PlanUW Processes

Course Objectives

In this course, you will be introduced to the PlanUW process and how to perform budgeting tasks within the PlanUW system.

✓ After completing this class, you will have learned:

The UW Budget Process and Timeline

How to set up your campus User Variable

How to complete budgeting tasks in PlanUW

Before We Begin

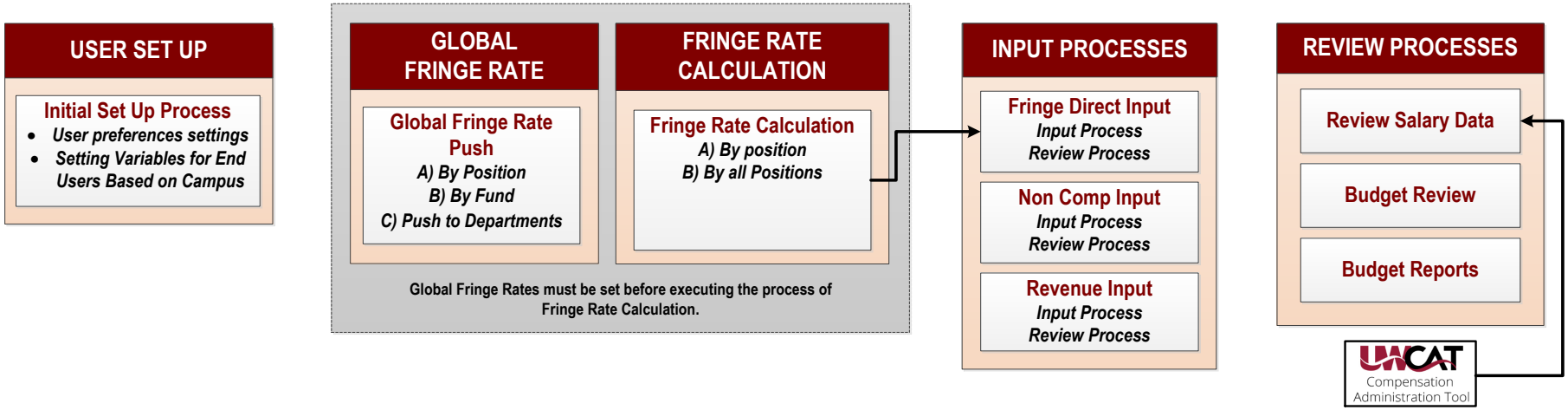
This presentation has been designed with the expectations that End Users follow each process on a step by step basis.

To provide support during and after the training, End Users will receive a Quick Reference Guide as an instructional for each process End Users can execute in PlanUW.

IMPORTANT: When a slide contains this C QRG on the **bottom right section** of the slide, it means that the slide in question is referenced in the **Quick Reference Guide** in the page number contained in the logo. **Remember, you get to take the Quick Reference Guide with you!**

UW Budget Process and Timeline

Budgeting Process



1

USER SET UP

- Users have access to **setting their preferences** when accessing the system
- **Setting User variables** according to institutions.

2

GLOBAL FRINGE RATE

- The **Global Fringe Rate** is executed before initiating the process of Fringe Rate Inputs
- This process can be executed by:

a) **Position**
b) **By Fund**
c) **Push to all departments**.

It is important to remember that users can change rates by funds as necessary.

3

FRINGE RATE CALCULATION

- **Fringe Rate Calculation**

This process can be executed:
a) By a specific position
b) By all positions.

During this step the **Trend and PA Review** process also can be executed.

4

INPUT PROCESSES

During the Input Process steps the user can execute:

- **Fringe Direct Input**

The presentation will demonstrate the input and review process for this process

- **Non Comp Input**

The presentation will demonstrate the input and review process for this process

- **Revenue Input**

The presentation will demonstrate the input and review process for this process

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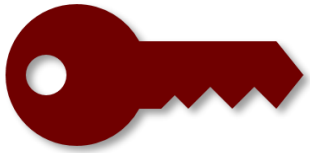
REVIEW PROCESSES

The Review Processes step focuses on processes that allow the user to review:

- Salary & Wage – (Salary information comes from CAT.)
- Budget Data
- Budget Reports

Accessing PlanUW



Accessing PlanUW

PlanUW is a cloud-based and can be accessed via any computer with internet access.

PlanUW is supported by any browser. Out of the browsers shown, we recommend Mozilla Firefox:

Microsoft Edge
v.12

Internet Explorer
v.11.x

Mozilla Firefox
v.38+

Google Chrome
v.42+

Apple Safari
v.8.x and v.7.x

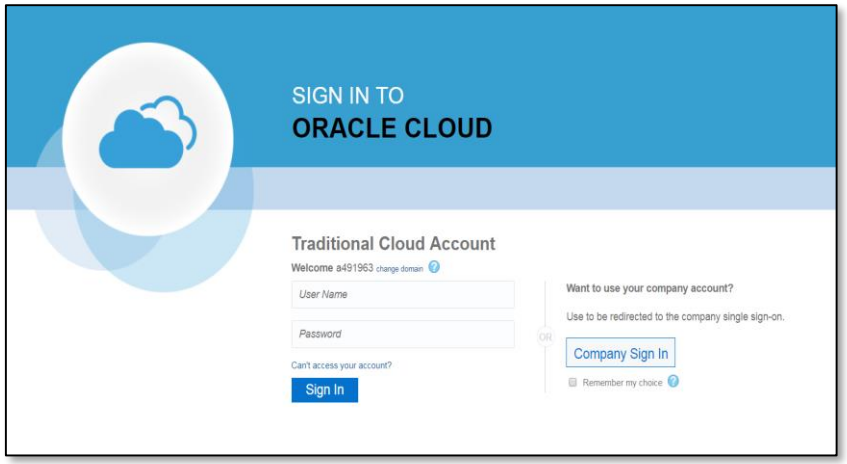
Firefox is the recommended browser

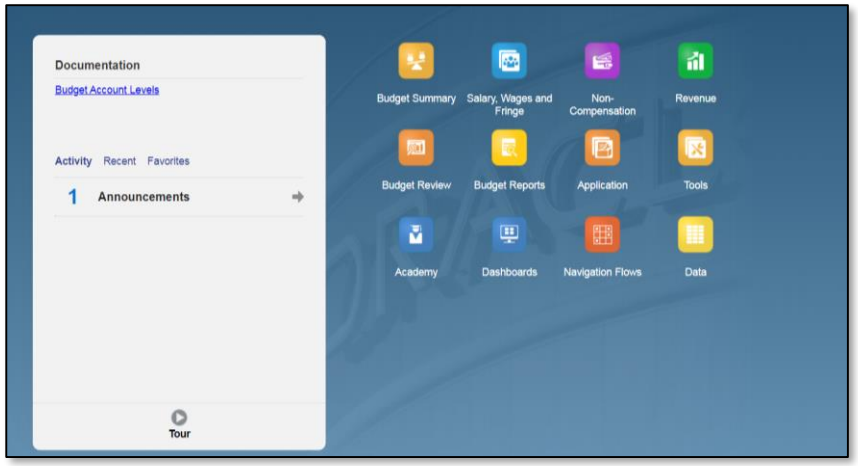
Logging Into PlanUW & The PlanUW Homepage

PlanUW is UW Single Sign On enabled. To log into PlanUW :
https://planning-a573344.pbcs.us6.oraclecloud.com/workspace

1.Click on Company Sign In. This will bring the UW Page
2.Enter your UW credentials and click **Sign In**
3.You will be logged on via Single Sign On by using your Net ID and Password

Once logged in, the PlanUW Home Page is displayed.





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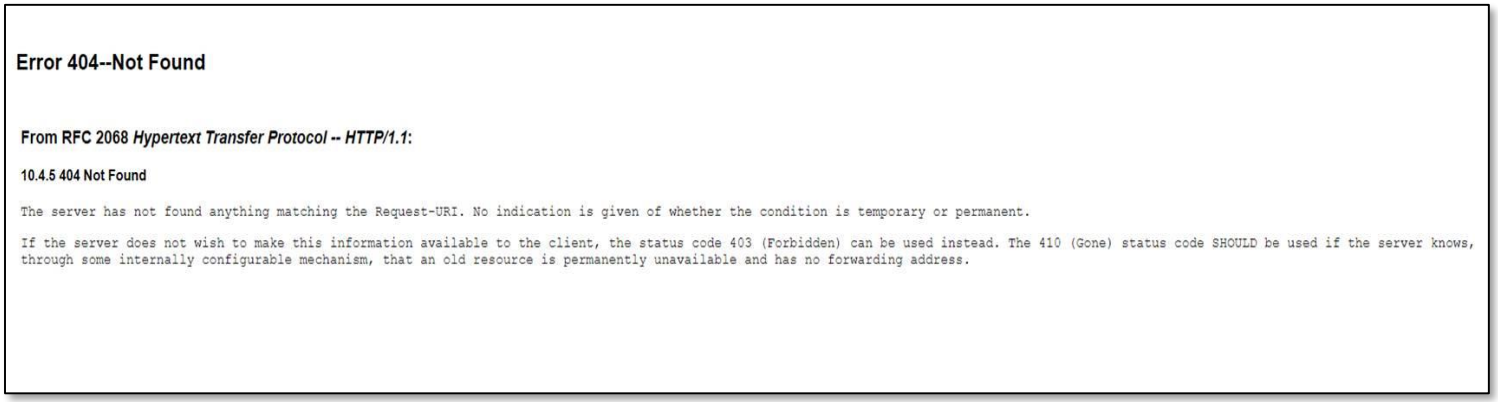
Logging Into PlanUW & The PlanUW Homepage

Some users may see the following screen after logging in. **This does not mean that the user entered incorrect credentials**. This is a known issue with PlanUW.

To by-pass this screen, simply **refresh** the page and the home page should display after the page reloads.



Error 404--Not Found

From RFC 2068 *Hypertext Transfer Protocol -- HTTP/1.1*:

10.4.5 404 Not Found

The server has not found anything matching the Request-URI. No indication is given of whether the condition is temporary or permanent.

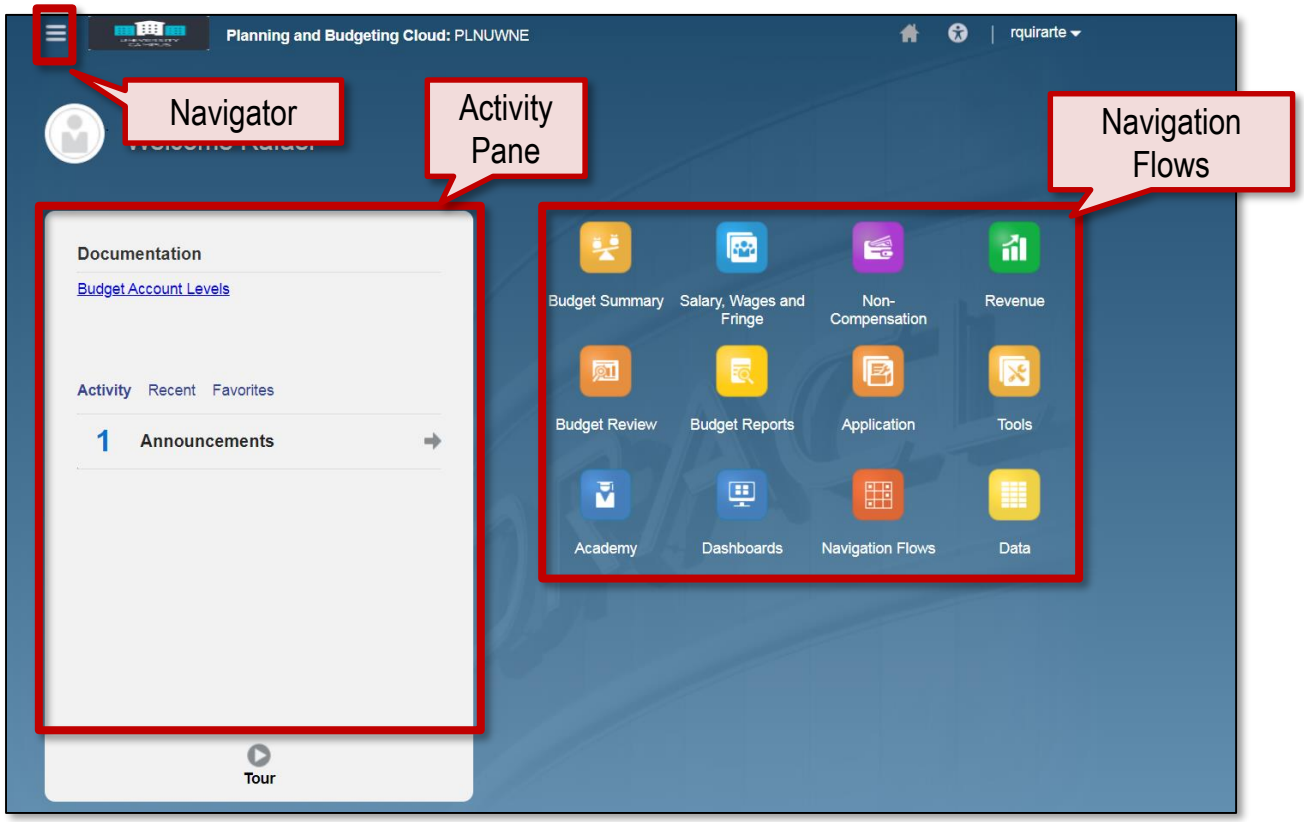
If the server does not wish to make this information available to the client, the status code 403 (Forbidden) can be used instead. The 410 (Gone) status code SHOULD be used if the server knows, through some internally configurable mechanism, that an old resource is permanently unavailable and has no forwarding address.

The PlanUW Homepage

The PlanUW Homepage

The PlanUW Home Page consists of three main regions:

- Navigator
- Activity Pane
- Navigation Flows



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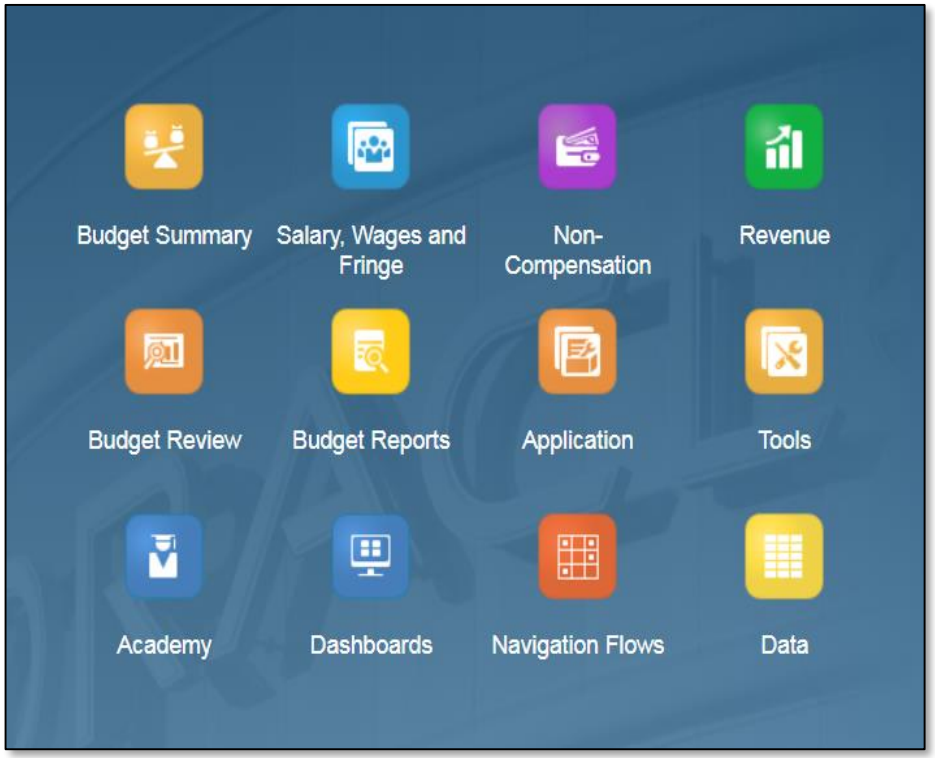
The PlanUW Homepage



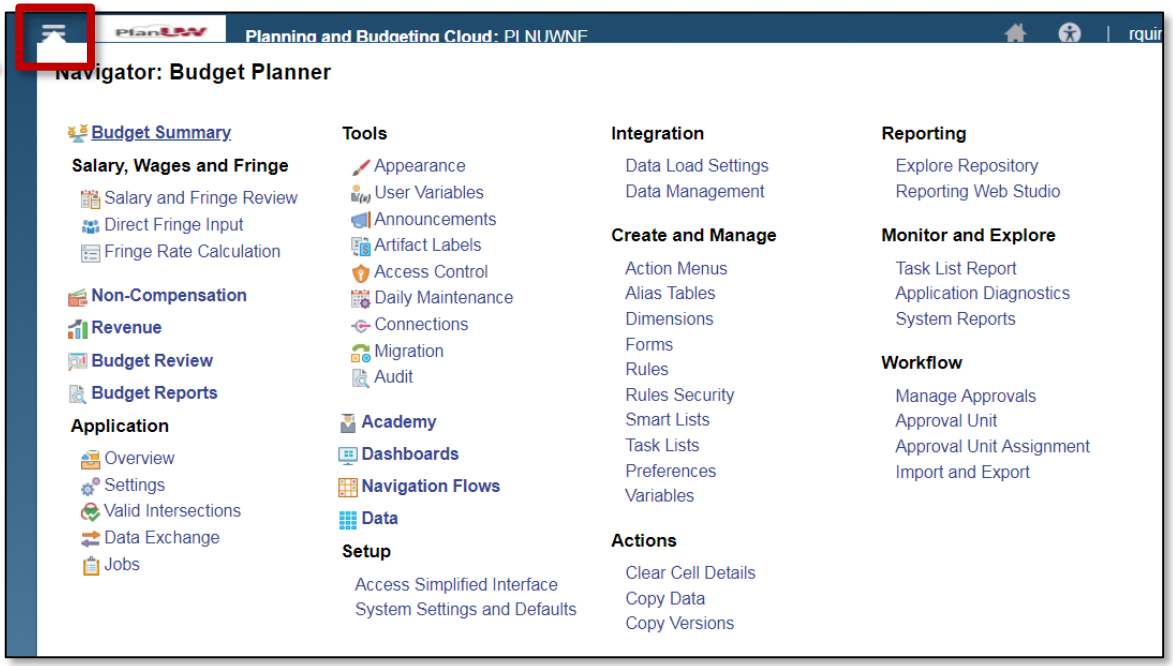
Navigation Flows are a grouping of related content such as forms and reports which support the completion of a particular business process.

- The navigation flows provide you with a very simple and streamlined outline and order to each step in the budgeting process.

The PlanUW Homepage

The **Navigator** shows all forms, tools, and preferences available within PlanUW.

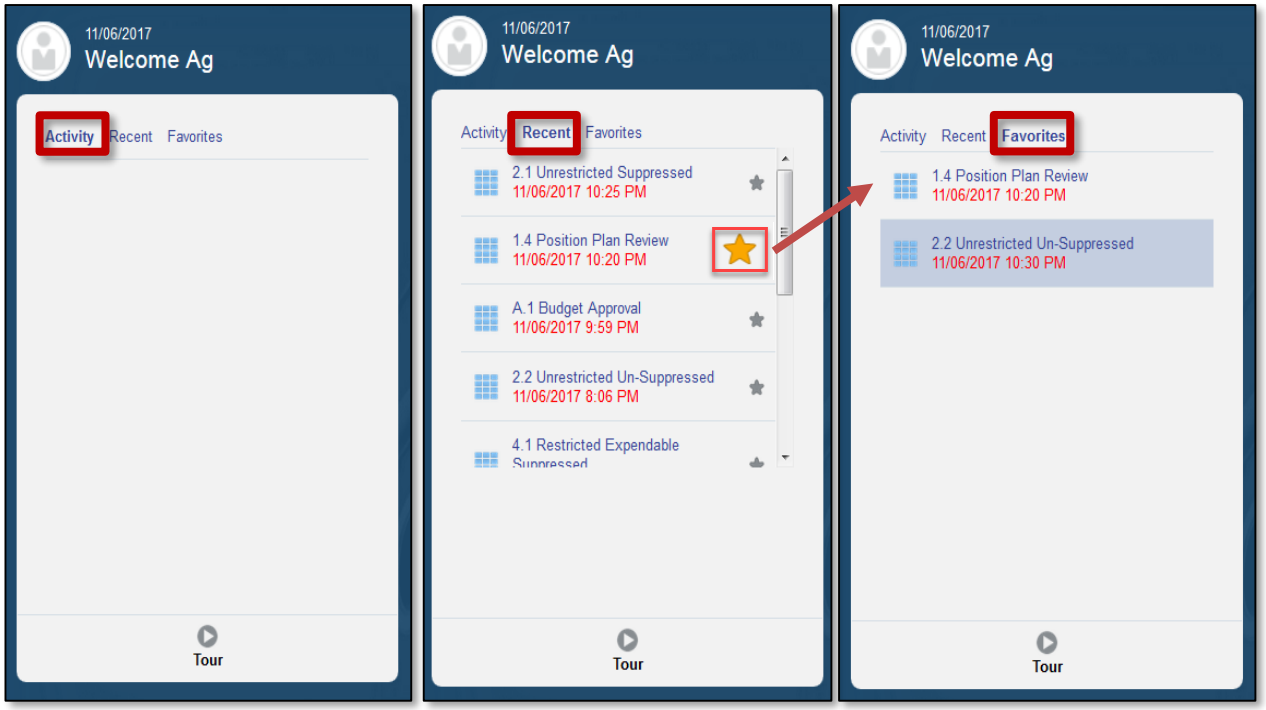
- While you have access to Navigator, it is recommend you use the navigation flows to carry out all budgeting tasks.



The PlanUW Homepage

The **Activity Pane** shows a list of recent activity and favorited objects.

Objects can be selected as favorites for easy access by clicking on the ★



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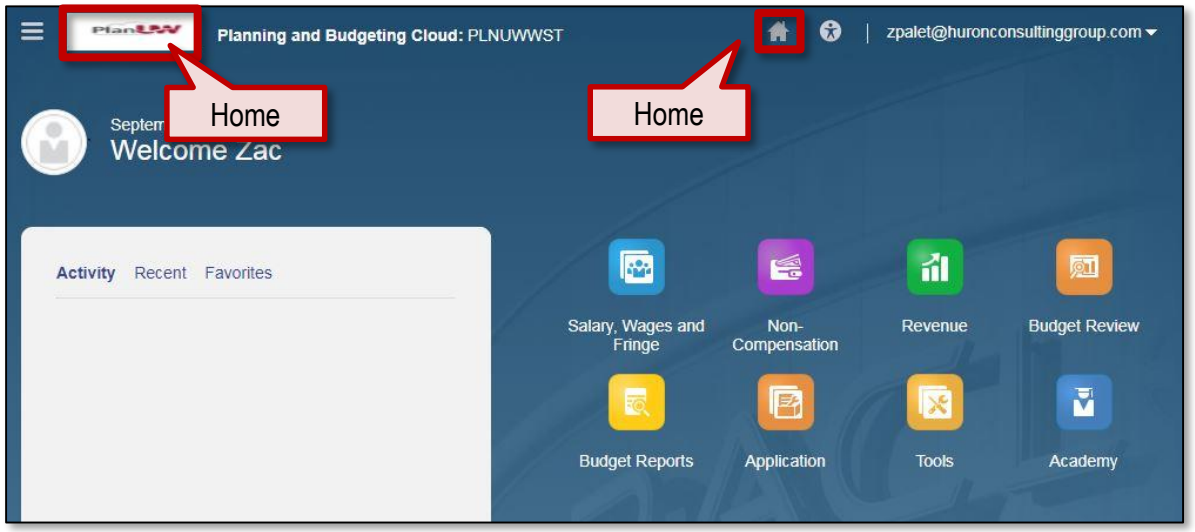
The PlanUW Homepage

You may return to the home page by:

- Clicking the PlanUW logo
- Clicking **Home**



You will use the Home / PlanUW logo often!

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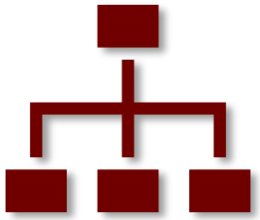
Setting User Variables



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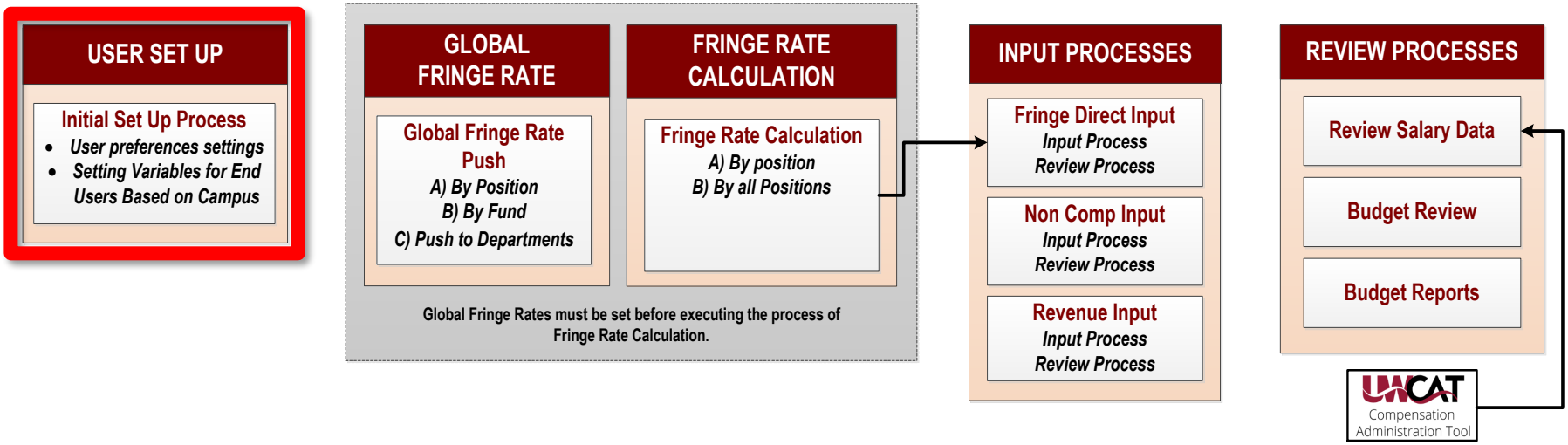
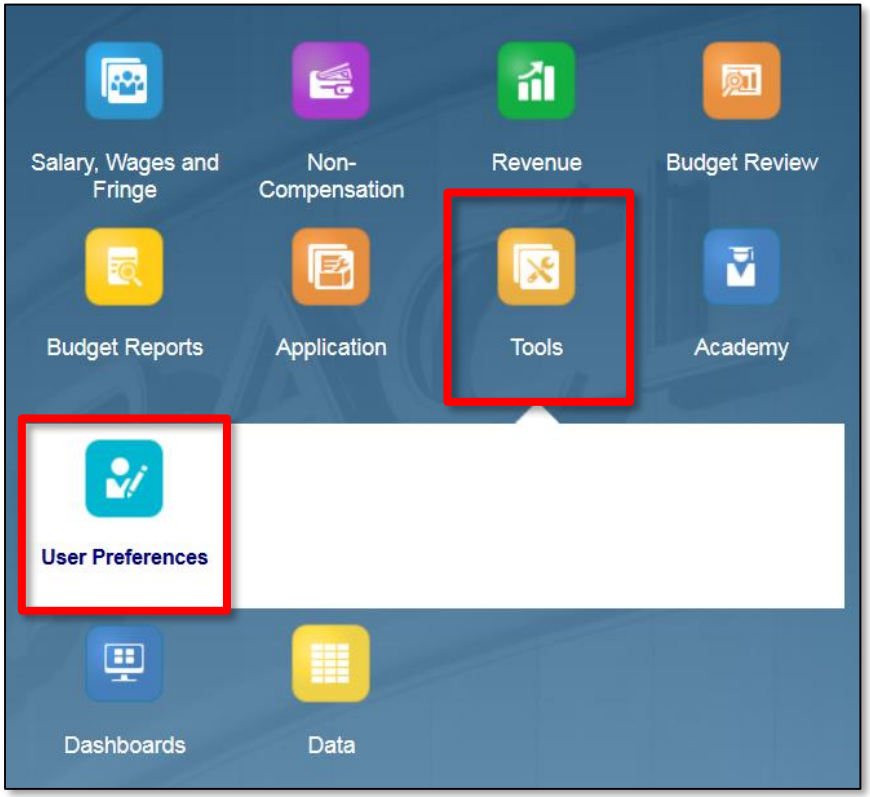
Setting User Variables in Annual Budgeting Process



Setting User Variables



End Users and **Power Users** have to set **User Variables** according to their institutions. Setting User Variables is a key step in ensuring that the user filters access to **campus exclusive** data.

To access Preferences:

1. Click the **Tools** cluster
2. Select the **User Preferences** card

NOTE: User variables only need to be set once, but they can be changed at any time. Since we are in "test" you will need to do this in production by following the same steps.

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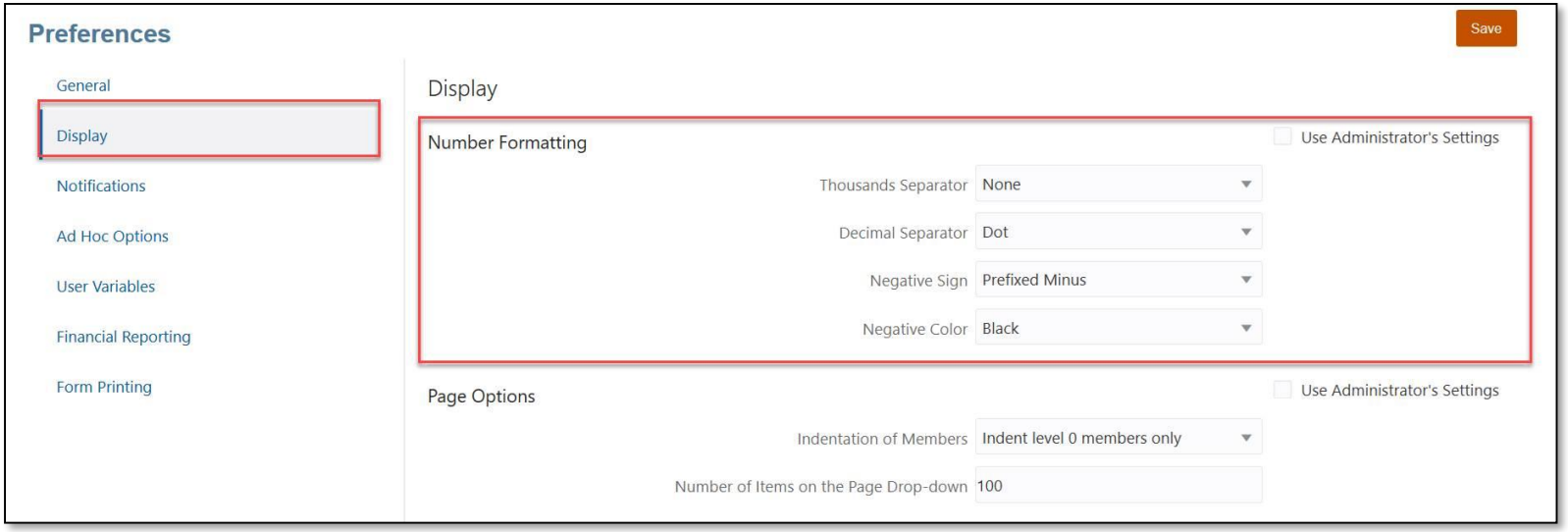
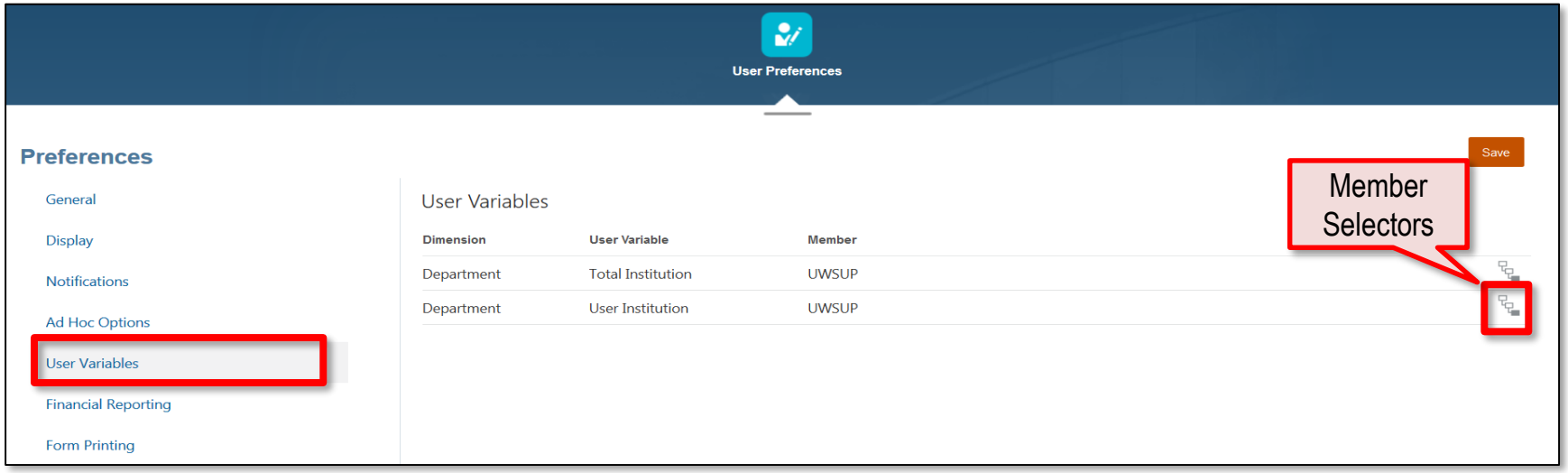
Setting User Variables – Display Setting

Under Display, End Users will be able to update their Number Formatting settings.



Setting User Variables – End Users



Members can be selected for each dimension by clicking **Member Selector**

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

Selecting Members

Members can be selected in two ways from the Member Selection window:

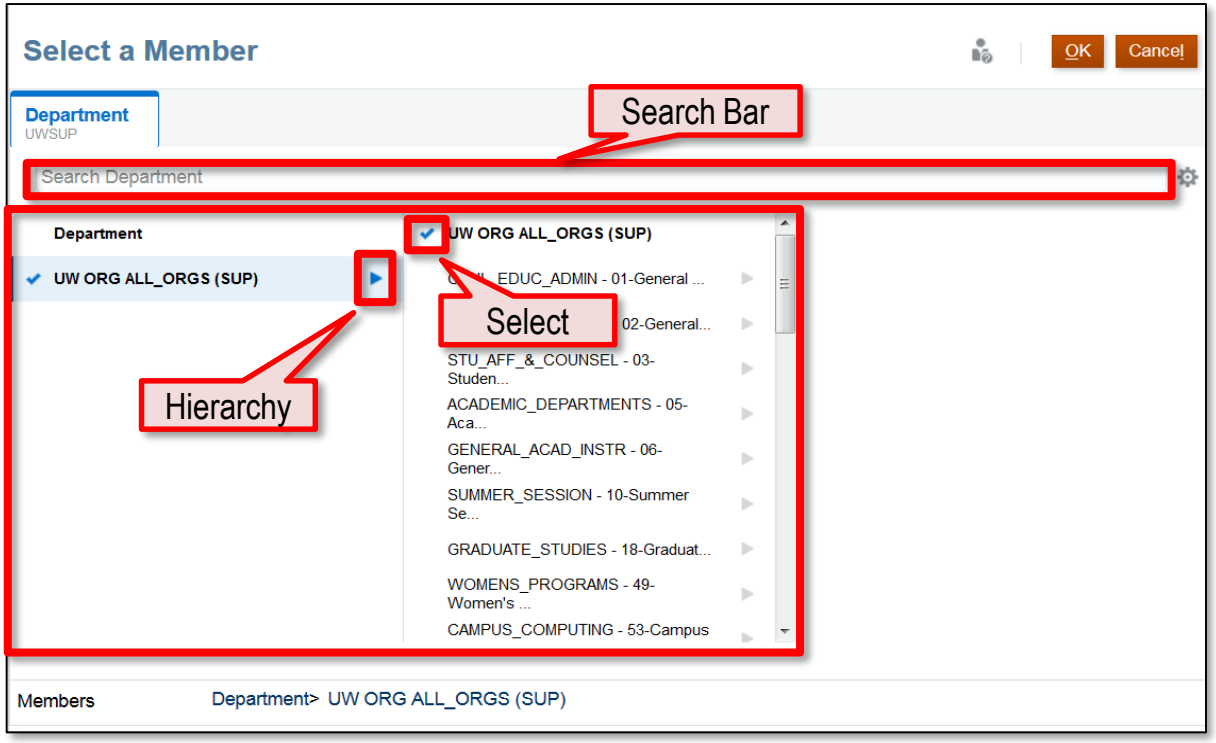
- **Search Bar**
- **Hierarchy**

When selecting members through a Hierarchy, drill into a member by clicking ▶

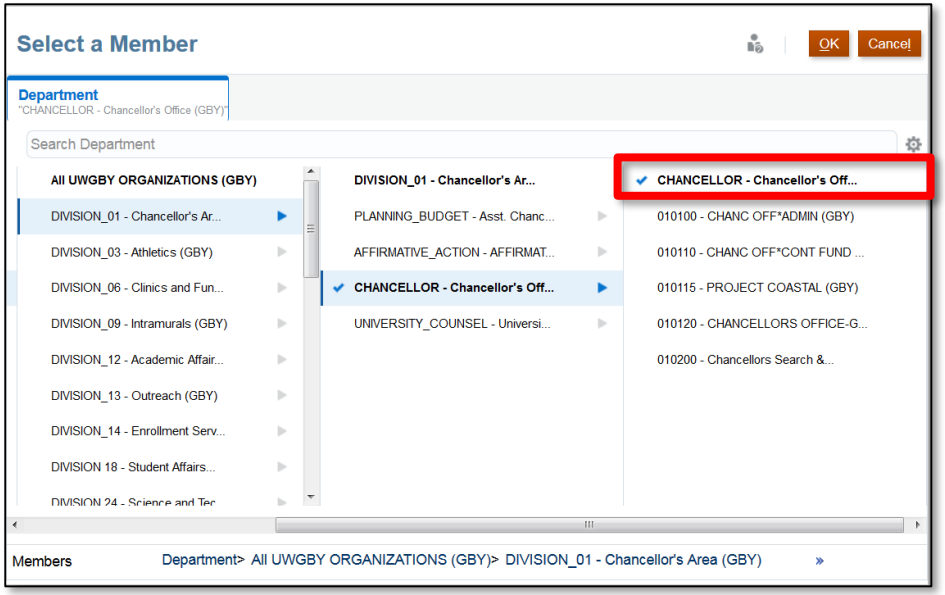
To select a member, click **Add**

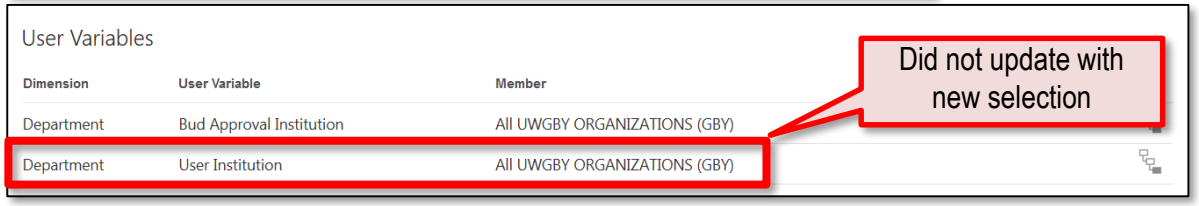
- Note that you are only able to select one member at a time

If the member selected does not appear on the User Variables selected, the next slide will explain the next steps.



Selecting Members - Before Continuing

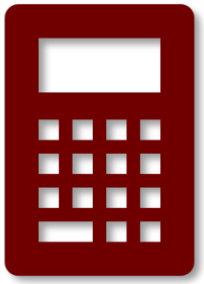




If you are not able to select a specific member, *in this example "CHANCELOR – Chancellor's Office"*, PlanUW lets you click the member, the blue check box confirms the selection, and then they can click OK. However, the selection does not actually get set as the "User Institution".

A work around for this is to **type the member name directly into the box.**

Budget Tasks in PlanUW



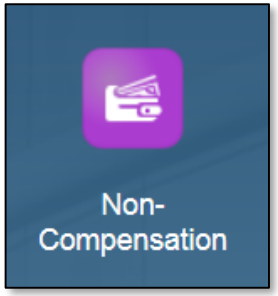
PlanUW Tasks and Processes

Moving forward, this presentation will cover on a step-by-step basis, the “how” to complete normal tasks in the PlanUW system. Each process will be accompanied with the Quick Reference Guide book.

The processes we will focus on are as follows:

- ✓ Input Non Comp Data *Entry*
- ✓ Reviewing Non Comp Data
- ✓ Input Revenue Data *Entry*
- ✓ Reviewing Revenue Data
- ✓ Reviewing Salary Data
- ✓ Calculating Fringe Using Rates Review
- ✓ Reviewing and Adjusting Fringe Data *Entry*
- ✓ Reviewing Planning Allocation Data
- ✓ Budget Review

Input Non Compensation Data



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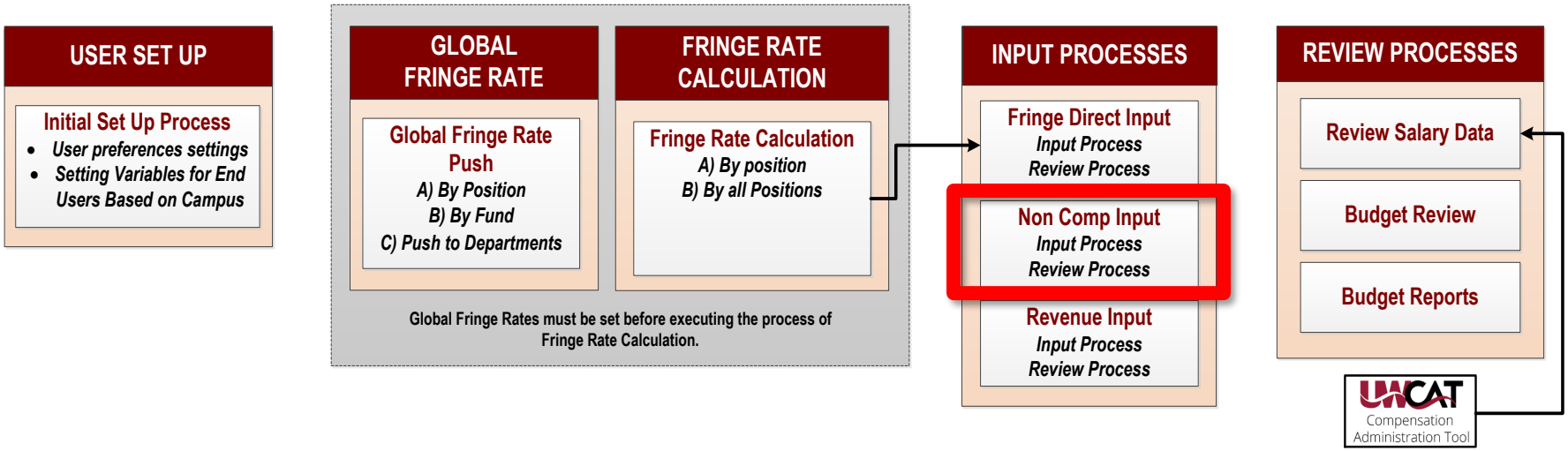
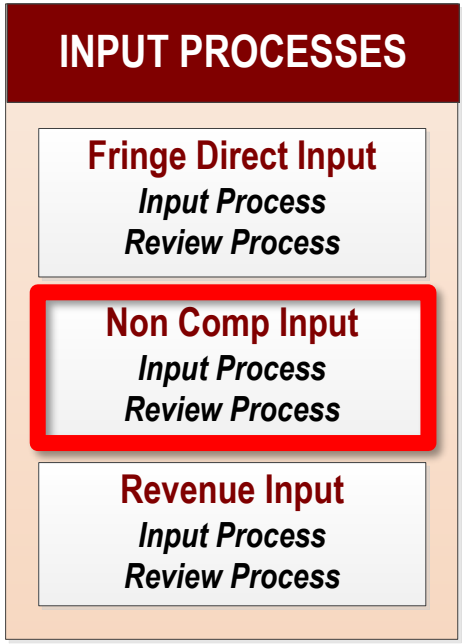
Non Comp Input Process in Annual Budgeting Process



Non Compensation Input Process

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

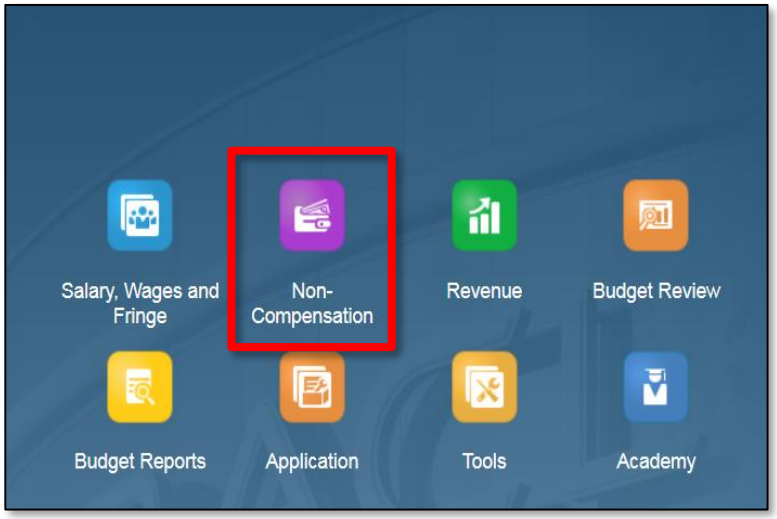
- This input process can take place at all three levels**, however we are only using Level 1 entry at UW-Madison for the FY20 budget process.**
- Input of budget data can take place in any of the following web forms:
  - By Department *
  - By Program
  - By Department & Program *
  - By Project
  - By Proj, Dept, and Prgm
- This presentation will cover the Non Compensation Input process at Level 1 and will focus on exercises in the (*) items above.
- To enter in a project budget you need to use either the “By Project” or the “By Proj, Dept, and Prgm” web forms.



Non Comp Input Process – [L1] – By Department

To begin the input process for Non Comp:

1. Click the **Non-Compensation** tile to open the spreadsheet.



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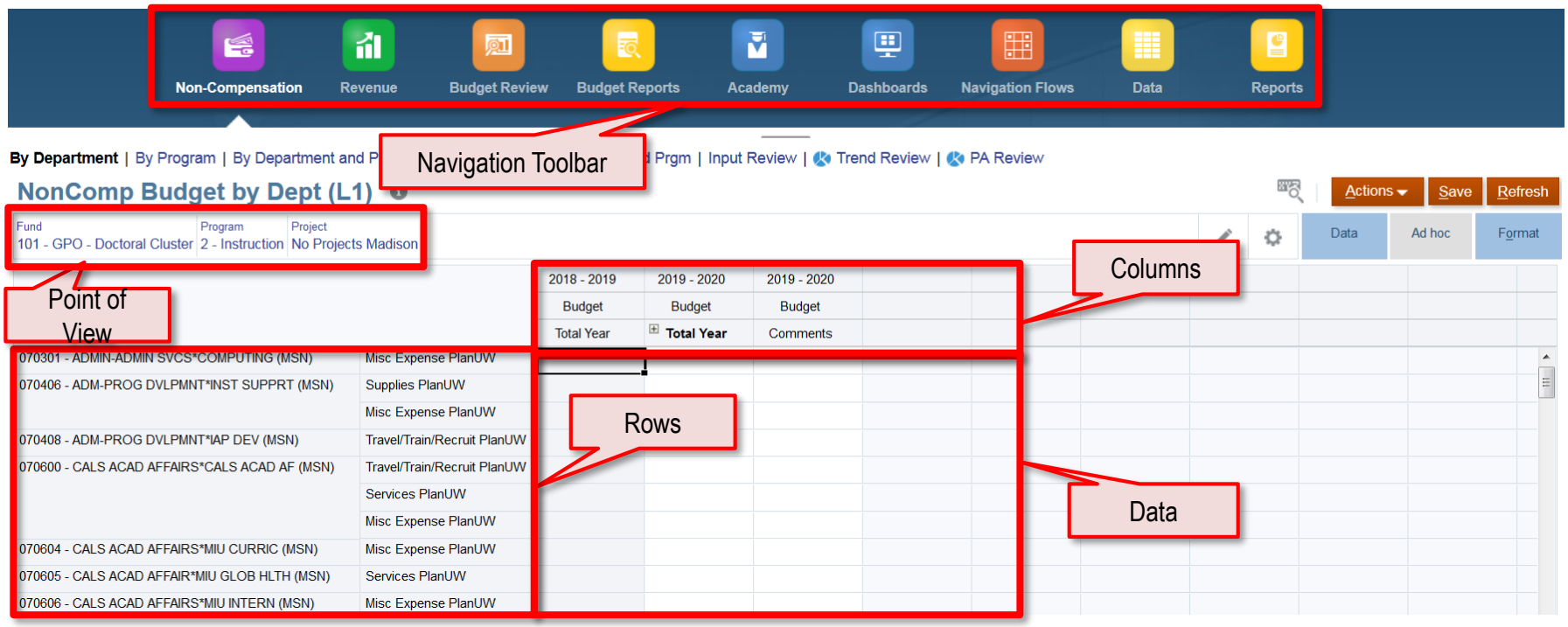
But First – Some Navigation Help

The next few slides will help you better understand how to navigate inside of the application. The area's we'll cover are:

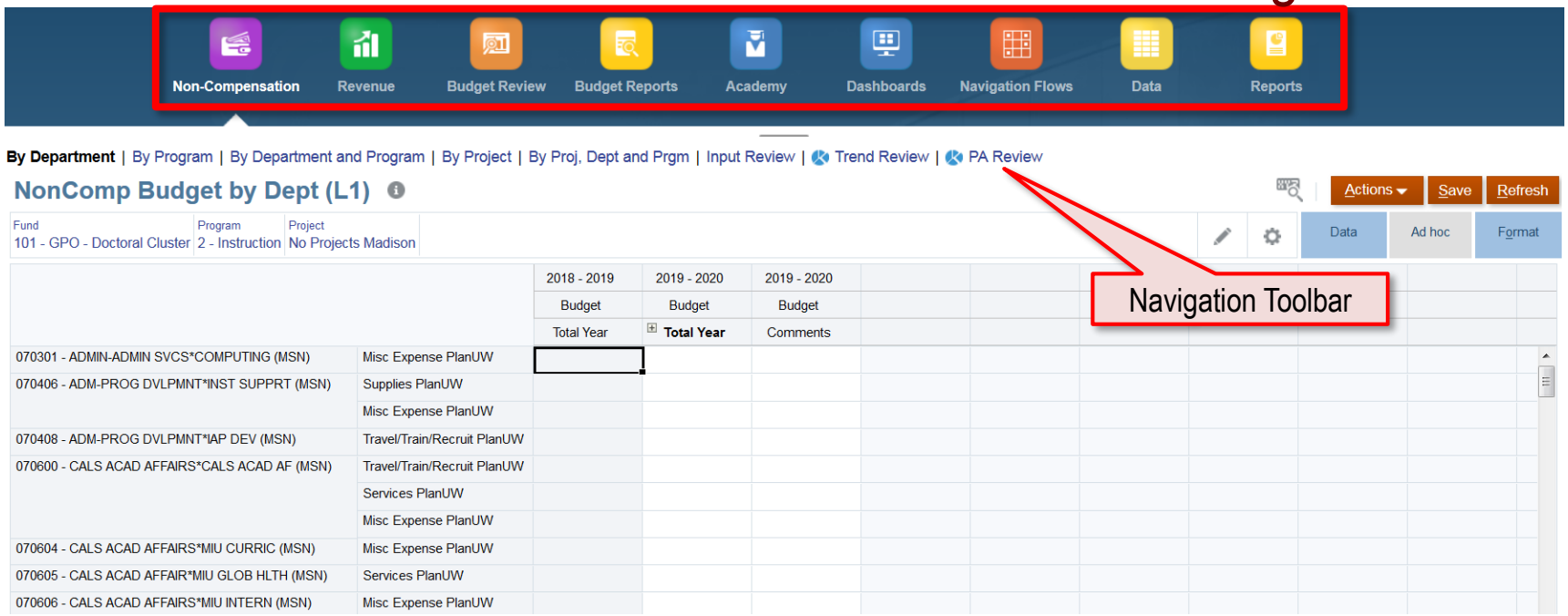
- Form Layout
- Navigation Toolbar
- Instructions
- Point of View
- Editing the Point of View – Using different methods
- Understanding that we need to be in Level1

Form Layout

Forms in PlanUW have a similar structure: Navigation Toolbar, Rows, Columns, Point of View (POV), Data Entry Area

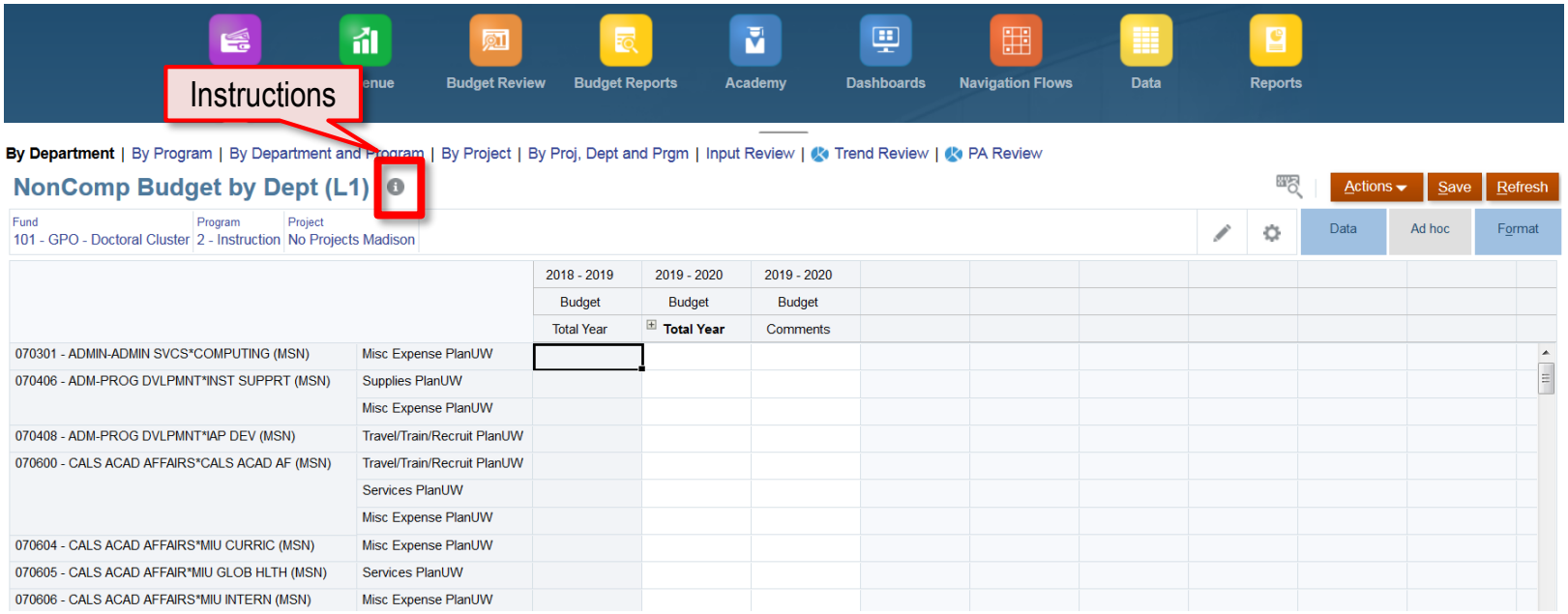


Navigation Toolbar



When a form is opened, the navigation toolbar is displayed above the form. The **navigation toolbar** allows you to navigate to the other cards in that cluster.

Instructions



If the form has additional information, Click **Instructions** information and instructions on the form. Note – we are not initially using this feature but can do so if there is value for end users.

Point of View

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

By Department | By Program | By Department and Program | By Project | By ... end Review | PA Review

Point of View

NonComp Budget by Dept (L1)

Actions | Save | Refresh

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

Data | Ad hoc | Format

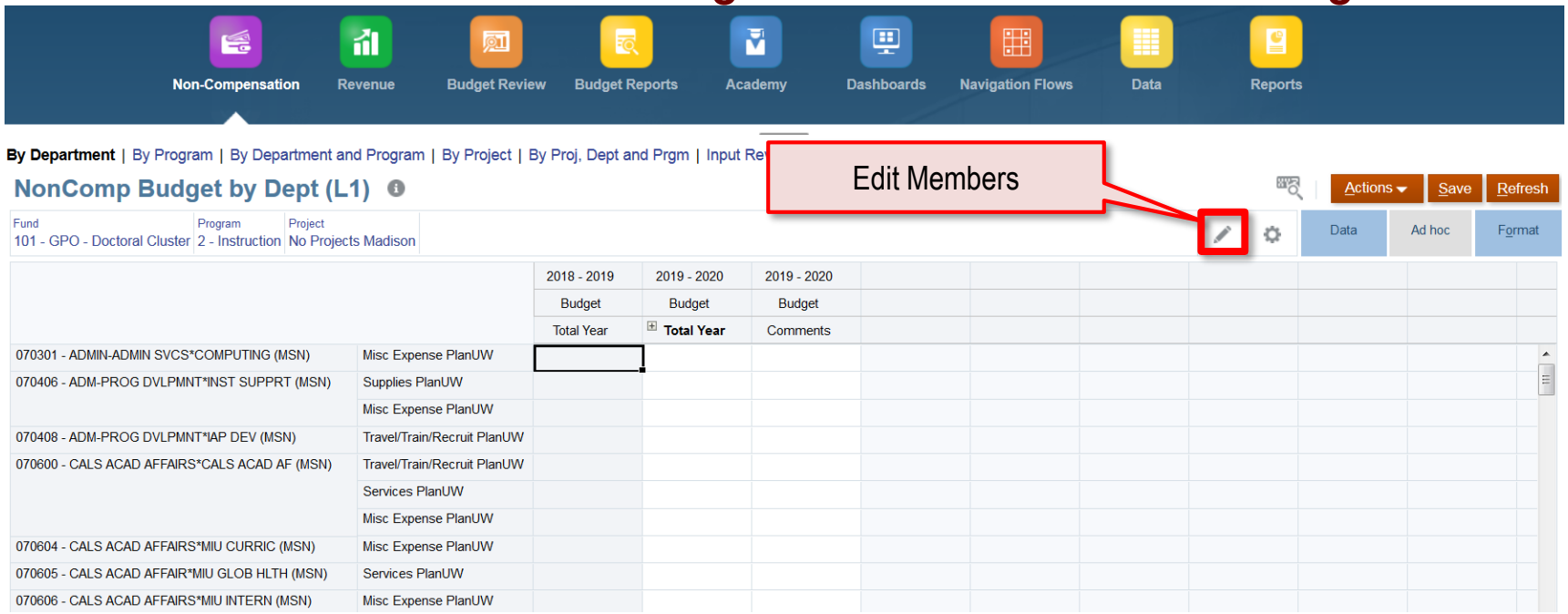
		2018 - 2019	2019 - 2020	2019 - 2020
		Budget	Budget	Budget
		Total Year	Total Year	Comments
070301 - ADMIN-ADMIN SVCS*COMPUTING (MSN)	Misc Expense PlanUW			
070406 - ADM-PROG DVLPMNT*INST SUPPRT (MSN)	Supplies PlanUW			
	Misc Expense PlanUW			
070408 - ADM-PROG DVLPMNT*IAP DEV (MSN)	Travel/Train/Recruit PlanUW			
070600 - CALS ACAD AFFAIRS*CALS ACAD AF (MSN)	Travel/Train/Recruit PlanUW			
	Services PlanUW			
	Misc Expense PlanUW			
070604 - CALS ACAD AFFAIRS*MIU CURRIC (MSN)	Misc Expense PlanUW			
070605 - CALS ACAD AFFAIR*MIU GLOB HLTH (MSN)	Services PlanUW			
070606 - CALS ACAD AFFAIRS*MIU INTERN (MSN)	Misc Expense PlanUW			

The **Point of View (POV)** defines the section of data in the PlanUW database you are viewing. You select the desired members for each dimension to determine the context for the pages, rows, and columns.

- There are **two ways** of changing the POV: **By clicking on the Pencil**, or **by clicking directly in the POV link**.

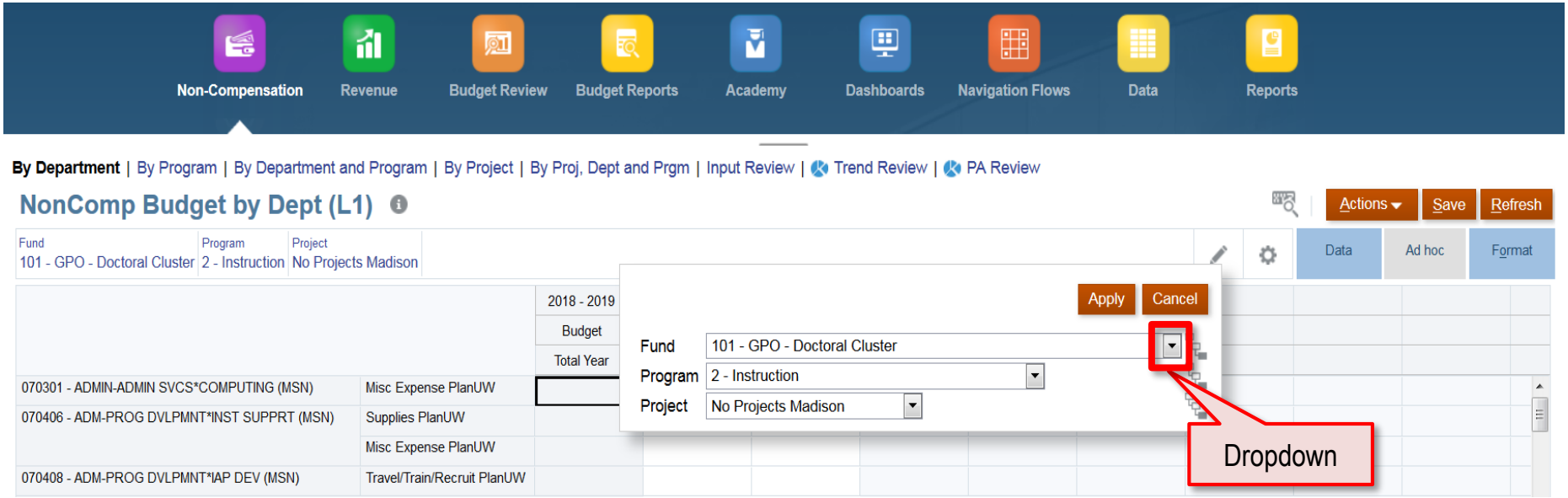
The default Organization in the POV is defined by the user variables you set.

Editing the Point of View – Using the Pencil



One way to edit the POV, is by clicking on the click Pencil **(Edit Members)**

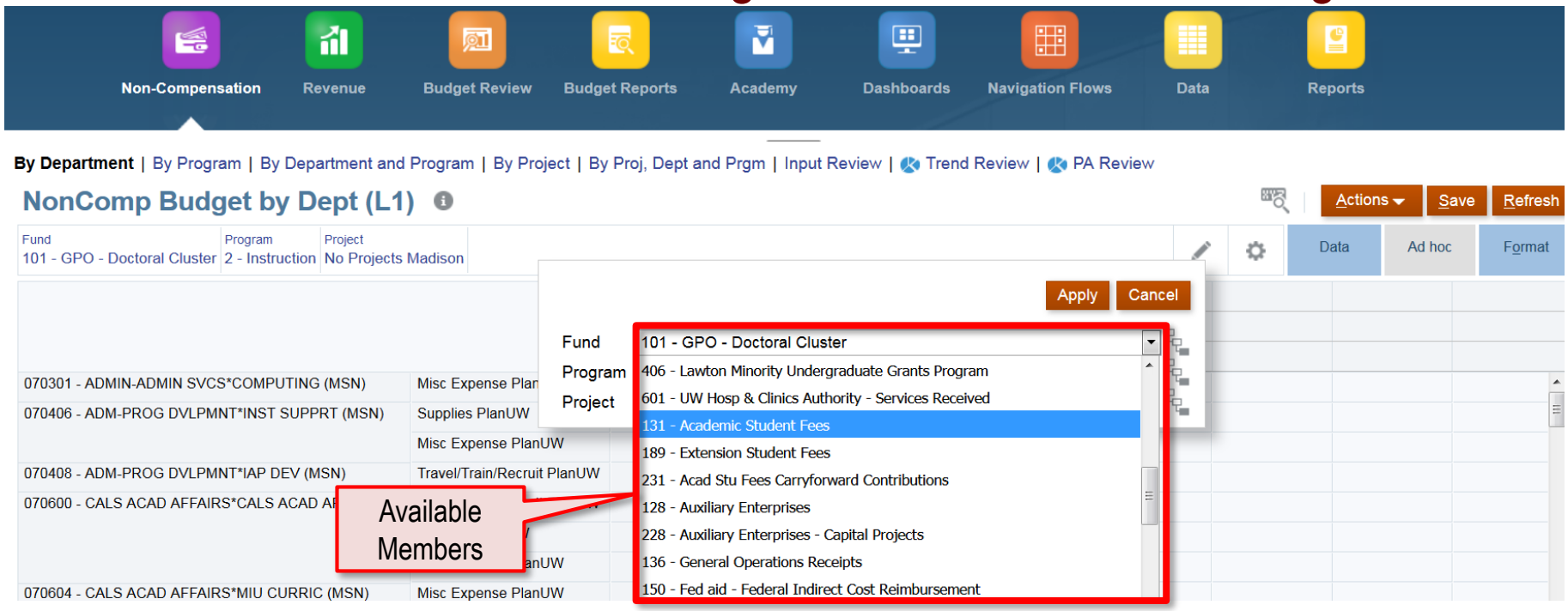
Editing the Point of View – Using the Pencil



The Edit Members window is displayed.

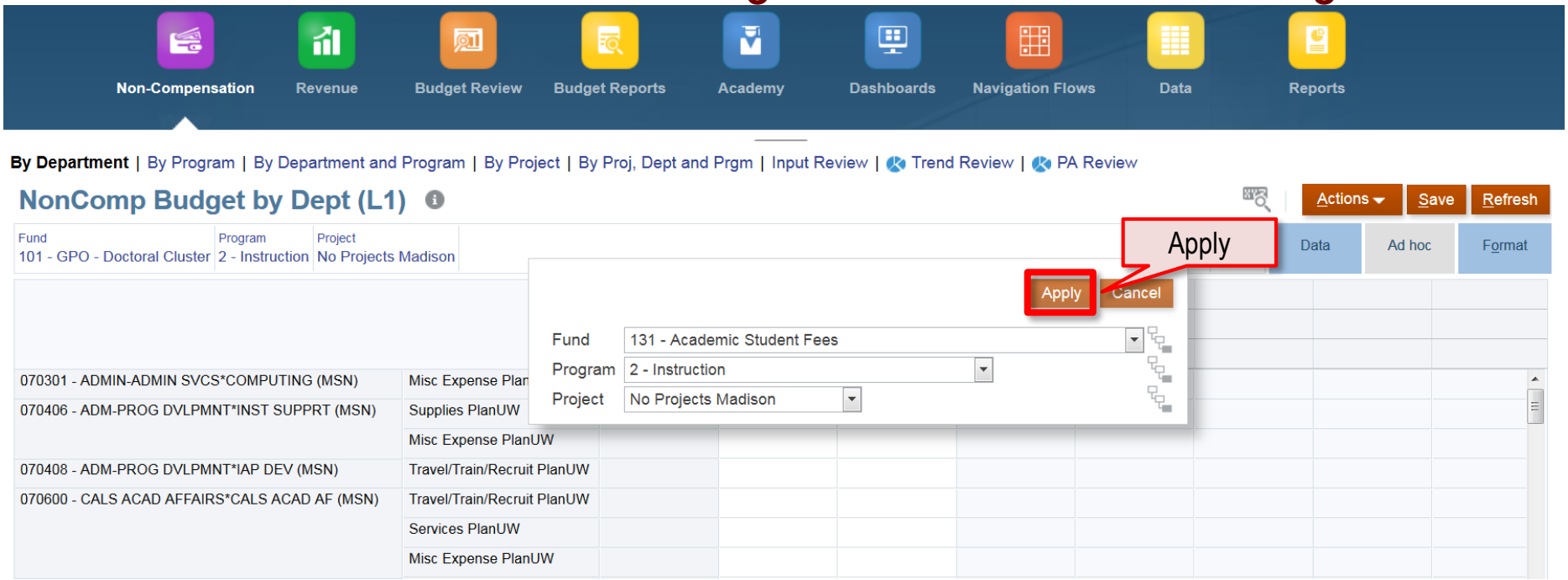
To select different members for the dimension, click the **dropdown** next to each dimension.

Editing the Point of View – Using the Pencil



Select the desired member from the list of available members. Note – not all members (in this case fund) are displayed in the above screen shot due to space however you can access all funds in the application.

Editing the Point of View – Using the Pencil



Once the desired member is selected, click **Apply.**

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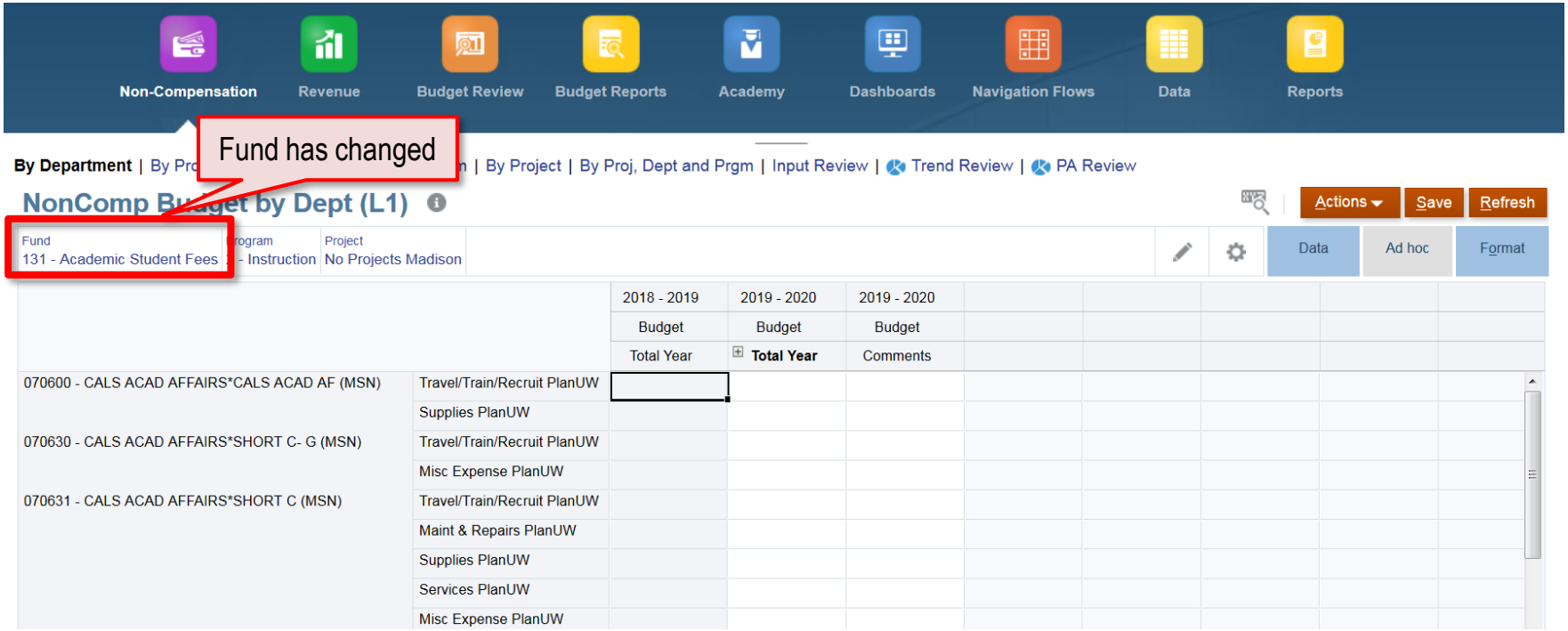
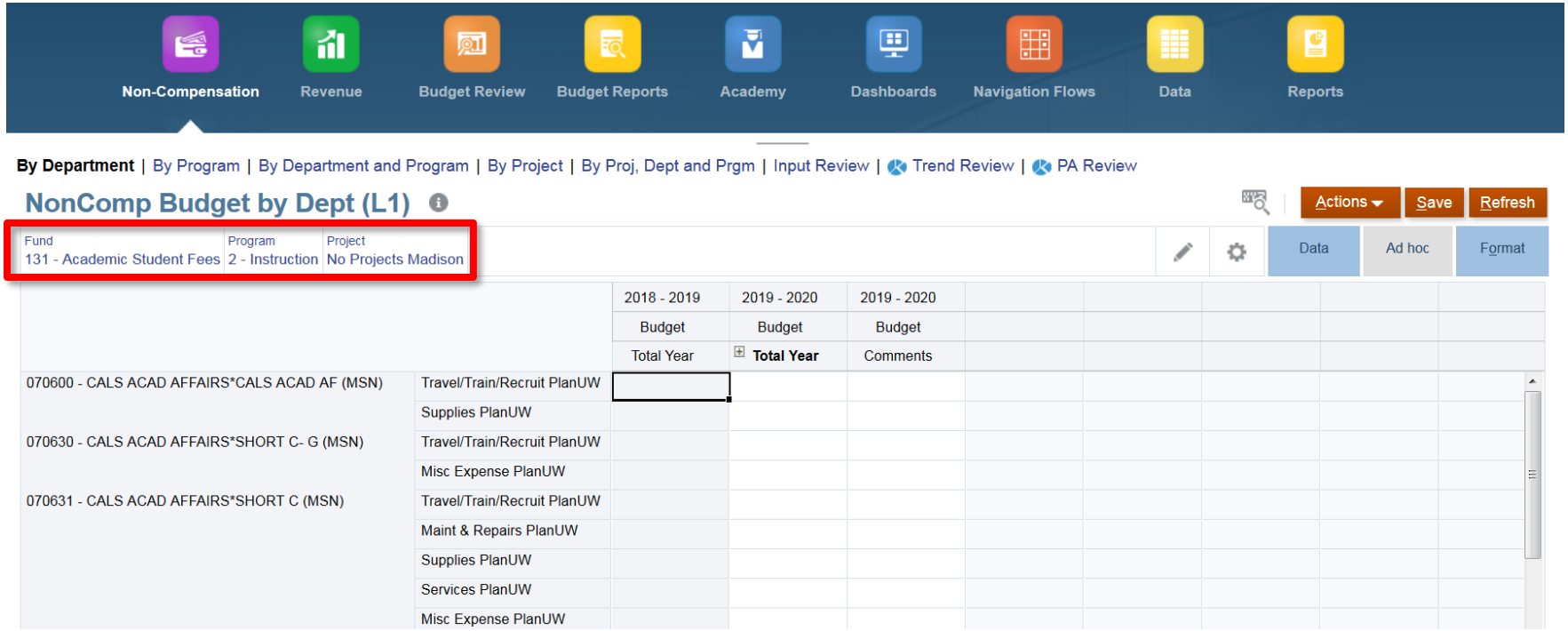
Editing the Point of View – Using the Pencil



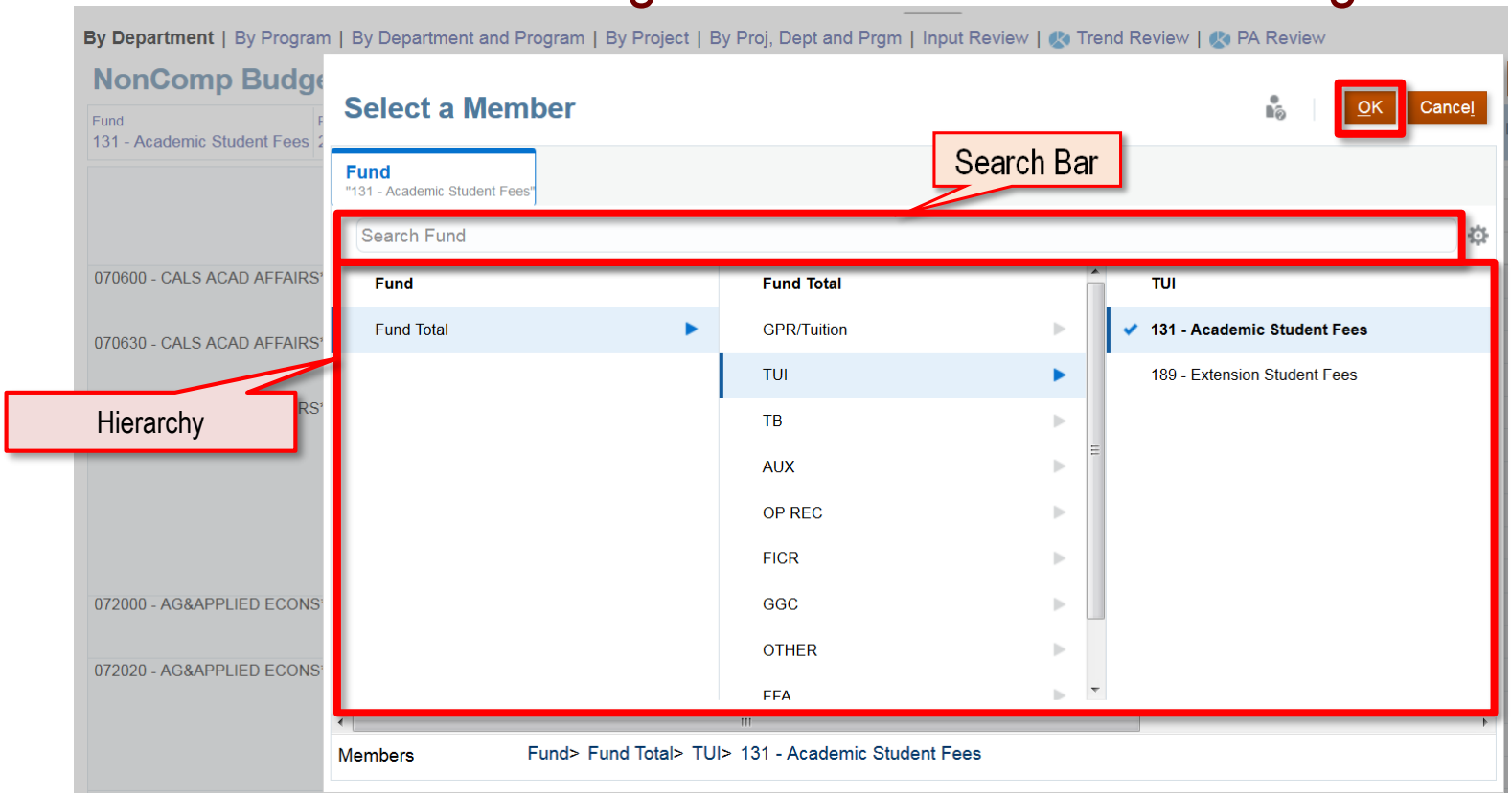
Once you click on Apply, you will see the change occur in the Point of View. In this case Fund has been adjusted to 131.

Editing the Point of View – Clicking the POV



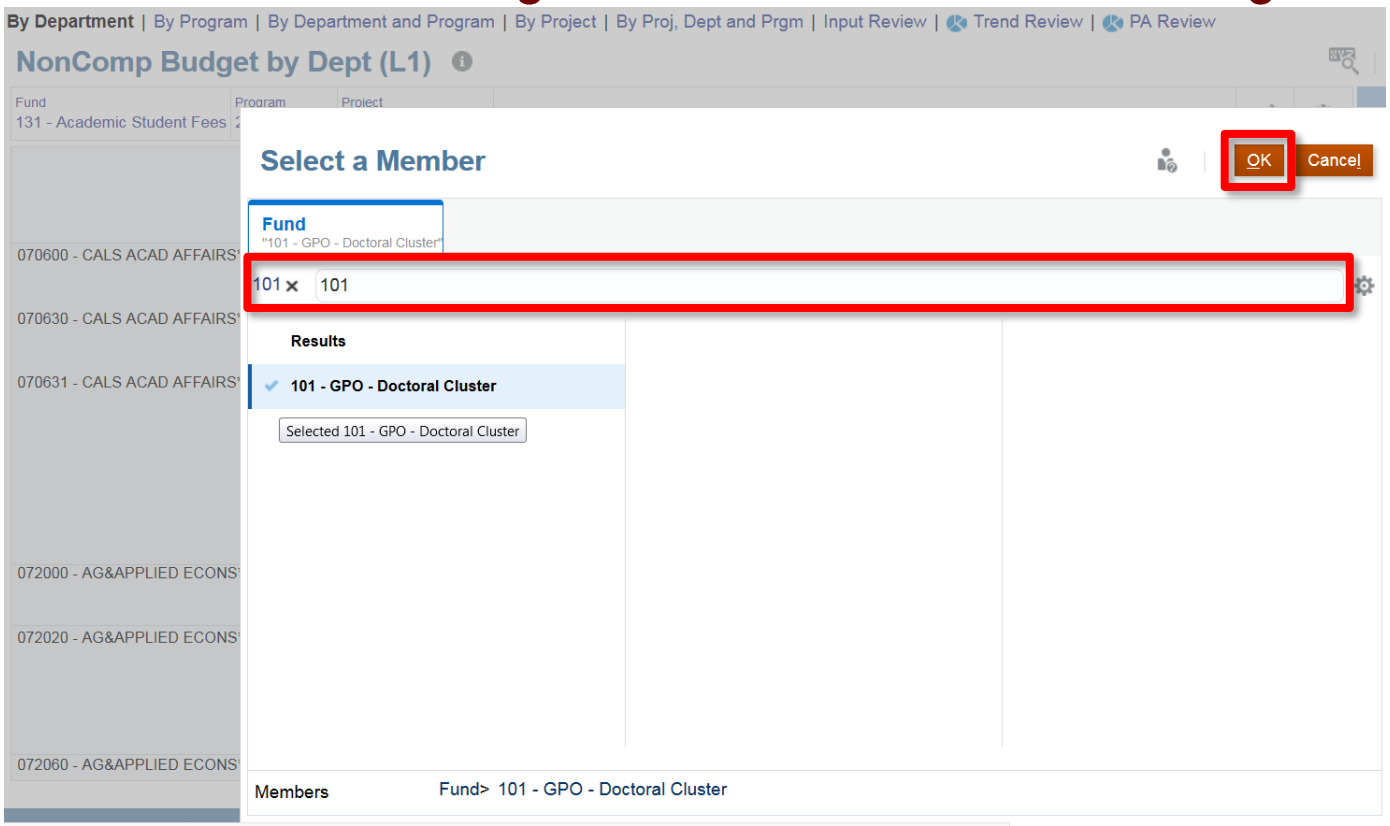
To edit using the POV, click on one of the members in the POV. In the above example Fund, Program or Project are selectable. For this example we'll use Fund.

Editing the Point of View – Clicking the POV



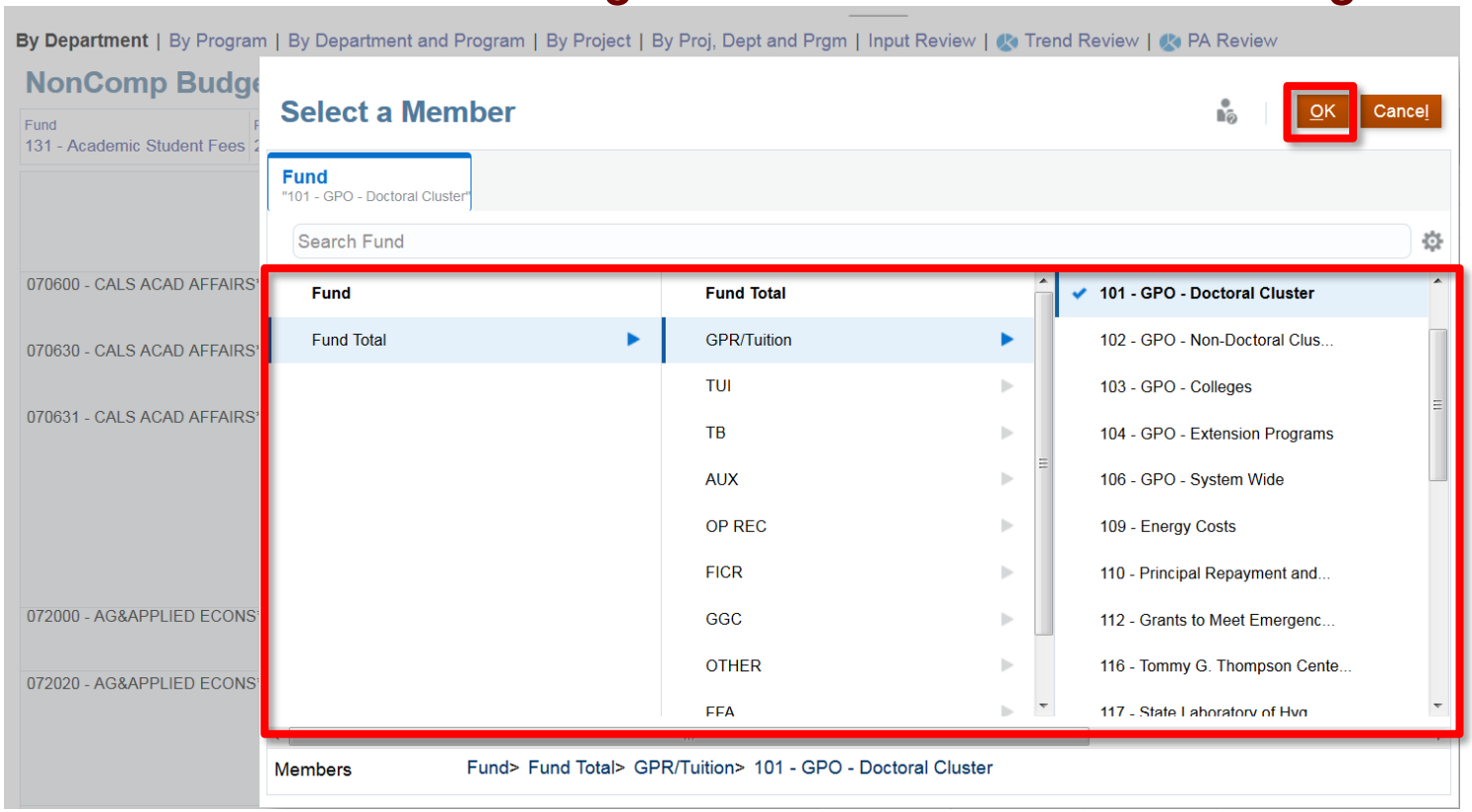
You can use the **Search Bar** or **Hierarchy** to find you desired member.

Editing the Point of View – Clicking the POV



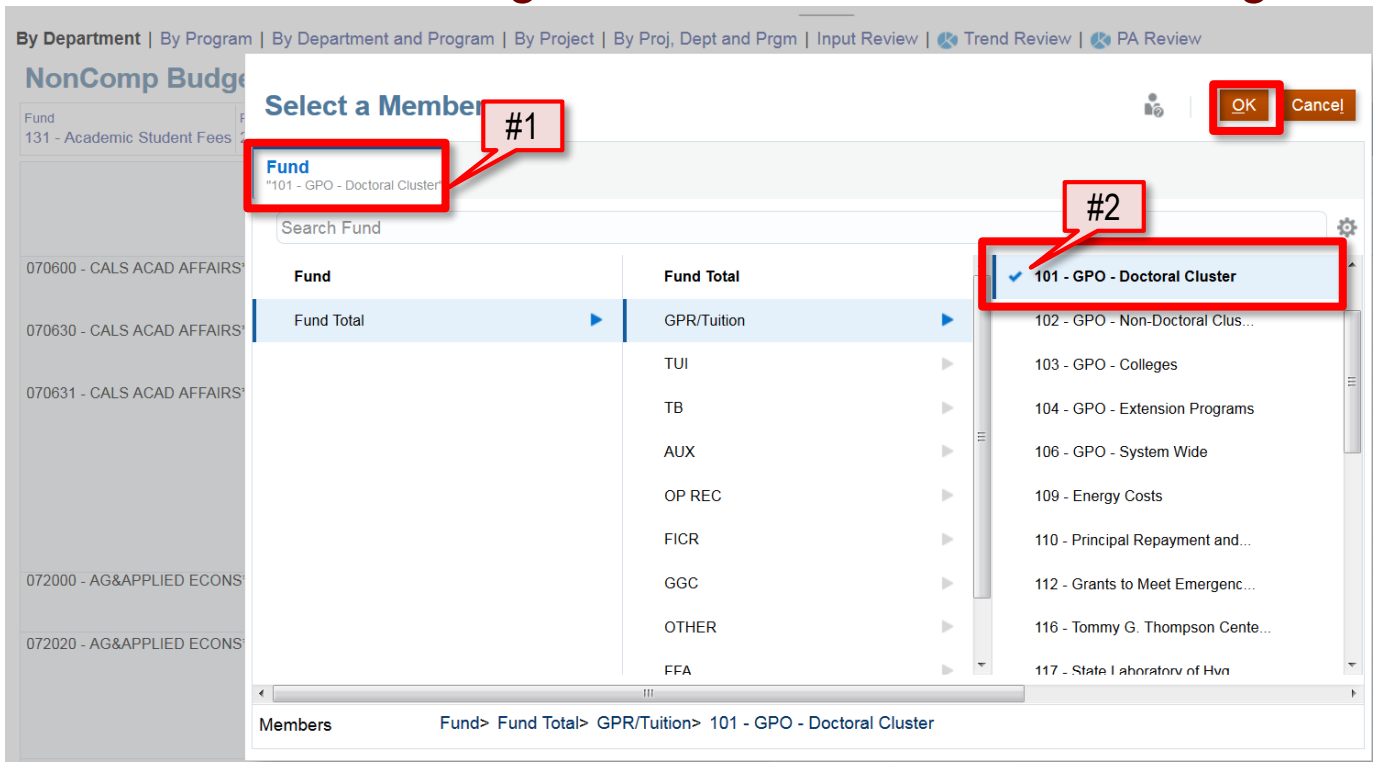
Example of using **Search Bar** to select Fund 101, then click “OK” to execute.

Editing the Point of View – Clicking the POV



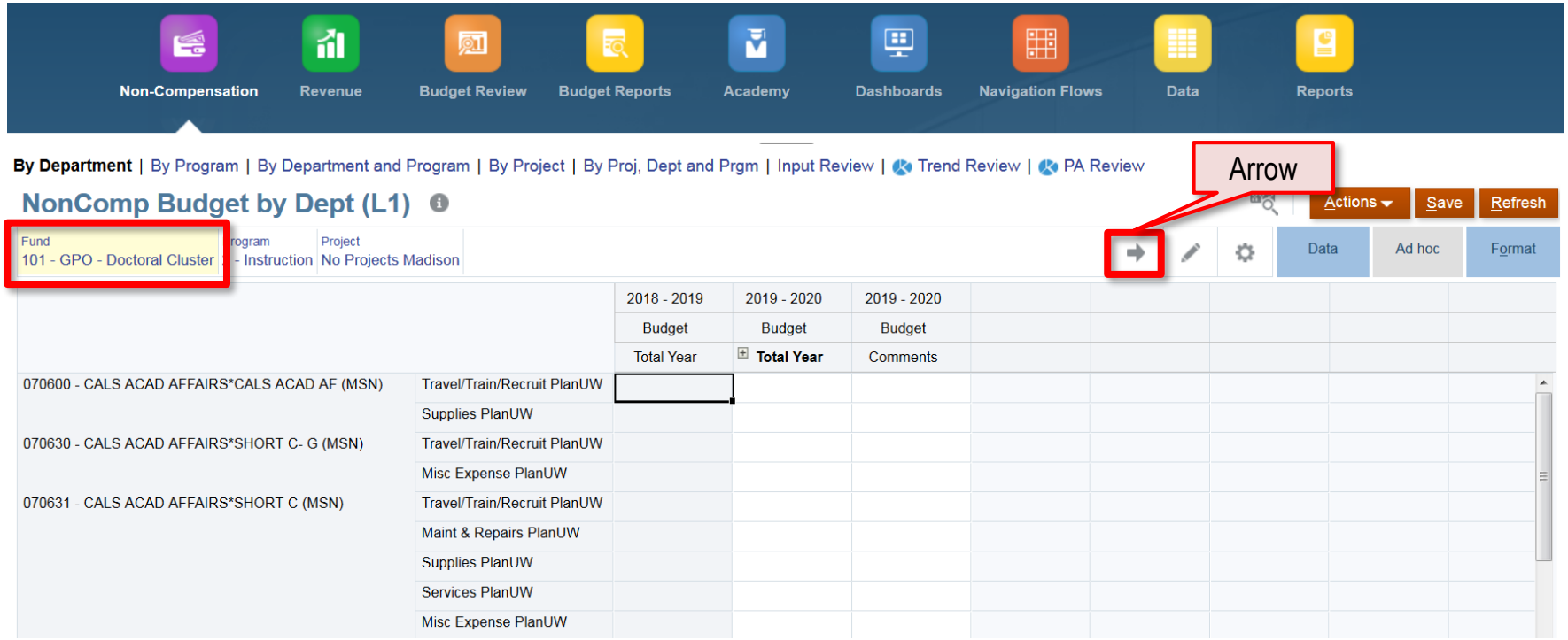
Example of using **Hierarchy** to select Fund 101, then click “OK” to execute.

Editing the Point of View – Clicking the POV



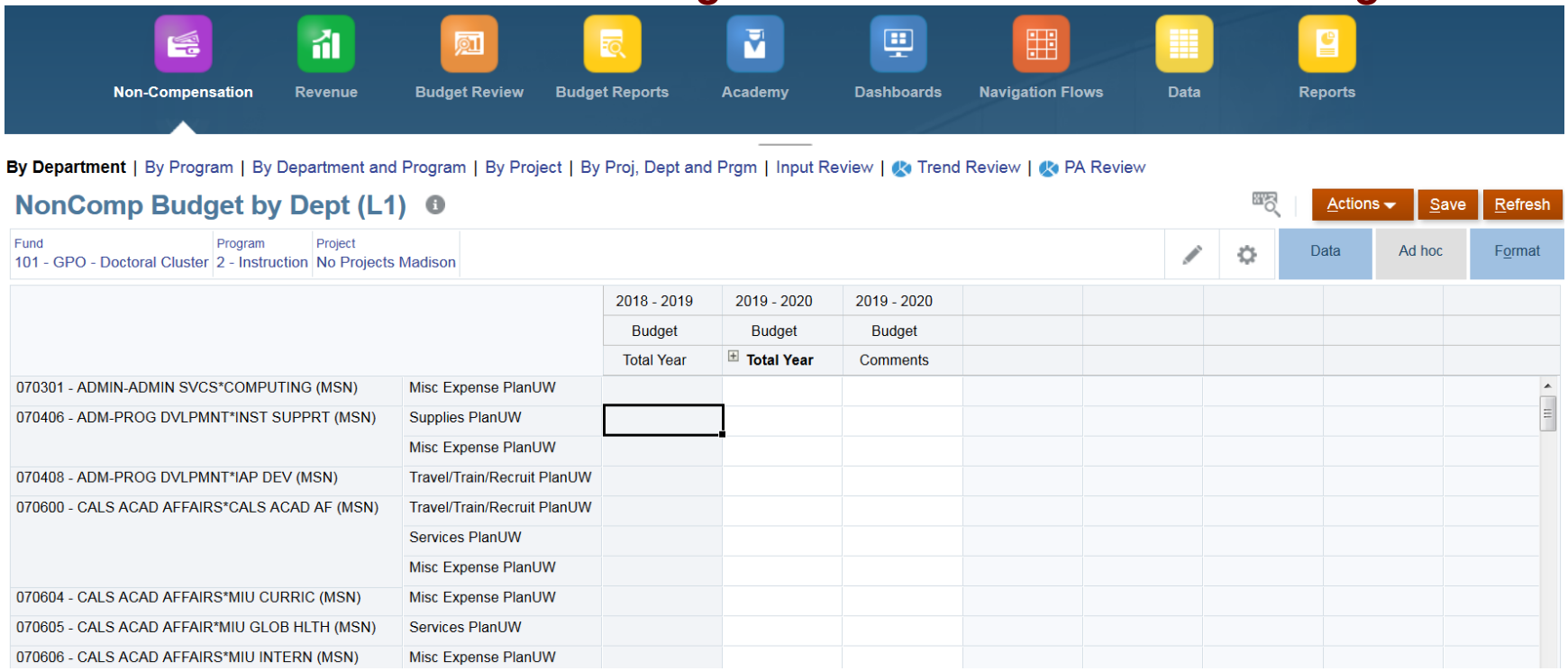
Regardless of method note the following two items to confirm you're selection is set (#1) Choice shows up under Fund and (#2) Check mark by the fund you selected

Editing the Point of View – Clicking the POV



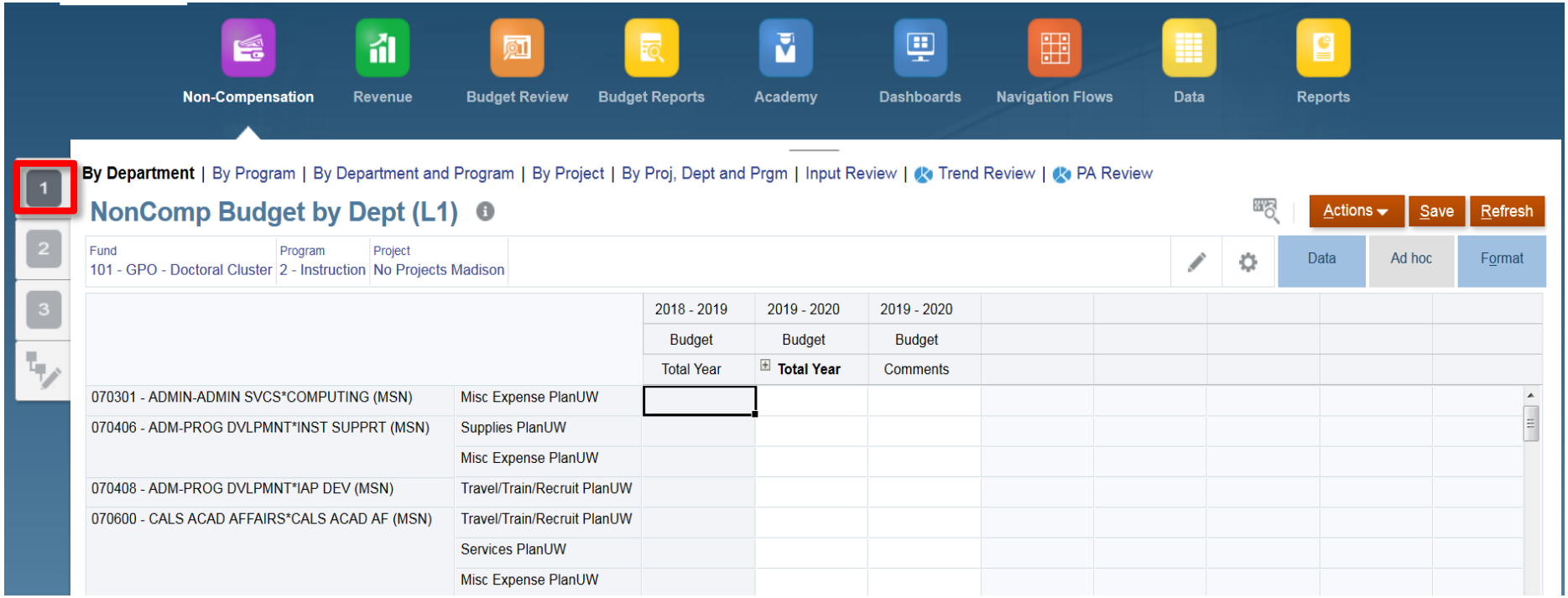
The updated POV should reflect highlighted in yellow. If correct, click on the right arrow to execute the POV change.

Editing the Point of View – Clicking the POV



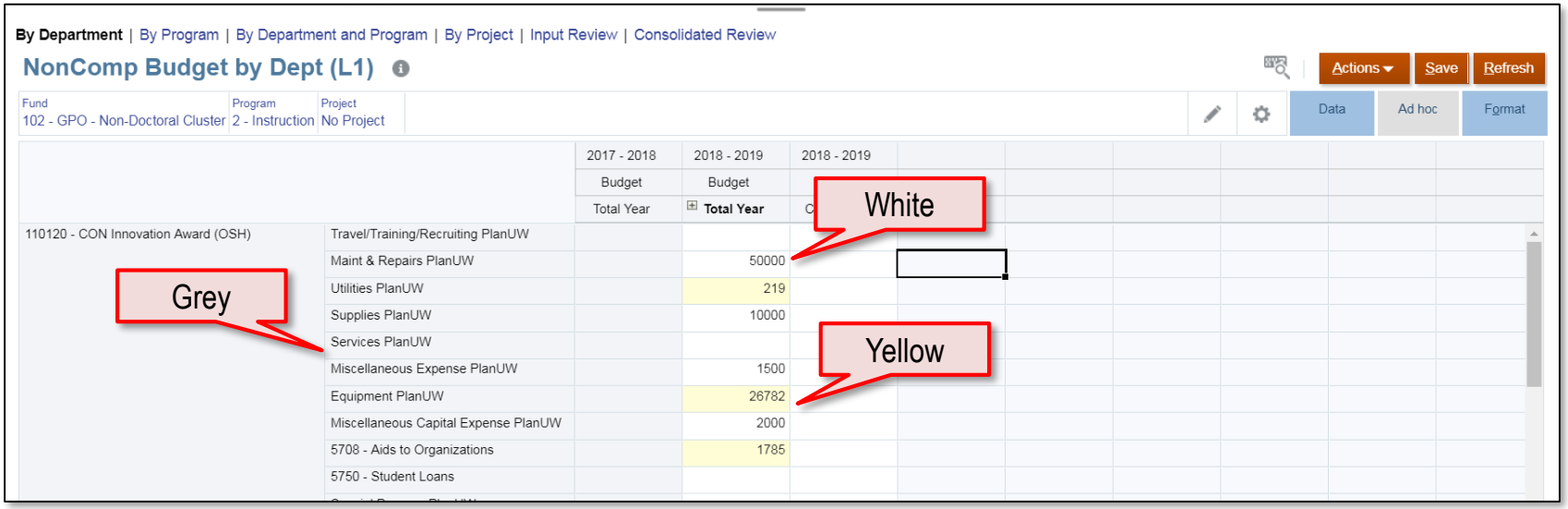
After clicking the arrow, you should see the proper selection showing on the web form.

Level Entry – We Are Using Level 1



Reminder – we are using Level 1 for our Non-Compensation and Revenue entry in PlanUW. You want to make sure that you are in Level 1 while you are entering data.

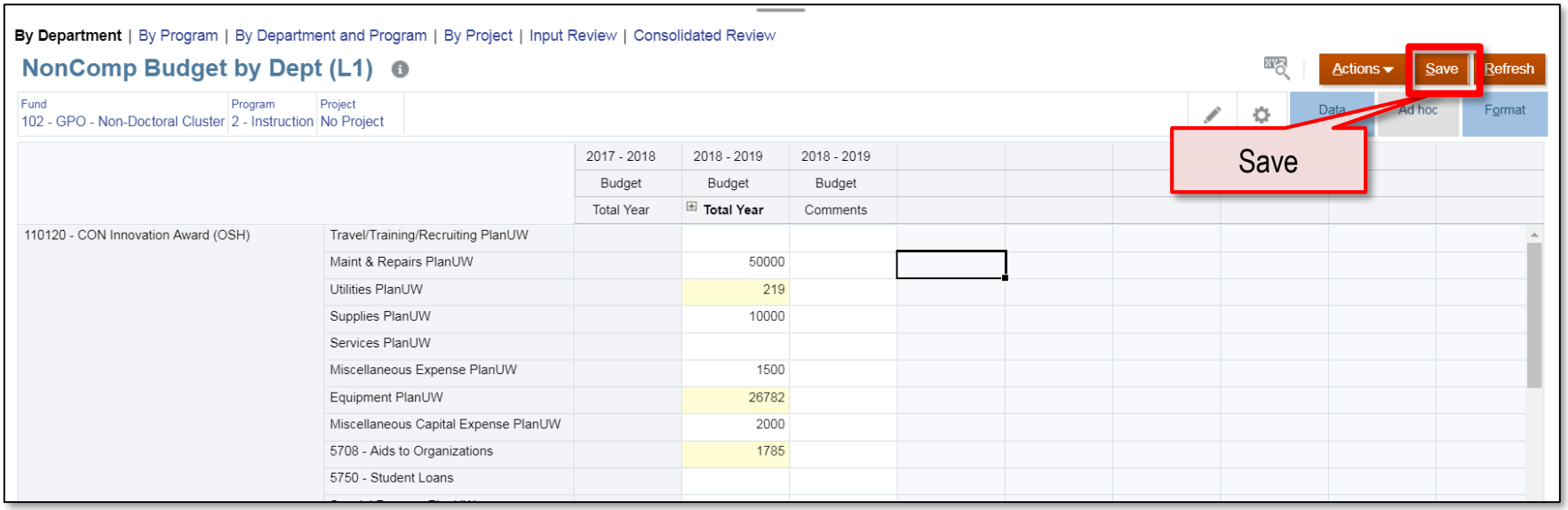
Entering Data



Cell colors indicate the cell's status:

- **White**: default; data can be entered in these cells
- **Yellow**: "dirty" cells, whose values changed but are not yet saved
- **Grey**: read-only cells

Saving Forms



To save a form, click **Save.**

NOTE: You will not receive any error or message if you leave the form without saving your data. Any data entered without saving will be lost.

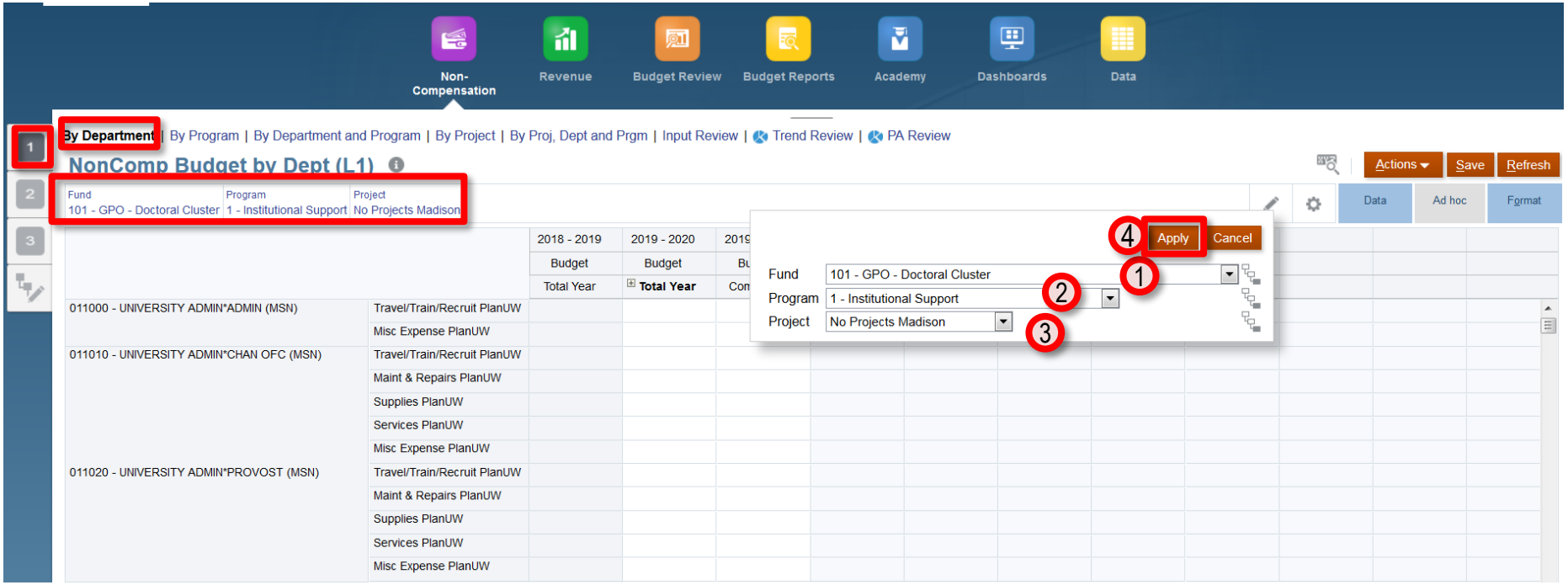
Saving Forms

An information box will display indicating that the data has been successfully saved and that the data has been “pushed” to the database.

If a business rule is ran, a notification will also be displayed in this information window.

And now its time to enter data!

Non Comp Input Process – [L1] – By Department



By default, the form will open on Level 1 and By Department. To edit, click on either the POV or the Pencil button (shown above):

1. Select the **Fund**
2. **Program**
3. **Project** with prior year data.
4. Click on **Apply** once done.

*Note – if you have multiple people attending training please choose different funds/program/project combination if possible

Non Comp Input Process – [L1] – By Department

Non-Compensation | Revenue | Budget Review | Budget Reports | Academy | Dashboards | 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 Dept (L1)

Actions | Save | Refresh

Fund: 101 - GPO - Doctoral Cluster | Program: 1 - Institutional Support | Project: No Projects Madison

Data | Ad hoc | Format

		2018 - 2019 Budget Total Year	2019 - 2020 Budget Total Year	2019 - 2020 Budget Comments
011000 - UNIVERSITY ADMIN*ADMIN (MSN)	Travel/Train/Recruit PlanUW			
	Misc Expense PlanUW			
011010 - UNIVERSITY ADMIN*CHAN OFC (MSN)	Travel/Train/Recruit PlanUW			
	Maint & Repairs PlanUW			
	Supplies PlanUW			
	Services PlanUW			
	Misc Expense PlanUW			
011020 - UNIVERSITY ADMIN*PROVOST (MSN)	Travel/Train/Recruit PlanUW		10,000	
	Maint & Repairs PlanUW			
	Supplies PlanUW			
	Services PlanUW			
	Misc Expense PlanUW			

1. Ensure that the correct budget accounts are displayed.
2. Confirm that the current year (2018 - 2019) is **read-only** (Grey)
3. The **next fiscal year budget and comment columns** should be available for input. Enter in a simple dollar amount into one of the available intersections (note – please choose a different intersection than your colleagues attending training). Enter data, and click **Enter** once done. This should turn the cells **yellow**.
4. Click **Save** once done.

Quick Check

Did you see this and this?

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

Successful Save

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

NonComp Budget by Dept (L1)

Fund	Program	Project
101 - GPO - Doctoral Cluster	1 - Institutional Support	No Projects Madison

		2018 - 2019	2019 - 2020	2019 - 2020
		Budget	Budget	Budget
		Total Year	**Total Year**	Comments
011000 - UNIVERSITY ADMIN*ADMIN (MSN)	Travel/Train/Recruit PlanUW			
	Misc Expense PlanUW			
011010 - UNIVERSITY ADMIN*CHAN OFC (MSN)	Travel/Train/Recruit PlanUW			
	Maint & Repairs PlanUW			
	Supplies PlanUW			
	Services PlanUW			
	Misc Expense PlanUW			
011020 - UNIVERSITY ADMIN*PROVOST (MSN)	Travel/Train/Recruit PlanUW		10,000	
	Maint & Repairs PlanUW			
	Supplies PlanUW			
	Services PlanUW			
	Misc Expense PlanUW			

Input cell turned from yellow to white

Reviewing Non Compensation Data

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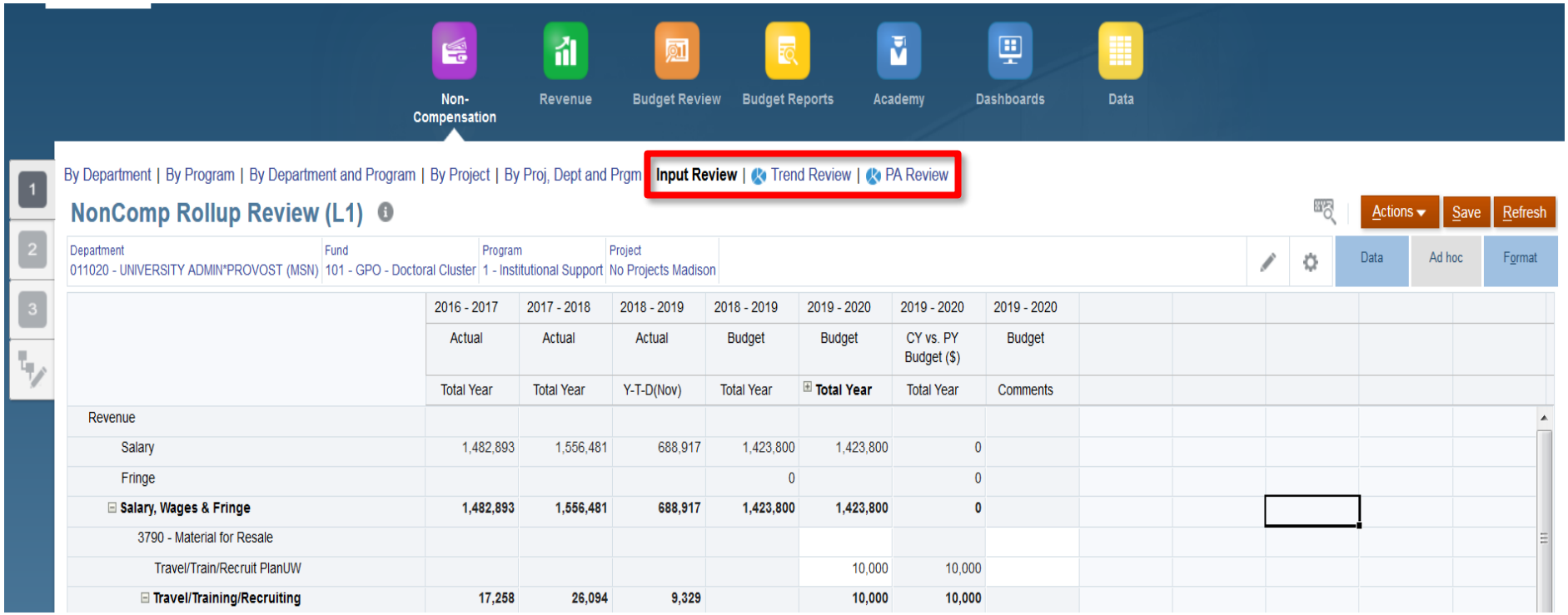
Reviewing Non Comp Data



	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(Nov)	Total Year	**Total Year**	Total Year	Comments
Revenue							
Salary	1,482,893	1,556,481	688,917	1,423,800	1,423,800	0	
Fringe				0		0	
Salary, Wages & Fringe	**1,482,893**	**1,556,481**	**688,917**	**1,423,800**	**1,423,800**	**0**	
3790 - Material for Resale							
Travel/Train/Recruit PlanUW					10,000	10,000	
Travel/Training/Recruiting	**17,258**	**26,094**	**9,329**		**10,000**	**10,000**	

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

1. **Input Review** **note that this form offers the ability to enter and review**
2. **Trend Review**
3. **PA Review level**

Reviewing Non Comp Data – Input Review

The Input Review form is a hybrid form that allows for review and data entry. This form allows you to see prior year actuals for specific Department – Fund – Program – Project combinations and enter data at the Level 1 budget accounts.

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

NonComp Rollup Review (L1)

Department	Fund	Program	Project
011020 - UNIVERSITY ADMIN*PROVOST (MSN)	101 - GPO - Doctoral Cluster	1 - Institutional Support	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
	Total Year	Total Year	Y-T-D(Nov)	Total Year	**Total Year**	Total Year	Comments
Revenue							
Salary	1,482,893	1,556,481	688,917	1,423,800	1,423,800	0	
Fringe				0		0	
Salary, Wages & Fringe	**1,482,893**	**1,556,481**	**688,917**	**1,423,800**	**1,423,800**	**0**	
3790 - Material for Resale							
Travel/Train/Recruit PlanUW					10,000	10,000	
Travel/Training/Recruiting	**17,258**	**26,094**	**9,329**		**10,000**	**10,000**	
Maint & Repairs PlanUW							
Maint & Repairs	**3,012**	**4,095**	**2,087**				
Utilities PlanUW							
Utilities							
Supplies PlanUW							
Supplies	**5,914**	**6,186**	**3,395**				
Services PlanUW							
Services	**23,263**	**11,217**	**3,758**				
Misc Expense PlanUW							
Miscellaneous Expense	**24,009**	**11,905**	**4,705**				
Supplies and Expense	**73,457**	**59,496**	**23,274**	**79,445**	**10,000**	**(69,445)**	

Reviewing Non Comp Data – Input Review

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

NonComp Rollup Review (L1)

1 2 3

Department	Fund	Program	Project
011020 - UNIVERSITY ADMIN*PROVOST (MSN)	101 - GPO - Doctoral Cluster	1 - Institutional Support	No Projects Madison

	2016 - 2017 Actual Total Year	2017 - 2018 Actual Total Year	2018 - 2019 Actual Y-T-D(Nov)	2018 - 2019 Budget Total Year	2019 - 2020 Budget Total Year	2019 - 2020 CY vs. PY Budget ($) Total Year	2019 - 2020 Budget Comments
Revenue							
Salary	1,482,893	1,556,481	688,917	1,423,800	1,423,800	0	
Fringe				0		0	
Salary, Wages & Fringe	**1,482,893**	**1,556,481**	**688,917**	**1,423,800**	**1,423,800**	**0**	
3790 - Material for Resale							
Travel/Train/Recruit PlanUW					10,000	10,000	
Travel/Training/Recruiting	**17,258**	**26,094**	**9,329**		**10,000**	**10,000**	
Maint & Repairs PlanUW							
Maint & Repairs	**3,012**	**4,095**	**2,087**				
Utilities PlanUW							
Utilities							
Supplies PlanUW							
Supplies	**5,914**	**6,186**	**3,395**				
Services PlanUW							
Services	**23,263**	**11,217**	**3,758**				
Misc Expense PlanUW							
Miscellaneous Expense	**24,009**	**11,905**	**4,705**				
Supplies and Expense	**73,457**	**59,496**	**23,274**	**79,445**	**10,000**	**(69,445)**	

1. Actual data (FY17, FY18, FY19 YTD)
2. FY19 Redbook (Major Class)
3. FY20 Budget Entry Data – this will show any values entered from any of the previous web forms. You also have the opportunity to adjust and/or input budget at Level 1 budget accounts inside of this form.

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Reviewing Non Comp Data – Input Review

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

2

NonComp Rollup Review (L1)

Actions | Save

Department	Fund	Program	Project
011020 - UNIVERSITY ADMIN*PROVOST (MSN)	101 - GPO - Doctoral Cluster	1 - Institutional Support	No Projects Madison

Data | Ad hoc

	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(Nov)	Total Year	**Total Year**	Total Year	Comments
Revenue							
Salary	1,482,893	1,556,481	688,917	1,423,800	1,423,800	0	
Fringe				0		0	
Salary, Wages & Fringe	**1,482,893**	**1,556,481**	**688,917**	**1,423,800**	**1,423,800**	**0**	
3790 - Material for Resale							
Travel/Train/Recruit PlanUW					10,000	10,000	
Travel/Training/Recruiting	**17,258**	**26,094**	**9,329**		**10,000**	**10,000**	
Maint & Repairs PlanUW					3,000		
Maint & Repairs	**3,012**	**4,095**	**2,087**				
Utilities PlanUW							

1

As mentioned in a previous slide, you can also use the Input Review tab to enter in budget data inside Level 1 budget accounts. To do so:

1. Make a change to any data within an editable cell
2. Save data.

Reviewing Non Comp Data – Input Review

Compensation

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

NonComp Rollup Review (L1)

Department	Fund	Program	Project
011020 - UNIVERSITY ADMIN*PROVOST (MSN)	101 - GPO - Doctoral Cluster	1 - Institutional Support	No Projects Madison

	2016 - 2017 Actual Total Year	2017 - 2018 Actual Total Year	2018 - 2019 Actual Y-T-D(Nov)	2018 - 2019 Budget Total Year	2019 - 2020 Budget **Total Year**	2019 - 2020 CY vs. PY Budget ($) Total Year	2019 - 2020 Budget Comments
Revenue							
Salary	1,482,893	1,556,481	688,917	1,423,800	1,423,800	0	
Fringe				0		0	
Salary, Wages & Fringe	**1,482,893**	**1,556,481**	**688,917**	**1,423,800**	**1,423,800**	**0**	
3790 - Material for Resale							
Travel/Train/Recruit PlanUW					10,000	10,000	
Travel/Training/Recruiting	**17,258**	**26,094**	**9,329**		**10,000**	**10,000**	
Maint & Repairs PlanUW					3,000	3,000	
Maint & Repairs	**3,012**	**4,095**	**2,087**		**3,000**	**3,000**	
Utilities PlanUW							
Utilities							
Supplies PlanUW							
Supplies	**5,914**	**6,186**	**3,395**				
Services PlanUW							
Services	**23,263**	**11,217**	**3,758**				
Misc Expense PlanUW							
Miscellaneous Expense	**24,009**	**11,905**	**4,705**				
Supplies and Expense	**73,457**	**59,496**	**23,274**	**79,445**	**13,000**	**(66,445)**	

You can see the adjustments are now reflected in the Level 1 budget account (Maint & Repairs PlanUW) and Major Class (Supplies and Expenses)

Reviewing Non Comp Data – Trend Review

To conduct a **Trend Review**, click on the **Trend Review** tab.

Non-Compensation | Revenue | Budget Review | Budget Reports | Academy | Dashboards | Data

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

Actions | Save | Refresh

Department	Fund	Project
011020 - UNIVERSITY ADMIN*PROVOST (MSN)	101 - GPO - Doctoral Cluster	No Projects Madison

Data | Ad hoc | Format

		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	Nov YTD	Total Year	Total Year	Total Year		Total Year
Program Total	Revenue								
Program Total	Permanent FTE						10		10
	Graduate Asst FTE								
Program Total	Fringe				0				0
	Salary	1,482,893	1,556,481	688,917	1,423,800		1,423,800		0
Program Total	Salary, Wages & Fringe	1,482,893	1,556,481	688,917	1,423,800		1,423,800		0
Program Total	Aid to Individuals & Organizations				0				0
	Capital Expense				0				0
	Debt Service								
	Supplies and Expense	73,457	65,072	23,274	79,445		13,000		(66,445)
	Sales Credits				0				0
	Special Purpose				0				0

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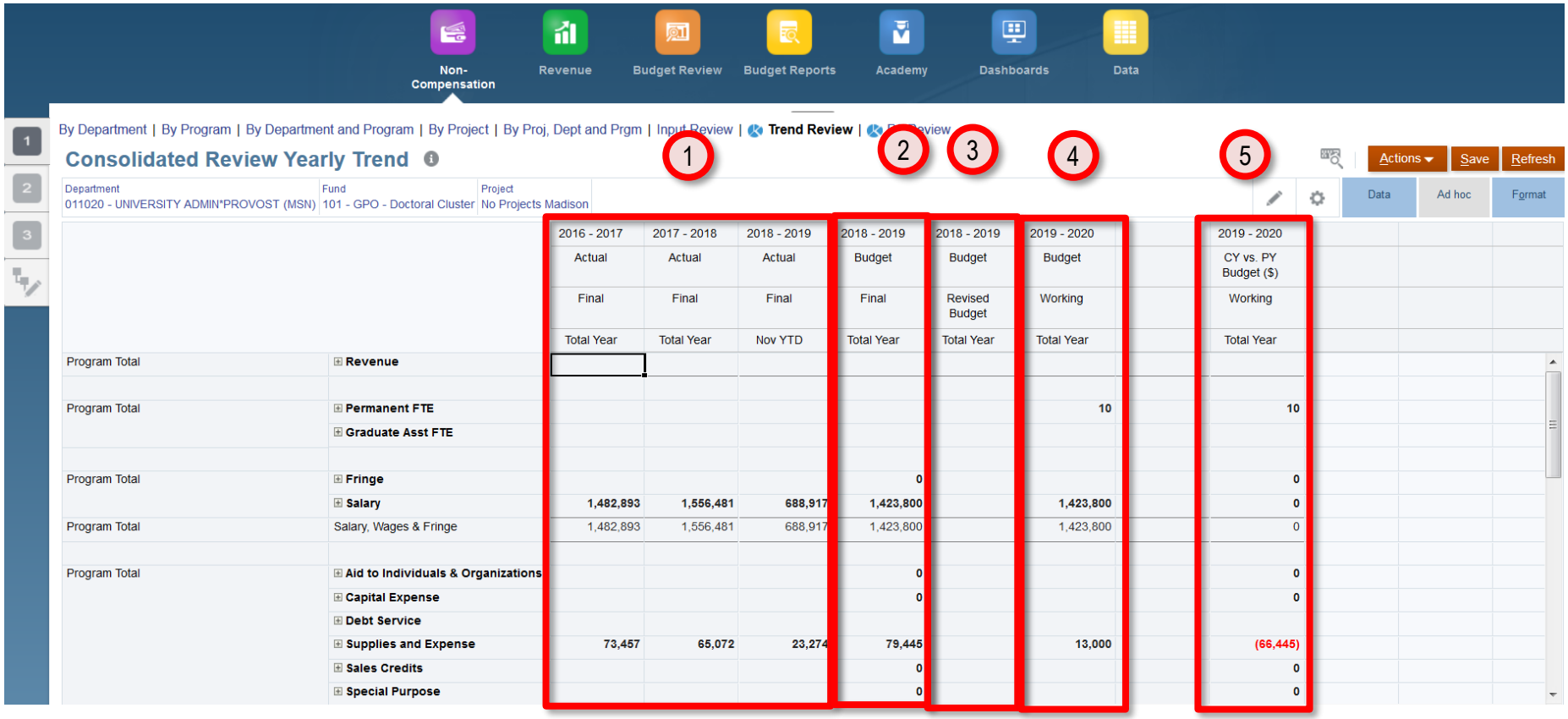
Reviewing Non Comp Data – Trend Review

A summary of the data that is available in the Trend Review:

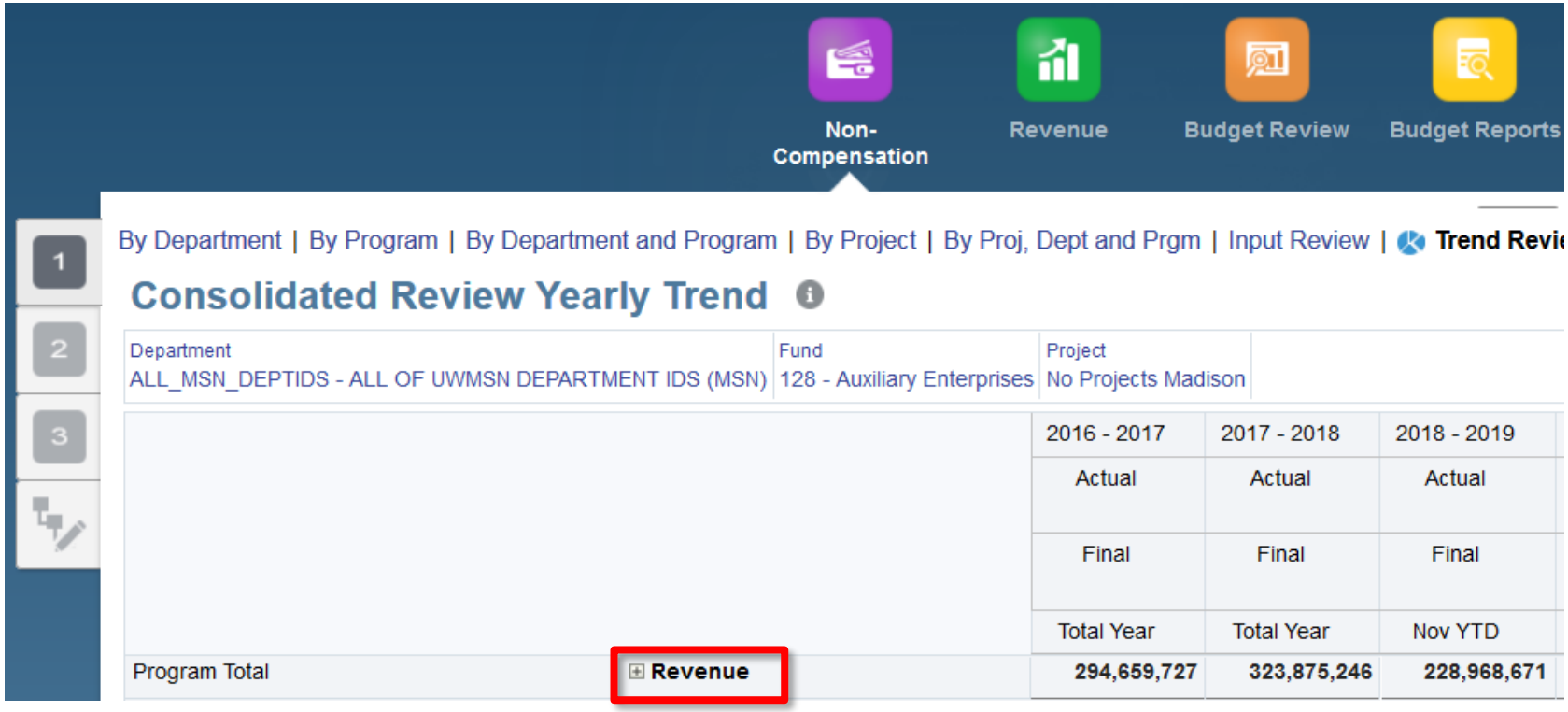
1. Actual data.
2. View the current fiscal year's Redbook Budget
3. View the current fiscal year's Revised Budget (not yet loaded)
4. FY20 Working Budget (shows info from data forms/CAT)
5. Validate the Working vs. Redbook Budget Variance



		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	Nov YTD	Total Year	Total Year	Total Year	Total Year
Program Total	Revenue							
Program Total	Permanent FTE						10	10
	Graduate Asst FTE							
Program Total	Fringe				0			0
	Salary	1,482,893	1,556,481	688,917	1,423,800		1,423,800	0
Program Total	Salary, Wages & Fringe	1,482,893	1,556,481	688,917	1,423,800		1,423,800	0
Program Total	Aid to Individuals & Organizations				0			0
	Capital Expense				0			0
	Debt Service							
	Supplies and Expense	73,457	65,072	23,274	79,445		13,000	(66,445)
	Sales Credits				0			0
	Special Purpose				0			0

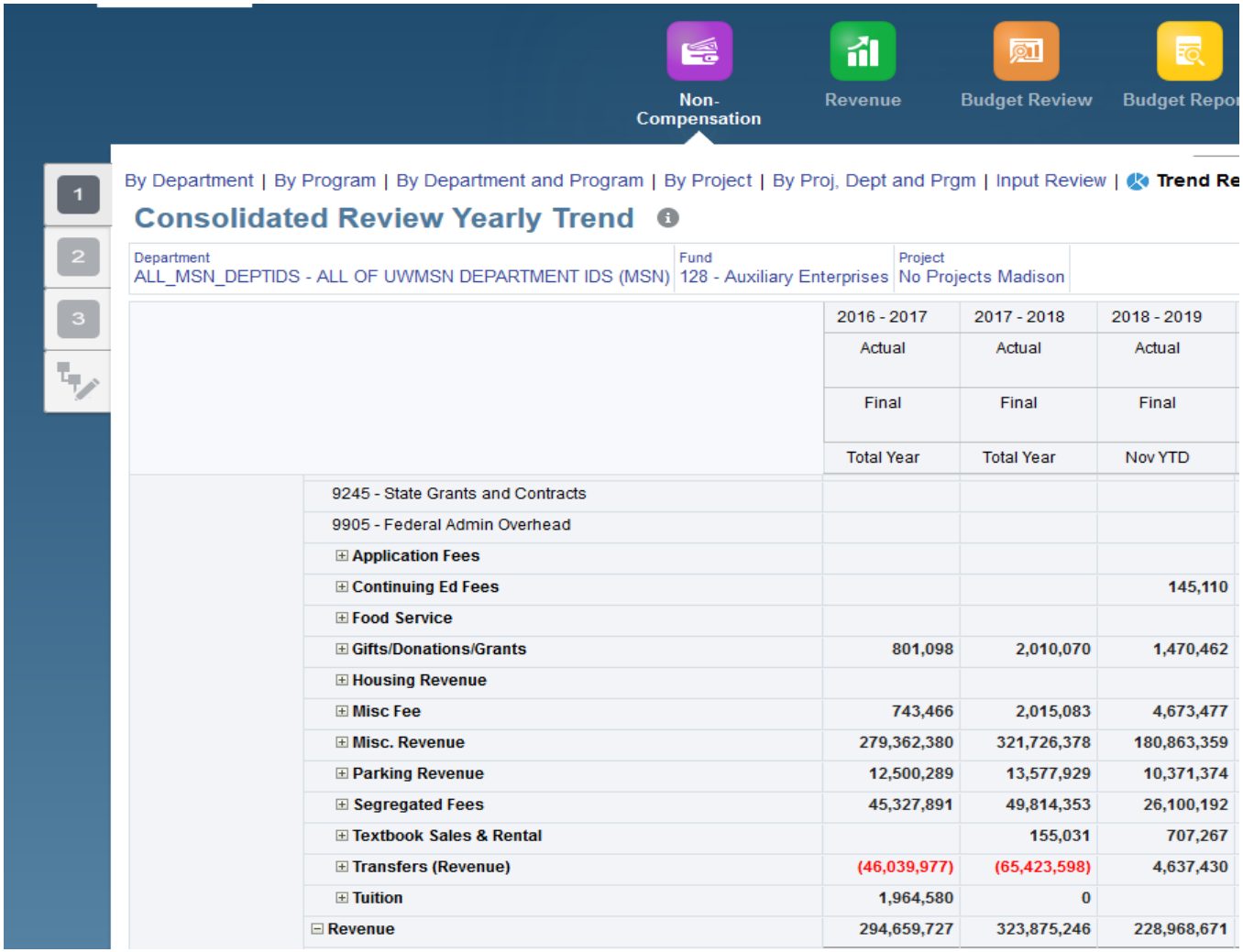
Reviewing Non Comp Data – Trend Review

The Trend Review provides multiple ways to review actuals and budget data. You are able to drill into the different categories to expose the different levels of Revenue and Expenditure. You can expose lower levels of data by clicking on the "+" and bring them back up by clicking on the "-" once exposed.



Reviewing Non Comp Data – Trend Review

You can see the expansion of data in the below screen. You can continue to drill into the data until you get to the account code level or roll back up by clicking on the "-"



	2016 - 2017	2017 - 2018	2018 - 2019
	Actual	Actual	Actual
	Final	Final	Final
	Total Year	Total Year	Nov YTD
9245 - State Grants and Contracts			
9905 - Federal Admin Overhead			
⊞ Application Fees			
⊞ Continuing Ed Fees			145,110
⊞ Food Service			
⊞ Gifts/Donations/Grants	801,098	2,010,070	1,470,462
⊞ Housing Revenue			
⊞ Misc Fee	743,466	2,015,083	4,673,477
⊞ Misc. Revenue	279,362,380	321,726,378	180,863,359
⊞ Parking Revenue	12,500,289	13,577,929	10,371,374
⊞ Segregated Fees	45,327,891	49,814,353	26,100,192
⊞ Textbook Sales & Rental		155,031	707,267
⊞ Transfers (Revenue)	(46,039,977)	(65,423,598)	4,637,430
⊞ Tuition	1,964,580	0	
⊟ Revenue	294,659,727	323,875,246	228,968,671

Reviewing Non Comp Data – Trend Review

The Trend Review form also allows you the ability to aggregate the data at different the Department, Fund, and Project levels by altering the POV. As an example, you can look at data for all Division 01, All Funds (Fund Total), and All Project and Non-Project data (Madison Project Total):

Non-Compensation | Revenue | Budget Review | Budget Reports | Academy | Dashboards | Data

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

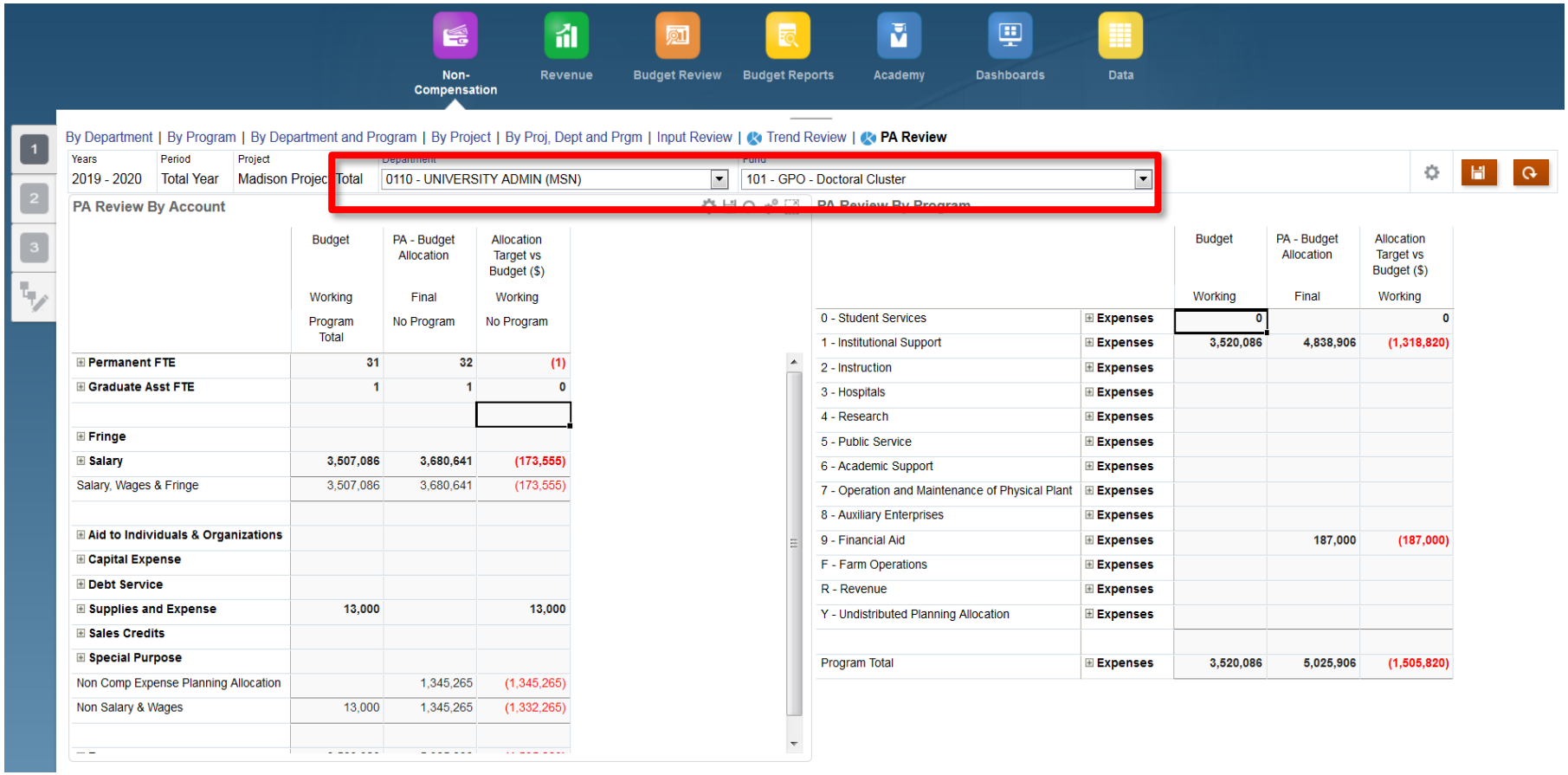
Consolidated Review Yearly Trend

Department	Fund	Project
01 - GENERAL EDUCATIONAL ADMIN (MSN)	Fund Total	Madison Project Total

		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	Nov YTD	Total Year	Total Year	Total Year		Total Year
Program Total	**Revenue**	**5,648,546**	**5,851,353**	**(73,910)**					
Program Total	**Permanent FTE**						**40**		**40**
	Graduate Asst FTE						**1**		**1**
Program Total	**Fringe**	**1,293,555**	**1,283,764**	**661,134**	**320**				**(320)**
	Salary	**4,757,164**	**4,831,566**	**2,366,041**	**5,085,939**		**5,085,939**		**0**
Program Total	Salary, Wages & Fringe	6,050,719	6,115,330	3,027,175	5,086,259		5,085,939		(320)
Program Total	**Aid to Individuals & Organizations**	**388,691**	**383,500**	**8,333**	**187,000**				**(187,000)**
	Capital Expense	**0**		**952**	**0**				**0**
	Debt Service								
	Supplies and Expense	**1,570,920**	**1,622,610**	**668,599**	**1,501,907**		**13,000**		**(1,488,907)**
	Sales Credits	**(35,063)**	**(37,324)**	**(1,644)**	**(28,000)**				**28,000**
	Special Purpose				**0**				**0**

Reviewing Non Comp Data – Planning Allocation

You also can access the PA Review inside of the Non-Compensation card. The goal of this form is to mirror the functionality of the Planning Allocation – Budget Allocation vs. Budget Request Report (Allocated vs. Budgeted). 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. Departments are mainly setup at the Division level (e.g. 53), there are some Division – Department groupings that align with normal check out procedures (e.g. 0110 shown below).



	Budget Working Program Total	PA - Budget Allocation Final No Program	Allocation Target vs Budget ($) Working No Program
Permanent FTE	31	32	(1)
Graduate Asst FTE	1	1	0
Fringe			
Salary	3,507,086	3,680,641	(173,555)
Salary, Wages & Fringe	3,507,086	3,680,641	(173,555)
Aid to Individuals & Organizations			
Capital Expense			
Debt Service			
Supplies and Expense	13,000		13,000
Sales Credits			
Special Purpose			
Non Comp Expense Planning Allocation		1,345,265	(1,345,265)
Non Salary & Wages	13,000	1,345,265	(1,332,265)

		Budget Working	PA - Budget Allocation Final	Allocation Target vs Budget ($) Working
0 - Student Services	Expenses	0		0
1 - Institutional Support	Expenses	3,520,086	4,838,906	(1,318,820)
2 - Instruction	Expenses			
3 - Hospitals	Expenses			
4 - Research	Expenses			
5 - Public Service	Expenses			
6 - Academic Support	Expenses			
7 - Operation and Maintenance of Physical Plant	Expenses			
8 - Auxiliary Enterprises	Expenses			
9 - Financial Aid	Expenses		187,000	(187,000)
F - Farm Operations	Expenses			
R - Revenue	Expenses			
Y - Undistributed Planning Allocation	Expenses			
Program Total	Expenses	3,520,086	5,025,906	(1,505,820)

Reviewing Non Comp Data – Planning Allocation

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.** This also includes **FTE.**

By Department | By Program | By Department and Program | By Project | By Proj, Dep

Years	Period	Project	Department
2019 - 2020	Total Year	Madison Project Total	0110 - UNIVERSITY ADMIN (MSN

PA Review By Account

	Budget Working Program Total	PA - Budget Allocation Final No Program	Allocation Target vs Budget ($) Working No Program
Permanent FTE	**31**	**32**	**(1)**
Graduate Asst FTE	**1**	**1**	**0**
Fringe			
Salary	**3,507,086**	**3,680,641**	**(173,555)**
Salary, Wages & Fringe	3,507,086	3,680,641	(173,555)
Aid to Individuals & Organizations			
Capital Expense			
Debt Service			
Supplies and Expense	**13,000**		**13,000**
Sales Credits			
Special Purpose			
Non Comp Expense Planning Allocation		1,345,265	(1,345,265)
Non Salary & Wages	13,000	1,345,265	(1,332,265)
Expenses	**3,520,086**	**5,025,906**	**(1,505,820)**

Reviewing Non Comp Data – Planning Allocation

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.**

Fund

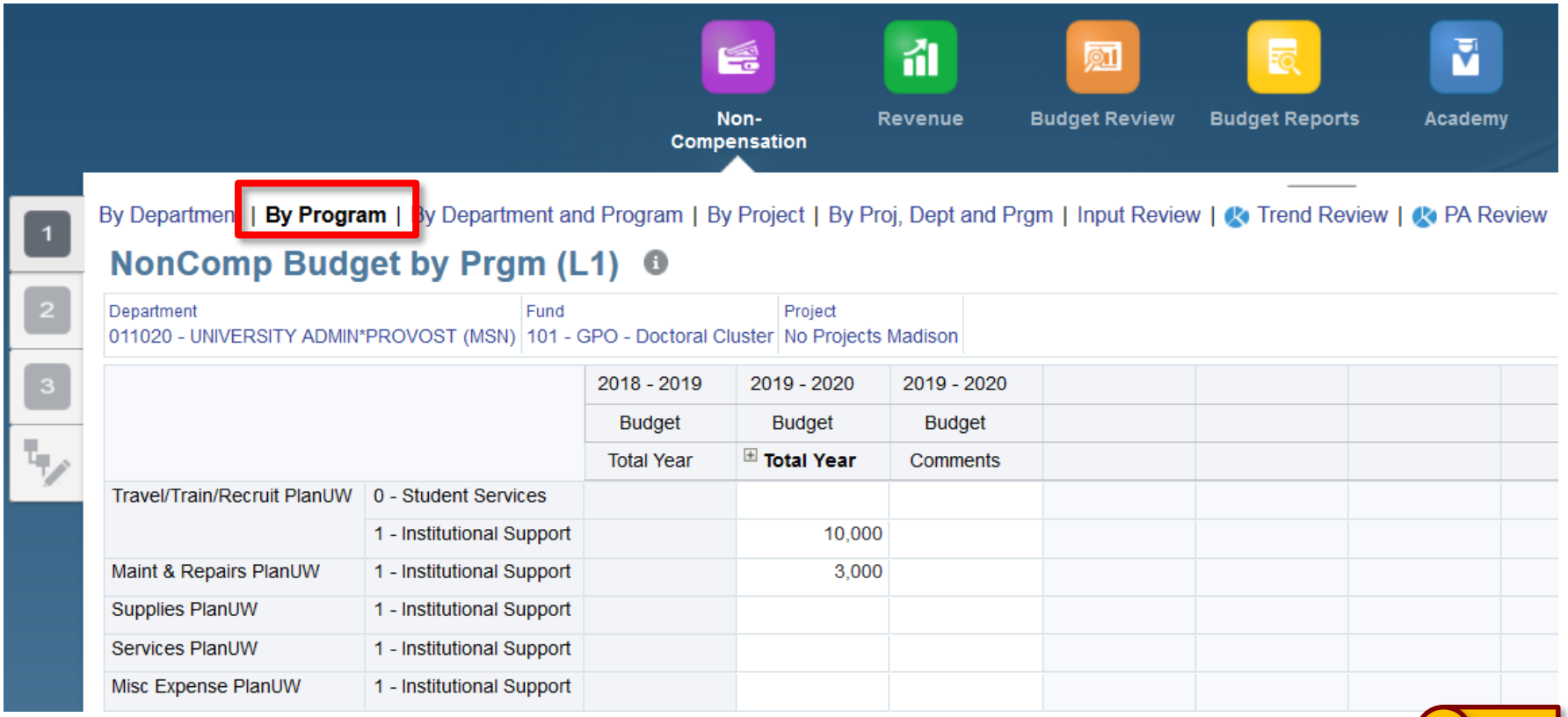
101 - GPO - Doctoral Cluster

PA Review By Program

		Budget	PA - Budget Allocation	Allocation Target vs Budget ($)
		Working	Final	Working
0 - Student Services	⊞ **Expenses**	**0**		**0**
1 - Institutional Support	⊞ **Expenses**	**3,520,086**	**4,838,906**	**(1,318,820)**
2 - Instruction	⊞ **Expenses**			
3 - Hospitals	⊞ **Expenses**			
4 - Research	⊞ **Expenses**			
5 - Public Service	⊞ **Expenses**			
6 - Academic Support	⊞ **Expenses**			
7 - Operation and Maintenance of Physical Plant	⊞ **Expenses**			
8 - Auxiliary Enterprises	⊞ **Expenses**			
9 - Financial Aid	⊞ **Expenses**		**187,000**	**(187,000)**
F - Farm Operations	⊞ **Expenses**			
R - Revenue	⊞ **Expenses**			
Y - Undistributed Planning Allocation	⊞ **Expenses**			
Program Total	⊞ **Expenses**	**3,520,086**	**5,025,906**	**(1,505,820)**

Non Comp Input Process – [L1] – By Program

For Non Comp Inputs **By Program**, navigate to the **By Program Form.** In this form Program is moved from the POV into a the form and Department is moved from the form into the POV.



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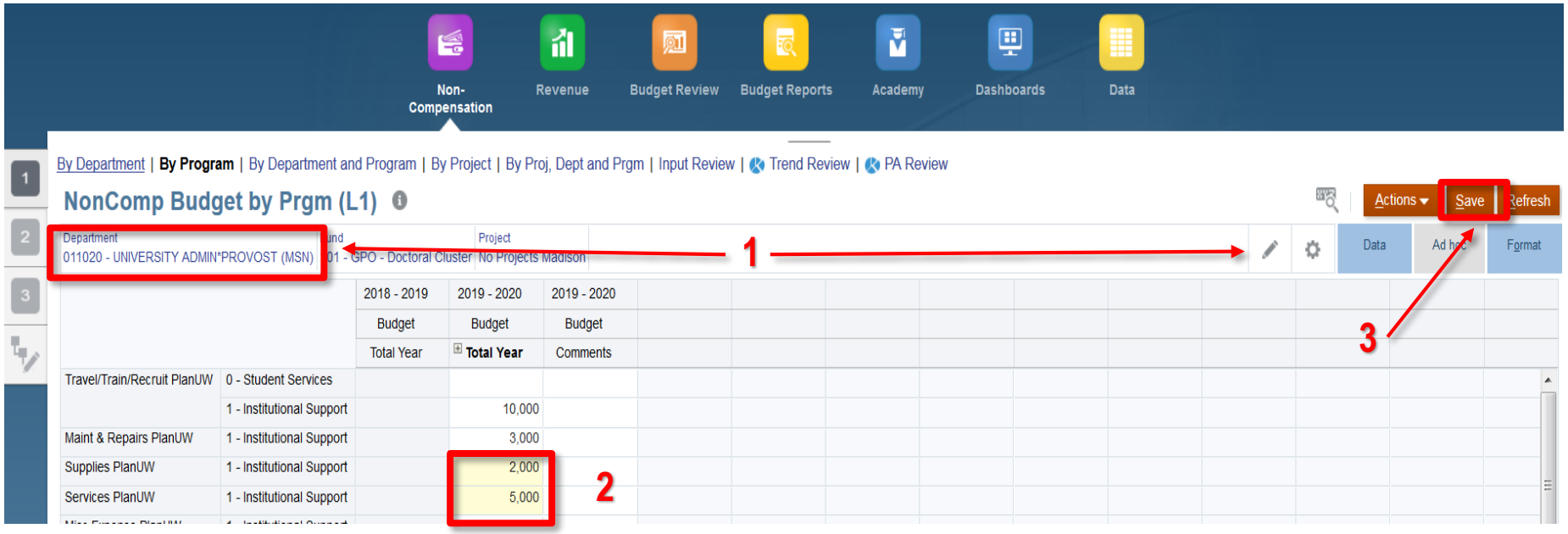
Note that the entries from the previous example "By Department" are showing here. Data entries that are made inside of the same intersection (Department, Fund, Program, Project) will show up inside of that same intersection inside of any of the data entry web forms.

Non Comp Input Process – [L1] – By Program

Other than the move of Program to the form and Department to the POV the process of budgeting By Program follows the same steps as the budgeting by Department form.



1. Select the Department, Fund and Project combination you want to budget to using either the Point of View (POV) OR the Pencil.
2. Input budget data
3. Save Data

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

For Non Comp Inputs **By Department and Program**, navigate to the **By Department and Program Form.** This brings Department and Program from the POV into the form. This form minimizes POV selections and moves to a scroll down approach.

Non-Compensation | Revenue | Budget Review | Budget Reports | Academy | Dashboards | 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 Dept and Prgm (L1)

Fund	Project
101 - GPO - Doctoral Cluster	No Projects Madison

			2018 - 2019	2019 - 2020	2019 - 2020
			Budget	Budget	Budget
			Total Year	**Total Year**	Comments
011000 - UNIVERSITY ADMIN*ADMIN (MSN)	1 - Institutional Support	Travel/Train/Recruit PlanUW			
		Misc Expense PlanUW			
011010 - UNIVERSITY ADMIN*CHAN OFC (MSN)	1 - Institutional Support	Travel/Train/Recruit PlanUW			
		Maint & Repairs PlanUW			
		Supplies PlanUW			
		Services PlanUW			
		Misc Expense PlanUW			
011020 - UNIVERSITY ADMIN*PROVOST (MSN)	0 - Student Services	Travel/Train/Recruit PlanUW			
	1 - Institutional Support	Travel/Train/Recruit PlanUW		10,000	
		Maint & Repairs PlanUW		3,000	
		Supplies PlanUW			
		Services PlanUW			
		Misc Expense PlanUW			
011021 - UNIVERSITY ADMIN*UGRAD AWARD (MSN)	0 - Student Services	Fellows & Scholars PlanUW			
011022 - UNIVERSITY ADMIN*REACCREDIT (MSN)	1 - Institutional Support	Travel/Train/Recruit PlanUW			
		Services PlanUW			
011023 - UNIVERSITY ADMIN*SCHOL PROG (MSN)	0 - Student Services	Services PlanUW			

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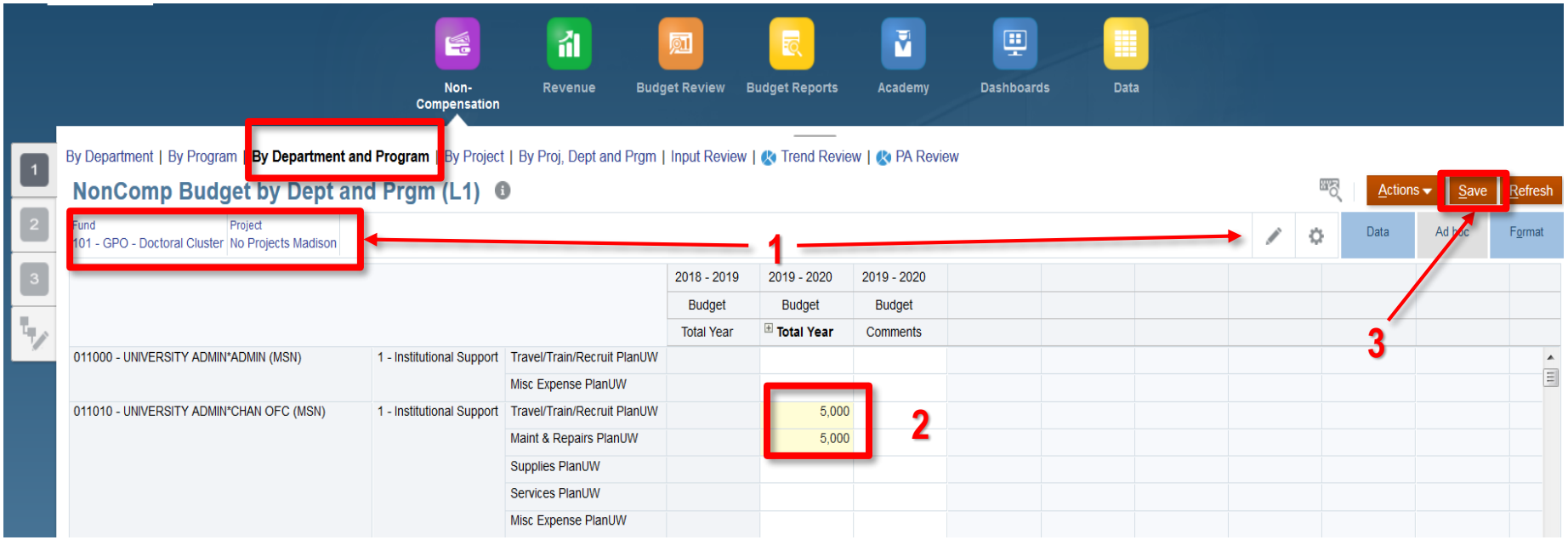
Non Comp Input Process – [L1] – By Department & Program

Other than the move of Department and Program to the form the process of budgeting "By Department and Program" follows the same steps as the previous forms.



1. Select the Department, Fund and Project combination you want to budget to using either the Point of View (POV) OR the Pencil.
2. Input budget data
3. Save Data

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

In class exercise:

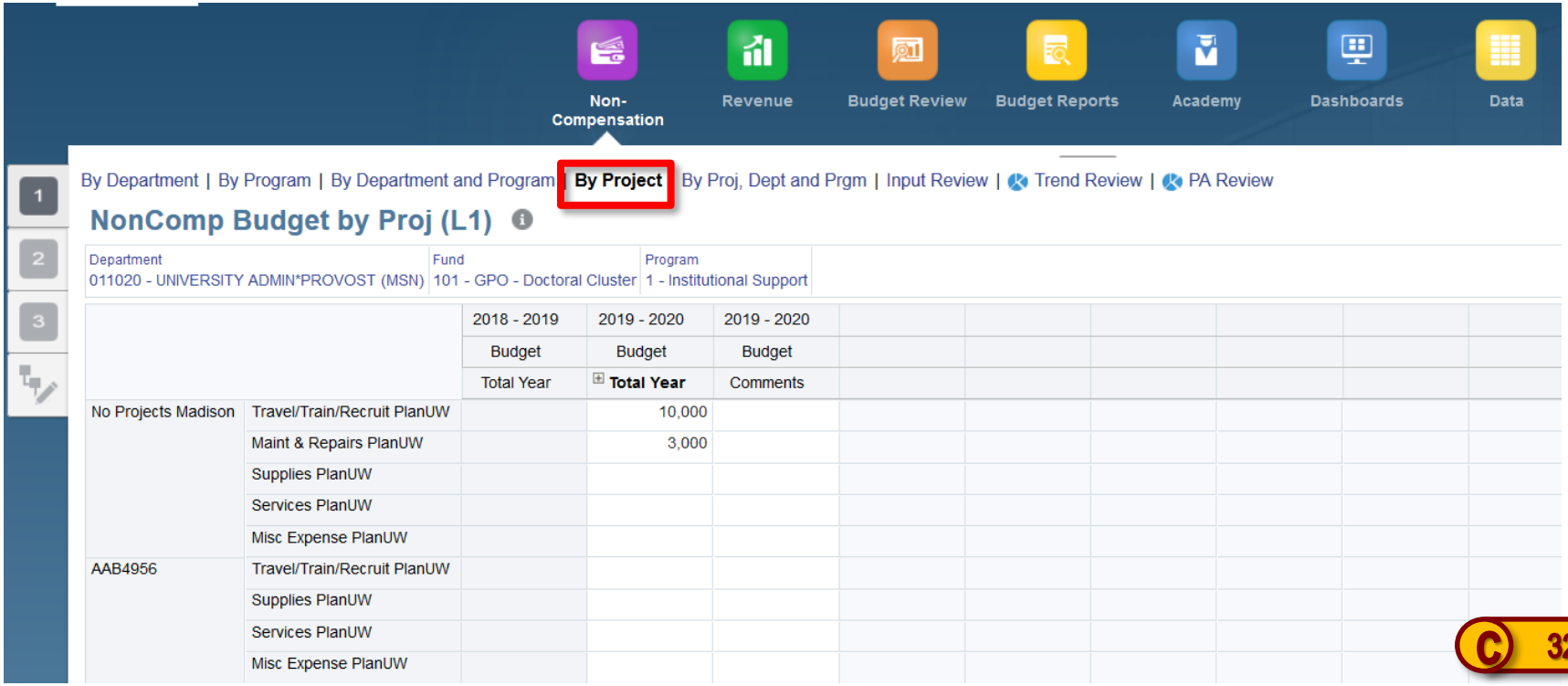
Using the **By Department & Program** form enter and save budget data for a (or multiple) intersections in your division. Use figures that are easy to remember/add.

Walk through the **Input Review, Trend Review** and **PA Review** forms and find the data in each.

Non Comp Input Process – [L1] – By Project

For Non Comp Inputs **By Project**, navigate to the **By Project form.** This brings Project into the form and out of the POV. As a reminder only projects that have been loaded to PlanUW will be available for budgeting. If you would like a project added please send a request with the project ID to PlanUW-MSN-MBO@vc.wisc.edu.

"No Projects Madison" is where data that is not associated with a project inside of PlanUW is tied to. This grouping would include any historical actuals that are (a) not on a project or (b) on a project that is not loaded to PlanUW.



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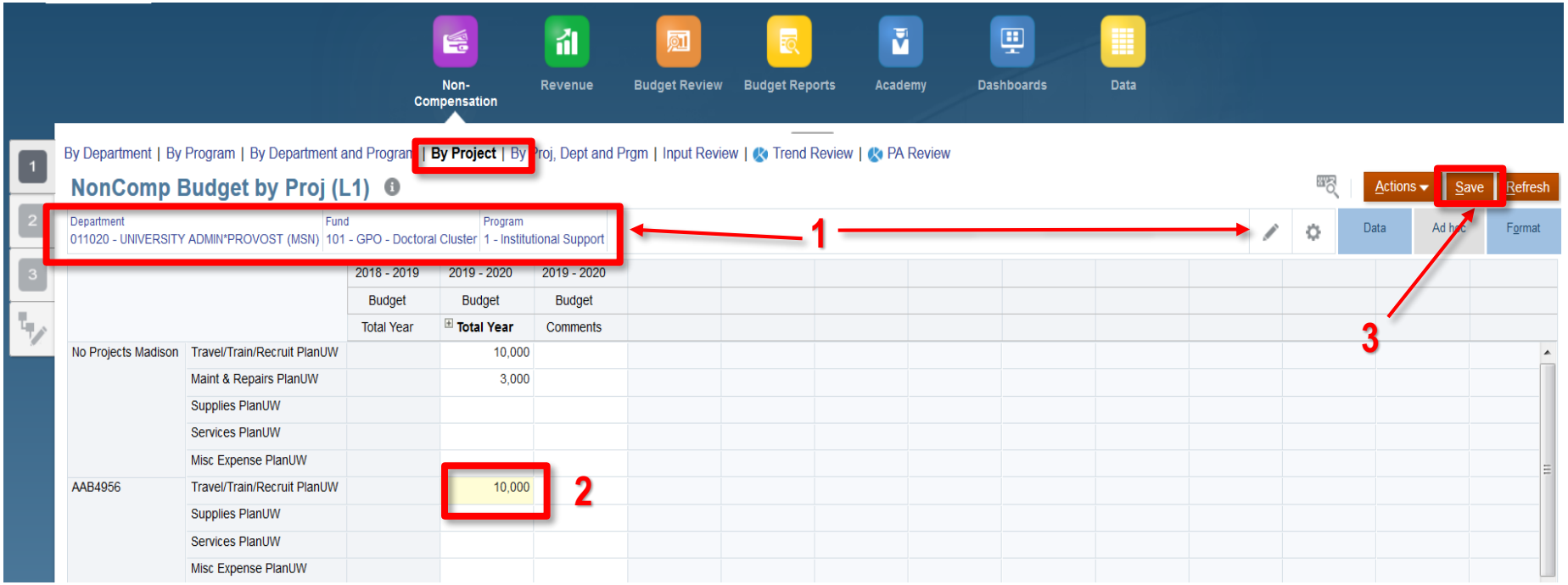
Non Comp Input Process – [L1] – By Project

Other than the move of Project to the form the process of budgeting "By Project" follows the same steps as the previous forms.



1. Select the Department, Fund and Program combination you want to budget to using either the Point of View (POV) OR the Pencil.
2. Input budget data
3. Save Data

Non Comp Input Process – [L1] – By Project

One reminder, when reviewing data for project entries you'll need to adjust the POV accordingly. If you want to see only the project information you'll need to select the specific project. Here is an example inside of the Input Review. You'd follow this same process inside of Trend Review:

Compensation

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

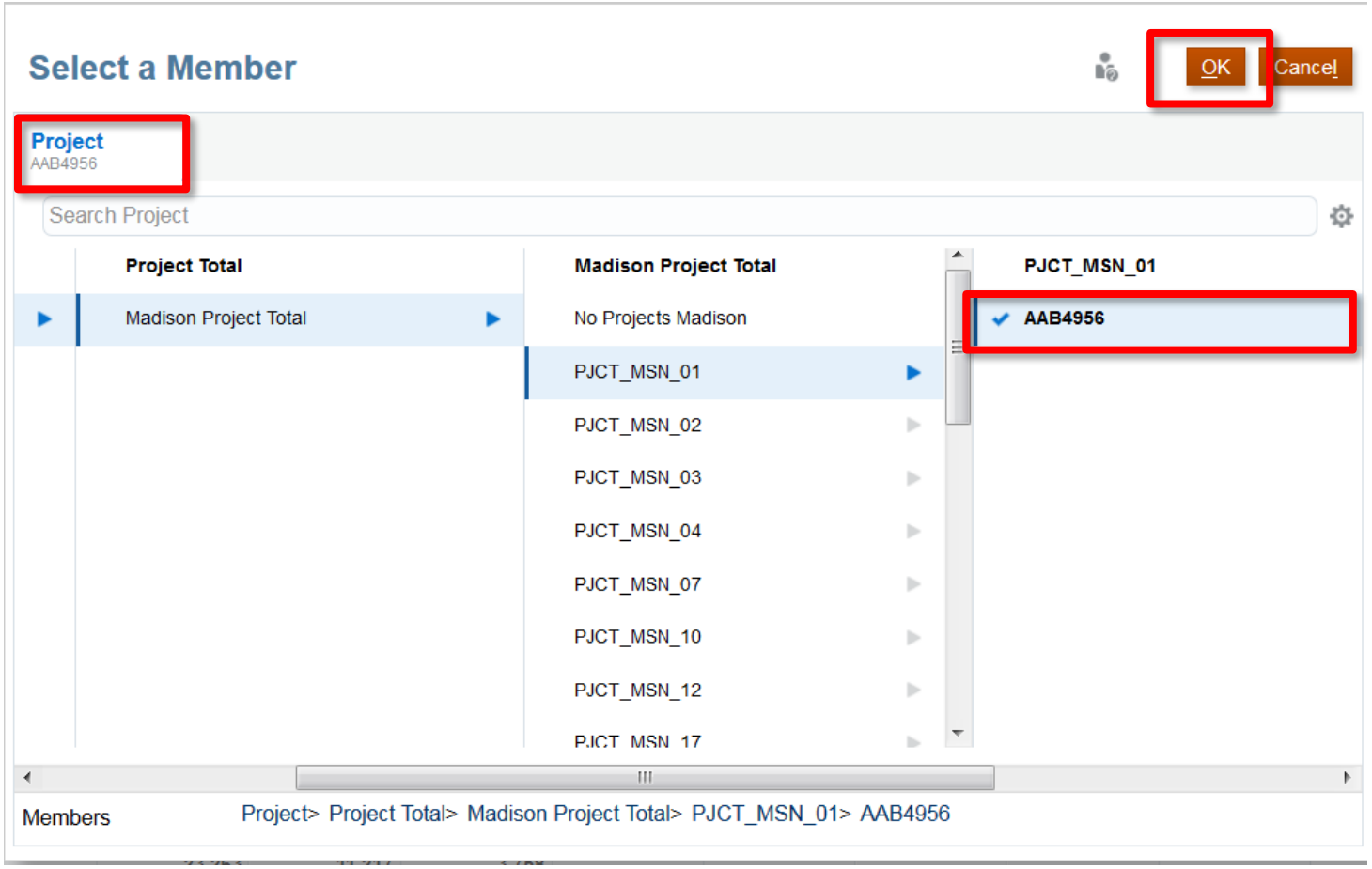
NonComp Rollup Review (L1)

Department	Fund	Program	Project
011020 - UNIVERSITY ADMIN*PROVOST (MSN)	101 - GPO - Doctoral Cluster	1 - Institutional Suppo	No Projects Madison

	2016 - 2017 Actual Total Year	2017 - 2018 Actual Total Year	2018 - 2019 Actual Y-T-D(Nov)	2018 - 2019 Budget Total Year	2019 - 2020 Budget **Total Year**	2019 - 2020 CY vs. PY Budget ($) Total Year	2019 - 2020 Budget Comments
Revenue							
Salary	1,482,893	1,556,481	688,917	1,423,800	1,423,800	0	
Fringe				0		0	
Salary, Wages & Fringe	**1,482,893**	**1,556,481**	**688,917**	**1,423,800**	**1,423,800**	**0**	
3790 - Material for Resale							
Travel/Train/Recruit PlanUW					10,000	10,000	
Travel/Training/Recruiting	**17,258**	**26,094**	**9,329**		**10,000**	**10,000**	
Maint & Repairs PlanUW					3,000	3,000	
Maint & Repairs	**3,012**	**4,095**	**2,087**		**3,000**	**3,000**	
Utilities PlanUW							
Utilities							
Supplies PlanUW							
Supplies	**5,914**	**6,186**	**3,395**				
Services PlanUW							
Services	**23,263**	**11,217**	**3,758**				
Misc Expense PlanUW							
Miscellaneous Expense	**24,009**	**11,905**	**4,705**				
Supplies and Expense	**73,457**	**59,496**	**23,274**	**79,445**	**13,000**	**(66,445)**	

Non Comp Input Process – [L1] – By Project

Selecting a project in the Input Review POV



Non Comp Input Process – [L1] – By Project

Results

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

NonComp Rollup Review (L1)

Department	Fund	Program	Project
011020 - UNIVERSITY ADMIN*PROVOST (MSN)	101 - GPO - Doctoral Cluster	1 - Institutional Suppo	AAB4956

Non-Compensation | Revenue | Budget Review | Budget Reports | Academy | Dashb

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

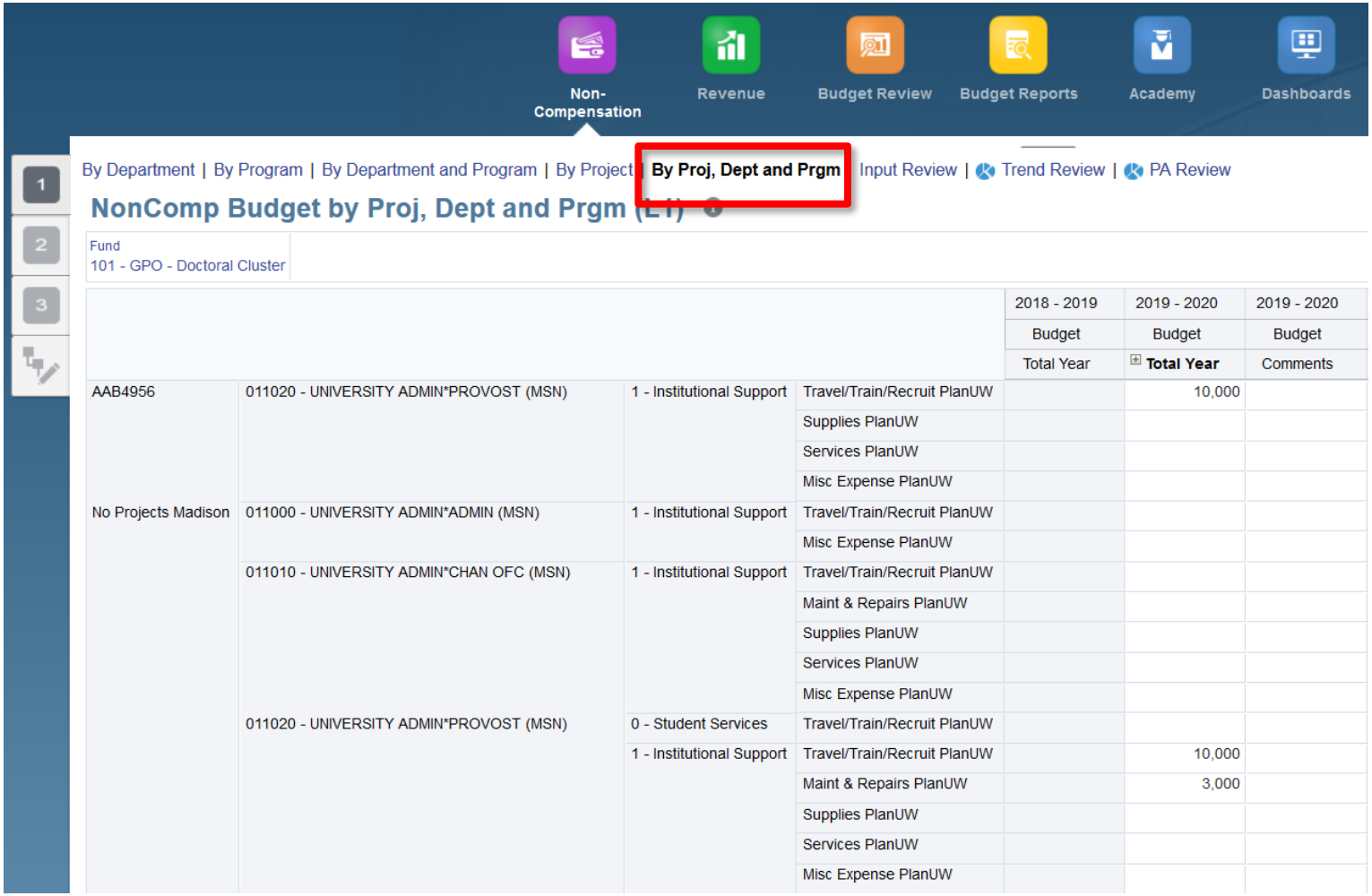
NonComp Rollup Review (L1)

Department	Fund	Program	Project
011020 - UNIVERSITY ADMIN*PROVOST (MSN)	101 - GPO - Doctoral Cluster	1 - Institutional Suppo	AAB4956

	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(Nov)	Total Year	**Total Year**	Total Year	Comments
Revenue							
Salary	3,347			0		0	
Fringe				0		0	
Salary, Wages & Fringe	**3,347**			**0**		**0**	
3790 - Material for Resale							
Travel/Train/Recruit PlanUW					10,000	10,000	
Travel/Training/Recruiting	**7,291**	**11,003**	**4,839**		**10,000**	**10,000**	
Maint & Repairs PlanUW							
Maint & Repairs							
Utilities PlanUW							
Utilities							
Supplies PlanUW							
Supplies		**576**					
Services PlanUW							

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

For Non Comp Inputs **By Proj, Dept**, and Prgm navigate to the **By Proj, Dept and Prgm Form.** This form brings Project, Department and Program from the POV into the form. This form minimizes POV selections and moves to a scroll through approach.



				2018 - 2019 Budget Total Year	2019 - 2020 Budget Total Year	2019 - 2020 Budget Comments
AAB4956	011020 - UNIVERSITY ADMIN*PROVOST (MSN)	1 - Institutional Support	Travel/Train/Recruit PlanUW		10,000	
			Supplies PlanUW			
			Services PlanUW			
			Misc Expense PlanUW			
No Projects Madison	011000 - UNIVERSITY ADMIN*ADMIN (MSN)	1 - Institutional Support	Travel/Train/Recruit PlanUW			
			Misc Expense PlanUW			
	011010 - UNIVERSITY ADMIN*CHAN OFC (MSN)	1 - Institutional Support	Travel/Train/Recruit PlanUW			
			Maint & Repairs PlanUW			
			Supplies PlanUW			
			Services PlanUW			
			Misc Expense PlanUW			
	011020 - UNIVERSITY ADMIN*PROVOST (MSN)	0 - Student Services	Travel/Train/Recruit PlanUW			
		1 - Institutional Support	Travel/Train/Recruit PlanUW		10,000	
			Maint & Repairs PlanUW		3,000	
			Supplies PlanUW			
			Services PlanUW			
			Misc Expense PlanUW			

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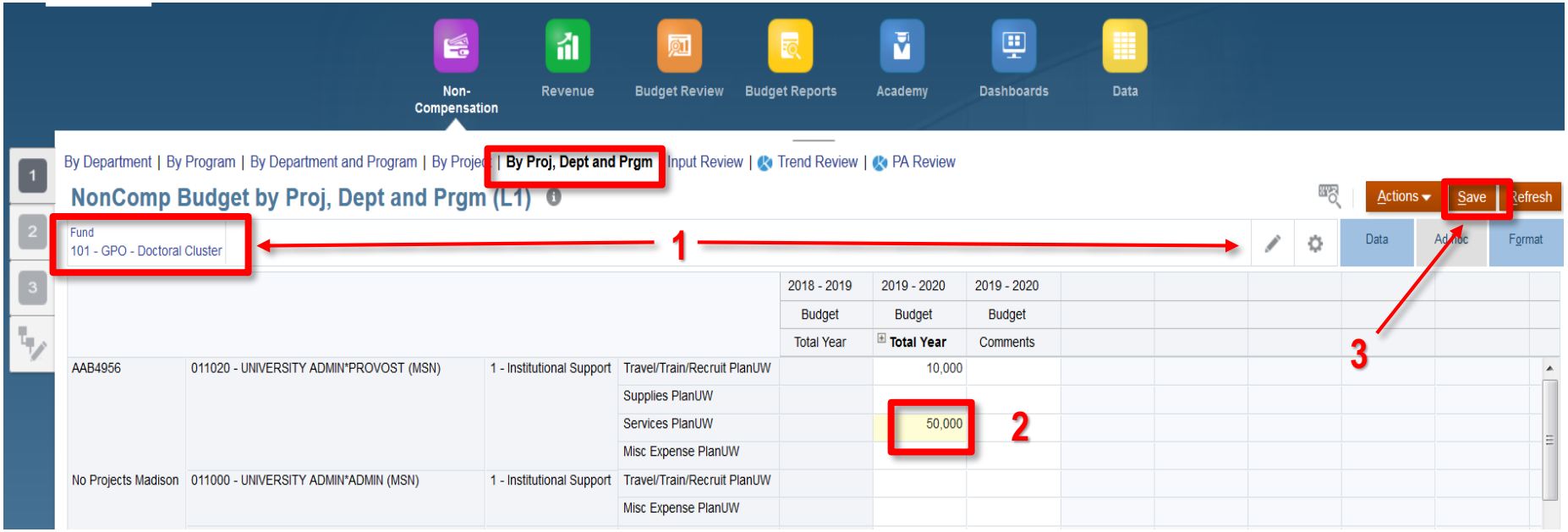
Non Comp Input Process – [L1] – By Proj, Dept and Prgm

The process of budgeting "By Pror, Dept, and Prgm" follows the same steps as the previous forms.



1. Select the Fund you want to budget to using either the Point of View (POV) OR the Pencil.
2. Input budget data
3. Save Data

What areas are unclear or could use further explanation?

Are there any exercises you'd like to walk through as a group or individually?

What if a DeptID, Budget Account or Project I need isn't present?

The PlanUW application is setup to suppress intersections that do not have prior actuals. This means if there are new DeptID's and/or projects that are in WISDM but have not been used they will not be initially viewable inside of the application. This also means that budget accounts that don't have prior actuals will not be exposed initially on the web forms.

We are working with Huron to determine how to expose this information for new Divisions or large changes to DeptID structure. The more likely scenario end users may run into is moving to a new budget account that has not been used in the past due a change in operations or the addition of a new project.

We will walk through two examples of adding a new budget accounts. The first will add a budget account to an existing – DeptID-Fund-Program combination. The second will add a new budget account to a DeptID-Fund-Program combination with not historical actuals. We will also show you how to remove opened budget accounts in the event you don't want the entire group displayed.

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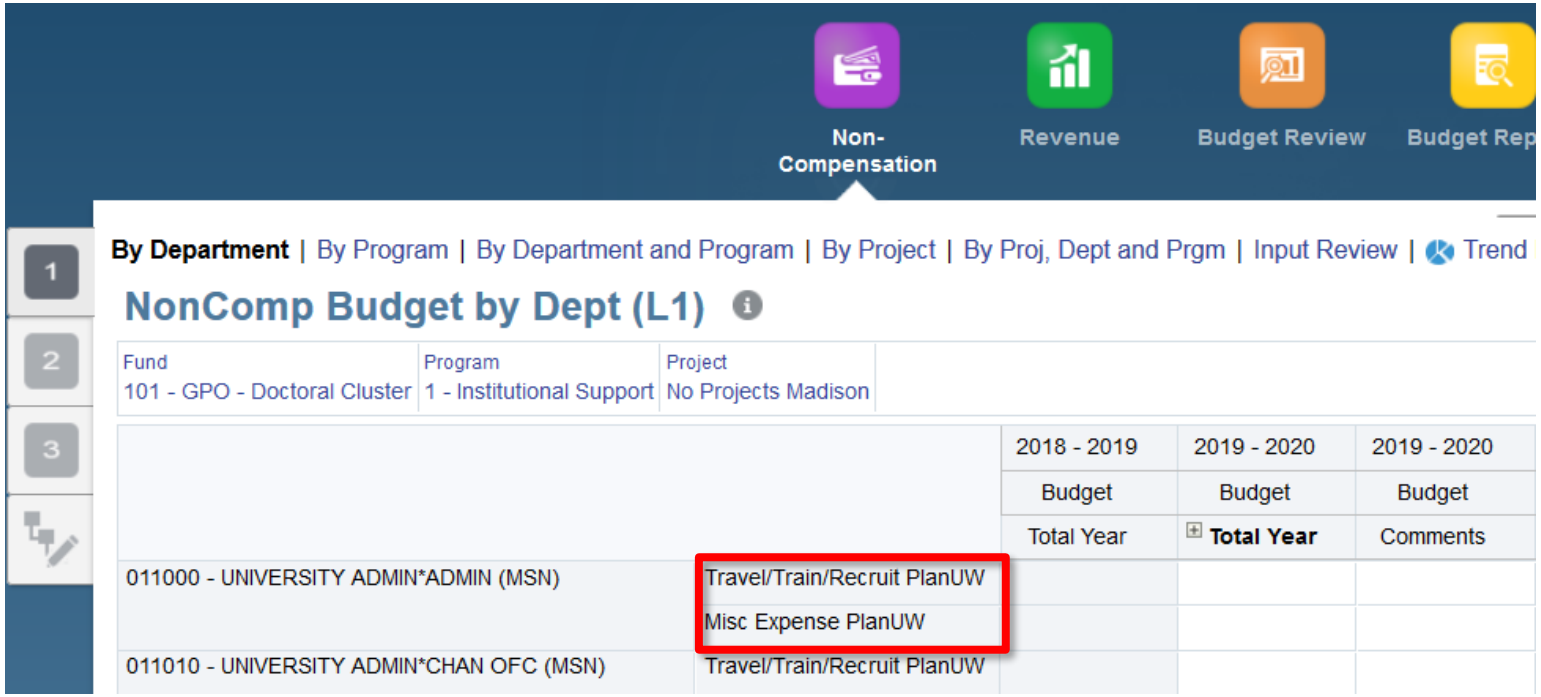
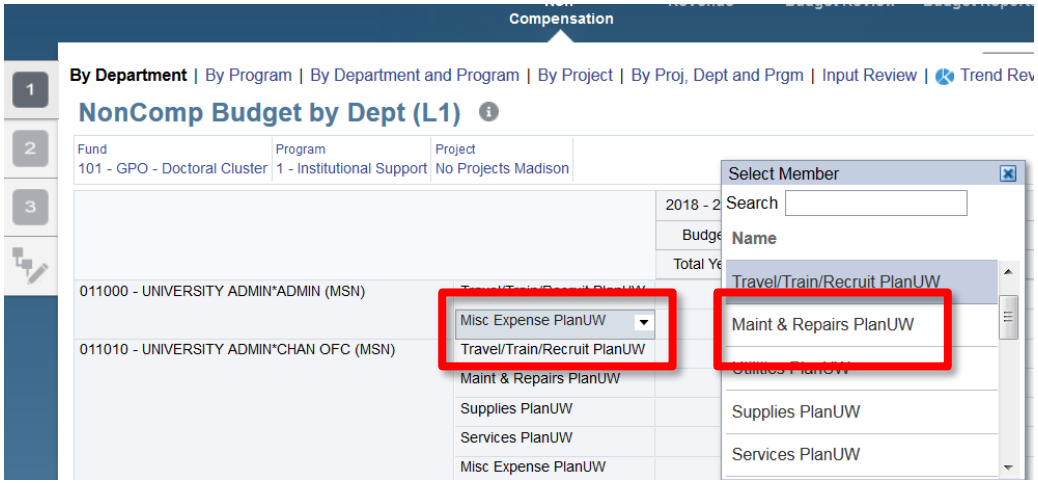
Non Comp Input Process – [L1] - Inserting a Wedge Scenario 1

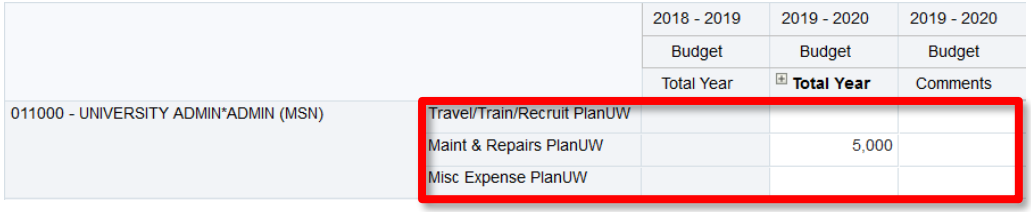
Scenario 1: You are planning to budget to a new budget account inside of an existing DeptID – Fund – Program combination that has not historically had actuals.

In this example I'm going to use 011000, and add in a "Maint & Repairs PlanUW" account which you can see from the below screen shot is not present.



Non Comp Input Process – [L1] - Inserting a Wedge Scenario 1





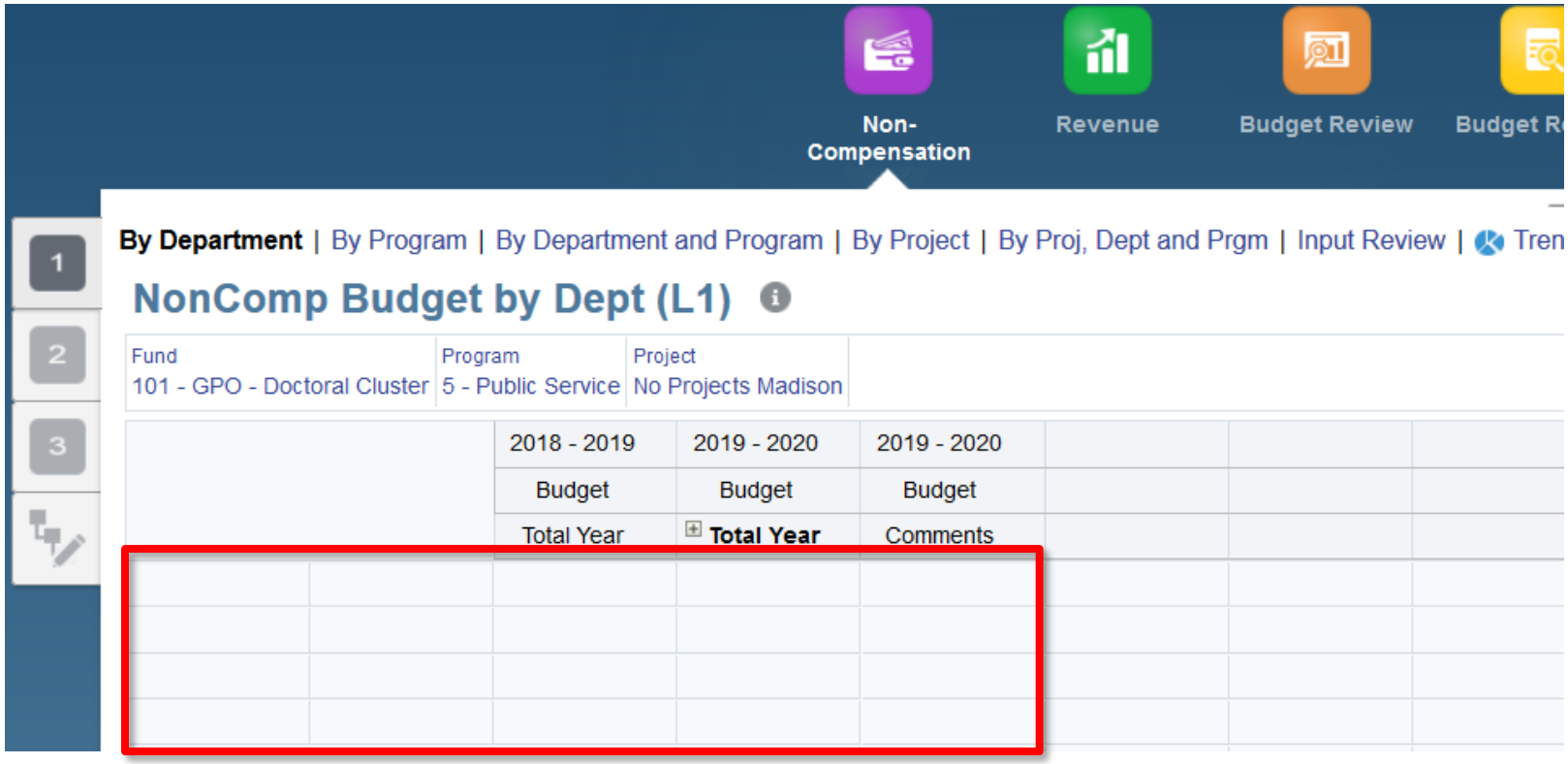
Save

1. Click on the down carrot in one of the budget accounts
2. Select budget category, in this case “Maint & Repairs PlanUW
3. You will see the category you selected appear to over right the other category, in this case Misc. Expense PlanUW. However once, you input an amount into the new account and click save, the old account will reappears (see #4)

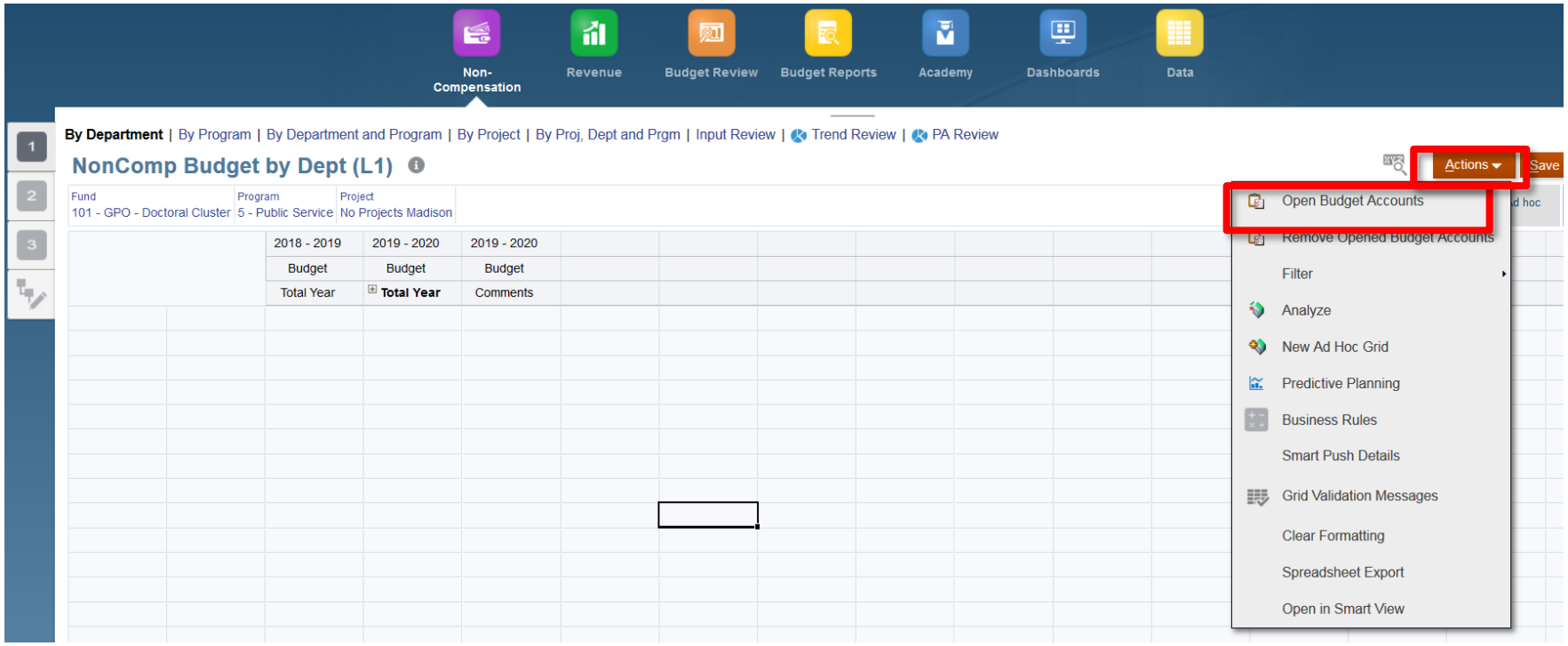
Non Comp Input Process – [L1] - Inserting a Wedge Scenario 2

Scenario 2: You are planning to budget to a new DeptID – Fund – Program – Project that has no prior actuals. For this example we'll use a new program code.

In this example I'm going to use 011000, and add in Level 1 Non-Compensation budget accounts for Program Code 5 which you can see from the below screen shot is not present.



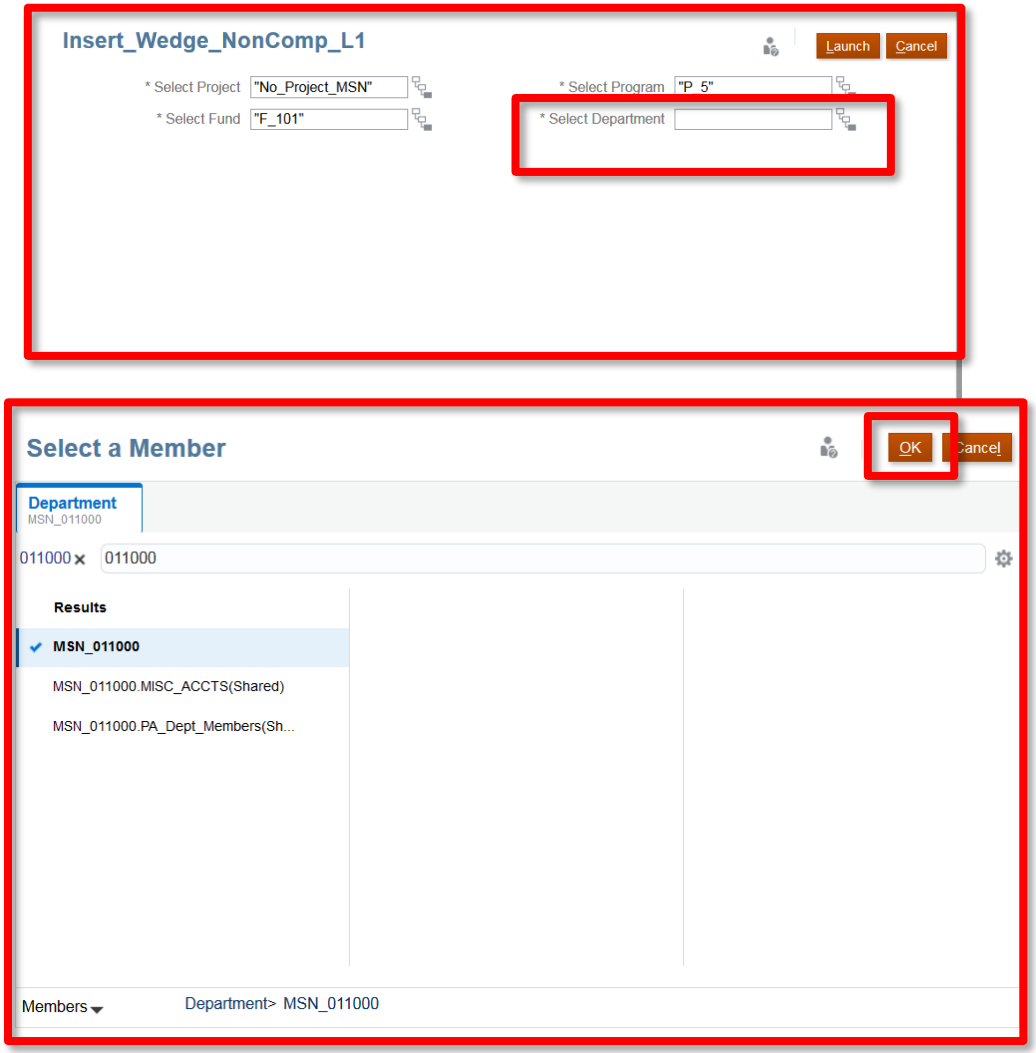
Non Comp Input Process – [L1] - Inserting a Wedge Scenario 2



To Open Budget Accounts go to Actions and select Open Budget Accounts

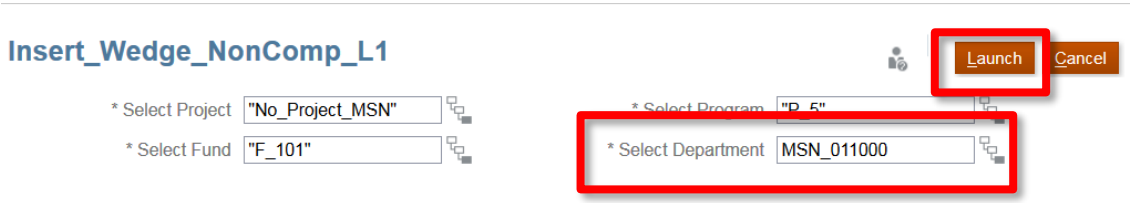
.

Non Comp Input Process – [L1] - Inserting a Wedge Scenario 2

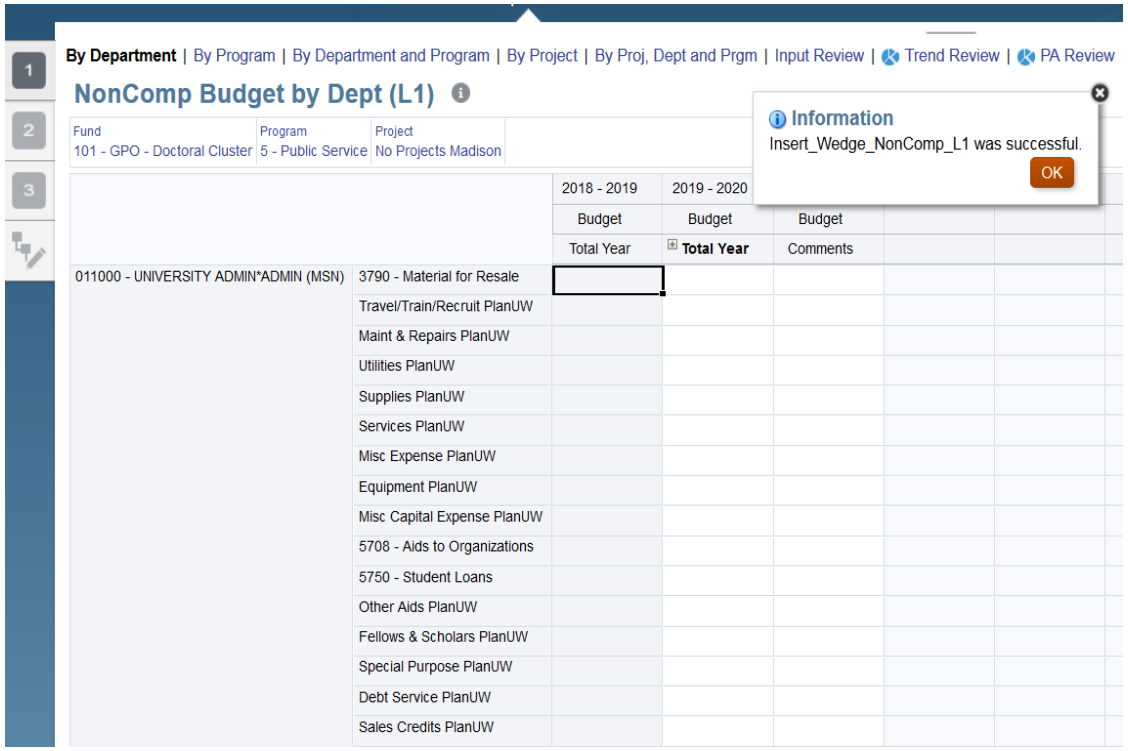


1. Inside of the Insert_Wedge_NonComp1_L1 area you need to select department by clicking on the
2. Once that is done you'll see the familiar "Select a Member" area where you can get to your department by using the search or hierarchy approach.
3. Once you have selected your department click "OK"

Non Comp Input Process – [L1] - Inserting a Wedge Scenario 2



1. You should see you department populated and can then click Launch.



2. You should then see an Information notification that the insert was successful and also now see all of the available Non-Compensation categories available for budget

Note – you can follow the same process for opening Revenue budget accounts as well inside of the Revenue section.

Non Comp Input Process – [L1] – Removing Open Budget Accounts

Compensation

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

NonComp Budget by Dept (L1)

Fund	Program	Project
101 - GPO - Doctoral Cluster	5 - Public Service	No Projects Madison

		2018 - 2019 Budget Total Year	2019 - 2020 Budget **Total Year**	2019 - 2020 Budget Comments
011000 - UNIVERSITY ADMIN*ADMIN (MSN)	3790 - Material for Resale			
	Travel/Train/Recruit PlanUW		50,000	
	Maint & Repairs PlanUW		50,000	
	Utilities PlanUW			
	Supplies PlanUW			
	Services PlanUW			
	Misc Expense PlanUW			
	Equipment PlanUW			
	Misc Capital Expense PlanUW			
	5708 - Aids to Organizations			
	5750 - Student Loans			
	Other Aids PlanUW			
	Fellows & Scholars PlanUW			
	Special Purpose PlanUW			
	Debt Service PlanUW			
	Sales Credits PlanUW			

In the event you had to open all budget accounts but only needed to budget to a few you can remove the accounts not used by using the following approach.

Non Comp Input Process – [L1] – Removing Open Budget Accounts

Compensation

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

NonComp Budget by Dept (L1)

Fund	Program	Project
101 - GPO - Doctoral Cluster	5 - Public Service	No Projects Madison

		2018 - 2019	2019 - 2020	2019 - 2020
		Budget	Budget	Budget
		Total Year	**Total Year**	Comments
011000 - UNIVERSITY ADMIN*ADMIN (MSN)	3790 - Material for Resale			
	Travel/Train/Recruit PlanUW		50,000	
	Maint & Repairs PlanUW		50,000	
	Utilities PlanUW			
	Supplies PlanUW			
	Services PlanUW			
	Misc Expense PlanUW			
	Equipment PlanUW			
	Misc Capital Expense PlanUW			
	5708 - Aids to Organizations			
	5750 - Student Loans			
	Other Aids PlanUW			
	Fellows & Scholars PlanUW			
	Special Purpose PlanUW			
	Debt Service PlanUW			
	Sales Credits PlanUW			

All Budget Accounts may not be used once they are opened. To improve visibility on a form the budget accounts that are not used can be removed. In the **Actions** drop down on the form select **Remove Opened Budget Accounts.**

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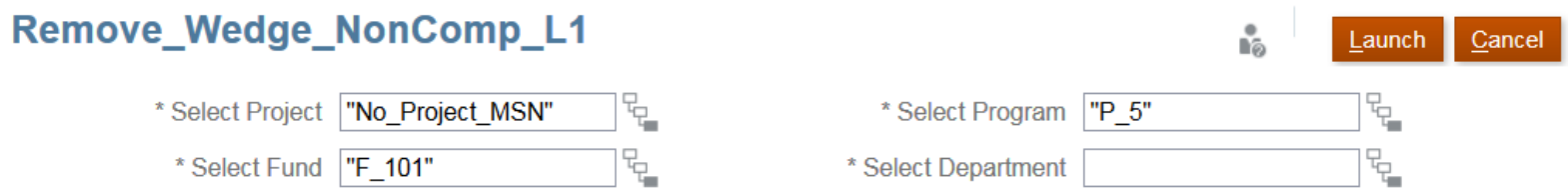
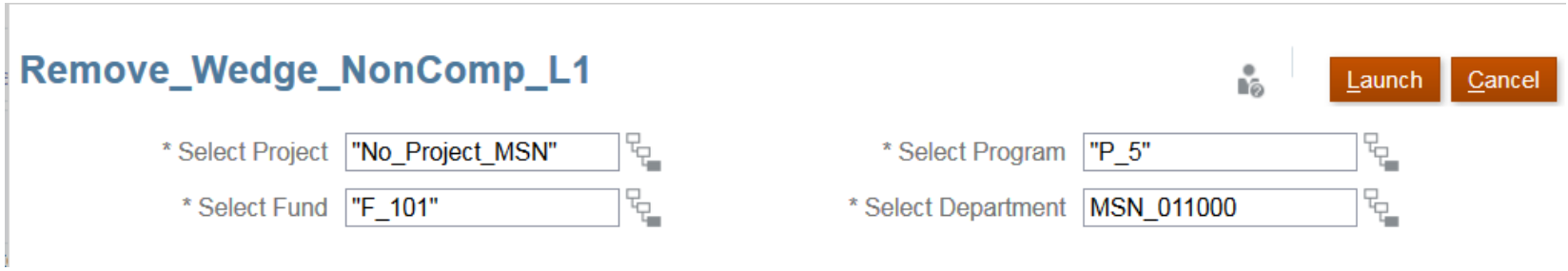
Non Comp Input Process – [L1] – Removing Open Budget Accounts

Under the Actions area, select **Remove Opened Budget Accounts.**

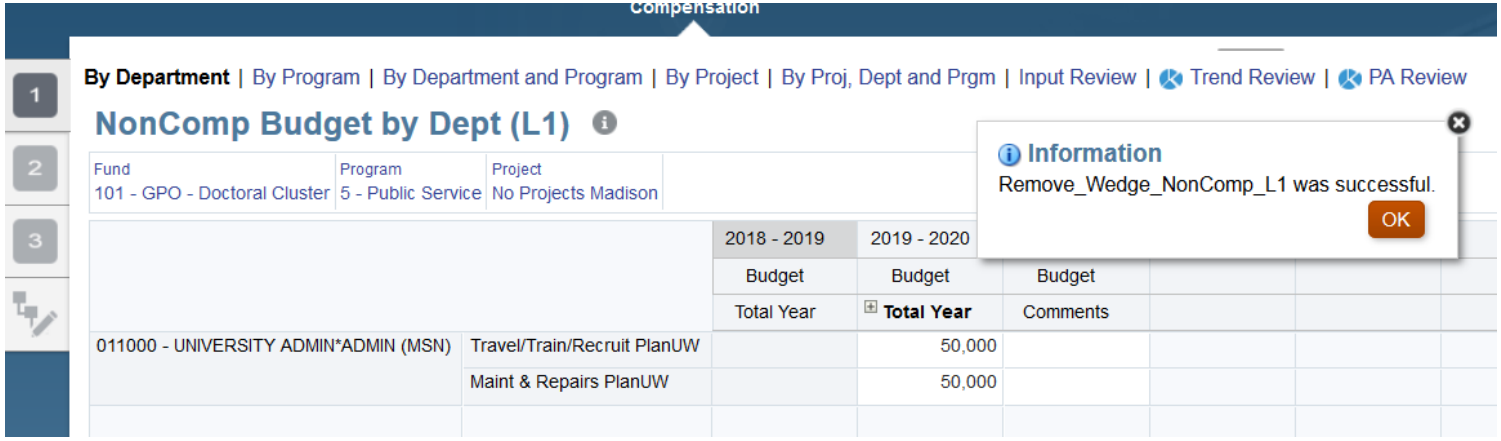
Non Comp Input Process – [L1] – Removing Open Budget Accounts

You will go through the same sequence that you did to add budget accounts by selecting the department and clicking “Launch”





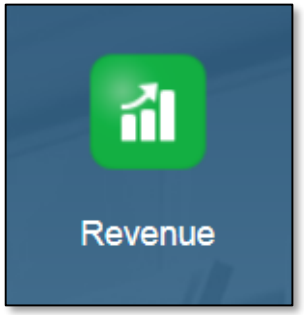
Result:



What areas are unclear or could use further explanation?

Are there any exercises you'd like to walk through as a group or individually?

Input Revenue Data



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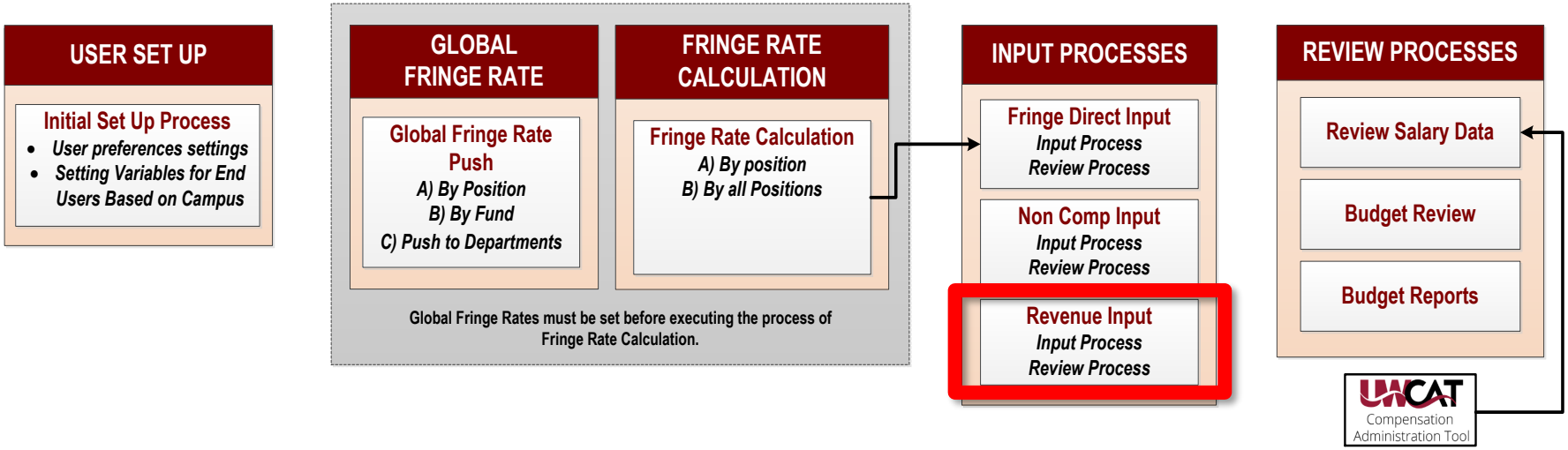
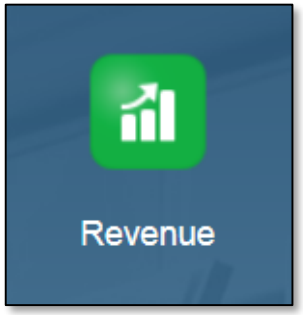
Input Revenue Data in Annual Budgeting Process



Revenue Input Process

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

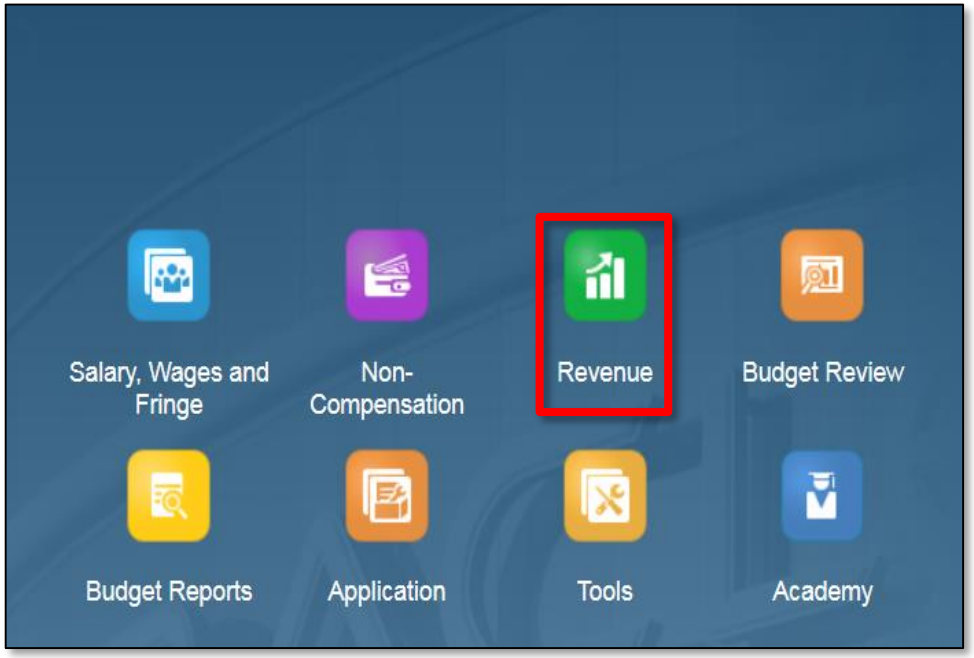
- This input process can take place at all three levels**, however we are only using Level 1 entry at UW-Madison for the FY20 budget process.**
- Input of budget data can take place in any of the following web forms:
  - By Department *
  - By Program
  - By Department & Program
  - By Project
  - By Proj, Dept, and Prgm
- This presentation will cover the Revenue Input process at Level 1 and will focus on exercises in the (*) items above.
- To enter in a project budget you need to use either the “By Project” or the “By Proj, Dept, and Prgm” web forms.



Revenue Input Process

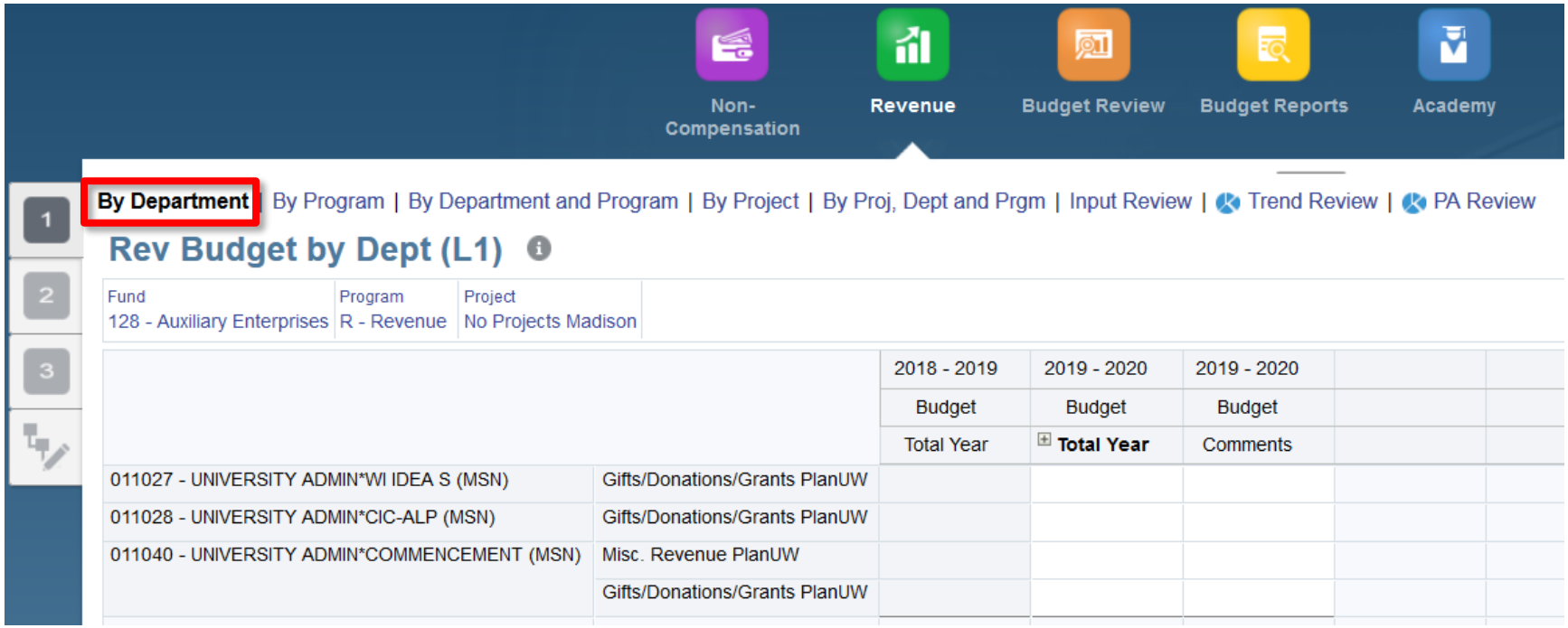
To begin the input process for Revenue:

1. Click the **Revenue** tile to open the spreadsheet.



Revenue – [L1] – By Department

For Revenue Inputs **By Department**, navigate to the **By Department form.** The form will automatically display data **By Department**. As in previous steps, select a Fund, Program, and Project that has prior year actual data.



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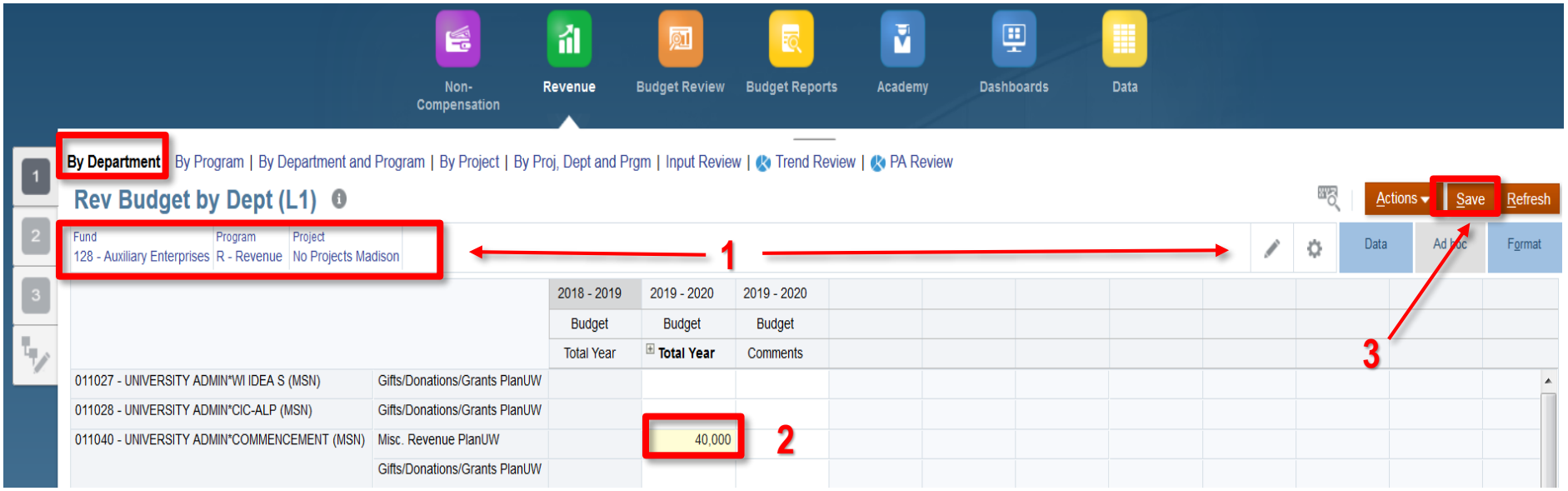
Revenue – [L1] – By Department

The process of budgeting Revenue By Department follows the same steps as you worked through in the Non-Compensation section.



1. Select the Department, Fund and Project combination you want to budget to using either the Point of View (POV) OR the Pencil.
2. Input budget data
3. Save Data

Reviewing Revenue Data

C 45

Revenue – Input Review and Trend Review

The review of Revenue data follows the same approach as Non Compensation.

The Input Review allows you to review and enter data. The Trend Review allows you to view data at different aggregation levels. You are not able to enter data in the Trend Review section.

Reviewing Revenue Data – Input Review

The Input Review form is a hybrid form that allows for review and data entry. This form allows you to see prior year actuals for specific Department – Fund – Program – Project combinations and enter data at the Level 1 budget accounts. You can adjust the POV to see different intersections and also enter in budget data in the level 1 accounts.

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

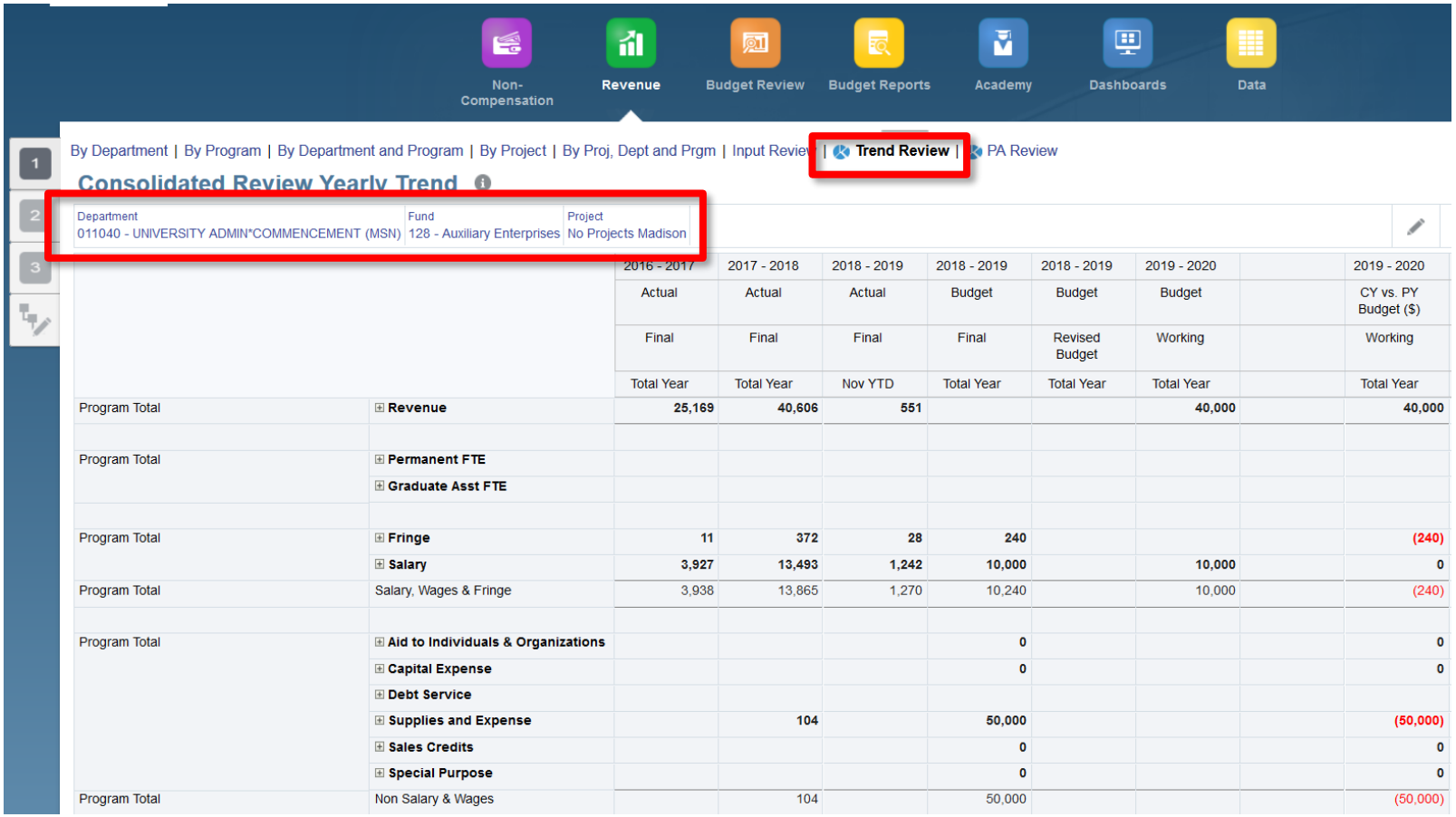
Rev Rollup Review (L1)

Department	Fund	Program	Project
011040 - UNIVERSITY ADMIN*COMMENCEMENT (MSN)	128 - Auxiliary Enterprises	R - Revenue	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
	Total Year	Total Year	Y-T-D(Nov)	Total Year	**Total Year**	Total Year	Comments
Continuing Ed Fees PlanUW							
Continuing Ed Fees							
Misc Fee PlanUW							
Misc Fee							
Student Union Fees PlanUW							
Student Union Fees							
Segregated Fees Other PlanUW							
Segregated Fees Other							
Student Svc & Act Fees PlanUW							
Student Services & Activity Fees							
9292 - Sem 1 - Seg Fees							
9294 - Sem 2 - Seg Fees							
9297 - Summer - Seg Fees							
9298 - Seg Fees Prior Year							
Segregated Fees							
Misc. Revenue PlanUW					40,000	40,000	
Misc. Revenue	**15,000**	**10,000**			**40,000**	**40,000**	
Other Transfers (Revenue) PlanUW							

Reviewing Revenue Data – Trend Review

The Trend Review in the Revenue section functions in the exact same manner as our review of this functionality in the Non Compensation section. You have the ability to review data (but not enter) by selecting your preferred Department – Fund – Project settings.



		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	Nov YTD	Total Year	Total Year	Total Year		Total Year
Program Total	Revenue	25,169	40,606	551			40,000		40,000
Program Total	Permanent FTE								
	Graduate Asst FTE								
Program Total	Fringe	11	372	28	240				(240)
	Salary	3,927	13,493	1,242	10,000		10,000		0
Program Total	Salary, Wages & Fringe	3,938	13,865	1,270	10,240		10,000		(240)
Program Total	Aid to Individuals & Organizations				0				0
	Capital Expense				0				0
	Debt Service								
	Supplies and Expense		104		50,000				(50,000)
	Sales Credits				0				0
	Special Purpose				0				0
Program Total	Non Salary & Wages		104		50,000				(50,000)

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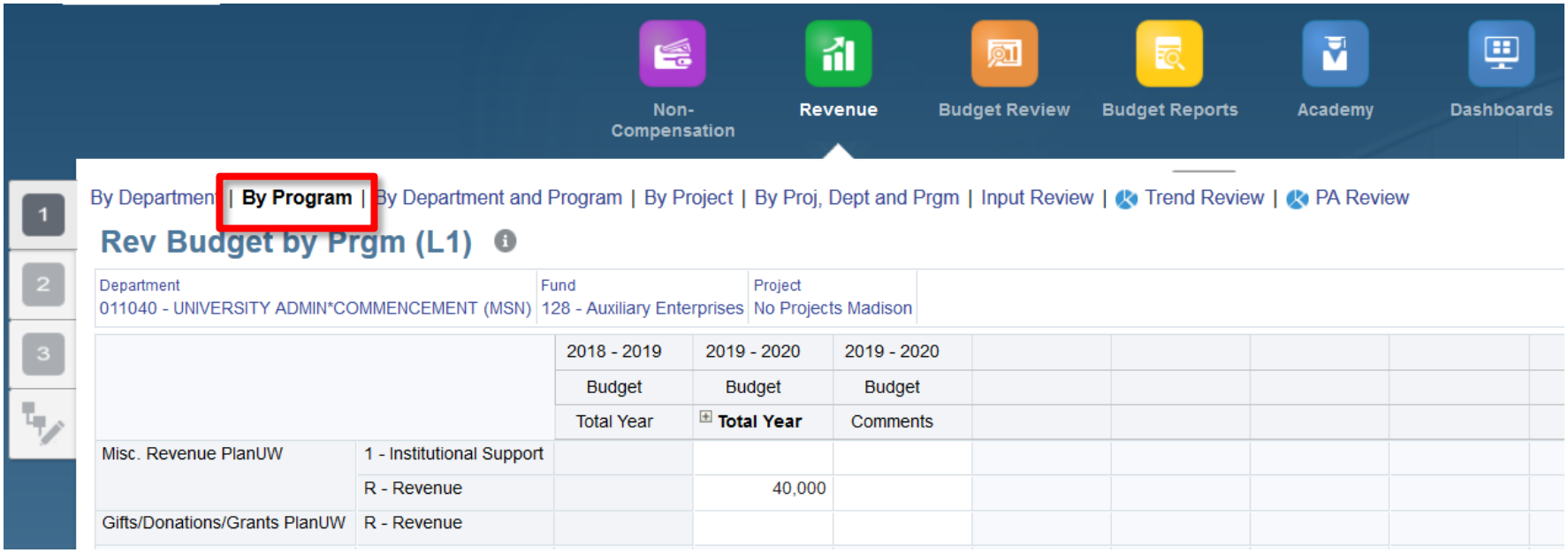
In class exercise:

Using the **By Department Revenue** form enter and save budget data for a (or multiple) intersections in your division. Use figures that are easy to remember/add.

Walk through the **Input Review** and **Trend Review** forms and find the data in each.

Revenue Input Process – [L1] – By Program

For Revenue Inputs **By Program**, navigate to the **By Program Form.** In this form Program is moved from the POV into a the form and Department is moved from the form into the POV.



Note that the entries from the previous example "By Department" are showing here. Data entries that are made inside of the same intersection (Department, Fund, Program, Project) will show up inside of that same intersection inside of any of the data entry web forms.

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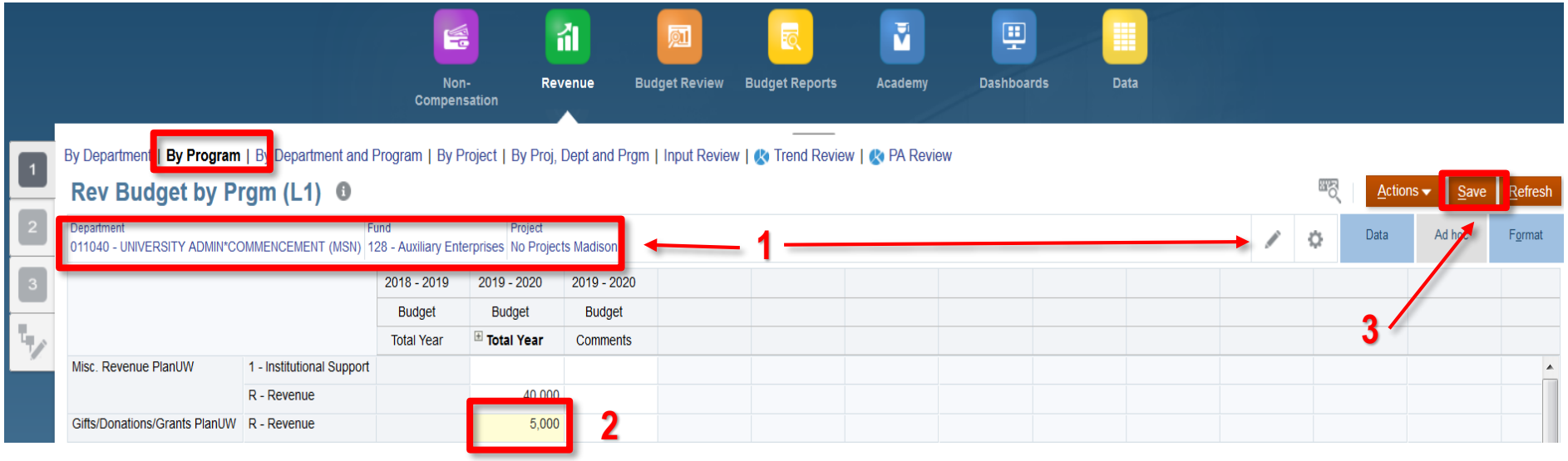
Revenue Input Process – [L1] – By Program

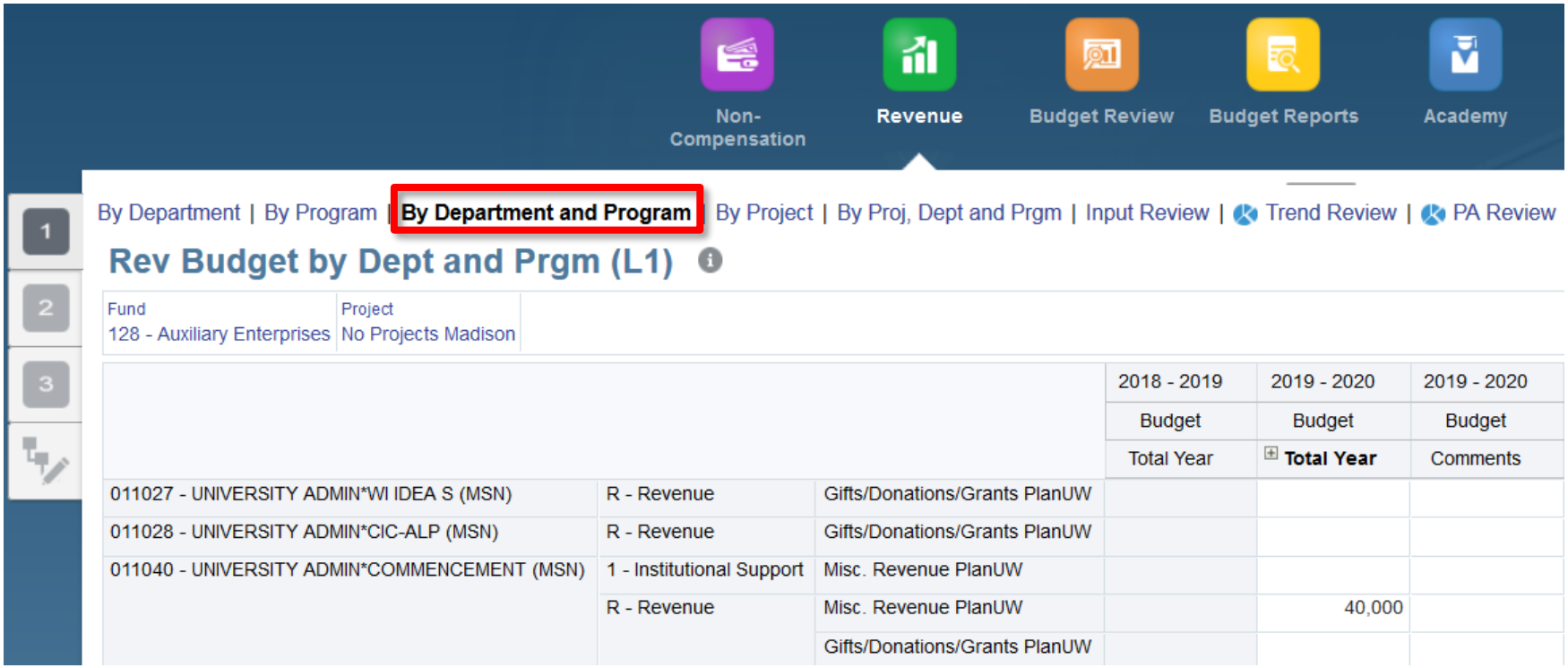
Other than the move of Program to the form and Department to the POV the process of budgeting By Program follows the same steps as the budgeting by Department form.



1. Select the Department, Fund and Project combination you want to budget to using either the Point of View (POV) OR the Pencil.
2. Input budget data
3. Save Data

Revenue Input Process – [L1] – By Department & Program

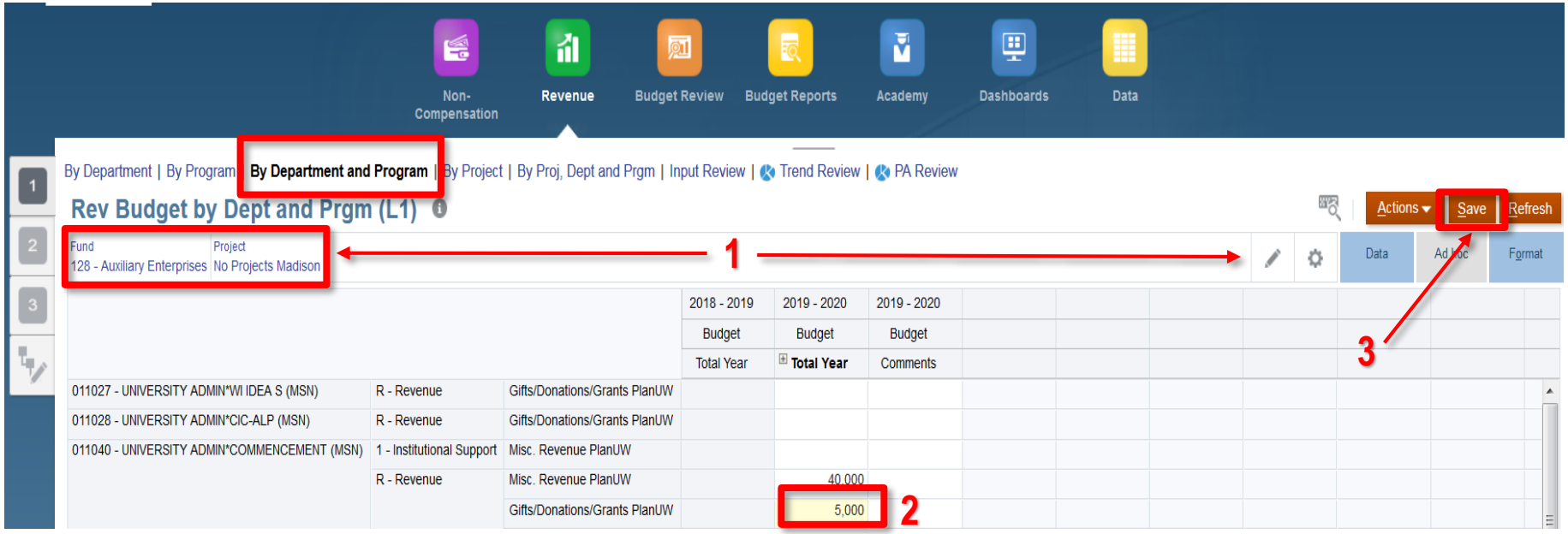
For Revenue Inputs **By Department and Program**, navigate to the **By Department and Program Form.** This brings Department and Program from the POV into the form. This form minimizes POV selections and moves to a scroll down approach.



C 44

Revenue Input Process – [L1] – By Department & Program

Other than the move of Department and Program to the form the process of budgeting "By Department and Program" follows the same steps as the previous forms.

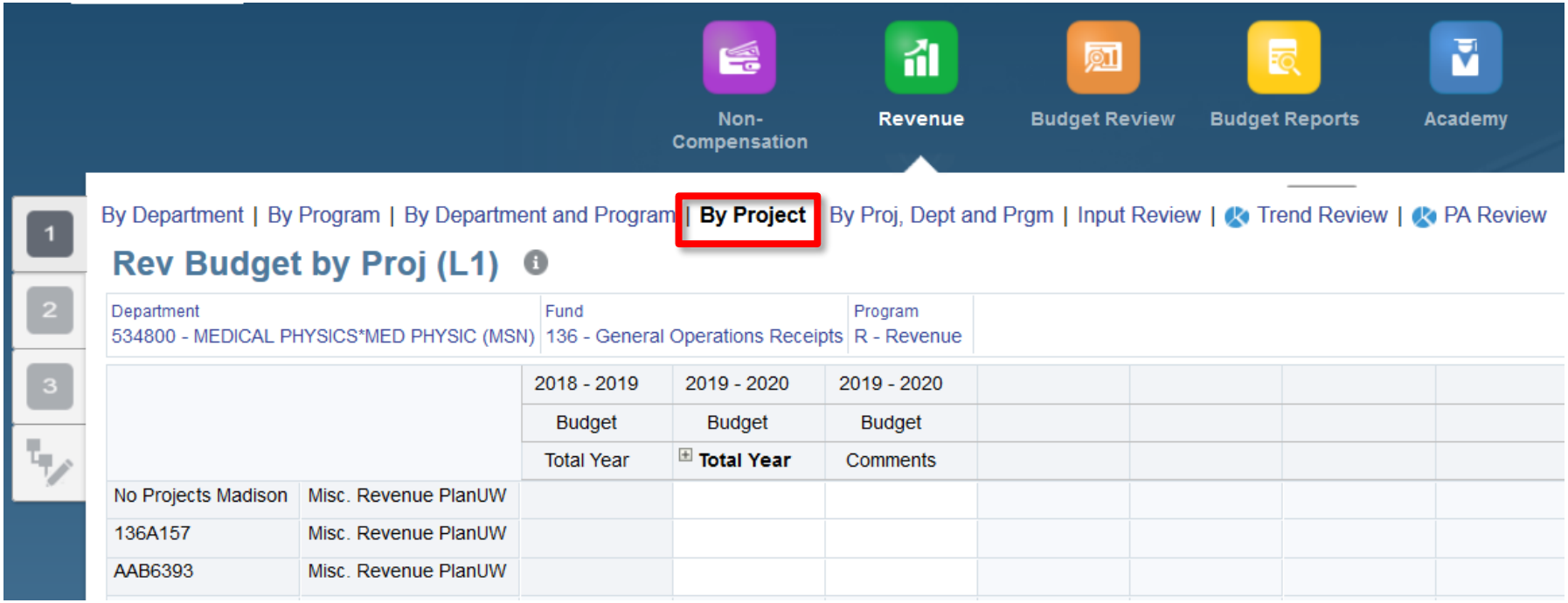


1. Select the Department, Fund and Project combination you want to budget to using either the Point of View (POV) OR the Pencil.
2. Input budget data
3. Save Data

Revenue Input Process – [L1] – By Project

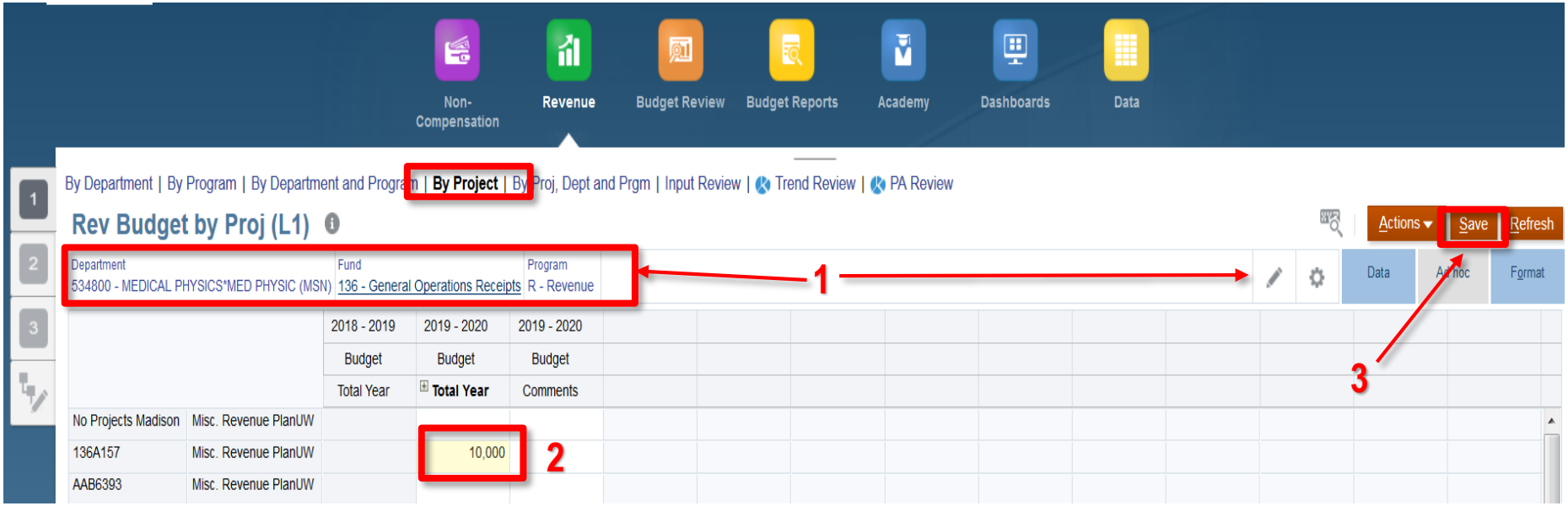
For Revenue Inputs **By Project**, navigate to the **By Project form.** This brings Project into the form and out of the POV. As a reminder only projects that have been loaded to PlanUW will be available for budgeting. If you would like a project added please send a request with the project ID to PlanUW-MSN-MBO@vc.wisc.edu.

"No Projects Madison" is where data that is not associated with a project inside of PlanUW is tied to. This grouping would include any historical actuals that are (a) not on a project or (b) on a project that is not loaded to PlanUW.



Non Comp Input Process – [L1] – By Project

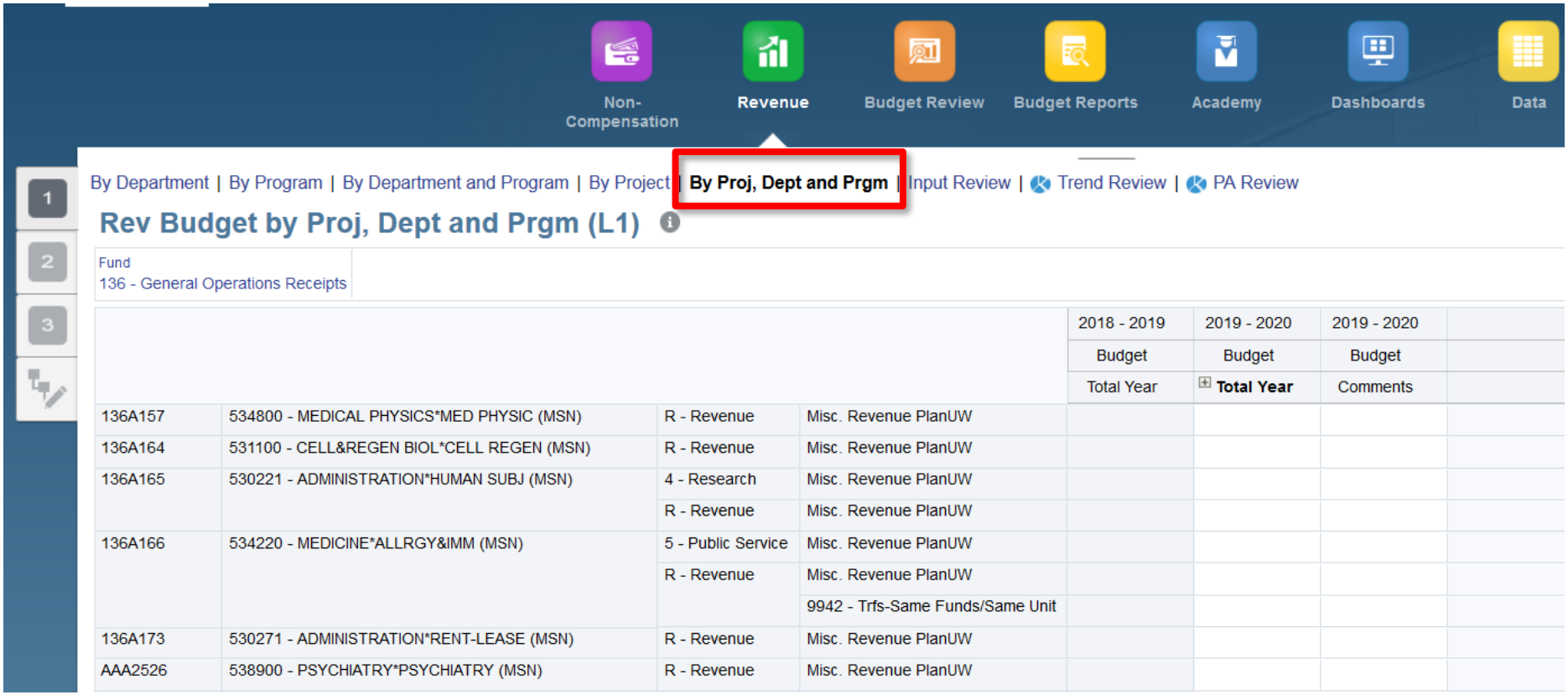
Other than the move of Project to the form the process of budgeting "By Project" follows the same steps as the previous forms.



1. Select the Department, Fund and Program combination you want to budget to using either the Point of View (POV) OR the Pencil.
2. Input budget data
3. Save Data

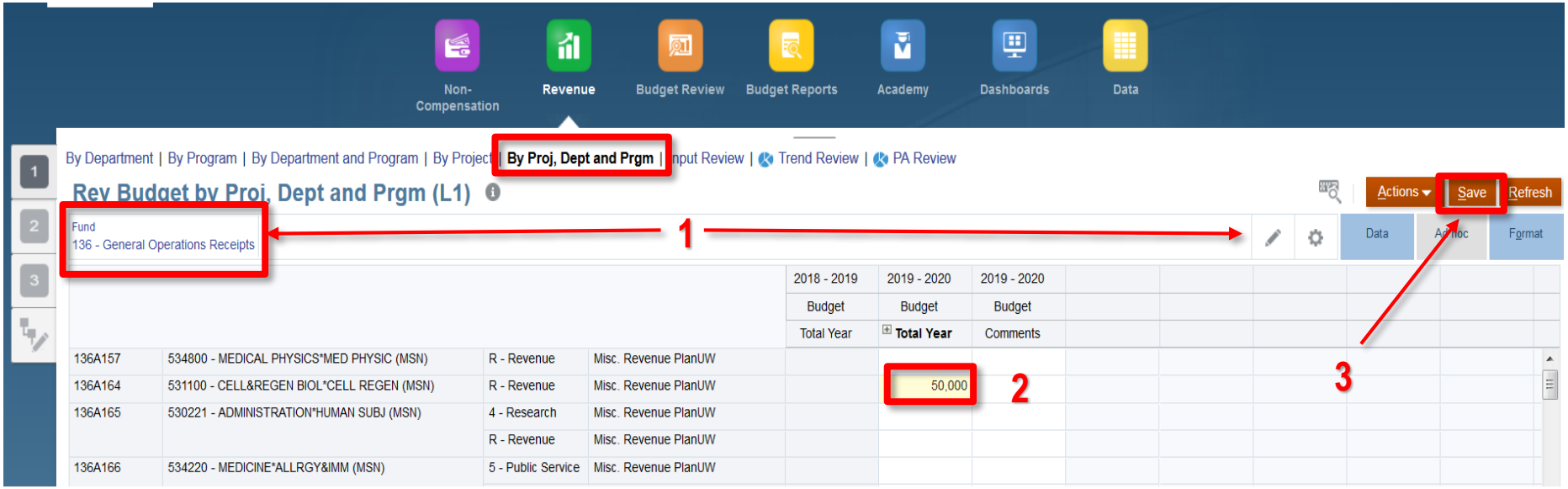
Revenue Input Process – [L1] – By Proj, Dept and Prgm

For Revenue Inputs **By Proj, Dept**, and Prgm navigate to the **By Proj, Dept and Prgm Form.** This form brings Project, Department and Program from the POV into the form. This form minimizes POV selections and moves to a scroll through approach.



Revenue Input Process – [L1] – By Proj, Dept and Prgm

The process of budgeting “By Pror, Dept, and Prgm” follows the same steps as the previous forms.



1. Select the Fund you want to budget to using either the Point of View (POV) OR the Pencil.
2. Input budget data
3. Save Data

In class exercise:

Choose any of the entry form types (other than By Department) and walk through an entry (entries).

Confirm the data inside of the **Input Review** and **Trend Review** forms.

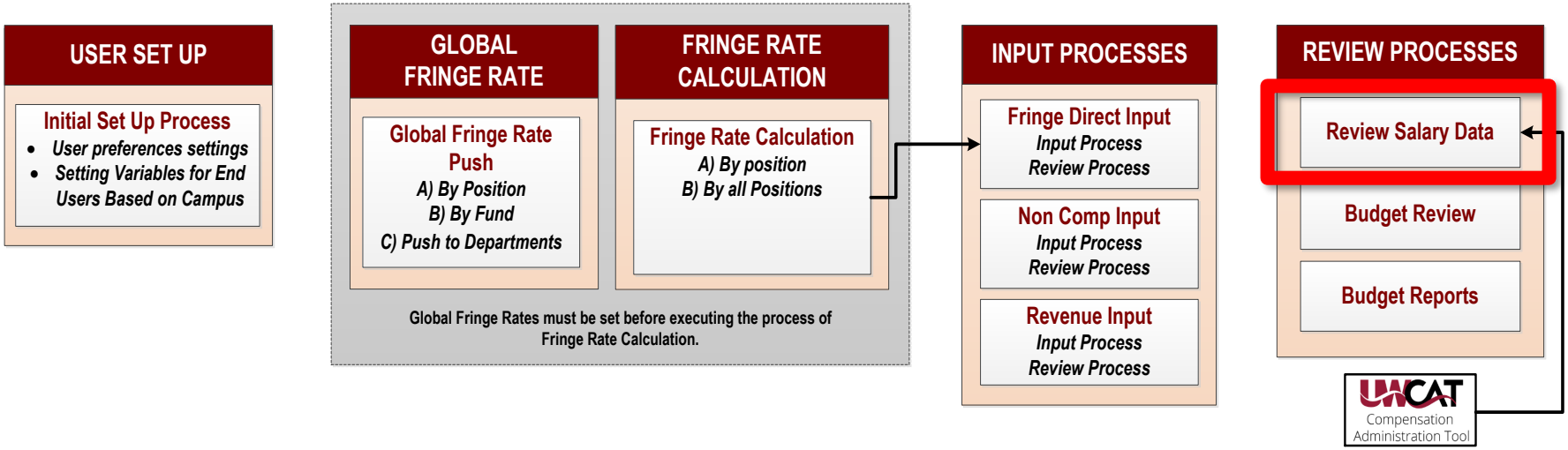
Please ask for help if needed.

Knowledge Check – Revenue

Salary & Wage Review

C 9

Reviewing Salary Data in Annual Budgeting Process



Review Salary Data

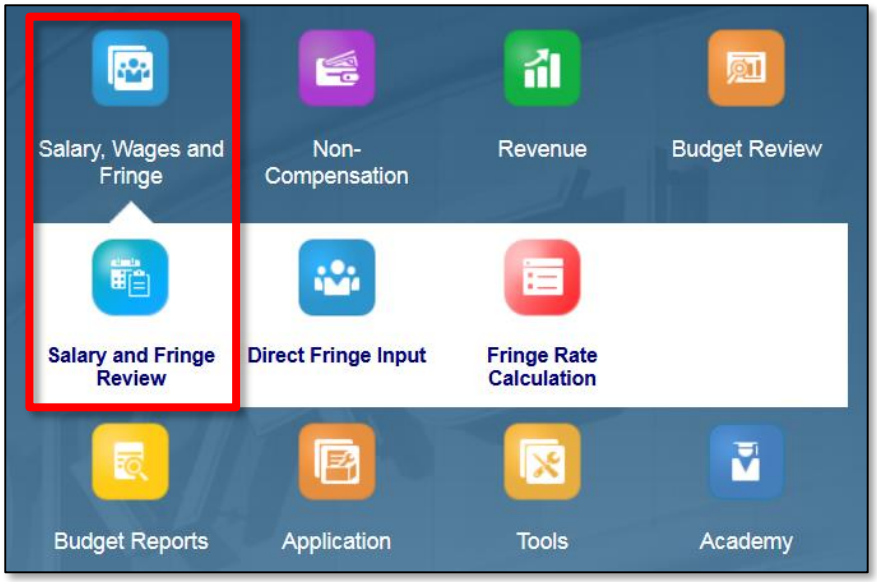
To begin the salary data review process:

1. Click the **Salary, Wages and Fringe** tile to open the cluster
2. Click on the **Salary and Fringe Review** to open the form.

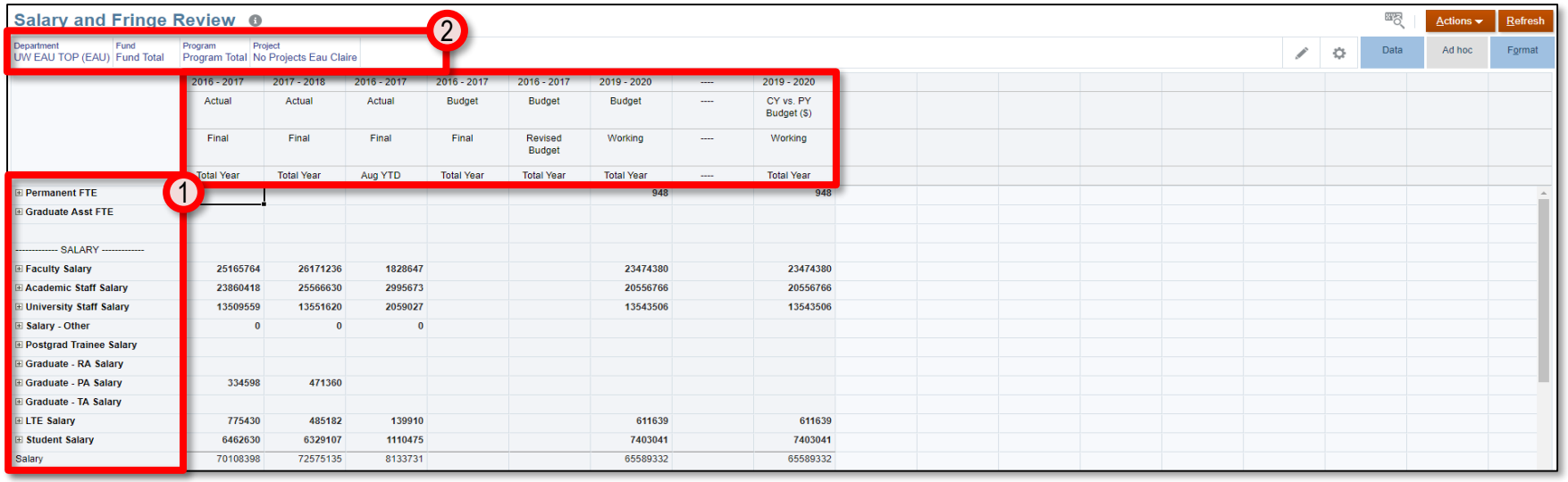
This process will open the Review Salary Data form.

Before starting, remember that all salary data in PlanUW is for review only. If this information needs to be changed, it needs to take place directly in CAT.

UWCAT Compensation Administration Tool



Review Salary Data



Salary and Fringe Review

Actions | Refresh

Department: UW EAU TOP (EAU) | Fund: Fund Total | Program: Program Total | Project: 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	70108398	72575135	8133731			65589332		65589332

Since this is only a review form, the cells should be grey and you should not be able to input data.

1. When the form opens, this is a good opportunity to ensure that the columns contain the information needed.
2. The Point of View section can be changed to the **Department Total**, **Fund Total, Program Total**, and **No Project** member for your institution.

NOTE: The cells should be gray since no input should be available in a review form.

Review Salary Data

Start by selecting a department where data is available for review (Insert dept) to complete the steps described in the previous slide. Also, and for practices purpose, continue to select a department where data is not available (Insert dept). This will demonstrated how the form appears without data.

Salary and Fringe Review

Department	Fund	Program	Project
024010 - BUSINESS SERV-ACCOUNTING (EAU)	Fund Total	Program Total	No Projects Eau Claire

	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						2		2
Graduate Asst FTE								
---------- SALARY ----------								
Faculty Salary								
Academic Staff Salary	195396	164055	38559			148932		148932
University Staff Salary	1089	8588						
Salary - Other								
Postgrad Trainee Salary								
Graduate - RA Salary								
Graduate - PA Salary								
Graduate - TA Salary								
LTE Salary								
Student Salary	4416	3503	478					
Salary	200901	176145	39037			148932		148932

(Insert dept) – Contains Data

Salary and Fringe Review

Department	Fund	Program	Project
024011 - NON-APPROPRIATED REVENUES (EAU)	Fund Total	Program Total	No Projects Eau Claire

	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								
Graduate Asst FTE								
---------- SALARY ----------								
Faculty Salary								
Academic Staff Salary								
University Staff Salary								
Salary - Other								
Postgrad Trainee Salary								
Graduate - RA Salary								
Graduate - PA Salary								
Graduate - TA Salary								
LTE Salary								

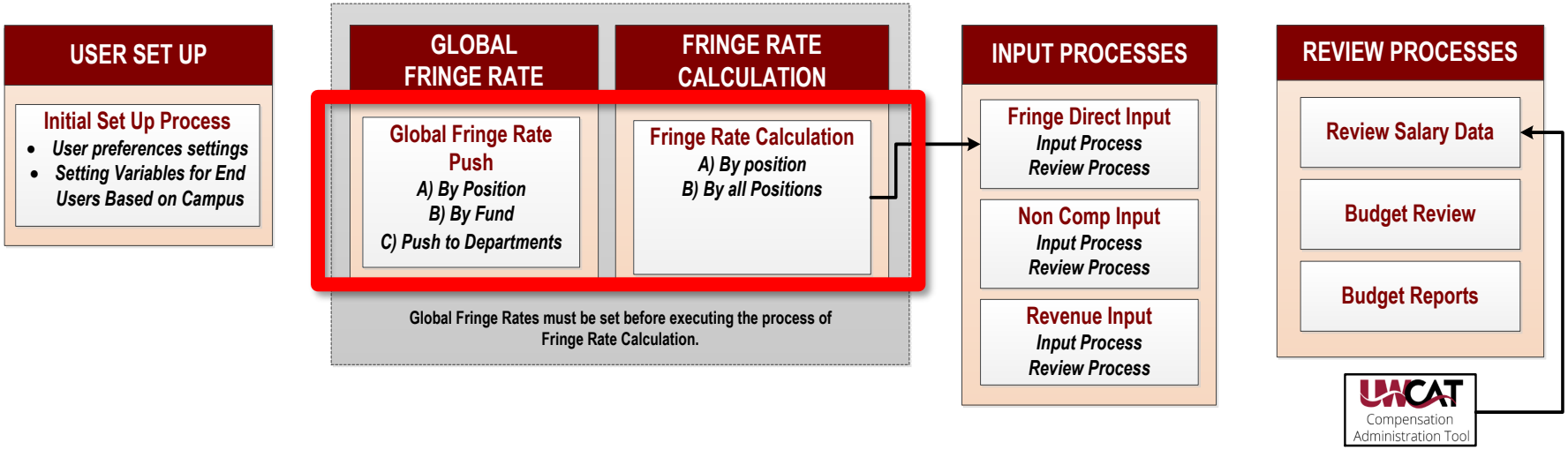
(Insert dept) – Does Not Contain Data

Knowledge Check – Salary Review

Input Fringe Rates

C 11

Input Fringe Rates in Annual Budgeting Process



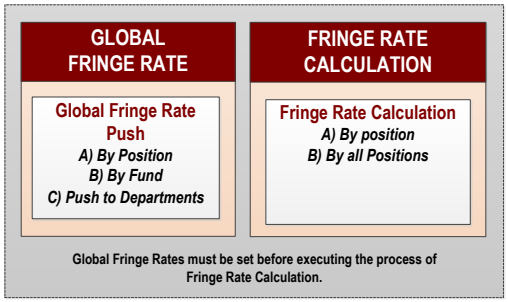
Before We Start This Process

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

- Campuses in the **WEST, SO**, and **NE** regions need to set user variables. *This excludes the Madison and Milwaukee campuses*.
- Power and ADMIN Users need to **set and push Global Fringe Rates** before starting the input process.

  Once Global Fringe Rates have set, the user can continue to Calculate Fringe by Rate AND/OR continue to Input Fringe Directly.

- 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.*



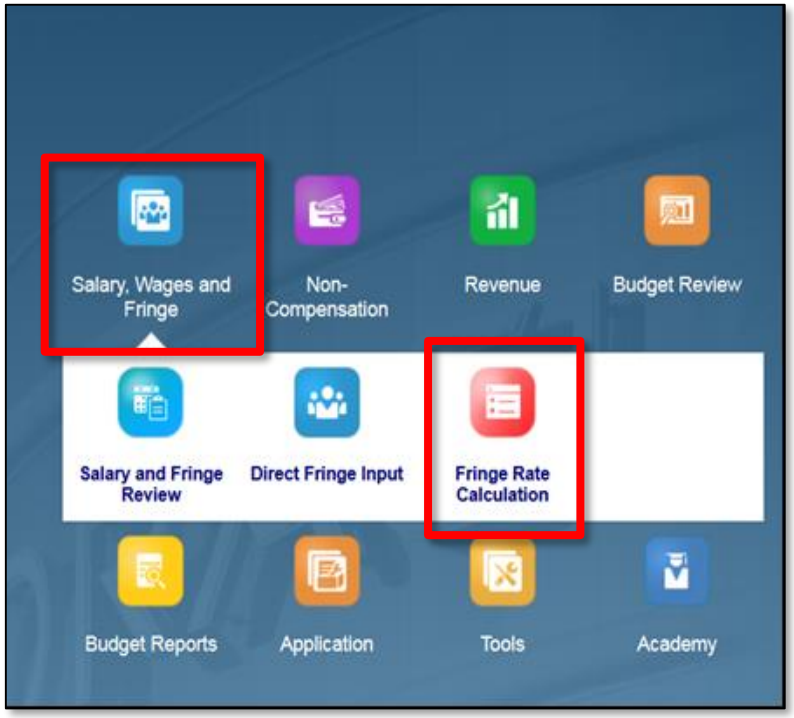
Input Fringe Rates

The Input Fringe rates process differs between **two groups**.

- Due to campus size, the first group is comprised of the **Madison and Milwaukee** campuses
- The second group contains the **rest of the campuses**. <u>These campuses will have to set their User Variables before beginning.</u>

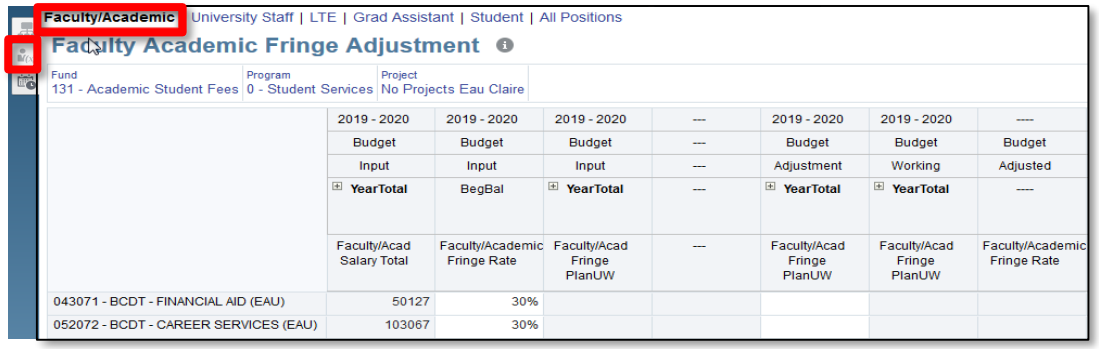
To begin the process of fringe rates input:

1. Click the **Salary, Wages and Fringe** cluster to open the drop down,
2. Click on **the Fringe Rate Calculation** tile to open the page.



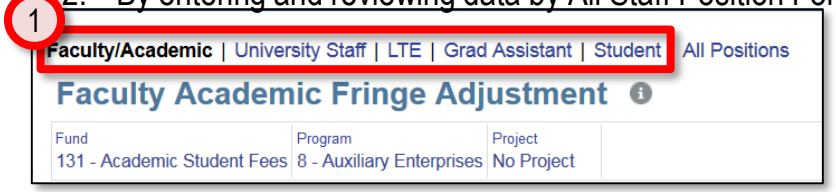
Calculate Fringe Using Rates

Navigate to the second vertical tab - "**Fringe Rate Adj and Review**" and open the **Faculty/Academic Fringe Adjustment Form**.



To continue, you can input fringe rates using two options:

1. By entering and reviewing data by Individual Staff Position Form (We are using this option moving forward as an example)
2. By entering and reviewing data by All Staff Position Form.



Fringe Calculation Nightly Automated Process

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

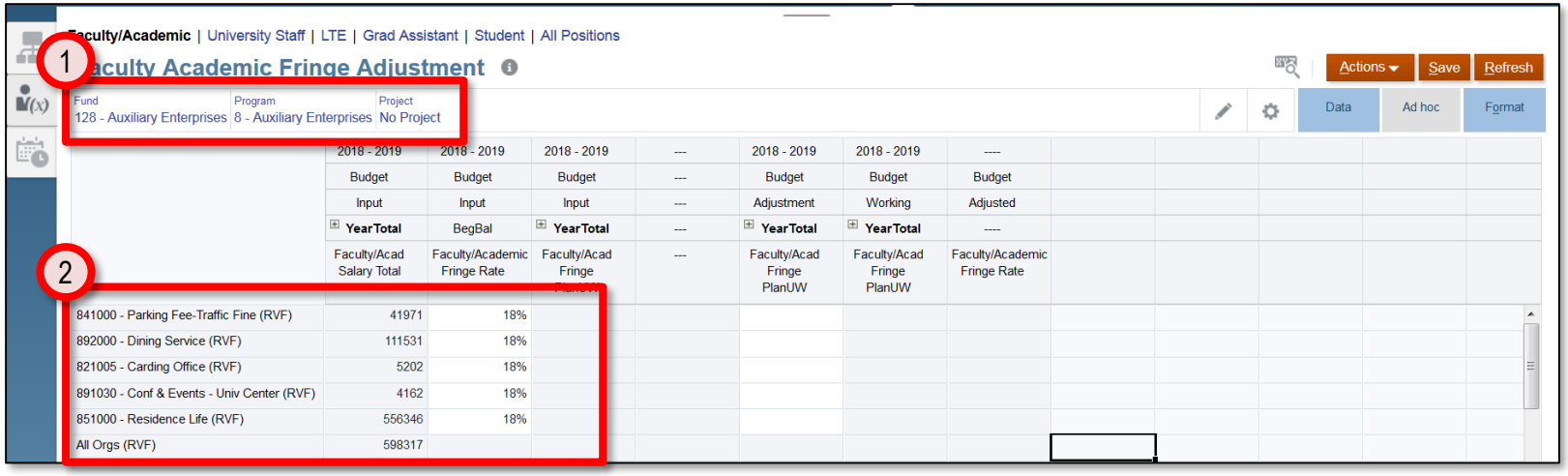
	2019 - 2020	2019 - 2020	2019 - 2020	---	2019 - 2020	2019 - 2020	----
	Budget	Budget	Budget	---	Budget	Budget	Budget
	Input	Input	Input	---	Adjustment	Working	Adjusted
	⊞ **YearTotal**	BegBal	⊞ **YearTotal**	---	⊞ **YearTotal**	⊞ **YearTotal**	----
	Faculty/Acad Salary Total	Faculty/Academic Fringe Rate	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%					

The process of Fringe Calculation is an **automated nightly process**. It is very possible that users will not be able to see updated Fringe Rate data calculated until the automated process happens that night.

Calculate Fringe Using Rates

To **validate** rates:

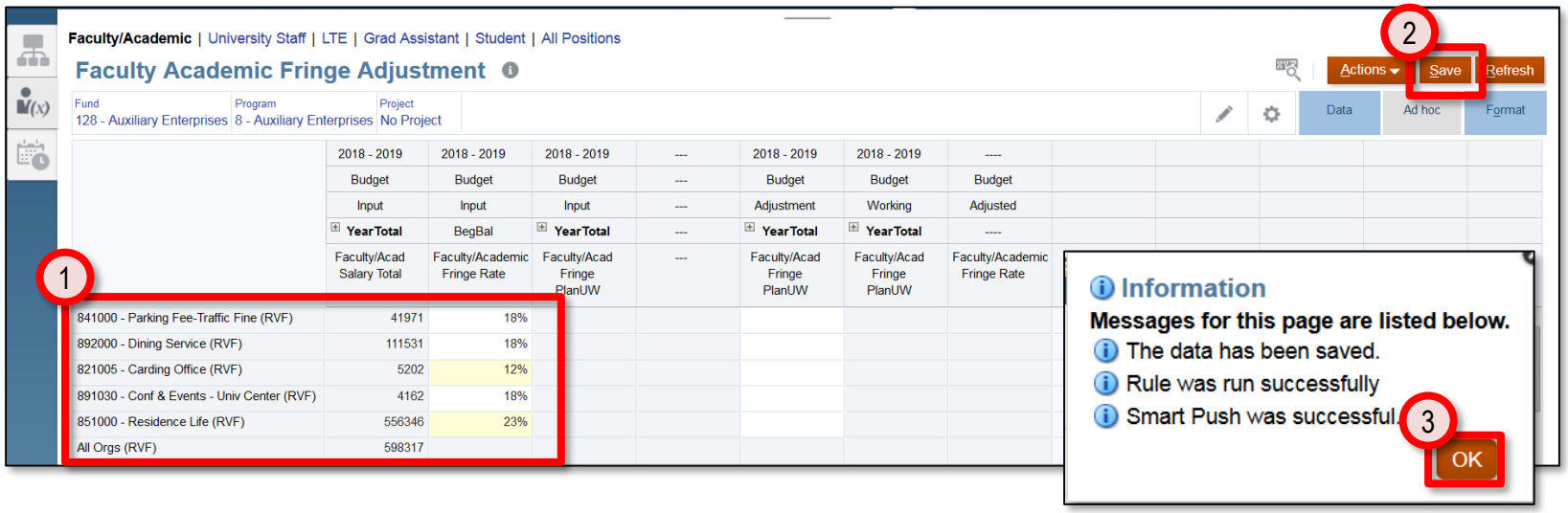
1. Enter the desired Fund, Program, and Project
2. Once displayed, this is a good opportunity to ensure that the Point of View information is correct (*the rates are correct at this fund, program, and project level.)*



Calculate Fringe Using Rates

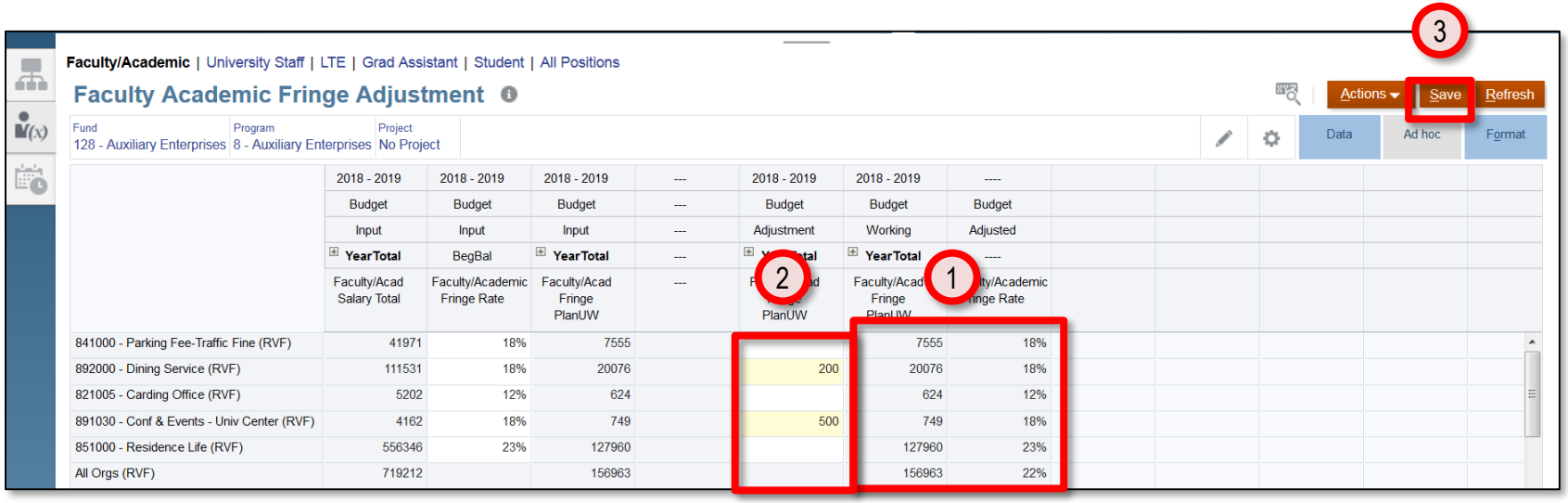
To **adjust** rates Fringe rates by Department:

1. Enter the rate in the appropriate department by using decimal points for percentage (Example: .18 = 18%)
2. Once all rates have been entered, click Save.
3. Click OK on the pop-up confirmation of the changes made.



Calculate Fringe Using Rates

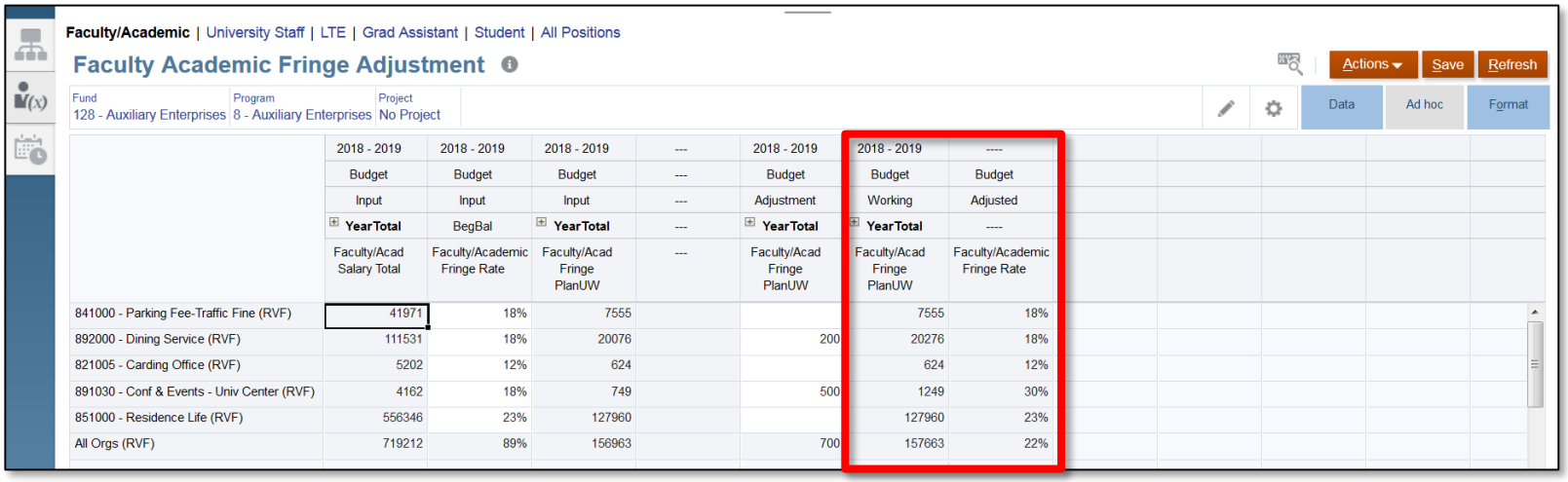
1. Verify that the fringe rates saved in the previous step are correct.
2. If adjustments are needed, enter them in the **Adjustment** column. This adjustment will be added to the calculated total. If you are planning to use an adjustment on top of the fringe rate calculation you may want to consider changing the rate to 0% and then using
3. Click Save



	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	---	[illegible]	YearTotal	----
	Faculty/Acad Salary Total	Faculty/Academic Fringe Rate	Faculty/Acad Fringe PlanUW	---	[illegible] PlanUW	Faculty/Acad Fringe PlanUW	[illegible]ty/Academic [illegible]inge Rate
841000 - Parking Fee-Traffic Fine (RVF)	41971	18%	7555			7555	18%
892000 - Dining Service (RVF)	111531	18%	20076		200	20076	18%
821005 - Carding Office (RVF)	5202	12%	624			624	12%
891030 - Conf & Events - Univ Center (RVF)	4162	18%	749		500	749	18%
851000 - Residence Life (RVF)	556346	23%	127960			127960	23%
All Orgs (RVF)	719212		156963			156963	22%

Calculate Fringe Using Rates

If whole number adjustment was required, confirm/validate the Position Fringe amounts, and Adjusted Fringe Rates are correct.



Faculty/Academic | University Staff | LTE | Grad Assistant | Student | All Positions

Faculty Academic Fringe Adjustment

Actions | Save | Refresh

Fund: 128 - Auxiliary Enterprises | Program: 8 - Auxiliary Enterprises | Project: No Project

Data | Ad hoc | Format

	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%	7555			7555	18%
892000 - Dining Service (RVF)	111531	18%	20076		200	20276	18%
821005 - Carding Office (RVF)	5202	12%	624			624	12%
891030 - Conf & Events - Univ Center (RVF)	4162	18%	749		500	1249	30%
851000 - Residence Life (RVF)	556346	23%	127960			127960	23%
All Orgs (RVF)	719212	89%	156963		700	157663	22%

Calculate Fringe Using Rates Review

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Calculate Fringe Using Rates - Review

To conduct a review of the calculation of fringe using rates:

Go to the third vertical tab "**Consolidated Review**".

Choose a Department, Fund, Project to review. This can be done at rollups such as a Division or all Aux funds, or more granularly at sub departments and the 3 digit fund codes.

Validate the aggregated Fringe amounts you calculated are correct, and other data as applicable.

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
	Graduate Asst FTE								
Program Total	Salary	5,352,640	5,307,325	1,455,433	3,622,150	3,622,150	3,109,782		(512,368)
	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	3,146,433		(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)

Fringe Rate Adjustment – Exercise

<u>In class exercise:</u>

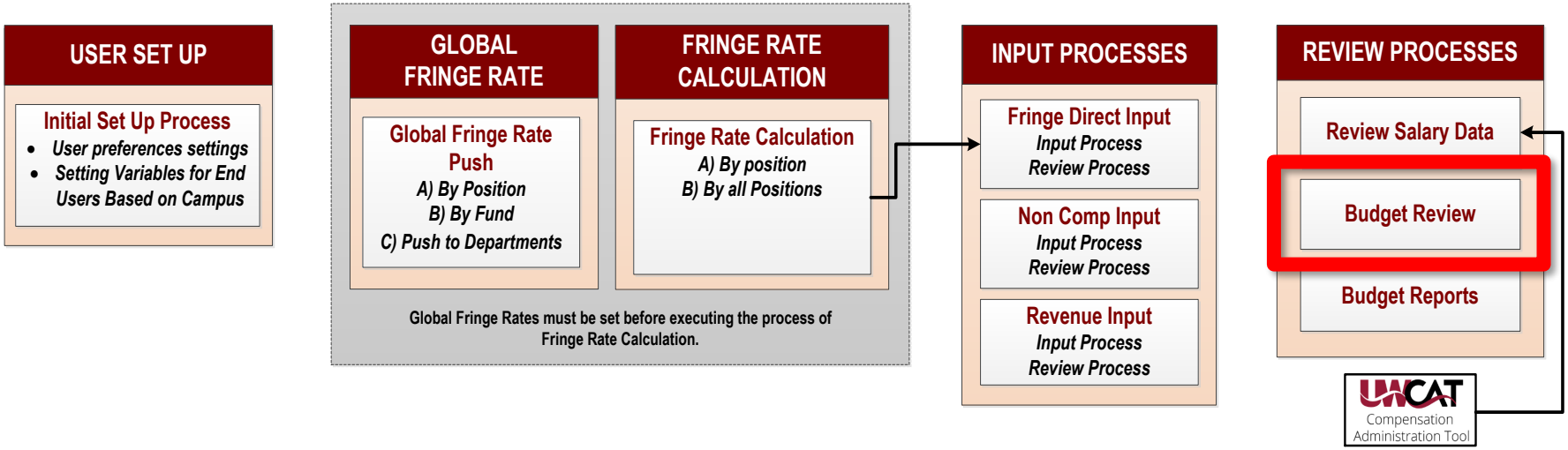
Practice adjusting a fringe rate for a Fund – Program – Project (if applicable) combination.

Practice making an adjustment to the dollar amount of the calculation.

Budget Review

C 47

Budget Review in Annual Budgeting Process



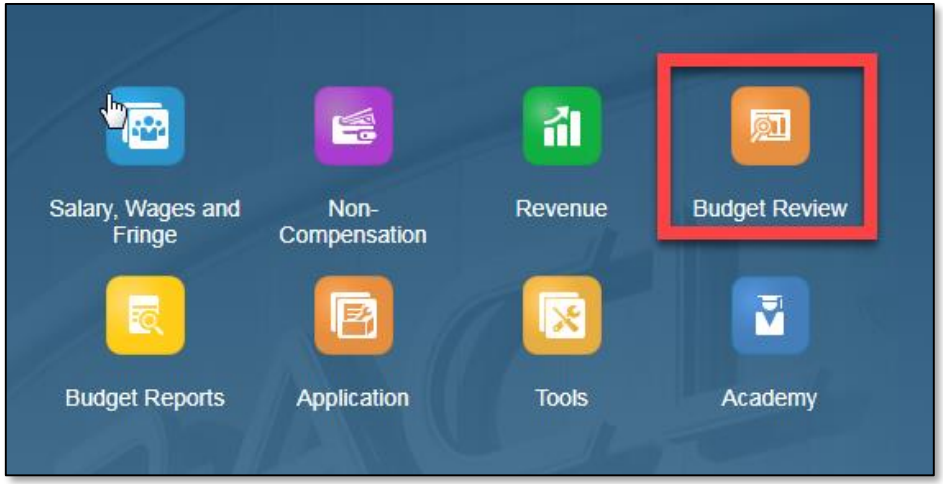
Budget Review – Before We Begin

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

- ✓ Trend Reviews
- ✓ PA Reviews
- ✓ Review by Fund
- ✓ Fringe Budget by Departments
- ✓ How to Modify Data in Input Forms
- ✓ How to View Variances

Budget Review

All budget review processes will begin at the **Budget Review** tile.



Budget Review– Trend Review

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

Trend Review | PA Review | Review by Fund

Consolidated Review Yearly Trend

Department	Fund	Project
06 - INFORMATION TECHNOLOGY (MSN)	Fund Total	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
	Graduate Asst FTE						
Program Total	**Salary**	45,139,016	46,528,314	7,497,962	49,459,579	49,459,579	49,459,579
	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
	Capital Expense	4,113,701	4,747,922	211,753	7,472,000	7,472,000	
	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.

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Budget Review– Trend Review

Consolidated Review Yearly Trend

Department	Fund	Project
UW OSH ALL_ORGS (OSH)	GPR/Tuition	No Projects Oshkosh

		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	42,612	101,373,948	9,490					
Program Total	Permanent FTE						845		845
	Graduate Asst FTE								
Program Total	Salary	55,654,696	54,946,930	5,012,717	53,860,045	53,860,045	51,695,894		(2,164,151)
	Fringe	23,981,409	23,331,048	4,174,038	25,846,222	25,846,222			(25,846,222)
Program Total	Salary, Wages & Fringe	79,636,105	78,277,978	9,186,755	79,706,267	79,706,267	51,695,894		(28,010,373)
Program Total	Supplies and Expense	11,328,140	9,940,097	1,351,209	11,131,364	11,131,364			(11,131,364)
	Capital Expense	1,250,242	1,001,232	170,932	1,319,193	1,319,193			(1,319,193)
	Aid to Individuals & Organizations	2,442,383	3,524,019	48,852	802,267	802,267			(802,267)
	Special Purpose				11,805,595	11,805,595			(11,805,595)
	Debt Service	12,243,364	10,595,270						
	Sales Credits	(2,021,081)	(1,964,648)	(283,961)	(1,678,298)	(1,678,298)			1,678,298
Program Total	Non Salary & Wages	25,243,048	23,095,970	1,287,032	23,380,121	23,380,121			(23,380,121)

1. View the Actual data
2. View the current fiscal year's Redbook Budget

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, this budget will exist at whatever level was used to budget in the prior year in PlanUW

Budget Review– Trend Review

Consolidated Review Yearly Trend

Department	Fund	Project
UW OSH ALL_ORGS (OSH)	GPR/Tuition	No Projects Oshkosh

		2016 - 2017	2017 - 2018	2018 - 2019	2018 - 2019	2018 - 2019 (3)	2019 - 2020 (4)		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	42,612	101,373,948	9,490					
Program Total	Permanent FTE						845		845
	Graduate Asst FTE								
Program Total	Salary	55,654,696	54,946,930	5,012,717	53,860,045	53,860,045	51,695,894		(2,164,151)
	Fringe	23,981,409	23,331,048	4,174,038	25,846,222	25,846,222			(25,846,222)
Program Total	Salary, Wages & Fringe	79,636,105	78,277,978	9,186,755	79,706,267	79,706,267	51,695,894		(28,010,373)
Program Total	Supplies and Expense	11,328,140	9,940,097	1,351,209	11,131,364	11,131,364			(11,131,364)
	Capital Expense	1,250,242	1,001,232	170,932	1,319,193	1,319,193			(1,319,193)
	Aid to Individuals & Organizations	2,442,383	3,524,019	48,852	802,267	802,267			(802,267)
	Special Purpose				11,805,595	11,805,595			(11,805,595)
	Debt Service	12,243,364	10,595,270						
	Sales Credits	(2,021,081)	(1,964,648)	(283,961)	(1,678,298)	(1,678,298)			1,678,298
Program Total	Non Salary & Wages	25,243,048	23,095,970	1,287,032	23,380,121	23,380,121			(23,380,121)

3. View the current fiscal year's Revised Budget.

The Revised Budget will be the Redbook Budget (or budget developed in PlanUW going forward) + or - the Budget transfers loaded from SFS.

4. Validate the budget from previous inputs.

Budget Review– Trend Review

Review the Working vs. Redbook Budget Variance is calculated correctly

Consolidated Review Yearly Trend

Department	Fund	Project
UW OSH ALL_ORGS (OSH)	GPR/Tuition	No Projects Oshkosh

		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	42,612	101,373,948	9,490				
Program Total	Permanent FTE						845	845
	Graduate Asst FTE							
Program Total	Salary	55,654,696	54,946,930	5,012,717	53,860,045	53,860,04	51,695,894	(2,164,151)
	Fringe	23,981,409	23,331,048	4,174,038	25,846,222	25,846,22		(25,846,222)
Program Total	Salary, Wages & Fringe	79,636,105	78,277,978	9,186,755	79,706,267	79,706,26	51,695,894	(28,010,373)
Program Total	Supplies and Expense	11,328,140	9,940,097	1,351,209	11,131,364	11,131,36		(11,131,364)
	Capital Expense	1,250,242	1,001,232	170,932	1,319,193	1,319,19		(1,319,193)
	Aid to Individuals & Organizations	2,442,383	3,524,019	48,852	802,267	802,26		(802,267)
	Special Purpose				11,805,595	11,805,59		(11,805,595)
	Debt Service	12,243,364	10,595,270					
	Sales Credits	(2,021,081)	(1,964,648)	(283,961)	(1,678,298)	(1,678,298		1,678,298
Program Total	Non Salary & Wages	25,243,048	23,095,970	1,287,032	23,380,121	23,380,12		(23,380,121)

Budget Review – PA Review

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

Trend Review | PA Review | Review by Fund

Years: 2019 - 2020 | Total Year | Department: 53 - MEDICAL SCHOOL (MSN) | Fund: GPR/Tuition | Project: Project Total

PA Review By Account

	Budget	PA - Budget Allocation	Allocation Target vs Budget ($)
	Working	Final	Working
	Program Total	No Program	No Program
Permanent FTE	656.106315	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			
Debt Service			
Sales Credits			
Non Salary & Wages	1,586,189	4,116,537	(2,530,348)
Expenses	60,250,065	59,652,129	597,936

PA Review By Program

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

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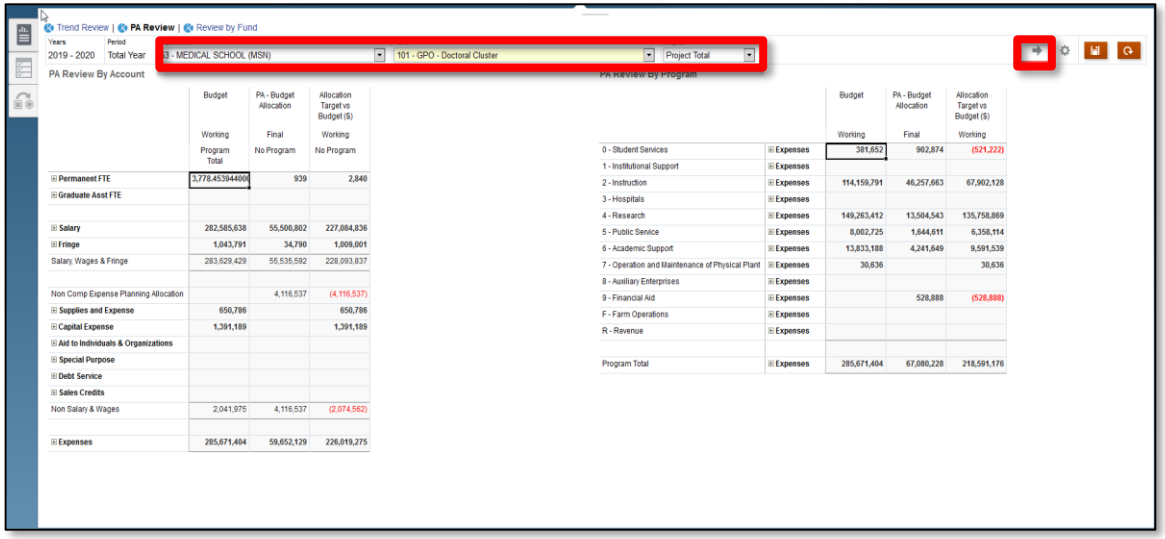
Budget Review – PA Review

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

*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.

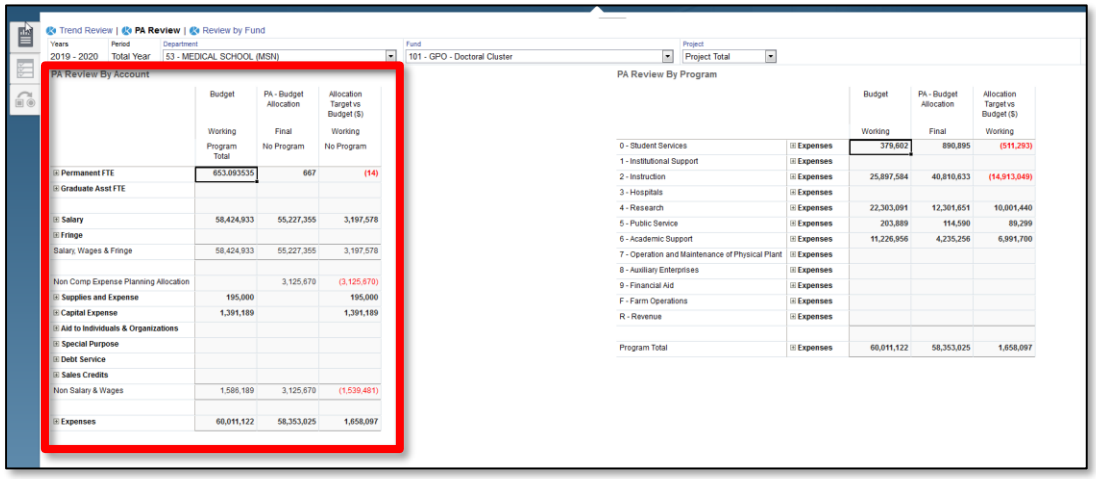


Budget Review – PA Review

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.**

*For Institutions in the **NE**, **South**, and **West Pods**, this webform may not be applicable if you do not allocate Total Expenditures to the Salary, Fringe, and Non Compensation Expenditures*

*For **Madison** and **Milwaukee** - Major Class Non Compensation Expenditure Categories in this form are only applicable for the working budget, as data is loaded at the Total Non Compensation Expenditure level from the Planning Allocation Tool.*

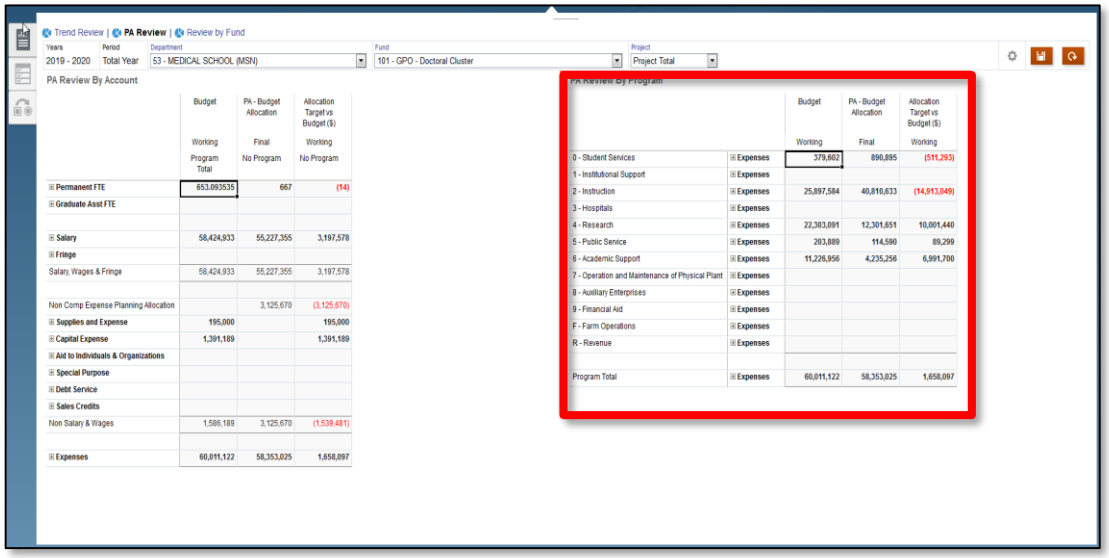


Budget Review – PA Review

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.**

*Institutions in the **NE, South**, and **West** Pods will be able to drill into Total Expenditures to view Salary Data by Position and NonComp data by Major Class.*

***Madison** and **Milwaukee** will only have their data available at the Total Expenditure level. This is based on the data available from the Planning Allocation Tool.*



Budget Review – Review by Fund

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.**

Trend Review | PA Review | **Review by Fund**

Consolidated Review By Fund

Department: 53 - MEDICAL SCHOOL (MSN)
Project: Project Total

		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
	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
	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
	Capital Expense	2,450,389	1,391,189						1,391,189
	Aid to Individuals & Organizations	2,173,535							
	Special Purpose	0							
	Debt Service								
	Sales Credits	(19,330,528)							
Program Total	Non Salary & Wages	3,539,552	1,586,189		455,786				2,041,975

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Budget Review – Review by Fund

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

All descendants of your User Institution, and All Projects are available in the page dropdown.

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.

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
	Graduate Asst FTE							
Program Total	Salary	758,360	2,799,297	11,755	797,804	9,919		5,058,011
	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
	Capital Expense	38,280	1,350		3,180			48,701
	Aid to Individuals & Organizatio	2,434			719	2,291		3,010
	Special Purpose		100					100
	Debt Service							
	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							

Budget Review – Review by Fund

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
	Graduate Asst FTE							
Program Total	Salary	758,360	2,799,297	11,755	797,804	9,919		5,058,011
	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
	Capital Expense	38,280	1,350		3,180			48,701
	Aid to Individuals & Organizations	2,434			719	2,291		3,010
	Special Purpose		100					100
	Debt Service							
	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							

Knowledge Check – Budget Review

Budget Reports

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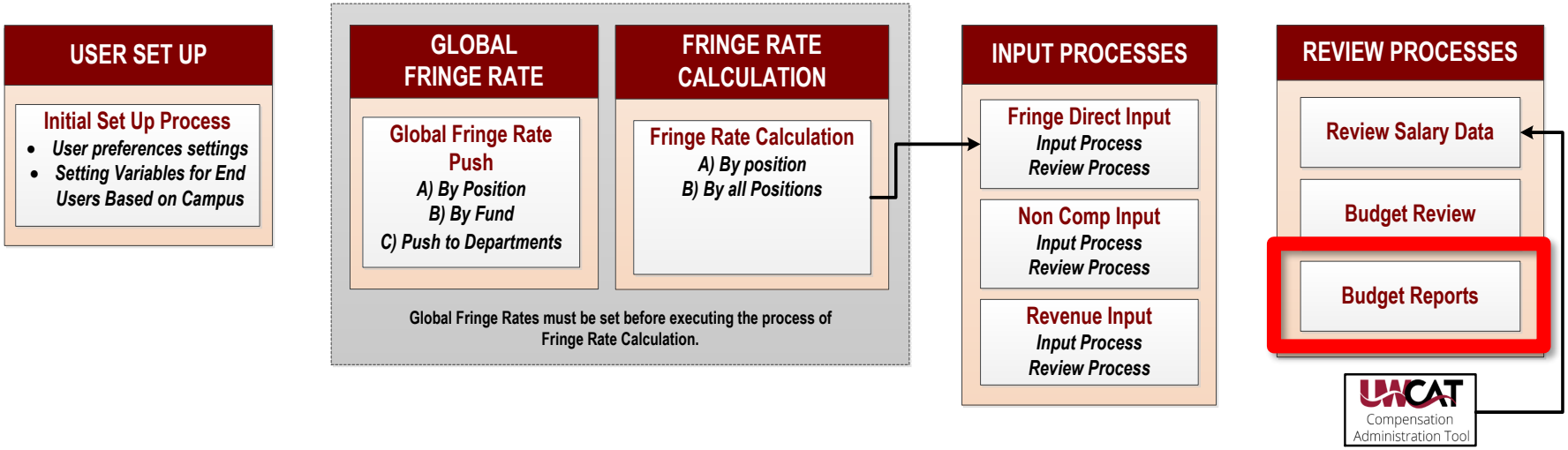
Budget Reports in Annual Budgeting Process



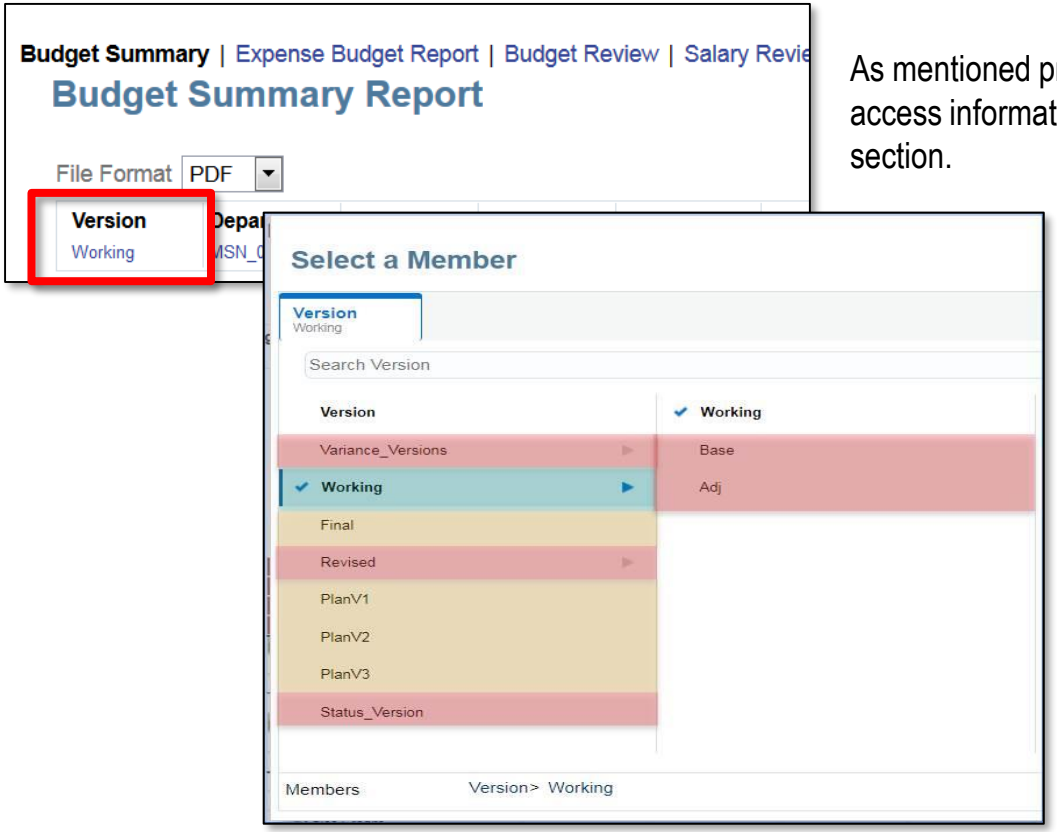
Budget Reports

PlanUW offers seven reports to analyze budget data. **All of the reports can be accessed through the Budget Reports tile** and can be retrieved in **HTML**, **PDF**, and **Excel** formats.

There are 8 budget reports. This is the order in which they will be covered:

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

Point of View Change – Before Continuing



As mentioned previously, the user can change the version to access information in the reports by clicking directly in the POV section.

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

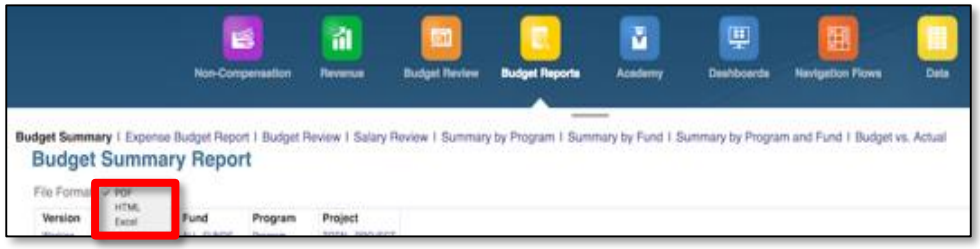
Selecting the versions highlighted in red will only return partial or no information for the report.

C 78

Budget Summary in HTML Format

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

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

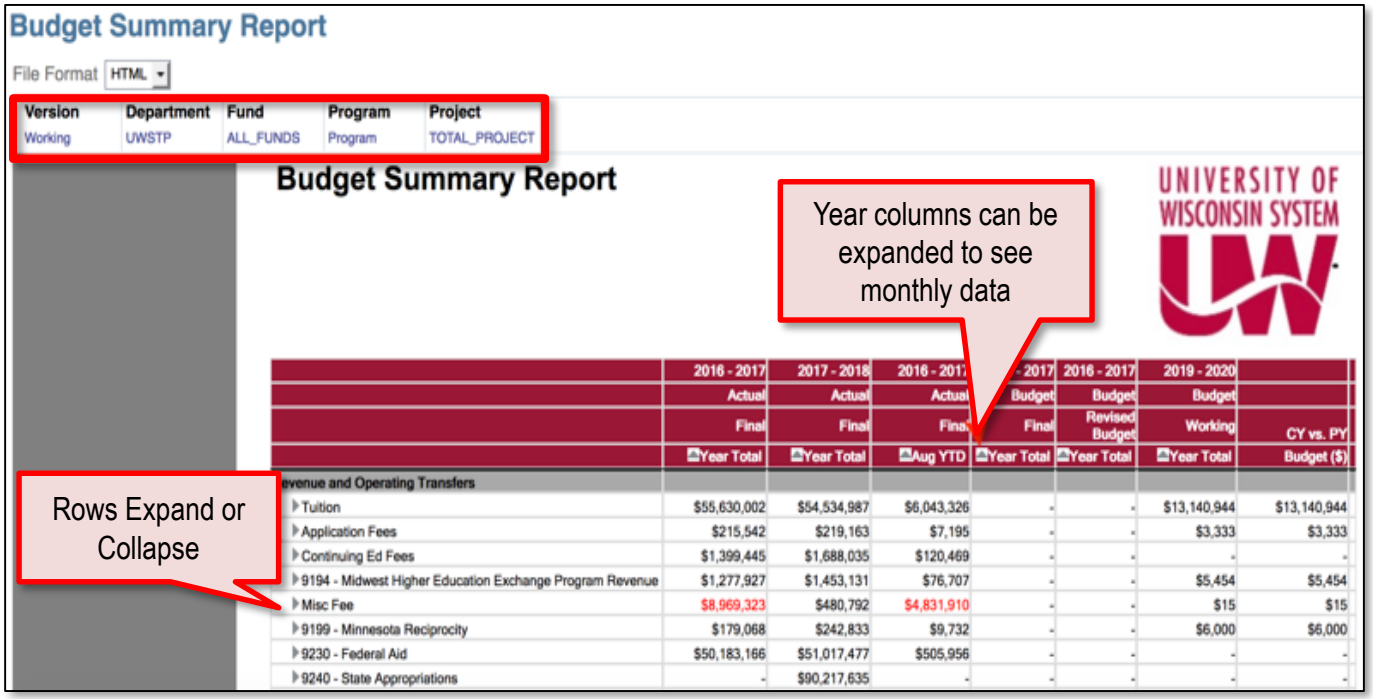


From the File Format drop-down, select the format desired. For this section of the presentation, select HTML

C 79

Budget Summary in HTML Format

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	Department	Fund	Program	Project
Working	UWSTP	ALL_FUNDS	Program	TOTAL_PROJECT

Budget Summary Report

UNIVERSITY OF WISCONSIN SYSTEM

Year columns can be expanded to see monthly data

Rows Expand or Collapse

	2016 - 2017	2017 - 2018	2016 - 2017	- 2017	2016 - 2017	2019 - 2020	
	Actual	Actual	Actual	Budget	Budget	Budget	
	Final	Final	Final	Final	Revised Budget	Working	CY vs. PY
	Year Total	Year Total	Aug YTD	Year Total	Year Total	Year Total	Budget ($)
evenue 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	-	-	-	-	-

Budget Summary in HTML Format

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

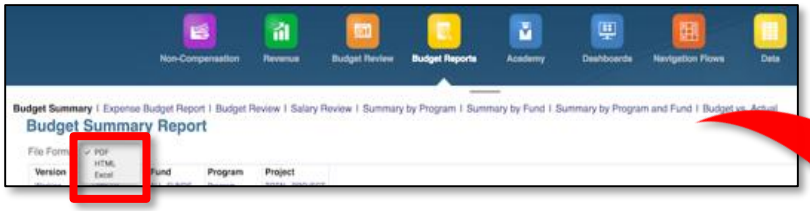
Report: Budget Summary Report

Run by: mtyburowski@huronconsultinggroup.com
2018-10-05
1:37:46

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

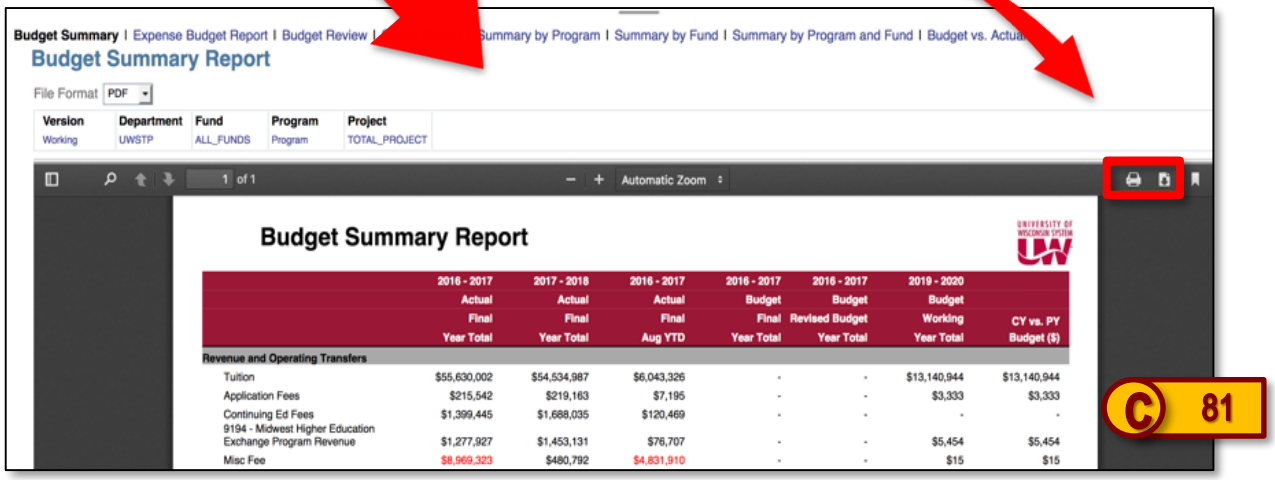
Budget Summary in PDF Format

To open a report in PDF format, follow the steps already outlined to access reports. Adjust the POC as necessary, then select the PDF option from the File Format drop down and the report will display.



Reports can be downloaded and/or printed!

Since PDF reports can be downloaded, we will demonstrate how downloading a PDF reports appears in **Chrome**, **Firefox**, and **Internet Explorer**.

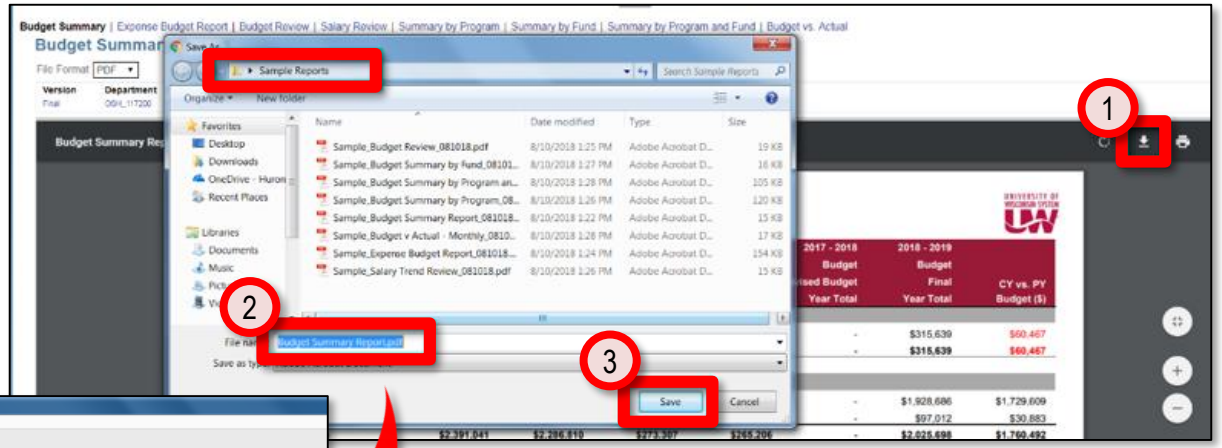


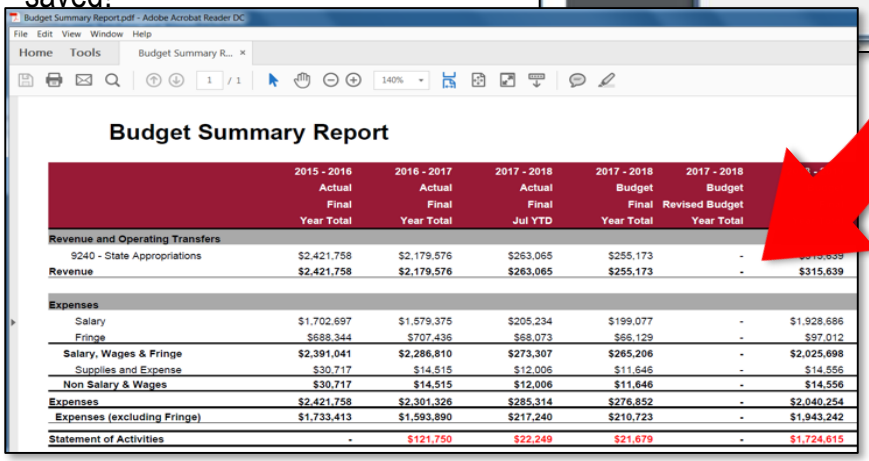
Budget Summary PDF Format in Chrome

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!



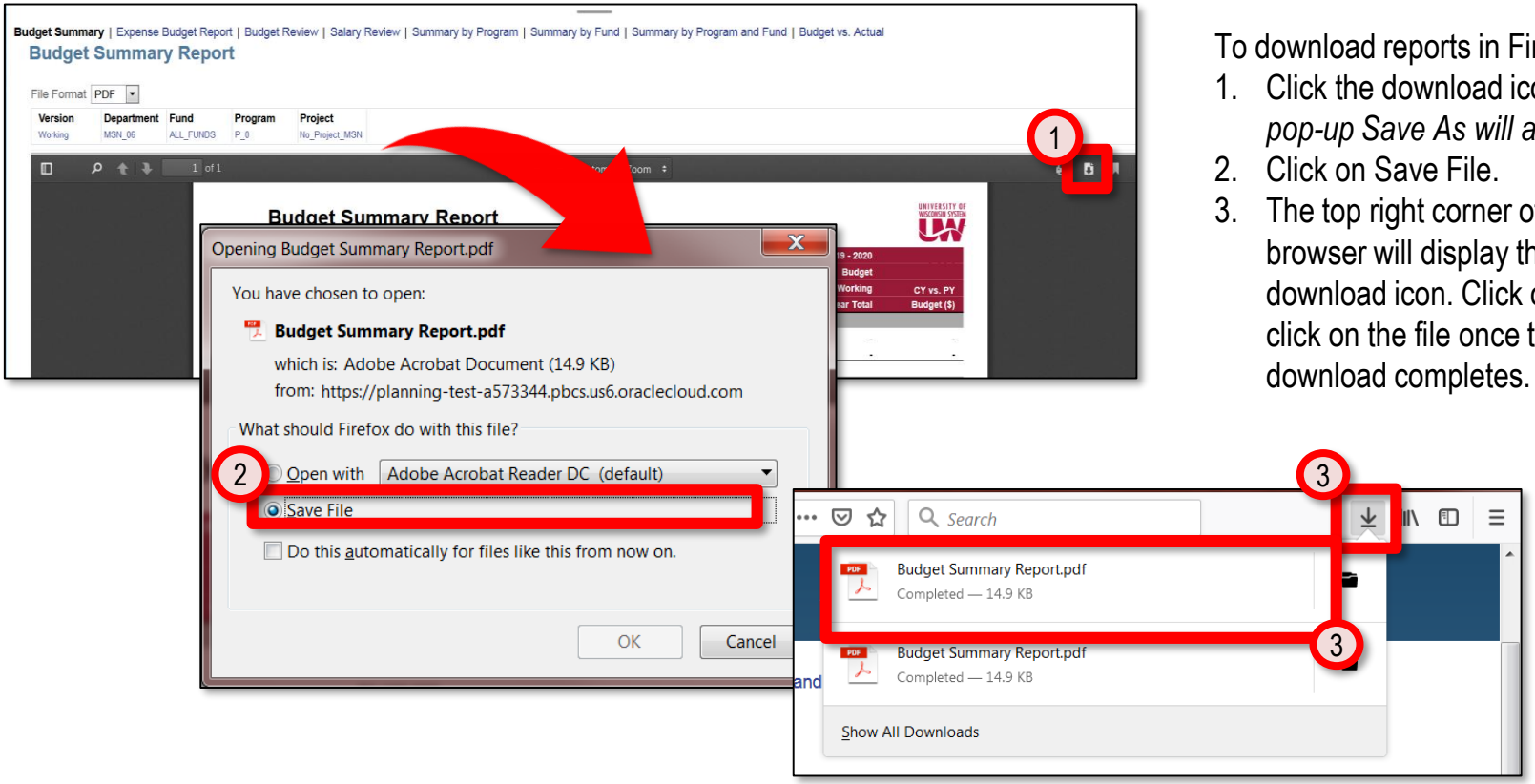


Budget Summary Report

	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	[illegible]
Revenue and Operating Transfers						
9240 - State Appropriations	$2,421,758	$2,179,576	$263,065	$255,173	-	[illegible]
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**

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

Budget Summary PDF Format in Firefox



To download reports in Firefox:

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.

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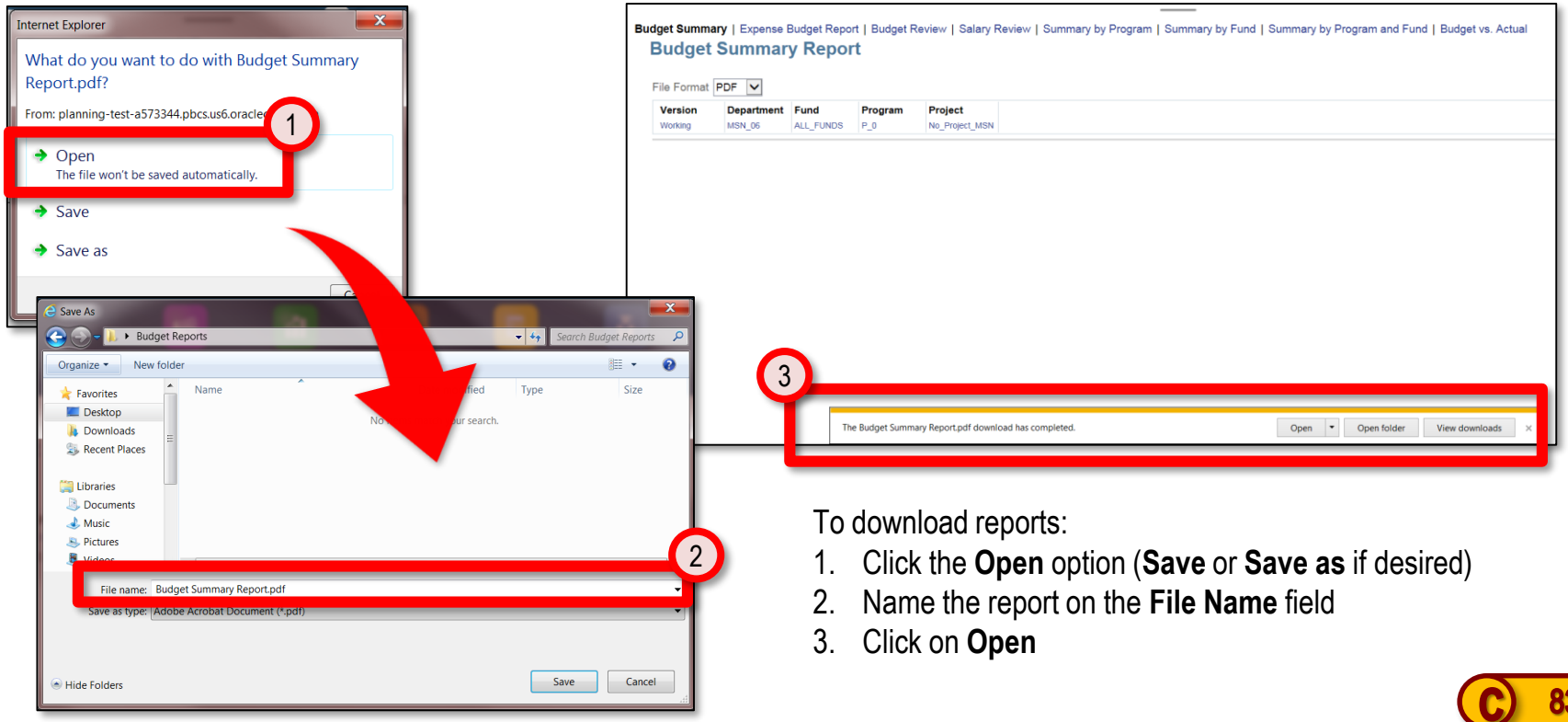
Budget Summary PDF Format in Internet Explorer



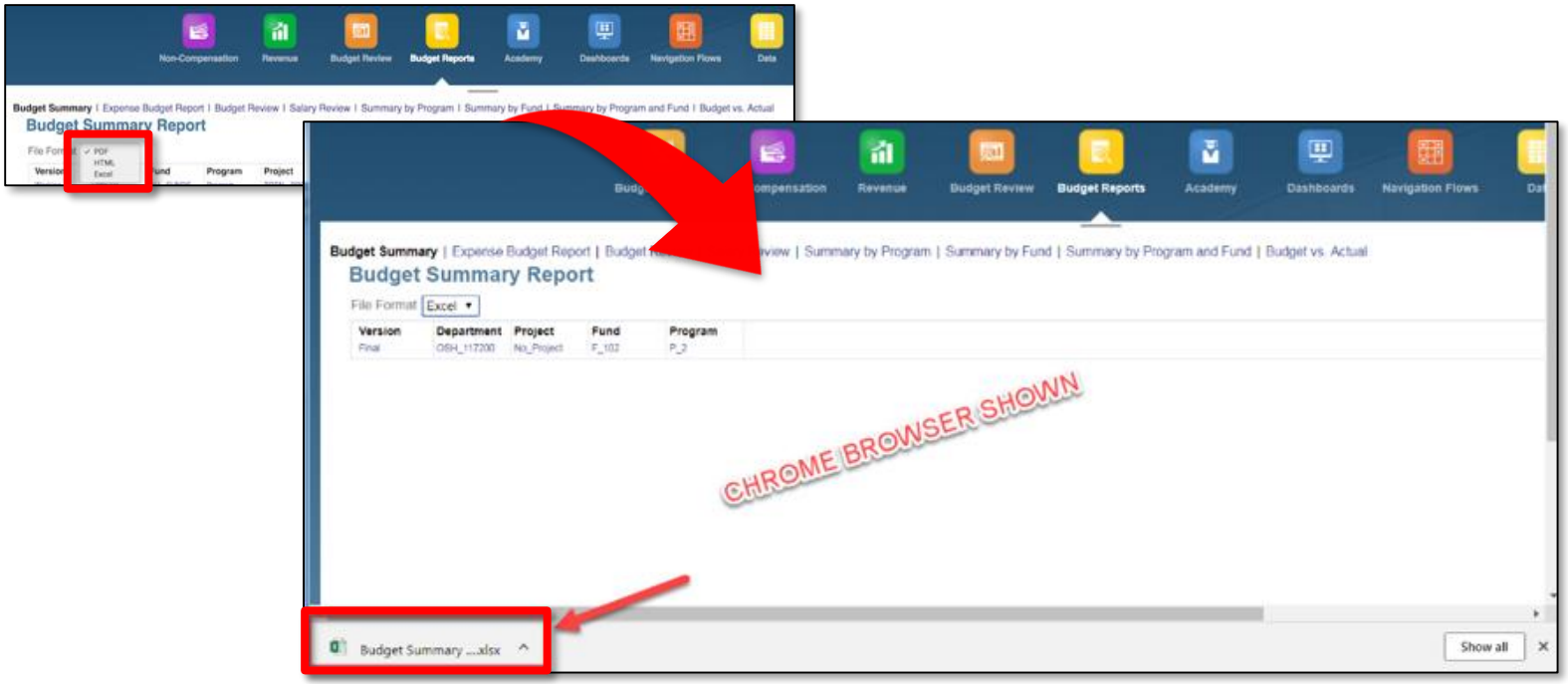
To download reports:

1. Click the **Open** option (**Save** or **Save as** if desired)
2. Name the report on the **File Name** field
3. Click on **Open**

C 83

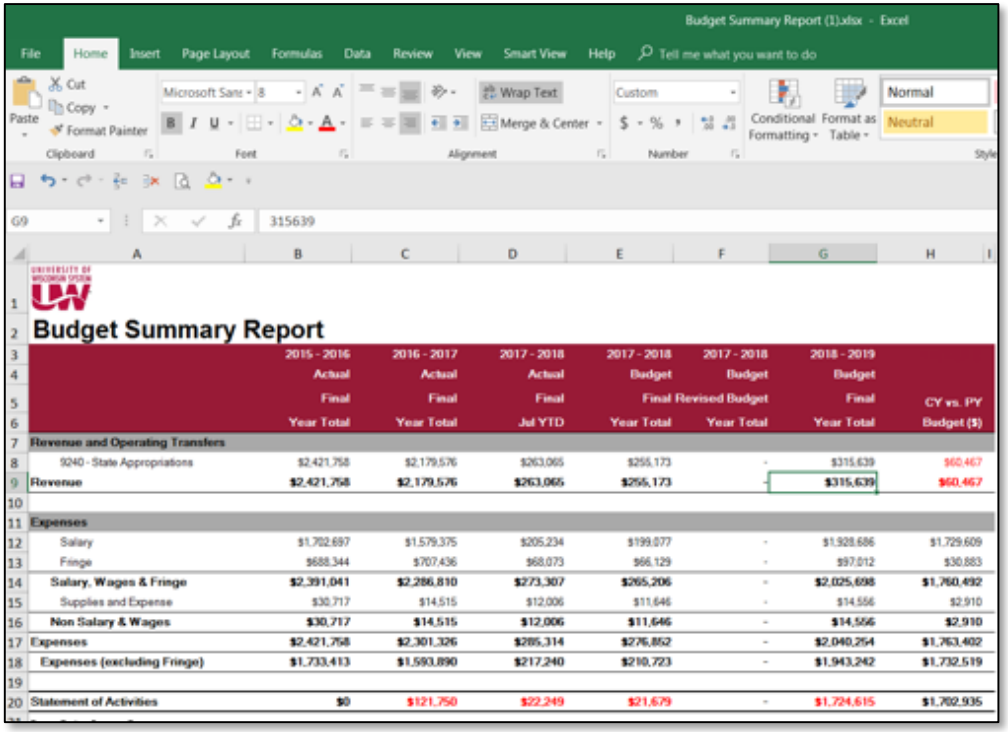
Budget Summary in Excel Format - Chrome

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.** Since this is Chrome, the file will display at the **bottom of the screen**.



C 84

Budget Summary in Excel Format - Chrome



Budget Summary Report

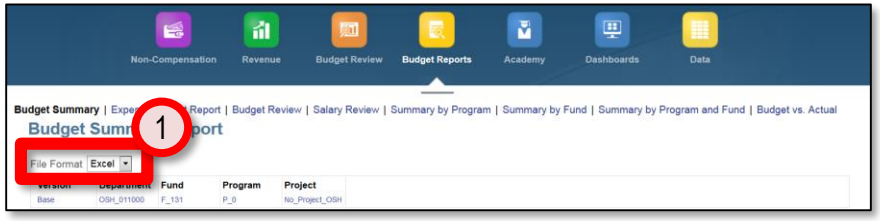
	2015 - 2016 Actual Final Year Total	2016 - 2017 Actual Final Year Total	2017 - 2018 Actual Final Jul YTD	2017 - 2018 Budget Final Year Total	2017 - 2018 Budget Revised Budget Year Total	2018 - 2019 Budget Final Year Total	CY vs. PY Budget ($)
Revenue and Operating Transfers							
9240 - State Appropriations	$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**

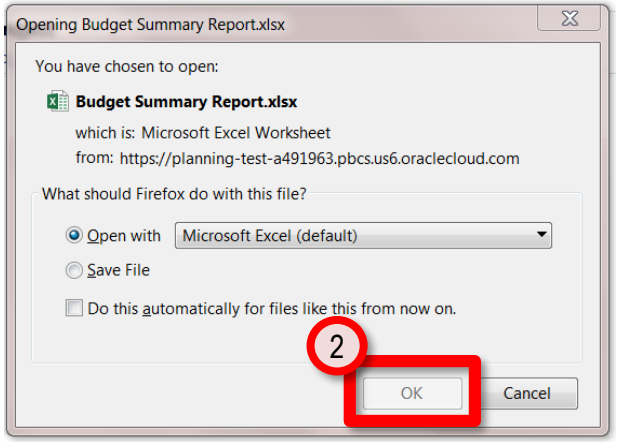
The Excel file is now downloaded and can be opened.

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.**

Budget Summary in Excel Format – Firefox

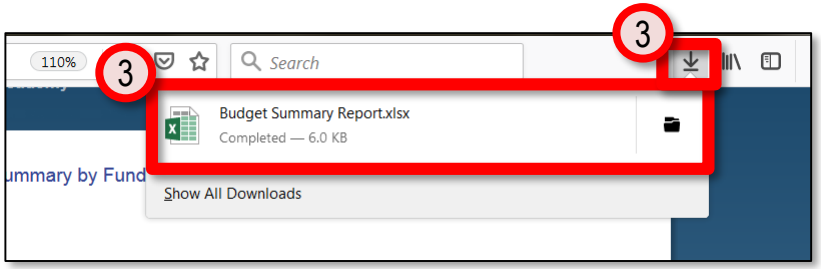
To open a report in Excel format using Firefox, remember to follow the same steps to access reports. Once a Point of View for the data the report should contain, select the Excel option from the Version drop-down.





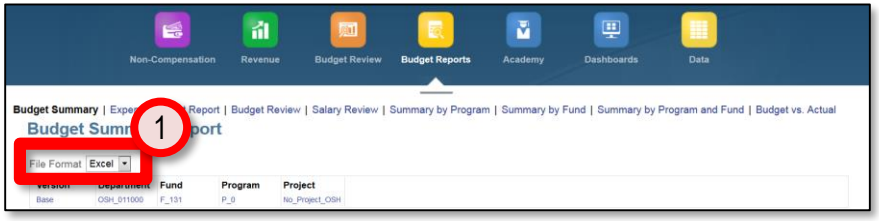
Unlike Chrome, when Excel is selected in the **File Format** option, the "Open with" pop up will display before downloading the report.

1. Select Excel on the File Format option.
2. Click OK to open the report or select Save File and then OK to save a version of the report.
3. If Excel does not open automatically with the report, click the download icon on the top right corner and click on the file to open the report.



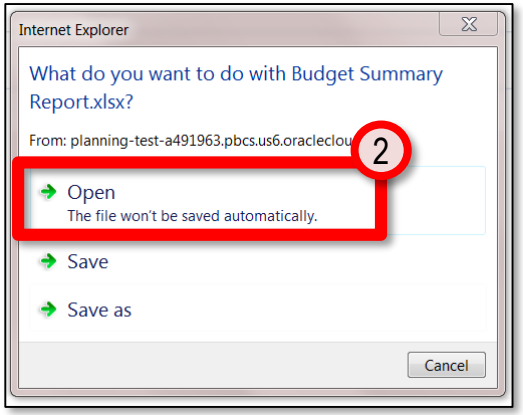
Budget Summary in Excel Format – Internet Explorer

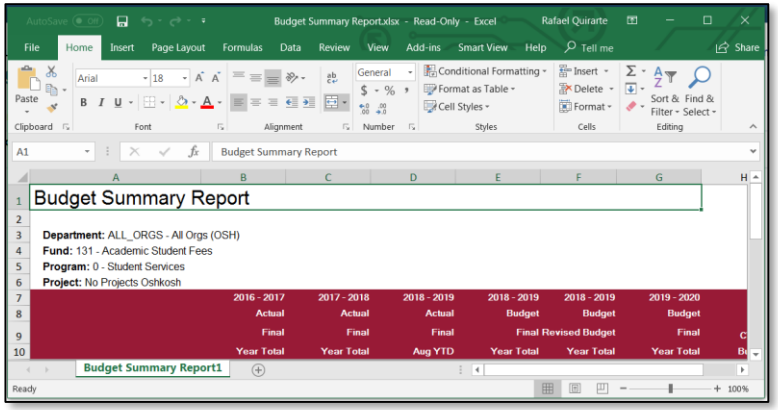
To open a report in Excel format using Firefox, remember to follow the same steps to access reports. Once a Point of View for the data the report should contain, select the Excel option from the Version drop-down.



In a similar fashion to Firefox, Internet Explorer will open a **"What do you want to do"** pop up.

1. Select Excel on the File Format option.
2. Click on **Open** and the Excel report should open automatically.

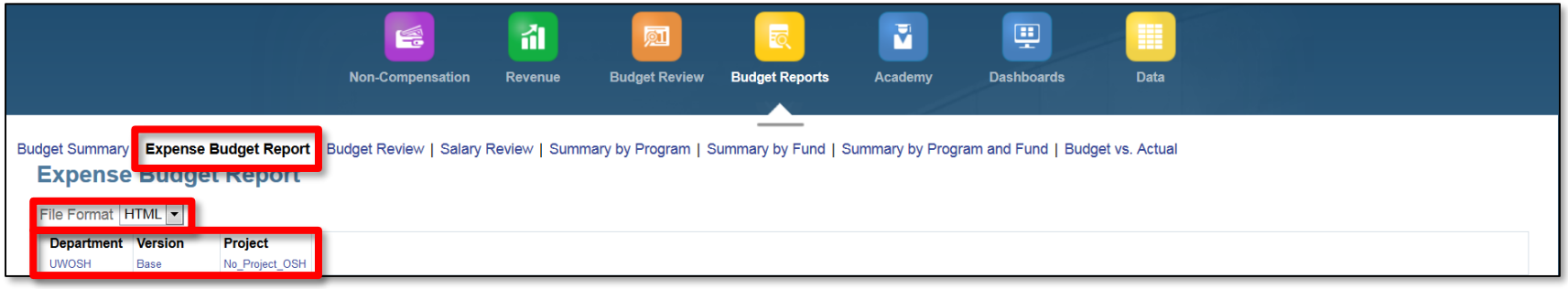




Expense Budget Report

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.



You can adjust the Point of View depending on the data needed for the report.
This report requires a **Department/Version/Project** combination.

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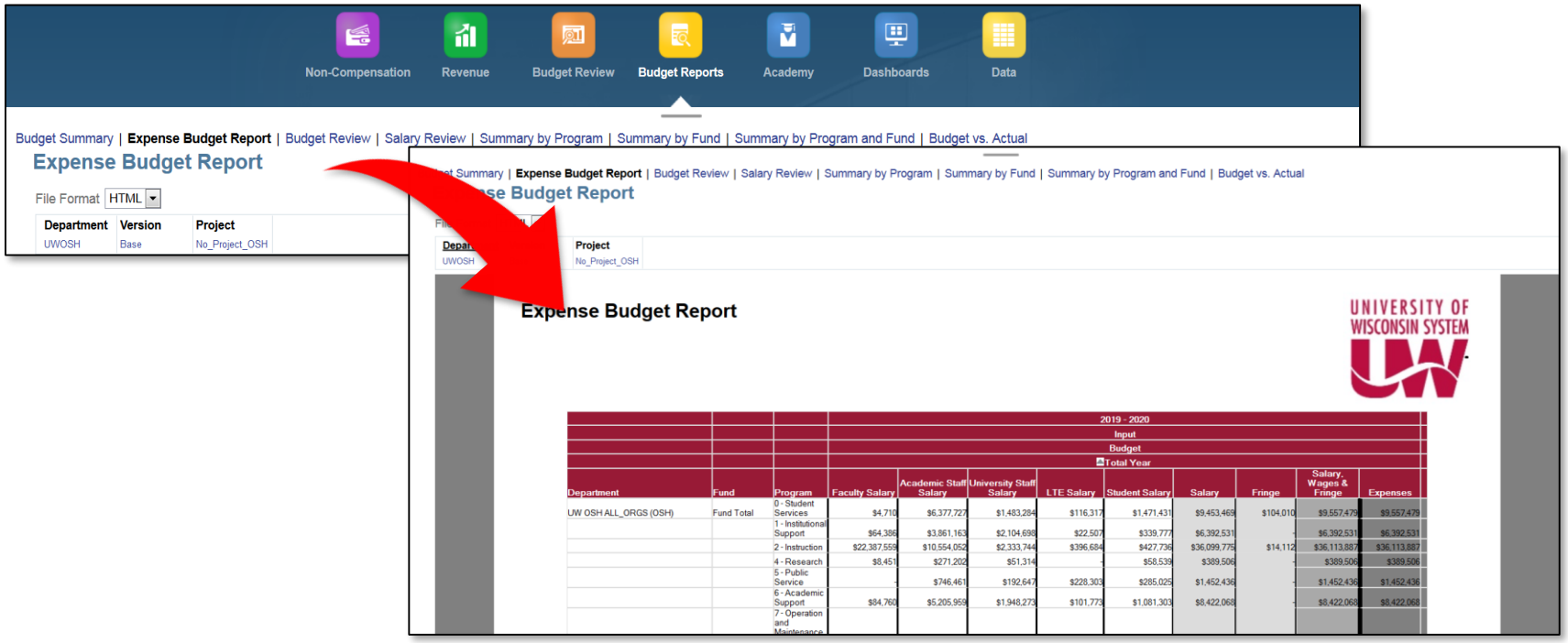
Expense Budget Report

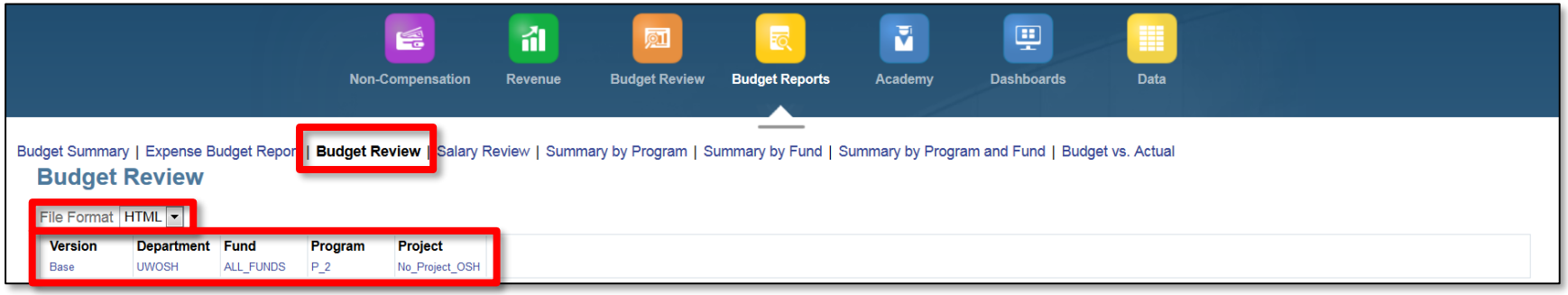
Once the report displays, depending on the format, you can now interact with it.



Budget Review Report

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.

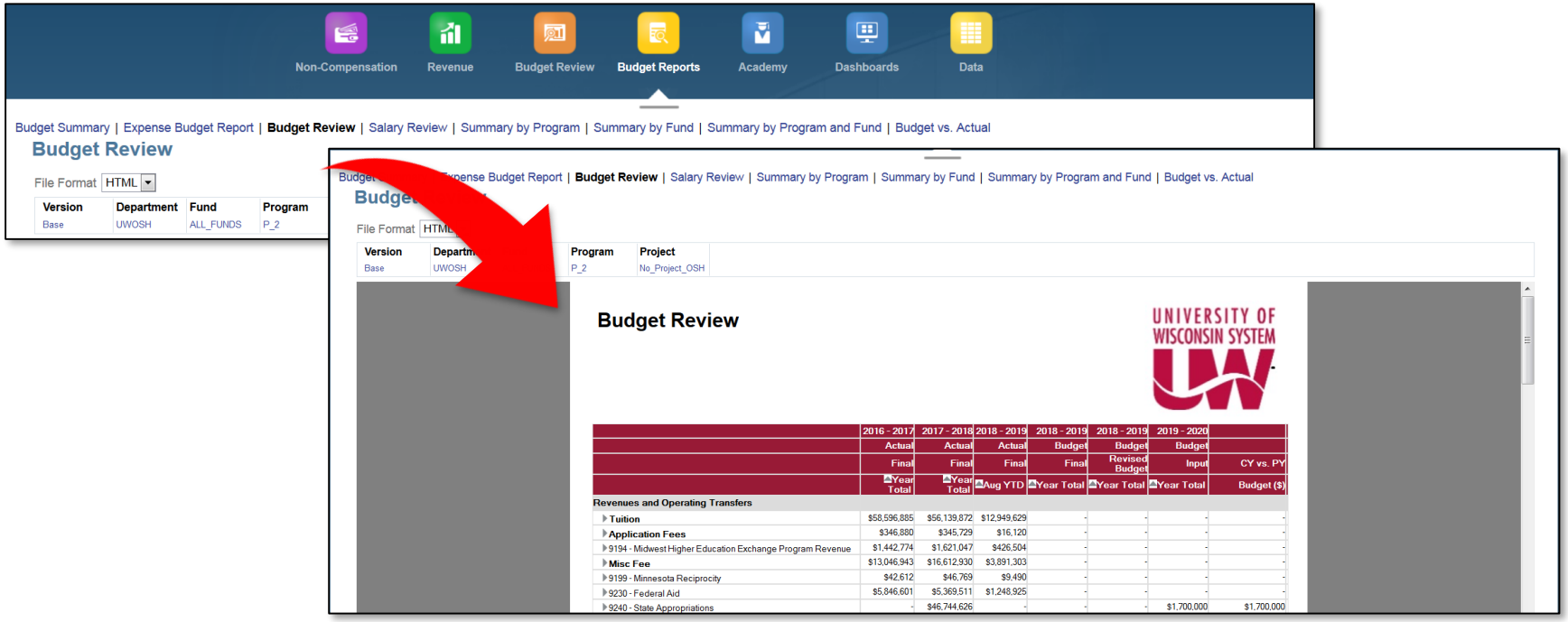


You can adjust the Point of View depending on the data needed for the report.
This report requires a **Version/Department/Fund/Program/Project** combination.

C 87

Budget Review Report

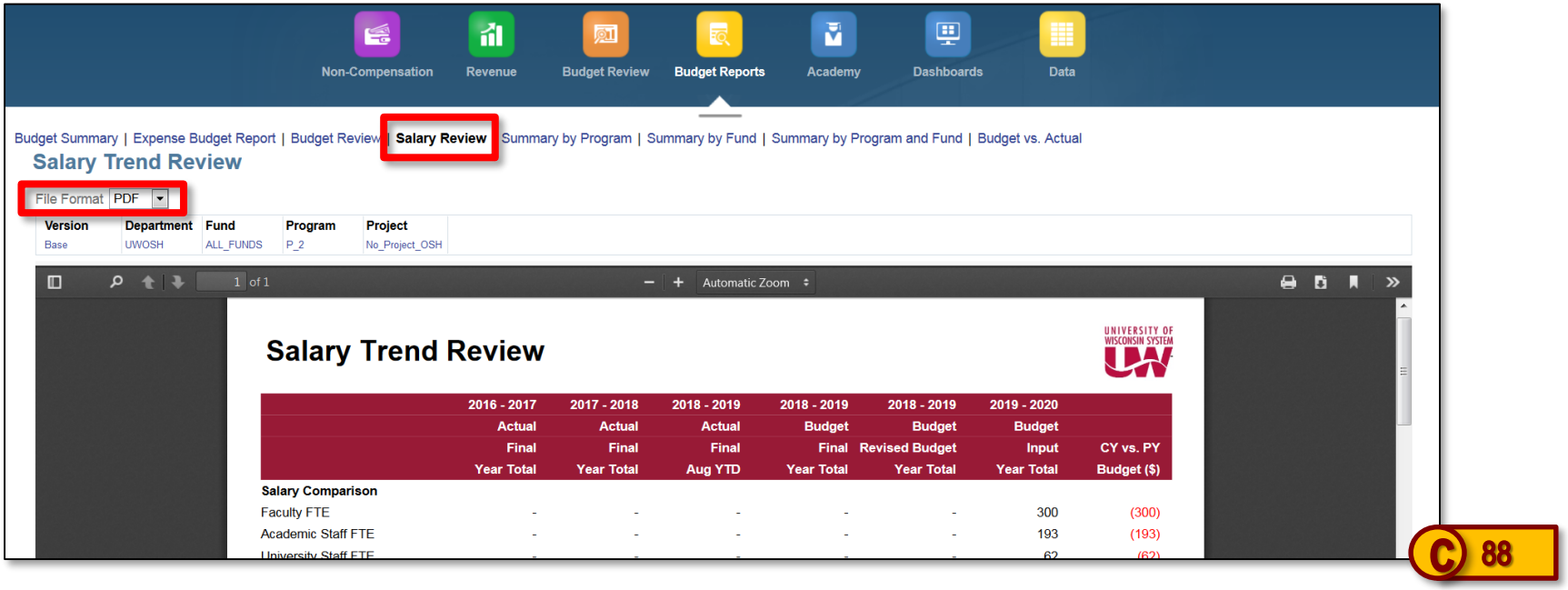
Once the report displays, depending on the format, you can now interact with it.



Salary Review Report

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.



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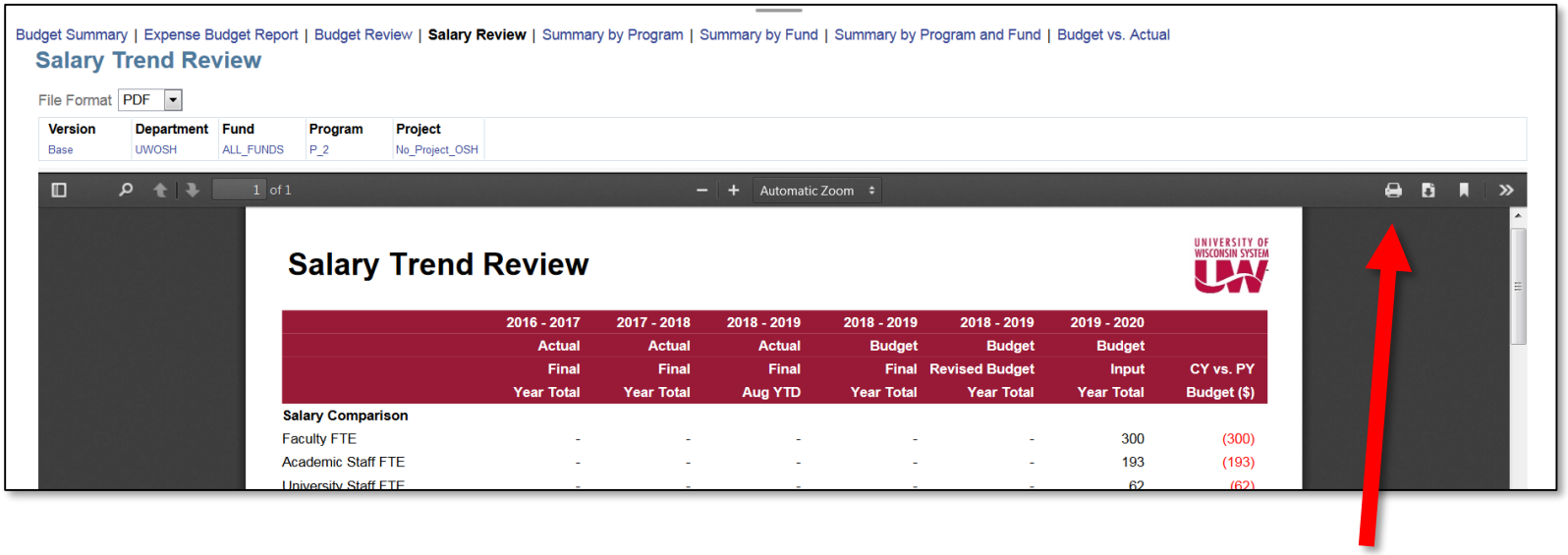
Salary Review Report



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

Salary Trend Review

File Format PDF

Version	Department	Fund	Program	Project
Base	UWOSH	ALL_FUNDS	P_2	No_Project_OSH

1 of 1 Automatic Zoom

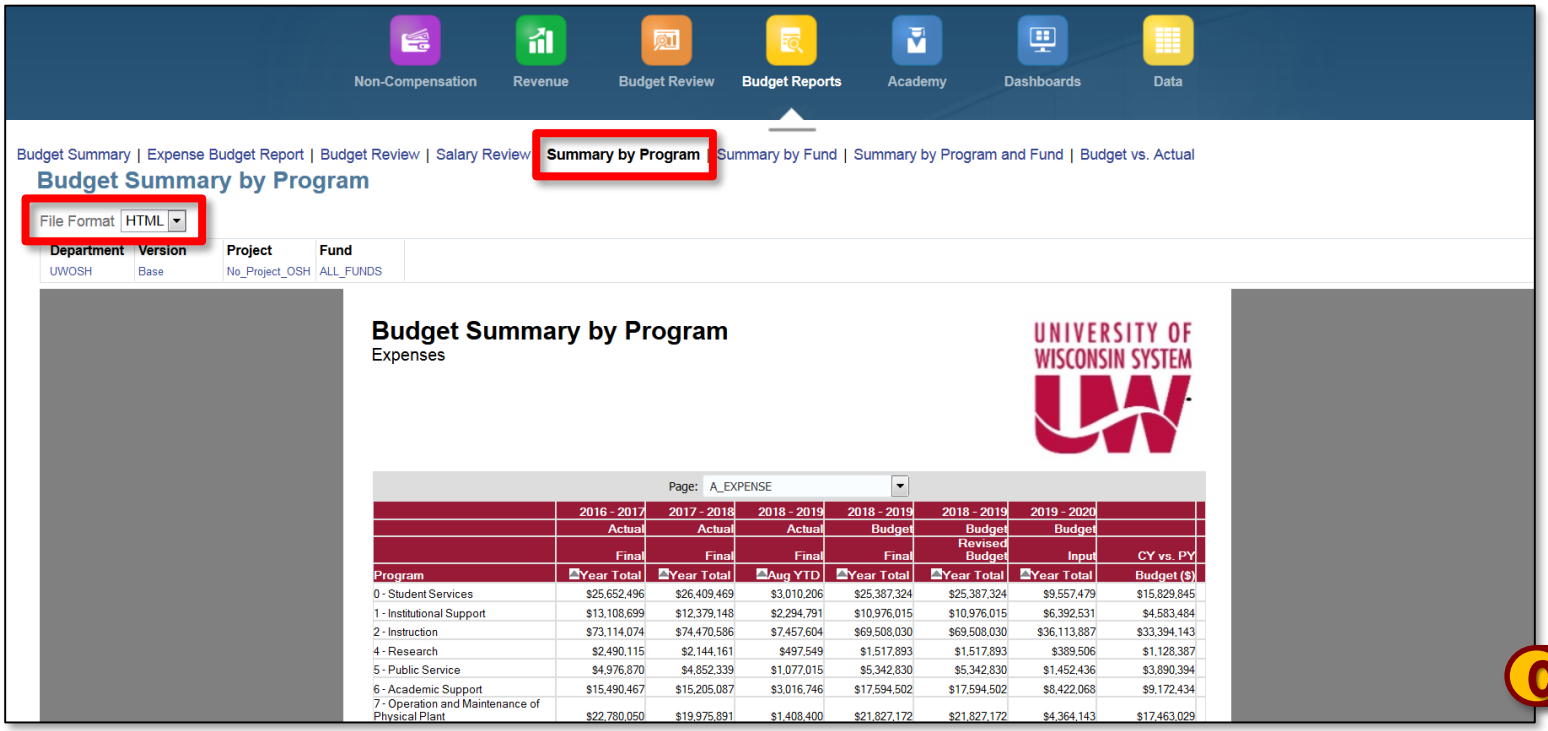
Salary Trend Review

	2016 - 2017 Actual Final Year Total	2017 - 2018 Actual Final Year Total	2018 - 2019 Actual Final Aug YTD	2018 - 2019 Budget Final Year Total	2018 - 2019 Budget Revised Budget Year Total	2019 - 2020 Budget Input Year Total	CY vs. PY 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!

Summary by Program

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



Program	2016 - 2017 Actual Final Year Total	2017 - 2018 Actual Final Year Total	2018 - 2019 Actual Final Aug YTD	2018 - 2019 Budget Final Year Total	2018 - 2019 Budget Revised Budget Year Total	2019 - 2020 Budget Input Year Total	CY vs. PY 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

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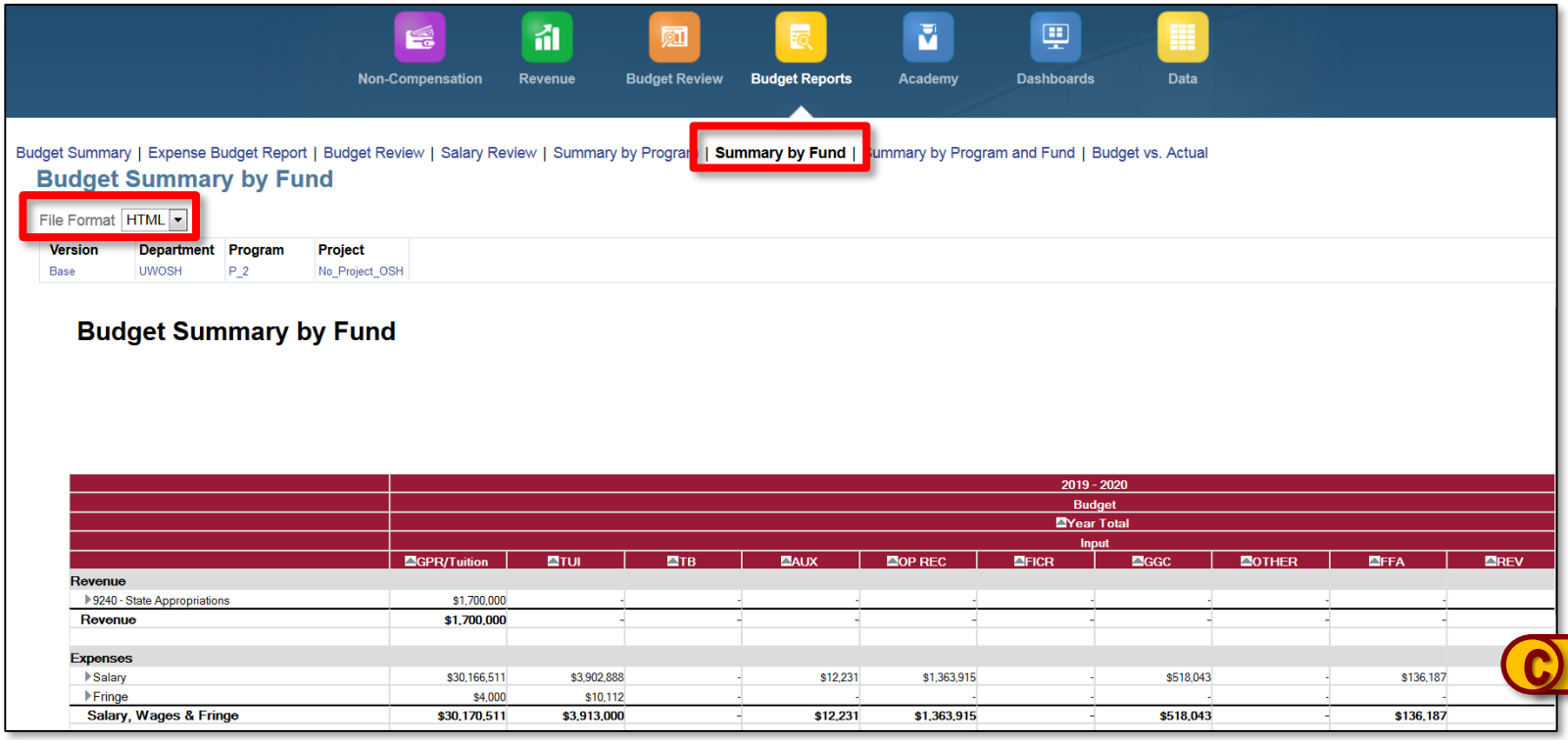
Summary by Fund

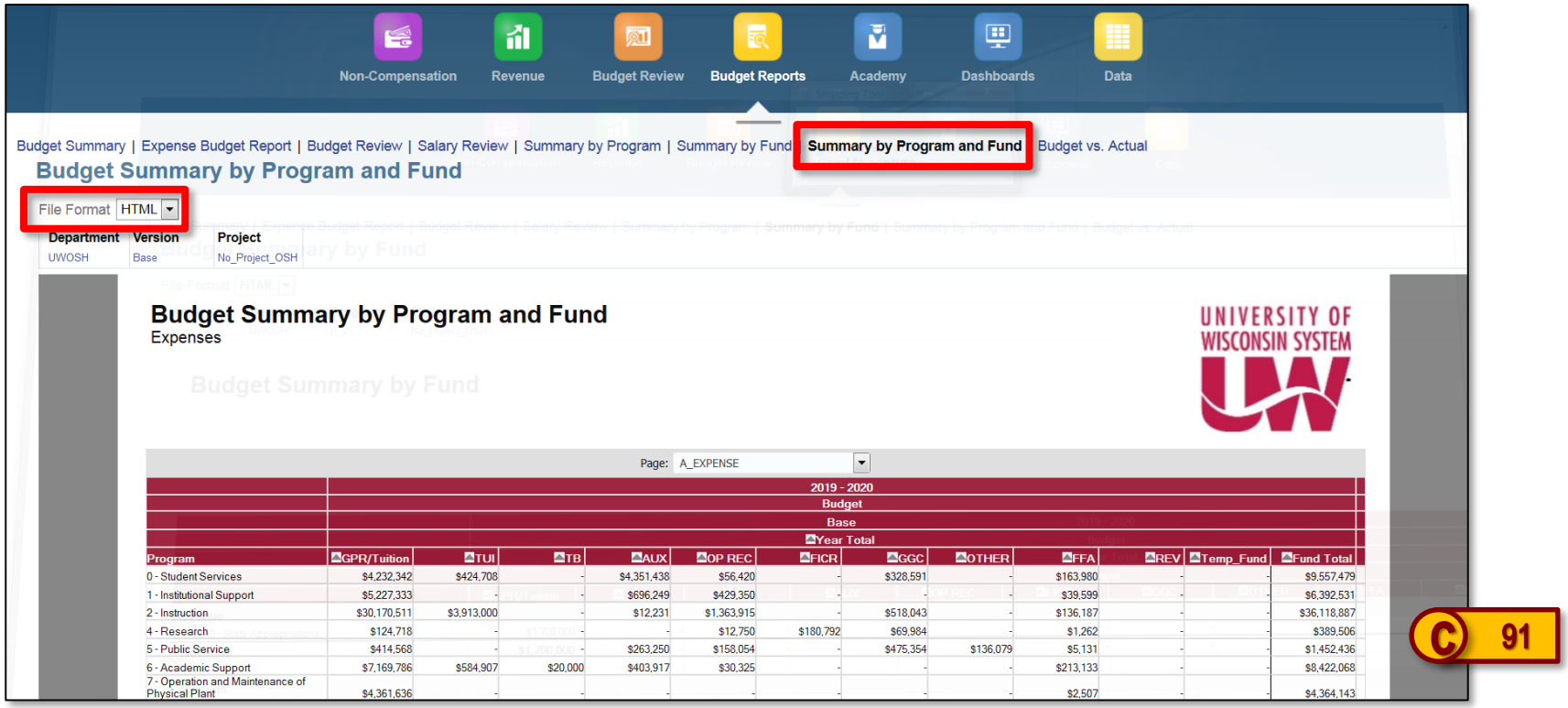
Like all reports, the Summary by Fund report is opened following the same steps.



C 90

Summary by Program and Fund

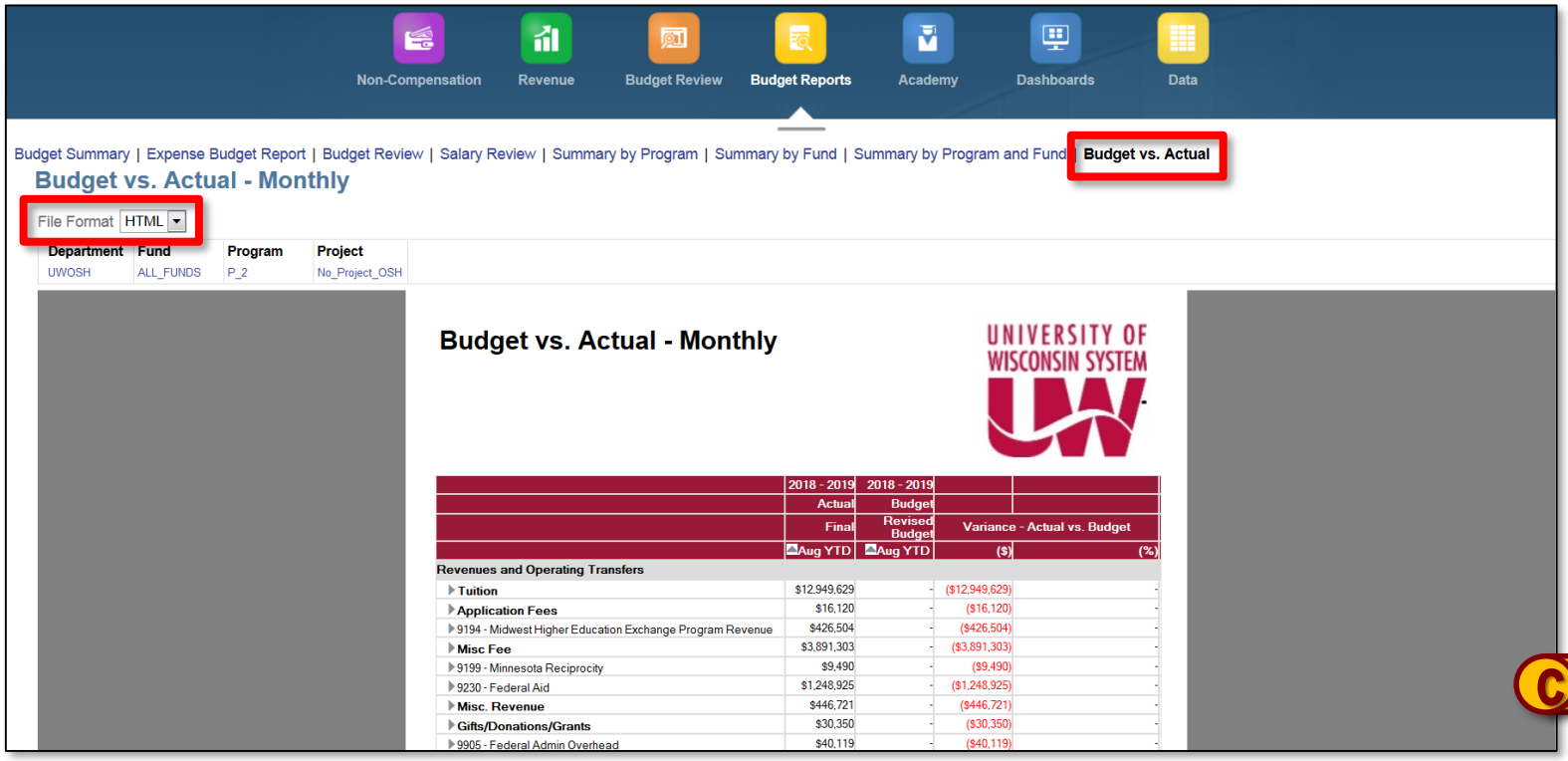
Like all reports, the Summary by Program and Fund report is opened following the same steps.



Program	GPR/Tuition	TUI	TB	AUX	OP REC	FICR	GGC	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	$7,169,786	$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

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



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Course Summary

Completed Course Objectives

In this course, you have been introduced to the UW Planning and Budgeting process and how to perform budgeting tasks within the PlanUW system.

You have learned about:

- The UW Budget Process and Timeline
- A review of the PlanUW System
- How to complete budgeting tasks in PlanUW

Course Feedback and Additional Exercises

It would be helpful to get your feedback on the training course as provided so we can look to improve for future sessions.

- What worked well?
- What could be improved?
- How do you feel we can best support you during the FY20 Budget Process?

Time Pending – we are happy to go through any scenario's or exercises you'd like to work through.