**Use the CAT Summary Reporting Page**

|  |  |
| --- | --- |
| Step | Action |
| Navigation: Main Menu > Workforce Administration > UW External HR Systems > Compensation Admin Tool > Summary Reporting Page | |
| 1 | The Summary Reporting Page allows the user to view Merit totals based on different combinations of selected parameters. This user guide will show some examples of using the tool. |
| 2 | Use the **search tool** to select the desired information for **Fiscal Year**. (The page may default to the user’s Business Unit too.) Click the **Run** button. This will display the totals including all parameters "rolled up" in the selected Fiscal Year (and Business Unit, if applicable). |
| 3 | Click the **Drill Down** radio button for **Funding Division**. Note that the **Roll Up** box for Funding Division stays checked. Click the **Run** button. This will display the totals for each Funding Division in the tester's specific Business Funding Unit. |
| 4 | Uncheck the **Roll Up** box for **Funding Division**. Use the **search tool** to enter desired **Funding Division**. Click the **Drill Down** radio button for **Funding Department**. Note the **Roll Up** box for **Funding Department** stays checked. Click the **Run** button. This will display the totals for each Funding Department in the tester's specific Business Funding Unit and Funding Division. |
| 5 | Uncheck the **Roll Up** box for Funding Department. Use the search tool to enter desired **Funding Department**. Keep the **Drill Down** radio button clicked for **Fund**. Click the **Run** button. This will display the totals for each Funding Department in the tester's specific Business Funding Unit and Funding Division. |
| 6 | Note that some departments may display **multiple Funding Departments** strings. If applicable, click the **Drill Down** button at the far right of the Results section for a given string. This will auto-populate the search criteria for that specific sub-department and deselects the corresponding Drill Down button. |
| 7 | Note that one must specify a **Funding Business Unit** to select a **Funding Division**, and both a **Funding Business Unit** and **Funding Division** to select a **Funding Department**. Failure to specify necessary fields will result in an error message when the Run button is clicked. |
| 8 | Click the **Clear Drill Down** button in the Search Criteria Box. Enter information for  Funding Business Unit, **OR** Funding Business Unit and Funding Division, **OR** Funding Business Unit and Funding Division and Funding Department. Click the **Run** button. This will display the totals for all unspecified, rolled up parameters for the specified parameters, not drilled down to any particular parameter. |
| 9 | Click the **Reset All** button. This clears all parameters except for the default Fiscal Year and Business Unit. Click the **Drill Down** radio button for **Empl Class**. Click the **Run** button. This will display the totals for all unspecified, rolled up parameters for each individual Empl Class string. |
| 10 | Click the **Reset All** button. This clears all parameters except for the default Fiscal Year and Business Unit. Uncheck the **Roll Up** box for **Funding Business Unit**. Use the **search tool** to select desired **Funding Business Unit**. Press the **Drill Down** radio button for **Fund**, **Program**, **Project Id**, **Staff Type**, **Empl Class**, or **Action Reason**. Click the **Run** button. This will display the totals for all unspecified, rolled up parameters within the specified Funding Business Unit drilled down to the chosen parameter. |
| 11 | Try some different combinations for Drill Down and Roll Up. If it is in invalid action, you will see an error message. |