This application displays dean expense splits between instructional and academic administration for reporting in HEIDI.

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Chapter 1: Introduction

The Planning Analytics (PA) HEIDI Dean Expense Split model is used by Office of Planning and Budgets (OPB) to separate dean expenditures into instructional and academic administration categories, which is used in the HEIDI annual reporting.

INSTRUCTIONAL EXPENDITURES

This category should include expenditures for all activities that are part of an institution’s instruction program. Expenditures for credit courses for academic, vocational and technical instruction, for remedial and tutorial instruction, and for regular, special and extension sessions should be included. Expenditures for departmental research and public service that are not separately budgeted should be included in this classification. This category excludes expenditures for academic administration when the primary assignment is administration – for example, academic deans. However, expenditures for department chairpersons are included in this category.

ACADEMIC ADMINISTRATION EXPENDITURES

This category includes expenditures for activities specifically designed and carried out to provide administrative and management support to the academic programs. This subcategory is intended to separately identify only expenditures for activities formally organized and/or separately budgeted for academic administration. It includes the expenditures of academic deans [including deans of research, deans of graduate schools, and college deans], but does not include the expenditures of department chairpersons [which are included in the appropriate instructional categories]. It also includes expenditures for formally organized and/or separately budgeted academic advising.
Chapter 2: Security Groups

Security Roles
Access to this application is determined through security roles granted by Security Contacts within D6501 or through an Access Request Memo (ARM) form. Workflow screens will be different depending on the security role assigned for each application.

- Planning Analytics **Viewer** – users get “view only” rights in system.
- Planning Analytics **Submitter** – users may view, edit and save changes, as well as commit data for their organization(s) for central approval. This role is appropriate for MAU fiscal officers, deans or administrators, as identified by MAU.

Security Groups in D6501
Planning Analytics security groups’ management decentralized for MAU’s to input directly within D6501.

- The following is the path to the ARM form for requesting access to the application in Cognos Planning Analytics: http://aissecuritycontact.ais.msu.edu/arms/index-ebs.html
  - At the bottom of this screen, you will find Planning Analytics section.
  - Select the PDF link in the last column: EBSUnitCognosEPRoles.pdf *(Planning Analytics access using same ARM form as used for Cognos EP).*
- Contact the Help Desk (ithelp@msu.edu) with questions about completing ARM forms.
- Contact Denice Beckwith (beckwi37@msu.edu or call 353-0864) or Val Noel (thebeau@msu.edu or call 432-0219) or Bill Buddle (buddlewi@msu.edu or call 432-5319) with questions on security roles.

Security roles for Planning Analytics are by organization and application. The following is the format for security groups in D6501:

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

Example of security groups for Base Budget Reconciliation *(only MAU level)*:

- /group/EBS/PA/10002000-SUBMIT
- /group/EBS/PA/10002000-VIEW
- /group/EBS/PA/HEIDI-SUBMIT
- /group/EBS/PA/HEIDI-VIEW

There are a number of security groups in D6501 for Planning Analytics. **Using a filter within the “Title” field will help to show a listing of groups for your MAU. Example of filter: %PA/10002% or “%PA/HEIDI%.”**
Chapter 3: Steps to Open Application

1. Enter URL for the Planning Analytics site: https://pal.itservices.msu.edu/pmpsvc/ or log in through the EBS portal (ebs.msu.edu) and click on the “Planning and Budgets” tile.
   a. Please note that Planning Analytics prefers the following browsers: Chrome, Edge, Firefox.
   b. Appendix A provides overview of adjustments necessary if using Internet Explorer.

2. Login using MSU Net ID and Password.

3. Select HEIDI Dean Expense.

4. When you log on to Contributor, you see a graphical overview of all the areas you are responsible for on the left side of the Contributor screen; the colored icon represents the status of the data entry.

5. To start using Contributor, in the tree on the left side of the screen, click an organization and a table will appear on the right side of the screen. Your screen might look different from what shows below.

6. To start working, expend the organization on the left side and select at the account level.

7. Take Ownership of (.Files) once the application is open to enter data. Icon located at the top left of the screen. This allows the user to make changes within the module.

8. A person can Release Ownership by going to index screen and clicking on this icon (Files). In addition, someone can bounce a user by taking ownership (Files).
**Chapter 4: Application Overview**

**HEIDI Dean Expense Application**

The HEIDI Dean Expense application is used to arrive at the percentage splits between instructional and academic administration for the dean office expenditures. These percentages are then used for the HEIDI annual reporting.

Accounts with split dean expenditures last year will be the starting point for the account list for the current year. The department/PCode utilized the previous year will be loaded for the current year. Enter the Total Account Expenditure. If a department/PCode applies for the current year, fill in the applicable expenditures. If the department/PCode is not applicable, either leave the amount as blank or remove the department/PCode. If a PCode is selected, an amount must be entered.

The total account expenditure, total amount allocated, and remaining amount to be allocated are summarized at the top of each account. The remaining amount to be allocated must equal zero; will be highlighted if not.

To change/add new PCode, use the dropdown in that column and select the appropriate item.

When all entries are complete, **Submit** ( ) your work.

![HEIDI Dean Expense Split](image_url)

**Table:** HEIDI Dean Expense Split

<table>
<thead>
<tr>
<th>Allocation</th>
<th>Department</th>
<th>PCode</th>
<th>Expenditures</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Amount Allocated</td>
<td>$ 0.00</td>
<td>0.00%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allocation 01</td>
<td>SCHOLARSHIPS</td>
<td>0100-Agriculture, Agriculture Operation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allocation 02</td>
<td>OTHER CANIR DEPTS INSTR</td>
<td>0100-Agriculture, Agriculture Operation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allocation 03</td>
<td>DEAN'S OFFICE INSTRUCTIC</td>
<td>0100-Agriculture, Agriculture Operation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allocation 04</td>
<td>Academic Administration</td>
<td>00446-Academic Administration and Pr</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Chapter 8: Print Data / Reset Data

Quick Load to Excel

You can quickly export data to a tab in Excel. Access the quick export from the Action menu by right clicking, selecting Export, and then Snapshot to Excel. *Snapshot to Excel contains static values not linked to the server.* Export to PDF may be useful in providing summary reports/information to various stakeholders. **Please do not use the Slice to Excel function.**

Export Data for Printing:
1. Select Action Menu icon (Ē)
2. Right Click and Select Export
3. Select Snapshot to Excel
4. Click on OK
5. Select Open
6. Format sheet and print

Steps to Reset Tabs and Grid:
1. Select Action Menu icon (Ē)
2. Right Click and Reset view
3. Select any Reset Option

**REMEMBER – Take Ownership to Enter Data and Save Often**
For Questions, Contact

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Appendix A: Internet Explorer Settings

Steps

1. Select “Tools” from Internet Explorer (IE) Menu.
2. Select “Delete browsing history” and delete history.
3. Remove msu.edu from “Compatibility View settings”.
4. Select F12 Developer Tools.
5. Select Emulation tab (image on next page).
6. For User Agent String Select select Internet Explorer 11 (Default).
7. For Document Mode select 11 (Default).
8. For select 11 (Default).
9. For Persistent Emulation Setting select to activate.
Image of adjustments within F12 Developer Tools