PlanUW Processes

QUICK REFERENCE GUIDE

Multi-Year Forecast
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# Revision History

<table>
<thead>
<tr>
<th>Version</th>
<th>Key Revisions</th>
<th>Modified By</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>Initial Document Creation</td>
<td>Huron Consulting</td>
<td>11/16/2020</td>
</tr>
<tr>
<td>2.0</td>
<td>Drafted Multi-Year Forecast Content</td>
<td>Huron Consulting</td>
<td>12/11/2020</td>
</tr>
</tbody>
</table>
Multi-Year Forecast
PlanUW Multi-Year Forecast Tasks and Processes

The Multi-Year Forecast tile is a new edition to the homepage and extends the existing Current Year Forecast process by four years. The Multi Year Forecast process mimics the Forecast process with forms being divided into the similar sections such as:

- Salary, Wages and Fringe
- Non-Compensation
- Revenue
- Transfers
- Reports

The two pieces of *NEW Optional Functionality* that come with the Multi-Year Forecast are:

- The Driver-Based Models tile which gives users the optional ability to plan MYF Tuition, Segregated Fees, Housing, and Meal Plan Revenue using detailed Driver-Based Models.

- The Global % Change tile which gives users the optional ability to plan MYF using Global % Change inputs applied by Account to their existing Current Year Forecast.
There are three tabs for input and review:

- **Campus-Level** – Enter forecast amounts at ‘Campus-Level’ using Divisions, in By Account, By Division, By Account and Division Forms and use Campus-Level Review to see total results.

- **Division-Level** – Enter forecast amounts at ‘Divisional-Level’ using Divisions, in By Account, By Division, By Account and Division Forms and use Divisional-Level Review to see total results.

- **Sub-Department-Level** – Enter forecast amounts at ‘Sub-Department-Level’ using Sub-Departments, in By Account, By Sub-Department, By Account and Sub-Department Forms and use Sub-Department-Level Review to see total results.
Input Forms

• The Salary, Wages, and Fringe, Non-Compensation, and Revenue cards all contain input forms at Campus, Division and Sub-Department levels. Each level provides differing variations of the input forms and 1 review form.

Action Menus

• Some forms will have additional action menu functions that you can use to perform:
  1. Open Forecast Accounts – adding an Account, Fund, Sub-Department or Division that did not have previous activity and may not be displayed on the form
  2. Remove Forecast Accounts – removing an Account, Fund, Sub-Department or Division that did not have previous activity and is displayed on the form

Form Suppression

• Some forms will not display members that have no previous activity in Actuals or Budget. Use the Action menu “Open Forecast Accounts” to add missing members.

Suppression is used to reduce the number of lines on a form. When suppression is turned on a user must insert a “Wedge” to add new lines to the form.

Certain forms that do not get as large do not need suppression turned on and therefore do not require users to insert “Wedges”.

PlanUW Multi-Year Forecast Column Definitions

Each form in these tiles contains specific columns as part of its standard layout. Here is a brief explanation of these titles.

<table>
<thead>
<tr>
<th>Column Title</th>
<th>Column Definitions for Input Tiles</th>
</tr>
</thead>
<tbody>
<tr>
<td>YTD</td>
<td>Year to Date – Total Actuals from July to the month displayed in the YTD column.</td>
</tr>
<tr>
<td>CY YTD vs PY YTD</td>
<td>Multi-Year to Date versus Previous Year to Date variance column. This column compares CY YTD Actuals vs PY YTD Actuals in the input cards.</td>
</tr>
<tr>
<td>Forecast Input</td>
<td>This column is the baseline forecast where the system has taken the Multi-Year budget and spread it based on 2 prior years of actuals.</td>
</tr>
<tr>
<td>Forecast Transfers</td>
<td>This column displays the budget transfers that have been respread by users in the Forecast Transfers card.</td>
</tr>
<tr>
<td>Campus/Divisional/Sub-Departmental Forecast Adjustment</td>
<td>This column is open for input. This is where users can add adjustments to the forecast on top of Forecast Input and Forecast Transfers.</td>
</tr>
<tr>
<td>View</td>
<td>These columns display posted Actuals or Budget data throughout the year.</td>
</tr>
</tbody>
</table>
Driver-Based Models
NEW Optional Functionality

Use this card to enter drivers to Forecast for Tuition, Segregated Fees, Housing and Meal Plans for multiple years.

- Enter drivers to manipulate the Total Tuition, Segregated Fees, Housing and Meal Plans for Multi-Year Forecast

To begin the driver data input and review process:

1. Click the **Multi-Year Forecast** tile to open the cluster
2. Click on the **Driver-Based Models** tile to open the forms

This process will open the Tuition, Segregated Fees, Housing and Meal Plans forecast input and review forms.

There are four tabs for input and review:

- **Tuition Forecast** – Model Tuition Revenue by Tuition Type via inputs including Headcount, Billing FTE, Retention %, New Enrollment %, Tuition Rate, Spring Factor, and Pool Reduction Factor to calculate Multi-Year Revenue using Tuition Rate % Change input for out-years.

- **Segregated Fees Forecast** – Model Segregated Fee Revenue via inputs including Fall & Spring FTE/Headcount, Annual Seg Fee Rate and Seg Fee % Collectible for out-years.

- **Housing Fees Forecast** – Model Housing Revenue by Room Type via inputs including Current Annual Housing Rate, Fall & Spring Occupancy, and Housing Fee % Collectible to calculate Multi-Year Revenue using Room Rate % Change input for out-years.

- **Meal Plan Forecast** – Model Meal Plan Revenue by Meal Plan Type via inputs including Current Annual Meal Plan Rate, Fall & Spring Enrollment, and Meal Plan Fee % Collectible to calculate Multi-Year Revenue using Meal Plan Rate % Change input for out-years.
Tuition Forecast - Driver Based Models

NEW Optional Functionality

Tuition Forecast – Model Tuition Revenue by Tuition Type via inputs including Headcount, Billing FTE, Retention %, New Enrollment %, Tuition Rate, Spring Factor, and Pool Reduction Factor to calculate Multi-Year Revenue using Tuition Rate % Change input for out-years.

Prior to Tuition Modelling, your Tuition User Variable needs to be selected.
MYF Tuition Dept: Select specific Tuition Sub-Department member to work in the forms.

User Variable member selection can be updated in two ways:

- From User Preferences (see section Set User Variables)
- Directly on the form from POV
Provides forecasting to a single Division/Sub-Department for multi-year forecast.

1. The Point of View shows your selected MYF Tuition Sub-Department user variable and Fund. Optionally, you can change your MYF Tuition Sub-Department directly on this form, by clicking MYF Tuition Dept and changing your selection.

2. Data can be input in columns with white cells for:
   a) Fall Headcount
   b) Fall Billing FTE Factor Retention %
   c) New Enrollment %
   d) Fall Tuition Rate
   e) Spring Factor
   f) Tuition Rate % Change
   g) Pool Reduction Factor

3. Scroll right to enter data in more columns valid for data entry.
1. Enter Tuition Type Name followed by data in the Fall Headcount and Fall Billing FTE Factor column for current year.

2. Enter data and % for future years on the form.

3. Once done, click **Save** to save the sheet.

4. Click OK in pop up message.
Additional Tuition Type Rows– Driver Based Models

NOTE: This is Optional

To expose additional Tuition Type row, go to the 'Actions Menu' and click 'Display Additional Tuition Lines'. The Display Additional Tuition Lines action will display the Extended form [MYF - Tuition - Extended] will show 20 "Other" Tuition types per category.

To show additional Tuition Type rows:

1. Click on the Action menu
2. Select Display Additional Tuition Lines

Note: This form can be accessed via the Action Menu at any time. This form is not suppressed.
Push Tuition Data to Forecast – Driver Based Models

Note: This step can be completed from the Tuition Modeling Form or the Review Form via the Actions Menu and does not need to be completed twice.

After saving tuition data and data is ready to be pushed:

1. Cells will appear white when data is saved. Review calculated data in the grey columns.

2. If data is ready to be pushed to Forecast, click on the Action menu

3. Select Push Tuition Data to Forecast
After selecting Push Tuition Data to Forecast from the Action Menu, a prompt will pop up:

1. Select **Tuition Fund** from the prompt by clicking on .
2. When done, click **Launch**.
3. Confirm that MY_Tuition_Data Mapping was successful. Click **OK**.
Push Tuition Data to Reports – Driver Based Models

Note: This step can be completed from the Tuition Modeling Form or the Review Form via the Actions Menu and does not need to be completed twice.

To Push Tuition Data to Reports:

1. Click on the 'Actions' Menu
2. Select 'Smart Push Details'
3. On Smart Push pop up, click on Tuition Forecast.
4. Confirm that Smart Push was successful. Click OK
Tuition Model Review – Driver Based Models

**Note:** This step can be completed from the Tuition Modeling Form or the Review Form via the Actions Menu and does not need to be completed twice.

This form allows user to view all calculated data on one screen. If data is ready to be pushed to forecast again or was not pushed before:

1. Click on the **Action** menu
2. Select **Push Tuition data to Forecast**

*All cells will be read-only*
After selecting Push Tuition Data to Forecast from the Action Menu, a prompt will pop up:

1. Select **Tuition Fund** from the prompt by clicking on .
2. When done, click **Launch**.
3. Confirm that MY_Tuition_Data Mapping was successful. Click **OK**.

Table below shows the data mapping of Tuition Data after being pushed into Forecast.

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Tuition Model</th>
<th>Multi-Year Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Total Tuition Revenue - UG Headcount</td>
<td>Undergrad Tuition Forecast</td>
</tr>
<tr>
<td></td>
<td>Total Tuition Revenue - Total Grad Headcount</td>
<td>Grad Tuition Forecast</td>
</tr>
<tr>
<td></td>
<td>Total Tuition Revenue - Total Other Students + International</td>
<td>Other Tuition Forecast</td>
</tr>
<tr>
<td>Department</td>
<td>MYF Tuition Department</td>
<td>MYF Tuition Department</td>
</tr>
<tr>
<td>Version</td>
<td>*Preselected and hidden on the form</td>
<td>Input</td>
</tr>
<tr>
<td>Fund</td>
<td>Selected Fund in POV *Fund 131 is default</td>
<td>Selected Fund in POV *Fund 131 is default</td>
</tr>
</tbody>
</table>

**Note:** Data gets pushed from sub-departmental level to Base of every Campus/Div/Dept Forecast version.
Segregated Fees Forecast - Driver Based Models

NEW Optional Functionality

Segregated Fees Forecast – Model Segregated Fee Revenue via inputs including Fall & Spring FTE/Headcount, Annual Seg Fee Rate and Seg Fee % Collectible for out-years.

The Sub-Departments included in the Segregated Fee Modeling Form are part of an alternate Department hierarchy created for this model to only pull applicable sub-departments.

The list of sub-departments for each institution was created based on historical Segregated Fee Actuals.

If a sub-department should be added/removed, please contact the Admin team via email at planuw@uwsa.edu
Seg Fee Modeling Form - Driver-Based Models

1. Scenario is locked in the POV to Forecast. Segregated Fee Sub-Departments are displayed unsuppressed.

2. Data can be input in columns with white cells for:
   a) Fall FTE/Headcount
   b) Spring FTE/Headcount
   c) Annual Seg Fee Rate
   d) Seg Fee% Collectible

1. Enter data points to calculate Total Seg Fee Revenue across the forecasting years.

2. Once done, click Save to save the sheet.

3. Click OK in pop up message.
Push SegFee Data to Forecast – Driver Based Models

**NOTE:** This step can be completed from the Seg Fee Modeling Form or the Review Form via the Actions Menu and does not need to be completed twice.

After saving Seg Fee data:

1. Cells will appear white when data is saved. Review calculated data in the grey columns.

2. If data is ready to be pushed to Forecast, click on the **Action** menu

3. Select **Push Seg Fee Data to Forecast**

4. Confirm that MY_SegFee_Data Mapping was successful. Click **OK**.
Push Seg Fee Data to Reports – Driver Based Models

**NOTE:** This step can be completed from the Seg Fee Modeling Form or the Review Form via the Actions Menu and does not need to be completed twice.

To Push Seg Fee Data to Reports:

1. Click on the *Actions* Menu
2. Select *Smart Push Details*
3. On Smart Push pop up, click on *Seg Fee Forecast*.
4. Confirm that Smart Push was successful. Click OK.
Seg Fee Model Review – Driver Based Models

NOTE: Push SegFee Data to Forecast can be completed from the Seg Fee Modeling Form or the Review Form via the Actions Menu and does not need to be completed twice.

This form allows user to view all calculated data on one screen. If data is ready to be pushed to forecast:

1. Click on the Action menu
2. Select Push Seg Fee data to Forecast
3. Click OK.
Push Seg Fee Data to Reports – Driver Based Models

**NOTE:** Push SegFee Data to Reports can be completed from the Seg Fee Modeling Form or the Review Form via the Actions Menu and does not need to be completed twice.

To Push Seg Fee Data to Reports:

5. Click on the ‘Actions’ Menu

6. Select ‘Smart Push Details’

7. On Smart Push pop up, click on Seg Fee Forecast.

8. Confirm that Smart Push was successful. Click OK.
Table below shows the data mapping of Seg Fee Data after being pushed into Forecast.

<table>
<thead>
<tr>
<th>Dimension</th>
<th>SegFee Model</th>
<th>Multi-Year Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Total Seg Fee Revenue</td>
<td>Segregated Fees Forecast</td>
</tr>
<tr>
<td>Department</td>
<td>SegFee Sub-Departments on Form</td>
<td>SegFee Sub-Departments</td>
</tr>
<tr>
<td>Version</td>
<td>*Preselected and hidden on the form</td>
<td>Input</td>
</tr>
<tr>
<td>Fund</td>
<td>*Preselected and hidden on the form</td>
<td>Fund 128</td>
</tr>
</tbody>
</table>

Note: Data gets pushed from sub-departmental level to Base of every Campus/Div/Dept Forecast version.
Housing Forecast - Driver Based Models

NEW Optional Functionality – Housing Modeling

Housing Fees Forecast – Model Housing Revenue by Room Type via inputs including Current Annual Housing Rate, Fall & Spring Occupancy, and Housing Fee % Collectible to calculate Multi-Year Revenue using Room Rate % Change input for out-years.

Prior to Housing Modelling, your Housing User Variable needs to be selected.

**MYF Housing Dept:** Select specific Housing Sub-Department member to work in the forms

User Variable member selection can be updated in two ways:

- From User Preferences (see section Set User Variables)
- Directly on the form from POV
Housing Revenue Modeling Form - Driver-Based Models

Provides forecasting to a single Division/Sub-Department for multi-year forecast.

1. The Point of View shows your selected MYF Housing Sub-Department user variable. Optionally, you can change your MYF Tuition Sub-Department directly on this form, by clicking MYF Housing Dept and changing your selection.

2. Data can be input in columns with white cells for:
   a) Room Type Name
   b) Annual Current Year Housing Rate
   c) Room Rate % Change
   d) Fall Housing Occupancy
   e) Spring Housing Occupancy
   f) Housing Fee % Collectible

3. Scroll right to enter data in more columns valid for data entry.
1. Enter Room Type Name followed by Current Housing Rate column for current year.
2. Enter data and % for future years on the form.
3. Once done, click Save to save the sheet.
4. Click OK in pop up message.
Push Housing Data to Forecast – Driver Based Models

NOTE: This step can be completed from the Housing Modeling Form or the Review Form via the Actions Menu and does not need to be completed twice.

After saving housing data:

1. Cells will appear white when data is saved. Review calculated data in the grey columns.

2. If data is ready to be pushed to Forecast, click on the Action menu

3. Select Push Housing Data to Forecast

4. Click OK.
Push Forecast Data to Reports – Driver Based Models

NOTE: This step can be completed from the Housing Modeling Form or the Review Form via the Actions Menu and does not need to be completed twice.

To Push Housing Data to Reports:

1. Click on the 'Actions' Menu
2. Select ‘Smart Push Details’
3. On Smart Push pop up, click on Housing Forecast.
4. Confirm that Smart Push was successful. Click OK.
Housing Model Review – Driver Based Models

NOTE: Push Housing Model data to Forecast can be completed from the Housing Modeling Form or the Review Form via the Actions Menu and does not need to be completed twice.

All cells will be read-only.

This form allows user to view all calculated data on one screen.

1. Review all calculated data in Total Housing Revenue.
2. Click on the Action menu
3. Select Push Housing Model data to Forecast
4. Click OK.

If needed, push Housing forecast data to reports via Action Menu as you would on the Housing Modeling Form.
Table below shows the data mapping of Housing Data after being pushed into Forecast.

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Housing Model</th>
<th>Multi-Year Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Total Housing Revenue – Room Total</td>
<td>Housing Forecast</td>
</tr>
<tr>
<td>Department</td>
<td>MYF Housing Department</td>
<td>MYF Housing Department</td>
</tr>
<tr>
<td>Version</td>
<td>*Preselected and hidden on the form</td>
<td>Input</td>
</tr>
</tbody>
</table>

Note: Data gets pushed from sub-departmental level to Base of every Campus/Div/Dept Forecast version.
Meal Plan Forecast - Driver Based Models

NEW Optional Functionality

Meal Plan Forecast – Model Meal Plan Revenue by Meal Plan Type via inputs including Current Annual Meal Plan Rate, Fall & Spring Enrollment, and Meal Plan Fee % Collectible to calculate Multi-Year Revenue using Meal Plan Rate % Change input for out-years.

Prior to Meal Plan Modeling, your Meal Plan User Variable needs to be selected.

MYF Meal Plan Dept: Select specific Meal Plan Sub-Department member to work in the forms.

User Variable member selection can be updated in two ways:

- From User Preferences (see section Set User Variables)
- Directly on the form from POV
Meal Plan Revenue Modeling Form - Driver-Based Models

Provides forecasting to a single Division/Sub-Department for multi-year forecast.

1. The Point of View shows your selected MYF Meal Plan Sub-Department user variable. Optionally, you can change your MYF Meal Plan Sub-Department directly on this form, by clicking MYF Meal Plan Dept and changing your selection.

2. Data can be input in columns with white cells for:
   a) Meal Plan Name
   b) Current Annual Meal Plan Rate
   c) Meal Plan Rate % Change
   d) Fall Meal Plan Enrollment
   e) Spring Meal Plan Enrollment
   f) Meal Plan Fee % Collectible

3. Scroll right to enter data in more columns valid for data entry.
1. Enter Meal Plan Name followed by Current Annual Meal Plan Rate column for current year.
2. Enter data and % for future years on the form.
3. Once done, click **Save** to save the sheet.
4. Click OK in pop up message
Push Meal Plan Data to Forecast – Driver Based Models

NOTE: This step can be completed from the Meal Plan Modeling Form or the Review Form via the Actions Menu and does not need to be completed twice.

After saving Meal Plan data:

1. Cells will appear white when data is saved. Review calculated data in the grey columns.

2. If data is ready to be pushed to Forecast, click on the Action menu

3. Select Push Meal Plan Data to Forecast

4. Click OK.
Push Forecast Data to Reports – Driver Based Models

**NOTE:** This step can be completed from the Meal Plan Modeling Form or the Review Form via the Actions Menu and does not need to be completed twice.

To Push Meal Plan Data to Reports:

1. Click on the 'Actions' Menu
2. Select ‘Smart Push Details’
3. On Smart Push pop up, click on Meal Plan Forecast.
4. Confirm that Smart Push was successful. Click OK.
Meal Plan Review – Driver Based Models

**NOTE:** Push Meal Plan data to Forecast can be completed from the Meal Plan Modeling Form or the Review Form via the Actions Menu and does not need to be completed twice.

All cells will be read-only.

This form allows user to view all calculated data on one screen. If data is ready to be pushed to forecast:

1. Review all calculated data in **Total Food Service Revenue**.
2. Click on the **Action** menu
3. Select **Push Meal Plan data to Forecast**
4. Click **OK**.

If needed, push Meal Plan forecast data to reports via Action Menu as you would on the Meal Plan Modeling Form.
Table below shows the data mapping of Meal Plan Data after being pushed into Forecast.

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Meal Plan Model</th>
<th>Multi-Year Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Total Meal Plan Revenue - Meal Plan Total</td>
<td>Total Food Service Revenue</td>
</tr>
<tr>
<td>Department</td>
<td>MYF Meal Plan Department</td>
<td>MYF Meal Plan Department</td>
</tr>
<tr>
<td>Version</td>
<td>*Preselected and hidden on the form</td>
<td>Input</td>
</tr>
<tr>
<td>Fund</td>
<td>*Preselected and hidden on the form</td>
<td>Fund 128</td>
</tr>
</tbody>
</table>

**Note:** Data gets pushed from sub-departmental level to Base of every Campus/Div/Dept Forecast version.
Global % Change

Use this card to input Global % Changes for future years based on current year Forecast version amounts by Campus, Division and Sub-Department levels.

- View how Campus/Division/Sub-Department Forecast and Forecast Adjustments can be simulated to gain the full picture of your Forecast
- Review historical data, total Forecast and key variances scenarios

To begin the Global % Change data input process:

1. Click the Multi-Year Forecast tile to open the cluster
2. Click on the Global % Change tile to open the forms

This process will open the Global % Change – CampusFCST input form.
NEW Optional Functionality

NOTE:

• Only applicable if planning Current & Multi-Year Forecast at the **same version level** (Campus/Division/Sub-Dept)

• **MUST** be completed prior to input in following cards (Salary, Wages & Fringe, Non-Compensation, and Revenue)

• Do not use for GPR Tuition Funds

The Global % Change forms allows input of % changes for future years based on current year forecast amounts by Campus, Division and Sub-Department levels. Enter or make adjustments to Global % Change data to manipulate the prepopulated base Forecast.

• **Campus-Level** – Enter Global % Change amounts at ‘Campus-Level’ using Divisions.

• **Division-Level** – Enter Global % Change amounts at ‘Divisional-Level’ using Divisions.

• **Sub-Department-Level** – Enter Global % Change amounts at ‘Sub-Department-Level’ using Sub-Departments.
Provides Global % Change input to be applied to the prior year to calculate Multi-Year Forecast starting based on Current Year Forecast. If no data was entered the Forecast Adjustment will equal to the Current Year Campus Forecast.

1. The Point of View shows your selected Fund and Sub-Department. Optionally, you can change your Sub-Department and/or Fund directly on this form, by clicking the dimension and changing your selection.

2. Input data in Campus Forecast Adjustment Global % Change and Multi-Year Comments Columns. All other cells should be grey.
1. Enter Campus Forecast Adjustment **Global % Change** and **Multi-Year Comments** Columns.

2. Once done, click **Save** to save the sheet.

3. Click OK in pop up message.

**Note:** If data was entered to Global Change %, validate the data in Campus Forecast Adjustment has been calculated correctly based on the Current Year Campus Forecast and the Global % Change that was entered. If no data was entered in Global % Change, validate the data in Campus Forecast Adjustment is equal to the Current Year Campus Forecast.
Rinse and Repeat

This process for Global % Change form for the By Division and By Sub-Department levels are section are identical to the By Campus for except for being on the divisional or Sub-Departmental level. All processes are applicable in this section.
This section will cover the Campus-Level input for Salary, Wages & Fringe. The same process is applicable for the Division-Level and Department-Level inputs in Salary, Wages & Fringe. It is an abridged version of what was covered in the CYF Training.
Use this card to Forecast for Salary, Wages, and Fringe for Multi-Year Forecast.

- Enter adjustments to manipulate the prepopulated base Forecast for out years
- View how Forecast Base, Transfers, and Adjustments cumulate to gain the full picture of your Forecast
- Review historical data, total Forecast and key variances scenarios

To begin the multi-year salary data input and review process:

1. Click the **Multi-Year Forecast** tile to open the cluster
2. Click on the **Salary, Wages and Fringe** tile to open the forms

This process will open the Salary, Wages and Fringe input and review forms.

**Note:** The multi-year forms are very similar to current year forecast forms except for the additional columns for future year forecasts.
Campus-Level Salary, Wages and Fringe

**Campus-Level** – Enter forecast amounts at ‘Campus-Level’ using Divisions, in By Account, By Division, By Account and Division Forms and use Campus-Level Review to see total results.
Campus-Level By Account Form – Salary, Wages and Fringe

Provides forecasting to a single Division by Fund.

1. The Point of View section can be changed to the Division/Sub-Department and Fund member for your institution limited to your security profile

2. Input data in Multi-Year Forecast Adjustment and Comments Columns. All other cells should be grey.

3. Expand Year Total by clicking the plus sign to enter by Months. Functionality exists everywhere with a plus sign.
1. Enter Forecast Adjustments in the **Total Year** column.

2. Enter comments in the **Comment** column, if needed.

3. Once done, click **Save** to save the sheet.

4. Click **OK** in pop up message.
Campus-Level By Division Form – Salary, Wages and Fringe

Provides forecasting to Multiple Divisions by Account and Fund.

1. The Point of View section can be changed to the Account and Fund member for your institution limited to your security profile.

2. Input data in Forecast Adjustment Year Total and Comments Columns. All other cells should be grey

1. Enter Forecast Adjustment data in the Total Year column (or expand to enter each open Month)

2. Enter comments in the Comment column, if needed

3. Once done, click Save to save the sheet

4. Click OK in pop up message
Provides forecasting to **Multiple Divisions and Accounts** by Fund.

1. The Point of View section can be changed to the Fund member for your institution limited to your security profile

2. Input data in Forecast Adjustment **Year Total** and **Comments** Columns. All other cells should be grey
Open Forecast Accounts - Salary, Wages and Fringe

- If there was no data for a Division or Account combination, the members will not display in the form.

- The Open Forecast Accounts action will let you add a Division or Account to enter Forecast against.

To insert a wedge:

1. Click on the Action menu
2. Select Open Forecast Accounts
3. Select Division and/or Account and/or Fund using the selector
4. Click Launch
5. Click OK in pop up message
Remove Forecast Accounts - Salary, Wages and Fringe

- If a member with no Baseline Forecast for a Division or Account combination is unnecessary but is showing on the form
- The Remove Forecast Accounts action will let you remove a Division or Account from being displayed on the form

To insert a wedge:
1. Click on the Action menu
2. Select Remove Forecast Accounts
3. Select Division and/or Fund using the selector
4. Click Launch
5. Click OK in pop up message
Campus-Level By Account & Division Form – Salary, Wages and Fringe

1. Enter data in the **Total Year** column (by Total Year or Month)

2. Enter comments in the **Comment** column, if needed

3. Once done, click **Save** to save the sheet

4. Click **OK** in pop up message

**Note:** The Open/Remove Forecast Accounts functionality is available on this form.
Campus-Level Review – Salary, Wages and Fringe

Provides a historical comparison of the summarized Forecast at the Program Total and Project Total level.

1. The Point of View section can be changed to the Sub-Department member for your institution limited to your security profile.

2. Review data in Forecast Adjustment Year Total Columns and compare to Actuals and Budget Trends. All cells should be grey
Rinse and Repeat

The section above covered the Campus-Level input for Salary, Wages and Fringe, the same process is applicable for Campus-Level Input in the Non-Compensation and Revenue Cards.
Non-Compensation - Input and Review

Rinse and Repeat

This section will cover the Division-Level input for Non-Compensation. The same process is applicable for the Campus-Level and Department-Level inputs in Non-Compensation. It is an abridged version of what was covered in the CYF Training.
Use this card to Forecast for Non-Compensation.

- Enter adjustments to manipulate the prepopulated base Forecast
- View how Forecast Base, Transfers, and Adjustments cumulate to gain the full picture of your Forecast
- Review historical data, total Forecast and key variances scenarios

To begin the Non-compensation data input and review process:

1. Click the **Multi-Year Forecast** tile to open the cluster
2. Click on the **Non-Compensation** tile to open the forms

This process will open the Non-compensation input and review forms.

**Note:** The multi-year forms are very similar to current year forecast forms except for the additional columns for future year forecasts.
Division-Level Non-Compensation

**Division-Level** – Enter forecast amounts at ‘Divisional-Level’ using Divisions, in By Account, By Division, By Account and Division Forms and use Divisional-Level Review to see total results.
Division-Level By Account Form - Non-Compensation

Provides efficiency for forecasting to a single Division. The Point of View section can be changed to the Fund and Sub-Department member for your institution limited to your security profile.

Input data in Forecast Adjustment Year Total Columns and Comments if needed. All other cells should be grey.

1. Enter data in the Total Year column (by Total Year, Total Quarter or Total Month)
2. Enter comments in the Comment column, if needed
3. Once done, click Save to save the sheet
4. Click OK in pop up message
**Division-Level By Division Form- Non-Compensation**

Provides efficiency for users that are forecasting to multiple Divisions. The Point of View section can be changed to the Fund and Account member for your institution limited to your security profile.

Input data in Forecast Adjustment Year Total Columns and Comments if needed. All other cells should be grey.

1. Enter data in the Total Year column (by Total Year or Month)
2. Enter comments in the Comment column, if needed
3. Once done, click Save to save the sheet
4. Click OK in pop up message

**Note:** The form only displays Sub-Departments with activity. Use the action menu Open Forecast Accounts if needed.
Division-Level By Account & Division Form- Non-Compensation

Provides forecasting to Multiple Divisions and Accounts by Fund. The Point of View section can be changed to the Fund member for your institution limited to your security profile.

Input data in Forecast Adjustment Year Total Columns and Comments if needed. All other cells should be grey.

1. Enter data in the Total Year column (by Total Year or Month)
2. Enter comments in the Comment column, if needed
3. Once done, click Save to save the sheet
4. Click OK in pop up message

Note: The form only displays Account and Sub-Department combinations with activity. Use the action menu Open Forecast Accounts if needed.
## Division-Level Review – Non-Compensation

Provides a historical comparison of the summarized Forecast at the Program Total and Project Total level.

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Revenue</th>
<th>Total Revenue</th>
<th>Total Revenue</th>
<th>Total Revenue</th>
<th>Total Revenue</th>
<th>Total Revenue</th>
<th>Total Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>155,961,162</td>
<td>15,381,125</td>
<td>19,500,920</td>
<td>145,428,652</td>
<td>128,248,967</td>
<td>122,358,768</td>
<td>10,867,085</td>
</tr>
</tbody>
</table>

1. The Point of View section can be changed to the Sub-Department member for your institution limited to your security profile.

2. Review data in Forecast Adjustment **Year Total** Columns and compare to Actuals and Budget Trends. All cells should be grey.
Rinse and Repeat

The section above covered the Division-Level input for Non-Compensation, the same process is applicable for Division-Level Input in the Salary, Wages & Fringe and Revenue Cards.
Revenue - Input and Review

Rinse and Repeat

In Smart View!

This section will cover the Department-Level input for Revenue. The same process is applicable for the Campus-Level and Division-Level inputs in Revenue. It is an abridged version of what was covered in the CYF Training.
Use this card to Forecast for Revenue.

- Enter adjustments to manipulate the prepopulated base Forecast
- View how Forecast Base, Transfers, and Adjustments cumulate to gain the full picture of your Forecast
- Review historical data, total Forecast and key variances scenarios

To begin the Revenue data input and review process:

1. Click the Multi-Year Forecast tile to open the cluster
2. Click on the Revenue tile to open the forms

This process will open the Revenue input and review forms.
Sub-Department-Level Revenue

**Sub-Department-Level** – Enter forecast amounts at ‘Sub-Department-Level’ using Sub-Departments, in By Account, By Sub-Department, By Account and Sub-Department Forms and use Sub-Department-Level Review to see total results.
Sub-Departmental level By Account - Revenue Data Smart View

To open this form in Smart View:

1. Select the **Actions** menu
2. Select **Open in Smart View** (Use the scroll icon to scroll to the bottom of the list, if needed)
3. Navigate to open downloaded file Excel workbook, or open a blank workbook

Note: Depending on the browser being used the pop up will look different please refer to the Smart View training guide for more information.
Changing POV - Revenue Data Smart View

Smart View forms have all the same functionality as Web forms, the clicks are just different. To change the POV in Smart View forms:

1. Use the dropdowns to select the new member.

2. After all new members have been selected, users must click Refresh for those changes to apply.

Note: If you know the name of the member you are looking for you can type it into the dropdown, and Smart View will filter the list.
Sub-Department-Level By Account Form - Revenue Data Smart View

Provides efficiency for forecasting to a single Division. The Point of View section can be changed to the Fund and Sub-Department member for your institution limited to your security profile.

Input data in Forecast Adjustment **Year Total** Columns and **Comments**, these columns will be light yellow. Once data is entered, they will change to a dark yellow. All other cells should be grey.

1. Enter data in the **Total Year** column (by Total Year or Month)

2. Enter comments in the **Comment** column, if needed

3. Once done, click **Submit Data** to save the sheet

**Note:** There is no pop up to confirm that data has saved.
Navigating to New Forms in Smart View

Rather than going back to the web to open a new form in Smart View, users can navigate to the new form from the Smart View Panel.

To open a new form:

1. Select **Smart View** from the ribbon

2. In the Smart View ribbon select **Panel**, the panel will open at the far right side of the screen

3. Click the to expand the **URL, PLNUW{INST}, Library, Multi-Year Forecast, Revenue**

4. Select the form you would like to open, **double click on the form to open**

5. New form opens in worksheet.
Sub-Department-Level By Sub-Department Form- Revenue Data

Provides efficiency for forecasting to a single Sub-Department (Units, Divisions, Sub-Departments). The Point of View section can be changed to the Fund and Sub-Department member for your institution limited to your security profile.

Input data in Forecast Adjustment Year Total Columns and Comments, these columns will be light yellow. Once data is entered, they will change to a dark yellow. All other cells should be grey.

1. Enter data in the Total Year column (by Total Year, Total Quarter or Total Month)
2. Enter comments in the Comment column, if needed
3. Once done, click Submit Data to save the sheet
Open Forecast Accounts– Revenue Smart View

NOTE: This is Optional

- If there was no data for a Sub-Department or Account combination, the members will not display in the form.
- The Open Forecast Accounts action will let you add a Division or Account to enter Forecast against

When entering data at Total Year, the amounts will be spread evenly across the remaining open months.

After entering data in the Total Year column:

1. Right click on the cell where data was entered
2. Select Smart View from the right click menu
3. Select Open Forecast Accounts
4. Select Sub-Department and/or Account and/or Fund using the selector
5. Click OK.
Remove Forecast Accounts– Revenue Smart View

NOTE: This is Optional

- If a member with no Baseline Forecast for a Division or Account combination is unnecessary but is showing on the form

- The Remove Forecast Accounts action will let you remove a Division or Account from being displayed on the form

After entering data in the Total Year column:

1. Right click on the cell where data was entered
2. Select Smart View from the right click menu
3. Select Remove Forecast Accounts
4. Select Sub-Department and/or Fund using the selector
5. Click OK.
Rinse and Repeat

The section above covered the Department-Level input for Revenue, the same process is applicable for Department-Level Input in the Salary, Wages and Fringe and Non-Compensation Cards.
Transfers - Input and Review

To begin the Transfers process:

1. Click the Multi-Year Forecast tile to open the cluster.
2. Click on the Transfers tile to open the forms.

Note: All Transfers are inputted at the Sub-Department Level and are then included in the Campus-Level, Division-Level and Sub-Department-Level Forecasts.

This process will open the Transfer Forms.
Transfers – Budget vs Forecast

During the Requirements phase, institutions communicated that Transfers were a large indicator of their potential spend for the year. So, they would need to be included as part of the Forecast.

Budget Transfers vs Forecast Transfers

- **Budget Transfers:** Transfer data that has been entered in SFS that is loaded directly the PlanUW into the Budget scenario.

- **Forecast Transfers:** Transfer data that has been copied from the Budget scenario in PlanUW to the Forecast scenario in PlanUW to facilitate Forecast creation.

How do I include Forecast Transfers in my Forecast?

- Monitor Forecast Transfer forms monthly to ensure that transfers are not being missed from prior months.

- If **not monitoring monthly**, open the Transfer Review form first. Use this form to identify transfers from prior months that need to be included in the current Forecast months.

To accommodate all uses of the Transfers in Forecasting, Transfers in the Forecast are being "dropped in" the month they were entered in SFS. This means that if not spread or adjusted, Forecast Transfer data could be lost in the next month process.
By Account - Transfers

Provides forecasting of Multi-Year Transfers by Account in current and future years. Select Fund and Sub-Department in point of view. Add and adjust Transfers to the years they are expected to occur.

1. Enter data in the **Forecast years**
2. Enter comments in the **Comment** column, if needed
3. Once done, click **Save** to save the sheet
4. Click **OK** in pop up message
**By Sub-Department - Transfers**

Provides forecasting of Multi-Year Transfers by Sub-Department in current and future years. Select Fund and Sub-Department in point of view. Add and adjust Transfers to the years they are expected to occur.

1. Enter data in the **Forecast years**
2. Enter comments in the **Comment** column, if needed
3. Once done, click **Save** to save the sheet
4. Click **OK** in pop up message
By Account and Sub-Department - Transfers

Provides forecasting of Multi-Year Transfers by Account & Sub-Department in current and future years. Select Fund and Sub-Department in point of view. Add and adjust Transfers to the years they are expected to occur.

1. Enter data in the **Forecast years**

2. Enter comments in the **Comment** column, if needed

3. Once done, click **Save** to save the sheet

4. Click **OK** in pop up message
Multi-Year Forecast Reports

To view the Multi-Year Forecast reports:

1. Click the Multi-Year Forecast tile to open the cluster
2. Click on the MYF Reports tile to open
Multi-Year Forecast Review - Multi-Year Forecast Reports

Multi-Year Forecast Review Report

1. Select the Version member when prompted (Working, Campus, Divisional, Sub-Departmental)

2. Select a Department and Fund where you know there is data for your institution

3. Select File Format: PDF, HTML or Excel
Budget Forecast Report - Multi-Year Forecast Reports

1. Select the Version member when prompted (Working, Campus, Divisional, Sub-Departmental)

2. Select a Department where you know there is data for your institution

3. Select File Format: PDF, HTML or Excel
4-Year Fund Balance Report - Multi-Year Forecast Reports

1. Select the Version member when prompted (Working, Campus, Divisional, Sub-Departmental)

2. Select a Department where you know there is data for your institution

3. Select File Format: PDF, HTML or Excel

4-Year Fund Balance Report

<table>
<thead>
<tr>
<th>Department</th>
<th>4-Year Fund Balance Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>163034</td>
<td>Dining Plans (PKS)</td>
</tr>
</tbody>
</table>
## SMART VIEW HOME PAGE

The image shows a MATLAB GUI window titled "SMART VIEW HOME PAGE". The window contains a worksheet with a table and a graph. The worksheet contains columns labeled "Account", "Department", and "Period". The graph in the right pane displays data trends, which is typical for a business intelligence tool.
PLANNING TAB ICON DESCRIPTION

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

- **Panel**
  Access and manage shared and private connections, tasks, lists, and extensions.

- **Connections**
  Display active or recently used connections, reset the current connection to default, or access Reporting and Analysis documents.

- **Submit Data**
  Data should be entered at Level 0 and submitted once the spreadsheet is completed.

- **Options**
  Get a variety of options for working with Smart View, including Member, Data, Advanced, Formatting, Cell Style, and Extension Options.

- **Undo**
  Undoes the previous Ad Hoc operation.

- **Sheet Info**
  Displays general and connection info for worksheet.