

Forecast Salary Expenses

NUPlans Forecasting enables you to forecast with reference to existing compensation data and to add anticipated expenses to the forecast.

What compensation data is displayed in NUPlans? Compensation data in NUPlans Forecasting includes the budget, encumbrances, and expenses per chart string and account code. Employee detail is not used in forecasting and therefore not visible in the forecasting application.

How does compensation data flow to NUPlans and how often is it updated? Existing salary and benefits data from FASIS flows to NUFinancials after each payroll run. From NUFinancials, compensation is imported into NUPlans each new forecasting period. Updates in FASIS during the period are reflected in NUPlans when the next new forecasting period opens.

What are the options for salary forecasting? Existing salary can be forecasted in one or a combination of four levels, per the policy in your area: Detailed Forecasting, Chart String Forecasting, Summary Forecasting, and/or All Funds Performance. When you forecast salary, benefits are calculated and added to the forecast automatically.

What is a placeholder? A placeholder is a way to record salary expenses that you anticipate but that are not represented in NUPlans yet. New and anticipated salary expenses that are not included in the imported data from NUFinancials are candidates for placeholders.

Add a Salary Placeholder to the Forecast

Navigate to Applications > Salary Forecasting.

There are two steps to add a placeholder to your forecast: (1) give the placeholder a name and add it to your budget grouping and (2) enter the chart string(s), account(s), amount, and comments.

Step 1. Add Salary Placeholder

Click the title *Add Salary Placeholder* to open the form.

1. Select the Budget Grouping to which the placeholder belongs.
2. Enter a name for the placeholder in the description field.
3. Click the Verify Status button. Results:
 - NUPlans checks to ensure that a placeholder with the same name does not already exist in the budget grouping.
 - Messages state the result of the verification.
4. Click the Add Placeholder button. Results:
 - The placeholder is ready for data entry in the *Add Placeholder Data* view.
 - An email notification appears with a recap: a placeholder was added, the name, and the budget grouping where it was added.

Step 2. Add Placeholder Data

Click the title *Add Placeholder Data* to open the view.

The placeholder should appear on a single line, identified by the name you gave it, as shown at left below.

	Fund	Dept	Project	Account	Benefit Type	Chart String	Chart String Status
Staff Additional Pay 2014 (HR0001-0001)	1 171	1011001	10006069	60030 - Research Professional Salary	Full	171-1011001-10006069-60030	Active
Anticipated salary expense (HR0002-0003)	1						

Display the Placeholder Data

If the placeholder does not appear, you may need to adjust one or more of the context dimensions.

- In the Context dimension group, ensure that “G_Month” displays the current forecasting period.
 - If it does not, click the black arrow on the dimension to select the period.
- Ensure the “G_Budget Grouping” dimension displays the same budget grouping to which you added the placeholder.
 - If it does not, click the black arrow on the dimension to select the correct budget grouping.
- Ensure the “HR_DeptProject” dimension displays a chart string (any chart string) within the same budget grouping.
 - If it does not, click the black arrow on the dimension to select a matching chart string.
 - If you still cannot find the placeholder, you may have added it to the wrong budget grouping. Return to Step 1 to add the placeholder to the correct budget grouping. You may delete the other that was created in the wrong budget grouping.

Add Salary Expense Data

- Enter the chart string of the expense, account, salary amount, and comments in line one.
- Does more than one funding source exist?
 - Click once into a cell in the New Line? column.
 - Select Add Line. Result: a new line appears for an additional funding source.
 - Repeat a & b for each additional funding source.
- For each funding source, enter the chart string, account, amount, and comments. You may edit these values continually as needed.
- Click Recalculate. Results: Forecasts flow to the “Total Linked Data” column of views and reports.

Hot Tip! Placeholders affect forecasts in the current period only. They are not copied automatically to subsequent periods.

Continue Forecasting with Salary Placeholders over Time

Salary placeholder data 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).

	Comments	New Line?	Line Status Change	Copy/Move	To Month	To Fiscal Year	Copy/Move Flag
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. [Jump to "Display the Placeholder Data" for help.](#)

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

Begin with the placeholder data on display. In the example above, you found the data in January and you are copying the data to March. Complete these steps:

- 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