Navigate in NUPlans Forecasting

Video Transcript

Introduction

Context

Getting around in NUPlans Forecasting is easy.

Objectives

In this demonstration, we take a moment to focus on the basics, including a few important tips. This is what we'll cover.

- Describe the layout, menu, and home page
- Open views navigate within views
- Collapse/expand the left menu pane
- Navigate between views
- Close view(s)

Demonstration

During the demonstration, the instructor will do and say the following.

- Describe the layout.
  - If you have used NUPlans Web for budgeting, you'll recognize NUPlans Forecasting. It has the same layout and navigation conventions.
  - At top an identification bar. The Home icon leads to the home page on display now.
  - On the left side is a menu and on the right is a work area.
- Describe the menu.
  - The menu on the left controls your access to forecasting functionality.
  - Everything you need is in the Application folder.
  - The Views folder has some advanced features that are non-essential, such as the ability to create and access your own custom views.
- Describe the Applications folder.
  - Click to expand Applications. Inside are folders arranged sequentially.
    - The sequence here does not represent a process. There is no need to step through these folders in order. However, there is a logic; there are several ideas behind it.
    - First, like budgeting, forecasting can be done from the bottom up, that is, from a detailed level to a summary level. So Detailed Forecasting appears before chart string, and chart string appears before summary.
    - Second, the applications used by most forecasters appear first, followed by applications used by fewer people.
      - For example, everyone needs the Administrative folder and most forecasters work in Detailed and Chart String Forecasting.
      - Fewer people need access to Grant, Salary, and Tuition Forecasting.
      - Only Prep File Managers have access to Summary, Adjustments, and All Funds Performance. If you do not have the Prep File role, you see the folders, but they are empty.

- A third idea is that data entry comes before data summary. The forecast data that you enter flows to All Funds Performance and reports. Again, all data entered flow to this view, All Funds Performance, and to reports, where it is summarized.
- At the very end of the list are Workflow and Reference. Workflow has a form to email reviewers when you finish the forecast. The Reference folder contains useful information.
- Let's open Reference. Several forms enable you to export an account hierarchy that shows how account codes are rolled into account categories. The same categories are used in Summary Forecasting and on the Cognos BI report GL077 Income Statement Report.
- Notice that the Reference folder contains a link to the home page that you see on the right. Come here to redisplay the home page if needed.

- Describe/recognize features of the Home page.
  - The home page has some introductory text. This points you to the folders at left.
  - Your security access profile is shown at the right. You can scroll right to see that, or you can collapse the menu at left to gain more real estate. (COLLAPSE MENU).
  - For each application in the menu, your access is Yes or No. If you have questions about your access, a link on the home page leads to more information.
  - The home page may also carry messages from the system administrator. Down time and outages are announced here.
  - Finally, there is a convenience in the middle of the home page for those of you with access to multiple budget groupings and to those of you with Prep File access. You can preselect a budget grouping to be displayed to you in the applications at left.
  - For example, if you select a budget grouping here, it saves me from having to ask for it each time you go into an application.
- Preload a budget grouping.
  - In this drop-down box, you see all the budget groupings to which you have access.
  - Select one to see it displayed for you in applications. Now let's look inside.
  - First, expand the menu with the toggle here. (EXPAND MENU), A word about this bar that allows to expand and collapse the menu. You can click the arrows, or click hold and drag the areas between the arrows, but you cannot click hold and drag the arrow itself. The arrow is designed to snap open and closed.
  - Let's expand a folder to see what's inside, how about Detailed Forecasting.
- Open a view.
  - Inside a folder you see one of two things.
    - Input views are identified by the blue icons.
    - Forms are identified by the gray grid icons.
  - To open a view or form, just click the name, such as Fund 110 Input. The view opens at right in the workspace.
- Open multiple views.
  - It's possible to open several views and keep them open.
  - To illustrate, I'll open all the views of Detailed Forecasting.
  - As you do, tabs appear across the top of the page.
- Navigate between views.
  - Of course, navigate between views using the tabs.
  - Also, as the number of tabs exceeds the horizontal space that you or your screen allows, navigational arrows appear at the right and left sides.
    - Click the left arrow to skate left. Click the right arrow to skate right.

    – Click the down arrow to see a list of all open views, and click any one to go there.

- Be aware that it's possible to open multiple instances of the same view.
    - It's also possible to open the same one twice. In this example, I have two views named Fund 110 Input. It's possible to enter and save data in both open views. NUPlans will do it's best to ensure that you do not contradict or overwrite yourself. For example, if you enter data in this open view and click into the other open view, NUPlans will save the entered data as you navigate away from the view. So when you arrive in the duplicate, the data is in play.
    - Nonetheless, this is potentially too much to think about, so keep your eye on the tab names and close any duplicates.
- Close view(s).
    - Close the views with the black X on the right side of each tab.
    - Close multiple views with the Actions Menu. Inside you find the options to close the active view, close others, or close all.
- Scroll within a view.
    - Notice that the Input views have a grid organization with columns and rows. A few columns are displayed, but there is obviously more to see.
    - At left, you see the base chart string and name. In this case, just the fund, department number, and name.
    - To its right, you see Net, Revenue, and Expense in bold, with the plus sign to expand into detail. [Click Non-Salary Expense.]
    - When you do, the familiar account codes appear. With the account code present, we are seeing the full chart strings that allow data entry.
    - As with other applications, gray fields are view only. White fields are for data entry.
    - Scroll to the right with this horizontal scroll bar at bottom.
- Collapse/expand left menu pane.
    - Notice that the left column is frozen. It does not move. That is another reason to collapse the menu at left, to gain real estate in the workspace. [EXPAND/COLLAPSE]

Summary

<u>Recap</u>

There are two things I would repeat for good measure.

- The place to go in the left menu is Applications for core functionality. The Views folder is not essential.
- Keep track of the Application views and forms you open, and be careful not to open duplicate views or too many views.

<u>Coming Next</u>

Learn more about the toolbar and data entry in the next episode.

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