

UNIVERSITY OF WISCONSIN – MADISON
MADISON BUDGET OFFICE
175 BASCOM HALL

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>, 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 our URL, <http://www.mbo.wisc.edu/>, bottom lower left corner. **PLEASE NOTE: This step has already been done for the majority of the budget personnel requiring access to the web-based Planning Allocation and the Allocated vs Budgeted Reports. A list of authorized staff will be issued for your review at the start of each annual budget exercise.**

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 to go directly to the MBO home page using URL <http://www.mbo.wisc.edu/> and then click on the Planning Allocation Reports option located in the upper right corner.

The following screen will appear.

Logon for Planning Allocation

UNIVERSITY OF WISCONSIN SYSTEM
UW

**Welcome to the
UWSA Planning Allocation System**

Please Log On

Logon ID:

Password:

Database: Test

Connect Cancel

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.

Window

PLANNING ALLOCATION SYSTEM

UNIVERSITY OF WISCONSIN SYSTEM
UW

**Welcome to the UWSA
Planning Allocation System**

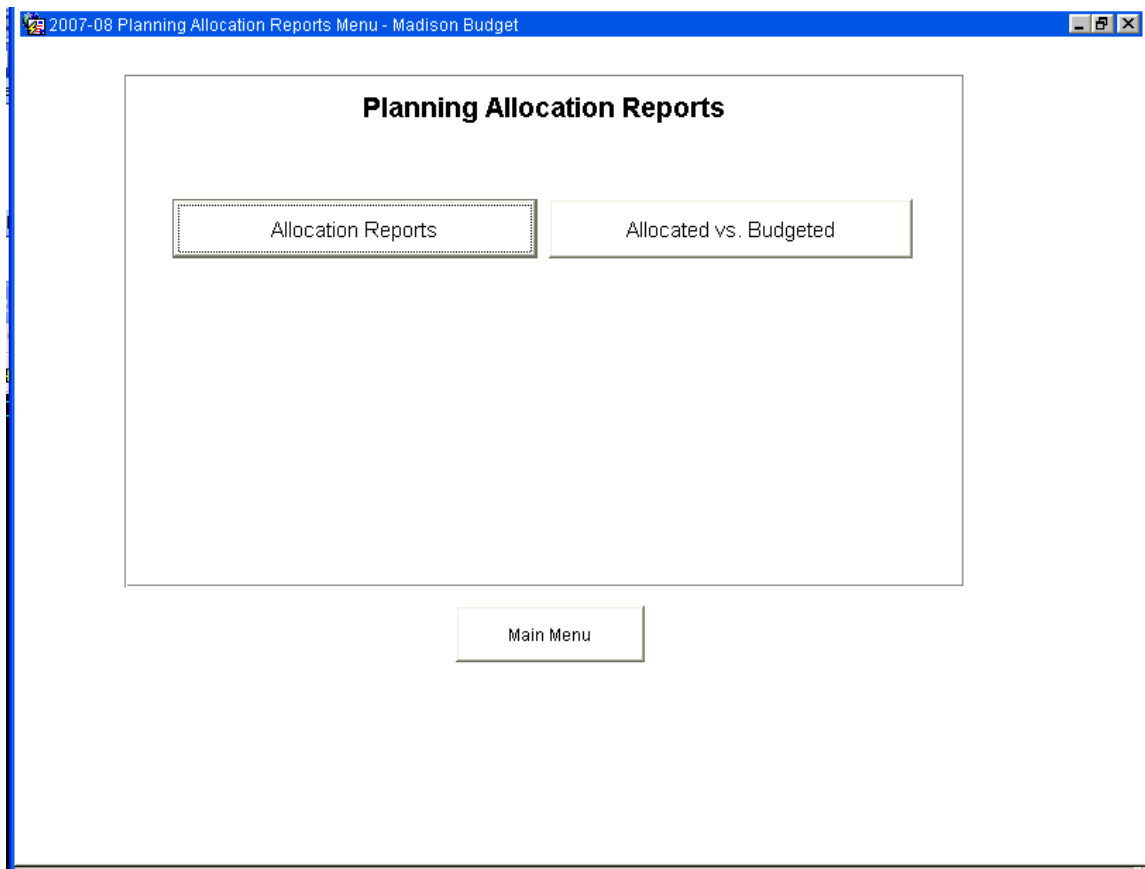
Planning Allocation for Fiscal Year

Select the Desired Transaction:

Reference Number Inquiry	Reference Number Update
Single Allocation Inquiry	Single Allocation Update
Multiple Allocation Inquiry	Multiple Allocation Update
Allocation Summary (PADS)	Reference Number Conversion
Table Maintenance	Reports

Logoff

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.

Madison Allocation Report

Fiscal Year: 2008 Budget Unit:

Fund Group: ALL Report Level: Budget Unit

OR (cannot choose both fund group and fund)

Fund: ALL Sort Order: By Reference Number

Output Type: PDF - View/Print/Save

Reports Menu Create Report

Record: 1/1

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

1. Fill in the Budget Unit., (A0208, A07)
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. (The Madison campus Budget Office is in charge of assigning the UDDS to the proper Logon ID. Any questions or concerns should be directed to Helen Schouten at hschouten@vc.wisc.edu or 3-4708).

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.) The first page of the report will be the header page followed by the actual allocation report. Sample below reflects a unit with only one reference number.

ORG: A0130 - PROFESSIONAL DEVELOPMENT AWARDS

REF. NO.	DESCRIPTION	PROGRAM/FTE	FUND 101	S&W	FRINGES	NON S&W	UNKNOWN	TOTAL
001.001	2006-07 PRINTED BUDGET BASE	1 Institutional Support	\$20,000					
		ITEM TOTAL	\$20,000			\$20,000		\$20,000
<hr/>								
		PROGRAM/FTE	FUND 101	S&W	FRINGES	NON S&W	UNKNOWN	TOTAL
FUND 101 TOTALS								
DOCTORAL UNIVERSITIES								
		1 Institutional Support	\$20,000					
		FUND TOTAL	\$20,000			\$20,000		\$20,000

STEP SIX. Closing the Budget Planning Allocation Report will get you back to the Madison Allocation Report Screen. From this screen select “Reports Menu” to return to the Planning Allocation Reports Screen.

STEP SEVEN The Allocated vs. Budgeted report can be selected from this screen. (“Allocated vs. Budgeted” is currently referred to as the “PADS” report)

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

Planning Allocation System

Window

2007-08 Allocation vs. Budgeted Reports Request - Madison Budget

Dollars/FTEs Allocated vs. Dollars Budgeted Report

Fiscal Year: 2008

Budget Unit: []

Fund Group: ALL

Report Level: Campus

OR (cannot choose both fund group and fund)

Fund: ALL

Output Type: PDF - View/Print/Save

Reports Menu

Create Report

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.

2007-08 Budget Planning Allocations
University Of Wisconsin - Madison
Comparison of Planning Allocations vs Budget Requests

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Fund		Group	Budget Allocation	Budget Request	Variance
101		GPR			
PROGRAM					
	1	Institutional Support	20,000	20,000	0
Total Program:			20,000	20,000	0
MAJOR CLASS					
		Non-S&W	20,000	20,000	0
Total Major Class:			20,000	20,000	0