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<td>1.0</td>
<td>Initial Document Creation</td>
<td>Huron Consulting</td>
<td>2018</td>
</tr>
<tr>
<td>2.0</td>
<td>Added Forecast and PR Balance sections</td>
<td>Huron Consulting</td>
<td>08/28/2019</td>
</tr>
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<td>Removed Forecast and PR Balance sections</td>
<td>Jane Frankiewicz</td>
<td>11/5/20</td>
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Setting User Variables
**Step 1.**

Login to PlanUW: http://

**Step 2.**

Once in the home page, click on **Tools>User Variables**.
Step 3.

In the Variables page, click on the “User Variables” option first and then click on the drop-down link:

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

Step 4.

Members can be selected in two ways from the Member Selection window: Through the Search Bar, or by selecting Hierarchies. Click OK to save.
Step 5. – **FOR POWER USERS ONLY**

To set variables at Total Institution level, follow the same steps described in this section by selecting the Institution at the higher level.
Completing Budgeting Tasks in PlanUW Section

✓ Reviewing Salary Data
✓ Input Fringe Rates
✓ Calculating Fringe Using Rates Review
✓ Input Fringe Data
✓ Reviewing Fringe Data
✓ Input Non-Comp Data
✓ Reviewing Non-Comp Data
✓ Input Revenue Data
Salary & Wage Review

Salary, Wages and Fringe

Salary and Fringe Review
Step 1.

Start by clicking on the **Salary, Wages and Fringe** cluster. Then click on the **Salary and Fringe Review**:

![Salary and Fringe Review](Image)

Step 2.

The form should appear containing the data needed.

![Salary and Fringe Review Form](Image)

**NOTE:** Remember that you are able to change the POV by clicking on the DEPARTMENT TOTAL, FUND TOTAL, PROGRAM TOTAL, and NO PROJECT links and selecting the appropriate information.
Input Fringe Rates

- Salary, Wages and Fringe
- Salary and Fringe Review
- Direct Fringe Input
- Fringe Rate Calculation
Before Starting

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

- Campuses in the WEST, SO, and NE regions must set user variables. *This excludes the Madison and Milwaukee campuses.*
- Power and ADMIN Users must **set and push Global Rates** before starting the input process.
- The Calculating Fringe Using Rates process can be accomplished by following two options:
  - By entering and reviewing data by **Individual Staff Position Form**
  - By entering and reviewing data by **All Staff Position Form**
    - *Both options follow the same steps in the process.*
**Step 1. SETTING AND PUSHING GLOBAL RATES – POWER USERS ONLY**

Power Users should notice that the input part of the form will be blank and ready for input when the form is accessed after setting user variables.

![Global Fringe Rate Input Table]

**Step 2.**

Enter the desired Fringe Rates by Staff Type.

![Global Fringe Rate Input Table]
**Step 3.**

Click **SAVE** and click **OK** when the confirmation pop up window appears.

**Step 4.**

From the Actions drop down, select the **Apply Fringe Rates to Funds** option. This will populate all the rates for all funds and staff types.
**Step 5. CONTINUE TO CHANGE FRINGE RATES BY FUND IF NEEDED**

To change Fringe rates by specific funds, click on the populates rates and update to the desired rate. This will mark the cell yellow to indicate that a change has been made and it is **not saved yet**.

![Global Fringe Rate Input Table]

**Step 6.**

Click on SAVE to save the changes made. Remember that this will turn the cells from yellow to white indicating that the changes have been made.

![Global Fringe Rate Input Table with Save button highlighted]

**Step 7.**

Finalize by selecting **Actions** and **Push Rates by Fund**.

![Global Fringe Rate Input Table with Push Rates by Fund button highlighted]
Fringe Input Rates Process

**Step 1.**

From the Home page, click on the Salary, Wages, and Fringe cluster, and click on the Fringe Rate Calculation option.

![Image of PlanUW interface showing Salary, Wages, and Fringe cluster and Fringe Rate Calculation option]

**Step 2.**

Navigate to the Fringe Rate Adj and Review vertical tab and ensure that the form is in the Faculty/Academic form.

![Image of Faculty Academic Fringe Adjustment form]

---

PlanUW

Quick Reference Guide

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**Step 3.**

To begin, enter the desired Fund, Program, and Project if needed and ensure it is displayed before continuing.

**Step 4.**

Enter the rate in the appropriate department by using decimal points for percentage. Once done, click SAVE and OK in the pop up.
Step 5. TO REVIEW FRINGE USING RATES CALCULATION

Continue to click on the "Consolidated Review" vertical tab. Validate that the Fringe amounts calculated are correct (Below is only an example)
Input Fringe Data

Salary, Wages and Fringe

Salary and Fringe Review  Direct Fringe Input  Fringe Rate Calculation
**Step 1.**

To begin, click on the **Salary, Wages, and Fringes** cluster. Then, click on the **Direct Fringe Input** tile.

![Direct Fringe Input](image)

**Step 2.**

To begin, the form should automatically populate in **By Department**. This example will input at **Level 3** (the User can input at all levels, however). Check the **POV** and update accordingly if needed.

![By Department](image)
**Step 3.**

Enter the data in the Total Year column and use the Comments column if needed. Click SAVE once done and OK on the pop up.
Inserting Wedges

What is a Wedge?

Wedges (Open Budget Accounts Menu) are inserted when an account intersection does not have prior years of actuals. A wedge is inserted to allow users to budget for that intersection.

- An example of this is when a new department is created. Because new departments do not have any prior year actual data and will not show up on a form, a wedge is inserted with already existing department information.

- Inserting a wedge (or Opening Budget Accounts) opens accounts to be budgeted to.

Step 1.

To insert a wedge:

1. Click on the Pencil icon (Edit)
2. Select a fund that had no prior year actuals data.
3. Click on Apply.
4. Remember that no prior year data exists. Because of this, no data will be displayed.
Step 2.

1. Under the Actions drop down, click on Open Budget Accounts and enter the Department to budget to using the metadata dropdown. Then, click Launch.

Step 3.

The Department selected on step 2 of the previous slide should now appear along with a column for all Level 3 Accounts. The user now can enter data in the Total Year and Comments columns and continue to click Save when done.

Please continue to the ANNEX section (Page 95) for further options on inserting wedges.
**Reviewing Fringe Data**

**Step 1.**

To begin the fringe data review process, Click the **Salary, Wages and Fringe** cluster and Click on the **Salary and Fringe Review** to open the form.

**Step 2.**

Select the **Input Review tab** to confirm that the Actual Data columns look correct, review previously entered data in Fringe Input Data process and review rolled up data and validate it is correct.
Input Non-Compensation Data
A few things to consider before beginning the Non Compensation Input process:

- This input process can take place at all three levels.
- At all three levels, the input process can take place by:
  - By Department
  - By Program
  - By Department & Program
  - By Project
  - By Project, Department & Program (Madison only)
- This guide will cover the Non-Compensation Input process at Level 1 and it will cover it By Department, By Program, By Department & Program, By Project and By Project, Department & Program. This will be followed by an Input Review section.
**Step 1.**

To begin the Non-Compensation tile to open the spreadsheet.

**Step 2. Non Comp Input Process – [L1] – By Department**

By default, the form will open on Level 1 and By Department. To edit, click on the Edit – Pencil button:

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

---

**Step 3. Non Comp Input Process – [L1] – By Department**

1. Ensure that the correct budget accounts are displayed.
2. Confirm that the current year (2017-2018) is **read-only** (Grey)
3. The **next fiscal year budget and comment columns** should be available for input. Enter data and comments, and click **Enter** once done. This should turn the cells **yellow**.
4. Click **Save** once done.

---

At this point, the user can continue to insert a wedge if needed. To insert a wedge, return to the INSERTING WEDGES section or click **HERE**.
Step 1. Non Comp Input Process – [L1] – By Program

The process of budgeting By Program follows the same steps than the process of budgeting By Department:

1. Select your appropriate Fund and Project using the Point of View Member Selection OR using the pencil.
2. Input Data into several Programs
3. Save Data

At this point, the user can continue to insert a wedge if needed. To insert a wedge, return to the INSERTING WEDGES section or click HERE.
**Step 1. Non Comp Input Process – [L1] – By Department & Program**

To conduct a Non Comp Input By Department and Program, navigate to the By Department and Program Form.

**Step 2. Non Comp Input Process – [L1] – By Department & Program**

1. Select your appropriate Fund and Project using the Point of View Member Selection OR using the pencil as demonstrated in previous steps.
2. Enter data into several Programs or Accounts
3. Click Save.

At this point, the user can continue to insert a wedge if needed. To insert a wedge, return to the INSERTING WEDGES section or click HERE.
Step 1. Non Comp Input Process – [L1] – By Project

All pods also have a form with Projects in the rows. To adjust the POV in this form:

1. Select the Department to adjust the member via the Member Selector.
2. Select the Fund to adjust the member via the Member Selector.
3. Select the Program to adjust the member via the Member Selector.

At this point, the user can continue to insert a wedge if needed. To insert a wedge, return to the INSERTING WEDGES section or click HERE.

In the Madison pod there is an addition form By Proj, Dept and Prgm to facilitate data entry. To adjust the POV for this form:

1. Select the **Fund** to adjust the member via the Member Selector.

At this point, the user can continue to insert a wedge if needed. To insert a wedge, return to the INSERTING WEDGES section or click [HERE](#).
Reviewing Non-Compensation Data

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

- Input Review
- Trend Review
- PA Review level (Covered later in this QRG)
BEFORE CONTINUING - IMPORTANT

Remember that input forms for each level will be **unsuppressed for Input Review**. This means that input review forms at Level 1 will just contain Level 1 accounts. Level 2, however, will have Level 1 and 2 accounts, and Input Review form at Level 3 will contain Level 1, 2 and 3 accounts. HOWEVER, the input review forms in the last section will be **suppressed** to only show areas that have been budgeted in or had actuals in the past.
Unlike the other general input forms, Users will not be able to use the “account drop downs” or “Open Budget Accounts” in any of these forms.
## Step 1. Input Review

1. Confirm the Actual numbers are correct
2. Confirm Prior year budget amount by Major Class
3. Locate your Data entered within the input forms to see how the data rolls up to the Major Class

### NonComp Rollup Review (L1)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td>Total Year</td>
<td>Total Year</td>
<td>Y-T-D(Jun)</td>
<td>Total Year</td>
<td>Total Year</td>
</tr>
<tr>
<td></td>
<td>2,421,751</td>
<td>2,176,623</td>
<td>260,112</td>
<td>255,173</td>
<td>315,639</td>
</tr>
<tr>
<td>Salary</td>
<td>1,702,697</td>
<td>1,754,693</td>
<td>312,064</td>
<td>195,077</td>
<td>1,928,666</td>
</tr>
<tr>
<td>Fringe</td>
<td>685,344</td>
<td>775,521</td>
<td>176,004</td>
<td>66,129</td>
<td>156,711</td>
</tr>
<tr>
<td>Salary, Wages &amp; Fringe</td>
<td>2,391,041</td>
<td>2,530,214</td>
<td>488,069</td>
<td>295,206</td>
<td>2,064,357</td>
</tr>
<tr>
<td>Travel/Training/Recruiting</td>
<td>473</td>
<td>3,672</td>
<td>3,562</td>
<td>4,456</td>
<td>(894)</td>
</tr>
<tr>
<td>Maint &amp; Repairs PlanUW</td>
<td>55</td>
<td>39</td>
<td>351</td>
<td>368</td>
<td>107</td>
</tr>
<tr>
<td>Supplies</td>
<td>10,826</td>
<td>9,412</td>
<td>10,591</td>
<td>7,880</td>
<td>9,809</td>
</tr>
<tr>
<td>Services</td>
<td>8,160</td>
<td>8,828</td>
<td>2,008</td>
<td>242</td>
<td>360</td>
</tr>
</tbody>
</table>

### Step 2.

Make changes to any data in an editable cell and continue to **Save**.
Step 3. Trend Review

To conduct a Trend Review, once in the Consolidated Review tab, click on the Trend Review tab.

Step 4.

1. Review the Actual data.
2. View the current fiscal year's Redbook Budget
3. View the current fiscal year's Revised Budget
4. Validate the Budget entered from the input forms
5. Validate the Working vs. Redbook Budget Variance
Input Revenue Data
A few things to consider before beginning the Revenue Input process:

- This input process can take place at all three levels.
- At all three levels, the input process can take place by:
  - By Department
  - By Program
  - By Department & Program

This guide will cover the Revenue Input process at Level 1 and it will cover it By Department, By Program, and By Department & Program. This will be followed by an Input Review section.
**Step 1.**

To begin the input process for Revenue click the Revenue tile to open the spreadsheet.

![Revenue tile](image)

**Step 2. By Department**

The form will automatically display data By Department. For this example, as in previous steps, select a Fund, Program, and Project that has prior year actual data.

NOTE: To update the Fund information, click on Fund. The options to update the fund are shown next.

![By Department](image)
Step 3. Updating POV if Needed

Select the desired Fund, Fund Total, and specific Fund Total by selecting the checkmark icon. Continue to click OK. Ensure that the selected Fund is highlighted. Click on the Forward Arrow to execute the form.

Continue to complete this step again for the Program and Project option, if needed.

Remember! You can also change the POV by clicking on the pencil.

Step 4. By Department

Continue to enter data and comments. Click Save and OK when the pop-up appears.
Step 5. INSERT A WEDGE IF NEEDED

Refer to the Insert a Wedge section on page # for instructions.

Step 6. By Program

Start by selecting the By Program tab and continue to follow the previous steps described. Select By Department and Program from the top menu. Confirm data entered in Rev Budget By Dept (L1) and Rev Budget By Prgm (L1) forms appears in the Rev Budget By Dept and Prgm (L1) form as expected.
Step 7. By Department & Program

Select **By Department and Program** from the top menu. Confirm data entered in Rev Budget By Dept (L1) and Rev Budget By Prgm (L1) forms appears in the Rev Budget By Dept and Prgm (L1) form as expected.
Reviewing Revenue Data

**Step 1.**

Navigate to the Input Review form and confirm the actuals appear

![Input Review form](image)

**Step 2.**

Validate the data you Input in the previous forms appears in the Input Review form as well.

![Input Review form](image)
**Step 3.**

If needed, adjust and save Budget data.
Budget Review
The process of budget review section contains the instructions to conduct budget reviews for:

- Trend Reviews
- PA Reviews
- Review by Fund
- Fringe Level Checks
- Fringe Budget by Departments
- Non-Comp Level Check
- Version Copy Review
- How to Modify Data in Input Forms
- How to View Variances
- How to Copy a Fund Total
- How to Clear Versions.

All Budget Reviews begin in the Budget Review tile on the Home page:
Trend Review

**Step 1.**

Select **Trend Review** from the top menu. Continue to update the Department following the steps already mentioned.

Any member with a symbol on it is "drillable" in any of the forms within PlanUW. Click on this symbol to expand the members that rollup to the parent member as applicable for your budget review.
Step 2.

1. View the Actual data
2. View the current fiscal year's Redbook Budget
3. View the current fiscal year's Revised Budget
4. Validate the budget from previous inputs

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

Step 3.

Review the Working vs. Redbook Budget Variance is calculated correctly
**PA Review**

**Step 1.**
To continue to conduct a Planning Allocation review, click on the PA Review tab on the top menu.

**Step 2.**
Select the Department, Fund, and Project combination you wish to view on the PA Dashboard, and click the right arrow in the right hand corner to submit your selections.

---

*Only Madison and Milwaukee have planning allocation data at the Division/Department level. All other Institutions will only be able to select their Total University from the page dropdown.*
**Step 3.**

Use the form on the left hand side of the dashboard to view the working Budget, data loaded from the Planning Allocation tool, and the variance by **Salary, Fringe, and Non Compensation Expenditures.**

![Image of dashboard with tables and data]

**Step 4.**

Use the form on the right hand side of the dashboard to view the working Budget, data loaded from the Planning Allocation tool, and the variance for **Total Expenditures by Program.**

![Image of dashboard with tables and data]
Review By Fund

**Step 1.**

Use the form on the right hand side of the dashboard to view the working Budget, data loaded from the Planning Allocation tool, and the variance for **Total Expenditures by Program**.

![Review By Fund](image)

**Step 2.**

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

![Consolidated Review By Fund](image)
Step 3.

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

In the first year, the current fiscal year’s Budget will only exist at the Major Class level due to the level of detail required in 3270. However, going forward this budget will exist at whatever level was used to budget in the prior year in PlanUW.
Fringe Level Check

**Step 1.**

1. Navigate to the “Level Check Form” page. The page will default to the Fringe Level Check Review form.
2. Choose the Fund, Program and Project members from the page drop down.
3. After your page selections, confirm the Fringe Level Check review form appears with your "User Institution" in the Column.

---

Account overlaps may or may not be an issue depending on your own unique institutional, and departmental processes and controls, and how you plan to utilize the new Budget CoA.
Step 2.

View the fringe budget entries between the levels 1, 2, 3 and 4.
The following five accounts are in level 2 and 3, which will result in an account level overlap:
- Misc. Fringe
- FICA
- 1921 - Group Health Insurance – ER
- Other Group Health
- Fringe-Gift/Fed Trf
**Step 3.**

Click the button on the department member in the column to expand the department dimension to identify which division(s), department(s), and sub-department(s) potential improper overlaps may be occurring in.

There is Column Suppression on the webform, meaning users will only see the division(s), department(s), and sub-department(s) that have data.
Fringe Budget By Department

Step 1.

If you find any improper fringe account overlaps, navigate back to a Fringe webform of your choice (direct input or by rate) to adjust the data as applicable to fix the overlaps, and repeat the previous steps in Fringe Level Check to ensure the adjustment has taken affect in the “Fringe Level Check” form.

The screen shot on this step shows the Fringe Budget by Dept (L1) webform, but you can choose any Fringe Input webform to make your fringe budget modifications.
Non-Comp Level Check

Step 1.

Click the “NonComp Level Check” Horizontal Tab. Confirm the “NonComp Level Check” form opens.

Step 2.

1. Choose the Fund, Program and Project members from the page drop down.
2. View the Non Comp Expenditure budget entries between the levels 1, 2, 3.

Account overlaps may or may not be an issue depending on your own unique institutional, and departmental processes and controls, and how you plan to utilize the new Budget CoA. This form is meant to highlight where potential improper overlaps may have occurred, but not control the data entry processes as the PlanUW application has been specifically designed to provide flexibility for data entry institution by institution, and user by user.
Step 3.

Click the button on the department member in the column to expand the department dimension to identify which division(s), department(s), and sub-department(s) potential improper overlaps may be occurring in.

Step 4.

If you find any improper account overlaps, navigate back to a Non Comp webform of your choice to adjust the data as applicable to fix the overlaps, and repeat the previous steps in Non Comp Level Check to ensure the adjustment has taken affect in the “Non Comp Level Check” form.
Version Copy Review

Step 1.

Navigate to the "Copy Version" Form.

Please ensure your User Institution variable is set to the Department you wish to view in this form. The department values are aggregated automatically when a user opens the "Copy Version" form. However, to maximize performance on the form load time, the aggregation is based on the user Institution you set in user variables for every pod but Madison (using PA Hierarchy).
Step 2.

1. Choose a Department and Fund member from the page drop down.
2. Validate the working Budget is aggregated correctly based on your inputs from the input forms.

The Project dimension is fixed on the total project for the institution and cannot be changed. The Department dimension is fixed on the Divisional level, and the PA hierarchy level for your institution. The Fund dimension is fixed on the Fund groupings, so the 3-digit fund numbers are not selectable. The page selections are to correlate with the Budget Approval Status Tracker in subsequent steps.
Step 3.

Right click anywhere on the form or click the **Actions** button in the upper right hand corner to display the actions dropdown. Click the “**Copy to Campus Review**” menu to copy the working Budget to the Campus Review Version for the Department and Fund in the page.

![Image of form with actions dropdown and copy to campus review option highlighted]

Step 4.

Confirm the Campus Review Version is populated and no variance exists between the Working version and Campus Review version.

![Image of form with campus review version highlighted]
Status Approval Tracker – Ready for Campus Review

1. Navigate to the "Budget Approval Status Tracker" form
2. View the Budget Approval Status for your Division(s), or PA member(s) by Fund Grouping. Confirm the Division/Fund combination you copied from "Working" to the "Campus Review" version in the previous form is reflected with a status of "Ready for Campus Review" in this Webform.

A few things to consider:

- The "Budget Approval Status Tracker" form is constructed to mirror the "Version Copy" form in terms of what you can select and view for the Department and Fund Dimensions.
- The status should be "In Progress" for any Division/Fund combination you have input data into using the Input forms, and "Not Started" if you have not entered data yet.
Modifying Data in Input Forms

Step 1.

1. To change a cell on the "Budget Approval Status Tracker" from "Not Started" to "In Progress", or back to "In Progress" from "Ready for Campus Review" navigate back to any input form.
2. Choose members from the page drop down.

Step 2.

1. Select a 3-digit fund underneath a Fund grouping that was previously "Not Started", and click "Ok"
2. Click the right arrow on the right hand side to submit your selections.

CONTINUE TO NEXT PAGE FOR IMAGES
Step 3.

To enter data in this form, simply enter data in an editable cell and click save.
Status Approval Tracker – In Progress

Step 1.

1. Navigate back to the "Budget Approval Status Tracker" form.
2. Confirm the Division/Fund combination you modified data for is reflected with a status of "In Progress" in this Webform
View Variances

Step 1.

1. Navigate back to the "Copy Version" form
2. View the variances between the working Budget and the Campus Review version, based on the additional data you input
Copy Fund Total

Step 1.

1. Select "Fund Total" from the Page dropdown
2. Right click anywhere on the form or click the Actions button in the upper right-hand corner to display the actions dropdown. Click the "Copy to Campus Review" menu to copy your working Budget to the Campus Review Version for Fund Total.

Step 2.

Confirm the Campus Review Version is populated and no variance exists between the Working version and the Campus Review version.
Status Approval Tracker – Ready for Campus Review (All Funds)

Step 1.

1. Navigate back to the "Budget Status Approval Tracker" form.
2. Confirm All Funds now have a status of "Ready for Campus Review" pushed to them via the version copy from "Working" to "Campus Review".

Similar to the Fund Dimension, if you are a Power User or an End User with access to all Institutions you will be able to view the status for all Divisions (or PA members for Madison) on this form, and be able to change your page selection for department on the "Version Copy" form to the total institution to push the status of "Ready for Campus Review" to every Division (or PA member for Madison) as well.
**Copy to “Final” – For Power Users Only**

**Step 1.**

1. Navigate back to the “Version Copy” form.
2. Select a specific Fund grouping, or "Fund Total" from the Page dropdown.

**Step 2.**

Right click anywhere on the form or click the Actions button in the upper right hand corner to display the actions dropdown. Click the “Copy to Final” menu to copy your working Budget to the Final version.
Step 2.

Confirm the Final Version is populated and no variance exists between the Working version and the Final version.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Budget</td>
<td>Budget</td>
<td>Final</td>
<td>Final v. Working variance</td>
</tr>
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</tbody>
</table>

[Image of the Consolidated Review Version Copy table]
**Status Approval Tracker – Complete**

**Step 1.**

1. Navigate back to the "Budget Status Approval Tracker" form.
2. Confirm the Funds in which you copied now have a status of "Final" pushed to them via the version copy from "Working" to "Final".

![Image of Budget Approval Status Tracker form with completed status for each fund category]
Clear Versions

Step 1.

1. Navigate back to the "Version Copy" form.
2. Right click anywhere on the form or click the Actions button in the upper right hand corner to display the actions dropdown. Click the “Clear Campus Review” or "Clear Final" menu to clear old versions as applicable.

You do not need to clear old versions before re-copying data from working as the Copy menus completely overwrite the past values. However, this utility may be leveraged for Institutions/Users for any Institutional specific processes as applicable now or in the future.
Status Approval Tracker – In Progress

Step 1.

1. Navigate back to the "Budget Approval Status Tracker" form.
2. Confirm the Funds in which you cleared now have a status of "In Progress" pushed to them via the version clear.

The clear menu will change the Budget Approval Status back to "In Progress" regardless of if you choose to clear the final version, or the campus review version. The working version cannot be cleared with the clear menu.
Budget Reports
There are 8 budget reports. Each report can be opened in HTML, PDF, and Excel formats using Chrome, Firefox, and Internet Explorer and the steps are exactly the same.

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

*For space reasons, only the Budget Summary report will include all browser and format steps. All reports can be opened following the exact instructions.
**NOTE: Point of View Change**

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

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

**Step 1.**

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

**Step 2.**

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

**Step 3.**

From the File Format drop-down, select the format desired. For this section of the presentation, select HTML.
Step 4. Reviewing the Report in HTML

HTML Budget Summary reports are interactive: Columns expand or collapse and the user has access to expand data to more granular levels:
(The Year Column expands to monthly data by clicking on the drop down icon)

HTML Reports can also be downloaded. To download the report, scroll down and click on the Export In Query-Ready Mode. The report will open in Excel. Follow the protocol of your browser to open the downloaded file (For Chrome, the file download bar shows on the bottom of the screen, etc.)
Budget Summary in PDF Format - Chrome

Step 1.

To download reports:
   1. Click the download icon *(the pop-up Save As will appear)*
   2. Name the report on the File Name field
   3. Save the file.

* Remember where the file is saved!

Open the file once downloaded and it will display in PDF format.
Budget Summary in PDF Format - Firefox

Step 1.

1. Click the download icon *(the pop-up Save As will appear)*

2. Click on Save File.

3. The top right corner of the browser will display the download icon. Click on it and click on the file once the download completes.
Budget Summary in PDF Format - IE

Step 1.

1. Click the Open option (Save or Save as if desired)

2. Name the report on the File Name field

3. Click on Open
**Budget Summary in Excel Format**

**Step 1.**

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

This time, the report will download automatically. Follow the steps described before according to the browser you are using (Chrome, Firefox, Internet Explorer).
Step 2.

The Excel file is now downloaded and can be opened.

Remember - When the downloaded file is opened in Excel, the file loses its connection to the database. The file, however, can now be manipulated with Excel functions. Also remember that the file is not connected via Smart View.
Expense Budget Report in HTML

Step 1.

To access the Expense Budget report, as mentioned, follow the previous steps described. Once the form displays, select the Expense Budget Report tab and desired format, as described before.

Once the report displays, depending on the format, you can now interact with it.
Budget Review Report in HTML

Step 1.

To access the Expense Budget report, as mentioned, follow the previous steps described. Once the form displays, select the Expense Budget Report tab and desired report format, as described before.

Once the report displays, depending on the format, you can now interact with it.
Salary Review Report in HTML

Step 1.

To access the Salary Review report, as mentioned, follow the previous steps described. Once the form displays, select the Salary Review tab and desired file format, as described before.

In this example, the form is displayed under a PDF format. Remember that PDF file formats allow the use to print the form directly!
Summary by Program Report in HTML

Step 1.

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

Step 1.

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

**Step 1.**

Like all reports, the Summary by Program and Fund report is opened following the same steps.
Budget Vs Actual Report in HTML

**Step 1.**

Like all reports, the Budget and Actual report is opened following the same steps.
Smart View Visual Reference

ORACLE

SMART VIEW
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.
Annex
Opening Budget Accounts – Right-Click Method

If the sub department you need to budget for is already on the form, but the account you need is not, the right click method can be used to open budget accounts. This method will save you time because the sub department you right click on will pass into the menu prompt. This is in contrast to the original method when the sub department in not on the form, so you need to use the actions menu instead.

To open budget accounts using the right click method please follow the steps below:

**Step 1.**

In this scenario, $5,000 needs to be budgeted for Equipment PlanUW in the 021010 – Provost Support (OSH) sub department. 021010 – Provost Support (OSH) is on the form, but Equipment PlanUW is not.

Once the POV has been selected and the form is displayed (Step 1 of page 22), right-click on the department that the account needs to be inserted into to display the Actions drop-down (For this example, right-click on 021010 – Provost Support (OSH) Department):

![Image of the right-click method](image-url)

**Step 2.**

Click on Open Budget Accounts to bring up the menu screen. You should notice that the Select Department field is already populated with the information from the sub department you right-clicked on. Click Launch (In this example, the field will display OSH_021010).
Step 3.

Once the accounts are inserted, the form will display all the budget accounts for the level you are at for the specific sub department:

Step 4.

Enter $5,000 under **Equipment PlanUW**, click on **Save**, and click **OK**.
Removing Budget Accounts

To remove the accounts that were inserted and not needed, right-click on the sub department again and select Remove Opened Budget Accounts on the drop-down menu.

*Note – It is not required for you to remove the budget accounts you do not need, but you are encouraged to use this functionality if you would like to cleanup your input forms.

Click Launch.

Remove_Wedge_NonComp_L1

* Select Project "No_Project_OSH"
* Select Fund "F_102"
* Select Program "P_6"
* Select Department "OSH_021010"
After the **Remove Opened Budget Accounts** menu is launched, the form will only display the accounts that have budget data input, and the accounts that were originally on the form (due to having actuals data in prior years) even if they don’t have budget data.