UNIVERSITY OF WISCONSIN SYSTEM
SYSTEM ADMINISTRATION BUDGET OFFICE

Guide to Using the Web-based Planning Allocation View
February 1, 2008

Before using the web-based planning allocation system, you need to have completed the following:

1.) Have a 3-character Logon ID assigned by DOIT,
2.) Submit an authorization form to DOIT; required to assign a password,
3.) Have web browser with Java Virtual Machine installed &
4.) Have an Adobe Reader installed

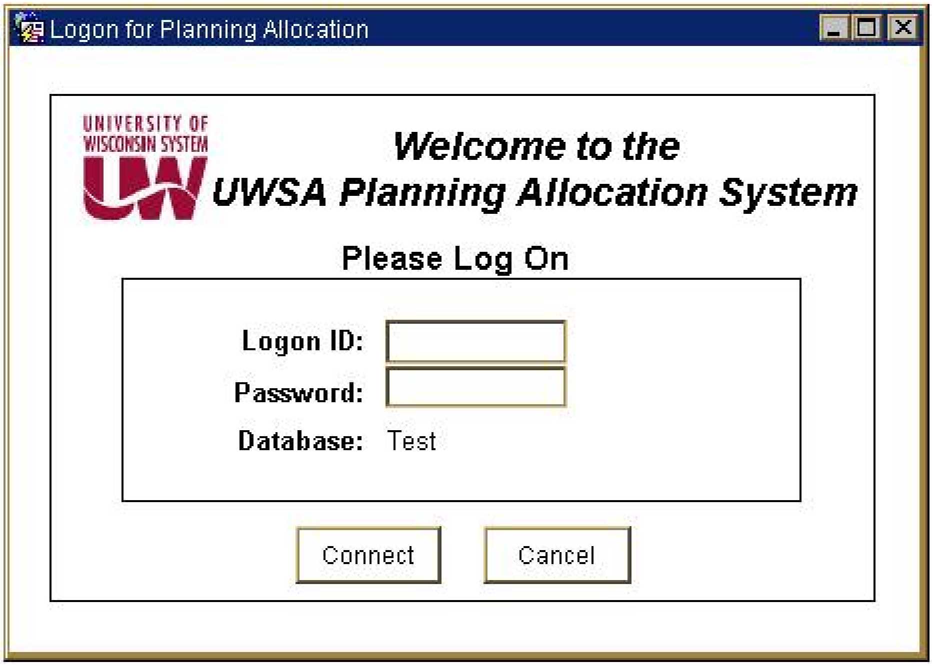
To use the Web-based Planning Allocation System the employee must have a 3-character Logon ID assigned by DOIT. Before a Logon ID can be assigned the employee needs to have an appointment in the UW payroll system. For most departments this means the HR department must enter the employee into the IADS system. A Logon ID cannot be assigned to a person who is not entered into the payroll system. The URL, http://www.doit.wisc.edu/restricted/authorization/3char.asp, is DOIT's website address for requesting the 3-character Logon ID.

Once you have a 3-character Logon ID, you need to fill out a 'Production Application Role Authorization Form' which can be found at: http://www.uwsa.edu/budplan/onlinereports.htm.

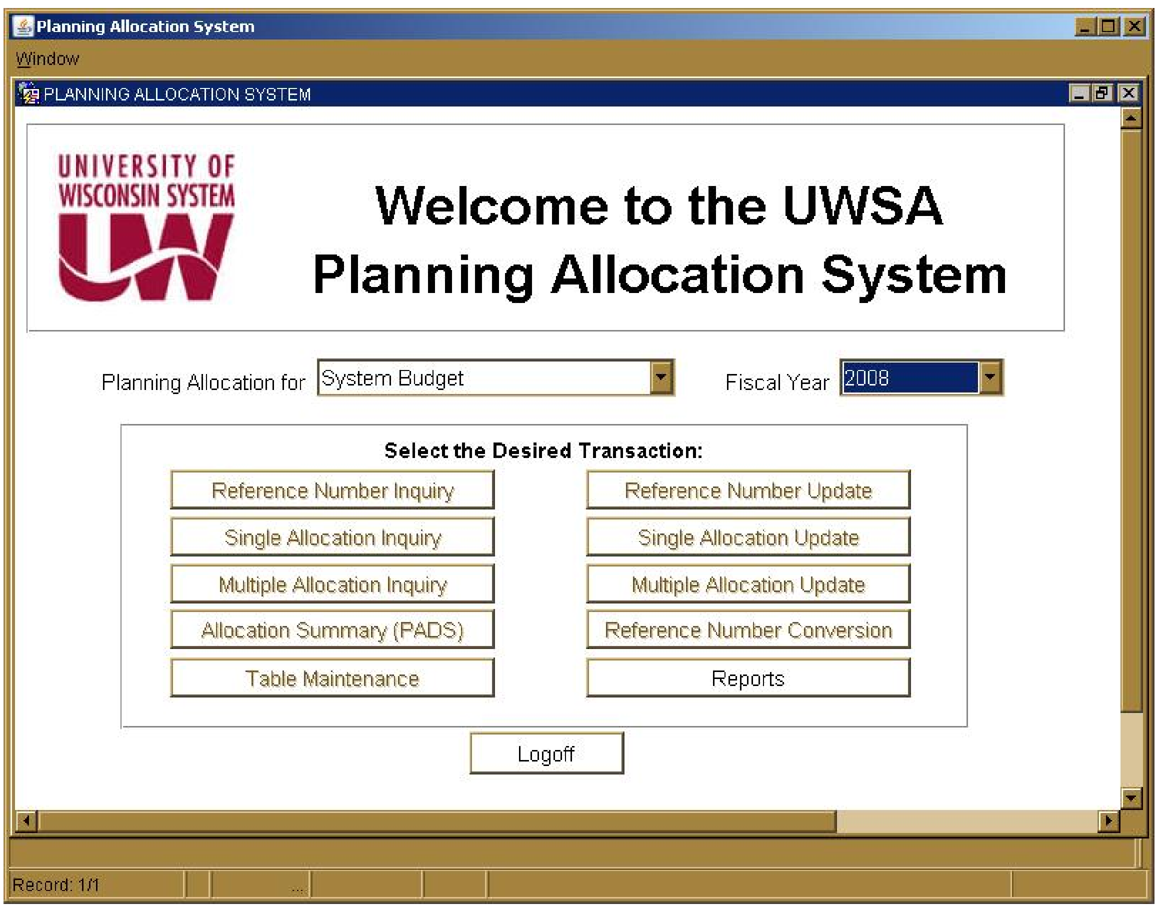
Any questions concerning the installation of the Java Virtual Machine or the Adobe Reader should be addressed to your local IT support person.

STEP ONE: To access the Web-based Planning Allocation System the user has two options. The first option would be to go directly to the UWSA Planning Allocation System Log On screen using the URL https://orprd4.doit.wisc.edu/pa/pa.html.
The second option would be go to the UW System Administration Budget Office On-line Reports page using URL http://www.uwsa.edu/budplan/onlinereports.htm, and then click on the Planning Allocation Reports link.

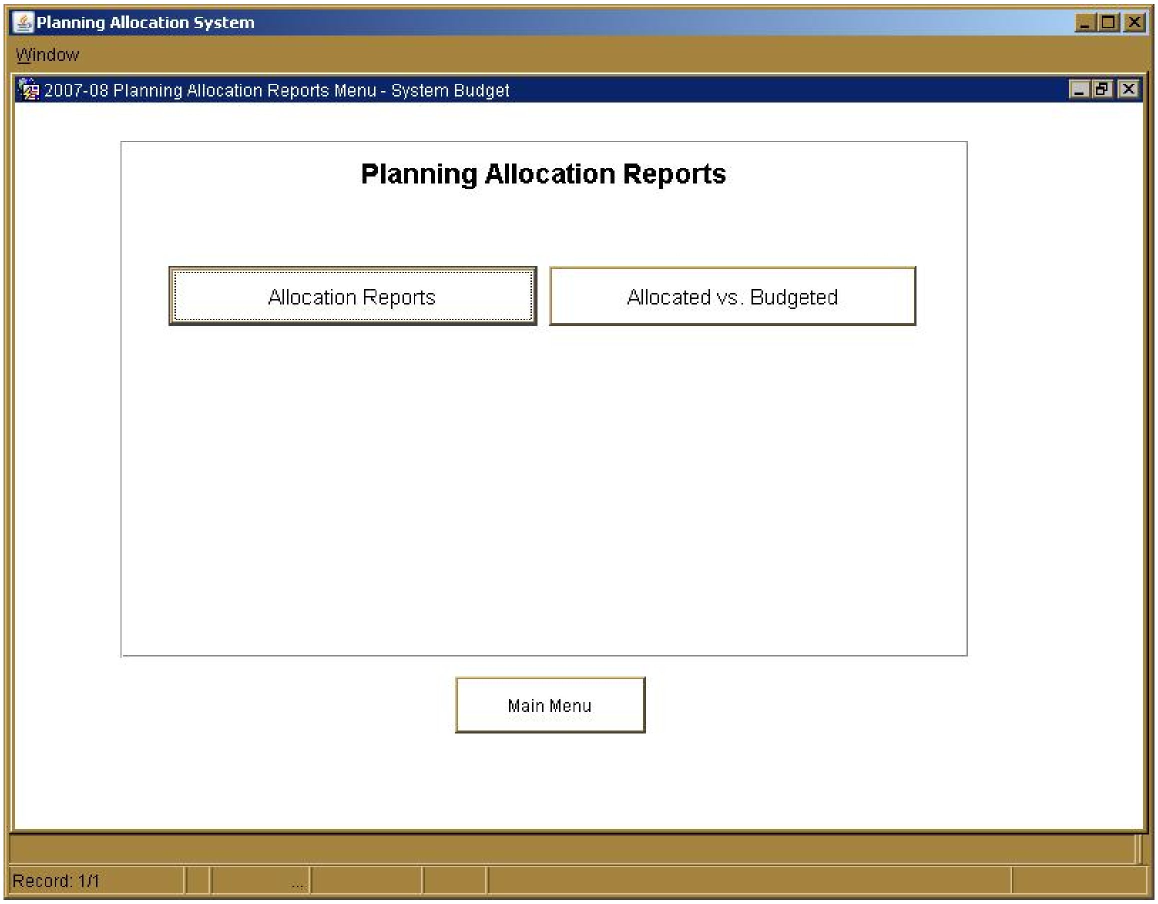
The following screen will appear.



STEP TWO: Enter your 3-character Logon ID and password, and then click on the "Connect" button to continue. The Planning Allocation Main Menu screen will appear.

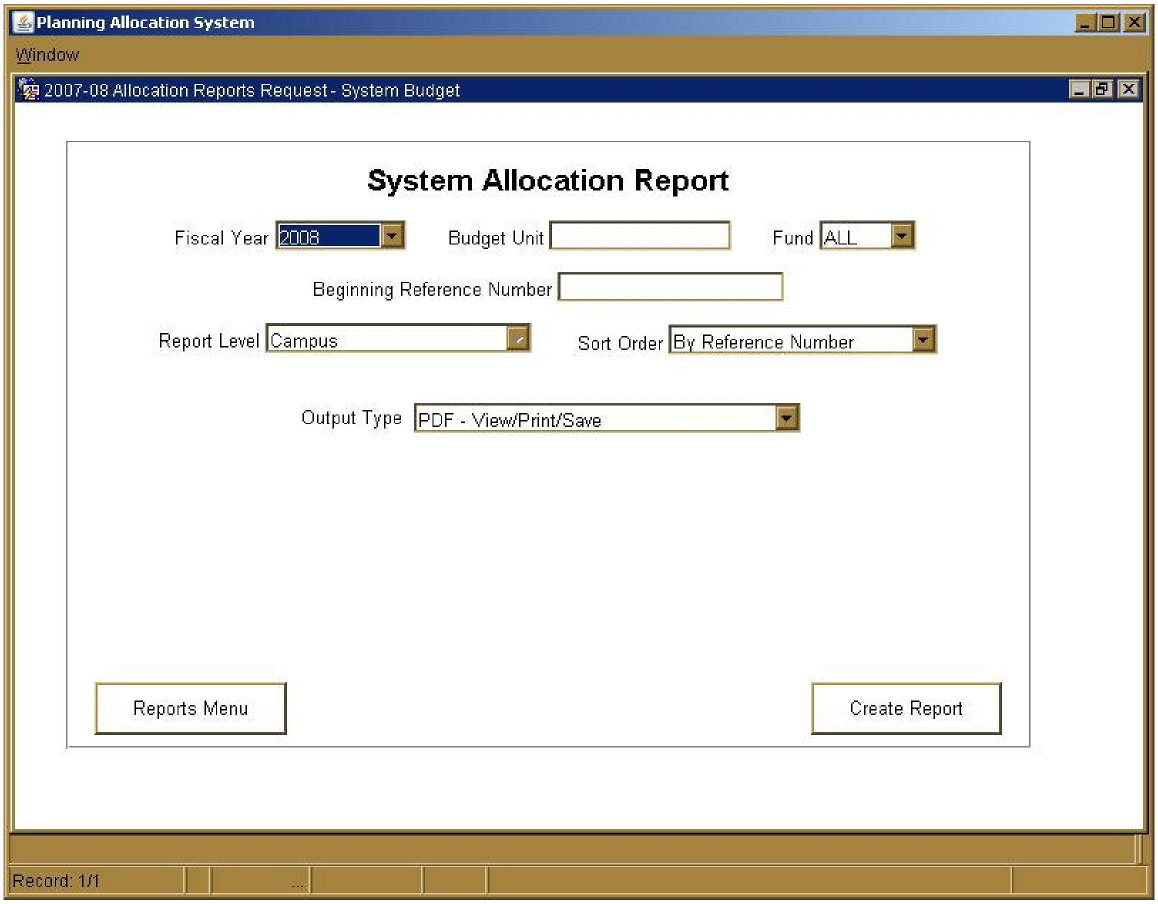


STEP THREE: To review the planning allocations reports the users need only to click on the Reports option. The following screen will appear.



STEP FOUR: User selects either the Allocation Reports or the Allocated vs. Budgeted. ("Allocated vs. Budgeted" is currently referred to as the "PADS" report)

If you select the 'Allocation Reports' - The following Allocation Report criteria screen will appear.



STEP FIVE. The user needs to do the following four things:

1. Fill in the Budget Unit., (C for Eau Claire, L for Stout, etc..)
2. Select either a Fund Group or a Fund,
3. Select a new Fiscal Year if the default year is not correct,
4. Select Create Report button.

NOTE: The user is only allowed to view the UDDS assigned to his/her Logon ID. Any questions or concerns should be directed to Gary Buehler at gbuehler@uwsa.edu or 608-262-6715.

Once the report is generated, an Adobe Reader window should open up to display the report. You can navigate through the report just as you would any other Adobe file (e.g. use page up, page down, use the bookmarks along the left, the searching capability to locate a particular text string, etc.) The first page of the report will be the header page, followed by the actual allocation report. The sample below shows what the reports will look like.

UNIVERSITY OF WISCONSIN - SAMPLE
200X-0X BUDGET PLANNING ALLOCATIONS
FUND 000

ALLOCATION REFERENCE NUMBER 001
200X-0X PRINTED BUDGET BASE

Salaries	Student Services 0	Institutional Support 1	Instruction 2	Hospitals 3	Research 4	Public Service 5	Academic Support 6	Physical Plant 7	Auxiliary Enterprises 8	Financial Aid 9	Farm Operations F	Undistributed Y	Total
Unclassified Salaries	1,792,555	1,804,223	10,221,846		33,018	265,529	2,352,877	173,629					16,643,677
Graduate Assistant Salaries			184,365										184,365
Classified Salaries	928,636	1,337,023	530,001		3,698	91,553	879,515	1,369,799					5,140,225
Classified LTE Salaries	11,484	56,820			12,811	50,000	15,500	9,000					155,615
Classified Student Help	94,422	69,606	70,463		1,359	25,164	294,301	88,527					643,842
FTE													0
Total Salaries	2,827,097	3,267,672	11,006,675	0	50,886	432,246	3,542,193	1,640,955	0	0	0	0	22,767,724
Non-Salaries													
Supplies & Expense	269,236	1,535,763	1,352,632		5,527	74,478	916,139	566,393					4,720,168
Sales Credits	-197,630	-1,356,739	-265,650			-30,000	-121,800	-316,000					-2,287,819
Capital			94,910				528,502	33,902					657,314
Aids to Individuals													0
Special Purpose													0
Total Non-Salaries	71,606	179,024	1,181,892	0	5,527	44,478	1,322,841	284,295	0	0	0	0	3,089,663
UNDISTRIBUTED													0
Fringe Benefits													0
Total	2,898,703	3,446,696	12,188,567	0	56,413	476,724	4,865,034	1,925,250	0	0	0	0	25,857,387

FTE Positions	
Permanent	408.32
Graduate Assistant	8.50
Total FTE Positions	416.82

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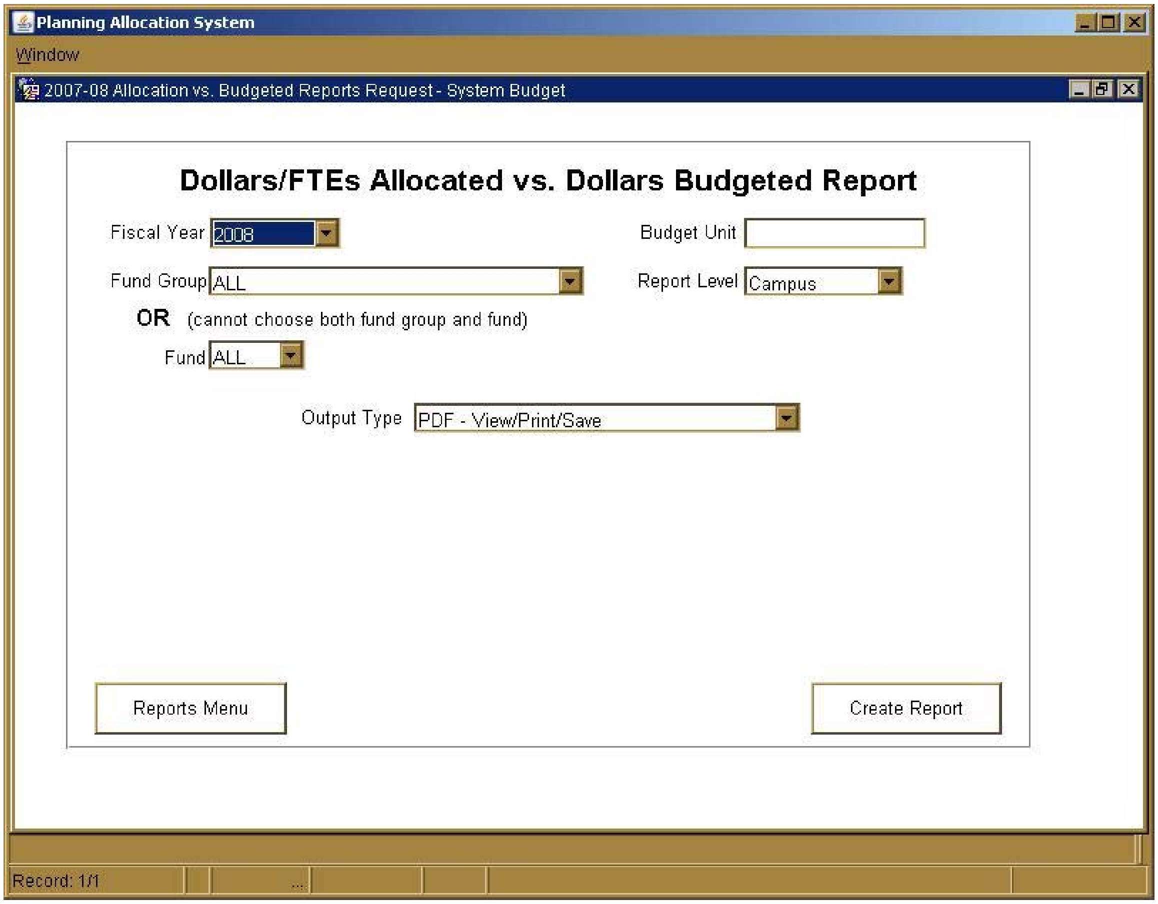
<u>STEP SIX.</u> Closing the Budget Planning Allocation Report will get you back to the <u>System Budget Allocation Report</u> Screen. From this screen select "Reports Menu" to return to the <u>Planning Allocation Reports</u> Screen.

<u>STEP SEVEN</u> The <u>Allocated vs. Budgeted</u> report can be selected from this screen. ("<u>Allocated vs. Budgeted</u>" is currently referred to as the "PADS" report)

The following Dollars/FTEs Allocated vs. Budgeted Report screen appears.



STEP EIGHT The user needs to do the following four things:

1. Fill in the Budget Unit.,
2. Select either a Fund Group or a Fund,
3. Select a new Fiscal Year if the default year is not correct,
4. Select Create Report button.

Once the report is generated, an Adobe Reader window should open up to display the report. You can navigate through the report just as you would other Adobe file (e.g. use page up, page down, use the bookmarks along the left, the searching capability to locate a particular text string, etc.) Here is a sample 'Allocated vs Budget' Report.

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200X-0X Budget Planning Allocations
University of Wisconsin System
Comparison of Planning Allocations vs Budget Requests

Org ID **S - University Of Wisconsin - Sample** **S**

Fund 000	Budget Allocation	Budget Request	Variance
PROGRAM			
0 Student Services	42,189	3,339,718	3,297,529
1 Institutional Support	28,512	4,472,965	4,444,453
2 Instruction	1,318,305	24,341,966	23,023,661
4 Research	2,159	79,463	77,304
6 Academic Support	61,244	7,452,174	7,390,930
7 Physical Plant	6,738	2,942,697	2,935,959
Total Program:	1,459,147	42,628,983	41,169,836
MAJOR CLASS			
S & W			
Unclassified Salaries	1,202,375	27,516,602	26,314,227
Graduate Assistant Salaries	4,372	218,696	214,324
Total S & W:	1,206,747	27,735,298	26,528,551
Non-S & W			
Supplies & Expense	39,900	7,291,709	7,251,809
Capital	212,500	578,035	365,535
Total Non-S & W:	252,400	7,869,744	7,617,344
Total Major Class:	1,459,147	35,605,042	34,145,895