

Continue Forecasting Over Time

Did you forecast previously this year? Use this checklist to get the most from conveniences in NUPlans when you update the forecast in the current period.

Forecasters with Prep File Access

If you have the Prep File role, you may take advantage of forms in the Administrative folder.

Checklist	
<input type="checkbox"/>	1. Change the default forecast method from "Use Budget" to "Use Previous Forecast." <ul style="list-style-type: none"> Change the default at the level your area prefers to forecast using the <i>Default Profiles</i> form.
<input type="checkbox"/>	2. Preload certain funds with a different forecast method than the default. <ul style="list-style-type: none"> For example, preload "Use Total Actuals" to maximize productivity in gift and/or cost share funds, if it makes sense for your area. Use the <i>Preload Forecasting Method</i> form.
<input type="checkbox"/>	3. Copy adjustments made in a prior period to the current period. <ul style="list-style-type: none"> Adjustments are not copied automatically. However, you can copy them systematically (all at once per budget grouping) using the <i>Preload Adjustments</i> form.

All Other Forecasters

If you have other security access roles, complete the following as applicable.

Checklist	
<input type="checkbox"/>	1. Contact the Prep File Manager or look for communications from the manager. <ul style="list-style-type: none"> Was a default forecast method (other than Use Budget) applied to the area? Was a different forecast method (other than the default) applied to any funds? Were adjustments that apply to your budget grouping copied?
<input type="checkbox"/>	2. Copy Comments made in a prior period to the current period. <ul style="list-style-type: none"> Comments are not copied automatically. However, you may copy them systematically (all at once) with a form in the Administrative folder. Repeat the copy process for each application where you entered comments in a prior period: Detail Forecasting, Chart String Forecasting, Summary Forecasting, Grant Forecasting, Tuition Forecasting, and/or All Funds Performance.
<input type="checkbox"/>	3. Copy Salary Placeholders added in a prior period to the current period, if applicable. <ul style="list-style-type: none"> All placeholder data, including comments, are copied following these two steps: <ol style="list-style-type: none"> Mark all lines of the placeholder(s) that you want to copy in <i>Add or Edit Placeholder Data</i>. Use the <i>Copy-Move Placeholder Data</i> form to complete the process.
<input type="checkbox"/>	4. Update all forecasts as applicable. <ul style="list-style-type: none"> Update forecasts, using the method "Use Previous Forecast" to maximize productivity where there is no change since your last forecast. Add comments (or edit any comments that you copied) as necessary.
<input type="checkbox"/>	5. Update tuition revenue forecasts as applicable. <ul style="list-style-type: none"> The methods "Use Previous Rate" and "Use Previous Headcount" are available to maximize productivity where there is no change since your last forecast.

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