NUPlans Application Basics

Video Transcripts

The purpose of this video series is to introduce new NUPlans users to the two parts of NUPlans: Contributor and Web and how they support the budget preparation process.

The three videos in this series and the objectives are below.

Video 1: Introducing the NUPlans Budgeting Applications

- Introduce NUPlans Contributor and Web in the context of budget preparation

Video 2: Tour NUPlans Contributor

- Tour the layout of the Contributor Dashboard
- Open the budget preparation file
- Tour the layout of the Contributor budget preparation file

Video 3: Tour NUPlans Web

- Tour the NUPlans Web Home page, forms, and reports

Video 1: Introducing the NUPlans Budgeting Applications

Topic	Script
NUPlans Budget and Planning	NUPlans is Northwestern University's budget and planning application. NUIT created NUPlans with an IBM product that IBM calls TM1.
What is the budgeting timeframe?	Starting in April, nearly 100 schools and units in the University prepare a budget in NUPlans for the next fiscal year. That budget is submitted for review and final approval by the Central Budget Office near the end of June. In July the budget is uploaded into NUFinancials and made available for you to see in August before it takes effect on September 1st.
What are the two parts of NUPlans Budgeting?	There are two parts of the NUPlans that make budget preparation possible: Contributor and Web. Contributor has the budget preparation file and a dashboard that shows progress. NUPlans Web is where you get budget preparation reports and add things to your budget preparation file that may not exist now.

Video 2: Tour NUPlans Contributor

Topic	Script
Introducing NUPlans Contributor	NUPlans Contributor enables collaborative budgeting with a common budget model adapted to the needs of nearly 100 schools and units in the University.
Tour the Contributor Dashboard	In this part of the video, three budget groupings are staged in different states: Available, Reserved, and Locked. After logging in, you start on the Contributor Dashboard. The dashboard shows you the portion of your area's budget allowed by your security access profile.

	There are four parts of the dashboard, a toolbar, an expandable tree on the left, a progress pane for at the top right, and a message center on the bottom right. The tree shows all budget groupings to which you have access. You may see one or multiple budget groupings, and you may see a hierarchical arrangement, with child budget groupings that rollup to a parent. This example imitates a dean's office view. Expand to see parent budget groupings. They represent internal divisions within a school or unit. Expand again to see child budget groupings. The name of each child budget grouping is linked to the budget preparation file. Click the name to see progress of budget preparation on the right. On the top right, the progress pane shows the parent budget grouping at top and all child budget groupings that rollup to it below. The state of the child budget grouping is shown, whether available, reserved, or locked. In the example shown, both parent and child are available to start budgeting. In this example, the child is reserved and the parent state is Work in Progress. In this example, the child was submitted for review. The state is locked and the parent is Ready, meaning ready for review. Your permissions for the budget grouping are shown, whether you can read, edit, submit it for review, or reject if you are a reviewer. You can see the NetID of the current owner, the NetID of the reviewer, and the date and time that you or your colleague's data was last saved in the Last Data Commit field. At the bottom right, you see explanations of the fields above and messages from the system administrator.
Open the Budget Preparation File	When you prepare a budget, you should work on a child budget grouping. Do not open a parent budget grouping for data entry. The parent is view-only. You can open a child budget grouping in the tree at left. Right-click and select Open TM1 Web Client. Or in the progress pane at right, click the child budget grouping name. The budget preparation file opens in a new window. Notice that your browser's task bar still shows the dashboard is open in the background. Use the task bar to toggle back and forth between them if needed.
Tour the Version Summary View	The entire budget preparation file to which you have access is available in this window. It is organized in views that are accessible with these tabs. The first view is Versions. You can tell you're in the Versions view because the tab is illuminated and the word Versions is in bold. The first time you log in, only one version exists, Version 1. All of us finish the season with an approved version, Version 4, created by the Budget Office. Versions are created in NUPlans Web, and when any new is version is created, you you are told in the status column. On each other view, you can toggle between versions of the budget. For example, you can find Version 4 in the budget preparation file, when it becomes available.
Note the Tab Order	Notice again the tabs across the top of the interface. The main idea in the order of the tabs is that they imitate the budget preparation process. Typically, you start with Compensation estimates for existing employees in Comp Input. Tabs lead to Placeholder views for new employees. A bottom-up expense estimate that you create by employee is summarized at the fund, chart string, and account level in several more compensation views.

	Next, you can enter Grant expense estimates, if any. Then proceed to Fund views to complete the budgets. Let's see one of the views, Fund 172 Input. Wait for a view to load before clicking another tab. Separate views exist for each fund: Operations, Recharge, Designated, Self-Supporting, Gift, and Endowments. In each one you budget revenue and expenses at the account code level according to your needs. Allocations from Central Budget Office, if any, are displayed here. The Carry Forward view summarizes the results of all budgeting that you do in all the views leading to it. So you can imagine the data flowing from left to right. From Compensation to Funds to the Carry Forward view.
Close the Budget Preparation File	You can close the budget preparation file at any time with the X at the top right corner of the browser window. Notice the dashboard is still open in the background, and you are still logged in. To log off completely, click Log Off and close the browser window.
Coming Next	In the next series of videos, you see the views in more depth as we walk through the preparation of a budget from start to finish.

Video 3: Tour NUPlans Web

Topic	Script
Introducing NUPlans Web	NUPlans Web is one of two NUPlans budgeting applications. Whereas NUPlans Contributor houses the budget preparation file, NUPlans Web allows you to interact with the budget preparation file. It has reports that pull and display data that were entered in Contributor. It has forms that enable you to add things to the budget preparation file, if necessary, things you may need in next year’s budget that may not exist now. We’ll return to that idea in a few moments. Let’s start this tour at the NUPlans Web Home page.
Tour the Home Page	The Home page carries messages and instructions from the application administrator. The first sentence directs your attention to the Applications menu at left. The second mentions your security access profile at right. It’s a good idea to check your security access profile the first time you log in. The first table is your application access. Where you see Yes in this table, you can expect to see the corresponding item in the Application menu at left. Below is your security access Role, which reflects the scope of your budgeting responsibilities, as assigned by area Budget Managers. If you see missing applications or an incorrect role, contact your Budget Manager or Budget Analyst for corrections. Your specific contacts are given on a dedicated security web page, which is linked in the bottom center portion of the Home page.
Tour the Applications Menu	All the features you need are in the Applications menu. Expand to see the forms and reports mentioned at right. Applications is the only menu item you need. The Views and Administration menus can be ignored. Let’s open some of these folders and look inside.
Chart String Maintenance	First is the Chart String Maintenance folder. With the first form you can add accounts to a chart strings, if you need them in next year’s budget but they don’t exist there already. The second form enables you to change the status of a chart string to Do Not Budget and back again. Let’s open both forms: Change Chart String Status and Add Account to String. Each form is a single page, and the instructions you need to complete the form are printed on the form itself. Below is a demonstration of the Add Account to String form. Let’s see how these forms work. For example, suppose you need a revenue account on a self-supporting project. First verify the budget grouping. Select the base chart string. Select the account. Review the messages. Green means go. It confirms that the account doesn’t exist on the chart string already. Click Add Account. OK. You can find that account now in the budget preparation file in the Fund 172 tab, within project 10006074. If you have Contributor open, you can go there now. Refresh the view to see the account appear. Other forms work similarly, and for each one, you can find a tutorial that provides more explanation, steps, and the expected result of each one.
Salary Placeholders	Salary Placeholder forms enable you to add the names of recent or planned new hires to the budget preparation file so you can include them in the budget. Let’s open Add Salary Placeholder.

Grant Proposals	Grant Proposal forms enable you to add dummy chart strings that represent grant proposals in progress that are likely to be approved. Dummy chart strings can be used in employee compensation and to estimate grant expenses. Let's open Add Grant Proposal. Notice that I've opened four forms, and that each open form has a tab. They are lined up across the top of the page. It's possible to open more forms than you can see, so watch for the appearance of this arrow in the top right corner that allows you to see the other tabs off screen, We recommend that when you finish with a form, close it with the x on the tab or with this bigger X, called Close Websheet, on the toolbar. Speaking of the toolbar, you rarely need the toolbar when using the forms. Normally, the controls you need are given on the form itself. Unlike Contributor, there is no need to take ownership, recalculate, and commit while within NUPlans Web. In the case of Commitments and Allocations where you do need to recalculate, the steps to do so are in tutorials and job aids. Now let's finish the tour of applications.
Allocations	Central Allocations for your area are shown here when they become available. You can also redistribute the allocation within your area.
Commitments	A set of forms enables commitment processes in areas that use them.
Reports	Reports facilitate analysis, discussions, and reviews of the budget.
Versions	Budget versions that you see in Contributor are created here in NUPlans Web.
Reference	Finally, there are several handy forms in the Reference folder. You can export a snapshot of the budget hierarchy that aligns with your security access profile. There are tips, tricks, training, and contacts in the Office of Budget and Planning.
Wrap Up	Find more information about the forms and reports on the NUIT Administrative Systems Training Curriculum website.
Coming Next	In our next series of videos, you see these features in motion as we walk through the preparation of a budget from start to finish.