

Continue Forecasting with Salary Placeholders over Time

Salary placeholders are not copied automatically from one period to another. Because your work in FASIS is reflected in compensation data that flows to NUFinancials, then to NUPlans, you should decide whether to copy the placeholder data into subsequent forecasts.

Copy/Move Placeholder Data

You may copy or move placeholder data to a new period and new or same year. Click the title *Add Placeholder Data* or *Edit Placeholder Data* to open the view (shown below).

Rows:		Columns:		Context:				
Placeholders [HR_Placeholder]	Lines [HR_Line]	Fiscal Year [G_Year]	- Add Placeholder Data [HR_Compensation_Info]	January [G_Month]	Training 001 (TRAIN 001) [G_BudgetGrouping]			
					1011001 [HR_DeptProject]			
		Comments	New Line?	Line Status Change	Copy/Move	To Month	To Fiscal Year	Copy/Move Fl
Staff Additional Pay 2014 (HR0001-0001)	1	Increasing Research Professional to 3/4 time.			Copy	March	2015	
Anticipated salary expense (HR0002-0003)	1	This is the first funding source	Add Line		Copy	March	2015	
	2	This is the second funding source			Copy	March	2015	

If the placeholder data does not appear, you may need to adjust the Context to find it.

Step 1: Mark the lines that you want to copy or move.

With the placeholder data on display, complete the following:

- In the Copy/Move column, select Copy or Move as appropriate.
 - If you Copy, the expense forecast is reflected in both periods (from and to).
 - If you Move, the expense forecast is reflected in the new period only.
 - Select the Month.
 - Select the Fiscal Year.
- Repeat steps 1-3 for each line (each funding source) that you want to copy/move.

Step 2: Run the copy/move process.

Click the title *Copy-Move Placeholder Data* to open the form.

- Select the budget grouping.
- Select the month to copy from.
- Select the year to copy from.
- Click the Refresh button. Result:
 - The form displays a list of all lines marked and that will be included in the copy/move process.
 - If the list does not include all lines that you want to copy/move, return to Step 1, explained at left.
- Click the Copy/Move Data button. Result:
 - All placeholder data is copied (or moved) to the month and year you specified, where it is (or will be) included in the forecast after the period opens.

Manage Placeholders

Several forms and views of the Salary Forecasting application enable you to modify placeholders and fix mistakes.

Modify Salary Placeholder

Do you want to change the description of a placeholder added previously? This form enables you to change the description immediately.

Inactivate-Reactivate Placeholder

Do you want to prevent a placeholder from flowing to your forecast (without deleting the placeholder)?

- This form enables you to inactivate an existing placeholder as of the month and year you specify.
- Given an inactive placeholder, this form also enables you to reactivate it, if necessary.

Inactivate-Reactivate Placeholder Lines (Funding Sources)

Do you want to prevent one line of a placeholder (one part of the salary expense) from flowing to your forecast (without deleting the line)? Use the “Line Status Change” column of either the *Add Placeholder Data* view or the *Edit Placeholder Data* view.

- On any line, select Remove Funding to inactivate the line.
- Given an inactive line, select Reactivate, if necessary, at any time.

Delete Salary Placeholder

Do you want to delete a placeholder that you should not have added or that you added to the wrong budget grouping? This form enables you to delete a placeholder immediately. All associated data, if any, is also deleted immediately.

View Benefit Rates

Use this view to see current year benefit rates and full federate rates per salary and benefit account code.

NEED HELP? Contact IT Support Center • 847-497-4357 (1-HELP) • consultant@northwestern.edu