Forecasting in the September Period

When the September accounting period closes in early October, the September forecasting period opens in NUPlans. While September is open, the August period of the prior fiscal year is also open. This means that for approximately one month, two forecasting periods are open simultaneously in NUPlans and remain so until the October forecasting period opens.
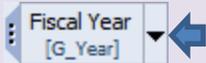
Those of you who want to forecast for the current fiscal year in the September forecasting period must find both the current year and the September period using the Columns and Context dimensions.

The "dimensions" are located near the top of the views below the toolbar.

How to find the September period of the current fiscal year

Navigate to any view in the Detailed, Chart String, or Summary Forecasting folders.

Step	Action
1.	Click the Reload icon 🕐 to reset the view before you begin.
2.	In the Column dimension, G_Year, click the black arrow. Result: a Subset Editor opens with the current year on display.
3.	Click the Subset All icon 🖼 to show all years.
4.	Click to select the current fiscal year.
5.	Click OK. Result: the current fiscal year is reflected in the view.
6.	In the Context dimension, G_Month, click the black arrow. Result: a drop-down list of months appears.
7.	Select September. Result: the September period opens with September financial data reflected in the view.

Next Step

Forecast as usual using the methods of your choice.

How do you find September, current year, in All Funds Performance and forms?

Finding September and the current year in the All Funds Performance folder and other forms in NUPlans is a similar procedure. When selecting a Fiscal Year, use the Subset All icon to find and select the current year.

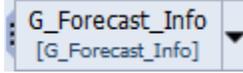### How do you find PY Actuals in the September current year views?

September views do not contain the prior year actuals column (FYXX Actuals). However, it is available and can be added manually to the view, by manipulating the view with the columns dimension "Forecast_Info." The steps required to add a column to a view are on the next page.

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Add Column(s) to a View

All views in NUPlans come with a default series of columns chosen for their usefulness and for their interest to end users. Nonetheless, there may be times when you want to add a column to a view. Below is an example that refers to the September forecasting period, when the previous year actuals column is available but does not appear by default.

How to add the previous year actuals column (FYXX Actuals) to a view

Step	Action
1.	Click the black triangle on the column dimension G_Forecast_Info. G_Forecast_Info [G_Forecast_Info] ▾
2.	Click the Advanced button to see the expanded view of the Subset Editor (below). • On the left side, there is a pane called "Available Elements" with a list of all columns available. Previous year actuals (FYXX Actuals) is included in the list. In the example below, you see FY13 Actuals. • On the right side, there is a list of columns currently on display.
3.	Find FYXX Actuals column on the left. (Use the scroll if necessary.)
4.	Click, hold, drag, and drop the column to the desired position on the right. • As you move the mouse over the list of columns on the right, a blue bar appears between column names to indicate the drop target. When you release the mouse, the column will "drop" into place where the blue bar indicates.
5.	Click OK. Result: your changes are applied to the view.