

6.18 – Live CAT View in Planning Allocation

Overview

To assist divisions with real time review of CAT and AAP budget and FTE data, a view has been developed inside of the Planning Allocation application titled “Live CAT View”. This view will display CAT and APP data based on selected criteria (see below for further information).

Accessing the Live CAT View

The Live CAT View is located inside of the Planning Allocation system. Once logged into the application you should click on the “Live CAT View” tile.

The screenshot displays the UWSA Planning Allocation System interface. At the top left is the University of Wisconsin System logo. The main heading reads "Welcome to the UWSA Planning Allocation System". Below this, there are two dropdown menus: "Planning Allocation for" set to "Madison Budget" and "Fiscal Year" set to "2020". A central box titled "Select the Desired Transaction:" contains several buttons: "Reference Number Inquiry", "Reference Number Update", "Single Allocation Inquiry", "Single Allocation Update", "Multiple Allocation Inquiry", "Multiple Allocation Update", "Allocation Summary (PADS)", "Reference Number Conversion", "Table Maintenance", and "Reports". The "Live CAT View" button is highlighted with a red border. Below this box is a "Logoff" button.

After clicking on the Live CAT View tile the following screen should appear:

2019-20 Planning Allocation Current Budgeted Positions - Madison Budget

Query by Budget Unit, Fund, Fund Group

Unit Fund Project Program

Fiscal Yr OR Fund Grp

Retrieve

CURRENT LIVE FEED BUDGETED FTE AND DOLLAR AMOUNTS FOR

PROGRAM		SALARY CLASS		FTE	Amount
0 Student Services	<input type="text"/>	Faculty	<input type="text"/>	<input type="text"/>	<input type="text"/>
1 Institutional Support	<input type="text"/>	Academic Staff	<input type="text"/>	<input type="text"/>	<input type="text"/>
2 Instruction	<input type="text"/>	University Staff	<input type="text"/>	<input type="text"/>	<input type="text"/>
3 Hospitals	<input type="text"/>	University Staff LTE	<input type="text"/>	<input type="text"/>	<input type="text"/>
4 Research	<input type="text"/>	Student Help	<input type="text"/>	<input type="text"/>	<input type="text"/>
5 Public Service	<input type="text"/>	Graduate Assistant - PA	<input type="text"/>	<input type="text"/>	<input type="text"/>
6 Academic Support	<input type="text"/>	Graduate Assistant - RA	<input type="text"/>	<input type="text"/>	<input type="text"/>
7 Physical Plant	<input type="text"/>	Graduate Assistant - TA	<input type="text"/>	<input type="text"/>	<input type="text"/>
8 Auxiliary Entr	<input type="text"/>	Postgrad Trainee	<input type="text"/>	<input type="text"/>	<input type="text"/>
9 Financial Aid	<input type="text"/>	Other	<input type="text"/>	<input type="text"/>	<input type="text"/>
F Farm Operations	<input type="text"/>				
TOTAL	<input type="text"/>	TOTAL	<input type="text"/>	<input type="text"/>	<input type="text"/>

FTE	
PERMANENT	<input type="text"/>
GRADUATE	<input type="text"/>
TOTAL	<input type="text"/>

Main Menu Next Fund Print

In the “Query by Budget Unit, Fund, Fund Group” section you can select your desired criteria for retrieval of CAT and AAP data. You can base your selection on the following parameters:

- Unit: This allows you to select a Division, Department, or DepartmentID. You must use “A” in front of your selection (Axx, Axxxx, Axxxxxx)
- Fiscal Yr: This is default to 2020, there should not be a need to change but you can adjust.
- Fund: Select the fund you want to see, leaving this blank will bring in all funds
- Fund Grp: Drop down selection of specific fund groupings. Leaving this blank will revert to the selectin you made for Fund.
- Project: Select the project you want to see, leaving this blank will bring in all project and non-project data
- Program: Select the program, you want to see, leaving this blank will bring in all project and non-project data.

In the below example we’re using department A0205 in the “Unit” section and fund 101 in the “Fund” section. One you have made your selections click the “Retrieve” button in the upper right hand section

of the view. Results will then display if there are CAT or APP entries associated with the criteria you have selected.

2019-20 Planning Allocation Current Budgeted Positions - Madison Budget

Query by Budget Unit, Fund, Fund Group

Unit Fund Project Program

Fiscal Yr OR Fund Grp

CURRENT LIVE FEED BUDGETED FTE AND DOLLAR AMOUNTS FOR

PROGRAM		SALARY CLASS		FTE	Amount
0 Student Services	<input type="text"/>	Faculty	<input type="text"/>	<input type="text"/>	<input type="text"/>
1 Institutional Support	<input type="text"/>	Academic Staff	<input type="text"/>	<input type="text"/>	<input type="text"/>
2 Instruction	<input type="text"/>	University Staff	<input type="text"/>	<input type="text"/>	<input type="text"/>
3 Hospitals	<input type="text"/>	University Staff LTE	<input type="text"/>	<input type="text"/>	<input type="text"/>
4 Research	<input type="text"/>	Student Help	<input type="text"/>	<input type="text"/>	<input type="text"/>
5 Public Service	<input type="text"/>	Graduate Assistant - PA	<input type="text"/>	<input type="text"/>	<input type="text"/>
6 Academic Support	<input type="text"/>	Graduate Assistant - RA	<input type="text"/>	<input type="text"/>	<input type="text"/>
7 Physical Plant	<input type="text"/>	Graduate Assistant - TA	<input type="text"/>	<input type="text"/>	<input type="text"/>
8 Auxiliary Entr	<input type="text"/>	Postgrad Trainee	<input type="text"/>	<input type="text"/>	<input type="text"/>
9 Financial Aid	<input type="text"/>	Other	<input type="text"/>	<input type="text"/>	<input type="text"/>
F Farm Operations	<input type="text"/>				
TOTAL	<input type="text"/>	TOTAL	<input type="text"/>	<input type="text"/>	<input type="text"/>

FTE	
PERMANENT	<input type="text"/>
GRADUATE	<input type="text"/>
TOTAL	<input type="text"/>

The results will be displayed in the “CURRENT LIVE FEED BUDGETED FTE AND DOLLAR AMOUNTS FOR” section of the view:

2019-20 Planning Allocation Current Budgeted Positions - Madison Budget

Query by Budget Unit, Fund, Fund Group

Unit Fund Project Program

Fiscal Yr OR Fund Grp

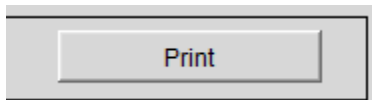
CURRENT LIVE FEED BUDGETED FTE AND DOLLAR AMOUNTS FOR

FISCAL YEAR: 2020 UNIT: A0205 FUND: 101 FUND GROUP: ALL PROJECT: ALL PROGRAM: ALL

PROGRAM		SALARY CLASS	
		FTE	Amount
0 Student Services	3,935,751	Faculty	177,461
1 Institutional Support	557,376	Academic Staff	3,690,564
2 Instruction	0	University Staff	625,102
3 Hospitals	0	University Staff LTE	0
4 Research	0	Student Help	0
5 Public Service	0	Graduate Assistant - PA	0
6 Academic Support	0	Graduate Assistant - RA	0
7 Physical Plant	0	Graduate Assistant - TA	0
8 Auxiliary Entr	0	Postgrad Trainee	0
9 Financial Aid	0	Other	0
F Farm Operations	0		
TOTAL	4,493,127	TOTAL	4,493,127

FTE	
PERMANENT	61.827400
GRADUATE	.000000
TOTAL	61.827400

The screen has been setup to print by clicking on the "Print" section.



If you have any questions please reach out to your budget analyst or send an email to planuw-msn-mbo@vc.wisc.edu.