



## **PlanUW Processes**

# **QUICK REFERENCE GUIDE**

## ***Multi-Year Forecast***

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## Revision History

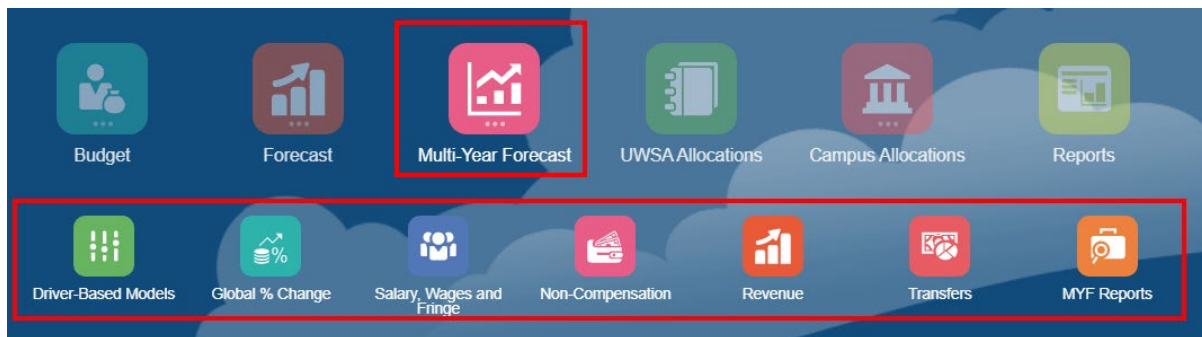
Version	Key Revisions	Modified By	Date
1.0	Initial Document Creation	Huron Consulting	11/16/2020
2.0	Drafted Multi-Year Forecast Content	Huron Consulting	12/11/2020

# Multi-Year Forecast

# PlanUW Multi-Year Forecast Tasks and Processes

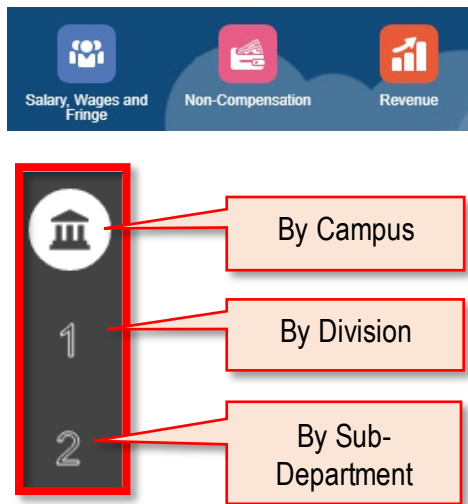
The **Multi-Year Forecast** tile is a new edition to the homepage and extends the existing Current Year Forecast process by four years. The Multi Year Forecast process mimics the Forecast process with forms being divided into the similar sections such as:

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



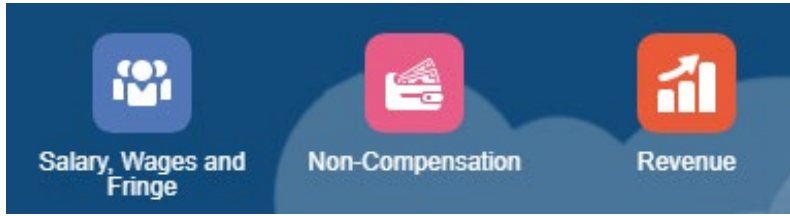
The two pieces of *NEW Optional Functionality* that come with the Multi-Year Forecast are:

- 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.

Unsuppressed

Suppressed

 1 2	By Account	By Division	By Account and Division	Campus-Level Review
	By Account	By Division	By Account and Division	Campus-Level Review
	By Account	By Department	By Account and Department	Campus-Level Review

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.

Column Title	Column Definitions for Input Tiles
YTD	Year to Date –Total Actuals from July to the month displayed in the YTD column.
CY YTD vs PY YTD	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.
Forecast Input	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.
Forecast Transfers	This column displays the budget transfers that have been respread by users in the Forecast Transfers card.
Campus/Divisional/Sub-Departmental Forecast Adjustment	This column is open for input. This is where users can add adjustments to the forecast on top of Forecast Input and Forecast Transfers.
View	These columns display posted Actuals or Budget data throughout the year.



# Driver-Based Models



### NEW Optional Functionality

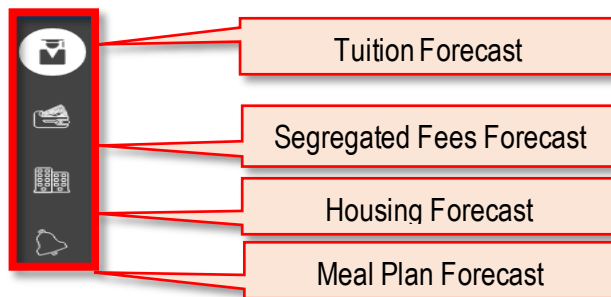
Use this card to enter drivers to Forecast for Tuition, Segregated Fees, Housing and Meal Plans for multiple years.

- 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

**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.

Dimension	User Variable	Member
Department	MYF Housing Dept	PLT_853647
Department	MYF Meal Plan Dept	LAC_049100
Department	MYF Tuition Dept	LAC_072427
Department	Total Institution	UWLAC
Department	User Institution	UWLAC
Department	User Institution Alloc	UWSA_ALLOC_UNITS
Department	User Institution UWSA Alloc	Tot_LAC_input

User Variable member selection can be updated in two ways:

- From User Preferences (see section Set User Variables)
- Directly on the form from POV

Scenario	Department	MYF Tuition Dept	Fund
Forecast	072427 - Early College Credit Prog (LAC)	MYF Tuition Dept 072427 - Early College Credit Prog (LAC)	131 - Academic Student Fees

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.

Tuition Revenue Modeling Tuition Model Review

**MYF - Tuition**

Scenario Forecast Department 072427 - Early College Credit Prog (LAC) MYF Tuition Cost 072427 - Early College Credit Prog (LAC) 189 - Extension Student Fees Fund

Actions Save Refresh

Data Ad hoc Format

Tuition Type Name	2020 - 2021		2020 - 2021	2021 - 2022		2022 - 2023		2023 - 2024		2024 - 2025		2021 - 2022	2022 - 2023	2023 - 2024
	Fall Headcount	Fall Billing FTE Factor	Fall Billing FTE	Retention %	New Enrollment %	Retention %	New Enrollment %	Retention %	New Enrollment %	Retention %	New Enrollment %	Fall Billing FTE	Fall Billing FTE	Fall Billing FTE
UG - Resident	UG VII Resident	3958	99%	3904	95%	3%	97%	4%	96%	2%	94%	7%	3728	3765
UG - Nonresident	UG Non-Resident	740	96%	711	95%	3%	97%	4%	96%	2%	94%	7%	697	704
UG - Online	UG Online	200	96%	192	95%	3%	97%	4%	100%	0%	100%	0%	188	190
UG - Other 1	UG JMN Resident	950	96%	913	95%	3%	97%	4%	96%	2%	94%	7%	895	904
UG - Other 2	UG MSEP	950	96%	912	95%	3%	97%	4%	100%	0%	100%	0%	894	903
UG - Other 3	UG Return to Wisconsin	100	96%	96	100%	1%	100%	1%	100%	1%	100%	1%	97	98
UG - Other 4	UG WIMN Commuter	150	95%	144	99%	2%	99%	2%	99%	2%	99%	2%	145	147
UG - Other 5	UG Hybrid	200	95%		99%	2%	99%	2%	99%	2%	99%	2%		
UG - Other 6														
UG - Other 7														

Information

Messages for this page are listed below.

- The data has been saved.
- Rule was run successfully

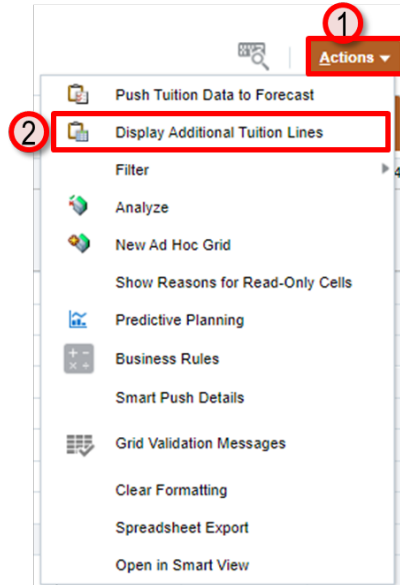
OK

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

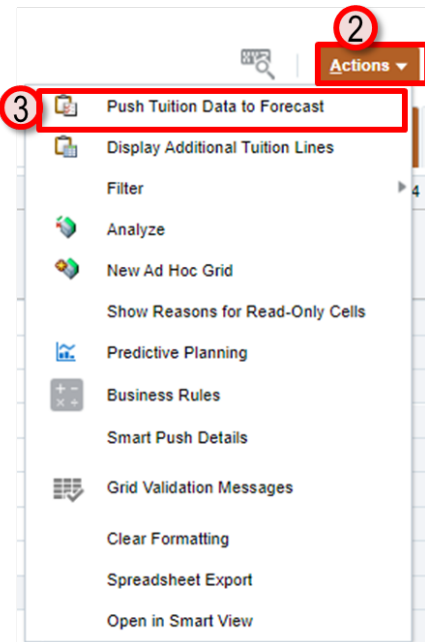


**Note:** This step can be completed from the Tuition Modeling Form or the Review Form via the Actions Menu and does not need to be completed twice.

2020 - 2021		2020 - 2021		2020 - 2021		2021 - 2022		2022 - 2023		2023 - 2024		2024 - 2025		2021 - 2022		2022 - 2023		2023 - 2024		2024 - 2025	
Tuition Type Name	Fall Headcount	Fall Billing FTE Factor	Fall Billing FTE	Retention %	New Enrollment %	Retention %	New Enrollment %	Retention %	New Enrollment %	Retention %	New Enrollment %	Retention %	New Enrollment %	Fall Billing FTE	Fall Billing FTE	Fall Billing FTE	Fall Billing FTE				
UG - Resident	UG VI Resident	3958	96%	3804	95%	3%	97%	4%	96%	2%	94%	7%	3728	3765	3690	3708					
UG - Nonresident	UG Non-Resident	740	96%	711	95%	3%	97%	4%	96%	2%	94%	7%	697	704	690	693					
UG - Online	UG Online	200	96%	192	95%	3%	97%	4%	100%	0%	100%	0%	188	190	190	190					
UG - Other 1	UG MN Resident	950	96%	913	95%	3%	97%	4%	96%	2%	94%	7%	895	904	886	890					
UG - Other 2	UG MSEP	950	96%	912	95%	3%	97%	4%	100%	0%	100%	0%	894	903	903	903					
UG - Other 3	UG Return to Wisconsin	100	96%	96	100%	1%	100%	1%	100%	1%	100%	1%	97	98	99	100					
UG - Other 4	UG WIMN Commuter	150	96%	144	99%	2%	99%	2%	99%	2%	99%	2%	145	147	148	150					
UG - Other 5	UG Hybrid	200	95%	190	99%	2%	99%	2%	99%	2%	99%	2%	192	194	196	198					


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:

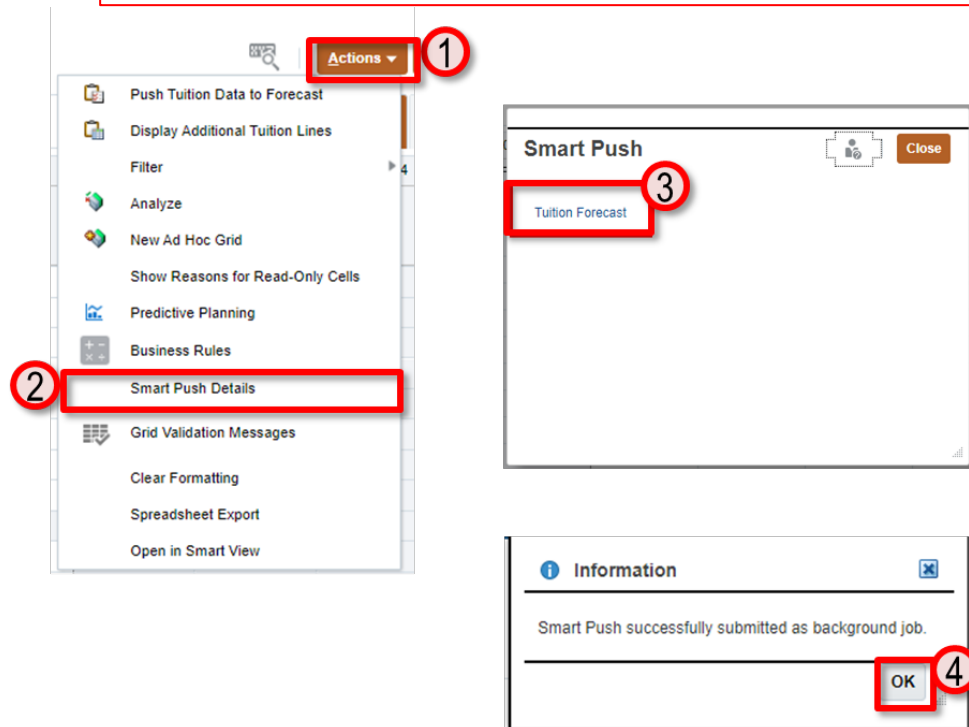
1. Select **Tuition Fund** from the prompt by clicking on .
2. When done, click **Launch**.
3. Confirm that MY\_Tuition\_Data Mapping was successful. Click **OK**.



## 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.

		2020 - 2021	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	-	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025
Tuition Type		Fall Headcount	Fall Billing FTE	Fall Billing FTE	Fall Billing FTE	Fall Billing FTE	Fall Billing FTE	Total Tuition Revenue	Total Tuition Revenue	Total Tuition Revenue	Total Tuition Revenue	Total Tuition Revenue	
UG - Resident	UG III Resident	3956	3034	3728	3785	3690	3708	33540100	31225333	31538091	31218402	31663103	
UG - Nonresident	UG Non-Resident	740	711	697	704	690	693	12229403	11499430	11729419	11494831	11552305	
UG - Online	UG Online	200	192	188	190	190	190	1183778	1113116	1124248	1124248	1124248	
UG - Other 1	UG MN Resident	950	913	895	904	886	890	8050302	7644728	7872570	8011954	8350133	
UG - Other 2	UG MSEP	950	912	894	903	903	903	10771085	10328716	10634567	11039693	11444819	
UG - Other 3	UG Return to Wisconsin	100	96	97	98	99	100	1306166	1253267	1265799	1304026	1342892	
UG - Other 4	UG WITHIN Premier	150	144	145	147	148	150	1269778	1230535	1267451	1317411	1380796	
UG - Other 5	UG Hybrid	200	190	192	194	196	198						
<b>Total UG Headcount</b>		<b>7248</b>	<b>6962</b>	<b>6835</b>	<b>6904</b>	<b>6801</b>	<b>6831</b>	<b>68350610</b>	<b>64295625</b>	<b>65432145</b>	<b>65508465</b>	<b>66878295</b>	
Grad - Resident		10	10	9	10	9	9	69749	65586	66888	66203	67180	
Grad - Nonresident		3	3	3	3	3	3	241768	227337	231884	228474	232861	
<b>Total Grad Headcount</b>		<b>13</b>	<b>12</b>	<b>12</b>	<b>12</b>	<b>12</b>	<b>12</b>	<b>311518</b>	<b>292923</b>	<b>298782</b>	<b>295677</b>	<b>300040</b>	
Other Student 1		45	43	42	43	42	42	622321	585175	596879	584941	587666	
<b>Total Other Student</b>		<b>45</b>	<b>43</b>	<b>42</b>	<b>43</b>	<b>42</b>	<b>42</b>	<b>622321</b>	<b>585175</b>	<b>596879</b>	<b>584941</b>	<b>587866</b>	
International		10	10	9	10	9	9	138294	131326	133940	132536	134479	
<b>Total Headcount</b>		<b>7316</b>	<b>7027</b>	<b>6899</b>	<b>6968</b>	<b>6864</b>	<b>6895</b>	<b>69422743</b>	<b>65305050</b>	<b>66481746</b>	<b>66521619</b>	<b>67900680</b>	

\*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 again or was not pushed before:

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

1 Actions

2 Push Tuition Data to Forecast

- Filter
- Analyze
- New Ad Hoc Grid
- Show Reasons for Read-Only Cells
- Predictive Planning
- Business Rules
- Smart Push Details
- Grid Validation Messages
- Clear Formatting
- Spreadsheet Export
- Open in Smart View



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.

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



**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

**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.

Name	Alias (Default)
Department	
> UWPLT	ALL_ORGS - ALL UWPLT ORGANIZATIONS (PLT)
> UWLAC	TOP - UW Lax Top (LAC)
> UWPKS	GENL_ADMINISTRATION - ALL CAMPUS LEVEL (PKS)
> UWWTW	ALL_DEPTS - All UWWTW Departments (WTW)
> Utility_Departments	
> No_Department	
> PA_Departments	Planning Allocation Departments
Seg Fee SubDepts	
UWLAC SegFee SubDepts	
> LAC_040300(Shared)	040300 - SUFAC (LAC)
> LAC_040305(Shared)	040305 - Org Actv Fee Clearing (LAC)
> LAC_040306(Shared)	040306 - Uwl Student Association (LAC)
> LAC_040309(Shared)	040309 - One Shot Holding (LAC)
> LAC_040310(Shared)	040310 - Art Exhibitions (LAC)
> LAC_040317(Shared)	040317 - Multicultural Events (LAC)
> LAC_040319(Shared)	040319 - Publications Racquet (LAC)
> LAC_040320(Shared)	040320 - Upass Program (LAC)
> LAC_040322(Shared)	040322 - Distinguished Lecture Series (LAC)
> LAC_040323(Shared)	040323 - WRAQ Student Radio Station (LAC)
> LAC_040326(Shared)	040326 - Environmental Sustainability (LAC)
> LAC_040330(Shared)	040330 - Graduate Activities Program (LAC)
> LAC_040332(Shared)	040332 - Organization Grants (LAC)
> LAC_040334(Shared)	040334 - Women's Studies Programs (LAC)
> LAC_040335(Shared)	040335 - Ability Awareness Prog (LAC)
> LAC_040336(Shared)	040336 - International Students Program (LAC)

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](mailto:planuw@uwsa.edu)

## Seg Fee Modeling Form - Driver-Based Models

	2021 - 2022		2022 - 2023		2023 - 2024		2024 - 2025		2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025
	Fall FTE/Headcount	Spring FTE/Headcount	Fall FTE/Headcount	Spring FTE/Headcount	Fall FTE/Headcount	Spring FTE/Headcount	Fall FTE/Headcount	Spring FTE/Headcount	Annual Seg Fee Rate	Annual Seg Fee Rate	Annual Seg Fee Rate	Annual Seg Fee Rate	Seg Fee % Collectible	Seg Fee Revenue	Total Seg Fee Revenue	Total Seg Fee Revenue	Total Seg Fee Revenue
040300 - SUFAC (LAC)	100	50	100	100	50	50	25	67	12	12	14	15	90.0%	891	1158	893	
040305 - Org Actv Fee Clearing (LAC)	100	100	100	100	100	100	100	100	5	6	7	8	86.00%	430	516	602	
040306 - Uni Student Association (LAC)	345	253	376	289	401	305	568	305	48	48	50	50	80.00%	11481.6	12768	14120	
040309 - One Shot Holding (LAC)	345	345	345	345	345	345	345	345	8	8	8	8	94.00%	2594.40	2594.40	2594.40	
040310 - Art Exhibitions (LAC)	100	100	100	100	100	100	100	100	5	6	7	8	86.00%	430	516	602	
040317 - Multicultural Events (LAC)	64	23	64	23	64	23	64	23	10	11	12	13	90.00%	391.5	430.65	469.8	
040319 - Publications Racquet (LAC)	33	22	22	22	22	22	22	22	22	22	22	22	22.00%	133.1	106.48	106.48	

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

	2021 - 2022		2022 - 2023		2023 - 2024		2024 - 2025		2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025
	Fall FTE/Headcount	Spring FTE/Headcount	Fall FTE/Headcount	Spring FTE/Headcount	Fall FTE/Headcount	Spring FTE/Headcount	Fall FTE/Headcount	Spring FTE/Headcount	Seg Fee Rate	Seg Fee Rate	Seg Fee Rate	Seg Fee Rate	Seg Fee % Collectible	Total Seg Fee Revenue	Total Seg Fee Revenue	Total Seg Fee Revenue	Total Seg Fee Revenue
040300 - SUFAC (LAC)	100	50	100	100	50	50	25	67	12	12	14	15	90%	1782	2376	1386	1386
040305 - Org Actv Fee Clearing (LAC)	100	100	100	100	100	100	100	100	5	6	7	8	86%	860	1032	1204	1376
040306 - Uni Student Association (LAC)	345	253	376	289	401	305	568	305	48	48	50	50	80%	22983	25536	28240	34020
040309 - One Shot Holding (LAC)	345	345	345	345	345	345	345	345	8	8	8	8	94%	5189	5189	5189	5189
040310 - Art Exhibitions (LAC)	100	100	100	100	100	100	100	100	5	6	7	8	86%	430	516	602	698

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

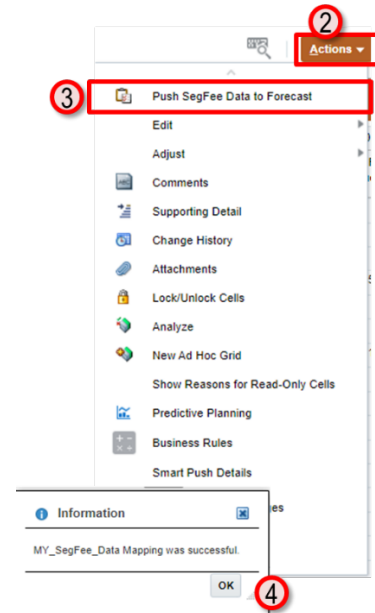


**NOTE:** This step can be completed from the Seg Fee Modeling Form or the Review Form via the Actions Menu and does not need to be completed twice.

	2021 - 2022		2022 - 2023		2023 - 2024		2024 - 2025		2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025
	Fall FTE/Headcount	Spring FTE/Headcount	Fall FTE/Headcount	Spring FTE/Headcount	Fall FTE/Headcount	Spring FTE/Headcount	Fall FTE/Headcount	Spring FTE/Headcount	Annual Seg Fee Rate	Annual Seg Fee Rate	Annual Seg Fee Rate	Annual Seg Fee Rate	Seg Fee % Collected	Total Seg Fee Revenue	Total Seg Fee Revenue	Total Seg Fee Revenue	Total Seg Fee Revenue
040300 - SUFAC (LAC)	100	50	100	100	50	50	25	67	12	12	14	15	99.00%	591	1555	693	
040305 - Org Actv Fee Cleaning (LAC)	100	100	100	100	100	100	100	100	5	6	7	8	86.00%	430	516	602	
040306 - Unit Student Association (LAC)	345	253	376	289	401	305	568	305	48	48	50	50	80.00%	11481.6	12760	14120	
040309 - One Shot Holding (LAC)	345	345	345	345	345	345	345	345	8	8	8	8	94.00%	2594.40	2594.40	2594.40	
040310 - Art Exhibitions (LAC)	100	100	100	100	100	100	100	100	5	6	7	8	86.00%	430	516	602	
040317 - Multicultural Events (LAC)	84	23	84	23	84	23	84	23	18	11	12	13	90.00%	391.5	430.65	409.8	
040319 - Publications Receipt (LAC)	33	22	22	22	22	22	22	22	22	22	22	22	22.00%	133.1	106.48	106.48	
040320 - Upass Program (LAC)																	
040322 - Distinguished Lecture Series (LAC)																	
040323 - WIRAD Student Radio Station (LAC)																	
040326 - Environmental Sustainability (LAC)																	
040330 - Graduate Activities Program (LAC)																	
040332 - Organization Grants (LAC)																	
040334 - Women's Studies Programs (LAC)																	
040335 - Ability Awareness Prog (LAC)																	

After saving Seg Fee data:

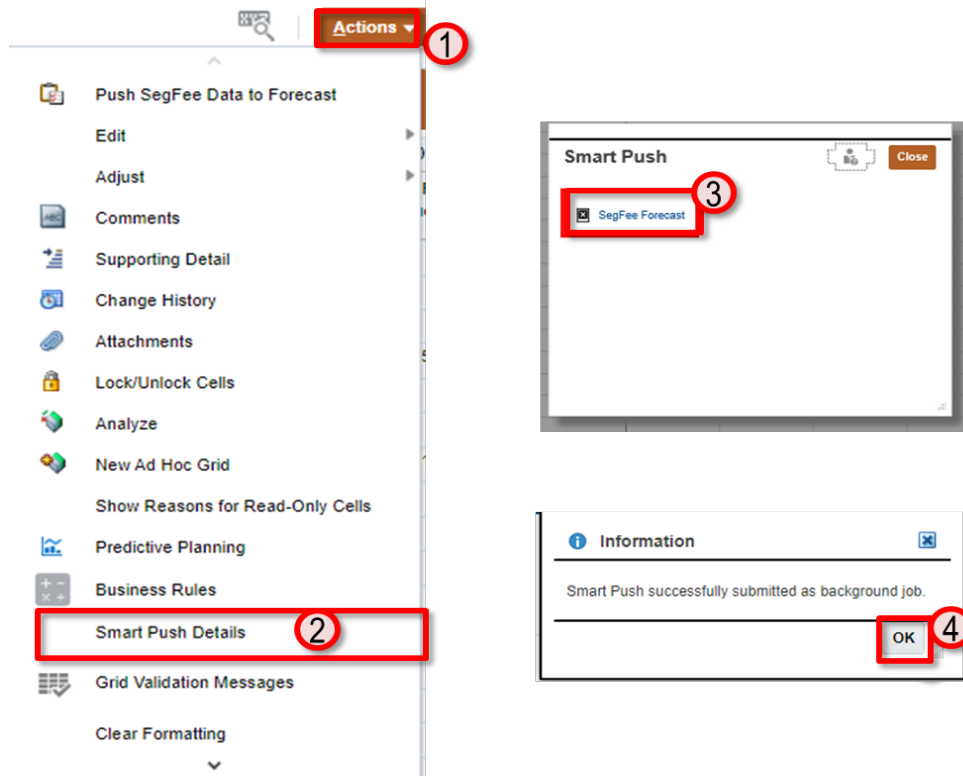
1. Cells will appear white when data is saved. Review calculated data in the grey columns.
2. If data is ready to be pushed to Forecast, click on the **Action** menu
3. Select **Push Seg Fee Data to Forecast**
4. Confirm that MY\_SegFee\_Data Mapping was successful. Click **OK**.



## 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



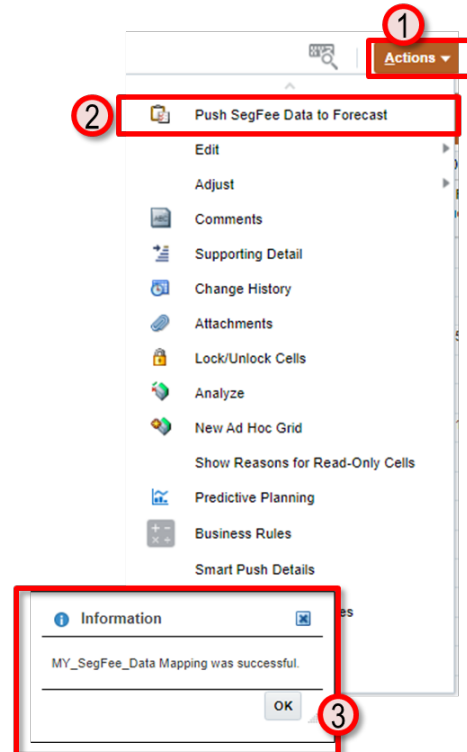
**NOTE:** Push SegFee Data to Forecast can be completed from the Seg Fee Modeling Form or the Review Form via the Actions Menu and does not need to be completed twice.

The screenshot shows the 'Seg Fee Model Review' interface. At the top, there is a navigation bar with 'Seg Fee Modeling' and 'Seg Fee Model Review'. Below this is the title 'MYF - Segregated Fees Review'. A table displays revenue data for various categories across four fiscal years: 2021-2022, 2022-2023, 2023-2024, and 2024-2025. The categories include SUFAC (LAC), Org Actv Fee Clearing (LAC), Uwl Student Association (LAC), One Shot Holding (LAC), Art Exhibitions (LAC), and UWLAC SegFee SubDepts. A large red 'Suppressed' watermark is overlaid on the right side of the table.

	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025
	Total Seg Fee Revenue	Total Seg Fee Revenue	Total Seg Fee Revenue	Total Seg Fee Revenue
040300 - SUFAC (LAC)	1782	2376	1388	1366
040305 - Org Actv Fee Clearing (LAC)	880	1032	1204	1376
040306 - Uwl Student Association (LAC)	22963	25536	28240	34620
040309 - One Shot Holding (LAC)	5189	5189	5189	5189
040310 - Art Exhibitions (LAC)	880	1032	1204	1376
UWLAC SegFee SubDepts	31654	35165	37223	44227

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**.

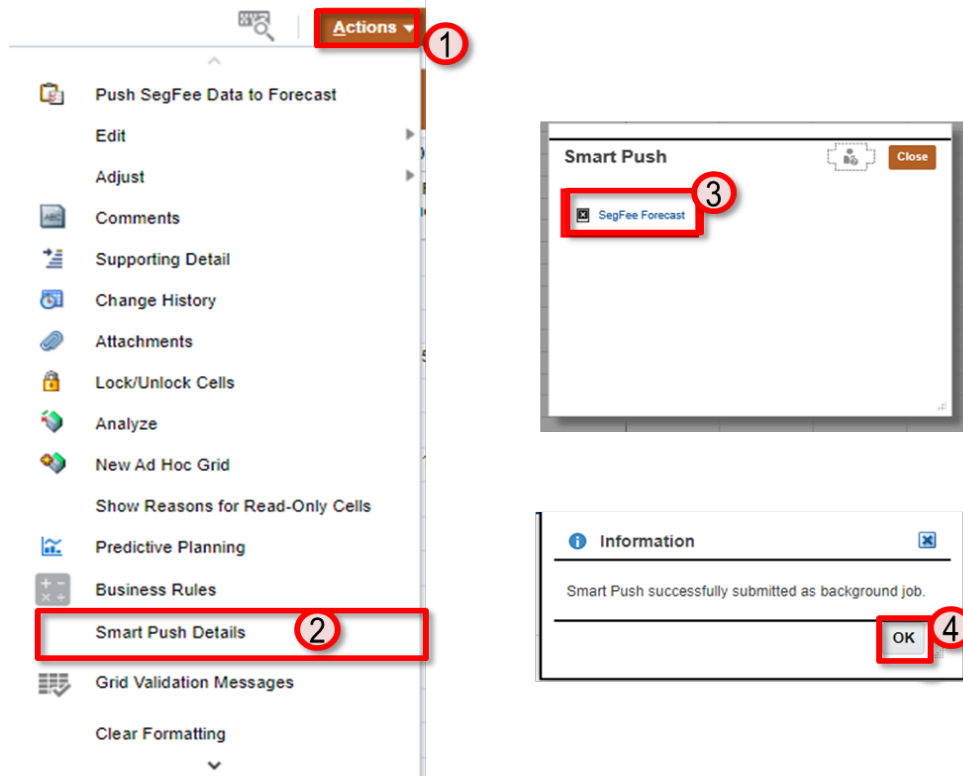




## Push Seg Fee Data to Reports – Driver Based Models



**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.

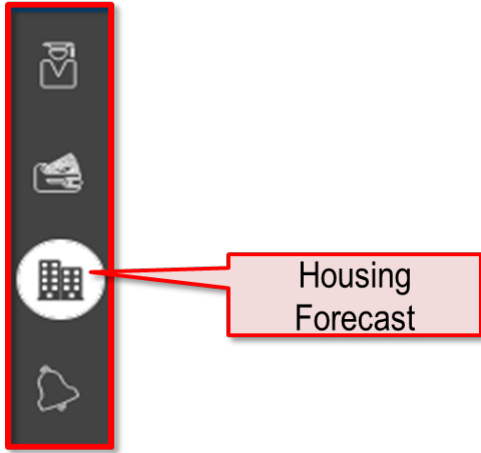
Dimension	SegFee Model	Multi-Year Forecast
Account	Total Seg Fee Revenue	Segregated Fees Forecast
Department	SegFee Sub-Departments on Form	SegFee Sub-Departments
Version	*Preselected and hidden on the form	Input
Fund	*Preselected and hidden on the form	Fund 128



**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

Preferences Save

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

Dimension	User Variable	Member
Department	MYF Housing Dept	PLT_823647
Department	MYF Meal Plan Dept	LAC_049100
Department	MYF Tuition Dept	LAC_072427
Department	Total Institution	UWLAC
Department	User Institution	UWLAC
Department	User Institution Alloc	UWSA_ALLOC_UNITS
Department	User Institution UWSA Alloc	Tot_LAC_input

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 **Housing Review**

**MYF - Housing Revenue** ⓘ

Scenario	Department	MYF Housing Dept
Forecast	047000 - Residence Life Management (LAC)	047000 - Residence Life Management (LAC)

## Housing Revenue Modeling Form - Driver-Based Models

The screenshot shows the 'MYF - Housing' interface. At the top, a dropdown menu is set to 'MYF Housing Dept' (circled with a red '1'). Below this is a large grid for data entry. The grid has columns for years from 2020-2021 to 2024-2025, and rows for Room Type 1 through Room Type 17. The first column is for 'Room Type Name'. The next four columns are for 'Current Annual Housing Rate', 'Room Rate % Change', 'Room Rate % Change', and 'Room Rate % Change'. The next four columns are for 'Annual Housing Rate', 'Annual Housing Rate', 'Annual Housing Rate', and 'Annual Housing Rate'. The next four columns are for 'Fall Housing Occupancy', 'Spring Housing Occupancy', 'Fall Housing Occupancy', and 'Spring Housing Occupancy'. The final two columns are for 'Housing Fee % Collectible' and 'Total Housing Revenue'. A large red box (circled with a red '2') encompasses the main data entry area.

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.

This screenshot shows the same interface as above, but with a red circle (circled with a red '3') around the scroll bar on the right side of the data grid. A red arrow points from the scroll bar towards the right edge of the grid, indicating that users can scroll to enter data in more columns.

The screenshot displays the 'Housing Revenue Modeling' interface for 'MYF - Housing'. The table lists various room types and their associated rates and occupancy percentages across multiple years. A red box highlights the input fields for 'Room Type 11', with callouts 1 and 2. A 'Save' button is circled with callout 3, and an 'OK' button in a pop-up message is circled with callout 4. The text 'Un-suppressed' is visible in the table area.

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.

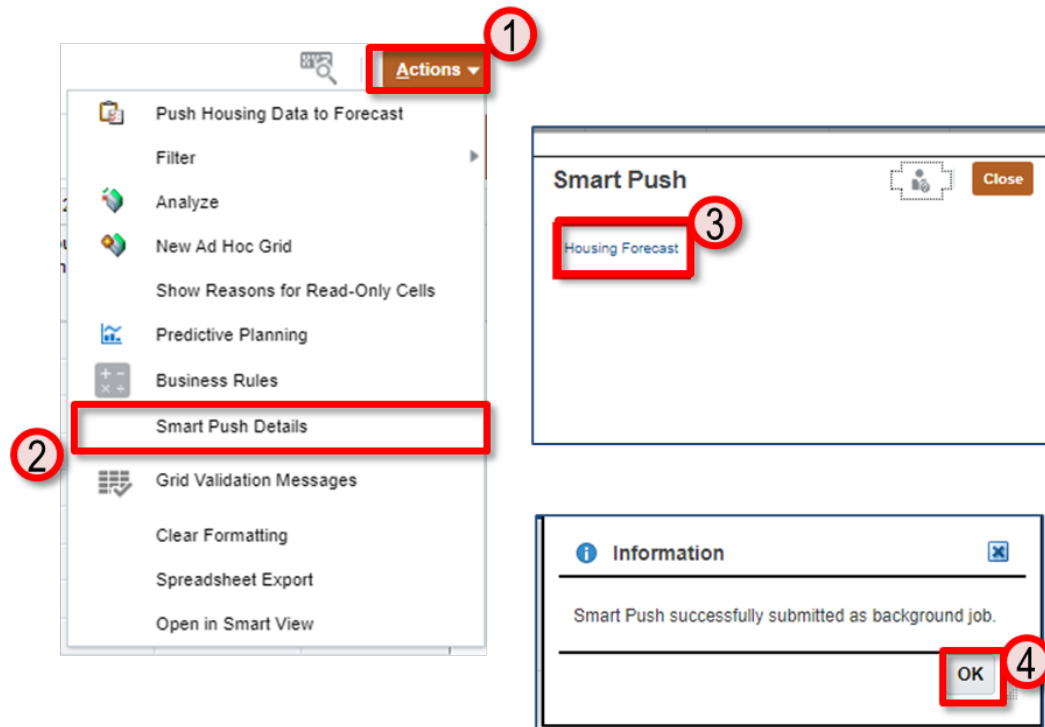
After saving housing data:

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.

The screenshot shows the 'MYF - Housing Revenue' form. At the top, there are tabs for 'Housing Revenue Modeling' and 'Housing Review'. Below the tabs, there are fields for 'Scenario Forecast', 'Department 047000 - Residence Life Management (LAC)', and 'MYF Housing Dept 047000 - Residence Life Management (LAC)'. A table displays revenue data for different room types across four periods: 2020-2021, 2021-2022, 2022-2023, 2023-2024, and 2024-2025. The table has columns for 'Room Type Name', 'Total Housing Revenue', and 'Total Housing Revenue' for each period. The 'Room Type 1 \*Test' row is highlighted with a red box and a circled '1'. To the right of the table, there is an 'Actions' menu with a dropdown arrow, circled with a '2'. The dropdown menu is open, showing options like 'Push Housing Data to Forecast', 'Analyze', 'New Ad Hoc Grid', etc. The 'Push Housing Data to Forecast' option is circled with a '3'. At the bottom right of the screenshot, there is a red box with a circled '4'.

Room Type Name	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025
Room Type 1 *Test	89964	91763	93599	95471	
Room Type 2 Test 2	526025	552326	579942	608939	
Room Total	615989	644089	673541	704410	

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.

The screenshot shows an 'Information' dialog box with a blue header and a close button. The message inside reads 'MY\_Housing\_Data Mapping was successful.' Below the message is an 'OK' button. The dialog box is circled with a red border and a circled '4' in the bottom right corner.

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.

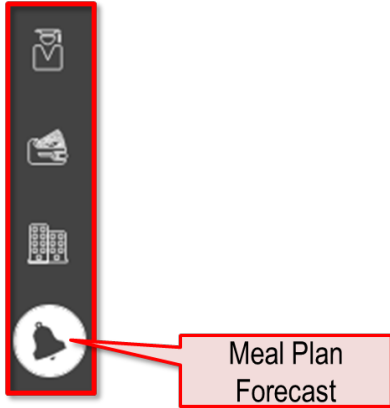
Dimension	Housing Model	Multi-Year Forecast
Account	Total Housing Revenue – Room Total	Housing Forecast
Department	MYF Housing Department	MYF Housing Department
Version	*Preselected and hidden on the form	Input



**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.

Preferences Save

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

Dimension	User Variable	Member
Department	MYF Housing Dept	PIT_833647
Department	<b>MYF Meal Plan Dept</b>	<b>LAC_049100</b>
Department	MYF Tuition Dept	LAC_072427
Department	Total Institution	UWLAC
Department	User Institution	UWLAC
Department	User Institution Alloc	UWSA_ALLOC_UNITS
Department	User Institution UWSA Alloc	Tot_LAC_input

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 Meal Plan Review

## MYF - Meal Plan ?

Scenario Forecast	Department 049100 - WC Food Service Operations (LAC)	<b>MYF Meal Plan Dept 049100 - WC Food Service Operations (LAC)</b>
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	2020 - 2021	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024
Meal Plan Name		Current Meal Plan Rate	Meal Plan Rate % Change	Meal Plan Rate % Change	Meal Plan Rate % Change

## Meal Plan Revenue Modeling Form - Driver-Based Models

Meal Plan Name	Current Annual Plan Rate	Meal Plan Rate % Change	Meal Plan Rate % Change	Meal Plan Rate % Change	Meal Plan Rate % Change	2020 - 2021		2021 - 2022		2022 - 2023		2023 - 2024		2024 - 2025		2025 - 2026		Meal Plan Fee % Collectible	Total Food Service Revenue
						Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate				
Meal Plan 1	2052	1%	1%	2%	2%	2054	2060	2114	2171	100	100	100	100	100	100	100	100	85%	232743
Meal Plan 2	2052	1%	1%	2%	2%	2062	2071	2072	210	123	123	123	123	123	123	123	123	85%	124118
Meal Plan 3	3188	1%	1%	2%	2%	3190	3221	3286	345	345	345	345	345	345	345	345	345	85%	211279
Meal Plan 4	2580	0%	1%	2%	2%	2580	2571	2523	478	478	478	478	478	478	478	478	478	85%	233857
Meal Plan 5	180	2%	2%	0%	1%	184	187	187	82	82	82	82	82	82	82	82	82	85%	21221
Meal Plan 6	874	2%	2%	0%	1%	881	900	900	114	114	114	114	114	114	114	114	114	85%	181217
Meal Plan 7	874	2%	2%	0%	1%	881	900	900	82	82	82	82	82	82	82	82	82	85%	187471
Meal Plan 8	874	2%	2%	2%	1%	900	918	927	82	82	82	82	82	82	82	82	82	85%	820219
Meal Plan 9	874	2%	2%	2%	1%	900	907	910	233	233	233	233	233	233	233	233	233	85%	182294
Meal Plan 10																			
Meal Plan 11																			
Meal Plan 12																			
Meal Plan 13																			
Meal Plan 14																			
Meal Plan 15																			
Meal Plan 16																			
Meal Plan 17																			
Meal Plan 18																			
Meal Plan 19																			
Meal Plan 20																			
Meal Plan Total	14358					14358	14358	14358	14358	2240	2240	2240	2240	2240	2240	2240	2240	2240	721843

Un-suppressed

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.

Meal Plan Review Modeling - Meal Plan Review

MYF - Meal Plan

Scenario Forecast: Department: MYF Meal Plan Dept (049100 - WC Food Service Operators (LAC), 049100 - WC Food Service Operators (LAC))

Meal Plan Name	2020 - 2021		2021 - 2022		2022 - 2023		2023 - 2024		2024 - 2025		2021 - 2022		2022 - 2023		2023 - 2024		2024 - 2025		2020 - 2021		2021 - 2022	
	Current Meal Plan Rate	Meal Plan Rate % Change	Meal Plan Rate % Change	Meal Plan Rate % Change	Meal Plan Rate % Change	Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate	Fall Meal Plan Enrollment	Spring Meal Plan Enrollment	Fall Meal Plan Enrollment	Spring Meal Plan Enrollment	Fall Meal Plan Enrollment	Spring Meal Plan Enrollment	Fall Meal Plan Enrollment	Spring Meal Plan Enrollment	Meal Plan Fee % Collectible	Total Food Service Revenue	Total Food Service Revenue		
Meal Plan 1 Eagle	2603	1%	1%	1%	2%	2634	2660	2714	2758	100	100	100	100	100	100	100	100	90%	508743	508743		
Meal Plan 2 Big Eagle	2662	1%	1%	2%	2%	2692	2711	2772	2792	123	123	123	123	123	123	123	123	90%	104116	104116		
Meal Plan 3 Mega Eagle	3158	1%	1%	2%	2%	3190	3221	3266	3302	345	345	345	345	345	345	345	345	90%	211273	211273		
Meal Plan 4 Eagle	2546	0%	1%	2%	2%	2546	2571	2623	2702	478	478	478	478	478	478	478	478	90%	2326617	2326617		
Meal Plan 5 10 Brooks	180	2%	2%	0%	1%	184	187	187	188	88	88	88	88	88	88	88	88	90%	31021	31021		
Meal Plan 6 Ruler Book Plan	874	2%	2%	0%	1%	891	909	909	918	114	114	114	114	114	114	114	114	90%	185127	185127		
Meal Plan 7 Ruler Plus Plan	874	2%	2%	0%	1%	891	909	909	918	92	92	92	92	92	92	92	92	90%	187471	187471		
Meal Plan 8 On Campus Table 50 Book	874	2%	2%	1%	1%	900	918	927	927	887	887	887	887	887	887	887	887	90%	300018	300018		
Meal Plan 9 On Campus Table 20 Book	332	2%	2%	1%	1%	301	307	310	310	333	333	333	333	333	333	333	333	90%	142204	142204		
Meal Plan 10	302	2%	2%	1%	0%					333	333	333	333	333	333	333	333	90%				
Meal Plan 11																						
Meal Plan 12																						
Meal Plan 13																						
Meal Plan 14																						
Meal Plan 15																						
Meal Plan 16																						
Meal Plan 17																						
Meal Plan 18																						
Meal Plan 19																						
Meal Plan 20																						
Meal Plan Total	14268					14268	14268	14268	14268	2249	2249	2249	2249	2249	2249	2249	2249		7218183	7218183		

Un-suppressed

**Information**

---

Messages for this page are listed below.

- i The data has been saved.
- i Rule was run successfully

OK

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.

Meal Plan	2021 - 2022				2022 - 2023				2023 - 2024				2024 - 2025				2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025
	Meal Plan Rate % Change	Meal Plan Rate % Change	Meal Plan Rate % Change	Meal Plan Rate % Change	Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate	Annual Meal Plan Rate	Total Food Service Revenue	Total Food Service Revenue				
Meal Plan 1	1%	1%	2%	2%	2534	2682	2714	2788	100	100	100	100	100	100	90%	805743	810851	825917	831427	
Meal Plan 2	1%	1%	2%	2%	2662	3011	3072	3133	123	123	123	123	123	123	90%	704116	711817	720360	730668	
Meal Plan 3	1%	1%	2%	2%	3160	3221	3288	3352	345	345	345	345	345	345	90%	2112778	2133808	2178884	2202119	
Meal Plan 4	0%	1%	2%	2%	2848	2871	2823	2702	478	478	478	478	478	478	90%	2338817	2358863	2407183	2479268	
Meal Plan 5	2%	2%	0%	1%	164	167	167	169	88	88	88	88	88	88	90%	310251	316411	318411	319488	
Meal Plan 6	2%	2%	0%	1%	883	858	858	833	114	114	114	114	114	114	90%	185127	188020	189200	201020	
Meal Plan 7	2%	2%	0%	1%	861	809	808	818	82	82	82	82	82	82	90%	187471	188020	188020	188227	
Meal Plan 8	3%	2%	1%	0%	900	818	827	821	887	887	887	887	887	887	90%	880018	888818	1008812	1008812	
Meal Plan 9	2%	2%	1%	0%	301	307	310	310	333	333	333	333	333	333	90%	1882284	188140	188101	188101	
Meal Plan 10	2%	2%	1%	0%	301	307	310	310	333	333	333	333	333	333	90%	1882284	188140	188101	188101	
Meal Plan 11																				
Meal Plan 12																				
Meal Plan 13																				
Meal Plan 14																				
Meal Plan 15																				
Meal Plan 16																				
Meal Plan 17																				
Meal Plan 18																				
Meal Plan 19																				
Meal Plan 20																				
Meal Plan Total					14858	14858	14858	14858	2873	2873	2873	2873	2873	2873	90%	7487478	7489003	7627269	7771887	

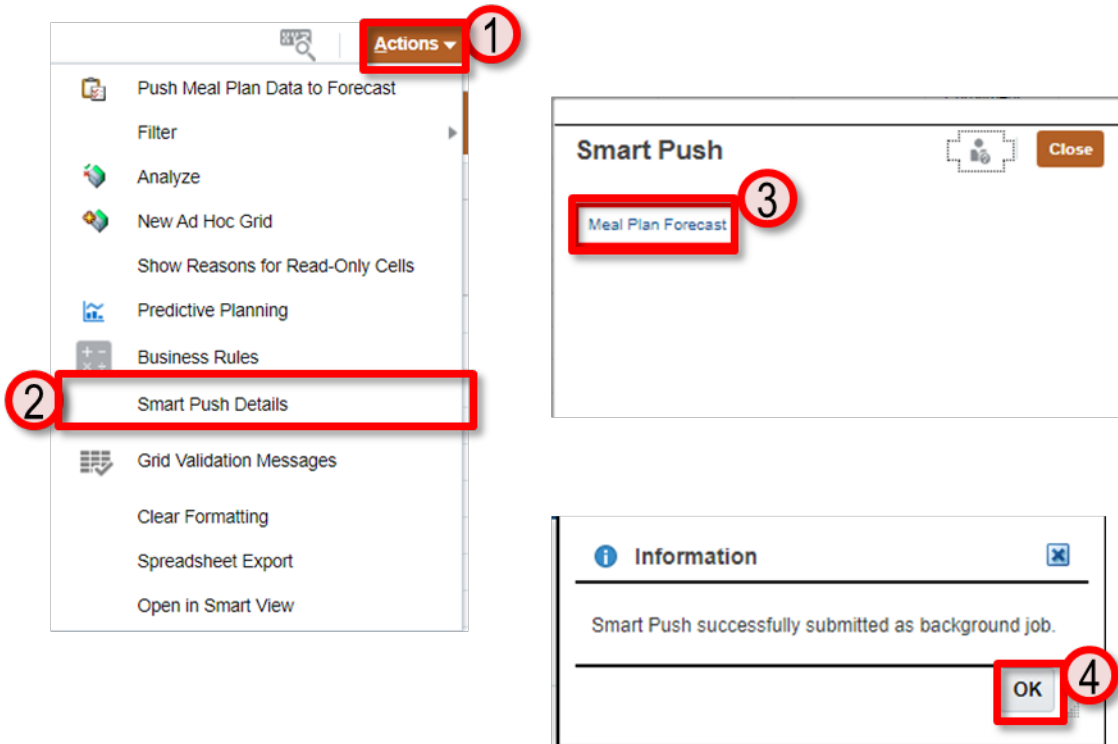
After saving Meal Plan data:

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 all cells will be read-only.

The screenshot displays the 'Meal Plan Review' interface. At the top, there are tabs for 'Meal Plan Revenue Modeling' and 'Meal Plan Review'. Below this, the 'MYF - Meal Plan Revenue' section shows a table with columns for 'Meal Plan Name' and 'Total Food Service Revenue' for the years 2020-2021, 2021-2022, 2022-2023, 2023-2024, and 2024-2025. A red box highlights the revenue data for 'Meal Plan 1' through 'Meal Plan 10'. To the right, an 'Actions' menu is open, showing options like 'Push Meal Plan Data to Forecast', 'Filter', 'Analyze', 'New Ad Hoc Grid', 'Show Reasons for Read-Only Cells', 'Predictive Planning', 'Business Rules', 'Smart Push Details', 'Grid Validation Messages', 'Clear Formatting', 'Spreadsheet Export', and 'Open in Smart View'. A red box highlights the 'Push Meal Plan Data to Forecast' option. Below the table, an 'Information' dialog box is shown with the message 'MY\_MealPlan\_Data Mapping was successful.' and an 'OK' button. Red circles with numbers 1, 2, 3, and 4 are placed over the revenue data, the 'Push Meal Plan Data to Forecast' option, the 'Actions' menu, and the 'OK' button, respectively.

Meal Plan Name	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025
Meal Plan 1	7446	9781	13836	20754	
Meal Plan 2	14169	14542	15227	15380	
Meal Plan 3	4999	5212	5539	5594	
Meal Plan 4	6832	7095	7511	7586	
Meal Plan 5	11647	12020	12646	12772	
Meal Plan 6	18707	19227	20147	20349	
Meal Plan 7	4015	4273	4629	4676	
Meal Plan 8	12695	13148	13881	14019	
Meal Plan 9	23054	23727	24896	25145	
Meal Plan 10	36701	37659	39398	39792	

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.

Dimension	Meal Plan Model	Multi-Year Forecast
Account	Total Meal Plan Revenue - Meal Plan Total	Total Food Service Revenue
Department	MYF Meal Plan Department	MYF Meal Plan Department
Version	*Preselected and hidden on the form	Input
Fund	*Preselected and hidden on the form	Fund 128



**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

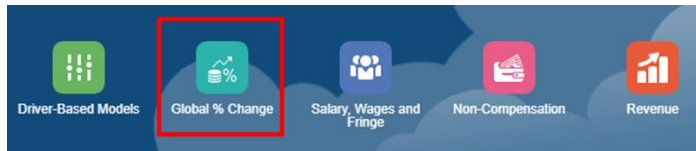


To begin the Global % Change data input process:

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

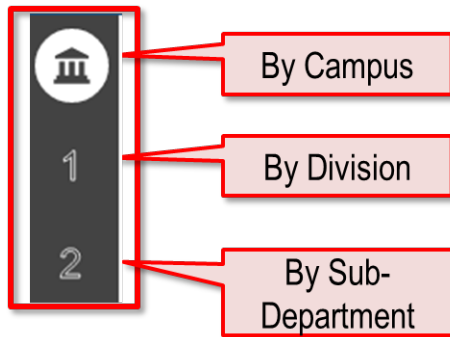
This process will open the Global % Change – CampusFCST input form.

### 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.

MYF - Global % Change - CampusFCST											
1	Scenario Forecast	Fund 128 - Auxiliary Enterprises	Department 04 - Student Affairs (LAC)								
2		Campus Forecast	Campus Forecast Adjustment				Campus Forecast Adjustment		-		
		2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	2020 - 2021		-	2021 - 2022	
		Total Year	Global % Change	Global % Change	Global % Change	Global % Change	Multi-Year Comments		-	Total Year	
	9230 - Federal Aid	3583									
	Segregated Fees Forecast	16277318									
	Misc. Revenue Forecast	2118457									
	Transfers (Revenue) Forecast	-4981390									
	Housing Forecast	32298031					additional			1500	
	Food Service Forecast	8320858									
	Gifts/Donations/Grants Forecast	215278									
	Fringe PlanUW	3004098					Test			2	
	Fringe FCST	3004098					Test			2	
	Academic Staff Salary PlanUW	3728531					Test			1	
	Faculty Salary PlanUW	500									
	Graduate - PA Salary PlanUW	78417									
	Grad-Resrch Asst Salary PlanUW	31581									
	LTE Salary PlanUW	9947									
	Postgrad Trainee Salary PlanUW	3602									
	Student Salary PlanUW	1070534									
	University Staff Salary PlanUW	1891159									
	Salary FCST	6814251					Test			1	
	Supplies and Expense Forecast	18510646					Test				
	Capital Expense Forecast	18270					Test 2				
	Aid to Individuals & Organizations Forecast	109110									
	Special Purpose Forecast	2902981									
	Sales Credits Forecast	-37001									

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.

MYF - Global % Change - CampusFCST												
Scenario Forecast	Fund 102 - GPO - Non-Doctoral Cluster	Department 01 - Executive (LAC)	Campus Forecast Adjustment					Campus Forecast Adjustment				
			2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025
Total Year	Global % Change	Global % Change	Global % Change	Global % Change	Global % Change	Multi-Year Comments	Total Year	Total Year	Total Year	Total Year	Total Year	
Fringe PlanUW	33,328	2%	3%	4%	5%		33,995	35,014	36,415	38,236		
<b>Fringe FCST</b>	<b>33,328</b>	<b>2%</b>	<b>3%</b>	<b>4%</b>	<b>5%</b>		<b>33,995</b>	<b>35,014</b>	<b>36,415</b>	<b>38,236</b>		
Academic Staff Salary PlanUW	395,173						395,173	395,173	395,173	395,173		
Faculty Salary PlanUW	6,840						6,840	6,840	6,840	6,840		
Graduate - PA Salary PlanUW	1,000	2%	2%	2%	2%		1,020	1,040	1,061	1,082		
Salary - Other PlanUW	-2,000						-2,000	-2,000	-2,000	-2,000		
Student Salary PlanUW	3,000	1%	1%	1%	1%		3,030	3,060	3,091	3,122		
<b>Salary FCST</b>	<b>404,013</b>						<b>404,063</b>	<b>404,114</b>	<b>404,165</b>	<b>404,217</b>		
Supplies and Expense Forecast	314,542					Test - 0% Input	314,542	314,542	314,542	314,542		
Debt Service Forecast	99,999					Test - No Input	99,999	99,999	99,999	99,999		

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.

**Information**

Messages for this page are listed below.

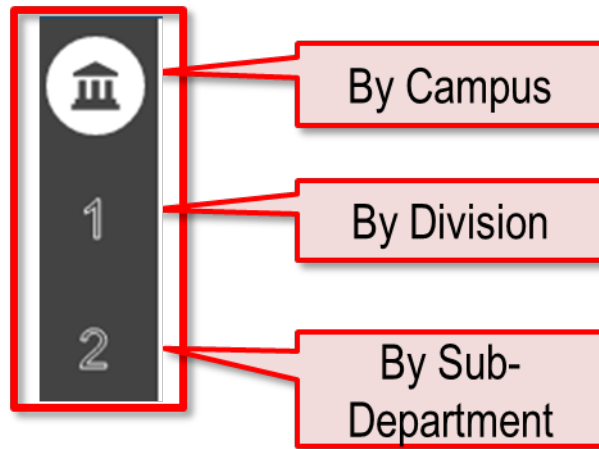
- The data has been saved.
- Rule was run successfully
- Smart Push successfully submitted as background job.

**OK**



**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.

# Salary, Wages & Fringe - Input and Review

## Rinse and Repeat



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:

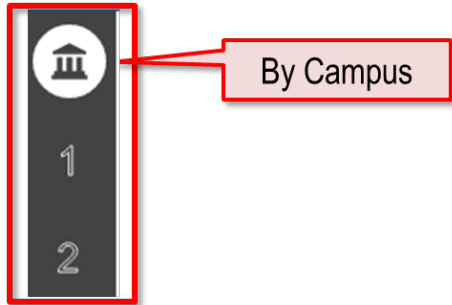
1. Click the **Multi-Year Forecast** tile to open the cluster
2. Click on the **Salary, Wages and Fringe** tile to open the forms

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

Program	Project	Department	Fund	Actual		Forecast					Forecast					Forecast						
				View	Year	View	Input	Campus Forecast Adjustment					Campus Forecast Adjustment					Campus Forecast				
2018 - 2019	2019 - 2020	2020 - 2021	2020 - 2021	2020 - 2021	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	2025 - 2021	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025		
Total Year	Total Year	Total Year	Aug YTD	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Multi-Year Comments	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year		
Fringe PlanUW	253585	283722	303758	50082	200400	9099															304208	
Academic Staff Salary PlanUW	325915	348370	381034	419424	371059																213331	
Faculty Salary PlanUW	1600	775	381034	500	500																500	
Graduate - RA Salary PlanUW	88948	101371	78891	8028	78417																78417	
Grad-Resch Asst Salary PlanUW			37875		31581																	31581
Grad-Tech Asst Salary PlanUW																						
LTE Salary PlanUW	3183	5035	12000	182	8947																	8947
Postgrad Trainee Salary PlanUW	61055	27684		3802	3502																	3802
Salary - Other PlanUW																						
Student Salary PlanUW	1121021	942345	1182173	15888	1070534																	1070534
University Staff Salary PlanUW	1785178	1887105	1900107	258884	1891158																	1891158

Un-suppressed

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.

Forecast		Campus Forecast Adjustment		Forecast		Forecast		Forecast		Forecast		Forecast		Forecast														
2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	2025 - 2026	2026 - 2027	2027 - 2028	2028 - 2029	2029 - 2030	2030 - 2031	2031 - 2032	2032 - 2033	2033 - 2034	2034 - 2035	2035 - 2036													
Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year													
Campus Forecast Adjustment																												
2020 - 2021																												
Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Total Year	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	2025 - 2026	2026 - 2027	2027 - 2028	2028 - 2029	2029 - 2030	2030 - 2031	2031 - 2032	2032 - 2033	2033 - 2034	2034 - 2035	2035 - 2036	
100	100	100	100	100	100	100	100	100	100	100	100	1000																

1  
2

3

4

Un-suppressed

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

Un-suppressed

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

Un-suppressed

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

## Campus-Level By Account & Division Form – Salary, Wages and Fringe

The screenshot displays the 'MYF Comp - CampusFCST - By Account/Div' form. At the top, there are tabs for 'By Account', 'By Division', 'By Account and Division', and 'Campus-Level Review'. The 'By Account and Division' tab is selected. Below the tabs, there are fields for 'Program', 'Project', and 'Fund'. The 'Fund' field is set to '100 - Auxiliary Enterprises' and is circled in red with a '1'. The main table has columns for 'Actual View', 'Budget View', 'Actual View', 'Forecast Input', 'Forecast Transfers', and 'Forecast Campus Forecast Adjustment'. The 'Forecast Campus Forecast Adjustment' section is circled in red with a '2' and labeled 'Suppressed'. The table contains data for various divisions and accounts, including '01 - Executive (LAC)', '02 - Academic Affairs (LAC)', '03 - School of Education (LAC)', '04 - Student Affairs (LAC)', and '07 - A&F (LAC)'. The 'Forecast' columns show data for years from 2018-2019 to 2024-2025.

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.

The screenshot illustrates the process of inserting a wedge. On the left, the 'Actions' menu is open, and 'Open Forecast Accounts' is selected. The main window displays the 'Insert\_Wedge\_CompAcct\_Div' dialog box with the following fields: 'Select Fund' (F\_138), 'Select Account' (A\_FRINGES), and 'Select Division'. The 'Launch' button is visible. An 'Information' pop-up message is shown with the text 'Insert\_Wedge\_CompAcct\_Div was successful.' and an 'OK' button.

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

The screenshot illustrates the steps to remove forecast accounts. The main window shows the 'Remove\_Wedge\_CompAcct\_Div' form with the 'Launch' button highlighted. The 'Actions' menu on the right shows 'Remove Forecast Accounts' as the selected option. A confirmation message at the bottom indicates the process was successful.

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.

The screenshot shows the 'Campus-Level Review' interface for 'MYF - CampusFCST - Review - PlanUWRp'. The 'Department' dropdown is set to '01 - Executive (LAC)'. The table below shows historical actual data and a multi-year forecast.

	Actual		Forecast				
	2019 - 2019	2019 - 2020	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025
	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year
Fund Total Total Revenue	174437	766419	1265135	0	0	0	0
Fund Total Sales Credits		-1000	50				
Fund Total Faculty Salary	23496	26535	106839	0	0	0	0
Fund Total Academic Staff Salary	363467	393677	404173	0	0	0	0
Fund Total Graduate - RA Salary					0		
Fund Total Graduate - PA Salary			1000				
Fund Total Student Salary			3000	0	0	0	0
Fund Total Salary PlanUW	380903	420212	615012	27000	0	0	0
Fund Total Fringe	113936	132626	36378	0	0	0	0
Fund Total Salary, Wages & Fringe	500890	552837	651390	27000	0	0	0
Fund Total Supplies and Expense PlanUW	26923	29181	906316	0	0	0	0
Fund Total Capital Expense			558555				
Fund Total Aid to Individuals & Orgs	162720	154000	72500				
Fund Total Special Purpose			100				
Fund Total Debt Service			102499	99999	99999	99999	99999
Fund Total Non Salary & Wages	180043	182181	1640020	99999	99999	99999	99999
Fund Total Expenses	690542	735019	2291410	129999	99999	99999	99999
Fund Total Net Activities	-516105	31400	-1026275	-129999	-99999	-99999	-99999

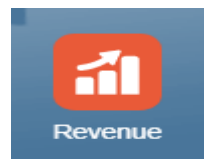
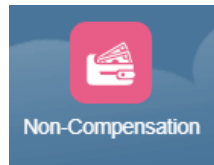
Provides historical Actual data, an overview of total forecast for multiple years.

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



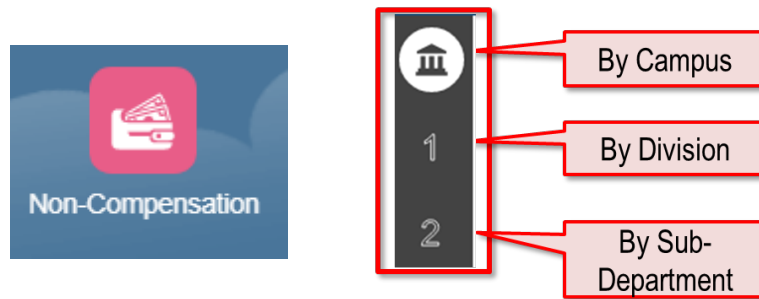
# Rinse and Repeat

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:

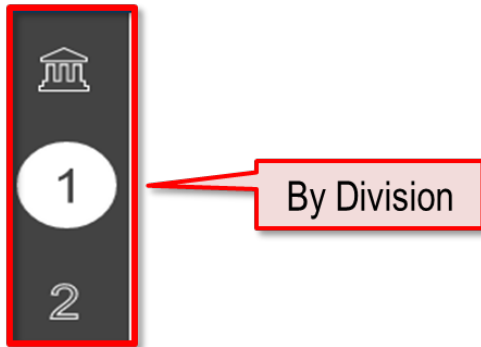
1. Click the **Multi-Year Forecast** tile to open the cluster
2. Click on the **Non-Compensation** tile to open the forms

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

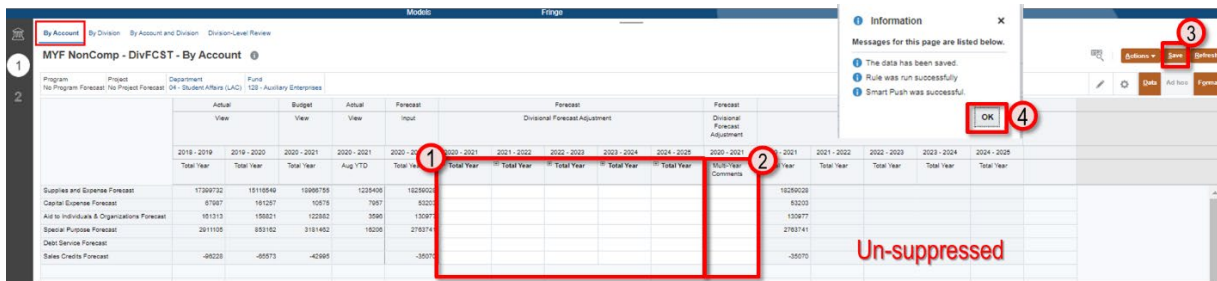


**Division-Level** – Enter forecast amounts at ‘Divisional-Level’ using Divisions, in By Account, By Division, By Account and Division Forms and use Divisional-Level Review to see total results.

## 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.

The screenshot shows a web-based forecasting interface. At the top, there are navigation tabs: 'By Account', 'By Division', 'By Account and Division', and 'Division-Level Review'. The main title is 'MYF Comp - DivFCST - By Div'. Below the title is a table with columns for 'Actual View', 'Budget View', 'Actual View', 'Forecast Input', 'Forecast Transfers', and several 'Forecast' columns under 'Divisional Forecast Adjustment', 'Divisional Forecast Adjustment', and 'Divisional Forecast'. The table lists various sub-departments like 'UNIVERSITY\_RELATIONS - UNIVERSITY\_RELATIONS (PCT)', 'UNIV\_CODE - University (PCT)', 'BRANCH\_CAMPUSES - Branch Campuses (PCT)', etc. A red box labeled '1' highlights a 'Total Year' column. Another red box labeled '2' highlights a 'Comments' column. A third red box labeled '3' highlights the 'Save' button in the top right corner. A fourth red box labeled '4' highlights the 'OK' button in a pop-up message box on the right side of the screen. The message box contains the text: 'Information', 'Messages for this page are listed below.', 'The data has been saved.', 'Rule was run successfully', and 'Smart Push was successful'. The word 'Un-suppressed' is written in red at the bottom left of the table area.

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.

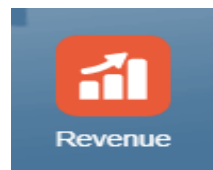
Provides historical Actual data, an overview of total forecast.

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



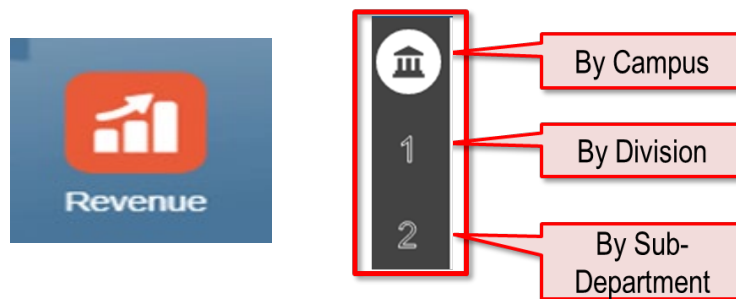
# Rinse and Repeat

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

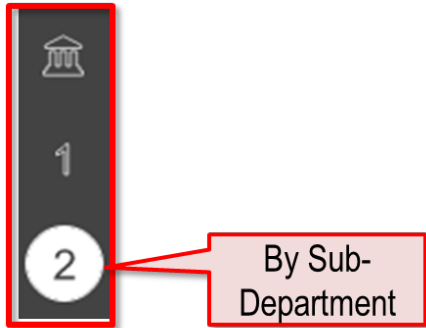


To begin the Revenue data input and review process:

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

The screenshot shows the 'MYF Rev - DeptFCST - By Account' report. At the top right, a red box labeled '1' highlights the 'Actions' dropdown menu. The menu is open, showing various options. At the bottom of the menu, a red box labeled '2' highlights the 'Open in Smart View' option. Below the table, a search bar contains the text '6b613a7f-814a-4...sr/nrk' and is highlighted with a red box labeled '3'. A 'Show all' button is visible to the right of the search bar.

Program	Project	Department	Fund	Actual		Forecast				Forecast				
				View	View	Departmental Forecast Adjustment		Departmental Forecast Adjustment	Departmental Forecast		Departmental Forecast			
2018 - 2019	2019 - 2020	2020 - 2021	2020 - 2021	2020 - 2021	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025
Total Year	Total Year	Total Year	Aug YTD	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year	Multi-Year Comments	Total Year	Total Year	Total Year	Total Year



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

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

## Changing POV - Revenue Data Smart View

	A	B	C	D	E	R	AE	AR	BE	BR	BS	BT	BU	BV	BW	BX	BY			
1		Actual View	Budget View	Actual View		Departmental Forecast Adjustment					Forecast					Departmental Forecast				
2		2018 - 2019	2019 - 2020	2020 - 2021	2020 - 2021	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025					
3		Total Year	Total Year	Total Year	Aug YTD	+Total Year	+Total Year	+Total Year	+Total Year	+Total Year	Multi-Year Comments	Total Year	Total Year	Total Year	Total Year	Total Year	Total Year			
5	9199 - Minnesota Reciprocity	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing			
6	9230 - Federal Aid	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing			
7	9240 - State Appropriations	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing			
8	9245 - State Grants and Contracts	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing			
9	9173 - Flex Option Tuition	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing			
10	9175 - Prior Year Academic Fees	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing			
11	Undergrad Tuition Forecast	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing			
12	Grad Tuition Forecast	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing			
13	Business Masters Tuition Forecast	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing			
14	EXT Credit Fees PlanUW	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing			
15	Interession Tuition PlanUW	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing	#Missing			

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.

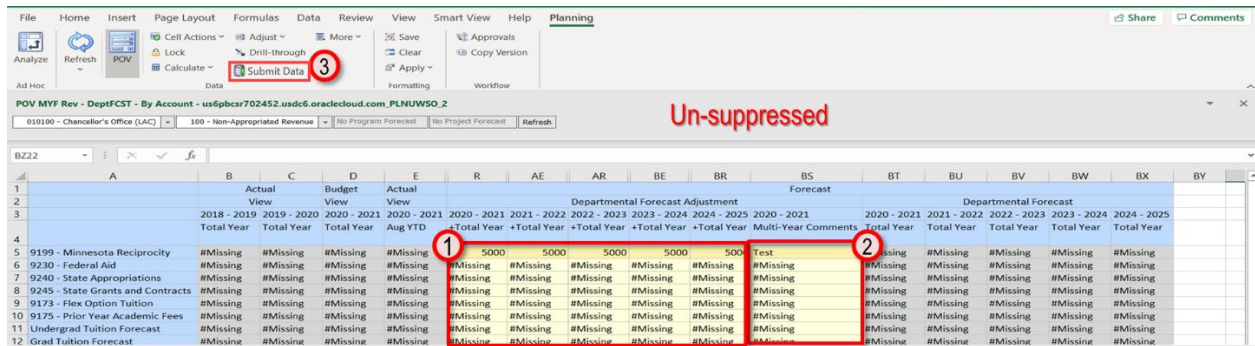


**Note:** If you know the name of the member you are looking for you can type it into the dropdown, and Smart View will filter the list.

## 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.

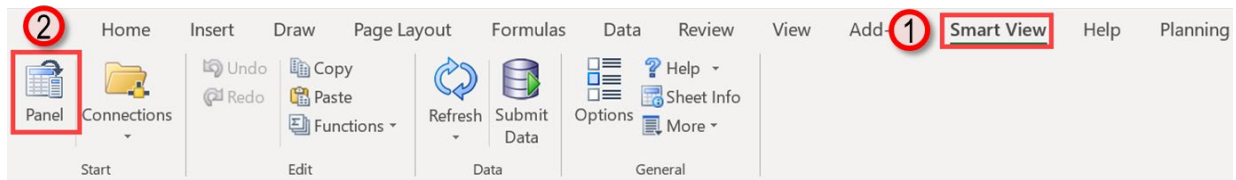


1. Enter data in the **Total Year** column (by Total Year or Month)
2. Enter comments in the **Comment** column, if needed
3. Once done, click **Submit Data** to save the sheet




**Note: There is no pop up to confirm that data has saved.**

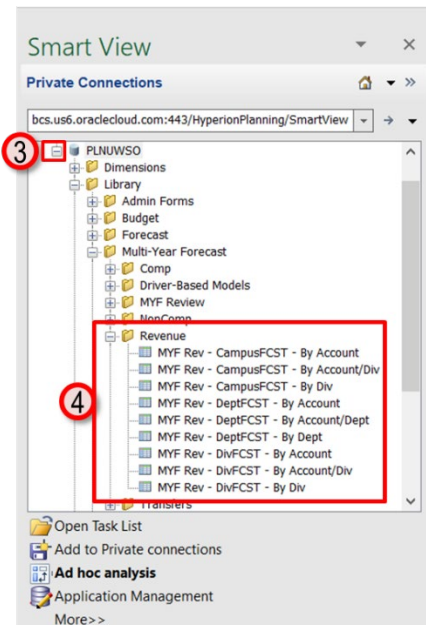
## Navigating to New Forms in Smart View



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.

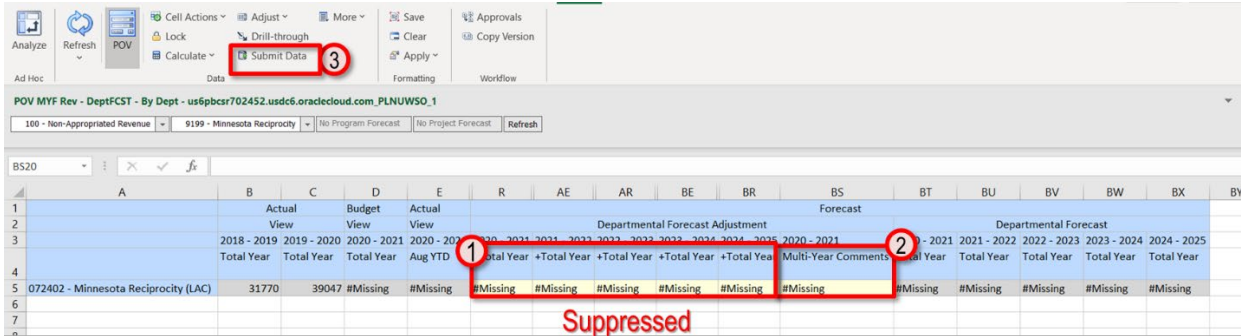




## Sub-Department-Level By Sub-Department Form- Revenue Data

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.



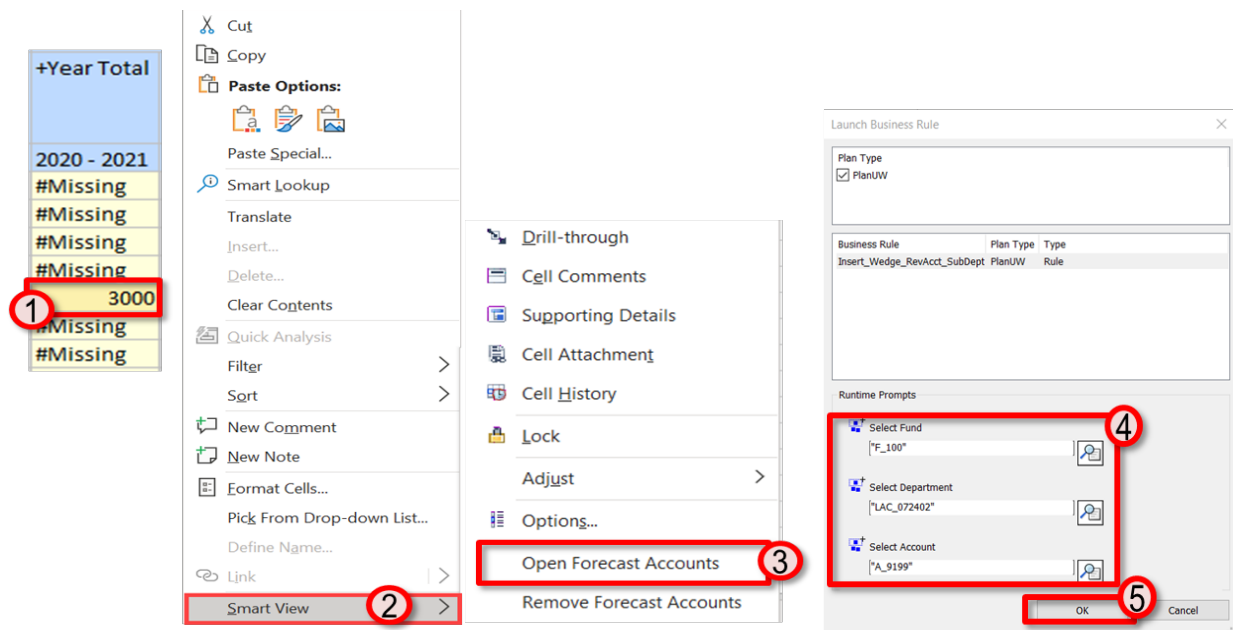
1. Enter data in the **Total Year** column (by Total Year, Total Quarter or Total Month)
2. Enter comments in the **Comment** column, if needed
3. Once done, click **Submit Data** to save the sheet

## 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.



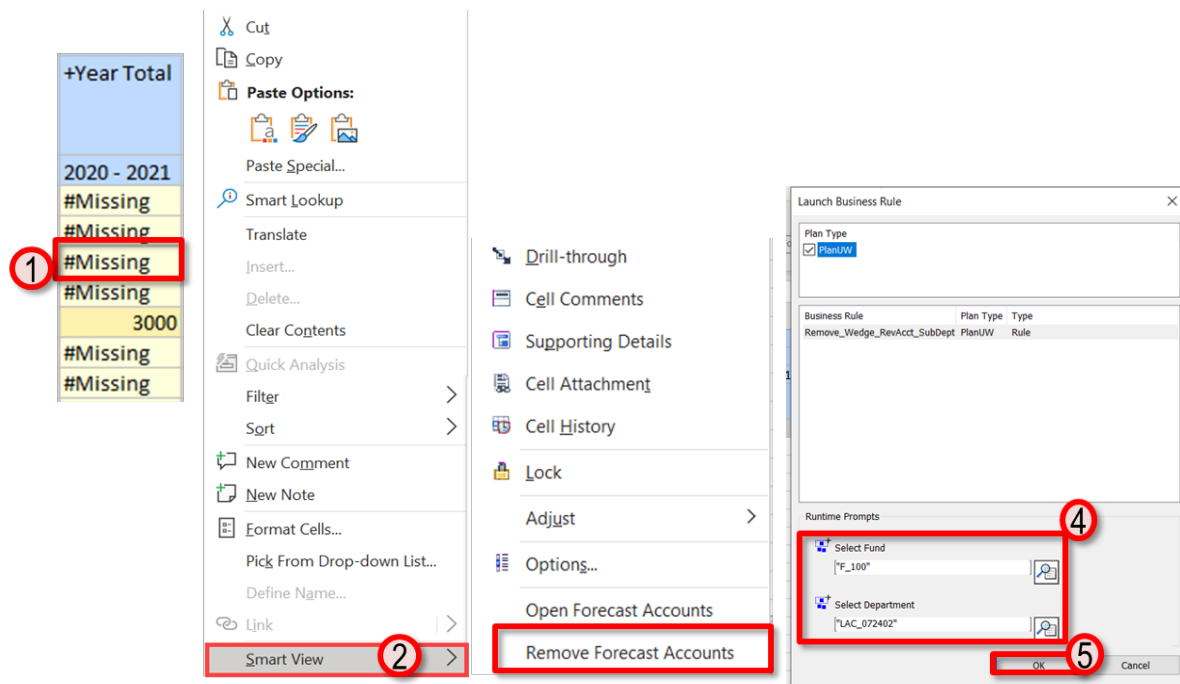
After entering data in the **Total Year** column:

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

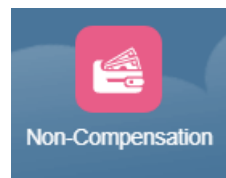


After entering data in the **Total Year** column:

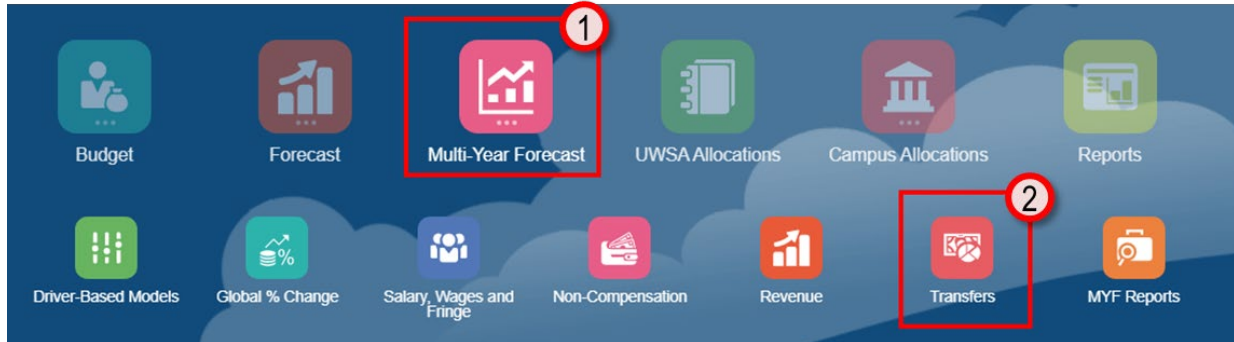
1. Right click on the cell where data was entered
2. Select **Smart View** from the right click menu
3. Select **Remove Forecast Accounts**
4. Select **Sub-Department** and/or **Fund** using the selector
5. Click **OK**.

## 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.

The screenshot shows the 'MYF Transfers - By Account' interface. At the top, there are navigation tabs: 'By Account', 'By Sub-Department', and 'By Account and Sub-Department'. Below this is a header section with 'Scenario Forecast', 'Version Transfers', 'Project No Project Forecast', 'Program No Program Forecast', 'Fund 102 - GPO - Non-Doctoral Cluster', and 'Department 010100 - Chancellor's Off'. The main table has columns for '2020 - 2021', '2021 - 2022', '2022 - 2023', '2023 - 2024', and '2024 - 2025', each with a 'TotalYear' sub-column. The first row is 'Fringe PlanUW'. The second row is 'Salary - Other PlanUW' with a value of '-2,000' in the 2021-2022 column. A 'Comments' column is on the right. An 'Information' pop-up is visible at the top right with an 'OK' button. In the top right corner, there are buttons for 'Actions', 'Save', and 'Refresh'. Red callouts are placed as follows: 1. A red box around the forecast year columns. 2. A red box around the 'Comments' column. 3. A red box around the 'Save' button. 4. A red box around the 'OK' button in the pop-up.

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.

By Account **By Sub-Department** By Account and Sub-Department

**MYF Transfers - By Department**

Scenario: Transfers | Version: No Project Forecast | Project: No Program Forecast | Fund: 152 - GPO - Non-Doctoral Cluster | Account: Salary - Other PlanUW

	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	2020 - 2021
TotalYr	TotalYr	TotalYr	TotalYr	TotalYr	TotalYr	Comments
101000 - Library-Gent OperationsSupport (PLT)	4100					transfer fr supplies
201000 - Provost-Vice Chancellor (PLT)	6500					Test
251032 - Teaching & Technology Center (PLT)	6300					distribute equally to 10 months
281003 - Graduate Programs-Student Svcs (PLT)	-15300					redistribute to 10 open months
551000 - Registrar (PLT)	15300					redistribute to 10 open months

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

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.

The screenshot displays the 'MYF Transfers - By Account/Department' interface. The table below shows the data for various accounts and sub-departments across forecast years. Red boxes and numbers 1-4 highlight key actions: 1. Data entry in the forecast years; 2. Comment entry; 3. Save button; 4. OK button in the information pop-up.

Scenario Forecast	Version Transfers	Project No Project Forecast	Program No Program Forecast	Fund 102 - GPO - Non-Doctoral Cluster	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	Comments
					TotalYear	TotalYear	TotalYear	TotalYear	TotalYear	
781000 - Library-Genl OperationsSupport (PLT)	Salary - Other Plan/UW				4100					
	Supplies and Expense Forecast				-4100					transfer to supplies
	Capital Expense Forecast				10000	10000	10000	10000	10000	transfer to salaries
201000 - Provost-Vice Chancellor (PLT)	Salary - Other Plan/UW				-6300					test
251032 - Teaching & Technology Center (PLT)	Salary - Other Plan/UW				6300					distribute equally to 10 months
281003 - Graduate Programs-Student Svcs (PLT)	Salary - Other Plan/UW				-15390					redistribute to 10 open months
551000 - Registrar (PLT)	Salary - Other Plan/UW				15390					redistribute to 10 open months

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

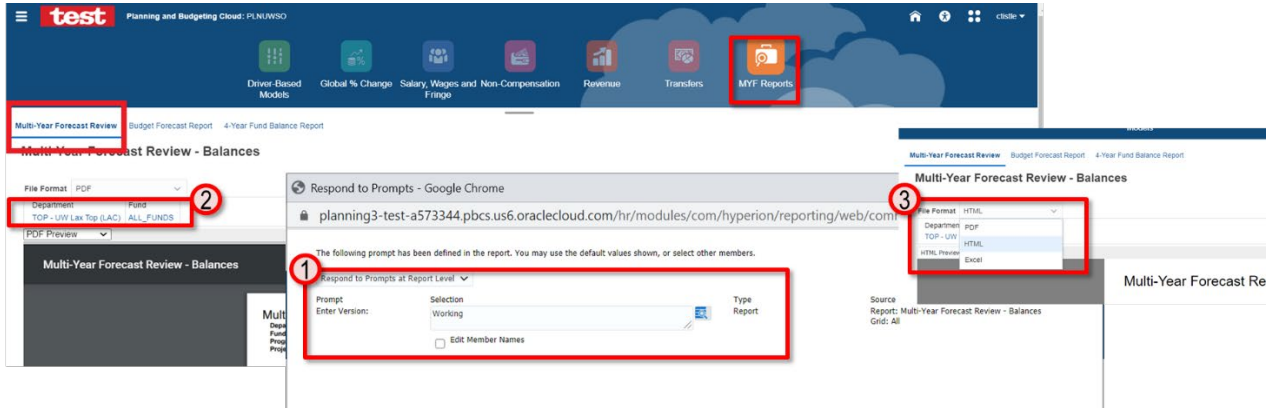
# Multi-Year Forecast Reports



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

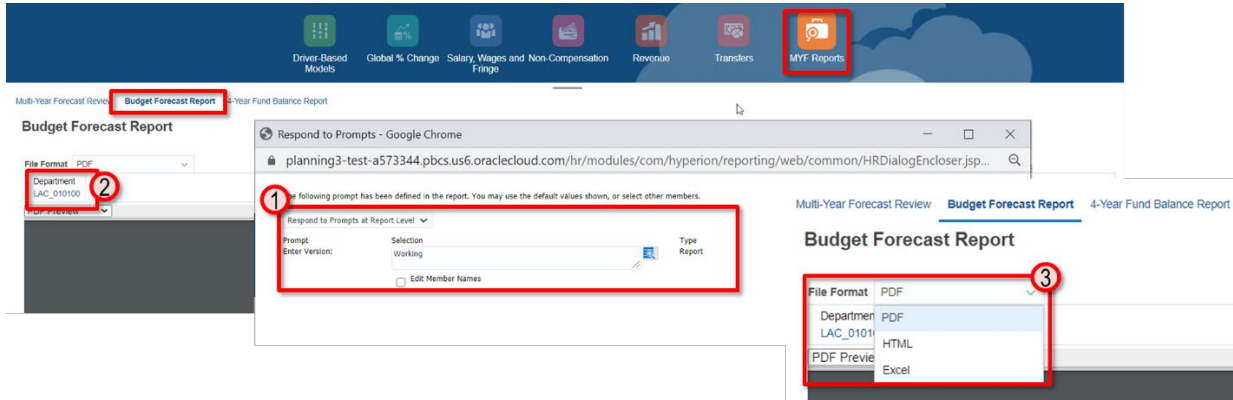
1. Select the Version member when prompted (Working, Campus, Divisional, Sub-Departmental)
2. Select a Department and Fund where you know there is data for your institution
3. Select File Format: PDF, HTML or Excel

Multi-Year Forecast Review - Balances

File Format: HTML  
 Department: TOP - UN Law Top (LAC) ALL\_FUNDS

	2018 - 2018	2019 - 2020	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025
	Actual	Actual	Forecast	Forecast	Forecast	Forecast	Forecast
	Year Total	Year Total	Year Total	Year Total	Year Total	Year Total	Year Total
<b>Revenues and Operating Transfers</b>							
9199 - Minnesota Reciprocity	-	\$30,047	-	-	-	-	-
9230 - Federal Aid	\$52,469,239	\$54,149,845	\$57,607,242	\$4,389,914	-	-	-
9299 - State Appropriations	-	\$94,159,953	\$30,550,539	-	-	-	-
9300 - State Grants and Contracts	-	-	-	-	-	-	-
Tuition	\$52,791,942	\$53,677,154	\$133,279,601	\$71,788,725	\$66,461,745	\$66,521,619	\$67,900,680
Application Fees	\$370,594	\$354,862	\$200,916	\$8,114	-	-	-
Continuing Ed Fees	\$603,865	\$911,340	\$1,039,435	\$115,325	-	-	-
Mail Fee	\$398,522	\$692,351	\$900,537	\$255,865	-	-	-
Student Fees	\$14,911,283	\$14,855,901	\$11,664,945	(\$120,313)	\$36,239	\$38,375	\$45,458
Miscellaneous Revenue	\$9,094,725	\$4,207,47	-	-	-	-	-
Transfers (Revenue)	\$994,541	(\$51,969,893)	-	-	-	-	-
Housing Revenue	\$13,240,977	\$13,570,74	-	-	-	-	-
Printing Revenue	\$1,040,443	\$1,006,93	-	-	-	-	-
Textbook Sales & Rental	-	\$144,44	-	-	-	-	-
<b>Expenses</b>	\$3,880,770	\$3,950,493	\$554,292	\$4,762,746	\$4,762,746	\$4,436,186	(\$326,560)
<b>Net Activities</b>	(\$1,915,273)	\$1,114,748	\$155,463	(\$3,437,792)	(\$3,437,792)	(\$3,297,653)	\$140,139
<b>Beginning Fund Balance</b>	-	-	\$2,487,075	\$2,487,075	-	\$2,487,075	\$2,487,075
<b>Adjusted Net Activities</b>	(\$1,915,273)	\$1,114,748	\$2,642,538	(\$950,717)	(\$3,437,792)	(\$810,578)	\$2,627,214
<b>Net Activities</b>	(\$1,915,273)	\$1,114,748	\$155,463	(\$3,437,792)	(\$3,437,792)	(\$3,297,653)	\$140,139
<b>Beginning Cash Balance</b>	-	-	\$3,818,467	\$3,818,467	-	\$3,818,467	\$3,818,467
<b>Cash Balance</b>	(\$1,915,273)	\$1,114,748	\$3,973,930	\$380,675	(\$3,437,792)	\$520,814	\$3,958,606
Deferred Revenue	-	-	-	-	-	-	-
Accounts Payable	-	-	-	-	-	-	-
Accounts Receivable	-	-	-	-	-	-	-
PrePaid Expenses	-	-	-	-	-	-	-
Cash Adjustments	-	-	-	-	-	-	-
<b>Adjusted Cash Balance</b>	(\$1,915,273)	\$1,114,748	\$3,973,930	\$380,675	(\$3,437,792)	\$520,814	\$3,958,606

# Budget Forecast Report - Multi-Year Forecast Reports



## Budget Forecast Report

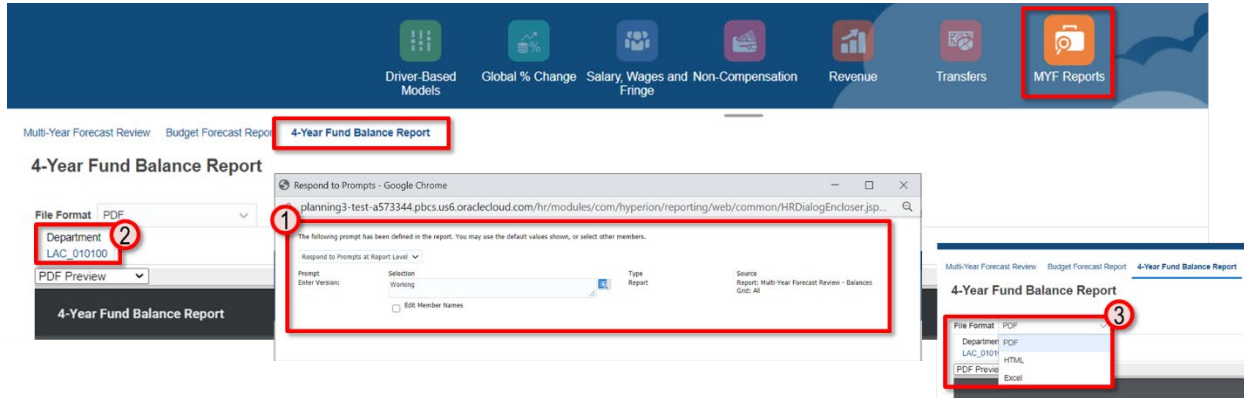
1. Select the Version member when prompted (Working, Campus, Divisional, Sub-Departmental)
2. Select a Department where you know there is data for your institution
3. Select File Format: PDF, HTML or Excel

## Budget Forecast Report

University of Wisconsin - 163034 - Dining Plans (PKS)

	Plan Final 2020 - 2021	Difference between CY Budget vs. CY Forecast Adjustments	Forecast				
			Working				
			2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	
<b>Revenue</b>							
GPR: General Program Operations	-	-	-	-	-	-	
Tuition and Fees	-	-	-	-	-	-	
GPR: Miscellaneous	-	-	-	-	-	-	
Auxiliary Enterprises	\$2,400,000	(\$94,856)	\$2,305,144	\$485,357	\$502,139	\$530,346	
General Operations	-	-	-	-	-	-	
Other Unrestricted Program Revenue	-	-	-	-	-	-	
Federal Indirect Cost Reimbursement	-	-	-	-	-	-	
<b>Total Unrestricted</b>	<b>\$2,400,000</b>	<b>(\$94,856)</b>	<b>\$2,305,144</b>	<b>\$485,357</b>	<b>\$502,139</b>	<b>\$530,346</b>	
Gifts	-	-	-	-	-	-	
Nonfederal Grants and Contracts	-	-	-	-	-	-	
Federal Grants and Contracts	-	-	-	-	-	-	
Other Restricted Program Revenue	-	-	-	-	-	-	
Trust Funds	-	-	-	-	-	-	
Other Appropriated Funds	-	-	-	-	-	-	
GPR Debt Service	-	-	-	-	-	-	
<b>Total Restricted</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	
<b>Revenues</b>	<b>Total Unrestricted + Restricted</b>	<b>\$2,400,000</b>	<b>(\$94,856)</b>	<b>\$2,305,144</b>	<b>\$485,357</b>	<b>\$502,139</b>	<b>\$530,346</b>
<b>Expenses</b>							
Salary PlanUW	-	-	-	-	-	-	
Fringe	-	-	-	-	-	-	
<b>Total Salaries and Fringe Benefits</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	
Supplies and Expense PlanUW	\$2,400,000	(\$112,110)	\$2,287,890	-	-	-	
Sales Credits	-	-	-	-	-	-	
Capital Expense	-	-	-	-	-	-	
Aid to Individuals & Orgs	-	-	-	-	-	-	
Other (Debt Service/Transfer out to DOA/Special Purpose)	-	-	-	-	-	-	
<b>Expenses</b>	<b>Fund Total</b>	<b>\$2,400,000</b>	<b>(\$112,110)</b>	<b>\$2,287,890</b>	<b>-</b>	<b>-</b>	
<b>Revenue less Expense</b>	<b>-</b>	<b>\$17,254</b>	<b>\$17,254</b>	<b>\$485,357</b>	<b>\$502,139</b>	<b>\$530,346</b>	

## 4-Year Fund Balance Report - Multi-Year Forecast Reports



### 4-Year Fund Balance Report

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

Fund Balance Report  
 Fiscal Year: 2020 - 2021 - 2023 - 2024  
 Department: 163034 - Dining Plans (PKS)

		Unrestricted					Restricted				Total	Grand Total
		GPR & Tuition	Auxiliary (128 and 228)	General Operations (138 and 236)	Other Unrestricted (xxx)	Federal Indirect (150)	Gifts (134,135,233, and 533)	Nonfederal Grants and Contracts (133)	Federal Grants and Contracts (144)	Other Restricted Program Revenue (xxx)		
Beginning Fund Balance	2020 - 2021	-	-	-	-	-	-	-	-	-	-	-
Revenues excd Transfers	2020 - 2021	-	\$2,305,144	-	-	-	\$2,305,144	-	-	-	-	\$2,305,144
Revenue Transfers	2020 - 2021	-	-	-	-	-	-	-	-	-	-	-
Expenses excd Transfers	2020 - 2021	-	\$2,287,890	-	-	-	\$2,287,890	-	-	-	-	\$2,287,890
Expense Transfers	2020 - 2021	-	-	-	-	-	-	-	-	-	-	-
Estimated Ending Fund Balance	2020 - 2021	-	\$17,254	-	-	-	\$17,254	-	-	-	-	\$17,254
Change		-	\$17,254	-	-	-	\$17,254	-	-	-	-	\$17,254
Beginning Fund Balance	2021 - 2022	-	-	-	-	-	-	-	-	-	-	-
Revenues excd Transfers	2021 - 2022	-	\$485,357	-	-	-	\$485,357	-	-	-	-	\$485,357
Revenue Transfers	2021 - 2022	-	-	-	-	-	-	-	-	-	-	-
Expenses excd Transfers	2021 - 2022	-	-	-	-	-	-	-	-	-	-	-
Expense Transfers	2021 - 2022	-	-	-	-	-	-	-	-	-	-	-
Estimated Ending Fund Balance	2021 - 2022	-	\$485,357	-	-	-	\$485,357	-	-	-	-	\$485,357
Change		-	\$485,357	-	-	-	\$485,357	-	-	-	-	\$485,357
Beginning Fund Balance	2022 - 2023	-	-	-	-	-	-	-	-	-	-	-
Revenues excd Transfers	2022 - 2023	-	\$502,139	-	-	-	\$502,139	-	-	-	-	\$502,139
Revenue Transfers	2022 - 2023	-	-	-	-	-	-	-	-	-	-	-
Expenses excd Transfers	2022 - 2023	-	-	-	-	-	-	-	-	-	-	-
Expense Transfers	2022 - 2023	-	-	-	-	-	-	-	-	-	-	-
Estimated Ending Fund Balance	2022 - 2023	-	\$502,139	-	-	-	\$502,139	-	-	-	-	\$502,139
Change		-	\$502,139	-	-	-	\$502,139	-	-	-	-	\$502,139
Beginning Fund Balance	2023 - 2024	-	-	-	-	-	-	-	-	-	-	-
Revenues excd Transfers	2023 - 2024	-	\$530,346	-	-	-	\$530,346	-	-	-	-	\$530,346
Revenue Transfers	2023 - 2024	-	-	-	-	-	-	-	-	-	-	-
Expenses excd Transfers	2023 - 2024	-	-	-	-	-	-	-	-	-	-	-
Expense Transfers	2023 - 2024	-	-	-	-	-	-	-	-	-	-	-
Estimated Ending Fund Balance	2023 - 2024	-	\$530,346	-	-	-	\$530,346	-	-	-	-	\$530,346
Change		-	\$530,346	-	-	-	\$530,346	-	-	-	-	\$530,346

# Smart View Visual Reference

**ORACLE®**

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**SMART VIEW**

# SMART VIEW HOME PAGE

The screenshot displays the Microsoft Excel interface with the Smart View add-in. The ribbon is set to 'Planning Ad Hoc' and includes tabs for Analysis, Data, Workflow, and Query. The main grid shows a table with columns A through R and rows 1 through 29. A context menu is open over the grid, listing options: Scenario, Version, Project, Fund, Program, and Refresh. The Smart View pane on the right, titled 'Smart View', shows 'Shared Connections' for 'EPM Cloud'. The tree view includes a folder 'planning5-test-a573344.pbcs.us6.oraclecloud.com' containing sub-items: Dimensions, Library, Admin Forms, User Forms, Budget Review, Input Forms, Expenses, Revenues, Task Lists, PlanUJW, and PlanUJWP. At the bottom of the Smart View pane, there are options to 'Add to Private connections', 'Ad hoc analysis', and 'Set Active Connection for this Worksheet'.

# PLANNING TAB ICON DESCRIPTION

The image shows a screenshot of the Oracle Planning software interface. The top ribbon contains various icons for data manipulation and analysis. Red callout boxes provide descriptions for these icons. The interface includes a menu bar (File, Home, Insert, Page Layout, Formulas, Data, Review, View, Smart View, Help), a ribbon with icons for Zoom In, Zoom Out, Member Selection, Cascade, Cell Actions, Submit Data, Task List, Pivot, Remove Only, Keep Only, Change Alias, Refresh, Adjust, Calculate, and POV. A Smart View pane on the right shows a tree view of data sources. A POV dialog box is open at the bottom, showing dropdown menus for Scenario, Version, Project, Fund, and Program, along with a Refresh button.

**Zoom In**  
Retrieve data for the selected members as specified for Zoom In Level in Smart View Options, or select from the drop-down menu.

**Zoom Out**  
Zoom out on data in the selected cell.

**Member Selection**  
Select members for the POV.

**Cascade**  
Create separate reports for members of one dimension on separate sheets in a worksheet. You can cascade reports in the current workbook or in a new workbook.

**Cell Actions**  
Perform actions on or view information associated with the selected cell.

**Submit Data**  
Save data updates in the worksheet to the data source.

**Task List**  
Guide users through their process.

**Pivot**  
Pivot a dimension or member.

**Remove Only**  
Delete all selected members and associated data.

**Keep Only**  
Delete all members and associated data except the selected members.

**Change Alias**  
Select an alias table for the grid.

**Refresh**  
Refresh the data on the current worksheet from the data source.

**Adjust**  
Select options for adjusting the value of the selected data cells.

**Calculate**  
Select options for calculating data..

**POV**  
Use dropdowns to choose members



# SMART VIEW TAB ICON DESCRIPTION

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

**Undo**  
Undo the previous ad hoc operation.

**Sheet Info**  
Display general and connection info for worksheet

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

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

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

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