

2018-19

Office of Planning and Budgets
Budget Planning and Analysis

Off Campus Credit Instruction
Budget Allocation

Steps to Open Planning Analytics for Training

Open Applications After Overview is Presented

1. VPN using CampusAd or MSU NetID Realm
2. Login using URL for the Planning Analytics TEST site:
<https://pal.test.itservices.msu.edu/pmpsvc>
3. Enter MSU NetID password and Two-Factor

Overview

- Resource Information
- Security Groups
- Application Location and Web Browsers
- Application Overview
- Mentions

Resource Information

The resource guides for Off Campus Credit Instruction (OCC)
and Budget Allocation (BAC)
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

OCC and BAC applications have different security roles.

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/**OCC**-SUBMIT or VIEW

/group/EBS/PA/**BA**-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


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

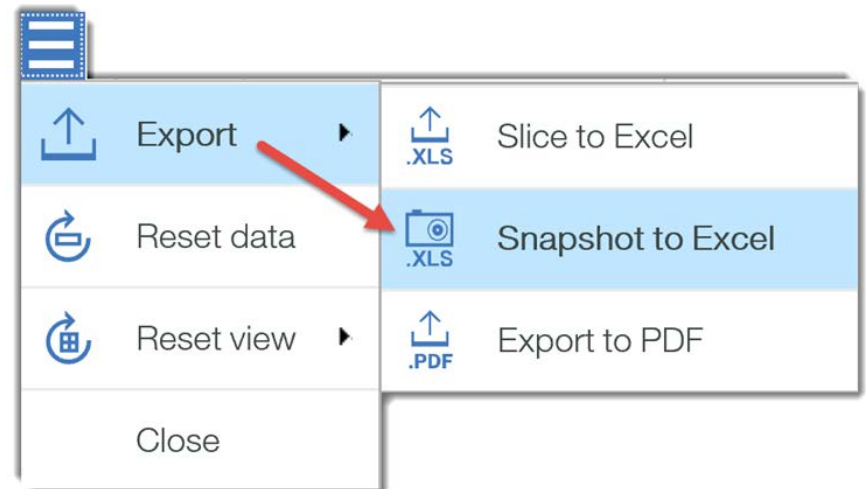
Web Sheets and Cubes

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

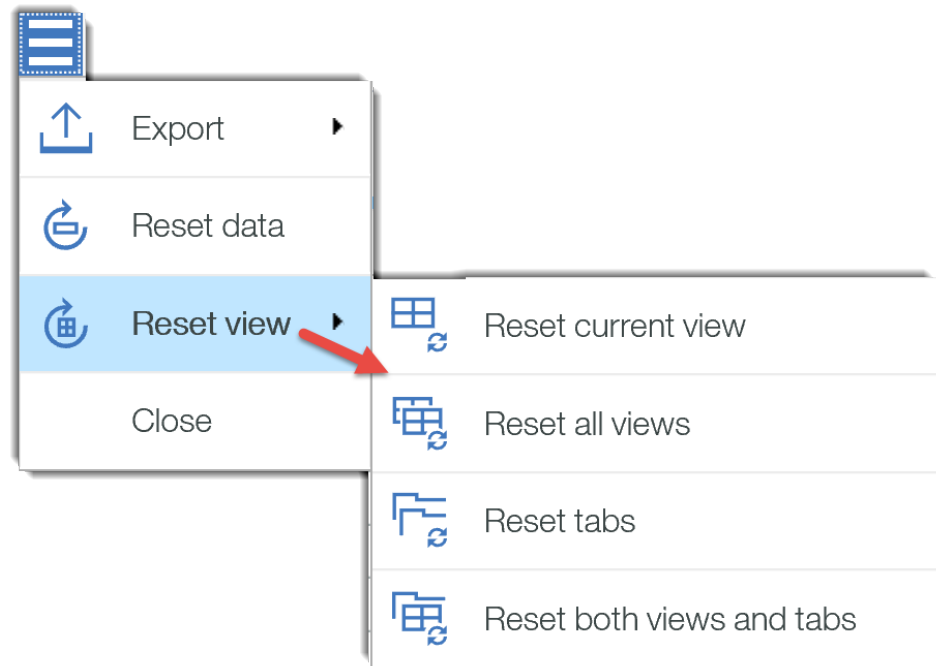
1. Select Action Menu Icon ()
2. Right Click and Select Export
3. Select Snapshot to Excel
4. Click on OK
5. Select Open
6. Format sheet and print



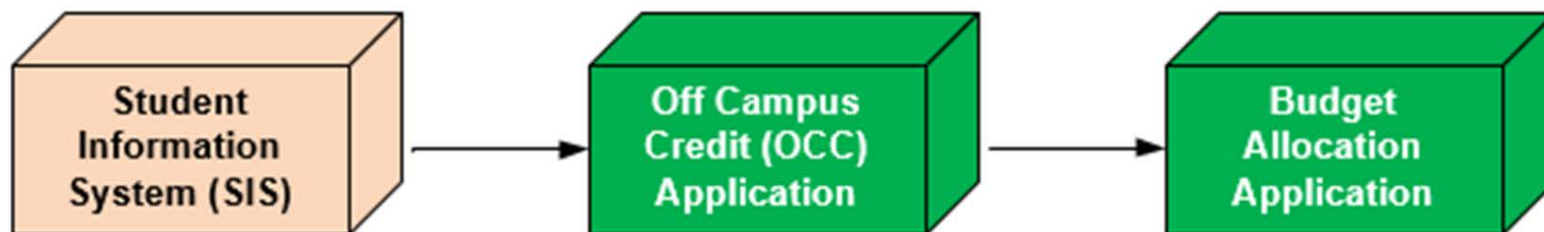
Steps to Reset Application Views

1. Select Action Menu Icon ()
2. Right Click and Select Reset data

Note: It is helpful to “Reset current view” after making changes within a cube.



Off Campus Credit Instruction Model Flow



Off Campus Credit Instruction

- OCC application is used to arrive at the revenue pass-through allocation
- Qualifying student credit hours (SCH) are grouped by student level, residency, and semester
- SCH is multiplied by the tuition rate to derive the revenue amount
- OCC allocation is 75% of the revenue amount
- OCC total allocation is linked to the Budget Allocation application
- **Currently limited to no-more than the FY18 allocation**

Off Campus Credit Instruction Tabs



Tabs within OCC

- **OCC-Trends:** 5-year OCCI allocation pass-thru
- **OCC-Summary:** Condensed allocations by organizations with filtering options
- **OCC-Detail:** Qualifying student credit hours are grouped by student level, residency, and semester. Also shows allocation details.
- **OCC-Exclude:** Courses excluded from OCCI calculation
- **OCC Assumption:** Revenue rates

Off Campus Credit Instruction Trends

MICHIGAN STATE UNIVERSITY		Off Campus Credit - Trend									
	2013-14 Final	2014-15 Final	2015-16 Final	2016-17 Final	2017-18 Final	2018-19 Final	Trend	1Yr %	3Yr %	5Yr %	
	28,682,230	34,224,263	41,193,928	46,865,713	51,681,305	54,960,893		6%	33%	92%	
	1,615,044	2,454,893	3,249,241	3,671,796	4,492,732	5,018,962		12%	54%	211%	
	54,650	65,903	69,424	59,527	73,235	74,183		1%	7%	36%	
	57,057	93,969	134,679	245,332	279,589	469,801		68%	249%	723%	
	0	0	8,463	66,875	94,447	109,649		16%	1196%	0%	
	23,020	42,671	190,266	243,495	322,670	432,506		34%	127%	1779%	
	8,984	13,926	13,201	33,887	91,709	80,471		-12%	510%	796%	
	148,423	138,768	196,383	205,603	275,332	286,490		4%	46%	93%	
	81,411	0	0	0	0	0		0%	0%	-100%	
	22,259	78,679	54,759	63,049	137,949	172,925		25%	216%	677%	
	13,453	175,300	226,293	255,520	235,450	422,733		80%	87%	3042%	
	39,932	59,444	76,353	56,632	68,279	64,247		-6%	-16%	61%	
	687,081	747,341	878,577	959,261	1,244,615	1,156,655		-7%	32%	68%	

Off Campus Credit Instruction Summary



Off Campus Credit - Summary

Fiscal Year:

Course:

Semester:

Residency:

Student Level:

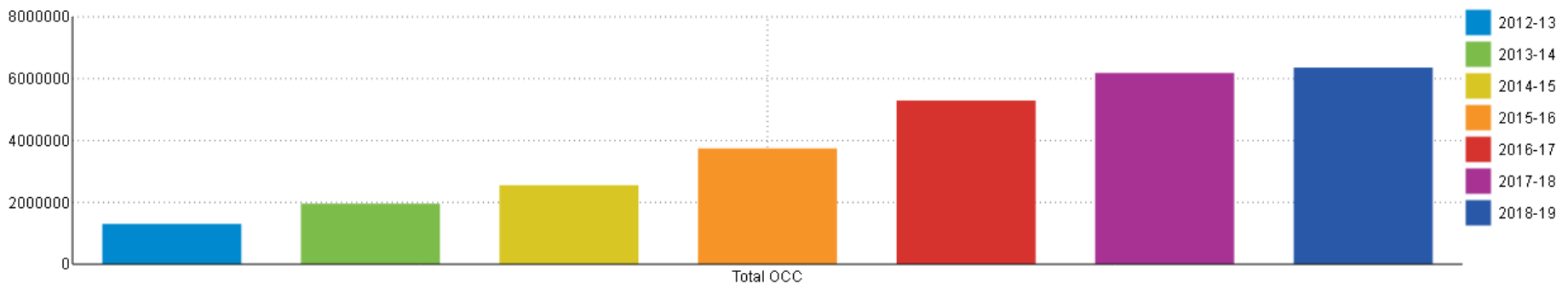
* Right-Click on data in these fields and "Drill" to see Course Data (Check Organization)

Organization	Headcount*	Total SCH*	Off-Campus SCH*	Revenue*	OCC Regular*	OCC Special	OCC Total
	67,510	202,233.0	96,354.0	73,281,191	54,960,893	(838,138)	54,122,755
	7,740	18,696.0	9,896.0	6,691,949	5,018,962		5,018,962
	91	274.0	142.0	98,911	74,183		74,183
	339	1,017.0	882.0	626,401	469,801		469,801
	237	614.0	280.0	146,199	109,649		109,649
	389	1,214.0	1,109.0	576,675	432,506		432,506
	92	245.0	187.0	107,294	80,471		80,471
	258	673.0	544.0	381,986	286,490		286,490
	218	725.0	362.0	230,567	172,925		172,925
	328	984.0	837.0	563,645	422,733		422,733
	58	165.0	149.0	85,663	64,247		64,247
	793	2,327.0	1,943.0	1,542,207	1,156,655		1,156,655

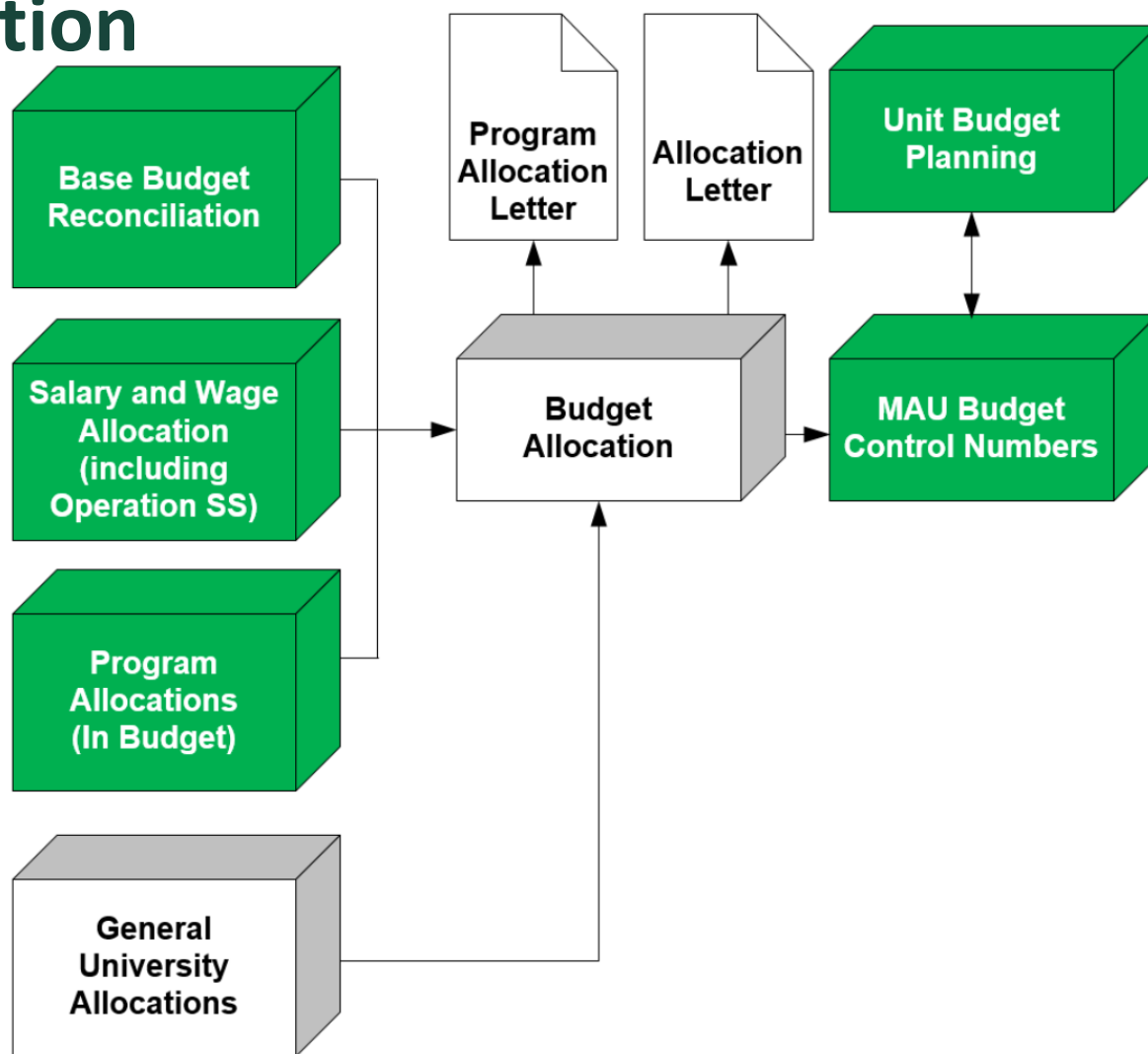
Graphic View of OCC Adjustment Cube

Make selection then click on View Chart and Grid ()

Rows		Columns	
MAU [MAU]	FiscalYear [FiscalYear]	mOCCAdjustments [mOCCAdjustments]	
		+ Total OCC	
	2012-13	1,302,121	
	2013-14	1,962,599	
	2014-15	2,553,255	
	2015-16	3,748,344	
	2016-17	5,291,635	
	2017-18	6,180,008	
	2018-19	6,357,546	



Budget Allocation Model Flow



Budget Allocation Tabs



Tabs within BAC

- **BAC-MAU:** Budget Allocation by fiscal year
- **Default:** Cube view of Budget Allocation data

Other Tabs Available Soon

- **BAC Letter:** Budget Allocation including in-budget program allocation details
- **Link to Program Allocation** for approved in-budget and after-budget allocations by fiscal year

Budget Allocation Calculation

Plus Continuing Base
 Minus PERF Reduction
 Minus Base Budget Reduction
 Plus Salary Annualization
 Plus Salary and Wage Increases
 Plus Recurring Allocations
 Plus Nonrecurring Allocations
 Equals Total Budget Allocation


MICHIGAN STATE UNIVERSITY
Budget Allocation

Fiscal Year:

MAU:

	Allocation
Base Budget	26,037,849
Continuing Base	24,482,082
Reducible Base	24,482,082
PERF %	1.00%
Base Budget Reduction %	1.50%
PERF	(244,821)
Base Budget Reduction	(367,231)
Faculty	90,814
Academic Staff	7,604
Professional	11,290
- TOTAL SALARY ANNUALIZATION	109,708
SI-Faculty	356,745
SI-Academic Staff	40,633
SI-Grad	327
SI-Clerical Technical	2,185
SI-Student Labor	6,245
- TOTAL SALARY/WAGE INCREASES	406,135
SS&E	33,502
Recurring Provost Program Allocation	71,000
- TOTAL RECURRING	104,502
NR Off Campus	(0)
NR Provost Program Allocation	204,870
- TOTAL NONRECURRING	204,870
- TOTAL BUDGET	24,695,244

Budget Allocation Links and Calculation


MICHIGAN STATE UNIVERSITY
Budget Allocation

Fiscal Year:

MAU:

From Base Budget Reconciliation Application


Calculated: Reducible Base x Reduction %

From Salary and Wage Allocation Application

From Program Allocation Application

	Allocation
Base Budget	26,037,849
Continuing Base	24,482,082
Reducible Base	24,482,082
PERF %	1.00%
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- TOTAL RECURRING	104,502
NR Off Campus	(0)
NR Provost Program Allocation	204,870
- TOTAL NONRECURRING	204,870
- TOTAL BUDGET	24,695,244

Budget Allocation Steps

1. Review data within Budget Allocation application
2. Contact Office of Planning and Budget on any questions about allocation
3. No Submit () is needed

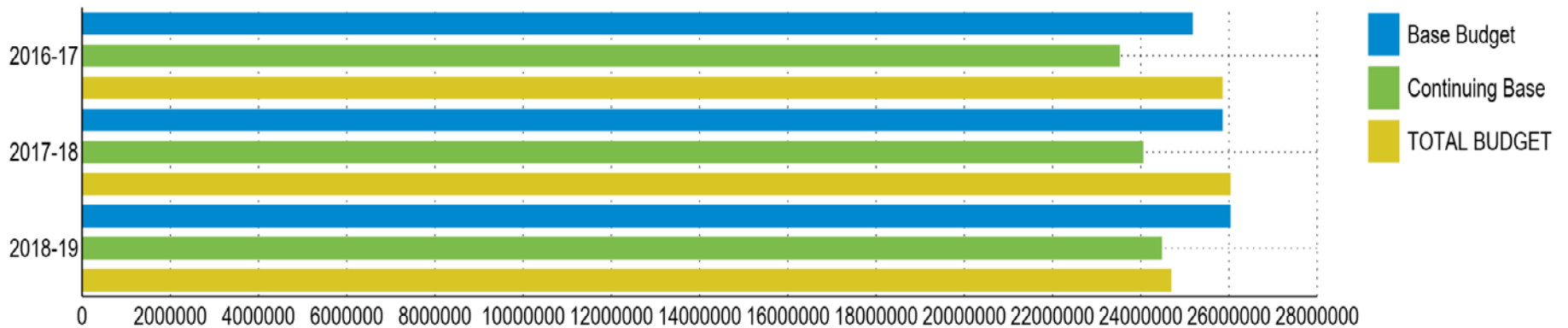
Preliminary allocation amount available on June 26

Final allocation amount available on July 9



Graphic View of BAC Default Cube

Make selection then click on View Chart and Grid ()

Rows	Columns	Context	
mBAC [mBAC]	FiscalYear [FiscalYear]	Budget [Version] [MAU]	
	2016-17	2017-18	2018-19
Base Budget	25,181,664.300000	25,858,091.880000	26,037,848.735554
Continuing Base	23,528,199	24,060,032	24,482,082
- TOTAL BUDGET	25,858,092	26,037,849	24,695,244



Mentions

- No validation rules but rather conditional formatting
- Data links directly between applications
- Contains historical data beginning with 2012-13
- Take Ownership () once the application is open to enter data
- Release Ownership by going to index screen and clicking on this icon ()
- Review and submit OCC by **June 5**; No BAC submit needed
- Save frequently, about half an hour expiration

For Planning Analytics Questions, Contact

Denice Beckwith

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or

Val Thebeau

432-0219

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For Funding and Allocation Questions, Contact

Brent Johnston

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Steps to Open Planning Analytics for Training

Open Applications After Overview is Presented

1. VPN using CampusAd or MSU NetID Realm
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PLEASE

**Do Not Revise Data in TEST Environment
After Training**