

NUPlans Forecasting Basics

Course Guide

This is an introductory course.

Intended Audience

- All first time users of NUPlans Forecasting
- Anyone with a security access profile in NUPlans Forecasting

Course Format

This course is online only. There is no in-person attendance; however, support is available via e-mail from an instructor. Contact the Administrative Systems training team at 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 Forecasting 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	Medium	Special Instructions
1	Getting Started		
	1. Navigate in NUPlans Forecasting	YouTube video	You may need to raise the volume to hear the narrator.
	2. Enter Data in NUPlans Forecasting	YouTube video	
2	Enter Forecasts		
	1. Enter a Forecast in Detailed Forecasting	HTML/SWF	Exercises appear in a new window, click the arrow to begin. The exercise may display a message about Firefox; ignore the message and click OK to continue.
	2. Enter a Forecast in Chart String Forecasting	HTML/SWF	
3	NUPlans Forecasting Options		
	1. Forecasting Options Overview	YouTube video	You may ignore videos about functionality your school or unit does not intend to use.
	2. Detailed Forecasting	YouTube video	
	3. Chart String Forecasting	YouTube video	
	4. Summary Forecasting	YouTube video	
	5. Adjustments and All Funds Performance	YouTube video	

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Library

All documents over four pages have a table of contents.

#	Document	Approximate Length	Contents
1	Log in to NUPlans	2 pages	The steps to log in with visuals Supported and compatible browsers. Tips for using browsers with web-based applications.
2	NUPlans Forecasting Basics	9 pages	Inside is a narrative about the NUPlans Forecasting System. Topics covered are: <ul style="list-style-type: none"> • The connection of NUPlans Forecasting to NUFinancials and NUPlans Budgeting • Forecasting applications and the data flow between applications • Three system concepts related to productivity within your area: <ul style="list-style-type: none"> ▪ Default forecasting method ▪ Changing the Default Source of the forecast ▪ Preloading the Method column
3	NUPlans Forecasting Overview	9 pages	This document carries definitions of data elements and functionality: <ul style="list-style-type: none"> • Top Ten Ideas • Toolbar Icons • Method Definitions • Dimension Definitions • Using the Subset Editor • Show/Hide Columns or Rows • Column Definitions

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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="414 777 665 1155"> <p>Quality</p> <ul style="list-style-type: none"> 720p^{HD} 480p ✓ 360p 240p 144p Auto </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.