2018-19
Office of Planning and Budgets
Budget Planning and Analysis
Base Budget Reconciliation
Salary and Wage Allocations
Steps to Open Planning Analytics for Training

Open Applications After Overview is Presented

1. VPN using CampusAd Realm
2. Login using URL for the Planning Analytics TEST site: http://adstst200g1.campusad.msu.edu:9510/pmpsvc
3. Enter password: gw$UGFNV and last 4 digits of ZPID
Overview

- Resources Guides
- Security Groups
- Application Location and Web Browsers
- Application Overview
- Cubes and Web Sheets
- Mentions
Resource Guide

The resource guides for Base Budget Reconciliation (BBR) and Salary and Wage Allocations (SWA) are available on the Budget Planning and Analysis web page

https://opb.msu.edu/functions/budget/cognos.html

Will also serve as the landing page for any/all pertinent information
Security Groups

BBR and SWA applications share the same security role.

Security roles are by organization and application.

PA / **MAU or Organization** / SUBMIT or VIEW.
PA / **Application** / SUBMIT or VIEW.

Example of security groups (*only MAU level)*:
/group/EBS/PA/10002000-SUBMIT or VIEW
/group/EBS/PA/BR-SUBMIT or VIEW
Path to Application

Enter the URL for the **Planning Analytics** site:

https://pal.itservices.msu.edu/pmpsvc/

or log in through the EBS website (ebs.msu.edu) and click on the “Planning & Budgets” tile

**REMEMBER** – Take Ownership to Enter Data and Save Often

Prefers Chrome, Edge, Firefox browsers

IE compatible with some adjustments
Base Budget Reconciliation
Model Flow

Budget Allocation (Prior Year)

Provost Markets and Promotions

SRI (Separately Reviewed Items)

Base Budget Reconciliation

Budget Allocation

Salary and Wage Allocation

MAU Fiscal Officers are able to audit and adjust data in these two screens.

Contact OPB to enter “Transfers” between MAUs.
Salary and Wage Allocations
Model Flow

Revisions are entered in the SWA-Revision Request tab. These updates are shown on SWA-Salary and Wage Allocations by selecting “with Adjustment”.

Includes salary increases, annualized amounts, and operating supplies and services increment.

Includes data on Transfers, Provost Markets and Promotions.
Salary and Wage Allocation Increments

<table>
<thead>
<tr>
<th>Employee Group</th>
<th>Increment Factor</th>
<th>Annualized Budget Factor</th>
<th>Percent Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>FACULTY</td>
<td>0.8333</td>
<td>0.1667</td>
<td>2.50%</td>
</tr>
<tr>
<td>ACADEMIC STAFF</td>
<td>0.8333</td>
<td>0.1667</td>
<td>2.50%</td>
</tr>
<tr>
<td>GRAD</td>
<td>1.0000</td>
<td>0.0000</td>
<td>2.00%</td>
</tr>
<tr>
<td>PROFESSIONAL</td>
<td>0.7500</td>
<td>0.2500</td>
<td>0.00%</td>
</tr>
<tr>
<td>CLERICAL TECHNICAL</td>
<td>0.2500</td>
<td>0.7500</td>
<td>2.00%</td>
</tr>
<tr>
<td>FOP</td>
<td>1.0000</td>
<td>0.0000</td>
<td>2.00%</td>
</tr>
<tr>
<td>LABOR</td>
<td>1.0000</td>
<td>0.0000</td>
<td>2.00%</td>
</tr>
<tr>
<td>REGULAR LABOR</td>
<td>1.0000</td>
<td>0.0000</td>
<td>0.00%</td>
</tr>
<tr>
<td>STUDENT LABOR</td>
<td>1.0000</td>
<td>0.0000</td>
<td>4.00%</td>
</tr>
<tr>
<td>CONTINGENCY</td>
<td>0.0000</td>
<td>1.0000</td>
<td>0.00%</td>
</tr>
<tr>
<td>OPERATING SS</td>
<td>1.0000</td>
<td>0.0000</td>
<td>2.00%</td>
</tr>
</tbody>
</table>
Action Menu

- **Action Menu** ( ) for print selection and reset views
- **Commit** ( ) save data (about 30 minutes until times out)
- **Take Ownership** ( ) activates ability to insert data
- **Submit** ( ) approval and lock application
- **Autofit** ( ) adjust column width
Base Budget Reconciliation Tabs

- **BBR Letter MAU**: Base Budget Reconciliation Letter by fiscal year
- **BBR-MAU**: Web sheet view of BBR. Also includes a link to Salary and Wage Application (SWA).
- **BBR-Provost Mkt and Promotion**: Listing of recurring funds that also links to SWA.
- **BBR SRI Input**: Summary of Separately Reviewed Items
- **BBR MAU Default**: Cube view of BBR data
BBR Steps

1. Review Base Budget Reconciliation (BBR Letter MAU or BBR-MAU).


3. Contact Office of Planning and Budget for Transfer allocation entries between MAUs.


5. Submit ( )BBR application by June 1.
BBR Steps

1. Review BBR data
2. Insert Provost Market and Promotion revisions
3. Contact OPB on Transfers
4. Select link and review SWA
5. Submit (      ) by June 1.
Provost Market and Promotion Allocations

- Enter adjustments to Provost Market and Promotions
- Provides history back to 2012-13
- Data linked to Salary and Wage Allocation
SWA Steps

1. Base Budget Reconciliation revisions link into Salary and Wage Allocations application.

2. Select Salary and Wage Allocation application if making nonrecurring adjustments.

3. Update changes to non recurring adjustments and annualized entries in SWA-Revision Request tab.

4. Submit SWA application by June 1.
SWA Steps

1. Select Salary and Wage Allocation application to revise nonrecurring amounts.
2. Enter nonrecurring adjustments within SWA-Revision Request tab.
3. Submit (  ) by June 1.
SWA Steps

1. Open Salary and Wage Allocation application to revise nonrecurring amounts.
2. Enter nonrecurring adjustments within SWA-Revision Request tab.
3. It is required to complete the Salary & Wage Alloc Category, Employee Group, Amount, Explanation, Revised by, and Revision Date columns.
4. Revisions to non-recurring adjustments must net to zero.
Web Sheets and Cubes

Tabs showing icons that look like a spreadsheet (      ) are web sheets containing selection fields.

Those that display icons that look like a cube (      ) are dimensional which can be changed to show different data in grid.
Steps to Print

1. Select Action Menu Icon (upert) 
2. Right Click and Select Export 
3. Select Snapshot to Excel 
4. Click on OK 
5. Select Open 
6. Format sheet and print
Mentions

- No validation rules but rather conditional formatting.
- Data links directly between applications.
- Contains historical data beginning with 2012-13.
- Take Ownership (ласт) once the application is open to enter data.
- Release Ownership by going to index screen and clicking on this icon (пользователь).
- Make revisions and submit BBR and SWA by June 1.
- Save frequently, about half an hour expiration.
For Planning Analytics Questions, Contact

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PLEASE

Do Not Revise Data in TEST Environment

After Training