

# What's New in NUPlans?

Virginia Robbins  
Northwestern IT, Training  
Spring 2017

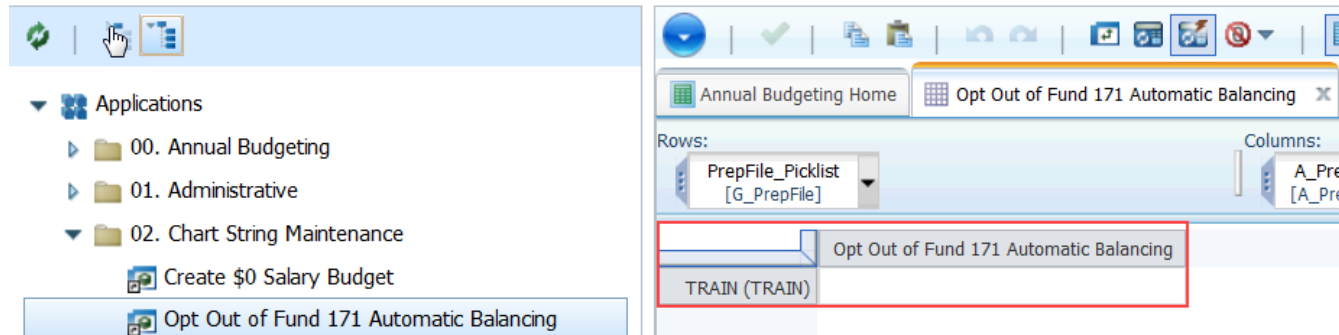
# What's new in NUPlans?

Not much! We're keepin' it simple  
this year!

# What's new in NUPlans?

- Process Changes

- Fund 171 now has the option to opt out of automatic balancing.



- Dean/VP Allocation and Net Budget Appropriation functionality has been removed.

# What's new in NUPlans?

- NUPlans Contributor

- There are some changes to column order on Fund Input Views.
- For Account, there is a separate column each for the code and the description.

Comp Fund Overview | Benefit Rates | Grant Input | Comp Budget by Chart String | **Fund 110 Input** | Fund 120 Input | Clearing Funds | Fund 151 Input | Fund 156 Input | Fund 160 Input | Fund

Columns: G\_Account [G\_Account] | - Fund Input [B\_Budget\_Info] | Context: V1 - Budget Scenario 1 [G\_Scenario] | 110 - General Unrestricted [G\_Fund] | Training 001 (TRAIN 001) [G\_BudgetGrouping]

	⊕ FY17 Bud (as of 3/31)	FY17 Beg CFWD	⊕ FY17 YTD Obligations	FY17 Forecast	⊕ FY18 Budget Target	FY18 Bud Input	⊕ Total Linked In	FY18 Final Budget
<b>Net</b>	<b>(1,013,867)</b>	<b>0</b>	<b>(705,844)</b>	<b>(982,633)</b>	<b>(1,204,937)</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Total Revenue</b>	<b>1,856,787</b>	<b>0</b>	<b>879,776</b>	<b>1,856,787</b>	<b>1,856,787</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Revenue</b>	<b>1,186,943</b>	<b>0</b>	<b>579,481</b>	<b>1,186,943</b>	<b>1,186,943</b>	<b>0</b>	<b>0</b>	<b>0</b>
40313 - NMFF Support-Medical	0	0	0	0	0	0	0	0
40618 - Revenue for Shipping Charge	0	0	0	0	0	0	0	0
40620 - Professional Services-Consulti	0	0	25,000	0	0	0	0	0

# What's new in NUPlans?

- NUPlans Contributor
  - You can use a worksheet for entering salary placeholder data.

**Add Placeholder Data**

- Use this form to add placeholder data within Contributor.  
- Added data can be reviewed in the Edit Placeholder Data view.

1. Select budget version.
2. Select budget grouping.
3. Change department/project (optional).
4. Select placeholder type.
5. Select placeholder.
6. Select number of lines to view.
7. Refresh the page to view the selected lines.

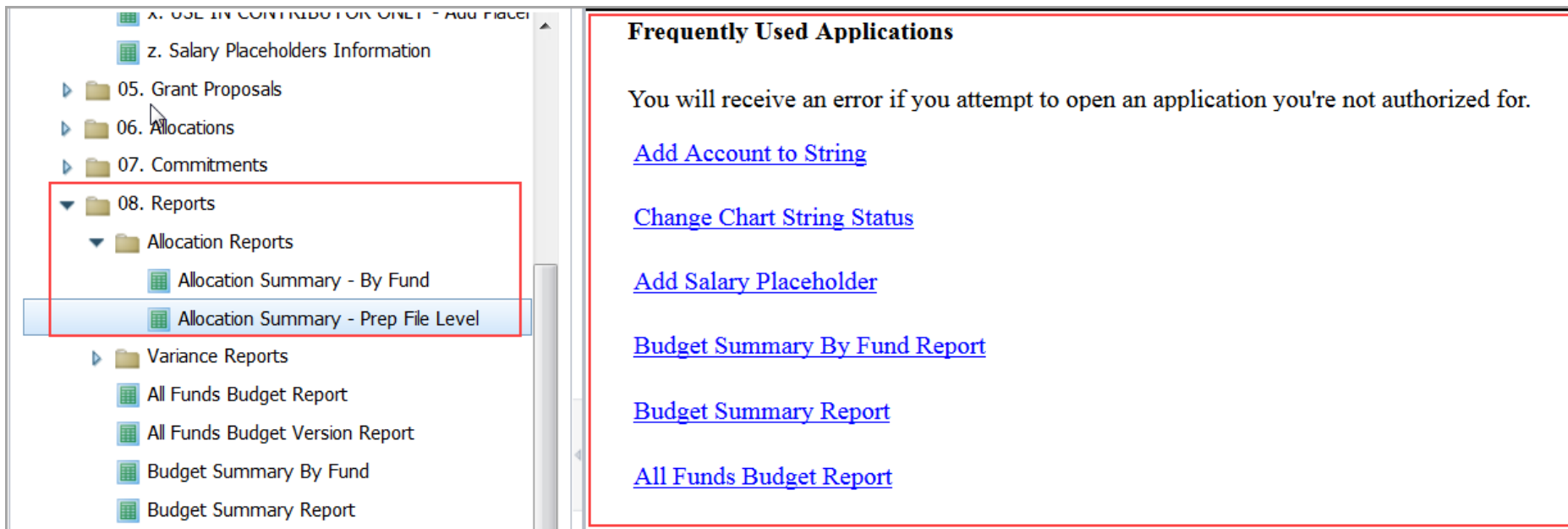
V1 - Budget Scenario 1	Budget Version
Training 001 (TRAIN 001)	Budget Grouping
1011001-10006069-F	Department/Project
Generic New Employees	Placeholder Type
-New Employee 01 - SAL0001	Placeholder
2	Lines to View

[Refresh](#)

Line	Placeholder Approval	Fund	Department	Project	Account	Account Description	Benefit Type
1	Approved	172	1011001	10006069	60011	Faculty Salaries, Regular	Full
2							

# What's new in NUPlans?

- NUPlans Web



The screenshot displays the NUPlans Web interface. On the left is a navigation tree with the following items:

- x. USE IN CONTRIBUTOR ONLY - Add Placeholder
- z. Salary Placeholders Information
- 05. Grant Proposals
- 06. Allocations
- 07. Commitments
- 08. Reports
  - Allocation Reports
    - Allocation Summary - By Fund
    - Allocation Summary - Prep File Level
  - Variance Reports
    - All Funds Budget Report
    - All Funds Budget Version Report
    - Budget Summary By Fund
    - Budget Summary Report

The 'Allocation Summary - Prep File Level' item is highlighted with a blue background and enclosed in a red box. To the right of the navigation tree is a panel titled 'Frequently Used Applications' with a red border. It contains the following text and links:

**Frequently Used Applications**

You will receive an error if you attempt to open an application you're not authorized for.

- [Add Account to String](#)
- [Change Chart String Status](#)
- [Add Salary Placeholder](#)
- [Budget Summary By Fund Report](#)
- [Budget Summary Report](#)
- [All Funds Budget Report](#)

# What's new in NUPlans?

- Data Changes
  - More Endowment funds (471, 472, 473, 481, 482) in the Endowments tab
  - No longer able to budget on transfer codes for Agency chart strings
  - Ability to see the current year budget with any mid-year changes
  - Commitments will be imported from forecasting nightly

# Resources

- Training Curriculum  
<http://ffra.northwestern.edu/training/curriculum.html> > Budgeting tab
- Open Labs  
<http://www.it.northwestern.edu/admin-systems/training/financial/labs.html>
- Support Center
  - 847-491-HELP
  - [consultant@northwestern.edu](mailto:consultant@northwestern.edu)