

NUPlans

Budget Preparation in NUPlans

Frequently Asked Questions (FAQ)

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Table of Contents

NUPlans Budget Preparation Data	3
How current are the actuals data (revenue and expenses) in NUPlans?	3
What data flows to NUPlans Contributor overnight?.....	3
What data flows to NUPlans Contributor immediately?	3
Can we get continuous updates from myHR in NUPlans?.....	3
Do changes in the Chart of Accounts flow to Contributor?	3
NUPlans Web	4
Chart String Maintenance	4
How do you add new base chart strings to the budget in Contributor?	4
Add Accounts to Chart Strings.....	4
How do you add accounts to the budget in Contributor?	4
Does NUPlans Web allow you to add accounts to grant chart strings?	4
Change Chart String Status	4
Does a status change in NUPlans Web affect current year financial activity?	4
Grant Proposals.....	4
Can you estimate expenses for grant proposals in NUPlans?	4
Can a dummy chart string (for a grant proposal) be used in Comp Input to budget salary?	4
Salary Placeholders.....	4
How do Salary Placeholders relate to NUPlans Contributor?	4
NUPlans Contributor	5
Contributor Basics	5
The Contributor grid is large, how can I make it easier to work in Contributor?	5
Can you zoom in and zoom out of the Contributor budget grid?.....	5
Is there a fill-down capability, or must every cell be filled individually?	5
Are there keyboard shortcuts for the Reset commands?.....	5
Can we prevent the application from repositioning the view after we save?	5
Filter Rows and Hide/Show Columns	6
Can you filter rows by employee name or employee ID on Comp Input?	6
Can you see one row at a time (or see a few rows) without using the filter?.....	6
Can you search rows by someone's name, employee ID, or project name in Comp Input?.....	6
Can you filter by project number in Grant Input?	6
Can you apply a filter after showing/hiding columns?.....	6
Can you use the filter to display multiple projects on the Fund 172 Input view?	6
Can you filter rows by a range?.....	6

NUPlans Budget Preparation Data

How current are the actuals data (revenue and expenses) in NUPlans?

Actuals loaded into NUPlans are current as of the March close date.

The exact date of salary and other expense actuals is shown on the NUPlans Web Home page and on the NUPlans Contributor Dashboard.

After the cut-off date, actuals are not continuously updated in NUPlans, in order to give budgeters a single point of reference for current year actuals. For that reason, some Cognos BI reports, such as the GL005 or GL068 can be useful, if many weeks pass after the opening of budget preparation and the time that you prepare the budget.

What data flows to NUPlans Contributor overnight?

The following processes take place overnight.

- Creating V3 of a budget
- Creating V4 of a budget
- Any security updates
- Updating all reports for all budget groupings
- Updating chart strings from NUFinancials activity

What data flows to NUPlans Contributor immediately?

As of spring 2017, the following processes take place as soon as you complete the task.

- Adding a salary placeholder
- Adding a grant proposal
- Adding an account
- Changing chart string status
- Creating V2 of a budget
- Saving (recalculating)/Committing/Submitting
- User selecting a budget grouping to update its reports only
- Approving commitments

Can we get continuous updates from myHR in NUPlans?

Continuous updates come from NUFinancials only. Chart strings and grants that are added in NUFinancials are imported nightly into NUPlans. No actuals are continuously updated. No salary funding source changes in myHR flow to NUPlans.

Do changes in the Chart of Accounts flow to Contributor?

Yes, new base chart strings and all changes to all chart strings flow to the budget during the budget preparation season. This includes new accounts (full chart strings), status changes, and description updates.

Before and after the budget preparation season, this flow from NUFinancials to NUPlans does not occur.

NUPlans Web

Chart String Maintenance

How do you add new base chart strings to the budget in Contributor?

Base chart strings are added to your budget following the established process with ChartField Maintenance staff and the Budget Office. After they add your new chart string to NUFinancials, it will appear within 1-2 days in NUPlans.

Base chart strings are not added in NUPlans Web.

Add Accounts to Chart Strings

How do you add accounts to the budget in Contributor?

After your new base chart strings appear in NUPlans, you can add accounts to the chart string, if needed, in NUPlans Web.

Look for the form Add Accounts to Chart Strings in the Chart String Maintenance folder.

Does NUPlans Web allow you to add accounts to grant chart strings?

No. NUPlans Web only allows you to add accounts to non-grant chart strings.

Change Chart String Status

Does a status change in NUPlans Web affect current year financial activity?

No. NUPlans Web is part of budget preparation for the *next* fiscal year.

If you change the status of a chart string from active to "Do Not Budget" in NUPlans, NUFinancials will not create a budget for it next year: no budget on that chart string will be established.

Grant Proposals

Can you estimate expenses for grant proposals in NUPlans?

Yes. NUPlans Web allows you to create a dummy chart string for grant proposals, which you believe will be awarded, in order to estimate expenses for the grant in the next fiscal year.

Can a dummy chart string (for a grant proposal) be used in Comp Input to budget salary?

Yes. After you add the dummy in Chart String Maintenance, it will appear in your budget and be available to you in both grant and compensation views.

Salary Placeholders

How do Salary Placeholders relate to NUPlans Contributor?

The Salary Placeholders form enables you to give specific names to new employees or things that you need to budget. The names appear in the Add/Edit Placeholder Data views in place of the existing generic names (New Employee 1, New Employee 2, etc.).

NUPlans Contributor

Contributor Basics

The Contributor grid is large, how can I make it easier to work in Contributor?

You may feel it makes data entry tasks easier to show/hide columns, filter rows, or to find and display only one (or few) employee(s) or project(s) at a time. The steps to do these things are listed in your training participant workbooks and training materials online.

Can you zoom in and zoom out of the Contributor budget grid?

Yes. One way to zoom is with the plus and minus keys on your keyboard. First, click anywhere outside the grid (for example, click on the toolbar to deactivate the grid), then press the Control and Plus or Minus keys on your keyboard. Press <Ctrl>+<-> to zoom out. Press <Ctrl>+<+> to zoom in.

Is there a fill-down capability, or must every cell be filled individually?

Yes. We recommend using copy/paste to “fill-down” values.

To enter dates quickly cell-by-cell, use the arrow keys on your keyboard to move up and down columns.

For more information about data spreading and other data operations, refer to the online course NUPlans Optional Extras.

Are there keyboard shortcuts for the Reset commands?

No. Unfortunately, there are no keyboard shortcuts for the Reset commands at this time.

Can we prevent the application from repositioning the view after we save?

No, not in NUPlans Contributor. However, you can adjust your view by filtering or hiding columns and/or rows to work only on a portion of the data at a time, which can minimize or alleviate the problems associated with repositioning that occur.

Filter Rows and Hide/Show Columns

Can you filter rows by employee name or employee ID on Comp Input?

Yes. Use the wildcard filter in the Rows dimension named Existing Employees.

From the Subset Editor, click Advanced, click the Filter icon , and select "Filter by Expression." An example of the wildcard filter for someone named *Bianca Guest-De Luca* is *Guest* because you should always surround the text with asterisks. Search is not case sensitive.

Can you see one row at a time (or see a few rows) without using the filter?

Yes. As an alternative to the filter, try the Find in Subset icon  in the Simple pane of the Subset Editor. Name and EMPLID work in the Comp Input view.

Can you search rows by someone's name, employee ID, or project name in Comp Input?

Yes. From the rows dimension, you can use the Find in Subset icon  in the Simple pane of the Subset Editor.

Name and EMPLID work in the Comp Input view. Project name works in the Fund 171 and 172 Input views. However, in the Fund Input views, you must use <Shift>+Click to select all contiguous accounts associated with the project.

Can you filter by project number in Grant Input?

Yes, there are two ways to filter.

In the Simple pane of the Subset Editor, click the Find in Subset icon  and type the project number.

In the Advanced pane of the Subset Editor, click the Filter icon  and select "Filter by Expression." Type the project number surrounded by asterisks. Example: *60022047*

Can you apply a filter after showing/hiding columns?

Yes. First, show the columns you want to see using the Columns dimension, then apply the filter using the Rows dimension.

Can you use the filter to display multiple projects on the Fund 172 Input view?

No. The filter does not allow you to ask for more than one project at a time.

Can you filter rows by a range?

No. However, you can select multiple rows to display. For example, in Comp Input, using the rows dimension, you can <Shift>+Click or <Ctrl>+Click to select multiple employees and then click OK, to see only the employees you selected.

Change Readiness for Distributed Budgeting

#	Questions and Answers
1	<p>Why are there two components of NUPlans?</p> <p>There are two components of NUPlans: NUPlans Web and NUPlans Contributor. In NUPlans Web, qualifying users perform adjunct tasks, such as Commitments, Appropriations, and Chart String Maintenance. They click to make amounts and changes flow to the budget preparation file in Contributor. Web makes it possible to segregate those tasks. Contributor contains the budget preparation file and shows all or part of the budget per the user's role and data security.</p>
2	<p>Does NUPlans change the budget preparation process?</p> <p>No, but some dependencies are removed. In general, budget preparation may start earlier and may extend later. For example, you may have access to NUPlans before appropriations and other aspects of the budget model are finalized.</p>
3	<p>What if our colleagues login to Contributor but they do not see their appropriation?</p> <p>There may be some budgeting tasks that you/they can accomplish before the appropriation arrives. The Budget Office announces appropriations when they are available. At that time, you and other qualifying users can distribute it – or not. You can subsequently redistribute as many times as you need. Just communicate to your internal stakeholders what they need to know.</p>
4	<p>Does security affect how I share information with colleagues?</p> <p>Yes, security may change what some of your colleagues can see. For example, reports tied to security may only be available to you. In the past, you e-mailed a budget preparation spreadsheet provided by the Budget Office. Going forward, you must export a report to Excel in order to share it.</p>
5	<p>Does distributed budgeting change our support model?</p> <p>Yes and no. While technical support still comes from the Help Desk, distributed budgeting may change other aspects of your internal communication protocol. Area Reviewers and Budget Analysts who formerly did the bulk of budget preparation may now provide guidance, develop employees, and implement policy.</p> <ul style="list-style-type: none"> • Area Budget Analysts and Reviewers should be prepared to answer questions such as “What increase percentages should go in the Compensation view? When are projections due? What level of detail or accuracy is expected of me in budget estimates? What do I do with employees who are partially paid by another department?” • Café training can address system usage and outline the options for internal budgeting practices, but will not provide definitive guidance for internal budgeting practices.
6	<p>How can we prepare our colleagues in advance of training?</p> <p>Meet with anyone involved in budget preparation for the first time, explain the process, and preview the training schedule, security access, and budgeting role. An Introduction to NUPlans will also be available on the Café website. Recorded presentations explain in 5-10 minutes the topics you and your staff need for a baseline understanding of the components and capabilities of NUPlans.</p>