UW

	2018 - 2019 Actual Final	2018 - 2019 Budget Revised Budget	Variance - Actual vs. Budget	
	Aug YTD	Aug YTD	(\$)	(%)
Revenues and Operating Transfers				
↳ Tuition	\$12,949,629	-	(\$12,949,629)	
↳ Application Fees	\$16,120	-	(\$16,120)	
↳ 9194 - Midwest Higher Education Exchange Program Revenue	\$426,504	-	(\$426,504)	
↳ Misc Fee	\$3,891,303	-	(\$3,891,303)	
↳ 9199 - Minnesota Reciprocity	\$9,490	-	(\$9,490)	
↳ 9230 - Federal Aid	\$1,248,925	-	(\$1,248,925)	
↳ Misc. Revenue	\$446,721	-	(\$446,721)	
↳ Gifts/Donations/Grants	\$30,350	-	(\$30,350)	
↳ 9905 - Federal Admin Overhead	\$40,119	-	(\$40,119)	

Smart View Visual Reference

ORACLE®

SMART VIEW

SMART VIEW HOME PAGE

The screenshot displays the Microsoft Excel interface with the 'Smart View' add-in. The ribbon is set to 'Planning Ad Hoc', showing various analysis and data management tools. The main worksheet area shows a grid with columns A through R and rows 1 through 29. A context menu is open over cell C3, providing options to change the Scenario, Version, Project, Fund, or Program, along with a Refresh button. On the right, the 'Smart View' task pane is visible, showing 'Shared Connections' for 'EPM Cloud' and a hierarchical tree view of the data model. The tree view includes dimensions such as Library, Admin Forms, User Forms, Budget Review, Input Forms, Expenses, and Revenues, as well as Task Lists like PlanUW and PlanUWRp. The status bar at the bottom indicates the worksheet is 'Ready' and the zoom level is 100%.

PLANNING TAB ICON DESCRIPTION

The screenshot shows the Oracle Planning application interface with the Planning tab selected. The ribbon contains various icons for data manipulation and analysis. Callout boxes provide descriptions for the following icons:

- Zoom In**: Retrieve data for the selected members as specified for Zoom In Level in Smart View Options, or select from the drop-down menu.
- Zoom Out**: Zoom out on data in the selected cell.
- Member Selection**: Select members for the POV.
- Cascade**: Create separate reports for members of one dimension on separate sheets in a worksheet. You can cascade reports in the current workbook or in a new workbook.
- Cell Actions**: Perform actions on or view information associated with the selected cell.
- Submit Data**: Save data updates in the worksheet to the data source.
- Task List**: Guide users through their process.
- Pivot**: Pivot a dimension or member.
- Remove Only**: Delete all selected members and associated data.
- Keep Only**: Delete all members and associated data except the selected members.
- Change Alias**: Select an alias table for the grid.
- Refresh**: Refresh the data on the current worksheet from the data source.
- Adjust**: Select options for adjusting the value of the selected data cells.
- Calculate**: Select options for calculating data..
- POV**: Use dropdowns to choose members.

The interface also shows the Smart View ribbon with options like Keep Only, Remove Only, Preserve Format, Save Ad Hoc Grid, Insert Attributes, Cascade, Refresh, and POV. The main grid displays data for the Planning tab, and the Smart View pane on the right shows the EPM Cloud connection and a list of dimensions and forms.

SMART VIEW TAB ICON DESCRIPTION

The image shows the Microsoft Excel interface with the **Smart View** tab selected. The ribbon contains the following groups: **Panel**, **Connections**, **Undo**, **Copy**, **Paste**, **Functions**, **Refresh**, **Submit Data**, **Options**, **Help**, **Sheet Info**, and **More**. A **Smart View** task pane is open on the right side of the window, showing a tree view of data sources.

Callout boxes provide descriptions for the following icons:

- Panel**: Access and manage shared and private connections, task lists, and extensions.
- Undo**: Undo the previous ad hoc operation.
- Sheet Info**: Display general and connection info for worksheet.
- Connections**: Display active or recently used connections, reset the current connection to default, or access Reporting and Analysis documents.
- Submit Data**: Data should be entered at Level 0 and submitted once the spreadsheet is completed.
- Options**: Set a variety of options for working with Smart View including Member, Data, Advanced, Formatting, Cell Style and Extension Options.
- Panel**: Access and manage shared and private connections, task lists, and extensions.

Annex

Opening Budget Accounts – Right-Click Method

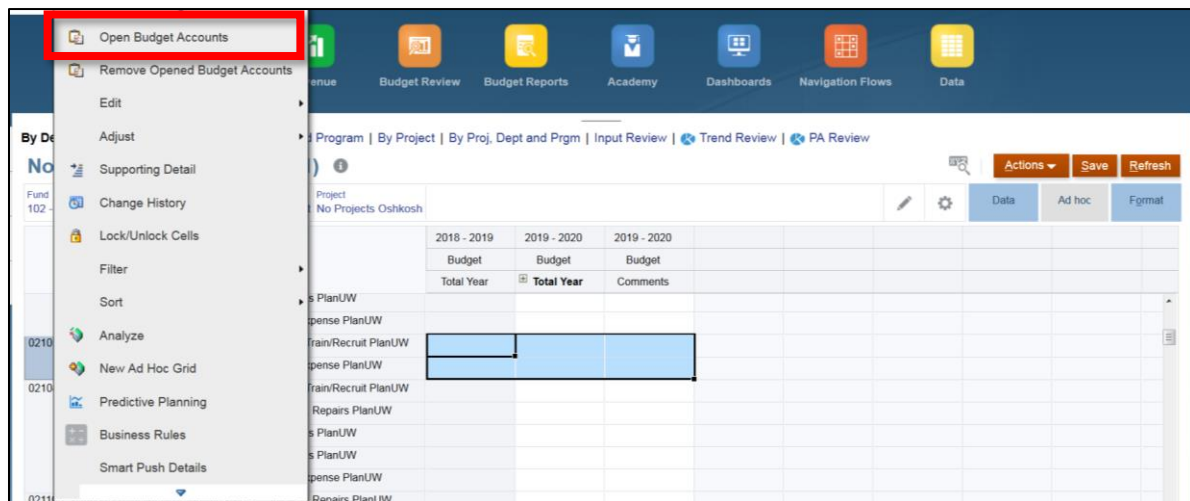
If the sub department you need to budget for is already on the form, but the account you need is not, the right click method can be used to open budget accounts. This method will save you time because the sub department you right click on will pass into the menu prompt. This is in contrast to the original method when the sub department is not on the form, so you need to use the actions menu instead.

To open budget accounts using the right click method please follow the steps below:

Step 1.

In this scenario, \$5,000 needs to be budgeted for **Equipment PlanUW** in the **021010 – Provost Support (OSH)** sub department. **021010 – Provost Support (OSH)** is on the form, but Equipment PlanUW is not.

Once the POV has been selected and the form is displayed (Step 1 of page 22), right-click on the department that the account needs to be inserted into to display the **Actions** drop-down (For this example, right-click on **021010 – Provost Support (OSH) Department**):



Step 2.

Click on **Open Budget Accounts** to bring up the menu screen. You should notice that the **Select Department** field is already populated with the information from the sub department you right-clicked on. Click **Launch** (In this example, the field will display OSH_021010).

Insert_Wedge_NonComp_L1

* Select Project

"No_Project_OSH"

* Select Fund

"F_102"

* Select Program

"P_6"

* Select Department

"OSH_021010"

Launch

Cancel

Step 3.

Once the accounts are inserted, the form will display all the budget accounts for the level you are at for the specific sub department:

By Department | By Program | By Department and Program | By Project | By Proj. Dept and Prgm | Input Review | Trend Review | PA Review

NonComp Budget by Dept (L1)

Fund: 102 - GPO - Non-Doctoral Cluster | Program: 6 - Academic Support | Project: No Projects Oshkosh

021010 - Provost Support (OSH)

Information: Insert_Wedge_NonComp_L1 was successful. OK

- Services PlanUW
- Misc Expense PlanUW
- Travel/Train/Recruit PlanUW
- Maint & Repairs PlanUW
- Utilities PlanUW
- Supplies PlanUW
- Services PlanUW
- Misc Expense PlanUW
- Equipment PlanUW
- Misc Capital Expense PlanUW
- 5708 - Aids to Organizations
- 5750 - Student Loans
- Special Purpose PlanUW
- Debt Service PlanUW
- Sales Credits PlanUW
- 3790 - Material for Resale

Step 4.

Enter **\$5,000** under **Equipment PlanUW**, click on **Save**, and click **OK**.

By Department | By Program | By Department and Program | By Project | By Proj. Dept and Prgm | Input Review | Trend Review | PA Review

NonComp Budget by Dept (L1)

Fund: 102 - GPO - Non-Doctoral Cluster | Program: 6 - Academic Support | Project: No Projects Oshkosh

	2018 - 2019	2019 - 2020	2019 - 2020
	Budget	Budget	Budget
	Total Year	Total Year	Comments
Services PlanUW			
Misc Expense PlanUW			
Travel/Train/Recruit PlanUW			
Maint & Repairs PlanUW			
Utilities PlanUW			
Supplies PlanUW			
Services PlanUW			
Misc Expense PlanUW			
Equipment PlanUW		\$5,000	
Misc Capital Expense PlanUW			
5708 - Aids to Organizations			
5750 - Student Loans			
Special Purpose PlanUW			
Debt Service PlanUW			
Sales Credits PlanUW			
3790 - Material for Resale			

Save Refresh

Information

Messages for this page are listed below.

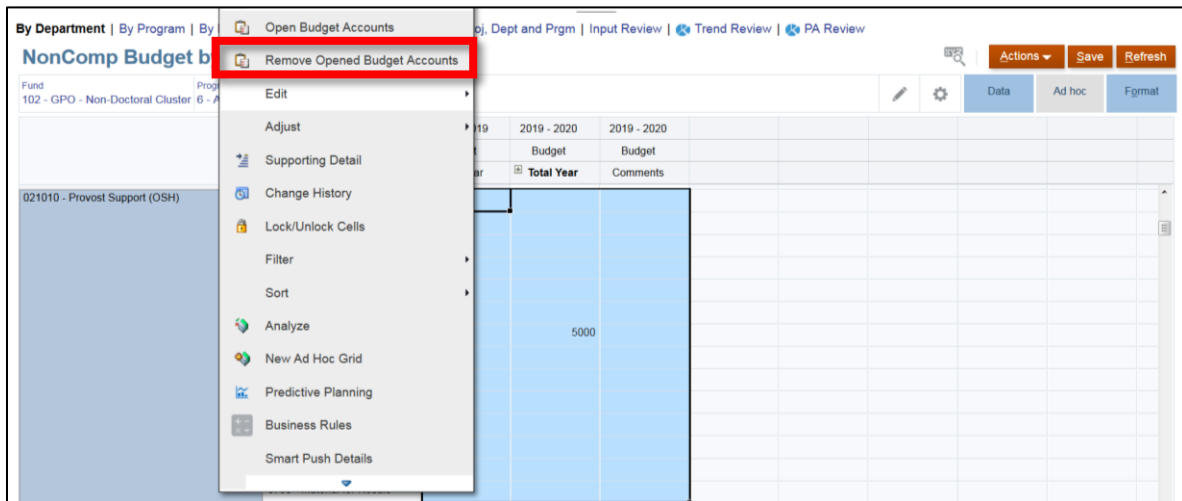
- The data has been saved.
- Rule was run successfully
- Smart Push successfully submitted as background job.

OK

Removing Budget Accounts

To remove the accounts that were inserted and not needed, right-click on the sub department again and select **Remove Opened Budget Accounts** on the drop-down menu.

*Note – It is not required for you to remove the budget accounts you do not need, but you are encouraged to use this functionality if you would like to cleanup your input forms.



Click **Launch**.

Remove_Wedge_NonComp_L1

* Select Project "No_Project_OSH" * Select Program "P_6"

* Select Fund "F_102" * Select Department "OSH_021010"

Launch **Cancel**

[illegible]

NOTES: