

# 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



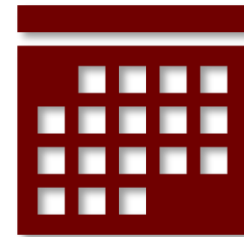
# Before We Begin

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.

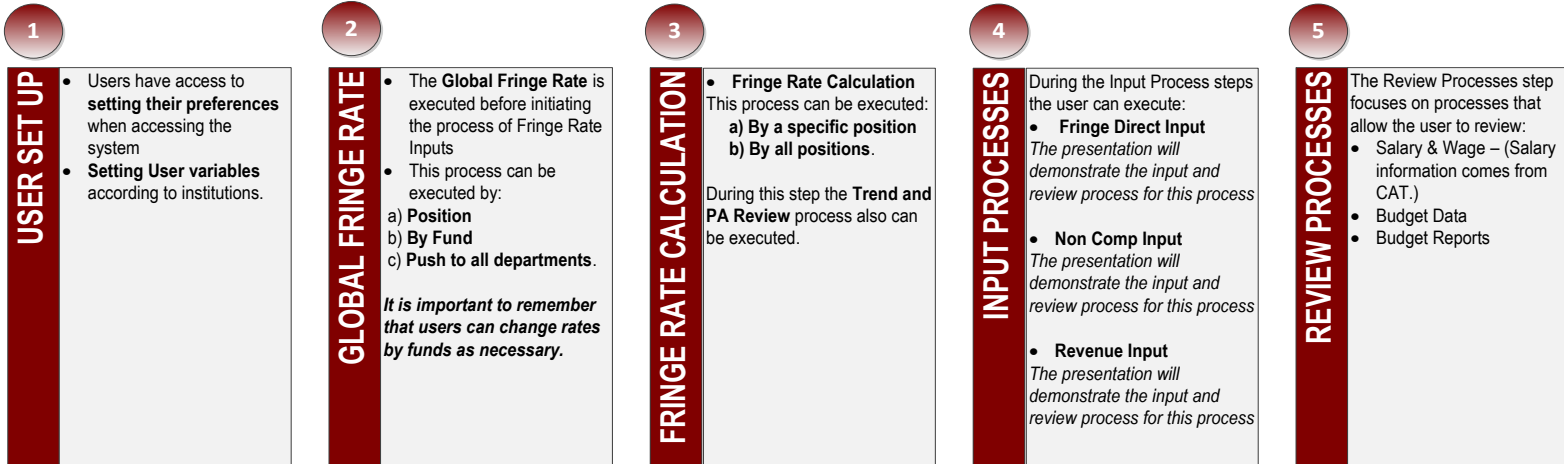
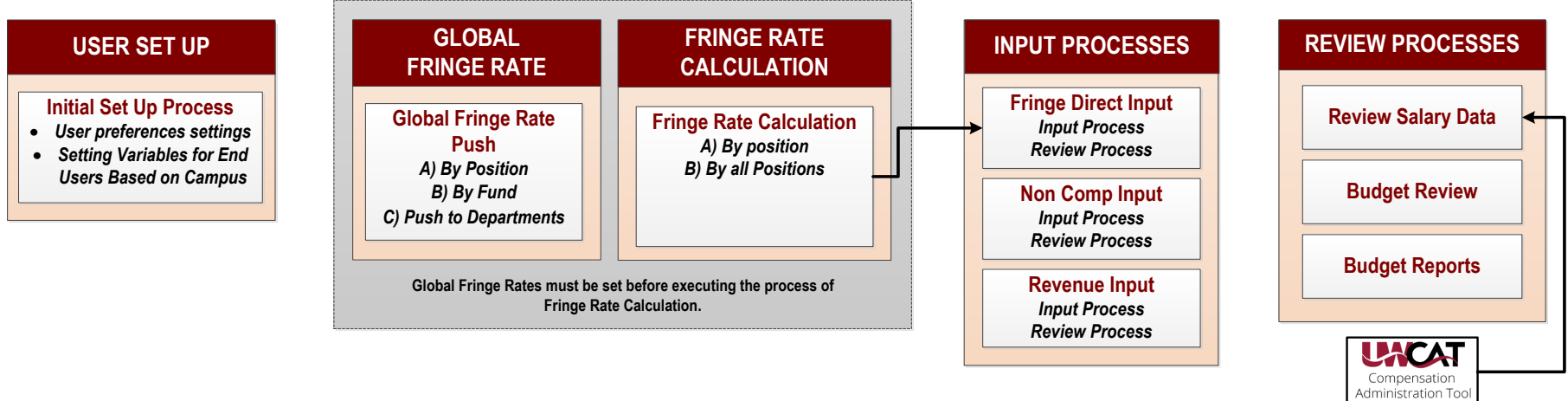
**IMPORTANT:** When a slide contains this  on the **bottom right section** of the slide, it means that the slide in question is referenced in the **Quick Reference Guide** in the page number contained in the logo. **Remember, you get to take the Quick Reference Guide with you!**

# UW Budget Process and Timeline

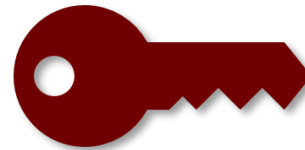




# Budgeting Process



# 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



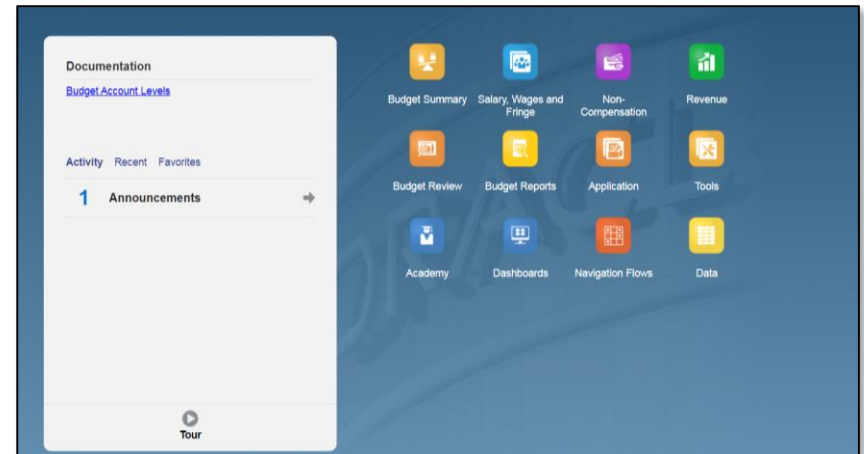
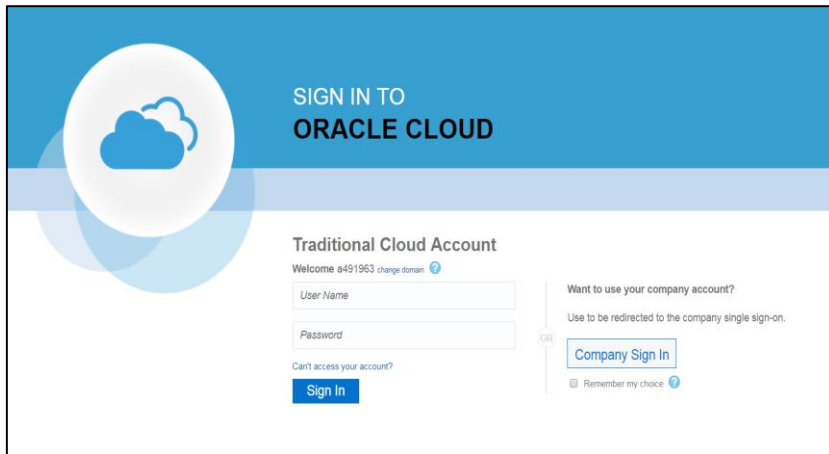
Firefox is the recommended browser

# Logging Into PlanUW & The PlanUW Homepage

PlanUW is UW Single Sign On enabled. To log into PlanUW :  
<https://planning-a573344.pbc.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.



# 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.

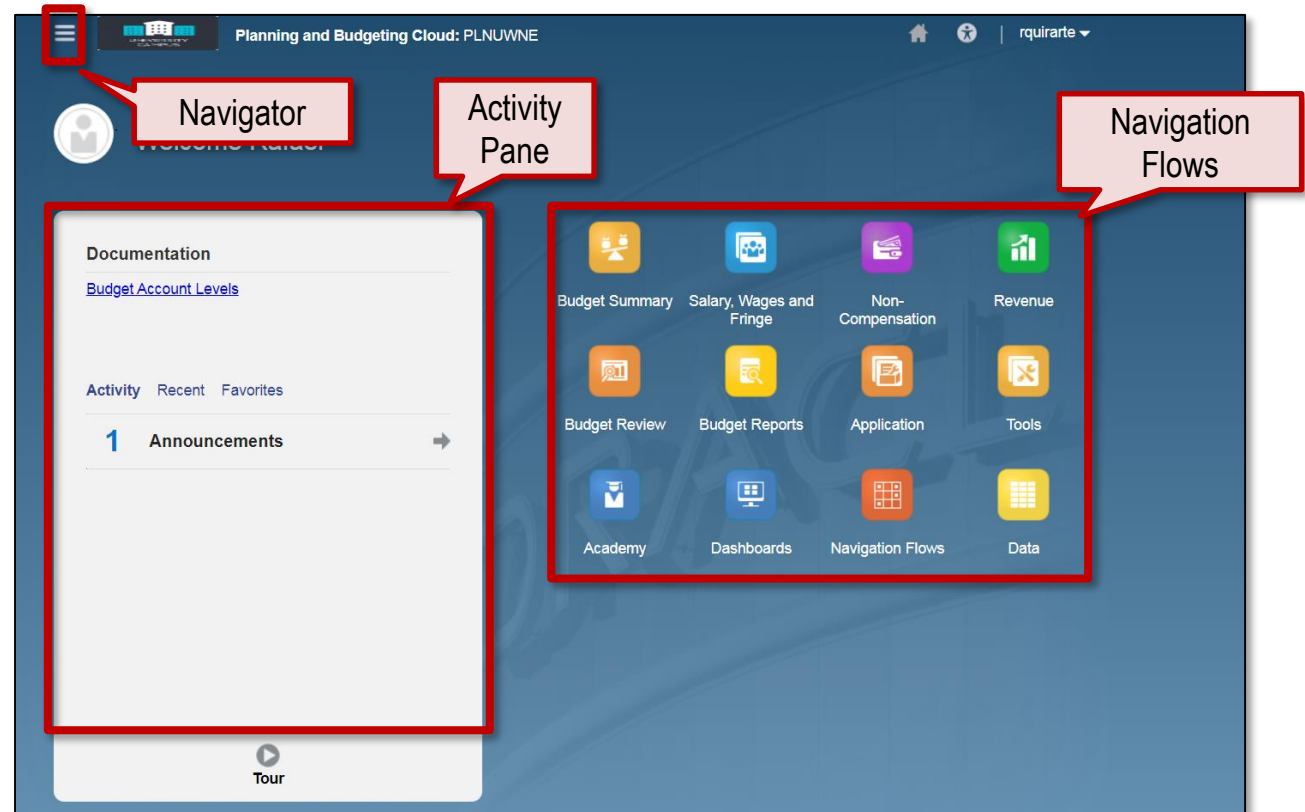
# The PlanUW Homepage



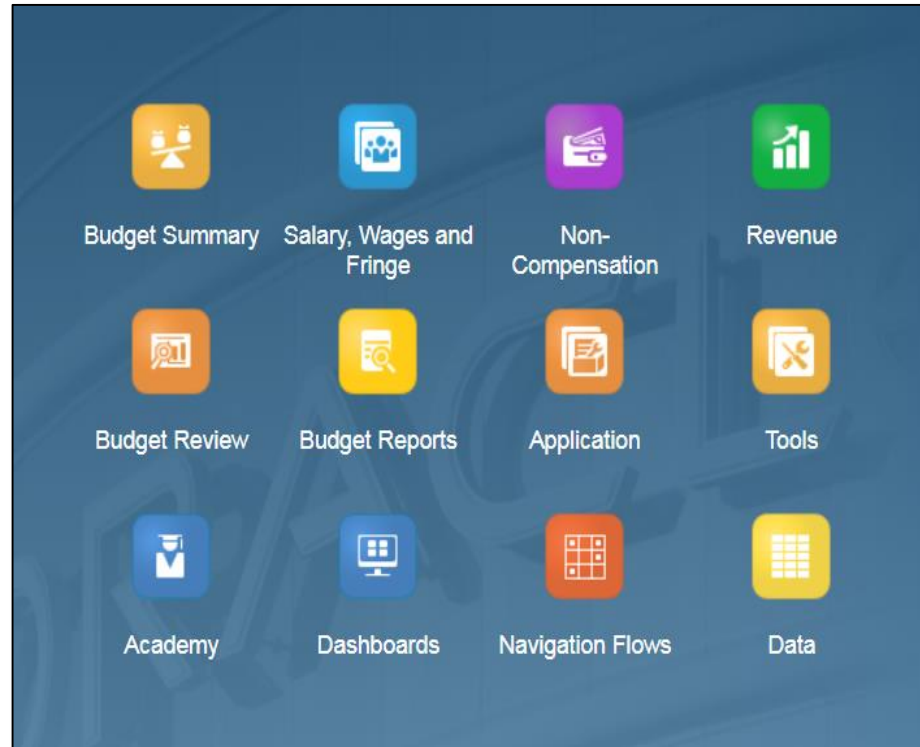
# The PlanUW Homepage

The PlanUW Home Page consists of three main regions:

- Navigator
- Activity Pane
- Navigation Flows



# 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.

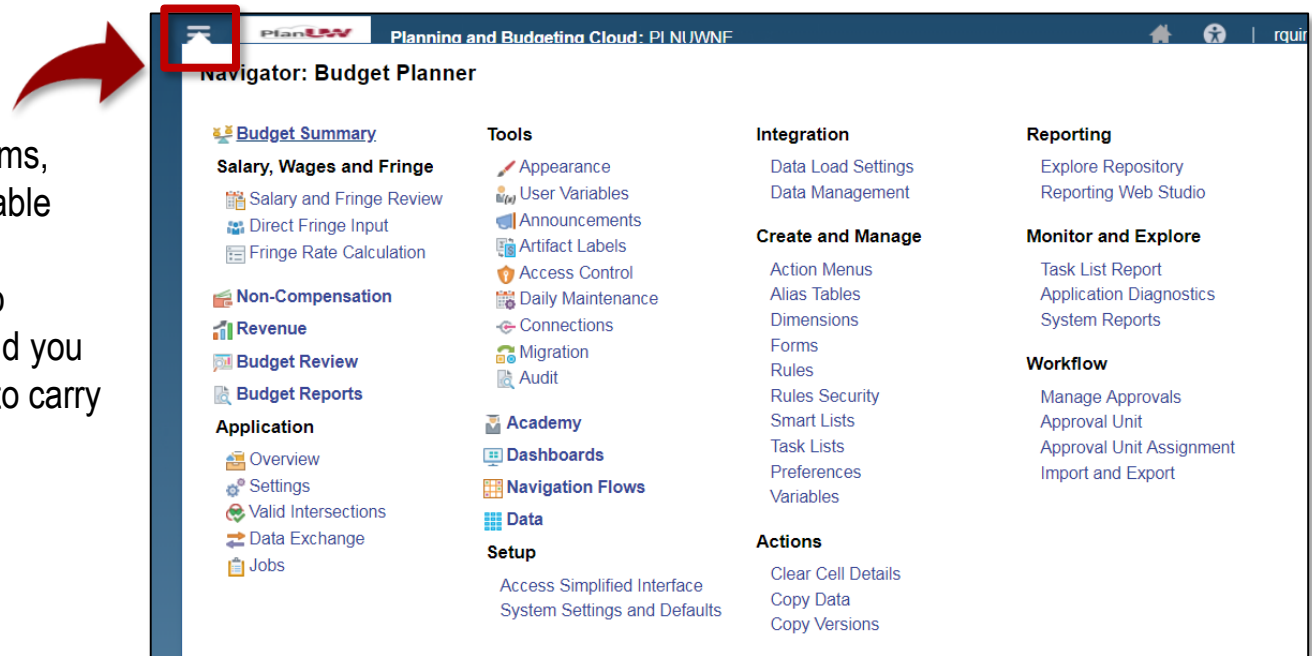
- The navigation flows provide you with a very simple and streamlined outline and order to each step in the budgeting process.



# The PlanUW Homepage


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

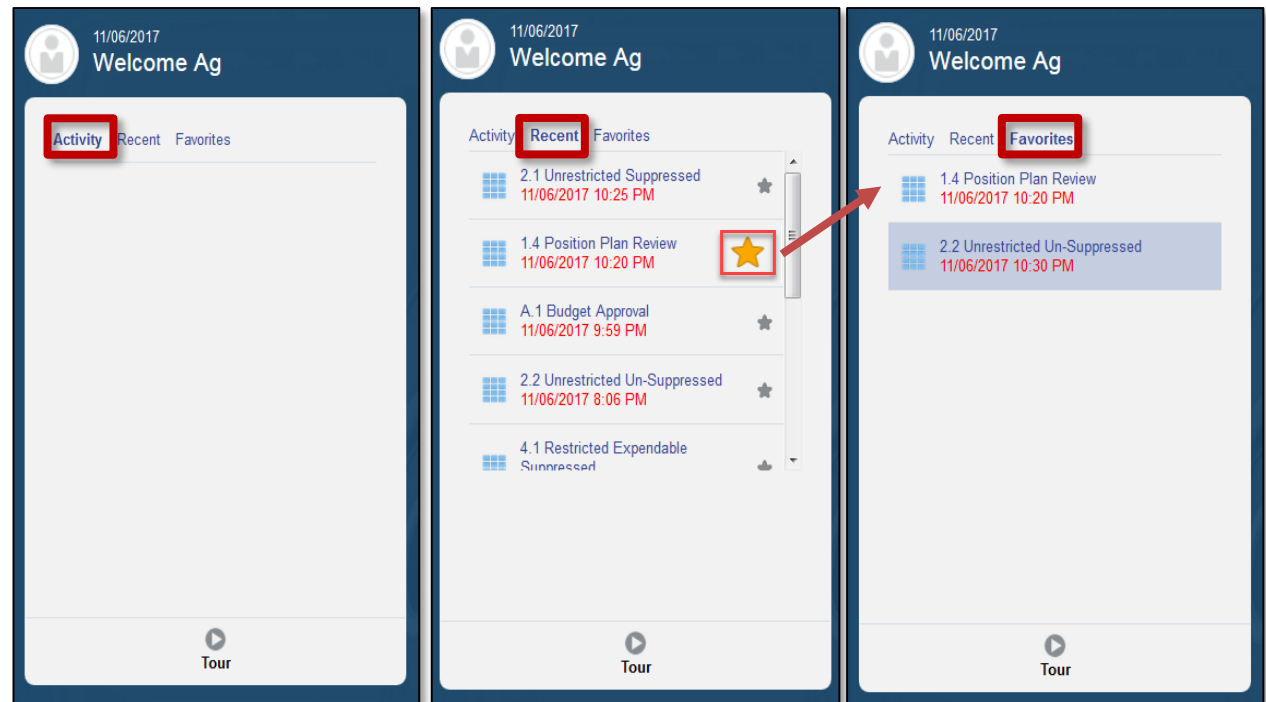
- While you have access to Navigator, it is recommend you use the navigation flows to carry out all budgeting tasks.



# The PlanUW Homepage

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

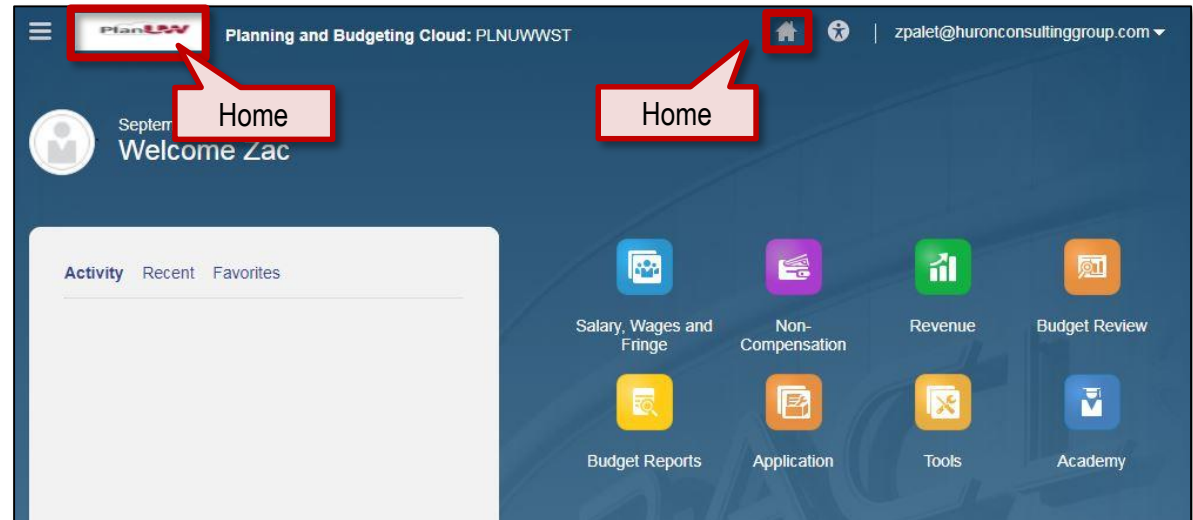
Objects can be selected as favorites for easy access by clicking on the 



# The PlanUW Homepage

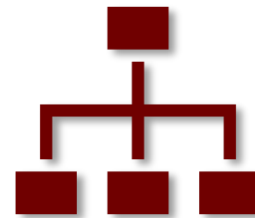
You may return to the home page by:

- Clicking the  logo
- Clicking **Home** 

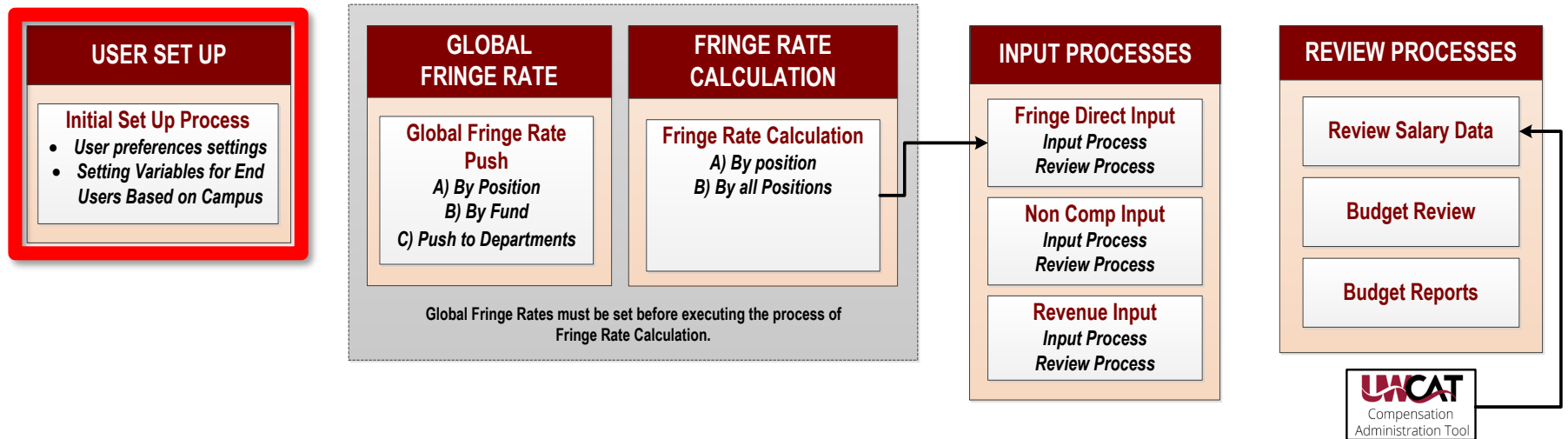


You will use the Home / PlanUW logo often!

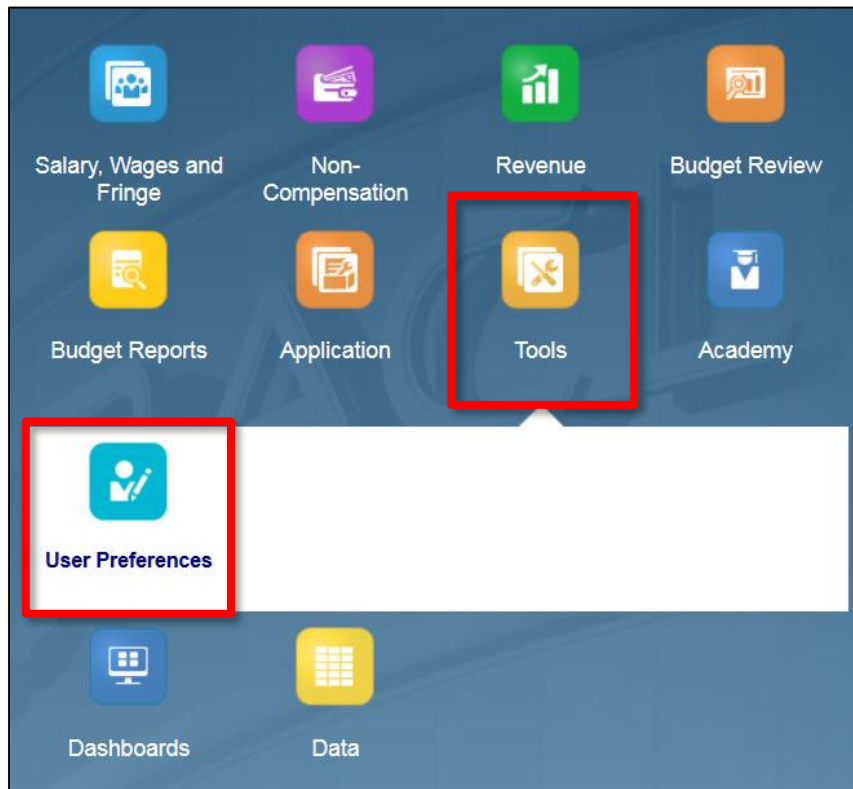
# Setting User Variables



# 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.

# Setting User Variables – Display Setting

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

**Preferences** Save

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

**Display**

**Number Formatting** ☐ Use Administrator's Settings

Thousands Separator	None
Decimal Separator	Dot
Negative Sign	Prefixed Minus
Negative Color	Black

**Page Options** ☐ Use Administrator's Settings

Indentation of Members	Indent level 0 members only
Number of Items on the Page Drop-down	100

# Setting User Variables – End Users

**User Preferences**

**Preferences**


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

**User Variables**

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

**Member Selectors**

**Save**

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**

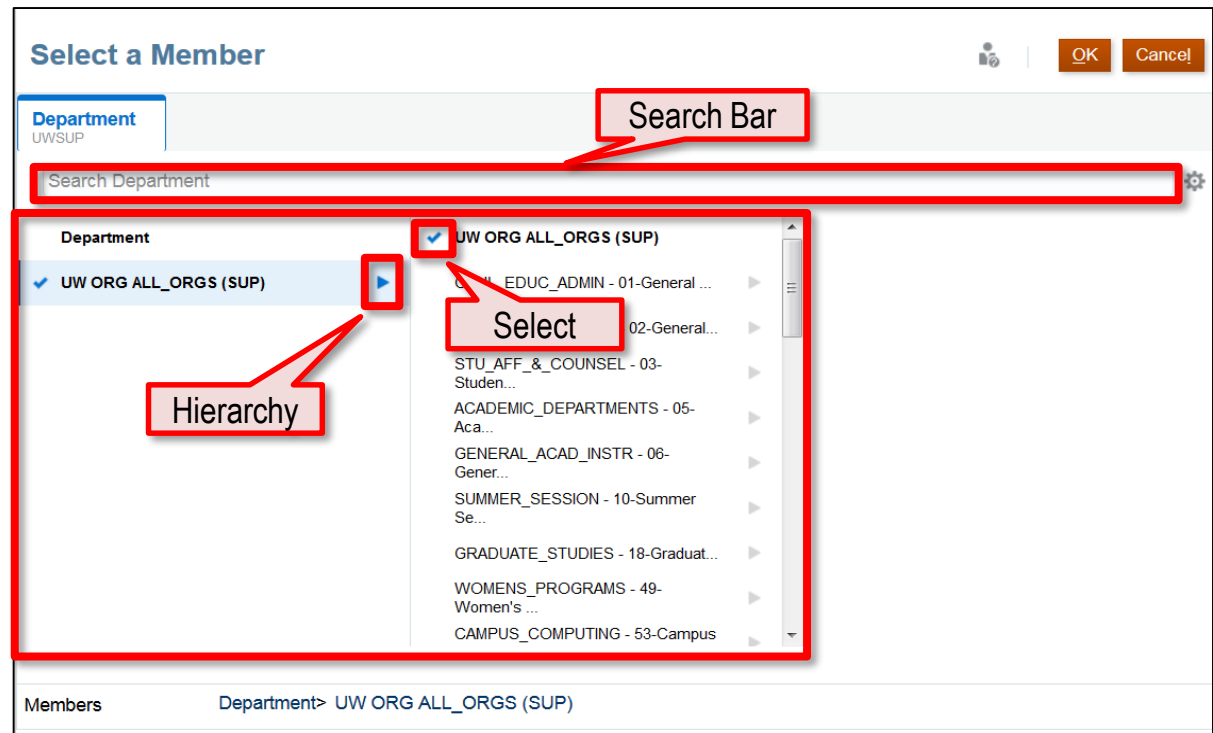
When selecting members through a Hierarchy, drill into a member by clicking 

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

**Select a Member**

Department  
CHANCELLOR - Chancellor's Office (GBY)

Search Department

All UWGBY ORGANIZATIONS (GBY)

- DIVISION\_01 - Chancellor's Ar...
- DIVISION\_03 - Athletics (GBY)
- DIVISION\_06 - Clinics and Fun...
- DIVISION\_09 - Intramurals (GBY)
- DIVISION\_12 - Academic Affair...
- DIVISION\_13 - Outreach (GBY)
- DIVISION\_14 - Enrollment Serv...
- DIVISION 18 - Student Affairs...
- DIVISION 24 - Science and Ter

DIVISION\_01 - Chancellor's Ar...

PLANNING\_BUDGET - Asst. Chanc...

AFFIRMATIVE\_ACTION - AFFIRMAT...

✓ CHANCELLOR - Chancellor's Off...

UNIVERSITY\_COUNSEL - Universi...

010100 - CHANC OFF\*ADMIN (GBY)

010110 - CHANC OFF\*CONT FUND ...

010115 - PROJECT COASTAL (GBY)

010120 - CHANCELLORS OFFICE-G...

010200 - Chancellors Search &...

Members  
Department> All UWGBY ORGANIZATIONS (GBY)> DIVISION\_01 - Chancellor's Area (GBY)

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.**

User Variables		
Dimension	User Variable	Member
Department	Bud Approval Institution	All UWGBY ORGANIZATIONS (GBY)
Department	User Institution	All UWGBY ORGANIZATIONS (GBY)

Did not update with new selection

# Budget Tasks in PlanUW



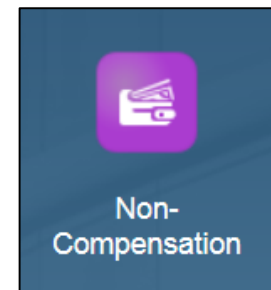
# PlanUW Tasks and Processes

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.

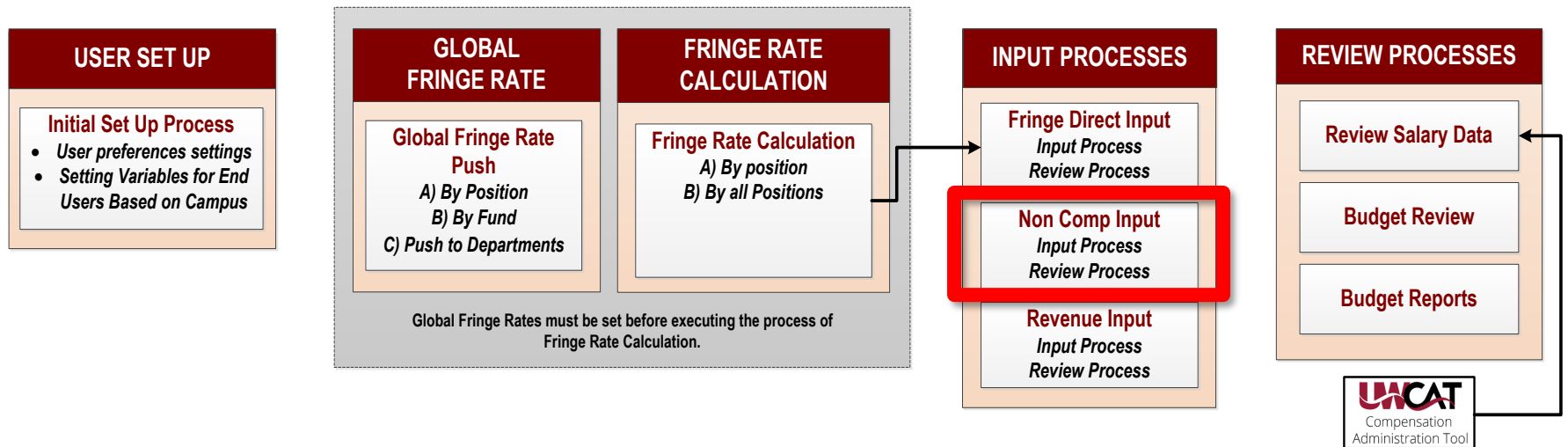
The processes we will focus on are as follows:

- ✓ 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



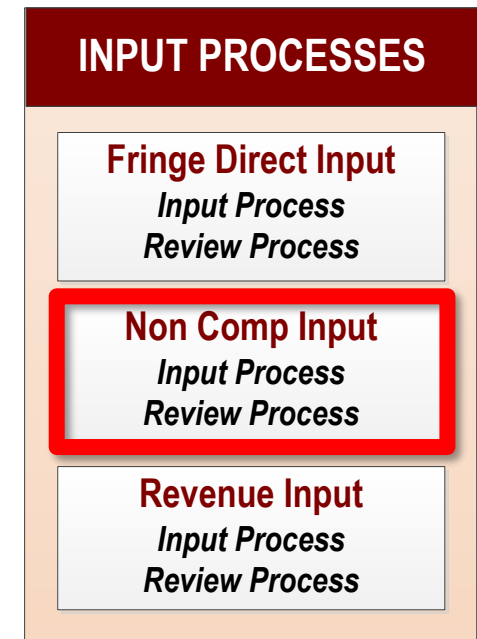
# Non Comp Input Process in Annual Budgeting Process



# Non Compensation Input Process

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

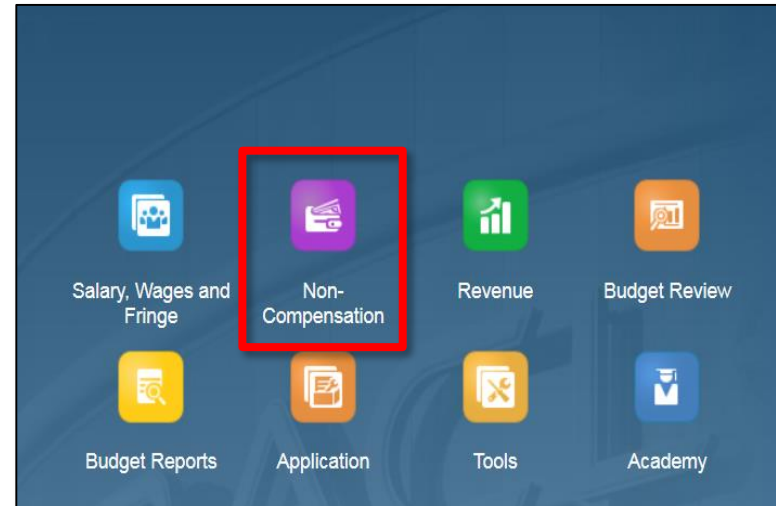
- This input process can take place at all three levels, **however we are only using Level 1 entry at UW-Madison for the FY20 budget process.**
- Input of budget data can take place in any of the following web forms:
  - By Department \*
  - By Program
  - By Department & Program \*
  - By Project
  - 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.





## 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

The screenshot displays the PlanUW interface with several key components highlighted by red boxes and callouts:

- Navigation Toolbar:** A horizontal bar at the top containing icons for Non-Compensation, Revenue, Budget Review, Budget Reports, Academy, Dashboards, Navigation Flows, Data, and Reports.
- Point of View:** A box highlighting the filter section on the left, showing 'Fund 101 - GPO - Doctoral Cluster', 'Program 2 - Instruction', and 'Project No Projects Madison'.
- Rows:** A box highlighting the list of budget items on the left, such as '070301 - ADMIN-ADMIN SVCS\*COMPUTING (MSN)' and '070406 - ADM-PROG DVLPMNT\*INST SUPRT (MSN)'.
- Columns:** A box highlighting the header row of the budget table, showing columns for '2018 - 2019', '2019 - 2020', and '2019 - 2020'.
- Data:** A box highlighting the main data entry area of the budget table.

The main data table structure is as follows:

	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 SUPRT (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			

# Navigation Toolbar

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

## NonComp Budget by Dept (L1)

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

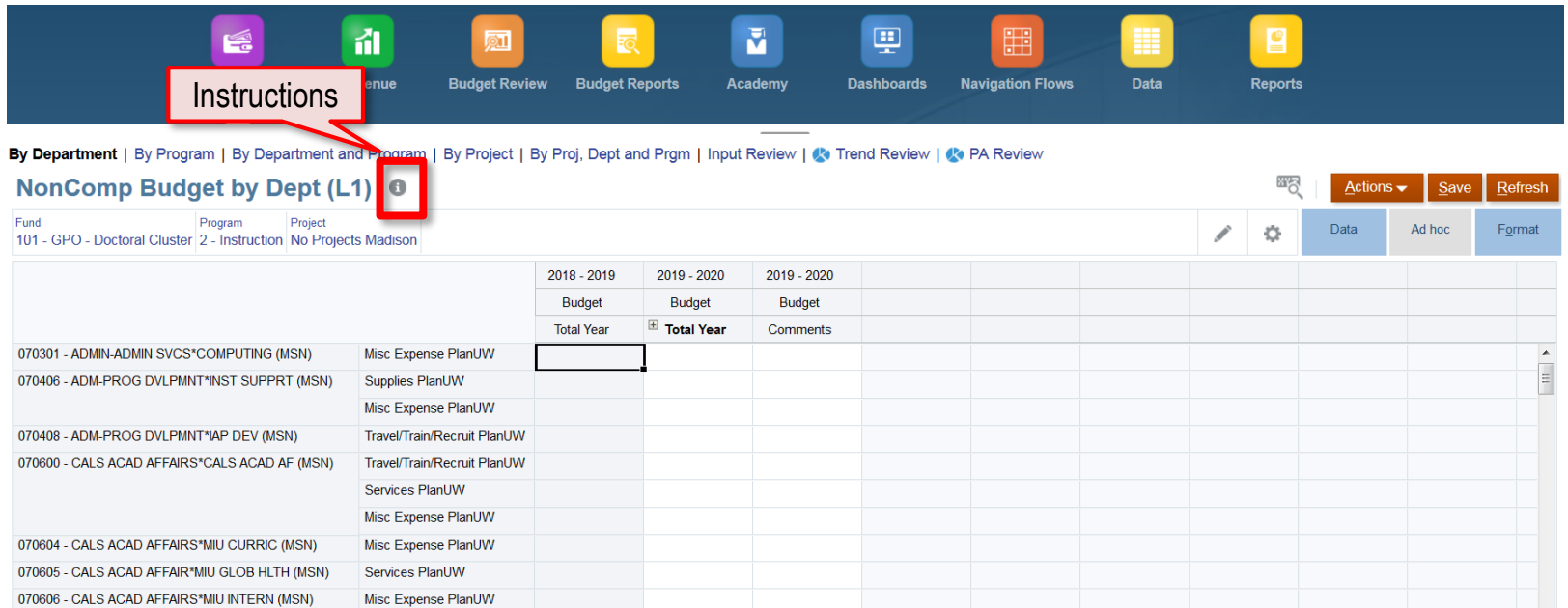
Actions | Save | Refresh

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									

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



Instructions

Revenue Budget Review Budget Reports Academy Dashboards Navigation Flows Data Reports


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

**NonComp Budget by Dept (L1)**

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

Actions Save Refresh

	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								

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

By Department | By Program | By Department and Program | By Project | By **Point of View** | End Review | PA Review

**NonComp Budget by Dept (L1)**

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

	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**.

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

# Editing the Point of View – Using the Pencil

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

## NonComp Budget by Dept (L1) ?

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

**Edit Members**

Actions Save Refresh

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									


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

# Editing the Point of View – Using the Pencil

The screenshot shows the 'NonComp Budget by Dept (L1)' interface. At the top is a navigation bar with icons for Non-Compensation, Revenue, Budget Review, Budget Reports, Academy, Dashboards, Navigation Flows, Data, and Reports. Below this is a filter bar with options: By Department, By Program, By Department and Program, By Project, By Proj, Dept and Prgm, Input Review, Trend Review, and PA Review. The main title is 'NonComp Budget by Dept (L1)'. Below the title is a table with columns for Fund, Program, Project, and Budget. The table shows data for '101 - GPO - Doctoral Cluster' and '2 - Instruction'. An 'Edit Members' window is open, showing a dropdown menu for the 'Fund' dimension. The dropdown is currently set to '101 - GPO - Doctoral Cluster'. A red box highlights the dropdown arrow, and a red arrow points to it with the label 'Dropdown'. The window also has 'Apply' and 'Cancel' buttons.

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

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

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

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

NonComp Budget by Dept (L1)

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

070301 - ADMIN-ADMIN SVCS\*COMPUTING (MSN) Misc Expense Plan

070406 - ADM-PROG DVLPMNT\*INST SUPPRT (MSN) Supplies PlanUW

070408 - ADM-PROG DVLPMNT\*IAP DEV (MSN) Travel/Train/Recruit PlanUW

070600 - CALS ACAD AFFAIRS\*CALS ACAD AFFAIRS (MSN) Misc Expense PlanUW

070604 - CALS ACAD AFFAIRS\*MIU CURRIC (MSN) Misc Expense PlanUW

Available Members

Fund 101 - GPO - Doctoral Cluster

Program 406 - Lawton Minority Undergraduate Grants Program

Project 601 - UW Hosp & Clinics Authority - Services Received

131 - Academic Student Fees

189 - Extension Student Fees

231 - Acad Stu Fees Carryforward Contributions

128 - Auxiliary Enterprises

228 - Auxiliary Enterprises - Capital Projects

136 - General Operations Receipts

150 - Fed aid - Federal Indirect Cost Reimbursement

Apply Cancel

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

The screenshot displays the 'NonComp Budget by Dept (L1)' interface. At the top, a navigation bar contains icons for Non-Compensation, Revenue, Budget Review, Budget Reports, Academy, Dashboards, Navigation Flows, Data, and Reports. Below this, a filter bar shows 'By Department' selected, with other options like 'By Program', 'By Department and Program', 'By Project', 'By Proj, Dept and Prgm', 'Input Review', 'Trend Review', and 'PA Review'. The main title is 'NonComp Budget by Dept (L1)'. A table lists budget items with columns for Fund, Program, and Project. A dropdown menu is open, showing a list of budget members. The 'Apply' button in the dropdown is highlighted with a red box and a red arrow pointing to it. The 'Apply' button in the top right corner is also highlighted with a red box and a red arrow pointing to it.

Fund	Program	Project
101 - GPO - Doctoral Cluster	2 - Instruction	No Projects Madison
070301 - ADMIN-ADMIN SVCS*COMPUTING (MSN)	Misc Expense Plan	
070406 - ADM-PROG DVLPMNT*INST SUPPRT (MSN)	Supplies 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	

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

# Editing the Point of View – Using the Pencil

The screenshot shows the 'NonComp Budget by Dept (L1)' interface. At the top is a navigation bar with icons for Non-Compensation, Revenue, Budget Review, Budget Reports, Academy, Dashboards, Navigation Flows, Data, and Reports. Below this is a filter bar with options: 'By Department', 'By Project', 'By Proj, Dept and Prgm', 'Input Review', 'Trend Review', and 'PA Review'. The main title is 'NonComp Budget by Dept (L1)'. Below the title is a table with columns: Fund, Program, and Project. The first row is highlighted with a red box and a callout bubble that says 'Fund has changed'. The first row contains the values: '131 - Academic Student Fees', 'Instruction', and 'No Projects Madison'. To the right of the table are buttons for 'Data', 'Ad hoc', and 'Format'. Below the table is a large grid with columns for '2018 - 2019', '2019 - 2020', and '2019 - 2020'. The first row of the grid is 'Budget', and the second row is 'Total Year'. The first column of the grid is 'Comments'. The first row of the grid is highlighted with a red box.

Fund	Program	Project
131 - Academic Student Fees	Instruction	No Projects Madison

	2018 - 2019	2019 - 2020	2019 - 2020
	Budget	Budget	Budget
	Total Year	Total Year	Comments
070600 - CALS ACAD AFFAIRS*CALS ACAD AF (MSN)	Travel/Train/Recruit PlanUW		
	Supplies PlanUW		
070630 - CALS ACAD AFFAIRS*SHORT C- G (MSN)	Travel/Train/Recruit PlanUW		
	Misc Expense PlanUW		
070631 - CALS ACAD AFFAIRS*SHORT C (MSN)	Travel/Train/Recruit PlanUW		
	Maint & Repairs PlanUW		
	Supplies PlanUW		
	Services PlanUW		
	Misc Expense PlanUW		

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

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

## NonComp Budget by Dept (L1)

Fund: 131 - Academic Student Fees | Program: 2 - Instruction | Project: No Projects Madison

Actions: Save Refresh

Data Ad hoc Format

	2018 - 2019	2019 - 2020	2019 - 2020					
	Budget	Budget	Budget					
	Total Year	Total Year	Comments					
070600 - CALS ACAD AFFAIRS*CALS ACAD AF (MSN)	Travel/Train/Recruit PlanUW							
	Supplies PlanUW							
070630 - CALS ACAD AFFAIRS*SHORT C- G (MSN)	Travel/Train/Recruit PlanUW							
	Misc Expense PlanUW							
070631 - CALS ACAD AFFAIRS*SHORT C (MSN)	Travel/Train/Recruit PlanUW							
	Maint & Repairs PlanUW							
	Supplies PlanUW							
	Services PlanUW							
	Misc Expense PlanUW							

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

**Select a Member**

Search Bar

Hierarchy

Fund	Fund Total	TUI
Fund Total	GPR/Tuition	✓ 131 - Academic Student Fees
	TUI	189 - Extension Student Fees
	TB	
	AUX	
	OP REC	
	FICR	
	GGC	
	OTHER	
	FFA	

Members Fund> Fund Total> TUI> 131 - Academic Student Fees

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

# Editing the Point of View – Clicking the POV

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

## NonComp Budget by Dept (L1)

Fund	Program	Project
131 - Academic Student Fees		
070600 - CALS ACAD AFFAIRS		
070630 - CALS ACAD AFFAIRS		
070631 - CALS ACAD AFFAIRS		
072000 - AG&APPLIED ECONS		
072020 - AG&APPLIED ECONS		
072060 - AG&APPLIED ECONS		

### Select a Member

OK Cancel

Fund  
"101 - GPO - Doctoral Cluster"

101 x 101

**Results**  
✓ 101 - GPO - Doctoral Cluster  
Selected 101 - GPO - Doctoral Cluster

Members Fund> 101 - GPO - Doctoral Cluster

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

# Editing the Point of View – Clicking the POV

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

## NonComp Budget

Fund  
131 - Academic Student Fees 2

### Select a Member

Search Fund

Fund	Fund Total	
Fund Total	GPR/Tuition	101 - GPO - Doctoral Cluster
	TUI	102 - GPO - Non-Doctoral Clus...
	TB	103 - GPO - Colleges
	AUX	104 - GPO - Extension Programs
	OP REC	106 - GPO - System Wide
	FICR	109 - Energy Costs
	GGC	110 - Principal Repayment and...
	OTHER	112 - Grants to Meet Emergenc...
	FFA	116 - Tommy G. Thompson Cente...
		117 - State Laboratory of Hvn

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

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

# Editing the Point of View – Clicking the POV

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

**NonComp Budget**

Fund  
131 - Academic Student Fees

**Select a Member** #1 OK Cancel

**Fund**  
"101 - GPO - Doctoral Cluster"

Search Fund

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

#2 ☒ 101 - GPO - Doctoral Cluster

102 - GPO - Non-Doctoral Clus...

103 - GPO - Colleges

104 - GPO - Extension Programs

106 - GPO - System Wide

109 - Energy Costs

110 - Principal Repayment and...

112 - Grants to Meet Emergenc...

116 - Tommy G. Thompson Cente...

117 - State Laboratory of Hvn

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

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

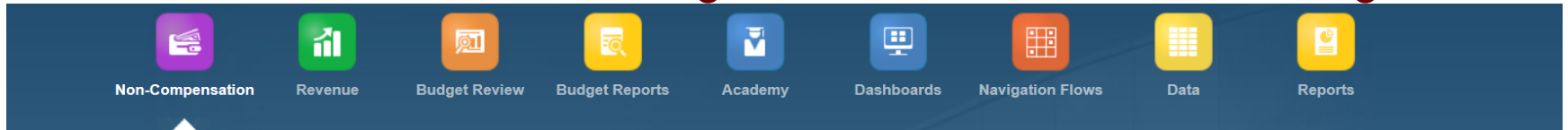
The screenshot displays the 'NonComp Budget by Dept (L1)' interface. At the top, a navigation bar contains icons for Non-Compensation, Revenue, Budget Review, Budget Reports, Academy, Dashboards, Navigation Flows, Data, and Reports. Below this, a filter bar shows various views: By Department, By Program, By Department and Program, By Project, By Proj, Dept and Prgm, Input Review, Trend Review, and PA Review. The main title is 'NonComp Budget by Dept (L1)'. Below the title, a table header shows 'Fund 101 - GPO - Doctoral Cluster', 'Program - Instruction', and 'Project No Projects Madison'. A red box highlights the 'Fund' column, and a red arrow points to the right arrow icon in the table header. The table has columns for '2018 - 2019 Budget', '2019 - 2020 Budget', and '2019 - 2020 Comments'. The table lists various budget items for different departments, including '070600 - CALS ACAD AFFAIRS\*CALS ACAD AF (MSN)', '070630 - CALS ACAD AFFAIRS\*SHORT C- G (MSN)', and '070631 - CALS ACAD AFFAIRS\*SHORT C (MSN)'. The '2018 - 2019 Budget' column is highlighted in yellow.

Fund	Program	Project	2018 - 2019 Budget	2019 - 2020 Budget	2019 - 2020 Comments
101 - GPO - Doctoral Cluster	- Instruction	No Projects Madison			
070600 - CALS ACAD AFFAIRS*CALS ACAD AF (MSN)	Travel/Train/Recruit PlanUW				
	Supplies PlanUW				
070630 - CALS ACAD AFFAIRS*SHORT C- G (MSN)	Travel/Train/Recruit PlanUW				
	Misc Expense PlanUW				
070631 - CALS ACAD AFFAIRS*SHORT C (MSN)	Travel/Train/Recruit PlanUW				
	Maint & Repairs PlanUW				
	Supplies PlanUW				
	Services PlanUW				
	Misc Expense PlanUW				

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



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

## NonComp Budget by Dept (L1) ⓘ

Fund 101 - GPO - Doctoral Cluster		Program 2 - Instruction		Project 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 SUPRT (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											

# Level Entry – We Are Using Level 1

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

## NonComp Budget by Dept (L1) ⓘ

Actions Save Refresh

Fund Program Project

101 - GPO - Doctoral Cluster 2 - Instruction No Projects Madison

	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								

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

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

## NonComp Budget by Dept (L1) ⓘ

Fund 102 - GPO - Non-Doctoral Cluster | Program 2 - Instruction | Project No Project

Actions Save Refresh

Data Ad hoc Format

		2017 - 2018	2018 - 2019	2018 - 2019						
		Budget	Budget							
		Total Year	Total Year							
110120 - CON Innovation Award (OSH)	Travel/Training/Recruiting PlanUW									
	Maint & Repairs PlanUW		50000							
	Utilities PlanUW		219							
	Supplies PlanUW		10000							
	Services PlanUW									
	Miscellaneous Expense PlanUW		1500							
	Equipment PlanUW		26782							
	Miscellaneous Capital Expense PlanUW		2000							
	5708 - Aids to Organizations		1785							
	5750 - Student Loans									

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

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

## NonComp Budget by Dept (L1) ?

Fund: 102 - GPO - Non-Doctoral Cluster | Program: 2 - Instruction | Project: No Project

Actions ▼ **Save** Refresh

Data Ad hoc Format

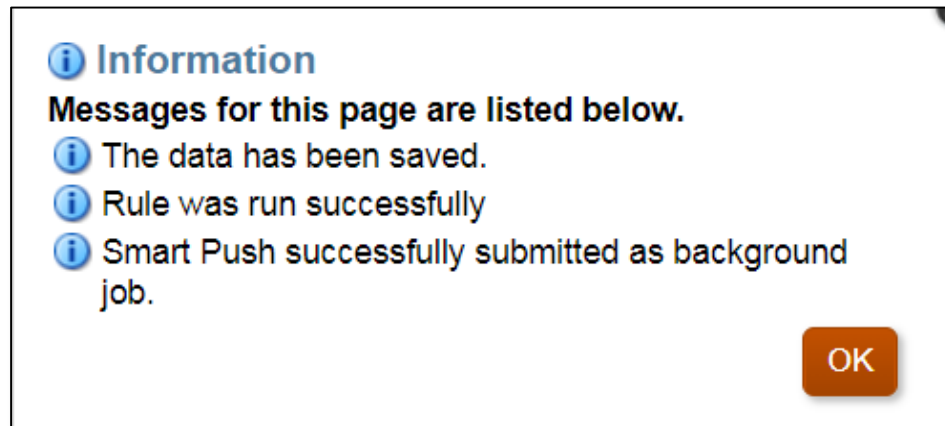
**Save**

	2017 - 2018	2018 - 2019	2018 - 2019						
	Budget	Budget	Budget						
	Total Year	Total Year	Comments						
110120 - CON Innovation Award (OSH)									
Travel/Training/Recruiting PlanUW									
Maint & Repairs PlanUW		50000							
Utilities PlanUW		219							
Supplies PlanUW		10000							
Services PlanUW									
Miscellaneous Expense PlanUW		1500							
Equipment PlanUW		26782							
Miscellaneous Capital Expense PlanUW		2000							
5708 - Aids to Organizations		1785							
5750 - Student Loans									

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

**i** **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

The screenshot shows the 'NonComp Budget by Dept (L1)' interface. At the top, there is a navigation bar with icons for Non-Compensation, Revenue, Budget Review, Budget Reports, Academy, Dashboards, and Data. Below this is a breadcrumb trail: 'By Department' (highlighted with a red box and callout 1), 'By Program', 'By Department and Program', 'By Project', 'By Proj, Dept and Prgm', 'Input Review', 'Trend Review', and 'PA Review'. The main title 'NonComp Budget by Dept (L1)' is also highlighted with a red box and callout 2. Below the title, there is a table with columns for Fund, Program, Project, and Budget. The first row of the table is highlighted with a red box and callout 3, showing '101 - GPO - Doctoral Cluster', '1 - Institutional Support', and 'No Projects Madison'. To the right of the table, there is a dropdown menu for 'Fund' (101 - GPO - Doctoral Cluster), a dropdown for 'Program' (1 - Institutional Support), and a dropdown for 'Project' (No Projects Madison). These dropdowns are highlighted with red boxes and callouts 1, 2, and 3 respectively. To the right of the dropdowns, there is an 'Apply' button (highlighted with a red box and callout 4) and a 'Cancel' button. The table itself has columns for '2018 - 2019', '2019 - 2020', and '2019 - 2021'. The rows are grouped by 'Fund' and 'Program', with 'Project' listed for each. The first group is '011000 - UNIVERSITY ADMIN\*ADMIN (MSN)', followed by '011010 - UNIVERSITY ADMIN\*CHAN OFC (MSN)', and '011020 - UNIVERSITY ADMIN\*PROVOST (MSN)'. Each group has a list of projects: 'Travel/Train/Recruit PlanUW', 'Misc Expense PlanUW', 'Maint & Repairs PlanUW', 'Supplies PlanUW', and 'Services PlanUW'.

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

The screenshot shows the 'NonComp Budget by Dept (L1)' interface. At the top, there is a navigation bar with icons for Non-Compensation, Revenue, Budget Review, Budget Reports, Academy, Dashboards, and Data. Below this is a breadcrumb trail: 'By Department | By Program | By Department and Program | By Project | By Proj, Dept and Prgm | Input Review | Trend Review | PA Review'. The main title is 'NonComp Budget by Dept (L1)'. On the right, there are 'Actions' buttons: 'Save' and 'Refresh'. The main table has columns for Fund, Program, Project, and Budget. The 'Budget' column is further divided into '2018 - 2019', '2019 - 2020', and '2019 - 2020'. The '2018 - 2019' column has sub-columns for 'Budget' and 'Total Year'. The '2019 - 2020' column has sub-columns for 'Budget' and 'Comments'. The table lists several departments, including '011000 - UNIVERSITY ADMIN\*ADMIN (MSN)', '011010 - UNIVERSITY ADMIN\*CHAN OFC (MSN)', and '011020 - UNIVERSITY ADMIN\*PROVOST (MSN)'. A red box highlights the 'Total Year' column for the '011020' department, which contains the value '10,000'. Another red box highlights the 'Budget' column for the '011020' department, which contains the value '10,000'. A third red box highlights the 'Comments' column for the '011020' department, which is empty. A fourth red box highlights the 'Save' button in the top right corner.

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

2 NonComp Budget by Dept (L1)

3 Actions Save Refresh

4

Fund	Program	Project	Budget		
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				

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.



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

<a href="#">By Department</a>   <a href="#">By Program</a>   <a href="#">By Department and Program</a>   <a href="#">By Project</a>   <a href="#">By Proj, Dept and Prgm</a>   <a href="#">Input Review</a>   <a href="#">Trend</a>			
NonComp Budget by Dept (L1) <i>Information</i>			
Fund	Program	Project	
101 - GPO - Doctoral Cluster	1 - Institutional Support	No Projects Madison	
		2018 - 2019	2019 - 2020
		Budget	Budget
		Total Year	Total Year
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



# Reviewing Non Comp Data

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

Actions Save Refresh

Data Ad hoc Fgmat

	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							
<b>Salary, Wages &amp; Fringe</b>	<b>1,482,893</b>	<b>1,556,481</b>	<b>688,917</b>	<b>1,423,800</b>	<b>1,423,800</b>	<b>0</b>							
3790 - Material for Resale													
Travel/Train/Recruit PlanUW					10,000	10,000							
<b>Travel/Training/Recruiting</b>	<b>17,258</b>	<b>26,094</b>	<b>9,329</b>		<b>10,000</b>	<b>10,000</b>							

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 011020 - UNIVERSITY ADMIN*PROVOST (MSN)	Fund 101 - GPO - Doctoral Cluster	Program 1 - Institutional Support	Project No Projects Madison					
	2016 - 2017	2017 - 2018	2018 - 2019	2018 - 2019	2019 - 2020	2019 - 2020	2019 - 2020	
	Actual	Actual	Actual	Budget	Budget	CY vs. PY Budget (\$)	Budget	
	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 011020 - UNIVERSITY ADMIN*PROVOST (MSN)	Fund 101 - GPO - Doctoral Cluster	Program 1 - Institutional Support	Project No Projects Madison				
	2016 - 2017 Actual	2017 - 2018 Actual	2018 - 2019 Actual	2018 - 2019 Budget	2019 - 2020 Budget	2019 - 2020 CY vs. PY Budget (\$)	2019 - 2020 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	
<b>Salary, Wages &amp; Fringe</b>	<b>1,482,893</b>	<b>1,556,481</b>	<b>688,917</b>	<b>1,423,800</b>	<b>1,423,800</b>	<b>0</b>	
3790 - Material for Resale							
Travel/Train/Recruit PlanUW					10,000	10,000	
<b>Travel/Training/Recruiting</b>	<b>17,258</b>	<b>26,094</b>	<b>9,329</b>		<b>10,000</b>	<b>10,000</b>	
Maint & Repairs PlanUW							
<b>Maint &amp; Repairs</b>	<b>3,012</b>	<b>4,095</b>	<b>2,087</b>				
Utilities PlanUW							
<b>Utilities</b>							
Supplies PlanUW							
<b>Supplies</b>	<b>5,914</b>	<b>6,186</b>	<b>3,395</b>				
Services PlanUW							
<b>Services</b>	<b>23,263</b>	<b>11,217</b>	<b>3,758</b>				
Misc Expense PlanUW							
<b>Miscellaneous Expense</b>	<b>24,009</b>	<b>11,905</b>	<b>4,705</b>				
<b>Supplies and Expense</b>	<b>73,457</b>	<b>59,496</b>	<b>23,274</b>	<b>79,445</b>	<b>10,000</b>	<b>(69,445)</b>	

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.

**C 37**

# 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)



Actions

Save

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		
<input checked="" type="checkbox"/> <b>Salary, Wages &amp; Fringe</b>				<b>1,482,893</b>	<b>1,556,481</b>	<b>688,917</b>	<b>1,423,800</b>	<b>1,423,800</b>	<b>0</b>		
3790 - Material for Resale											
Travel/Train/Recruit PlanUW								10,000	10,000		
<input checked="" type="checkbox"/> <b>Travel/Training/Recruiting</b>				<b>17,258</b>	<b>26,094</b>	<b>9,329</b>		<b>10,000</b>	<b>10,000</b>		
Maint & Repairs PlanUW								3,000			
<input checked="" type="checkbox"/> <b>Maint &amp; Repairs</b>				<b>3,012</b>	<b>4,095</b>	<b>2,087</b>					
Utilities PlanUW											

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   <b>Input Review</b>   Trend Review   PA Review							
<b>NonComp Rollup Review (L1)</b>							
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	
<b>Salary, Wages &amp; Fringe</b>	<b>1,482,893</b>	<b>1,556,481</b>	<b>688,917</b>	<b>1,423,800</b>	<b>1,423,800</b>	<b>0</b>	
3790 - Material for Resale							
Travel/Train/Recruit PlanUW					10,000	10,000	
<b>Travel/Training/Recruiting</b>	<b>17,258</b>	<b>26,094</b>	<b>9,329</b>		<b>10,000</b>	<b>10,000</b>	
Maint & Repairs PlanUW					3,000	3,000	
<b>Maint &amp; Repairs</b>	<b>3,012</b>	<b>4,095</b>	<b>2,087</b>		<b>3,000</b>	<b>3,000</b>	
Utilities PlanUW							
<b>Utilities</b>							
Supplies PlanUW							
<b>Supplies</b>	<b>5,914</b>	<b>6,186</b>	<b>3,395</b>				
Services PlanUW							
<b>Services</b>	<b>23,263</b>	<b>11,217</b>	<b>3,758</b>				
Misc Expense PlanUW							
<b>Miscellaneous Expense</b>	<b>24,009</b>	<b>11,905</b>	<b>4,705</b>				
<b>Supplies and Expense</b>	<b>73,457</b>	<b>59,496</b>	<b>23,274</b>	<b>79,445</b>	<b>13,000</b>	<b>(66,445)</b>	

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.

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

		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	<b>Revenue</b>								
Program Total	<b>Permanent FTE</b>						10		10
	<b>Graduate Asst FTE</b>								
Program Total	<b>Fringe</b>				0				0
	<b>Salary</b>	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	<b>Aid to Individuals &amp; Organizations</b>				0				0
	<b>Capital Expense</b>				0				0
	<b>Debt Service</b>								
	<b>Supplies and Expense</b>	73,457	65,072	23,274	79,445		13,000		(66,445)
	<b>Sales Credits</b>				0				0
	<b>Special Purpose</b>				0				0



# 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

<div> <div>Non-Compensation</div> <div>Revenue</div> <div>Budget Review</div> <div>Budget Reports</div> <div>Academy</div> <div>Dashboards</div> <div>Data</div> </div>						
<div> <div>1</div> <div>2</div> <div>3</div> </div>						
<div> <div>By Department   By Program   By Department and Program   By Project   By Proj, Dept and Prgm   <b>Input Review</b>   <b>Trend Review</b>   <b>By Project</b></div> </div>						
<div> <div>Consolidated Review Yearly Trend</div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> </div>						
<div> <div>Department</div> <div>011020 - UNIVERSITY ADMIN*PROVOST (MSN)</div> <div>Fund</div> <div>101 - GPO - Doctoral Cluster</div> <div>Project</div> <div>No Projects Madison</div> <div> <div>Actions</div> <div>Save</div> <div>Refresh</div> </div> </div>						
<div> <div> <div>2016 - 2017</div> <div>2017 - 2018</div> <div>2018 - 2019</div> <div>2018 - 2019</div> <div>2018 - 2019</div> <div>2019 - 2020</div> <div>2019 - 2020</div> </div> </div>						
<div> <div>Actual</div> <div>Actual</div> <div>Actual</div> <div>Budget</div> <div>Budget</div> <div>Budget</div> <div>CY vs. PY Budget (\$)</div> </div>						
<div> <div>Final</div> <div>Final</div> <div>Final</div> <div>Final</div> <div>Revised Budget</div> <div>Working</div> <div>Working</div> </div>						
<div> <div>Total Year</div> <div>Total Year</div> <div>Nov YTD</div> <div>Total Year</div> <div>Total Year</div> <div>Total Year</div> <div>Total Year</div> </div>						
<div> <div>Program Total</div> <div>Revenue</div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>						
<div> <div>Program Total</div> <div>Permanent FTE</div> <div></div> <div></div> <div></div> <div>10</div> <div>10</div> </div>						
<div> <div>Program Total</div> <div>Graduate Asst FTE</div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>						
<div> <div>Program Total</div> <div>Fringe</div> <div></div> <div></div> <div>0</div> <div></div> <div>0</div> </div>						
<div> <div>Program Total</div> <div>Salary</div> <div>1,482,893</div> <div>1,556,481</div> <div>688,917</div> <div>1,423,800</div> <div>1,423,800</div> </div>						
<div> <div>Program Total</div> <div>Salary, Wages &amp; Fringe</div> <div>1,482,893</div> <div>1,556,481</div> <div>688,917</div> <div>1,423,800</div> <div>1,423,800</div> </div>						
<div> <div>Program Total</div> <div>Aid to Individuals &amp; Organizations</div> <div></div> <div></div> <div>0</div> <div></div> <div>0</div> </div>						
<div> <div>Program Total</div> <div>Capital Expense</div> <div></div> <div></div> <div>0</div> <div></div> <div>0</div> </div>						
<div> <div>Program Total</div> <div>Debt Service</div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>						
<div> <div>Program Total</div> <div>Supplies and Expense</div> <div>73,457</div> <div>65,072</div> <div>23,274</div> <div>79,445</div> <div>13,000</div> </div>						
<div> <div>Program Total</div> <div>Sales Credits</div> <div></div> <div></div> <div>0</div> <div></div> <div>0</div> </div>						
<div> <div>Program Total</div> <div>Special Purpose</div> <div></div> <div></div> <div>0</div> <div></div> <div>0</div> </div>						
<div> <div>Program Total</div> <div></div> <div></div> <div></div> <div></div> <div></div> <div>(66,445)</div> </div>						

# 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.

The screenshot displays the 'Trend Review' interface. At the top, there are four icons: 'Non-Compensation' (purple), 'Revenue' (green), 'Budget Review' (orange), and 'Budget Reports' (yellow). Below these, a navigation bar shows various filters: 'By Department', 'By Program', 'By Department and Program', 'By Project', 'By Proj, Dept and Prgm', 'Input Review', and 'Trend Review'. The main title is 'Consolidated Review Yearly Trend'. Below this, there are three tabs: 'Department' (selected), 'Fund', and 'Project'. The 'Department' tab shows 'ALL\_MSN\_DEPTIDS - ALL OF UWMSN DEPARTMENT IDS (MSN)'. The 'Fund' tab shows '128 - Auxiliary Enterprises'. The 'Project' tab shows 'No Projects Madison'. The table below shows the 'Program Total' row with a red box around the 'Revenue' column header. The table has four columns: '2016 - 2017', '2017 - 2018', and '2018 - 2019'. The rows are 'Actual', 'Final', 'Total Year', and 'Nov YTD'. The values for the 'Program Total' row are: 294,659,727 for 2016-2017, 323,875,246 for 2017-2018, and 228,968,671 for 2018-2019.

	2016 - 2017	2017 - 2018	2018 - 2019
Actual		Actual	Actual
Final		Final	Final
Total Year		Total Year	Nov YTD
Program Total	294,659,727	323,875,246	228,968,671

# 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 “-”

Non-Compensation
Revenue
Budget Review
Budget Report

[By Department](#) | [By Program](#) | [By Department and Program](#) | [By Project](#) | [By Proj, Dept and Prgm](#) | [Input Review](#) | [Trend Review](#)

## Consolidated Review Yearly Trend i

Department ALL_MSN_DEPTIDS - ALL OF UWMSN DEPARTMENT IDS (MSN)	Fund 128 - Auxiliary Enterprises	Project No Projects Madison
	2016 - 2017	2017 - 2018
	Actual	Actual
	Final	Final
	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
⊕ Housing Revenue		
⊕ Misc Fee	743,466	2,015,083
⊕ Misc. Revenue	279,362,380	321,726,378
⊕ Parking Revenue	12,500,289	13,577,929
⊕ Segregated Fees	45,327,891	49,814,353
⊕ Textbook Sales & Rental		155,031
⊕ Transfers (Revenue)	(46,039,977)	(65,423,598)
⊕ Tuition	1,964,580	0
⊖ Revenue	294,659,727	323,875,246

# 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):

<div> <div>Non-Compensation</div> <div>Revenue</div> <div>Budget Review</div> <div>Budget Reports</div> <div>Academy</div> <div>Dashboards</div> <div>Data</div> </div>								
<div> <div>1</div> <div>2</div> <div>3</div> </div>								
<div> <div>By Department   By Program   By Department and Program   By Project   By Proj, Dept and Prgm   Input Review   <b>Trend Review</b>   PA Review</div> </div>								
<div> <div>Consolidated Review Yearly Trend</div> </div>								
<div> <div>Department</div> <div>01 - GENERAL EDUCATIONAL ADMIN (MSN)</div> </div>		<div> <div>Fund</div> <div>Fund Total</div> </div>		<div> <div>Project</div> <div>Madison Project Total</div> </div>				
				2016 - 2017	2017 - 2018	2018 - 2019	2018 - 2019	2018 - 2019
				Actual	Actual	Actual	Budget	Budget
				Final	Final	Final	Final	Revised Budget
				Total Year	Total Year	Nov YTD	Total Year	Total Year
Program Total		Revenue		5,648,546	5,851,353	(73,910)		
Program Total		Permanent FTE						40
		Graduate Asst FTE						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	0
Program Total		Salary, Wages & Fringe		6,050,719	6,115,330	3,027,175	5,086,259	(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
		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).

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**

Years: 2019 - 2020
Period: Total Year
Project: Madison Project

Department: 0110 - UNIVERSITY ADMIN (MSN)
Fund: 101 - GPO - Doctoral Cluster

Settings
Print
Refresh

**PA Review By Account**

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

**PA Review By Program**

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

# 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	PA - Budget Allocation	Allocation Target vs Budget (\$)
	Working Program Total	Final No Program	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			
<b>Program Total</b>	<b>+ Expenses</b>	<b>3,520,086</b>	<b>5,025,906</b>	<b>(1,505,820)</b>

# 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.

Non-Compensation Revenue Budget Review Budget Reports Academy

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

### NonComp Budget by Prgm (L1)

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

		2018 - 2019	2019 - 2020	2019 - 2020				
		Budget	Budget	Budget				
		Total Year	Total Year	Comments				
Travel/Train/Recruit PlanUW	0 - Student Services							
	1 - Institutional Support		10,000					
Maint & Repairs PlanUW	1 - Institutional Support		3,000					
Supplies PlanUW	1 - Institutional Support							
Services PlanUW	1 - Institutional Support							
Misc Expense PlanUW	1 - Institutional Support							

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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.

[illegible]

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: 101 - GPO - Doctoral Cluster Project: 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						

## 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.

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)

Actions Save Refresh

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		5,000	
		Maint & Repairs PlanUW		5,000	
		Supplies PlanUW			
		Services PlanUW			
		Misc Expense PlanUW			

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](mailto: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-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 Proj (L1)

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

		2018 - 2019	2019 - 2020	2019 - 2020						
		Budget	Budget	Budget						
		Total Year	Total Year	Comments						
No Projects Madison	Travel/Train/Recruit PlanUW		10,000							
	Maint & Repairs PlanUW		3,000							
	Supplies PlanUW									
	Services PlanUW									
	Misc Expense PlanUW									
AAB4956	Travel/Train/Recruit PlanUW									
	Supplies PlanUW									
	Services PlanUW									
	Misc Expense 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.

The screenshot shows the 'NonComp Budget by Proj (L1)' interface. At the top, there is a navigation bar with icons for Non-Compensation, Revenue, Budget Review, Budget Reports, Academy, Dashboards, and Data. Below this is a breadcrumb trail: 'By Department | By Program | By Department and Program | **By Project** | By Proj, Dept and Prgm | Input Review | Trend Review | PA Review'. The 'By Project' link is highlighted with a red box and labeled '1'. Below the breadcrumb trail is the title 'NonComp Budget by Proj (L1)'. To the right of the title are buttons for 'Actions', 'Save', and 'Refresh'. The 'Save' button is highlighted with a red box and labeled '3'. Below the title is a table with columns for Department, Fund, and Program. The first row is highlighted with a red box and labeled '2'. The table has a header row with columns for '2018 - 2019', '2019 - 2020', and '2019 - 2020'. Below the header row are rows for 'Budget', 'Total Year', and 'Comments'. The table contains data for 'No Projects Madison' and 'AAB4956'. The 'Total Year' for 'AAB4956' is highlighted with a red box and labeled '2'. The 'Save' button is also highlighted with a red box and labeled '3'.

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

	2018 - 2019	2019 - 2020	2019 - 2020
	Budget	Budget	Budget
	Total Year	Total Year	Comments
No Projects Madison			
Travel/Train/Recruit PlanUW		10,000	
Maint & Repairs PlanUW		3,000	
Supplies PlanUW			
Services PlanUW			
Misc Expense PlanUW			
AAB4956		10,000	
Travel/Train/Recruit PlanUW			
Supplies PlanUW			
Services PlanUW			
Misc Expense PlanUW			

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   <b>Input Review</b>   Trend Review   PA Review							
<b>NonComp Rollup Review (L1)</b>							
Department 011020 - UNIVERSITY ADMIN*PROVOST (MSN)	Fund 101 - GPO - Doctoral Cluster	Program 1 - Institutional Support	Project No Projects Madison				
	2016 - 2017	2017 - 2018	2018 - 2019	2018 - 2019	2019 - 2020	2019 - 2020	2019 - 2020
	Actual	Actual	Actual	Budget	Budget	CY vs. PY Budget (\$)	Budget
	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	
<b>Salary, Wages &amp; Fringe</b>	<b>1,482,893</b>	<b>1,556,481</b>	<b>688,917</b>	<b>1,423,800</b>	<b>1,423,800</b>	<b>0</b>	
3790 - Material for Resale							
Travel/Train/Recruit PlanUW					10,000	10,000	
<b>Travel/Training/Recruiting</b>	<b>17,258</b>	<b>26,094</b>	<b>9,329</b>		<b>10,000</b>	<b>10,000</b>	
Maint & Repairs PlanUW					3,000	3,000	
<b>Maint &amp; Repairs</b>	<b>3,012</b>	<b>4,095</b>	<b>2,087</b>		<b>3,000</b>	<b>3,000</b>	
Utilities PlanUW							
<b>Utilities</b>							
Supplies PlanUW							
<b>Supplies</b>	<b>5,914</b>	<b>6,186</b>	<b>3,395</b>				
Services PlanUW							
<b>Services</b>	<b>23,263</b>	<b>11,217</b>	<b>3,758</b>				
Misc Expense PlanUW							
<b>Miscellaneous Expense</b>	<b>24,009</b>	<b>11,905</b>	<b>4,705</b>				
<b>Supplies and Expense</b>	<b>73,457</b>	<b>59,496</b>	<b>23,274</b>	<b>79,445</b>	<b>13,000</b>	<b>(66,445)</b>	

# Non Comp Input Process – [L1] – By Project

Selecting a project in the Input Review POV

The screenshot shows a 'Select a Member' dialog box. At the top right, there are 'OK' and 'Cancel' buttons. On the left, a 'Project' tab is selected, showing 'AAB4956'. Below this is a search bar labeled 'Search Project'. The main area is a tree view with three levels: 'Project Total', 'Madison Project Total', and 'PJCT\_MSN\_01'. Under 'PJCT\_MSN\_01', the project 'AAB4956' is selected and highlighted with a checkmark. The breadcrumb at the bottom reads: 'Members > Project > Project Total > Madison Project Total > PJCT\_MSN\_01 > AAB4956'.

Project Total	Madison Project Total	PJCT_MSN_01
▶ Madison Project Total ▶	No Projects Madison	✓ AAB4956
	PJCT_MSN_01 ▶	
	PJCT_MSN_02 ▶	
	PJCT_MSN_03 ▶	
	PJCT_MSN_04 ▶	
	PJCT_MSN_07 ▶	
	PJCT_MSN_10 ▶	
	PJCT_MSN_12 ▶	
	PJCT_MSN_17 ▶	

Members > Project > Project Total > Madison Project Total > PJCT\_MSN\_01 > AAB4956




# 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: 011020 - UNIVERSITY ADMIN\*PROVOST (MSN) | Fund: 101 - GPO - Doctoral Cluster | Program: 1 - Institutional Support | **Project: AAB4956** | 

**Navigation Bar:** Non-Compensation | Revenue | Budget Review | Budget Reports | Academy | Dashboard

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

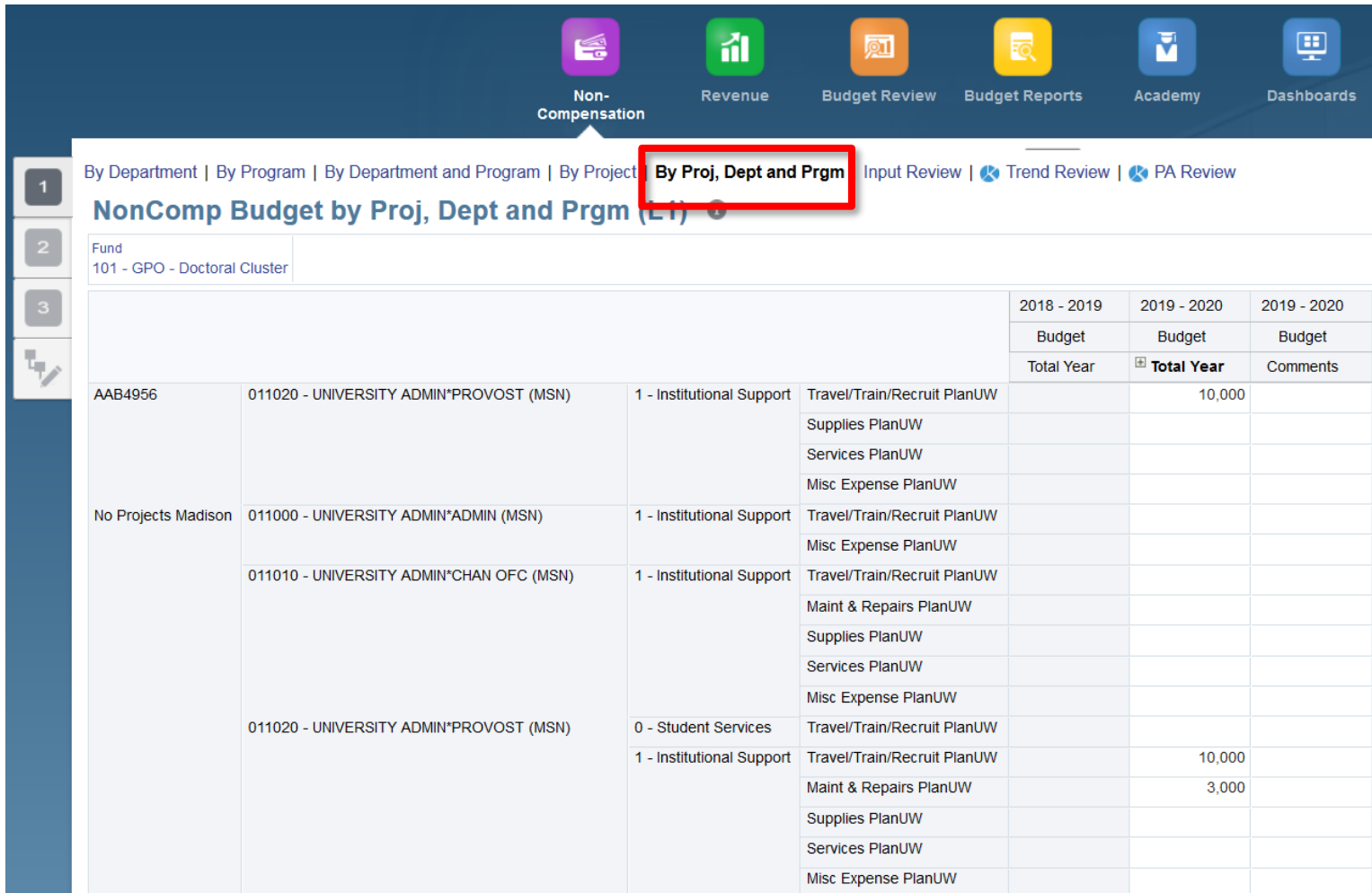
### NonComp Rollup Review (L1)

Department: 011020 - UNIVERSITY ADMIN\*PROVOST (MSN) | Fund: 101 - GPO - Doctoral Cluster | Program: 1 - Institutional Support | **Project: 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	
<b>Salary, Wages &amp; Fringe</b>	3,347				0	0	
3790 - Material for Resale							
Travel/Train/Recruit PlanUW					10,000	10,000	
<b>Travel/Training/Recruiting</b>	7,291	11,003	4,839		10,000	10,000	
Maint & Repairs PlanUW							
<b>Maint &amp; Repairs</b>							
Utilities PlanUW							
<b>Utilities</b>							
Supplies PlanUW							
<b>Supplies</b>		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	2019 - 2020	2019 - 2020		
					Budget	Budget	Budget		
					Total Year	Total Year	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								
	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									

# 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.

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

### NonComp Budget by Proj, Dept and Prgm (L1)

Fund  
101 - GPO - Doctoral Cluster

				2018 - 2019	2019 - 2020	2019 - 2020							
				Budget	Budget	Budget							
				Total Year	Total Year	Comments							
AAB4956	011020 - UNIVERSITY ADMIN*PROVOST (MSN)	1 - Institutional Support	Travel/Train/Recruit PlanUW		10,000								
			Supplies PlanUW										
			Services PlanUW		50,000								
			Misc Expense PlanUW										
No Projects Madison	011000 - UNIVERSITY ADMIN*ADMIN (MSN)	1 - Institutional Support	Travel/Train/Recruit PlanUW										
			Misc Expense PlanUW										

Actions Save Refresh

Data Ad hoc Format

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.

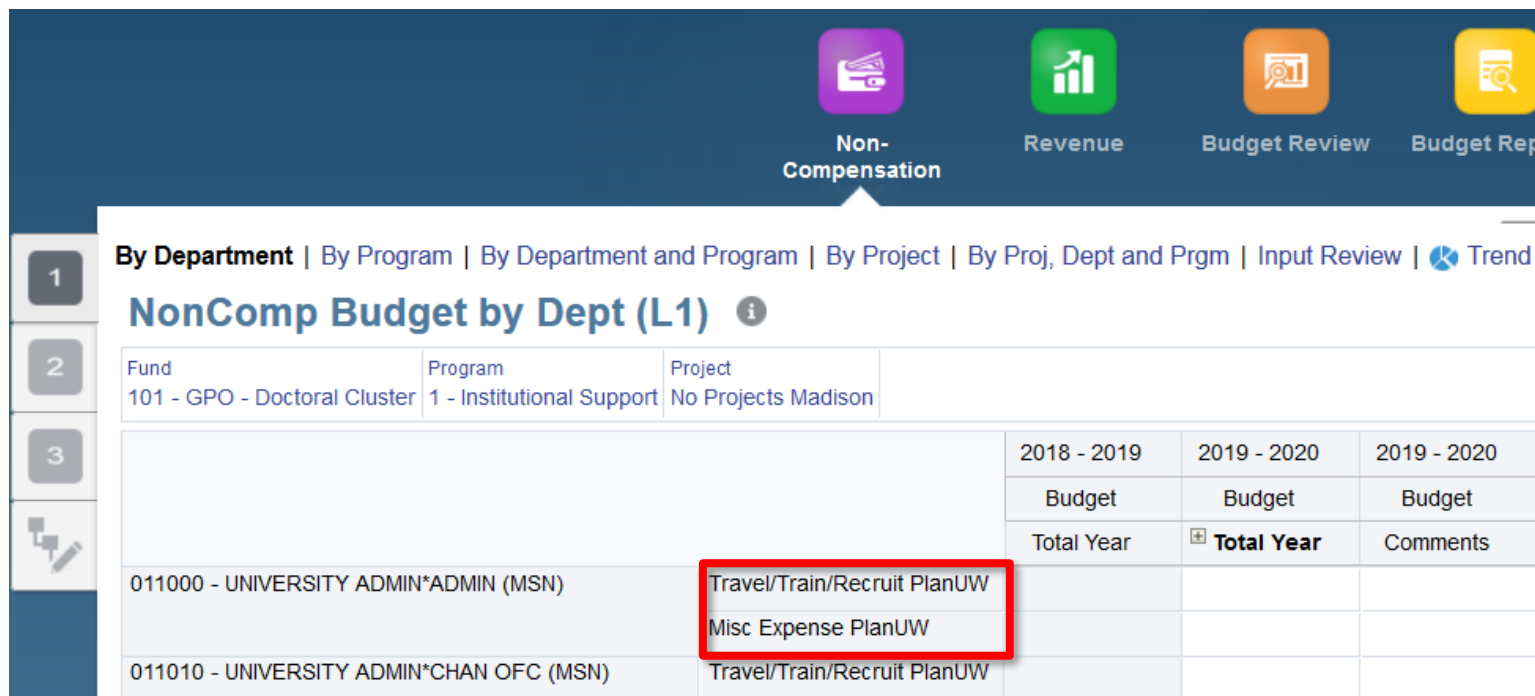
We are working with Huron to determine how to expose this information for new Divisions or large changes to DeptID structure. The more likely scenario end users may run into is moving to a new budget account that has not been used in the past due a change in operations or the addition of a new project.

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.

# 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.



Fund	Program	Project	2018 - 2019	2019 - 2020	2019 - 2020
101 - GPO - Doctoral Cluster	1 - Institutional Support	No Projects Madison	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			

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

Compensation

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

## NonComp Budget by Dept (L1)

Fund: 101 - GPO - Doctoral Cluster | Program: 1 - Institutional Support | Project: 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	
011010 - UNIVERSITY ADMIN*CHAN OFC (MSN)	Misc Expense PlanUW	
	Travel/Train/Recruit PlanUW	
	Maint & Repairs PlanUW	
	Supplies PlanUW	
	Services PlanUW	
	Misc Expense PlanUW	

Select Member

Search

Name

Travel/Train/Recruit PlanUW

Maint & Repairs PlanUW

Supplies PlanUW

Services PlanUW

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)

Compensation

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

## NonComp Budget by Dept (L1)

Fund: 101 - GPO - Doctoral Cluster | Program: 1 - Institutional Support | Project: 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	
011010 - UNIVERSITY ADMIN*CHAN OFC (MSN)	Maint & Repairs PlanUW	5,000
	Travel/Train/Recruit PlanUW	
	Maint & Repairs PlanUW	
	Supplies PlanUW	
	Services PlanUW	
	Misc Expense PlanUW	

Save

2018 - 2019	2019 - 2020	2019 - 2020
Budget	Budget	Budget
Total Year	Total Year	Comments
011000 - UNIVERSITY ADMIN*ADMIN (MSN)	Travel/Train/Recruit PlanUW	
	Maint & Repairs PlanUW	5,000
	Misc Expense PlanUW	

## 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.

[illegible]



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

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)

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

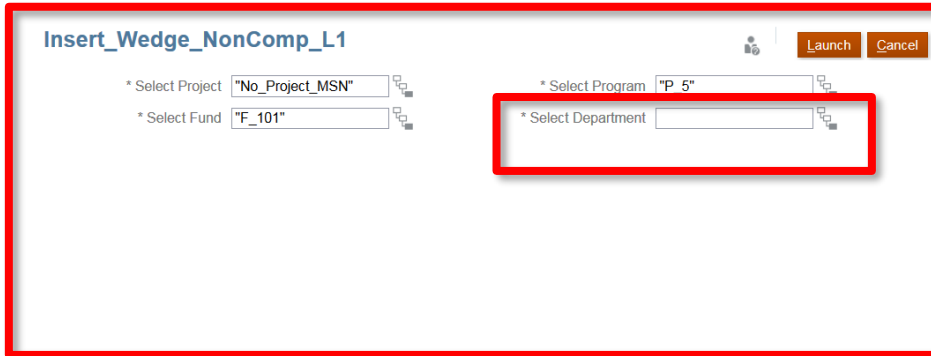
	2018 - 2019	2019 - 2020	2019 - 2020							
Budget										
Total Year		Total Year	Comments							

Actions


- Open Budget Accounts
- Remove Opened budget Accounts
- Filter
- Analyze
- New Ad Hoc Grid
- Predictive Planning
- Business Rules
- Smart Push Details
- Grid Validation Messages
- Clear Formatting
- Spreadsheet Export
- Open in Smart View


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


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




**Insert\_Wedge\_NonComp\_L1**


\* Select Project "No\_Project\_MSN" 

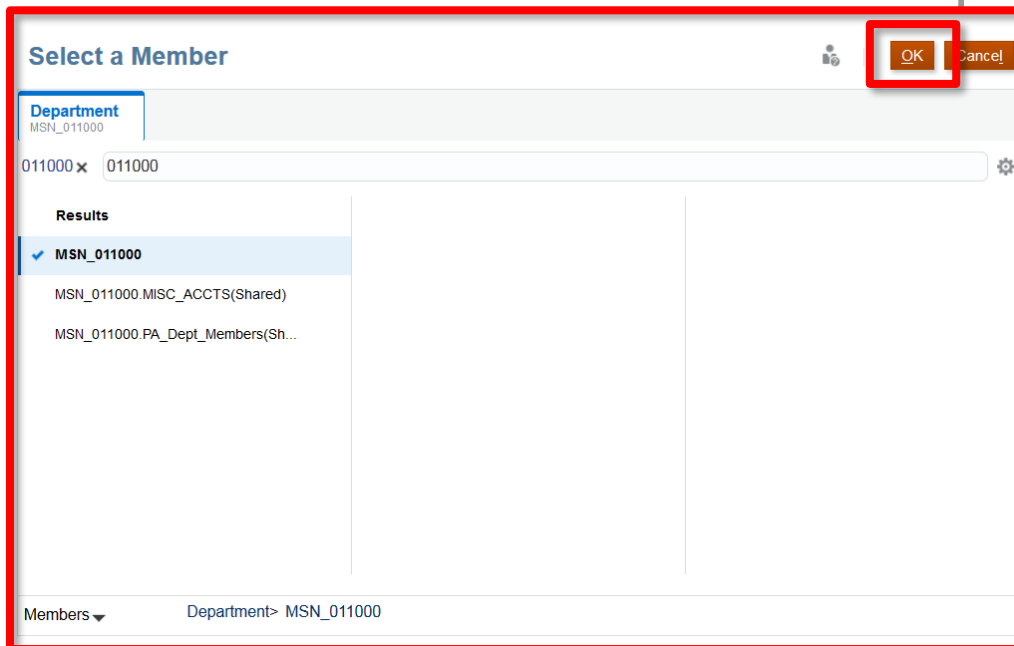
\* Select Fund "F\_101" 

\* Select Program "P 5" 

\* Select Department 


Launch Cancel

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"



**Select a Member**

Department  
MSN\_011000

011000 x 011000 

Results

✓ MSN_011000
MSN_011000.MISC_ACCTS(Shared)
MSN_011000.PA_Dept_Members(Sh...

Members ▼ Department> MSN\_011000

OK Cancel

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

## Insert\_Wedge\_NonComp\_L1

\* Select Project "No\_Project\_MSN"  
\* Select Fund "F\_101"

\* Select Program "P\_5"  
\* Select Department MSN\_011000

Launch

Cancel

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

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

### NonComp Budget by Dept (L1)

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

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

**Information**

Insert\_Wedge\_NonComp\_L1 was successful.

OK

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

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

2 **NonComp Budget by Dept (L1)** ⓘ

3

Fund	Program	Project	2018 - 2019	2019 - 2020	2019 - 2020
101 - GPO - Doctoral Cluster	5 - Public Service	No Projects Madison	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				

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

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

2 **NonComp Budget by Dept (L1)** ⓘ

3

Fund	Program	Project	2018 - 2019	2019 - 2020	2019 - 2020
101 - GPO - Doctoral Cluster	5 - Public Service	No Projects Madison	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**.



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

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

2 NonComp Budget by Dept (L1)

3

Fund 101 - GPO - Doctoral Cluster Program 5 - Public Service Project 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									

Open Budget Accounts

Remove Opened Budget Accounts

Filter

Analyze

New Ad Hoc Grid

Predictive Planning

Business Rules

Smart Push Details

Grid Validation Messages

Clear Formatting

Spreadsheet Export

Open in Smart View

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”

## Remove\_Wedge\_NonComp\_L1

[Launch](#)[Cancel](#)

\* Select Project "No\_Project\_MSN"

\* Select Program "P\_5"

\* Select Fund "F\_101"

\* Select Department

## Remove\_Wedge\_NonComp\_L1

[Launch](#)[Cancel](#)

\* Select Project "No\_Project\_MSN"

\* Select Program "P\_5"

\* Select Fund "F\_101"

\* Select Department MSN\_011000

Result:

Compensation						
By Department   By Program   By Department and Program   By Project   By Proj, Dept and Prgm   Input Review   Trend Review   PA Review						
NonComp Budget by Dept (L1)						
Fund	Program	Project				
101 - GPO - Doctoral Cluster	5 - Public Service	No Projects Madison				
			2018 - 2019	2019 - 2020		
			Budget	Budget	Budget	
			Total Year	Total Year	Comments	
011000 - UNIVERSITY ADMIN*ADMIN (MSN)		Travel/Train/Recruit PlanUW		50,000		
		Maint & Repairs PlanUW		50,000		

### Information

Remove\_Wedge\_NonComp\_L1 was successful.

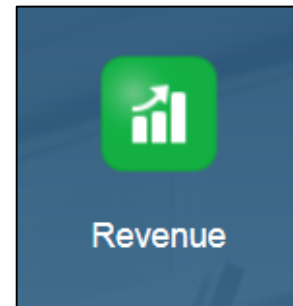
[OK](#)

**What areas are unclear or could use further explanation?**

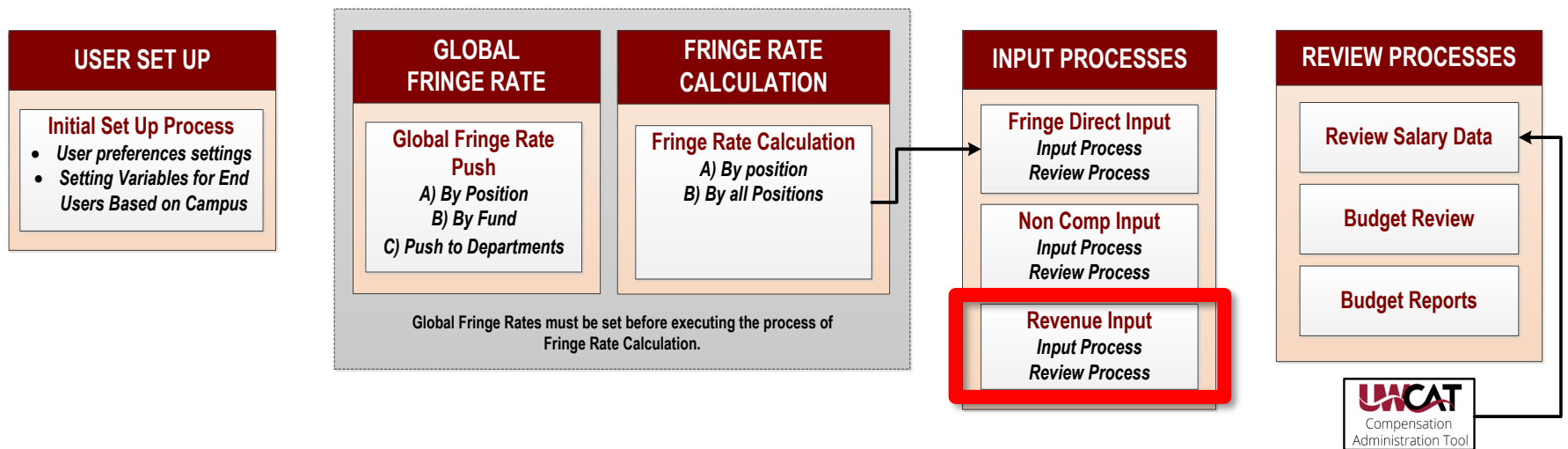
**Are there any exercises you'd like to walk through as a group or individually?**



# Input Revenue Data



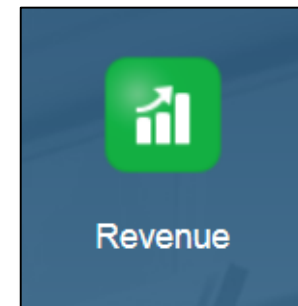
# Input Revenue Data in Annual Budgeting Process



# Revenue Input Process

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

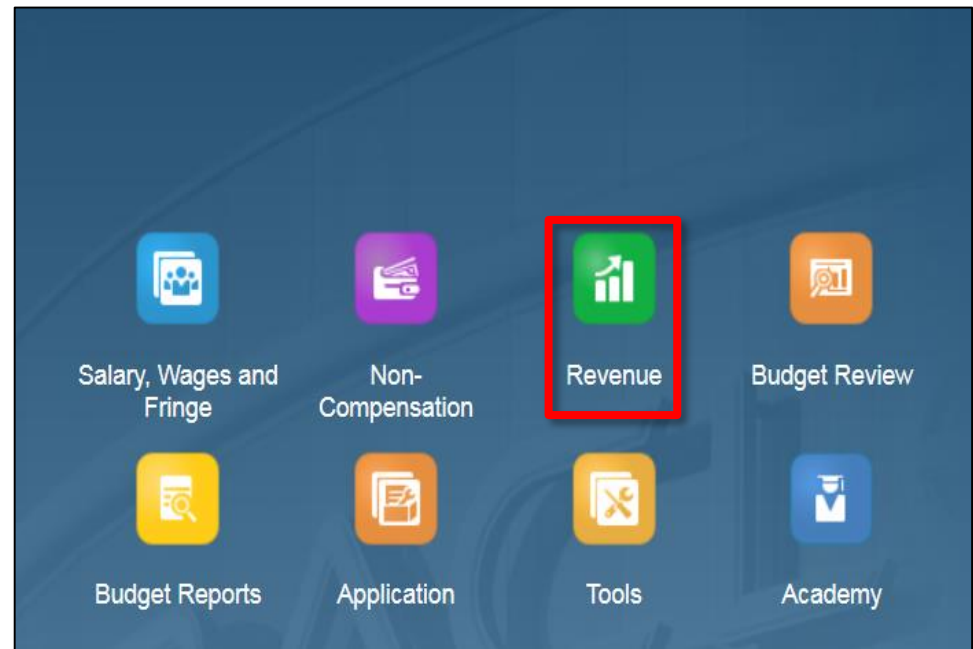
- This input process can take place at all three levels, **however we are only using Level 1 entry at UW-Madison for the FY20 budget process.**
- Input of budget data can take place in any of the following web forms:
  - By Department \*
  - By Program
  - By Department & Program
  - By Project
  - By 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.

The screenshot shows the 'Rev Budget by Dept (L1)' form. The 'By Department' tab is selected. The form displays filters for Fund (128 - Auxiliary Enterprises), Program (R - Revenue), and Project (No Projects Madison). The table below shows budget data for 2018-2019 and 2019-2020 for various departments.

		2018 - 2019	2019 - 2020	2019 - 2020		
		Budget	Budget	Budget		
		Total Year	Total Year	Comments		
011027 - UNIVERSITY ADMIN*WI IDEA S (MSN)	Gifts/Donations/Grants PlanUW					
011028 - UNIVERSITY ADMIN*CIC-ALP (MSN)	Gifts/Donations/Grants PlanUW					
011040 - UNIVERSITY ADMIN*COMMENCEMENT (MSN)	Misc. Revenue PlanUW					
	Gifts/Donations/Grants PlanUW					

# Revenue – [L1] – By Department

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

The screenshot shows the 'Rev Budget by Dept (L1)' interface. At the top, there is a navigation bar with icons for Non-Compensation, Revenue, Budget Review, Budget Reports, Academy, Dashboards, and Data. Below this is a breadcrumb trail: 'By Department' (highlighted with a red box and labeled '1'), 'By Program', 'By Department and Program', 'By Project', 'By Proj, Dept and Prgm', 'Input Review', 'Trend Review', and 'PA Review'. The main title is 'Rev Budget by Dept (L1)'. Below the title is a table with columns for Fund, Program, and Project. The first row is highlighted with a red box and labeled '2', showing 'Fund: 128 - Auxiliary Enterprises', 'Program: R - Revenue', and 'Project: No Projects Madison'. To the right of this table is a 'Total Year' column with a value of '40,000' highlighted by a red box and labeled '2'. On the far right, there is an 'Actions' menu with a 'Save' button highlighted by a red box and labeled '3'. The main table below has columns for '2018 - 2019', '2019 - 2020', and '2019 - 2020', with sub-columns for 'Budget', 'Total Year', and 'Comments'. The table contains several rows of data, including '011027 - UNIVERSITY ADMIN\*WI IDEA S (MSN)', '011028 - UNIVERSITY ADMIN\*CIC-ALP (MSN)', and '011040 - UNIVERSITY ADMIN\*COMMENCEMENT (MSN)'. The '011040' row has a value of '40,000' in the 'Total Year' column, which is highlighted by a red box and labeled '2'.

Fund	Program	Project
128 - Auxiliary Enterprises	R - Revenue	No Projects Madison

	2018 - 2019	2019 - 2020	2019 - 2020
	Budget	Budget	Budget
Total Year	Total Year	Total Year	Comments
011027 - UNIVERSITY ADMIN*WI IDEA S (MSN)	Gifts/Donations/Grants PlanUW		
011028 - UNIVERSITY ADMIN*CIC-ALP (MSN)	Gifts/Donations/Grants PlanUW		
011040 - UNIVERSITY ADMIN*COMMENCEMENT (MSN)	Misc. Revenue PlanUW	40,000	
	Gifts/Donations/Grants PlanUW		

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



# 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.

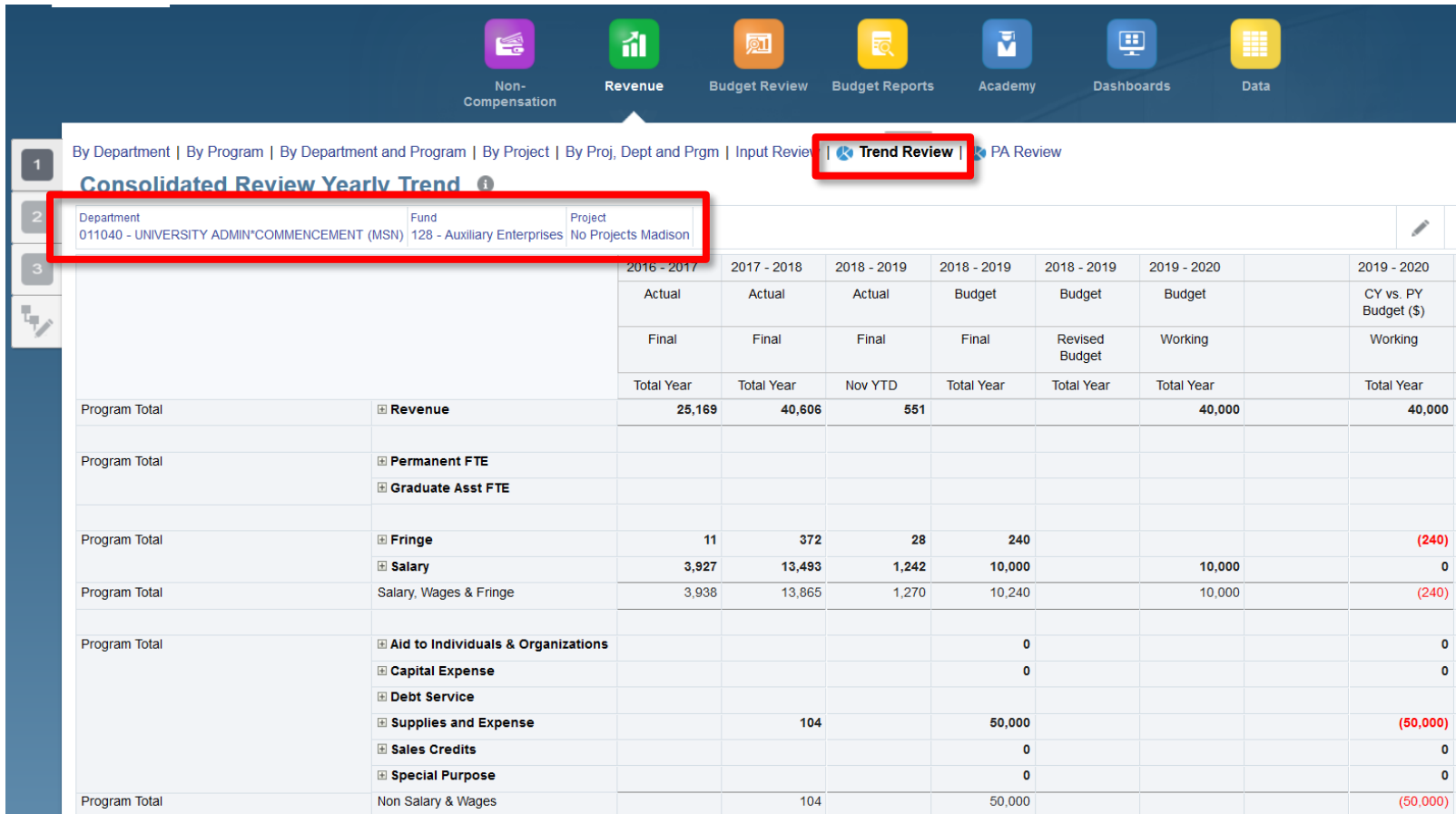
By Department | By Program | By Department and Program | By Project | By Proj, Dept and Prgm | **Input Review** | Trend Review | PA Review

## Rev Rollup Review (L1)

Department 011040 - UNIVERSITY ADMIN*COMMENCEMENT (MSN)	Fund 128 - Auxiliary Enterprises	Program R - Revenue	Project No Projects Madison				
	2016 - 2017	2017 - 2018	2018 - 2019	2018 - 2019	2019 - 2020	2019 - 2020	2019 - 2020
	Actual	Actual	Actual	Budget	Budget	CY vs. PY Budget (\$)	Budget
	Total Year	Total Year	Y-T-D(Nov)	Total Year	<input checked="" type="checkbox"/> Total Year	Total Year	Comments
Continuing Ed Fees PlanUW							
<input checked="" type="checkbox"/> <b>Continuing Ed Fees</b>							
Misc Fee PlanUW							
<input checked="" type="checkbox"/> <b>Misc Fee</b>							
Student Union Fees PlanUW							
<input checked="" type="checkbox"/> <b>Student Union Fees</b>							
Segregated Fees Other PlanUW							
<input checked="" type="checkbox"/> <b>Segregated Fees Other</b>							
Student Svc & Act Fees PlanUW							
<input checked="" type="checkbox"/> <b>Student Services &amp; Activity Fees</b>							
9292 - Sem 1 - Seg Fees							
9294 - Sem 2 - Seg Fees							
9297 - Summer - Seg Fees							
9298 - Seg Fees Prior Year							
<input checked="" type="checkbox"/> <b>Segregated Fees</b>							
Misc. Revenue PlanUW					40,000	40,000	
<input checked="" type="checkbox"/> <b>Misc. Revenue</b>	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.



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
011040 - UNIVERSITY ADMIN*COMMENCEMENT (MSN)	128 - Auxiliary Enterprises	No Projects Madison

		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	<b>Revenue</b>	25,169	40,606	551			40,000	40,000
Program Total	<b>Permanent FTE</b>							
Program Total	<b>Graduate Asst FTE</b>							
Program Total	<b>Fringe</b>	11	372	28	240			(240)
Program Total	<b>Salary</b>	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	<b>Aid to Individuals &amp; Organizations</b>				0			0
Program Total	<b>Capital Expense</b>				0			0
Program Total	<b>Debt Service</b>							
Program Total	<b>Supplies and Expense</b>		104		50,000			(50,000)
Program Total	<b>Sales Credits</b>				0			0
Program Total	<b>Special Purpose</b>				0			0
Program Total	Non Salary & Wages		104		50,000			(50,000)

### 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.

Non-Compensation Revenue Budget Review Budget Reports Academy Dashboards

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

### Rev Budget by Prgm (L1)

Department		Fund	Project
011040 - UNIVERSITY ADMIN*COMMENCEMENT (MSN)		128 - Auxiliary Enterprises	No Projects Madison

		2018 - 2019	2019 - 2020	2019 - 2020					
		Budget	Budget	Budget					
		Total Year	Total Year	Comments					
Misc. Revenue PlanUW	1 - Institutional Support								
	R - Revenue		40,000						
Gifts/Donations/Grants PlanUW	R - Revenue								

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.

## 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.

[illegible]

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.

Non-Compensation Revenue Budget Review Budget Reports Academy

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

## Rev Budget by Dept and Prgm (L1)

Fund	Project			2018 - 2019	2019 - 2020	2019 - 2020
				Budget	Budget	Budget
				Total Year	Total Year	Comments
011027 - UNIVERSITY ADMIN*WI IDEA S (MSN)	R - Revenue	Gifts/Donations/Grants PlanUW				
011028 - UNIVERSITY ADMIN*CIC-ALP (MSN)	R - Revenue	Gifts/Donations/Grants PlanUW				
011040 - UNIVERSITY ADMIN*COMMENCEMENT (MSN)	1 - Institutional Support	Misc. Revenue PlanUW				
	R - Revenue	Misc. Revenue PlanUW			40,000	
		Gifts/Donations/Grants PlanUW				

# 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.

The screenshot displays the 'Rev Budget by Dept and Prgm (L1)' interface. The top navigation bar includes icons for Non-Compensation, Revenue, Budget Review, Budget Reports, Academy, Dashboards, and Data. The main view is titled 'By Department | By Program | **By Department and Program** | By Project | By Proj, Dept and Prgm | Input Review | Trend Review | PA Review'. Below the title, the 'Fund' is set to '128 - Auxiliary Enterprises' and the 'Project' is 'No Projects Madison'. A red box highlights this selection area, with a red arrow pointing to it labeled '1'. The table below shows budget data for various departments and programs. A red box highlights the 'Total Year' column for the 'R - Revenue' row, with a red arrow pointing to it labeled '2'. The 'Total Year' column shows a value of '5,000'. A red box highlights the 'Save' button in the top right corner, with a red arrow pointing to it labeled '3'. The table data is as follows:

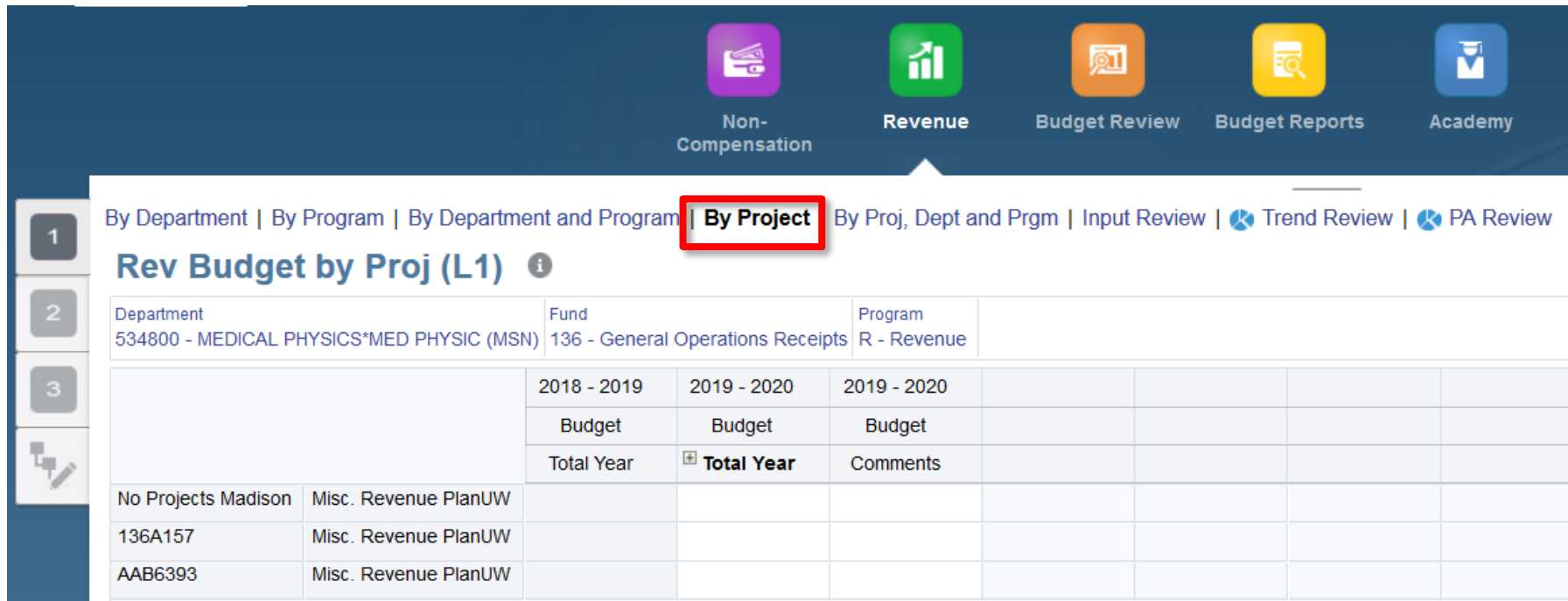
	2018 - 2019	2019 - 2020	2019 - 2020							
	Budget	Budget	Budget							
	Total Year	Total Year	Comments							
011027 - UNIVERSITY ADMIN*WI IDEA S (MSN)	R - Revenue	Gifts/Donations/Grants PlanUW								
011028 - UNIVERSITY ADMIN*CIC-ALP (MSN)	R - Revenue	Gifts/Donations/Grants PlanUW								
011040 - UNIVERSITY ADMIN*COMMENCEMENT (MSN)	1 - Institutional Support	Misc. Revenue PlanUW								
	R - Revenue	Misc. Revenue PlanUW								
		Gifts/Donations/Grants PlanUW								

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](mailto: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-Compensation Revenue Budget Review Budget Reports Academy

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

### Rev Budget by Proj (L1)

Department		Fund	Program
534800 - MEDICAL PHYSICS*MED PHYSIC (MSN)		136 - General Operations Receipts	R - Revenue

		2018 - 2019	2019 - 2020	2019 - 2020			
		Budget	Budget	Budget			
		Total Year	Total Year	Comments			
No Projects Madison	Misc. Revenue PlanUW						
136A157	Misc. Revenue PlanUW						
AAB6393	Misc. Revenue 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.

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

### Rev Budget by Proj (L1) ?

Actions ▼ **Save** Refresh

Department	Fund	Program	
534800 - MEDICAL PHYSICS*MED PHYSIC (MSN)	136 - General Operations Receipts	R - Revenue	
	2018 - 2019	2019 - 2020	2019 - 2020
	Budget	Budget	Budget
	Total Year	<b>Total Year</b>	Comments
No Projects Madison	Misc. Revenue PlanUW		
136A157	Misc. Revenue PlanUW	10,000	
AAB6393	Misc. Revenue PlanUW		

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.

The screenshot displays the 'Revenue' section of a software interface. The top navigation bar includes icons for Non-Compensation, Revenue (highlighted), Budget Review, Budget Reports, Academy, Dashboards, and Data. Below this, a breadcrumb trail shows 'By Department | By Program | By Department and Program | By Project | **By Proj, Dept and Prgm** | Input Review | Trend Review | PA Review'. The main title is 'Rev Budget by Proj, Dept and Prgm (L1)'. A sidebar on the left contains numbered tabs 1, 2, and 3, with a pencil icon at the bottom. The main content area shows a table for 'Fund 136 - General Operations Receipts'.

				2018 - 2019	2019 - 2020	2019 - 2020	
				Budget	Budget	Budget	
				Total Year	<b>Total Year</b>	Comments	
136A157	534800 - MEDICAL PHYSICS*MED PHYSIC (MSN)	R - Revenue	Misc. Revenue PlanUW				
136A164	531100 - CELL&REGEN BIOL*CELL REGEN (MSN)	R - Revenue	Misc. Revenue PlanUW				
136A165	530221 - ADMINISTRATION*HUMAN SUBJ (MSN)	4 - Research	Misc. Revenue PlanUW				
		R - Revenue	Misc. Revenue PlanUW				
136A166	534220 - MEDICINE*ALLRGY&IMM (MSN)	5 - Public Service	Misc. Revenue PlanUW				
		R - Revenue	Misc. Revenue PlanUW				
			9942 - Trfs-Same Funds/Same Unit				
136A173	530271 - ADMINISTRATION*RENT-LEASE (MSN)	R - Revenue	Misc. Revenue PlanUW				
AAA2526	538900 - PSYCHIATRY*PSYCHIATRY (MSN)	R - Revenue	Misc. Revenue PlanUW				

# 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.

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

Rev Budget by Proj, Dept and Prgm (L1)

Fund  
136 - General Operations Receipts

				2018 - 2019	2019 - 2020	2019 - 2020						
				Budget	Budget	Budget						
				Total Year	Total Year	Comments						
136A157	534800 - MEDICAL PHYSICS*MED PHYSIC (MSN)	R - Revenue	Misc. Revenue PlanUW									
136A164	531100 - CELL&REGEN BIOL*CELL REGEN (MSN)	R - Revenue	Misc. Revenue PlanUW		50,000							
136A165	530221 - ADMINISTRATION*HUMAN SUBJ (MSN)	4 - Research	Misc. Revenue PlanUW									
		R - Revenue	Misc. Revenue PlanUW									
136A166	534220 - MEDICINE*ALLRGY&IMM (MSN)	5 - Public Service	Misc. Revenue PlanUW									

Actions Save Refresh

Data Assoc Format

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.

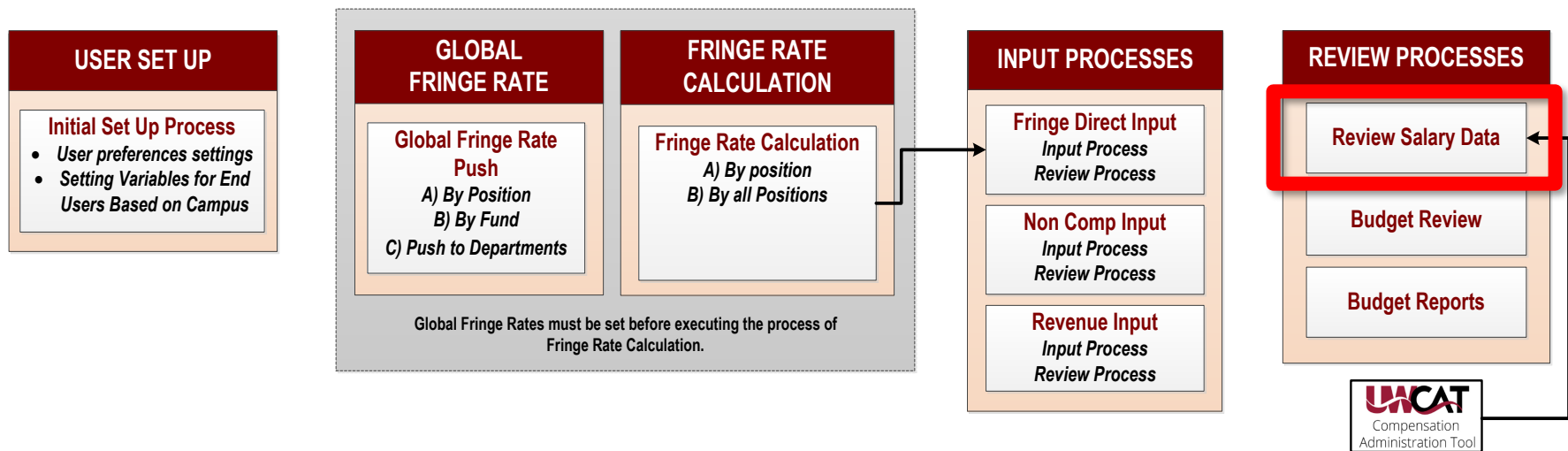
Please ask for help if needed.

## Knowledge Check – Revenue

# Salary & Wage Review



# Reviewing Salary Data in Annual Budgeting Process



# Review Salary Data

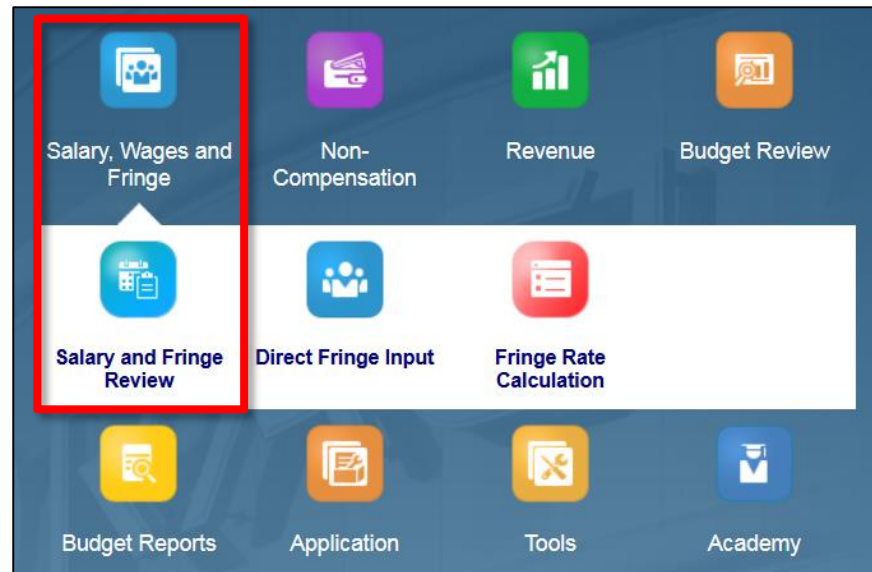
To begin the salary data review process:

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.





# Review Salary Data

Salary and Fringe Review								
Department	Fund	Program	Project					
UW EAU TOP (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							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.

**i** 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	
<input checked="" type="checkbox"/> Permanent FTE						2		2	
<input checked="" type="checkbox"/> Graduate Asst FTE									
----- SALARY -----									
<input checked="" type="checkbox"/> Faculty Salary									
<input checked="" type="checkbox"/> Academic Staff Salary	195396	164055	38559			148932		148932	
<input checked="" type="checkbox"/> University Staff Salary	1089	8588							
<input checked="" type="checkbox"/> Salary - Other									
<input checked="" type="checkbox"/> Postgrad Trainee Salary									
<input checked="" type="checkbox"/> Graduate - RA Salary									
<input checked="" type="checkbox"/> Graduate - PA Salary									
<input checked="" type="checkbox"/> Graduate - TA Salary									
<input checked="" type="checkbox"/> LTE Salary									
<input checked="" type="checkbox"/> 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	
<input checked="" type="checkbox"/> Permanent FTE									
<input checked="" type="checkbox"/> Graduate Asst FTE									
----- SALARY -----									
<input checked="" type="checkbox"/> Faculty Salary									
<input checked="" type="checkbox"/> Academic Staff Salary									
<input checked="" type="checkbox"/> University Staff Salary									
<input checked="" type="checkbox"/> Salary - Other									
<input checked="" type="checkbox"/> Postgrad Trainee Salary									
<input checked="" type="checkbox"/> Graduate - RA Salary									
<input checked="" type="checkbox"/> Graduate - PA Salary									
<input checked="" type="checkbox"/> Graduate - TA Salary									
<input checked="" type="checkbox"/> LTE Salary									

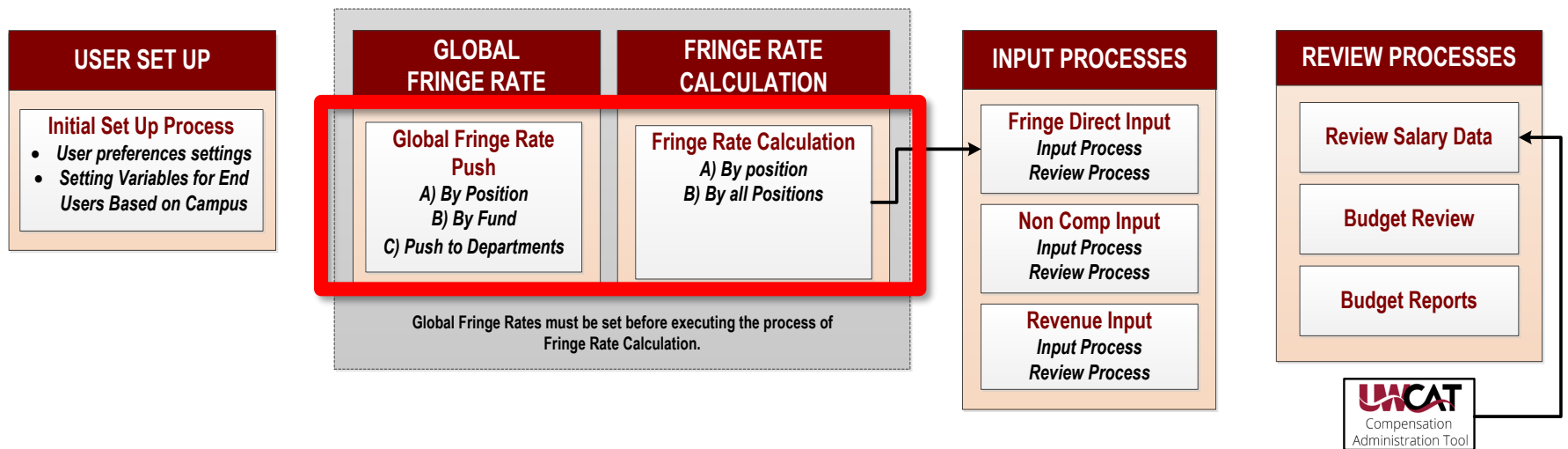
(Insert dept) – Does Not Contain Data

## Knowledge Check – Salary Review

# Input Fringe Rates




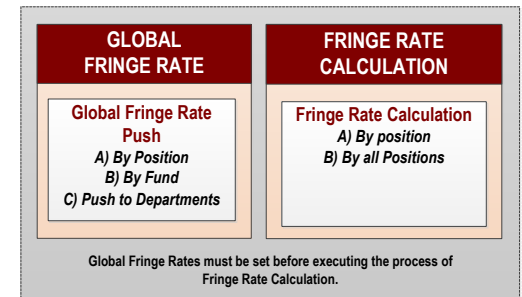
# Input Fringe Rates in Annual Budgeting Process



# 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.*



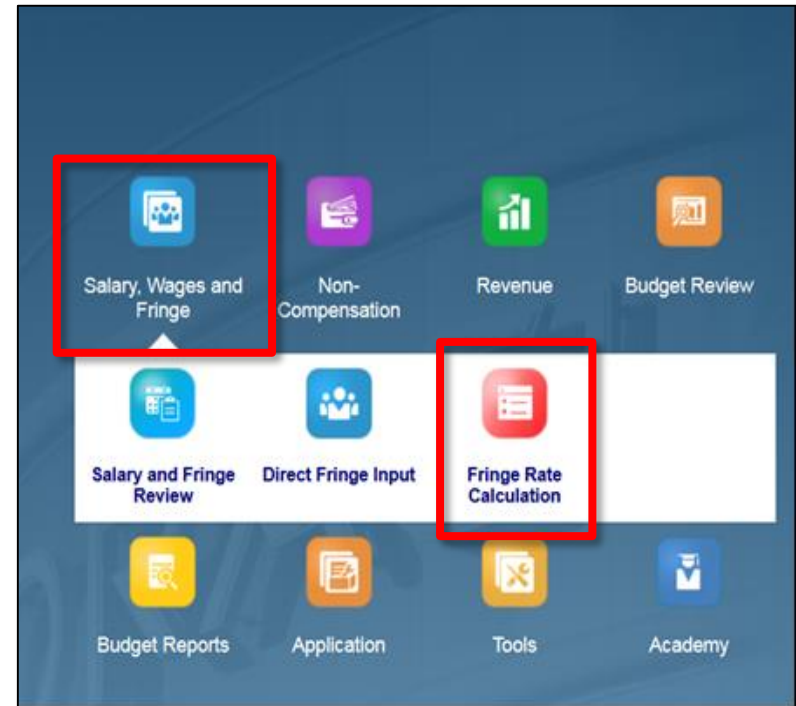
# Input Fringe Rates

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**. These campuses will have to set their User Variables before beginning.

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**.

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

**Faculty Academic Fringe Adjustment** ⓘ

Fund	Program	Project	2019 - 2020	2019 - 2020	2019 - 2020	---	2019 - 2020	2019 - 2020	----
131 - Academic Student Fees	0 - Student Services	No Projects Eau Claire	Budget	Budget	Budget	---	Budget	Budget	Budget
			Input	Input	Input	---	Adjustment	Working	Adjusted
			<b>YearTotal</b>	BegBal	<b>YearTotal</b>	---	<b>YearTotal</b>	<b>YearTotal</b>	----
			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%					

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.

**1**

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

**Faculty Academic Fringe Adjustment** ⓘ

Fund	Program	Project
131 - Academic Student Fees	8 - Auxiliary Enterprises	No Project

**2**

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

**All Positions Fringe Adjustment** ⓘ

Fund	Program	Project
131 - Academic Student Fees	8 - Auxiliary Enterprises	No Project



# Fringe Calculation Nightly Automated Process

<b>Faculty/Academic</b>   University Staff   LTE   Grad Assistant   Student   All Positions							
<b>Faculty Academic Fringe Adjustment</b> ⓘ							
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.*)

The screenshot shows the 'Faculty Academic Fringe Adjustment' interface. A red box with a circled '1' highlights the 'Fund', 'Program', and 'Project' selection area at the top. Another red box with a circled '2' highlights the table of fringe rates. The table has columns for '2018 - 2019' and '2018 - 2019' (repeated for different categories) and rows for 'Budget', 'Input', 'YearTotal', 'Faculty/Acad Salary Total', 'Faculty/Academic Fringe Rate', and 'Faculty/Acad Fringe PlanUW'.

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

# 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.

The screenshot shows the 'Faculty Academic Fringe Adjustment' interface. A red box labeled '1' highlights the table where fringe rates are entered. A red box labeled '2' highlights the 'Save' button in the top right. A red box labeled '3' highlights the 'OK' button in a confirmation pop-up.

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

**Information**  
 Messages for this page are listed below.  
 • The data has been saved.  
 • Rule was run successfully  
 • Smart Push was successful.

# 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

<b>Faculty/Academic   University Staff   LTE   Grad Assistant   Student   All Positions</b>									
<b>Faculty Academic Fringe Adjustment</b>									
Fund	Program	Project							
128 - Auxiliary Enterprises	8 - Auxiliary Enterprises	No Project							
			2018 - 2019	2018 - 2019	2018 - 2019	---	2018 - 2019	2018 - 2019	---
			Budget	Budget	Budget	---	Budget	Budget	Budget
			Input	Input	Input	---	Adjustment	Working	Adjusted
			<b>YearTotal</b>	BegBal	<b>YearTotal</b>	---	<b>YearTotal</b>	<b>YearTotal</b>	---
			Faculty/Acad Salary Total	Faculty/Academic Fringe Rate	Faculty/Acad Fringe PlanUW	---	Faculty/Acad Fringe PlanUW	Faculty/Acad Fringe Rate	Faculty/Academic Fringe Rate
841000 - Parking Fee-Traffic Fine (RVF)			41971	18%	7555		200	7555	18%
892000 - Dining Service (RVF)			111531	18%	20076		500	20076	18%
821005 - Carding Office (RVF)			5202	12%	624			624	12%
891030 - Conf & Events - Univ Center (RVF)			4162	18%	749			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

Fund

Program

Project

128 - Auxiliary Enterprises

8 - Auxiliary Enterprises

No Project

Data

Ad hoc

Format

	2018 - 2019	2018 - 2019	2018 - 2019	---	2018 - 2019	2018 - 2019	----			
	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



C 18



## **In class exercise:**

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

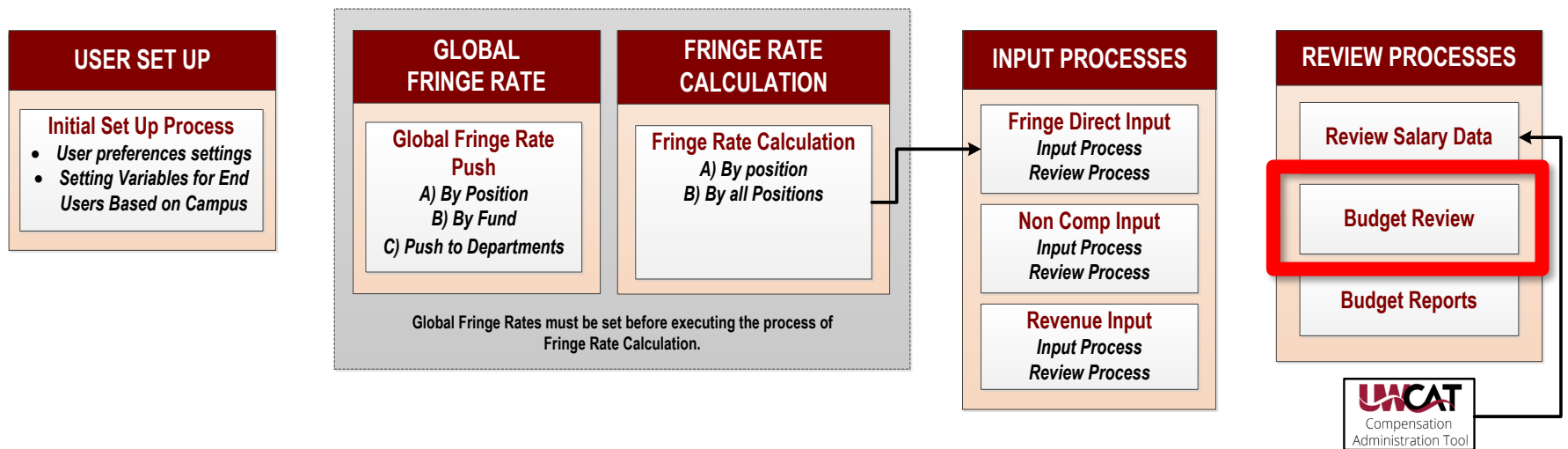
Practice making an adjustment to the dollar amount of the calculation.



# Budget Review



# Budget Review in Annual Budgeting Process



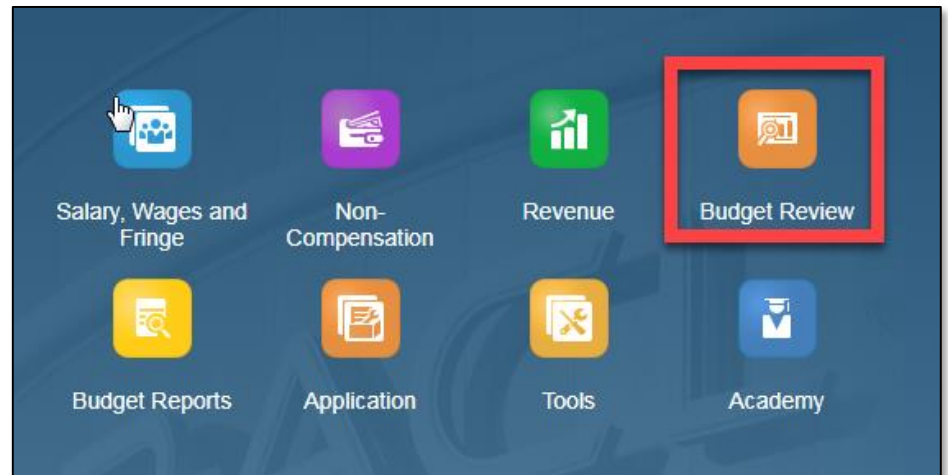
# Budget Review – Before We Begin

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
Program Total	Graduate Asst FTE							
Program Total	Salary		45,139,016	46,528,314	7,497,962	49,459,579	49,459,579	49,459,579
Program Total	Fringe		14,897,135	15,349,609	3,063,739	3,600,521	3,600,521	28,933
Program Total	Salary, Wages & Fringe		60,036,150	61,877,923	10,561,702	53,060,100	53,060,100	49,488,512
Program Total	Supplies and Expense		52,246,287	56,588,551	7,312,618	41,500,825	41,500,825	20,000
Program Total	Capital Expense		4,113,701	4,747,922	211,753	7,472,000	7,472,000	
Program Total	Aid to Individuals & Organizations					0	0	



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

# 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
		Actual	Actual	Actual	Budget	Budget	CY vs. PY Budget (\$)
		Final	Final	Final	Final	Revised Budget	Working
		Total Year	Total Year	Aug YTD	Total Year	Total Year	Total Year
Program Total	Revenue	42,612	101,373,948	9,490			
Program Total	Permanent FTE					845	845
Program Total	Graduate Asst FTE						
Program Total	Salary	55,654,696	54,946,930	5,012,717	53,860,045	53,860,045	(2,164,151)
Program Total	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	(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)
Program Total	Capital Expense	1,250,242	1,001,232	170,932	1,319,193	1,319,193	(1,319,193)
Program Total	Aid to Individuals & Organizations	2,442,383	3,524,019	48,852	802,267	802,267	(802,267)
Program Total	Special Purpose				11,805,595	11,805,595	(11,805,595)
Program Total	Debt Service	12,243,364	10,595,270				
Program Total	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	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
Program Total	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)
Program Total	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)
Program Total	Capital Expense	1,250,242	1,001,232	170,932	1,319,193	1,319,193		(1,319,193)
Program Total	Aid to Individuals & Organizations	2,442,383	3,524,019	48,852	802,267	802,267		(802,267)
Program Total	Special Purpose				11,805,595	11,805,595		(11,805,595)
Program Total	Debt Service	12,243,364	10,595,270					
Program Total	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 UW OSH ALL_ORGS (OSH)		Fund GPR/Tuition		Project 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)	



# Budget Review – PA Review

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

**PA Review By Account**

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

# 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.

PA Review By Account

	Budget	PA - Budget Allocation	Allocation Target vs Budget (\$)
	Working Program Total	Final No Program	Working No Program
Permanent FTE	3,776,453,844,000	939	2,840
Graduate Asst FTE			
Salary	282,585,638	55,506,802	227,084,836
Fringe	1,043,791	34,790	1,009,001
Salary, Wages & Fringe	283,629,429	55,535,592	228,093,837
Non Comp Expense Planning Allocation		4,116,537	(4,116,537)
Supplies and Expense	650,786		650,786
Capital Expense	1,391,189		1,391,189
Aid to Individuals & Organizations			
Special Purpose			
Debt Service			
Sales Credits			
Non Salary & Wages	2,041,975	4,116,537	(2,074,562)
Expenses	285,671,404	59,652,129	226,019,275

PA Review by Program

		Budget	PA - Budget Allocation	Allocation Target vs Budget (\$)
		Working	Final	Working
0 - Student Services	Expenses	381,852	902,874	(521,222)
1 - Institutional Support	Expenses			
2 - Institution	Expenses	114,159,791	46,257,663	67,902,128
3 - Hospitals	Expenses			
4 - Research	Expenses	149,263,412	13,564,543	135,758,869
5 - Public Service	Expenses	8,062,725	1,644,611	6,358,114
6 - Academic Support	Expenses	13,833,188	4,241,649	9,591,539
7 - Operation and Maintenance of Physical Plant	Expenses	30,636		30,636
8 - Auxiliary Enterprises	Expenses			
9 - Financial Aid	Expenses		528,888	(528,888)
F - Farm Operations	Expenses			
R - Revenue	Expenses			
Program Total	Expenses	285,671,404	67,080,228	218,591,176



# 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.*

Trend Review | PA Review | Review by Fund

Years: 2019 - 2020 | Period: Total Year | Department: 53 - MEDICAL SCHOOL (MSN) | Fund: 101 - GPO - Doctoral Cluster | Project: Project Total

PA Review By Account

	Budget	PA - Budget Allocation	Allocation Target vs Budget (\$)
	Working Program Total	Final No Program	Working No Program
Permanent FTE	853,893,335	667	(14)
Graduate Asst FTE			
Salary	58,424,933	55,227,355	3,197,578
Fringe			
Salary, Wages & Fringe	58,424,933	55,227,355	3,197,578
Non Comp Expense Planning Allocation		3,125,670	(3,125,670)
Supplies and Expense	195,000		195,000
Capital Expense	1,391,189		1,391,189
Aid to Individuals & Organizations			
Special Purpose			
Debt Service			
Sales Credits			
Non Salary & Wages	1,586,189	3,125,670	(1,539,481)
Expenses	60,011,122	58,353,025	1,658,097

PA Review by Program

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

# 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	<div>GPR/Tuition</div>	<div>TUI</div>	<div>OP REC</div>	<div>FICR</div>	<div>GGC</div>	<div>OTHER</div>	Fund Total
Program Total	<div>Revenue</div>			902,141	305,007				1,207,148
Program Total	<div>Permanent FTE</div>		656	16	205	13	2,885	3	3,778
	<div>Graduate Asst FTE</div>								
Program Total	<div>Salary</div>	293,581,576	58,663,876	1,325,719	13,450,739	1,025,378	207,860,684	259,242	282,585,638
	<div>Fringe</div>	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	<div>Supplies and Expense</div>	18,246,156	195,000		455,786				650,786
	<div>Capital Expense</div>	2,450,389	1,391,189						1,391,189
	<div>Aid to Individuals &amp; Organizations</div>	2,173,535							
	<div>Special Purpose</div>	0							
	<div>Debt Service</div>								
	<div>Sales Credits</div>	(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.*

Department 11 - COLLEGE OF NURSING (OSH) 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	SPR Tuition	AUX	OP REC	GGC	OTHER	Fund Total
Program Total	Revenue	2,230,688	4,534,216	10,931	1,933,498	186,539	(202)	6,894,630
Program Total	Permanent FTE		36		5			58
Program Total	Graduate Asst FTE							
Program Total	Salary	758,360	2,799,297	11,755	797,804	9,919		5,058,011
Program Total	Fringe	182,581	1,511,293	1,522	99,700	5,861		1,692,897
Program Total	Salary, Wages & Fringe	940,941	4,310,590	13,277	897,504	15,780		6,750,908
Program Total	Supplies and Expense	210,626	63,590	874	161,833	34,736	4,000	292,250
	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							

# Budget Review – Review by Fund

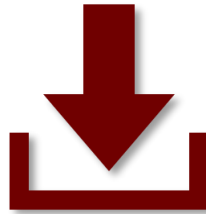
Validate the Budget you have entered from the input forms is correct and aggregated by Department, Program, Fund and Project.

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
		Budget	Budget	Budget	Budget	Budget	Budget
		Final	Working	Revised Budget	Working	Working	Working
		Total Year	Total Year	Total Year	Total Year	Total Year	Total Year
		Fund Total	GPR Tuition	AUX	OP REC	GGC	OTHER
Program Total	Revenue	2,230,688	4,534,216	10,931	1,933,498	186,539	(202)
Program Total	Permanent FTE		36		5		58
Program Total	Graduate Asst FTE						
Program Total	Salary	758,360	2,799,297	11,755	797,804	9,919	5,058,011
Program Total	Fringe	182,581	1,511,293	1,522	99,700	5,861	1,692,897
Program Total	Salary, Wages & Fringe	940,941	4,310,590	13,277	897,504	15,780	6,750,908
Program Total	Supplies and Expense	210,626	63,590	874	161,833	34,736	292,250
Program Total	Capital Expense	38,280	1,350		3,180		48,701
Program Total	Aid to Individuals & Organizations	2,434			719	2,291	3,010
Program Total	Special Purpose		100				100
Program Total	Debt Service						
Program Total	Sales Credits						
Program Total	Non Salary & Wages	251,339	65,040	874	165,731	37,028	344,061
0 - Student Services	Expenses	595	15,800	736			16,536
1 - Institutional Support	Expenses						

## Knowledge Check – Budget Review

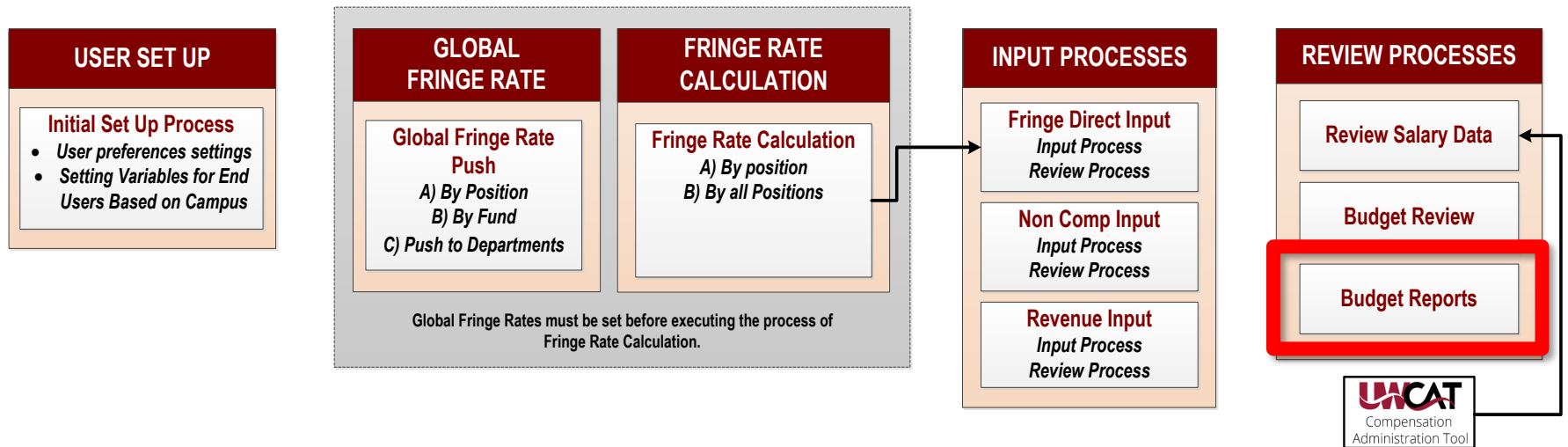


# Budget Reports



**C 75**

# Budget Reports in Annual Budgeting Process

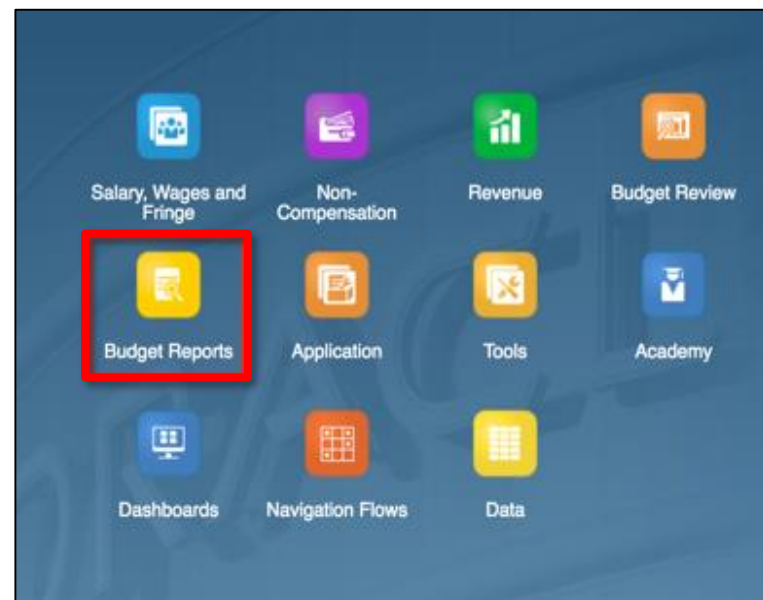


# Budget Reports

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

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

## Budget Summary Report

File Format PDF ▾

**Version**  
Working

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

### Select a Member

Version Working

Search Version

Version	
Variance_Versions	Base
Working	Adj
Final	
Revised	
PlanV1	
PlanV2	
PlanV3	
Status_Version	

Members Version> Working

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

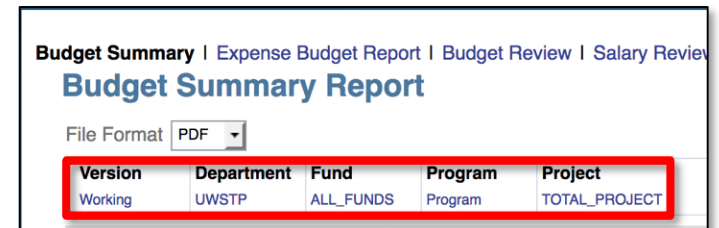
Selecting the versions highlighted in red will only return partial or no information for the report.

# 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



# 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  
**UW**

Year columns can be expanded to see monthly data

	2016 - 2017	2017 - 2018	2016 - 2017	2016 - 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 (\$)
<b>Revenue and Operating Transfers</b>							
▸ 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	-	-	-	-	-

Rows Expand or Collapse

# 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	-	-	-	-
<b>Non Salary &amp; Wages</b>	<b>\$119,654,271</b>	<b>\$114,024,301</b>	<b>\$9,365,167</b>	<b>-</b>	<b>-</b>	<b>\$832,294</b>	<b>\$832,294</b>
<b>Expenses</b>	<b>\$219,205,484</b>	<b>\$215,338,890</b>	<b>\$22,786,386</b>	<b>-</b>	<b>-</b>	<b>\$2,124,618</b>	<b>\$2,124,618</b>
<b>Expenses (excluding Fringe)</b>	<b>\$190,123,742</b>	<b>\$185,951,028</b>	<b>\$17,295,672</b>	<b>-</b>	<b>-</b>	<b>\$1,763,853</b>	<b>\$1,763,853</b>
<b>Statement of Activities</b>	<b>\$53,966,183</b>	<b>\$55,839,348</b>	<b>\$13,392,674</b>	<b>-</b>	<b>-</b>	<b>\$11,043,671</b>	<b>\$11,043,671</b>

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**.

A screenshot of the 'Budget Summary Report' in PDF format. The report displays a table of financial data for the University of Wisconsin System. The table includes columns for various years and categories, with a 'CY vs. PY Budget (\$)' column. A red box highlights the download and print icons in the top right corner. A red arrow points from the 'File Format' dropdown in the previous image to this screenshot.

	2016 - 2017 Actual Final Year Total	2017 - 2018 Actual Final Year Total	2016 - 2017 Actual Final Aug YTD	2016 - 2017 Budget Final Year Total	2016 - 2017 Budget Revised Budget Year Total	2019 - 2020 Budget Working Year Total	CY vs. PY Budget (\$)
<b>Revenue and Operating Transfers</b>							
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

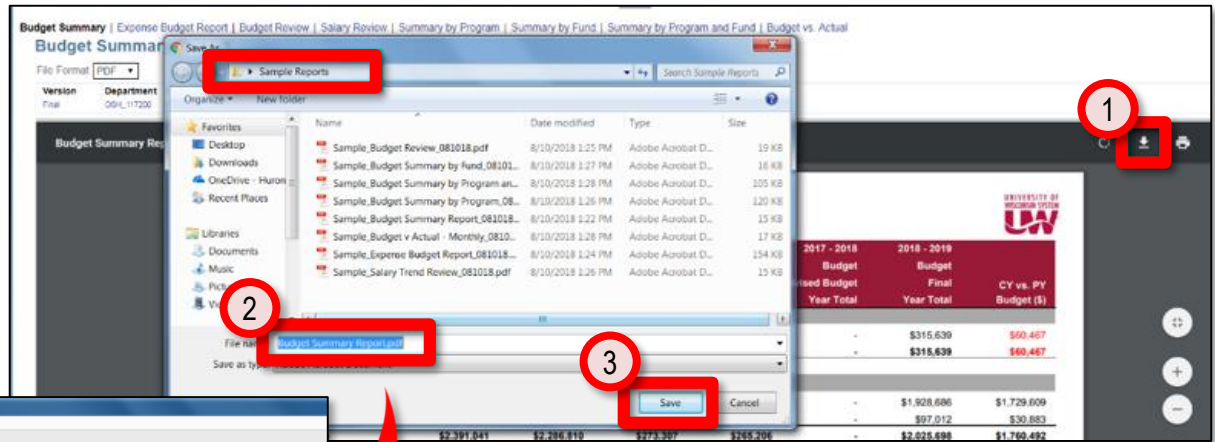


# Budget Summary PDF Format in Chrome

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!

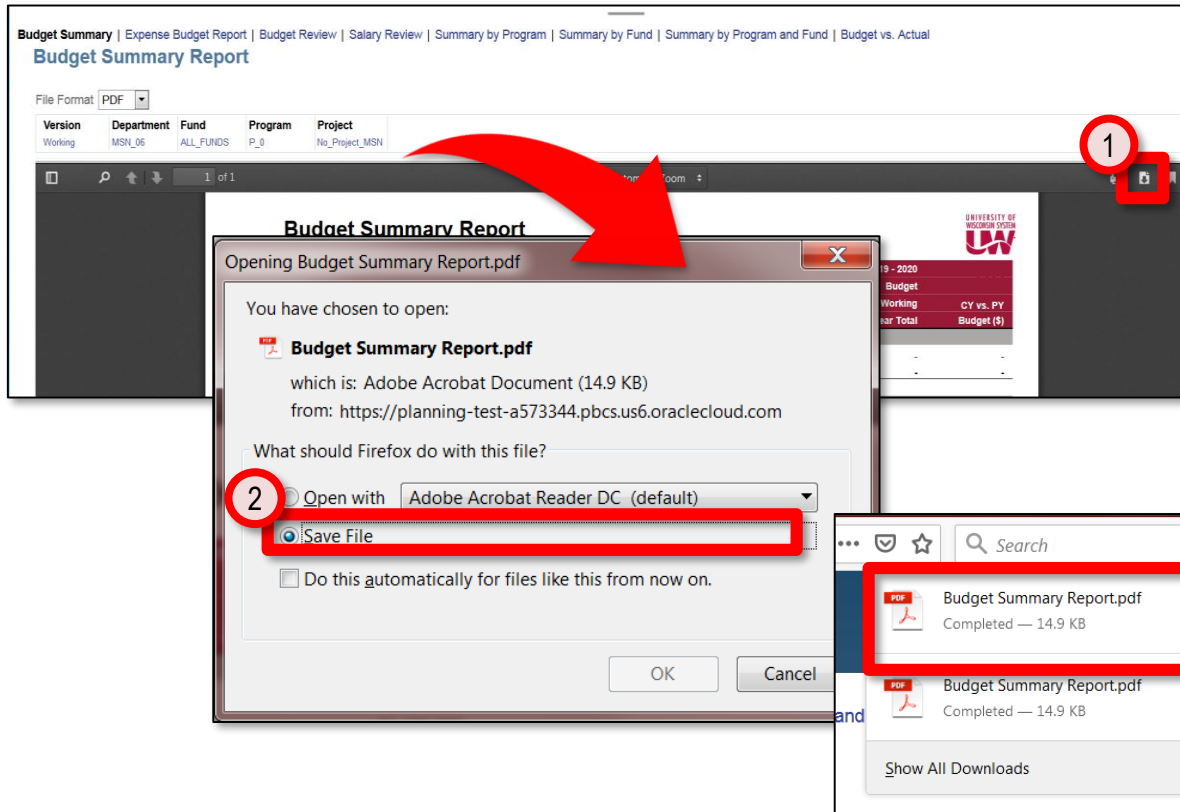


**Budget Summary Report**

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

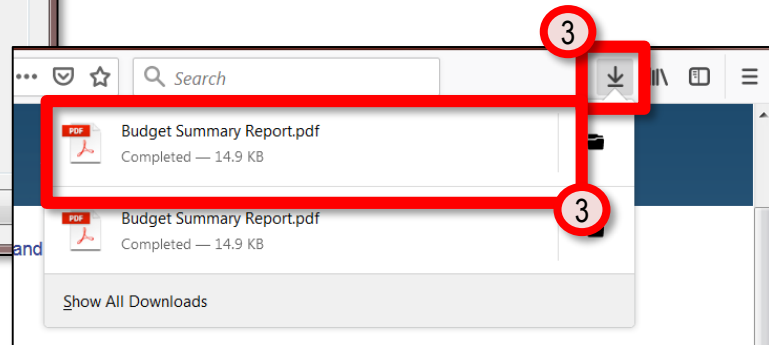
Open the file once downloaded and it will display in PDF format.

# 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.



# Budget Summary PDF Format in Internet Explorer

Internet Explorer

What do you want to do with Budget Summary Report.pdf?

From: planning-test-a573344.pbc.us6.oracle

1

→ Open  
The file won't be saved automatically.

→ Save

→ Save as

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

Budget Summary Report

File Format PDF

Version	Department	Fund	Program	Project
Working	MSN_06	ALL_FUNDS	P_0	No_Project_MSN

3

The Budget Summary Report.pdf download has completed.

Open Open folder View downloads

2

File name: Budget Summary Report.pdf

Save as type: (Adobe Acrobat Document (\*.pdf))

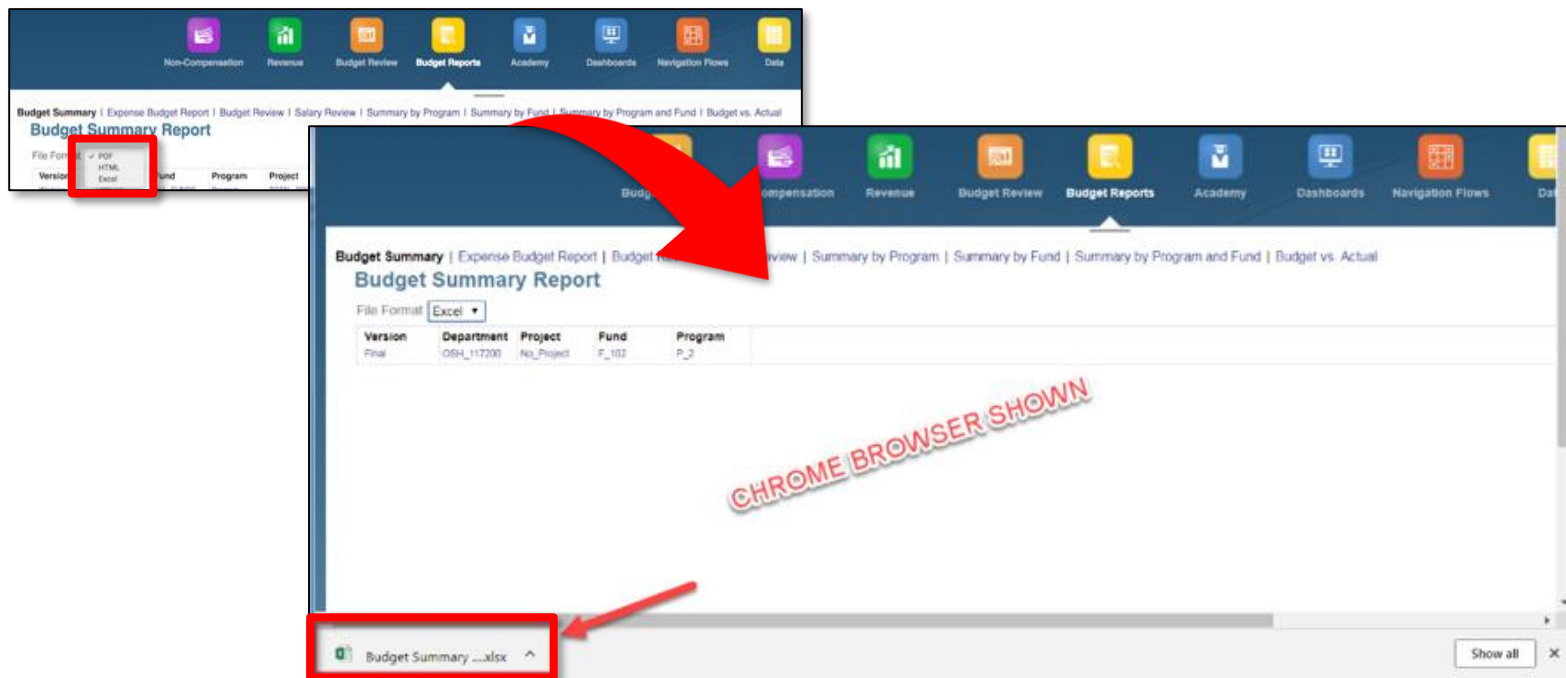
Save Cancel

To download reports:

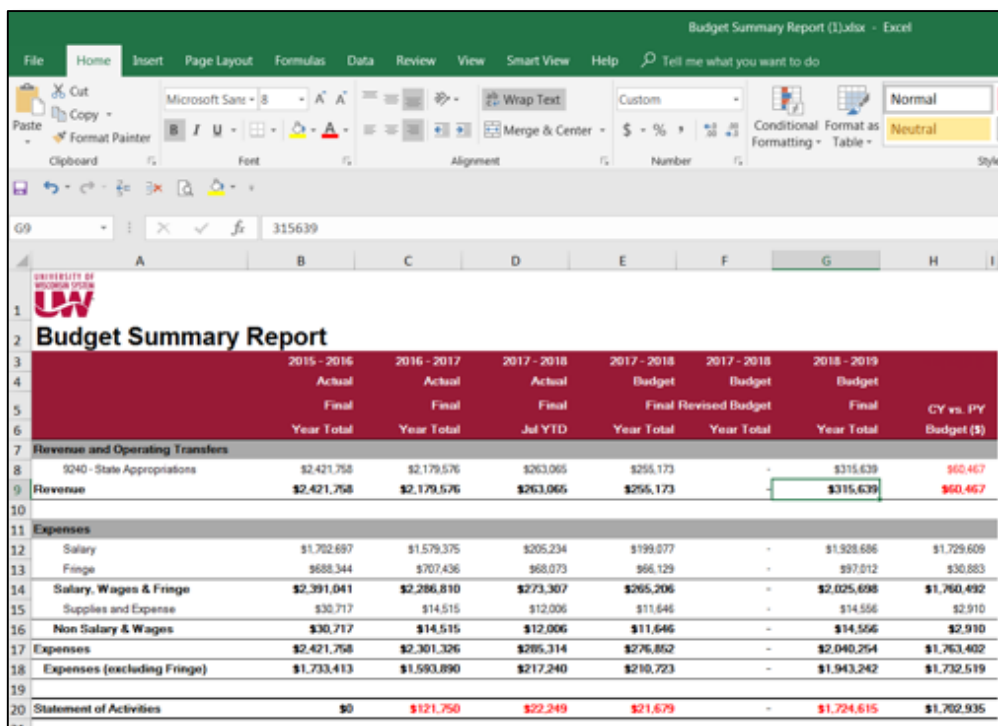
1. Click the **Open** option (**Save** or **Save as** if desired)
2. Name the report on the **File Name** field
3. Click on **Open**

# 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**.



# Budget Summary in Excel Format - Chrome



	2015 - 2016	2016 - 2017	2017 - 2018	2017 - 2018	2017 - 2018	2018 - 2019	
	Actual	Actual	Actual	Budget	Budget	Budget	
	Final	Final	Final	Final Revised Budget		Final	CY vs. PY Budget (\$)
	Year Total	Year Total	Jul YTD	Year Total	Year Total	Year Total	
<b>Revenue and Operating Transfers</b>							
9240 - State Appropriations	\$2,421,758	\$2,179,576	\$263,065	\$255,173	-	\$315,639	\$60,467
<b>Revenue</b>	<b>\$2,421,758</b>	<b>\$2,179,576</b>	<b>\$263,065</b>	<b>\$255,173</b>		<b>\$315,639</b>	<b>\$60,467</b>
<b>Expenses</b>							
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	-	\$97,912	\$30,583
<b>Salary, Wages &amp; Fringe</b>	<b>\$2,391,041</b>	<b>\$2,286,810</b>	<b>\$273,307</b>	<b>\$265,206</b>		<b>\$2,026,598</b>	<b>\$1,760,192</b>
Supplies and Expense	\$30,717	\$14,515	\$12,006	\$11,646	-	\$14,556	\$2,910
<b>Non Salary &amp; Wages</b>	<b>\$30,717</b>	<b>\$14,515</b>	<b>\$12,006</b>	<b>\$11,646</b>		<b>\$14,556</b>	<b>\$2,910</b>
<b>Expenses</b>	<b>\$2,421,758</b>	<b>\$2,301,326</b>	<b>\$285,314</b>	<b>\$276,852</b>		<b>\$2,040,254</b>	<b>\$1,763,102</b>
<b>Expenses (excluding Fringe)</b>	<b>\$1,733,413</b>	<b>\$1,593,890</b>	<b>\$217,240</b>	<b>\$210,723</b>		<b>\$1,943,242</b>	<b>\$1,732,519</b>
<b>Statement of Activities</b>	<b>\$0</b>	<b>\$121,750</b>	<b>\$22,249</b>	<b>\$21,679</b>		<b>\$1,724,615</b>	<b>\$1,702,935</b>

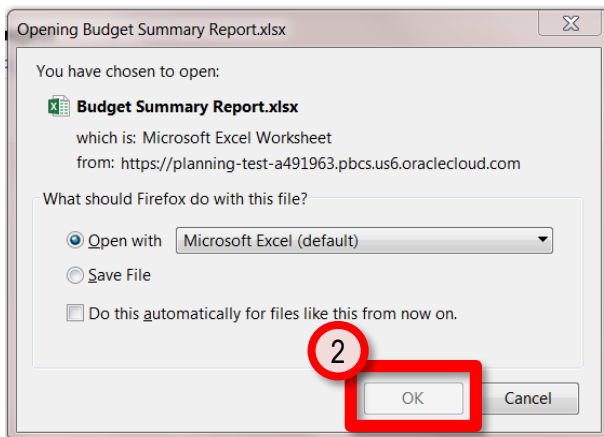
The Excel file is now downloaded and can be opened.



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.**

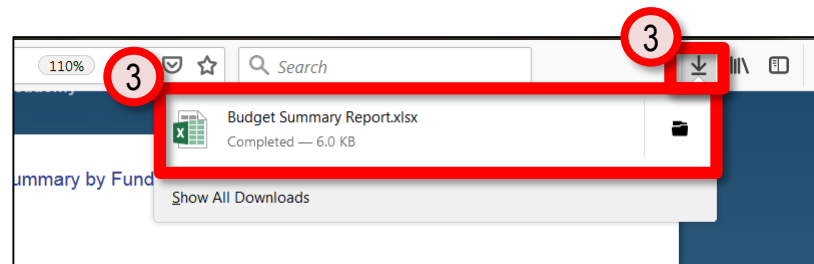
# Budget Summary in Excel Format – Firefox

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.



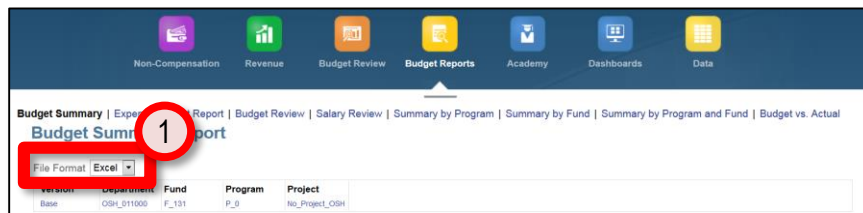
Unlike Chrome, when Excel is selected in the **File Format** option, the “Open with” pop up will display before downloading the report.

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.



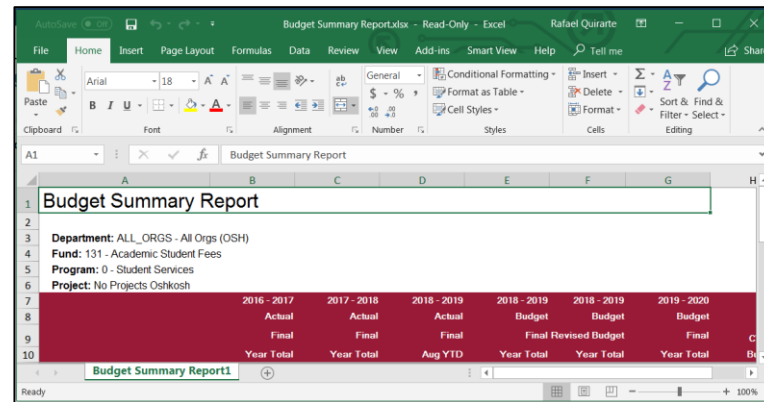
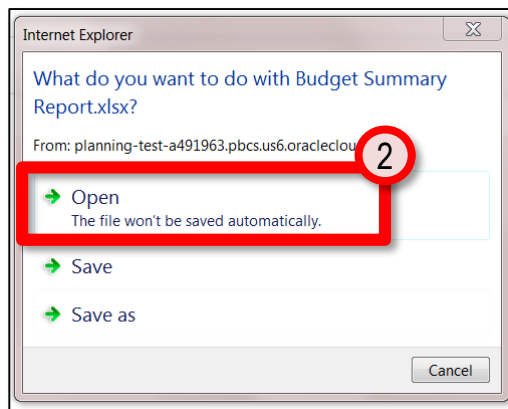
# Budget Summary in Excel Format – Internet Explorer

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.

The screenshot shows a web interface for the Expense Budget Report. At the top, there is a navigation bar with icons for Non-Compensation, Revenue, Budget Review, Budget Reports (highlighted), Academy, Dashboards, and Data. Below the navigation bar, the 'Expense Budget Report' tab is selected. Underneath, there is a 'File Format' dropdown menu set to 'HTML'. Below that, there is a table with three columns: 'Department', 'Version', and 'Project'. The table contains one row with the following values: 'UWOSH' for Department, 'Base' for Version, and 'No\_Project\_OSH' for Project.

Department	Version	Project
UWOSH	Base	No_Project_OSH



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



# Expense Budget Report

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

The screenshot displays the 'Expense Budget Report' interface. At the top, a navigation bar includes icons for Non-Compensation, Revenue, Budget Review, Budget Reports (highlighted), Academy, Dashboards, and Data. Below this, a breadcrumb trail shows the path: Budget Summary | **Expense Budget Report** | Budget Review | Salary Review | Summary by Program | Summary by Fund | Summary by Program and Fund | Budget vs. Actual.

The main section is titled 'Expense Budget Report' and includes a 'File Format' dropdown set to 'HTML'. Below this are filters for Department (UWOSH), Version (Base), and Project (No\_Project\_OSH). A red arrow points from the 'Expense Budget Report' link in the breadcrumb trail to the main report area.

The report area features the University of Wisconsin System logo and a table titled '2019 - 2020' with the following structure:

2019 - 2020											
Input											
Budget											
Total Year											
Department	Fund	Program	Faculty Salary	Academic Staff Salary	University Staff Salary	LTE Salary	Student Salary	Salary	Fringe	Salary, Wages & Fringe	Expenses
UW OSH ALL_ORGS (OSH)	Fund Total	0 - Student Services	\$4,710	\$6,377,727	\$1,483,284	\$116,317	\$1,471,431	\$9,453,469	\$104,010	\$9,557,479	\$9,557,479
		1 - Institutional Support	\$64,398	\$3,861,163	\$2,104,698	\$22,507	\$339,777	\$6,392,531		\$6,392,531	\$6,392,531
		2 - Instruction	\$22,387,558	\$10,554,052	\$2,333,744	\$396,684	\$427,734	\$36,099,775	\$14,112	\$36,113,887	\$36,113,887
		4 - Research	\$8,451	\$271,202	\$51,314		\$58,539	\$389,506		\$389,506	\$389,506
		5 - Public Service		\$746,461	\$192,647	\$228,303	\$285,025	\$1,452,436		\$1,452,436	\$1,452,436
		6 - Academic Support	\$84,768	\$5,205,959	\$1,948,273	\$101,773	\$1,081,303	\$8,422,068		\$8,422,068	\$8,422,068
		7 - Operation and Maintenance									

# Budget Review Report

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.

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

### Budget Review

File Format: HTML

Version	Department	Fund	Program	Project
Base	UWOSH	ALL_FUNDS	P_2	No_Project_OSH



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.

# Budget Review Report

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

**Budget Review**

File Format:

Version: Base | Department: UWOSH | Fund: ALL\_FUNDS | Program: P\_2

**Budget Review**

University of Wisconsin System

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

# Salary Review Report

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.

The screenshot displays the University of Wisconsin System Budget Reports interface. The top navigation bar includes icons for Non-Compensation, Revenue, Budget Review, Budget Reports (highlighted), Academy, Dashboards, and Data. Below the navigation bar, the 'Salary Review' tab is selected and highlighted with a red box. The 'File Format' dropdown menu is also highlighted with a red box, showing 'PDF' as the selected option. The main content area displays the 'Salary Trend Review' report for the University of Wisconsin System. The report includes a table with columns for various years and budget types, and a 'Salary Comparison' section.

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

# 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

UNIVERSITY OF WISCONSIN SYSTEM  
**UW**

	2016 - 2017	2017 - 2018	2018 - 2019	2018 - 2019	2018 - 2019	2019 - 2020	
	Actual	Actual	Actual	Budget	Budget	Budget	
	Final	Final	Final	Final	Revised Budget	Input	CY vs. PY
	Year Total	Year Total	Aug YTD	Year Total	Year Total	Year Total	Budget (\$)
<b>Salary Comparison</b>							
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.

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

**Budget Summary by Program**

File Format: **HTML**

Department: UWOSH | Version: Base | Project: No\_Project\_OSH | Fund: ALL\_FUNDS

**Budget Summary by Program**  
Expenses

UNIVERSITY OF WISCONSIN SYSTEM  
**UW**

Page: A\_EXPENSE

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

# Summary by Fund

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

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

**Budget Summary by Fund**

File Format: HTML

Version	Department	Program	Project
Base	UWOSH	P_2	No_Project_OSH

**Budget Summary by Fund**

	2019 - 2020									
	Budget									
	Year Total									
	Input									
	GPR/Tuition	TUI	TB	AUX	OP REC	FICR	GGC	OTHER	FFA	REV
<b>Revenue</b>										
► 9240 - State Appropriations	\$1,700,000	-	-	-	-	-	-	-	-	-
<b>Revenue</b>	<b>\$1,700,000</b>									
<b>Expenses</b>										
► Salary	\$30,166,511	\$3,902,888	-	\$12,231	\$1,363,915	-	\$518,043	-	\$136,187	
► Fringe	\$4,000	\$10,112	-	-	-	-	-	-	-	
<b>Salary, Wages &amp; Fringe</b>	<b>\$30,170,511</b>	<b>\$3,913,000</b>		<b>\$12,231</b>	<b>\$1,363,915</b>		<b>\$518,043</b>		<b>\$136,187</b>	

# Summary by Program and Fund

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

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

Budget Summary by Program and Fund

File Format: HTML

Department: UWOSH | Version: Base | Project: No\_Project\_OSH

**Budget Summary by Program and Fund**  
Expenses

UNIVERSITY OF WISCONSIN SYSTEM  
UW

Page: A\_EXPENSE

2019 - 2020												
Budget												
Base												
Year Total												
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	-	-	\$1,709,090	\$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.

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

**Budget vs. Actual - Monthly**

File Format: **HTML**

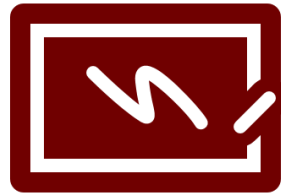
Department: UWOSH | Fund: ALL\_FUNDS | Program: P\_2 | Project: No\_Project\_OSH

**Budget vs. Actual - Monthly**

UNIVERSITY OF WISCONSIN SYSTEM  
**UW**

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

# 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.