Grant Proposals & Indirects Report

NUPlans Web
Budget Preparation Process

• During budget preparation, you may know of grant proposals in progress *now* that are likely to be approved and given active chart strings *next year*.

• You can add “dummy” chart strings now to estimate next year’s spending and to budget compensation to be paid by the grant.
Add Grant Proposals

• Use the form named Add Grant Proposals
  – Inside the Grant Proposals folder
  – On the form, you can...
    • Create and name dummy chart strings, which are...
    • Available immediately in NUPlans Contributor (you may need to refresh the view)
      – Grant Input view
      – Comp Input view
      – Placeholder Data view

• With dummy chart strings in Contributor you can...
  – Estimate grant expenses related to the proposal
  – Estimate compensation related to the proposal
Users with the Grants role can access two menu items in NUPlans Web:

- Add Grant Proposal
- Indirects Report
Click Add Grant Proposal.
Click either gray arrow to collapse the menu.
First, select a Budget Grouping. Click the double arrow to begin.
Select the Budget Grouping where the proposal belongs and click OK.
Click into the Fund cell, click the drop down arrow, and select a grant fund from the list.
Click into the Department cell, click the drop down arrow, and select a department from the list.
The grant proposal chart string is displayed. GPXX will be the next ID in sequence.

<table>
<thead>
<tr>
<th>Budget Grouping</th>
<th>Fund</th>
<th>Grant Proposal String</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training 002 (TRAIN 002)</td>
<td>610 - Federal Grants and Contracts</td>
<td>610-1021001-GPXX</td>
</tr>
</tbody>
</table>

3. Enter description.

4. Click to verify proposal status.

5. If the status indicates
Add a Grant Proposal

- You may create a grant proposal chart string within your budget grouping in NUPlans.
- Proposals cannot be added if the budget grouping is locked or if you have view-only access to the budget grouping.
- Proposals are assigned a project ID beginning with 'GP'.
- You will receive an email when your grant proposal is added successfully.
- Once a proposal is created the department ID can't be modified.
- Proposals are added immediately. View new proposals in NUPlans Contributor's GRANT INPUT.

The asterisk indicates unsaved data.

Enter a description that your colleagues can recognize and click Verify Status.
Add a Grant Proposal

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- Proposals cannot be added if the budget grouping is locked or if you have view-only access to the budget grouping.
- Proposals are assigned a project ID beginning with 'GP'.
- You will receive an email when your grant proposal is added successfully.
- Once a proposal is created the department ID can't be modified.
- Proposals are added immediately. View new proposals in NUPlans Contributor’s GRANT INPUT tab.

1. Click double arrows to select budget grouping.
   - Training 002 (TRAIN 002)
   - Budget Grouping

2. Click cells to select from dropdown menus.
   - 610 - Federal Grants and Contracts
   - Fund
   - 1021001 - Operations
   - Department

3. Enter description.
   - Rural medical survey and analysis
   - Proposal Description

The description is saved and a message in green confirms the proposal is Ready to Add.

Scroll down to see the rest of the form.
Click Add Grant Proposal.

1. Click double arrows to select budget grouping.
   - Training 002 (TRAIN 002) Budget Grouping
   - 610 - Federal Grants and Contracts Fund
   - 1021001 - Operations Department

2. Click cells to select from dropdown menus.

3. Enter description.
   - Rural medical survey and analysis Proposal Description

4. Click to verify proposal status.
   - 610-1021001-GPXX Rural medical survey and analysis Grant Proposal
   - Ready to Add. Status

5. If the status indicates 'Ready to Add', click to add proposal.

6. View proposal project ID.
   - Last Grant Proposal Added
Click OK to confirm.
When you return to the Grant Input view in Contributor, you may need to Reset the view (Click Reset > Reset View > Reset Current View). Look for the proposal at the bottom of the list.
Find the Proposal in Grant Input

Proposals appear at the bottom of the Grant Input view.

The proposal is available to estimate expenses.
Use the Chart String in Comp Input

Enter the dummy chart string and proposal ID to budget salary.

The proposal is available to estimate compensation.
INDIRECTS REPORT
Indirects Report

• After entering grant expense estimates, find an F&A total per budget grouping in NUPlans Web.

• Steps
  1. Open the report. Committed amounts are pre-populated.
  2. Click Refresh to get updates (if any) since you opened.

• Results
  – For each Budget Grouping to which you have access, you see:
    • F&A Total
    • Total Direct Expenses Included
    • Total Direct Expenses Excluded
    • Total Direct Expenses
NUPlans Web

Annual Budgeting Training

- Expand the APPLICATIONS directory on the left to access NUPlans Web forms.
- You will only see forms you have access to, based on your access and roles listed on the right.

- If you think your access is incorrect, contact the appropriate individual:
  NUPlans System Access/Security Information
  NUPlans Role Information

Maintenance/Downtime

NUPlans performs nightly maintenance from midnight - 7 a.m.
NUPlans maintenance occurs the Sunday after the second Tuesday of the month from 7 - 10 a.m.

- Attempts to use the system during maintenance windows may result in errors accessing NUPlans, as well as errors or lost data while budgeting.
Version 1 (V1) of your budget defaults.
- You may select a different version.
- Data appears if the version exists.

<table>
<thead>
<tr>
<th>Budget Grouping</th>
<th>F&amp;A Total</th>
<th>Total Direct Expenses Included</th>
<th>Total Direct Expenses Excluded</th>
<th>Total Direct Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training 026 (TRAIN 026)</td>
<td>903,155</td>
<td>2,231,207</td>
<td>36,000</td>
<td>2,267,207</td>
</tr>
</tbody>
</table>

Resources
NUPlans Training Materials
NUPlans Tips and Tricks

Need Help?
Contact the Help Desk at 847-491-HELP option 2, or consultant@northwestern.edu
Review

• Add dummy chart strings for grant proposals to:
  – Estimate related expenses in Grant Input
  – Estimate related compensation in
    • Comp Input
    • Add/Edit New Employees

• Find the Indirects Report in the Reports folder
  – Data in Contributor must be committed in order to appear on the report.