

KB – CAT Summary Reporting Page

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Purpose and Overview

The CAT Summary Report is an online page within the CAT solution that allows users to summarize key metrics critical for analyzing compensation distribution against the employee population. This page allows for flexibility in summarizing information from the CAT page, focusing on compensation changes and Continuing Staff Basis. Users can access the Summary Reporting page to monitor the allocated compensation changes as a percentage of the continuing staff base to make sure it is meeting the pay plan guidelines.

The CAT Summary Report only reflects data entered into the CAT page and does not include data from the AAP page. The report calculates data for “CSB FTE” and “CSB Amount” marked as yes in the “Add Salary to Continuing Staff Base?” check box from the CAT page and only summarizes data for the Action Reasons that are marked “Include in CSB” on the Annual Setup Page for each institution. For reference, please see the Annual Setup KB on the CAT Project User Acceptance Testing web page.

CAT Summary Page Functionality

Search Criteria Section

The screenshot displays the 'CAT Summary Page' interface. The 'Search Criteria' section is highlighted with a red border and contains several input fields and checkboxes. The fields are organized into columns: 'Parameters', 'Drill Down', 'Selection Type', 'Roll Up', and 'Description'. The 'Parameters' column includes fields for '*Fiscal Year' (set to 2016), 'Funding Business Unit', 'Funding Division', 'Funding Department', 'Fund', 'Program', 'Project Id', 'Staff Type', 'Empl Class', and 'Action Reason'. The 'Drill Down' column has radio buttons for each parameter. The 'Selection Type' column has text input fields. The 'Roll Up' column has checkboxes, all of which are checked. The 'Description' column is empty. To the right of the search criteria is a 'Search Save' section with a search bar, 'Save', and 'Delete' buttons. Below the search criteria is a 'Run' button, and below that are 'Clear Drill Down' and 'Reset All' buttons. Numbered callouts 1 through 7 are placed over the interface: 1 points to the 'Search Criteria' header, 2 points to the 'Drill Down' column, 3 points to the 'Selection Type' column, 4 points to the 'Roll Up' column, 5 points to the 'Description' column, 6 points to the 'Run' button, and 7 points to the 'Search Save' section.

1. **Parameters**

- Fiscal Year
- Funding Business Unit
- Funding Division
- Funding Department
- Fund
- Program
- Project Id
- Staff Type
- Employee Class
- Action Reason

2. The **Drill Down** radio button provides the option to view data at a greater level of detail

- Example: Reviewing *Funding Division* totals in a particular *Funding Business Unit*

Search Criteria																		
Parameters			Drill Down	Selection Type			Roll Up			Description								
*Fiscal Year				2016														
Funding Business Unit			<input type="radio"/>	UWSYS			<input type="checkbox"/>			UW System Wide								
Funding Division			<input checked="" type="radio"/>				<input checked="" type="checkbox"/>											
Results																		
Personalize Find View All First 1-10 of 10 Last																		
Fiscal Year	Funding BU	Funding Division	Funding Dept	Fund	Program	Project Id	Staff Type	Empl Class	Action Reason	CSB FTE	CSB Amount	Non-Merit Percent	Non-Merit Amount	Merit Percent	Merit % of CSB	Merit Amount	Variance	Drill Down
TOTAL	UWSYS	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	198.125000	\$14,536,940	0.000	\$36,261	1.000	\$145,369	\$160,289	\$-14,920	Drill Down
2016	UWSYS Y10	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	9.000000	\$743,533	0.000	\$0	1.000	\$7,435	\$7,446	\$-11	Drill Down
2016	UWSYS Y20	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	10.250000	\$793,675	0.000	\$0	1.000	\$7,937	\$9,366	\$-1,429	Drill Down
2016	UWSYS Y30	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	4.000000	\$336,155	0.000	\$0	1.000	\$3,362	\$3,363	\$-1	Drill Down
2016	UWSYS Y36	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	6.500000	\$518,084	0.000	\$0	1.000	\$5,181	\$5,184	\$-3	Drill Down

- The following applies when using the **Drill Down** button
 - Only one can be selected at a time
 - Corresponding **Roll Up** must be “unchecked”
 - **Funding Division** cannot be drilled down without first specifying the **Funding Business Unit**
 - **Funding Department** cannot be drilled down unless both **Funding Division** and **Funding Business Unit** are specified
 - **Fund, Program, Project Id, Staff Type, Empl Class, and Action Reason** can all be drilled down to the **Fiscal Year, Funding Business Unit, Funding Division, and/or Funding Department level**
 - i. These do not involve a hierarchy of steps like Funding Business Unit, Funding Business Unit, and Funding Business Unit do.

3. **Selection Type** is used to define a specific Parameter value

- **Roll Up** checkbox must be “unchecked” to enter a value

4. The **Roll Up** check box determines the level of detail the report returns

- Unchecked – Must define a specific value for that particular parameters
- Checked – All amounts within that parameters will be included in the results

5. **Description** gives long description of the **Selection Type**

6. Control buttons on the CAT Summary Page

- **Run** button is used to retrieve report results based on parameters entered
- **Clear Drill Down** button removes selected **Drill Down**
- **Reset All** button resets all Search Result criteria to their default values

7. **Search Save** provides the option to save any Search Criteria

- Saved searches are for information purposes only, and will not default any Search Criteria fields

Results Section & Output Value Overview

Based on input parameters, employee population included in Continuing Staff Base (CSB), Action Reasons included in CSB and Base Increase Percent by Action Reason, the results table lists totals for **CSB FTE**, **CSB Amount**, **Non-Merit Percent**, **Non-Merit Amount**, **Merit Percent**, **Merit Amount**, **Merit Percent of CSB**, and **Variance**. It is important for the user to understand where these output values come from, and what they do and do not include.

CAT Summary Page – Results Section

Results																		1	2	3	4	5	6	7	8	9
Fiscal Year	Funding BU	Funding Division	Funding Dept	Fund	Program	Project Id	Staff Type	Empl Class	Action Reason	CSB FTE	CSB Amount	Non-Merit Percent	Non-Merit Amount	Merit Percent	Merit % of CSB	Merit Amount	Variance									
										0.000000	\$0	0.000	\$0	0.000	\$0	\$0	\$0									

1. Parameters

- Description: Displays report parameters entered in the Search Criteria section.
 - Note: When **Roll Up** is selected in the **Search Criteria**, “ALL” will display when Roll Up is selected



2. CSB FTE

- Description: The **CSB FTE** is the sum of all **Budgeted FTE** for all employees who are included in the Continuing Staff Base.
- Example:
 - Employees who’s **Add Salary to Continuing Staff Base?** box “checked” are included in the **CSB FTE** total
 - Those employee’s **Budgeted FTE** are then added to the **CSB FTE** total

Input Value(s) – CAT Page

Compensation and Funding Data									
Effective Date:	07/01/2015		Planned FTE:	1.000000		Planned Title:	ADMIN PROGRAM SPEC		Automatic HRS Job Data Feed for this Empl Rcd: Active
Rate Calculation Type:	Cumulative (IPS v2)		Comp Rate:	70700.000000		Add Salary to Continuing Staff Base?: <input checked="" type="checkbox"/> A			
Funding Change									
GL Business Unit	Fund	Department	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount	Full Time Rate	Funding Edits Status
UWMSN	101	011050	1		100.000	1.000000	71,907.000	\$71,907.000000	SFS Edits Passed

Output Results – CAT Summary Page

Results												Personalize Find View All   First 1 of 1 Last			
Fiscal Year	Funding BU	Funding Division	Funding Dept	CSB FTE	CSB Amount	Non-Merit Percent	Non-Merit Amount	Merit Percent	Merit % of CSB	Merit Amount	Variance				
2016	UWMSN	A01	A011050	1.000000	\$71,200	0.000	\$500	1.000	\$712	\$707	\$5				

3. CSB Amount

- **Description:** The **CSB Amount** is the sum of employee base compensation plus compensation changes that are included in CSB.
 - **Formula:** $(\text{Comp Rate} + \text{Change Amount } (\$)) * \text{Budgeted FTE} = \text{CSB Amount}$
- **Example:**
 - First, only employees with the **Add Salary to Continuing Staff Base** checkbox “checked” will be included in the **CSB Amount** calculation.
 - Those Employees **Comp Rates** (annualized salary) will then be added to the **CSB Amount**.

Input Value(s) – CAT Page

Compensation and Funding Data			
Effective Date:	07/01/2015	Planned FTE:	1.000000
Rate Calculation Type:	Cumulative (IPS v2)	Comp Rate:	70700.000000
		Planned Title:	ADMIN PROGRAM SPEC
		Add Salary to Continuing Staff Base?:	<input checked="" type="checkbox"/>

- In addition, **Compensation Changes** are added based on whether the **Action Reasons** is indicated to be **Included in CSB** - this is defined on the *Annual Setup* page.

Input Value(s) – Annual Setup Page

Calculation Method and Continuing Staff Base by Reason			
*Reason Code	*Action Reason	*Rate Calculation Type	Include in CSB?
001	Change in Duties-Reclass	Flat Dollar Amount	<input checked="" type="checkbox"/>
019	Merit	Percentage	<input type="checkbox"/>

- The **Change Amount (\$)** for all **Action Reasons** marked to be **Included in CSB** will be added to the CSB Amount.

Input Value(s) – CAT Page

Compensation Change			
Action	Action Reason	Change Amount (\$)	Change Percent (%)
1 Pay Rate Change	019 - Merit	707.000000	1.000
2 Pay Rate Change	001 - Change in Duties-Reclass	500.000000	0.700

- Budgeted FTE** is then multiplied by the total amount (base salaries + comp changes).

Input Value(s) – CAT Page

Funding Change							
GL Business Unit	Fund	Department	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount
UWMSN	101	011050	1		100.000	1.000000	71,907.000

Output Results – CAT Summary Page

Results												Personalize Find View All First 1 of 1 Last
Fiscal Year	Funding BU	Funding Division	Funding Dept	CSB FTE	CSB Amount	Non-Merit Percent	Non-Merit Amount	Merit Percent	Merit % of CSB	Merit Amount	Variance	
2016	UWMSN	A01	A011050	1.000000	\$71,200	0.000	\$500	1.000	\$712	\$707	\$5	

4. Non-Merit Percent

- Description: The **Non-Merit Percent** is a fixed percent defined by each *Funding Business Unit* for non-merit compensation increases.
 - Note: **Non-Merit Percent** will only display when *Employee Class* and *Action Reason* input parameters are specified or the *Action Reason* “Drill Down” is selected
- Example:

Input Value(s) – Annual Setup Page

Base Increase Percent by Empl Class and Reason					Personalize Find View All First 1-2 of 2 Last
*Empl Class	*Reason Code	*Action Reason	Base Increase Percent		
1 ALL	001	Change in Duties-Reclass	5.000		
2 ALL	019	Merit	1.000		

Output Results – CAT Summary Page

Results												Personalize Find View All First 1 of 1 Last
Fiscal Year	Funding BU	Funding Division	Funding Dept	Action Reason	CSB FTE	CSB Amount	Non-Merit Percent	Non-Merit Amount	Merit Percent	Merit % of CSB	Merit Amount	Variance
2016	UWMSN	A01	A011050	001	1.000000	\$71,200	5.000	\$500	0.000	\$0	\$0	\$0

5. Non-Merit Amount

- Description: **Non-Merit Amount** is the sum of all non-merit compensation **Change Amounts (\$)** entered on the **CAT Page**.
- Example:

Input Value(s) – CAT Page

Compensation Change							Personalize Find View All First 1-2 of 2 Last
Action	Action Reason	Change Amount (\$)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE		
1 Pay Rate Change	019 - Merit	707.000000	1.000	\$71,407.000000	\$71,407.000		
2 Pay Rate Change	001 - Change in Duties-Reclass	500.000000	0.700	\$71,907.000000	\$71,907.000		

Output Results – CAT Summary Page

Results												Personalize Find View All First 1 of 1 Last
Fiscal Year	Funding BU	Funding Division	Funding Dept	Action Reason	CSB FTE	CSB Amount	Non-Merit Percent	Non-Merit Amount	Merit Percent	Merit % of CSB	Merit Amount	Variance
2016	UWMSN	A01	A011050	001	1.000000	\$71,200	5.000	\$500	0.000	\$0	\$0	\$0

6. Merit Percent

- Description: The **Merit Percent** is a fixed percent defined by each *Funding Business Unit* for merit compensation increases.
- Example:

Input Value(s) – Annual Setup Page

Base Increase Percent by Empl Class and Reason						Personalize Find View All First 1-2 of 2 Last
	*Empl Class	*Reason Code	*Action Reason		Base Increase Percent	
1	ALL	001	Change in Duties-Reclass		5.000	+ -
2	ALL	019	Merit		1.000	+ -

Output Results – CAT Summary Page

Results							Personalize Find View All First 1 of 1 Last				
<u>Fiscal Year</u>	<u>Funding BU</u>	<u>Funding Division</u>	<u>Funding Dept</u>	<u>CSB FTE</u>	<u>CSB Amount</u>	<u>Non-Merit Percent</u>	<u>Non-Merit Amount</u>	<u>Merit Percent</u>	<u>Merit % of CSB</u>	<u>Merit Amount</u>	<u>Variance</u>
2016	UWMSN	A01	A011050	1.000000	\$71,200	0.000	\$500	1.000	\$712	\$707	\$5

7. Merit % of CSB

- Description: **Merit % of CSB** represents the **CSB Amount** multiplied by the **Merit Percent**.
- Formula: $CSB\ Amount * Merit\ Percent = Merit\ \%\ of\ CSB$
- Example:

Output Results – CAT Summary Page

Results							Personalize Find View All First 1 of 1 Last				
Fiscal Year	Funding BU	Funding Division	Funding Dept	CSB FTE	CSB Amount	Non-Merit Percent	Non-Merit Amount	Merit Percent	Merit % of CSB	Merit Amount	Variance
2016	UWMSN	A01	A011050	1.000000	\$71,200	0.000	\$500	1.000	\$712	\$707	\$5

8. Merit Amount

- Description: The **Merit Amount** represents the sum of all employee's merit compensation **Change Amounts (\$)** defined on the **CAT Page**.
- Example:

Input Value(s) – CAT Page

Compensation Change						Personalize Find View All	First	1-2 of 2	Last
Action	Action Reason	Change Amount (\$)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE				
1 Pay Rate Change	019 - Merit	707.000000	1.000	\$71,407.000000	\$71,407.000				
2 Pay Rate Change	001 - Change in Duties-Reclass	500.000000	0.700	\$71,907.000000	\$71,907.000				

Output Results – CAT Summary Page

Results												Personalize Find View All	First	1 of 1	Last
Fiscal Year	Funding BU	Funding Division	Funding Dept	CSB FTE	CSB Amount	Non-Merit Percent	Non-Merit Amount	Merit Percent	Merit % of CSB	Merit Amount	Variance				
2016	UWMSN	A01	A011050	1.000000	\$71,200	0.000	\$500	1.000	\$712	\$707	\$5				

9. Variance

- **Description:** Calculated by subtracts the **Merit % of CSB** from **Merit Amount** to identify fund **Variance**.
 - **Positive** amount represents *remaining available money* for merit increases
 - **Negative** amount represents *amount over allotted Merit Percent*
- **Formula:** Merit % of CSB – Merit Amount = Variance

Output Results – CAT Summary Page

Results												Personalize Find View All	First	1 of 1	Last
Fiscal Year	Funding BU	Funding Division	Funding Dept	CSB FTE	CSB Amount	Non-Merit Percent	Non-Merit Amount	Merit Percent	Merit % of CSB	Merit Amount	Variance				
2016	UWMSN	A01	A011050	1.000000	\$71,200	0.000	\$500	1.000	\$712	\$707	\$5				

Procedure Steps

1. Navigate to *Main Menu > Workforce Administration > UW External HR Systems > Compensation Admin Tool > Summary Reporting Page*.
2. Enter desired **Fiscal Year**
 - This field will default to the latest fiscal year setup in the CAT

Search Criteria	
Parameters	Drill Down
Selection Type	Roll Up
*Fiscal Year	2017

Run

3. Click the **Run** button
4. Review the **Results**
 - Results return one string of information for the defined Fiscal Year

Results										Personalize Find View All 1 of 1 Last							
Fiscal Year	Funding BU	Funding Division	Funding Dept	Fund	Program	Project Id	Staff Type	Empl Class	Action Reason	CSB FTE	CSB Amount	Non-Merit Percent	Non-Merit Amount	Merit Percent	Merit % of CSB	Merit Amount	Variance
2017	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	14630.965235	\$1,006,033,780	0.000	\$32,520	0.000	\$0	\$350,204	\$0

- Next, select the **Drill Down** radio button next to **Funding Business Unit**

Search Criteria

Parameters

Drill Down

Selection Type

Roll Up

*Fiscal Year

2017

Funding Business Unit

Run

- Click the **Run** button
- Review the **Results**, which will return a totals row for each **Funding Business Unit**
 - Note: Funding Business Units returned may be limited based on security permissions

Results										Personalize Find View All First 1-10 of 10 Last								
Fiscal Year	Funding BU	Funding Division	Funding Dept	Fund	Program	Project Id	Staff Type	Empl Class	Action Reason	CSB FTE	CSB Amount	Non-Merit Percent	Non-Merit Amount	Merit Percent	Merit % of CSB	Merit Amount	Variance	Drill Down
TOTAL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	14630.965235	\$1,006,033,779	0.000	\$32,520	0.000	\$0	\$350,203	\$0	Drill Down
2017	UWCOL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	1.000000	\$29,937	0.000	\$0	0.000	\$0	\$297	\$0	Drill Down
2017	UWEXT	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	1.200000	\$121,512	0.000	\$0	0.000	\$0	\$0	\$0	Drill Down
2017	UWGBY	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	619.470500	\$33,128,376	0.000	\$0	0.000	\$0	\$328,342	\$0	Drill Down
2017	UWLAC	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	1.000000	\$80,000	0.000	\$0	0.000	\$0	\$0	\$0	Drill Down
2017	UWMIL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	0.500000	\$17,500	0.000	\$0	0.000	\$0	\$0	\$0	Drill Down
2017	UWMSN	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	14003.464735	\$972,424,074	0.000	\$32,520	1.000	\$9,724,241	\$16,364	\$9,707,877	Drill Down
2017	UWPLT	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	2.330000	\$113,940	0.000	\$0	0.000	\$0	\$0	\$0	Drill Down
2017	UWSUP	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	1.000000	\$42,440	0.000	\$0	0.000	\$0	\$5,200	\$0	Drill Down
2017	UWSYS	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	1.000000	\$76,000	0.000	\$0	0.000	\$0	\$0	\$0	Drill Down

- Select one of the yellow **Drill Down** button on the right-hand side of the **Results** to view **Funding Division** totals for a particular **Funding Business Unit**
 - The following should occur in the "Search Criteria"
 - Funding Business Unit** auto-populates
 - "Uncheck" corresponding **Roll Up** box
 - Drill Down** button selected for Funding Division

Search Criteria

Parameters

Drill Down

Selection Type

Roll Up

Description

*Fiscal Year

2017

Funding Business Unit

UWMSN

Funding Division

Funding Department

Run

9. Click the **Run** button
10. Review the **Results** which will return a totals row for each **Funding Division** within the **Funding Business Unit**

Results																		Personalize Find View All				First 1-20 of 37	
Fiscal Year	Funding BU	Funding Division	Funding Dept	Fund	Program	ProjectId	Staff Type	Empl Class	Action Reason	CSB FTE	CSB Amount	Non-Merit Percent	Non-Merit Amount	Merit Percent	Merit % of CSB	Merit Amount	Variance	Drill Down					
TOTAL	UWMSN	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	14003.464735	\$972,424,076	0.000	\$32,520	1.000	\$9,724,241	\$16,365	\$9,707,876	Drill Down					
2017	UWMSN	A01	ALL	ALL	ALL	ALL	ALL	ALL	ALL	38.680000	\$3,811,001	0.000	\$7,700	1.000	\$38,110	\$1,000	\$37,110	Drill Down					
2017	UWMSN	A02	ALL	ALL	ALL	ALL	ALL	ALL	ALL	367.097400	\$26,657,607	0.000	\$0	1.000	\$266,576	\$1,151	\$265,425	Drill Down					
2017	UWMSN	A03	ALL	ALL	ALL	ALL	ALL	ALL	ALL	106.075000	\$5,981,171	0.000	\$0	1.000	\$59,812	\$0	\$59,812	Drill Down					
2017	UWMSN	A04	ALL	ALL	ALL	ALL	ALL	ALL	ALL	77.660000	\$4,242,515	0.000	\$0	1.000	\$42,425	\$0	\$42,425	Drill Down					

Drill Down

11. Select one of the yellow **Drill Down** button on the right-hand side of the **Results** to view **Funding Department** totals within a particular **Funding Division**
 - The following should occur in the “Search Criteria”
 - i. **Funding Division** auto-populates
 - ii. “Uncheck” corresponding **Roll Up** box
 - iii. **Drill Down** button selected for Funding Department

Search Criteria				
Parameters	Drill Down	Selection Type	Roll Up	Description
*Fiscal Year		2017		
Funding Business Unit	<input type="radio"/>	UWMSN	<input type="checkbox"/>	UW Madison
Funding Division	<input type="radio"/>	A02	<input type="checkbox"/>	DIV-GENERAL SERVICES
Funding Department	<input checked="" type="radio"/>		<input checked="" type="checkbox"/>	
Fund	<input type="radio"/>		<input checked="" type="checkbox"/>	

Run

12. Click the **Run** button
13. Review the **Results**
 - **Results** section will show all **sub-departments** on individual strings.
 - Note that **Funding Business Unit**, **Funding Division**, and **Funding Department** function in a hierarchy in which the user must specify the parameters in order as they move from unit to department.

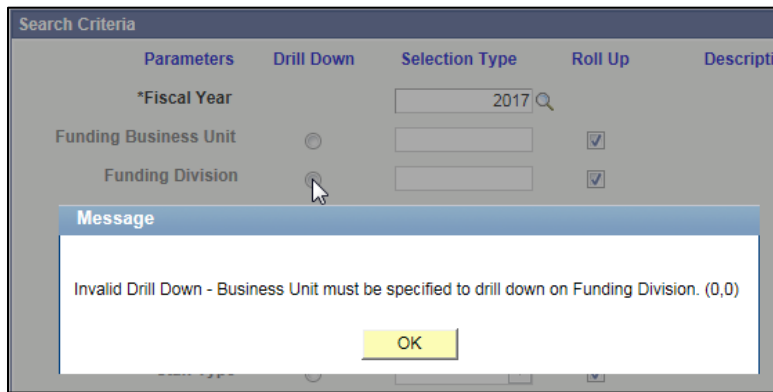
Results																		Personalize Find View All				First	1-12 of 12	Last
Fiscal Year	Funding BU	Funding Division	Funding Dept	Fund	Program	Project Id	Staff Type	Empl Class	Action Reason	CSB FTE	CSB Amount	Non-Merit Percent	Non-Merit Amount	Merit Percent	Merit % of CSB	Merit Amount	Variance	Drill Down						
TOTAL	UWMSN	A02	ALL	ALL	ALL	ALL	ALL	ALL	ALL	367.097400	\$26,657,607	0.000	\$0	1.000	\$266,576	\$1,151	\$265,425	Drill Down						
2017	UWMSN	A02	A0205	ALL	ALL	ALL	ALL	ALL	ALL	60.707400	\$3,749,031	0.000	\$0	1.000	\$37,490	\$1,151	\$36,339	Drill Down						
2017	UWMSN	A02	A0206	ALL	ALL	ALL	ALL	ALL	ALL	31.300000	\$1,730,445	0.000	\$0	1.000	\$17,304	\$0	\$17,304	Drill Down						
2017	UWMSN	A02	A0208	ALL	ALL	ALL	ALL	ALL	ALL	43.650000	\$3,753,472	0.000	\$0	1.000	\$37,535	\$0	\$37,535	Drill Down						
2017	UWMSN	A02	A0220	ALL	ALL	ALL	ALL	ALL	ALL	63.950000	\$4,034,926	0.000	\$0	1.000	\$40,349	\$0	\$40,349	Drill Down						

14. Click the **Reset All** button

Reset All

15. Click the **Drill Down** button for the empty **Funding Division** field.

- Notice that this will prompt an error message. Fiscal Year, Funding Business Unit, Funding Department, and Funding Division involve a hierarchy that must be filled in in order. Therefore, the user cannot drill down to Funding Division without first defining Funding Business Unit.



Tables

CAT Summary Page

Table 1: Search Criteria

Column	Description
Parameters	The optional fields for searching. Only Fiscal Year is required. Funding Business Unit, Funding Division, and Funding Department have to be searched together as the user moves down.
Drill Down	The parameter for which the results will organize each option as its own string.
Selection Type	The editable fields to set up the search. The user can either specify a particular parameter or Roll Up all possibilities into the search.
Roll Up	The option to include all items for that particular parameter in the search.
Description	The full expression for the abbreviated selection type specified.
Field Name	Description
*Fiscal Year	The desired year to search by. Required.
Funding Business Unit	The specific UW Institution.
Funding Division	The desired Funding Division within the Funding Business Unit.
Funding Department	The desired Funding Department within the Funding Division and Funding Business Unit.
Fund	The specific UW Fund codes.
Program	The specific UW Program codes.
Project Id	The specific UW Project Id.
Staff Type	The specific UW Staff Type. Given as a drop-down menu.
Employee Class	The specific class of employee.
Action Reason	The reason for the given compensation change.

Buttons	Description
Drill Down	Organizes each individual item in the given parameter by its own string.
Search Tool	Opens the search box for the user to find a specific item for the parameter.
Roll Up	Includes all items in the given parameter in the search.
Run	Runs the search. Results displayed in the Results box.
Clear Drill Down	Clears any Drill Down button selected in the Search Criteria section.
Reset All	Returns all fields to their default: Fiscal Year as 2018, all empty parameters set to Roll Up, no parameters set to Drill Down.

Table 2: Results

Column	Description
Fiscal Year	The specified year from the Search Criteria section.
Funding BU	ALL/specified Funding Business Unit(s) from the Search Criteria section.
Funding Division	ALL/specified Funding Division(s) from the Search Criteria section.
Funding Dept	ALL/specified Funding Department(s) from the Search Criteria section.
Fund	ALL/specified UW Fund code(s) from the Search Criteria section.
Program	ALL/specified UW Program code(s) from the Search Criteria section.
Project Id	ALL/specified UW Project Id(s) from the Search Criteria section.
Staff Type	ALL/specified UW Staff Type(s) from the Search Criteria section.
Empl Class	ALL/specified UW Employee Class(es) from the Search Criteria section.
Action Reason	ALL/specified reason(s) for given compensation change from the Search Criteria section.
CSB FTE	This column will displays sum of the FTE for <u>ONLY employees identified as being in the Continuing Staff Base</u>
CSB Amount	Displays sum for all <u>employees identified as being in the Continuing Staff Base</u>
Non-Merit Percent	Displays all other compensation increases (excluding Merit 019) for <u>ONLY employees identified as being in the Continuing Staff Base</u>
Non-Merit Amount	Non-Merit % will only display when Employee Class and Action Reason input parameters are specified or Action Reason is set to "Drill Down"
Merit Percent	Displays Merit compensation increase % (Merit 019) for <u>ONLY employees identified as being in the Continuing Staff Base</u>
Merit Amount	Displays all Merit compensation increases (Merit 019) for <u>ONLY employees identified as being in the Continuing Staff Base</u>
Merit % of CSB	Calculate by Merit % x CSB
Variance	Calculated by: Merit % of Base - Merit
Buttons	Description
Personalize	Allows the user to reorder, hide, or freeze columns in the Results section.
Find	Allows the user to search for keywords within the Results section.
View All	Defaults to inaccessible unless the user uses the Personalize or Find buttons. View All returns the Results section to all results. It will then give change to View 20, which if clicked, will return to the inaccessible View All.
Zoom - Results	Prompts a pop-up window of just the results box.
Download	Allows the user to download the Results section.

First	Navigates to the first page of results.
Last	Navigates to the last page of results.
[Any Column Header]	Organizes the Results section by the chosen field.