NUPlans Compensation Views

NUPlans enables budgeters to reference current year salary data for all employees in their budget group and enter compensation estimates for next year's budget.

This purpose of this guide is to show and explain the functionality of the compensation views in NUPlans Contributor: Compensation Input, Add Placeholder Data and Compensation Analysis views.

Contents

Upon completion of this guide, you should be able to:

- Describe the purpose of each compensation view.
- Define the columns of the compensation views.
- Find drills to detail on the compensation views.
- Describe the process of estimating compensation in NUPlans.
- Find tips for entering data in NUPlans.

Who has access?

The NUPlans compensation views are available to budget preparation team members with the access below.

Salary

- Access to salary budgeting in compensation input and related tabs

Salary - Confidential

- Access to employee-level salary budgeting in compensation input and related tabs, and access to add a salary placeholder; able to view confidential employees (those with an HR home department ID ending in 90 or 96)

Prep File

- Includes all other roles except Salary – Confidential; intended for users who have responsibility for submitting the budget for their entire prep file area

See Also

Consult the reference NUPlans Compensation Chart String Statuses for descriptions of all statuses shown on the Comp Input view.

Additional Resources

Access related training materials at: http://ffra.northwestern.edu/training/curriculum.html

NEED HELP? Contact IT Support Center • 841-491-4357 (1-HELP) • consultant@northwestern.edu
Compensation Input view

The Comp Input view displays salary data from FASIS. It includes the current year annual rate, as well as payroll data (actuals and encumbrances). All data is as of March 31st of the current year.

In addition users with Prep File access can opt-in to have next year’s rate brought in nightly from FASIS salary planning. Select Yes on the Import FASIS Merit Data form in NUPlans Web to enable this functionality.

- All employees in the budget grouping are shown in alphabetical order by last name with vacancies at the bottom.
- Roll-up columns are bold. When they are expanded, you may need to page right to see columns on the extreme right side of the grid.
- The grid contains a row for all employees in the Budget Grouping named in the Context dimension, and for each employee, a row for each position and funding source. All other employees are accessible by paging down.

Comp Input Methods

Use FYxx Rate with FYxx Distribution
  - Use next year’s Job Annual Rate with the current year’s Distribution %.

Apply % Change to FYxx Distribution
  - Enter % Change over/under current year’s Distribution amount.

Use FYxx Rate with FYxx Distribution
  - Use next year’s Job Annual Rate, enter next year’s Distribution %.

Use Amount
  - Enter distribution amount for next year in the Amount column.

One Method for the entire Budget Group may be mass-loaded in NUPlans web.
# Rows

There are 4 row dimensions in the view.

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees plus Vacant Positions</td>
<td>Display only</td>
<td>Existing employees in the budget grouping, in alphabetical order by last name, followed by open positions grouped under Vacant Position. NUPlans imports vacancies from FASIS as of 3/31. Use with Vacant Position or Employees without Vacant Position subset. Create a placeholder if the vacancy does not appear in NUPlans and you want to budget for it.</td>
</tr>
<tr>
<td>Position Listing</td>
<td>Display only</td>
<td>Imported from FASIS. Associated with the funding source.</td>
</tr>
<tr>
<td>Security</td>
<td>Display only</td>
<td>This is the Funding Source chart string, used to import the data from FASIS to NUPlans. This may be ignored by NUPlans budgeters, as there is no enforced correspondence between security chart string used to import the data and the chart string you assign going forward.</td>
</tr>
<tr>
<td>Lines</td>
<td>Display only</td>
<td>Line Number used for multiple lines per security chart string.</td>
</tr>
</tbody>
</table>

# Columns

Columns are listed in order of appearance from left to right. Roll-up columns are bold. You may need to click Next Page >> to see all.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>FYxx Chart String</td>
<td>Concatenated</td>
<td>Next year's full chart string. A rule pulls together the chart string pieces from the Fund, Department, Project, and Account columns. This field reflects any changes you make going forward.</td>
</tr>
<tr>
<td>Chart String Status</td>
<td>Dynamic</td>
<td>The status of the chart string, whether active, inactive, or otherwise. This column reflects the outcome of a validation that NUPlans performs on the chart string when you recalculate. A job aid NUPlans Compensation Chart String Statuses defines all possible statuses and your next steps if the chart string is inactive or does not exist in NUPlans.</td>
</tr>
<tr>
<td>FYxx FASIS Annual Rate</td>
<td>Display only</td>
<td>Current year’s total annual salary rate for the position. Imported from FASIS. <em>Previously FYxx Salary (FYTD + Enc)</em></td>
</tr>
<tr>
<td>FYxx Distribution %</td>
<td>Display only</td>
<td>Current year’s salary distribution percentage between chart strings. 100% if position is funded by a single chart string. Imported from FASIS. Will be 0 for accounts like overtime, additional pay, etc.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Type</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>--------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>FYxx Chart String Distribution</td>
<td>Display only</td>
<td>Current Year’s salary amount charged to the chart string listed. Imported from FASIS. Calculated based on FYxx FASIS Annual Rate and FYxx Distribution %</td>
</tr>
<tr>
<td>FYxx Job Annual Rate</td>
<td>Display only</td>
<td>Next year’s total annual salary rate from approved FASIS salary planning. By default, this data does not automatically appear in Contributor. If you have Prep File access, you may import annual job rate information from FASIS to NUPlans Contributor by selecting Yes on the Import FASIS Merit Data form in NUPlans Web.</td>
</tr>
</tbody>
</table>
| Method                            | Input        | Select a method to calculate the salary budget for the row:  
- (no method, no budget)  
- Use FYxx Rate with FYxx Distribution (use next year’s Job Annual Rate with the current year’s Distribution %)  
- Apply % Change to FYxx Distribution (enter % Change over/under current year’s Distribution amount)  
- Use FYxx Rate with FYxx Distribution (use next year’s Job Annual Rate, enter next year’s Distribution %)  
- Use Amount (enter distribution amount for next year in the Amount column)  
One Method for the entire Budget Group may be mass-loaded in NUPlans web. |
| % Change                          | Input        | Use with Method “Apply % Change to FYxx Distribution”  
NUPlans can calculate a FYxx Salary Budget estimate by applying a percent calculation to the amount in the FYxx Chart String Distribution column.  
To do so, enter the percent change by typing a whole number into the cell. The result of the calculation is shown in the FYxx Salary Budget column.  
The % sign is pre-entered for you, indicating that NUPlans will convert the whole number to a decimal. For example, when you type 3, NUPlans converts the number to “0.03” when you exit the cell. If you delete the % sign, you must enter the percentage in decimal format. |
| Amount                            | Input        | Use with Method “Use Amount”  
Enter the salary expense estimated for the funding source for the next fiscal year. NUPlans formats numbers for you.  
Single-click a cell to overwrite the entire contents. Use the <Tab> or arrow key to exit a cell, or use the mouse to exit one cell by clicking another. Double-click a cell to selectively edit specific digits within the cell. |
<table>
<thead>
<tr>
<th>Column Name</th>
<th>Type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>FYxx Distribution %</td>
<td>Input</td>
<td>Use with Method “Use FYxx Rate with FYxx Distribution (next year’s rate, enter next year’s distribution)” Enter next year’s salary distribution percentage between chart strings NUPlans can calculate a FYxx Salary Budget by applying this percentage to the amount in the FYxx Job Annual Rate column.</td>
</tr>
<tr>
<td>FYxx Chart String</td>
<td>Concatenated</td>
<td>A second occurrence of this column, for easier reference. The full chart string. A rule pulls together the chart string pieces from the Fund, Department, Project, and Account columns. This field reflects any changes you make going forward.</td>
</tr>
<tr>
<td>FYxx Salary Budget</td>
<td>Expanded</td>
<td>Next year’s salary amount calculated based on the method selected.</td>
</tr>
<tr>
<td>FYxx Benefits Budget</td>
<td>Expanded</td>
<td>NUPlans rounds the calculation of Salary Budget x CY Benefit Rate by matching the Account from the Benefit Rates.</td>
</tr>
<tr>
<td>FYxx Salary &amp; Benefits</td>
<td>Calculated</td>
<td>A roll-up of the previous two columns. Click the handle (+/-) to expand/collapse the column.</td>
</tr>
<tr>
<td>% Change from FYxx</td>
<td>Calculated</td>
<td>NUPlans calculates the difference between next year’s FYxx Salary Budget and the current year’s FYxx Chart String Distribution amount, expressed as a percent.</td>
</tr>
<tr>
<td>Comments</td>
<td>Input</td>
<td>In this column, users can add row-specific explanations for budget estimates, if appropriate. Comments are visible to and can be beneficial to reviewers.</td>
</tr>
<tr>
<td>New Line?</td>
<td>Input</td>
<td>Click into the field to reveal a drop-down arrow and list. Select add new line to add a new funding source to any employee’s compensation.</td>
</tr>
<tr>
<td>Funding Status Change</td>
<td>Input</td>
<td>Click into the field to reveal a drop-down arrow and list. Select “Remove Funding” or “Reactivate Funding.” Removing makes the method blank and the % Change, Amount and FYxx Distribution % values 0, and those fields are un-enterable thereafter. Reactivating brings back the amounts in those fields. Removing or reactivating will recalculate the data.</td>
</tr>
<tr>
<td>Fund</td>
<td>Input</td>
<td>This column displays the current fund code. Edits are validated when you recalculate.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Type</td>
<td>Definition</td>
</tr>
<tr>
<td>-------------------------</td>
<td>----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Department</td>
<td>Input</td>
<td>This column displays the current department. Edits are validated when you recalculate.</td>
</tr>
<tr>
<td>Project</td>
<td>Input</td>
<td>This column displays the current project, if any. Edits are validated when you recalculate.</td>
</tr>
<tr>
<td>Account</td>
<td>Input</td>
<td>This column displays the current account. To change the value, select account from the list. Edits are validated when you recalculate. Also, as a convenience, you can drill to see the benefit information for the account.</td>
</tr>
<tr>
<td>Chart String Status</td>
<td>Dynamic</td>
<td>A second occurrence of this column, for easier reference. The status of the chart string, whether active, inactive, or otherwise. This column reflects the outcome of a validation that NUPlans performs on the chart string when you recalculate.</td>
</tr>
<tr>
<td>Benefit Type</td>
<td>Dynamic</td>
<td>NUPlans populates Benefit Type by matching the Account with the Benefit Type from the Benefit Rate view.</td>
</tr>
<tr>
<td>FYxx Payroll Info -&gt;</td>
<td>Display only</td>
<td>A sign that tells you all information to the right is display only and for your reference only.</td>
</tr>
<tr>
<td>FYxx Chart String</td>
<td>Display only</td>
<td>The chart string currently associated with the funding source.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Display only</td>
<td>Imported from FASIS. Associated with the funding source.</td>
</tr>
<tr>
<td>End date</td>
<td>Display only</td>
<td>Imported from FASIS. Associated with the funding source.</td>
</tr>
<tr>
<td>FYTD</td>
<td>Expanded</td>
<td>The current salary expense associated with the employees funding source.</td>
</tr>
<tr>
<td></td>
<td>Display only</td>
<td></td>
</tr>
<tr>
<td>Encumbrances</td>
<td>Expanded</td>
<td>The encumbrance placed upon the employees funding source.</td>
</tr>
<tr>
<td></td>
<td>Display only</td>
<td></td>
</tr>
<tr>
<td>FYxx Salary (FYTD+Enc)</td>
<td>Calculated</td>
<td>The sum of expense and encumbrance for the employee funding source. A roll-up of the previous two columns. Click the handle (+/-) to expand/collapse the column.</td>
</tr>
<tr>
<td></td>
<td>Display only</td>
<td></td>
</tr>
<tr>
<td>Benefits Encumbrances</td>
<td>Imported</td>
<td>Imported from FASIS. Associated with the funding source.</td>
</tr>
<tr>
<td>Benefits Charges</td>
<td>Imported</td>
<td>Imported from FASIS. Associated with the funding source.</td>
</tr>
<tr>
<td>HR Home Department</td>
<td>Imported</td>
<td>Imported from FASIS. Associated with the employee.</td>
</tr>
</tbody>
</table>
Process

The process you use to estimate compensation for employees may vary, but in general, you can start by updating the rows in the Comp Input view with any changes to funding sources or their associated chart strings in the next fiscal year.

1. Add, correct, and remove funding sources as necessary
2. Add comments about employee changes
3. Select a method to calculate the salary budget for the row:
   - Use FYxx Rate with FYxx Distribution (next year’s rate with current year’s distribution)
   - Apply % Change to FYxx Distribution (enter % Change over/under current year’s distribution)
   - Use FYxx Rate with FYxx Distribution (next year’s rate with next year’s distribution)
   - Use Amount (enter rate for next year in the Amount column)
4. Enter amounts in the % Change, Amount or FYxx Distribution % columns based on the Method selected
5. Add and/or Edit Placeholder Data
6. Add summary level compensation estimates, if applicable, in Comp Budget by Chart String
7. Analyze compensation with the Comp Totals, Comp Summary, Comp Fund Overview, and Benefit Rates.
8. Add Salary Breakage, if applicable, in Comp Budget by Chart String

Data Entry Tips

- Single-click a cell and type to overwrite the entire contents.
  - Use the arrow keys to exit a cell to the right, left, up, or down.
- Double-click a cell to selectively edit or delete specific digits, or characters, within a cell.
  - Use the <Tab> key or <Shift>+<Tab> to exit a cell and move right or left, respectively.
- Use the mouse to exit one cell by clicking into another cell, adjacent or non-adjacent.
- Track your changes since you last saved by observing the data in green font.
- Click Recalculate to save your changes privately and see your changes in blue font.
- Click Commit (green checkmark) to save your changes publicly (and integrate them into the Working Budget).
Import Annual Job Rates

Users with Prep File access can opt-in to have FYxx Job Annual Rate (next year’s annual salary rate) brought in nightly from FASIS salary planning. By default, this data does not automatically appear in Contributor. Select Yes on the Import FASIS Merit Data form in NUPlans Web to enable this functionality.

Navigation: NUPlans Web > Applications > Comp Input Maintenance > Import FASIS Merit Data
Preselect a Method for the entire Budget Group in NUPlans Web

As a timesaver, you may preselect a method for the entire budget group by using the Mass Load Comp Input form in NUPlans Web. This will *overwrite* any data entered in the Comp Input view. Therefore, Mass Load Comp Input should be used *before* doing any data entry in Comp Input.

Navigation: NUPlans Web > Applications > Comp Input Maintenance > Mass Load Comp Input

Summary Accounts can be budgeted at the employee level as well as the chart string level (ex: overtime, additional pay). Selecting “Yes” to Exclude Summary Accounts is relevant if you are mass loading for All Accounts; not if you are choosing a specific account.
Add Placeholder views

- Add Placeholder Data – Simple
- Add Placeholder Data
- Add Placeholder - in NUPlans Web
- Edit Placeholder Data

Add Placeholder Data - Simple

Add Placeholder Data – Simple is an alternative view for adding placeholder data. The Simple view enables you to avoid seeing placeholders for other budget groupings you’re not currently working on.

Steps

1. If the columns of the view are gray and un-enterable (after you have taken ownership), you may need to change the Context.
   In the Context dimension, verify the [HR_DeptProject] is in your budget group, and if not, select any chart string in your budget group.
   Result: enterable columns turn white.

2. Indicate whether the placeholder is approved or unapproved. If it is unapproved, NUPlans will not calculate benefits and amounts will not flow to Comp Summary or Fund views.

3. Add the chart string of the funding source in the Fund, Department, Project, and Account columns.

4. Enter the budgeted compensation per funding source in the Amount column.

5. Enter explanatory comments.

6. To add another placeholder, click the New Employee [HR_Employee] menu and select New Employee 2, 3, (or any other added placeholders, as needed).
Add Placeholder Data

The Add Placeholder Data view in NUPlans Contributor enables you to budget compensation for new positions or new employees – hired or pending hire – for whom there is no row in the Comp Input view. Add Placeholder Data is initially blank by design and contains five new employee placeholders with five chart string rows each, by default. To add five additional lines, select the rows dimension [HR_CompInput] and select the subset 10 lines. Additional custom-named placeholders may also be added via Add Salary Placeholder in NUPlans Web.

Consider adding all placeholders before budgeting. You can add up to 200 additional placeholders.

Steps

1. If the columns of the view are gray and un-enterable (after you have taken ownership), you may need to change the Context.

   In the Context dimension, verify the [HR_DeptProject] is in your budget group, and if not, select any chart string in your budget group.

   Result: enterable columns turn white.

2. Indicate whether the placeholder is approved or unapproved. If it is unapproved, NUPlans will not calculate benefits and amounts will not flow to Comp Summary or Fund views.

3. Add the chart string of the funding source in the Fund, Department, Project, and Account columns.

   - You can add additional chart string lines on Edit Placeholder Data, if necessary.

4. Enter the budgeted compensation per funding source in the Amount column.

5. Enter explanatory comments as appropriate. For example, enter the name of the new hire or proposed position. Comments are visible to and can be beneficial to reviewers.
Edit Placeholder Data

Edit Placeholder Data is a solution for multiple users to collaborate on new employee compensation.

- It provides visibility to all new employees – those that you add plus all those added by other budgeters in your budget grouping.
- Any new employees added by other users are visible to you and editable.
- Use the view to add or edit funding sources, amounts, comments, and/or approvals, as appropriate.
Compensation Analysis Views

- Comp Totals
- Comp Summary
- Comp Fund Overview
- Comp Budget by Chart String

Comp Totals

The Comp Totals view provides a summary of compensation for each employee, one row per employee.

- The view begins with Total Existing Employees. All data in this section derive from the Comp Input view.
- A second section may exist for Total Placeholder Data, which displays data from the placeholder views. Placeholders may include new employees, new positions, or other compensation expense.

- Comp Totals may be used in tandem with Comp Input.
  1. To see two views simultaneously, click, hold and drag a new view/tab to bottom of the current view/page.
  2. As you get to the bottom of the screen, a dashed border will appear. Release the mouse when you see this. The view is now split in half.
  3. To restore the views/tabs to their normal appearance, click into the Actions menu (blue circle in upper left of screen) and select Reset View > Reset tabs.
Comp Summary

The Comp Summary view exists to provide a summary of compensation by Fund and Account. Funds are grouped in three sections:

- **Budgeted** refers to compensation that flows to your budget. Funding source chart strings are within your budget grouping.
- **Grant Funds** refers to compensation that flows to Grant Input.
- **Not In Budget Grouping** refers to compensation that you estimated but that will not flow to your budget. Examples are Fund 192 and chart strings that you used from outside your budget grouping.

Drill to detail is available in every cell.

1. Right-click in the cell you wish to drill on.
2. Mouse over the drill icon or the word Drill.
3. Click the drill name.
4. Result: the details appear in a new contributor tab to the far right.
5. Be sure to close each new tab when you finish.
Comp Fund Overview

The Comp Fund Overview summarizes salary and benefits by employee and fund. The total estimated compensation is shown. Breakouts follow by fund. All amounts in the view are drillable. Drills lead to a detail of funding sources and chart string statuses.

Drill to detail is available in every cell.

1. Right-click in the cell you wish to drill on.
2. Mouse over the drill icon or the word Drill.
3. Click the drill name.
4. Drill results appear on a new tab in the Contributor Dashboard window (not shown). Be sure to close each new tab when you finish.
5. To return to the Comp Summary View, click into your system tray and select that window (not shown).
Comp Budget by Chart String

The Comp Budget by Chart String view has two purposes: Summary account compensation budgeting and Detail account salary breakage.

- For Summary accounts, you can budget at the account level. Amounts flow to the applicable Fund view as “Linked In Compensation”. Positive amounts are the norm, for example, a $10,000 budget for temporary wages.
- For Detail accounts, you can reduce the amount. Estimates flow into this view from Comp Input. You can reduce the estimate by an amount or percentage. The reduced amount flows to the applicable Fund view where it appears as “Linked In Compensation”.

A. Two Summary accounts are budgeted on chart string 110-1031001: 60111 Temporary Wages and 60112 Overtime Wages, both in the amount of 10,000. The “adjusted salary” is 10,000, and this amount flows to your budget.

B. Salary breakage is shown on two chart strings above.

1) 110-1041001-60060 Administrative Salaries (highlighted in blue above) shows a reduction of thirty thousand. The negative 30000 is entered with the negative sign as –30000. As you can see, if an amount is input, the percentage is calculated.

2) 110-1041001-60101 Professional Exempt shows a reduction of 15 percent. The negative percentage is entered –15.

When you save, NUPlans validates and displays a flag if you entered the wrong sign. If the sign is valid, it calculates Adjusted Salary, and Adjusted Benefits. Compensation flows to the Fund views where it contributes to the final budget.
Benefit Rates view

Benefit Rates is an informational view that exists to display the Benefit Type, Benefit Rates for the next three years, Benefit Account, and Full Federal Rate, if applicable, for every salary account.

<table>
<thead>
<tr>
<th>Benefit Type</th>
<th>FY16 Benefit Rate</th>
<th>FY17 Benefit Rate</th>
<th>Benefit Account</th>
<th>Full Federal Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full</td>
<td>27.20%</td>
<td>27.20%</td>
<td>60186</td>
<td>27.80%</td>
</tr>
<tr>
<td>Full</td>
<td>27.20%</td>
<td>27.20%</td>
<td>60186</td>
<td>27.80%</td>
</tr>
<tr>
<td>Full</td>
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</table>