

## NUPlans Budgeting Basics

### Course Guide

This is an introductory course available throughout the budget preparation season.

### Intended Audience

- First time users of NUPlans Budgeting
- Any returning user who wants a refresher

### Course Format

This course is online only. There is no in-person attendance; however, 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 Finance, Facilities, and Research 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 a default learning sequence.

Because the NUPlans Budgeting may be used differently in your school or unit than in other schools or units, consult with your Budget Manager or Budget Analyst to focus your effort on parts of the course that complement your school's or unit's operational plan.

#	Part	Length	Medium	Special Instructions
<b>1</b>	<b>Applications Basics</b>			
1.1	Introducing the NUPlans Budgeting Applications	9:49	YouTube video	Meet the application and get tips for using your browser effectively.
1.2	Tour NUPlans Contributor	8:24	YouTube video	Learn the layout of Web and Contributor.
1.3	Tour NUPlans Web	6:49	YouTube video	
<b>2</b>	<b>Getting Started</b>			
2.1	Data Entry Routine in NUPlans Contributor	2:00	Hands-on Exercise in HTML	Learn the basic routine of budget preparation in NUPlans. Exercises appear in a new window and wait for you to click an arrow to begin. The exercise may display a message about Firefox; ignore the message and click OK to continue.

#	Part	Length	Medium	Special Instructions
2.2	Data Entry Techniques in NUPlans Contributor	6:23	YouTube video	
<b>3</b>	<b>Preparing Budgets</b>			
3.1	Budget Compensation: Existing Employees	13:24	YouTube video	Learn the layout and mechanics of views in Contributor. Learn how NUPlans Web interacts with Contributor. <b>IMPORTANT!</b> Ignore videos about functionality that does not align with your security access profile or that you do not intend to use.
3.2	Budget Compensation: Placeholders	8:42	YouTube video	
3.3	Budget Compensation: Totals and Summaries	11:24	YouTube video	
3.4	Estimate Grant Expenses	13:01	YouTube video	
3.5	Budget Revenue and Expenses	11:37	YouTube video	
3.6	Find Budget Balances and Carryforward	5:19	YouTube video	
3.7	Get Budget Preparation Reports	9:42	YouTube video	
3.8	Initiate the Review Process	2:54	YouTube video	
<b>4</b>	<b>Reviewing Budgets</b>			
1	Approve or Reject Budgets in NUPlans Contributor	2:00	Hands-on Exercise in HTML	Rehearse the approval. Learn to help someone who submits the budget too soon or by mistake. Exercises appear in a new window and wait for you to click an arrow to begin. The exercise may display a message about Firefox; ignore the message and click OK to continue.
2	NUPlans Budgeting for Internal Reviewers	NA	PDF Job Aid	A short list of steps in the review process.
3	NUPlans Distributed Review Process	NA	PDF Reference	A longer guide to the review process

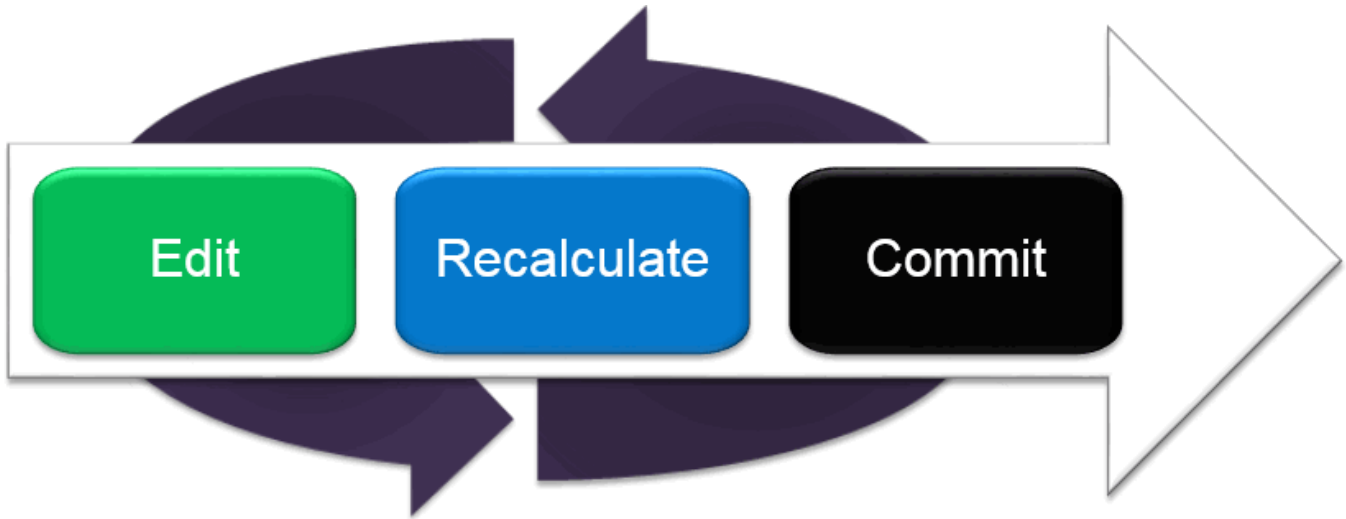
## Library

All documents over four pages have a table of contents.

#	Document	Type	Contents
1	Log in to NUPlans Budgeting	Job Aid	
2	NUPlans Budget Preparation	Checklists	Five checklists, one page each, that help you think of everything and organize your approach to budgeting. Take what you need and leave the rest!
3	NUPlans Contributor Basics	Manual	
4	Budget Preparation Process	Reference	
5	Budget Preparation Glossary	Glossary	
6`	Budget Preparation FAQs	FAQs	

## Edit, Recalculate, Commit

Find this visual in the hands-on exercise, Data Entry Routine in NUPlans Contributor.



## Five-Part Data Entry Routine

Find this visual in the hands-on exercise, Data Entry Routine in NUPlans Contributor.

Action	Icon	Color	Effect
Open the budget	<i>na</i>	Gray	You are in view only mode
Take Ownership		White	You are in edit mode
Edit	<i>na</i>	Green	Data is unsaved
Recalculate		Blue	Data is saved privately
Commit		Black	Data is saved publicly

## 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="412 774 667 1159" 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.