

# NUFinancials Budget Adjustments

## Course Guide

This is an advanced course.

## Intended Audience

Financial and business administrators, or anyone who oversees a budget and financial activity

## Course Format

This course is online only, but access to learning is continuous and on demand. You may start learning at any time and review the learning materials at any time. Course support is available via e-mail from an instructor. Contact [admin-systems-training@northwestern.edu](mailto:admin-systems-training@northwestern.edu).

## Enrollment and Completion

- **Course Registration:** Registration via FASIS Self Service is encouraged but optional. Begin the course at any time from the Administrative Systems Training Curriculum. Course sessions are monthly. The purpose of enrollment is to update your Training Summary in FASIS.
- **Course Completion:** At the end of each month, the instructor marks complete all who enrolled during the month. At that time, Training Summaries are updated.

## Learning Sequence

Below is the recommended learning sequence and timeframes.

#	Title	Type	Notes
1	Budgeting Overview	Online	Watch this overview if you want to know how Budget Journals fit into NU budgeting processes.
Part 1: Creating Budget Journals			
1	NUFinancials Budget Adjustments	Presentation	A presentation of business rules for the NUFinancials Budget Journal. Before you watch, print the Chart of Accounts Quick Reference.
2	Adjust a Revenue and Expense Budget	Demonstration	In the demonstration, the basic mechanics of the budget journal are explained. You also see a budget journal that adjusts both revenue and expense budgets.
3	Adjust an Expense Budget	Exercise	
4	Adjust a Revenue Budget	Exercise	
Part 2: Searching and Troubleshooting Budget Journals			
1	Budget Journal Process and Statuses	Presentation	Find the process diagram on page three of this document.
2	Search for Budget Journals	Demonstration	

3	Troubleshoot Budget Journals	Demonstration	Before you watch the demonstration print Budget Journal Troubleshooting (below).
4	Search and Troubleshoot Budget Journals	Exercise	
Library			
NA	Initiating Budget Adjustments	Training Guide	This guide complements part one above.
NA	Searching for Budget Journals	Training Guide	This guide complements part two above.
NA	Budget Journal Troubleshooting	Reference	This reference contains in alphabetical order all error messages that you may see on the Budget Journal, with the potential resolution of the error.
NA	Chart of Accounts Quick Reference	Reference	Print this reference and keep it handy during training.

## Related Resources

These are links to related business processes and policy.

### Helpful Policy Links

The policy organization governing Budget Journals is the Office of Budget and Planning.

<http://www.northwestern.edu/budget/>

For questions about NU account codes, refer to Accounting Services "Guide to Accounts."

<http://www.northwestern.edu/financial-operations/policies-procedures/reporting/guide-to-accounts.html>

### Helpful Reports

All budget journals and their affects are visible in Cognos reports. Approved journals appear on the budget section of the GL008 Revenue and Expense Activity Report.

### Helpful Inquiries

The affects of budget adjustments are visible in NUFinancials budget searches Budget Details and Budget Overview. The journal transactions themselves are visible from the budget searches by drilling to the Activity Log.

## Using YouTube

YouTube has functionality that can enhance your experience of the videos.



Icon	Label	Description
	Pause	YouTube videos start playing by default. The pause button enables you to stop the video.
	Play	The play icon appears after you pause a video. Pause and play are a toggle.
	Volume	The audio controls in YouTube are separate from your computer. We recommend that you keep audio at maximum on the YouTube toolbar and control volume in a single place on your computer.
	Closed Captioning	Closed Captioning is available from YouTube. YouTube converts audio to a written script that it displays on command. The quality of closed captioning is surprisingly good, but imperfect. A full script in document form is available on request.
	Settings	<div data-bbox="410 804 665 1186" data-label="Image"> </div> <p>YouTube controls the visual quality of the video and presents the video at medium quality by default.</p> <p>To sharpen the video (improve clarity), click the cog icon and select 720HD. Doing so is especially important on large screens and HD television screens.</p>
	Large Player	YouTube displays video in a small viewport by default. Use the large player to see a larger display.
	Full Screen	Use the Full Screen option to see the maximum size on your monitor or HD television.