6.18 – Live CAT View in Planning Allocation

Overview
To assist divisions with real time review of CAT and AAP budget and FTE data, a view has been developed inside of the Planning Allocation application titled “Live CAT View”. This view will display CAT and APP data based on selected criteria (see below for further information).

Accessing the Live CAT View
The Live CAT View is located inside of the Planning Allocation system. Once logged into the application you should click on the “Live CAT View” tile.
After clicking on the Live CAT View tile the following screen should appear:

In the “Query by Budget Unit, Fund, Fund Group” section you can select your desired criteria for retrieval of CAT and AAP data. You can base your selection on the following parameters:

- **Unit**: This allows you to select a Division, Department, or DepartmentID. You must use “A” in front of your selection (Axx, Axxxx, Axxxxxx)
- **Fiscal Yr**: This is default to 2020, there should not be a need to change but you can adjust.
- **Fund**: Select the fund you want to see, leaving this blank will bring in all funds
- **Fund Grp**: Drop down selection of specific fund groupings. Leaving this blank will revert to the selectin you made for Fund.
- **Project**: Select the project you want to see, leaving this blank will bring in all project and non-project data
- **Program**: Select the program, you want to see, leaving this blank will bring in all project and non-project data.

In the below example we’re using department A0205 in the “Unit” section and fund 101 in the “Fund” section. One you have made your selections click the “Retrieve” button in the upper right hand section.
of the view. Results will then display if there are CAT or APP entries associated with the criteria you have selected.

The results will be displayed in the “CURRENT LIVE FEED BUDGETED FTE AND DOLLAR AMOUNTS FOR” section of the view:
The screen has been setup to print by clicking on the “Print” section.

If you have any questions please reach out to your budget analyst or send an email to planuw-msnmbo@vc.wisc.edu.