NUPlans Application Changes – Fall 2015

Simplified Log in and Session Management

NUPlans now uses Single Sign On (SSO) for user authentication.

After October 2015	Before
Once inside the NUPortal, or when logged in to SSO, you are <u>not</u> asked to supply credentials again to NUPlans.	You provided a NetID and Password again to NUPlans.
The SSO URL should be on your browser's list of trusted web sites (websso.it.northwestern.edu) and you should allow popups from that site.	SSO URLs did not exist for NUPlans.
When you click Log Off /Out inside NUPlans Web or Contributor: ▪ The "NU Online Passport" page appears. ▪ The SSO session is ended, which includes any other applications that you launched in the same session.	Logging off NUPlans affected only NUPlans.
One login grants access to both Web and Contributor.	You logged in to each one separately.
NUPlans Web and Contributor use the same session simultaneously.	You created two different sessions if you wanted to use Web and Contributor simultaneously.
You can navigate from NUPlans Web directly to Contributor and vice versa.	Web and Contributor were not navigationally linked.

Expanded Browser Capability

NUPlans has expanded support for web browsers.

After October 2015	Before
NUPlans supports Chrome, Firefox, and Internet Explorer (IE).	Firefox and IE were the recommended browsers, and Chrome was not supported.

NUPlans Global Interface Changes

NUPlans has an improved look overall and a different Recalculate icon.

After October 2015	Before
The Recalculate icon has a new look:	It looked like this:
Recalculation is faster! When you recalculate, NUPlans updates only the cells affected by your data entry without refreshing the web page.	NUPlans refreshed the web page after recalculating, which increased your time and effort.
Row and column labels are highlighted in gold to indicate the current active cell for better contrast with the text labels, and highlighting follows as you move from cell to cell with your keyboard.	Dark blue highlights (over black text) appeared only when you clicked into a cell.
Like Excel, you can right-click in a cell and add comments to the cell.	A separate column offered the only solution for comments.

NUPlans Contributor Budgeting

Dashboard

After October 2015	Before
You can add commentary (notes) and attachments on the Dashboard.	The Dashboard had no such notes and attachments capability.
Commentary and attachments are stamped with the date, time, and author NetID.	The only stamp was for committed data.
NUPlans now stores the current and multiple prior years, and there is a new naming convention for the budgets: • NUPlans_FY17_Budget (current) • NUPlans_FY16_Budget • NUPlans_FY15_Budget	The current and prior year were called: • NUPlans_Budget (current) and • NUPlans_Budget_Prior_Budget_ Cycle.
Release ownership using an icon on the Dashboard.	There was no release capability.

Budget Preparation File

After October 2015	Before
Ownership is now both take and release. You may take ownership only if there is no other current owner.	Ownership was "take" only, and each new owner took it from the previous owner.
Contributor has a Home page that displays your security access profile and information from the Budget Office and the NUPlans application team.	The only "Home" page was in NUPlans Web. The "landing" page in Contributor was Version Summary.
The toolbar has fewer icons because some are now grouped within an Actions Menu. The Export, Reset Data, and Reset View commands are found inside.	Export and Reset icons occupied the toolbar.
Navigational tabs appear in one row, with next and previous arrows to display tabs that slide "offscreen" and out of view.	Navigational tabs stacked in multiple rows, depending on the width of your computer screen and browser window.
A global navigational menu is available as an alternative in addition to the navigational tabs. Find it with the drop-down arrow on the far right side of the navigational tabs.	Tabs were the only way to navigate through the budget preparation file.
You can recalculate data without refreshing the entire page. • Your experience is uninterrupted. • The page does not flash and reposition itself.	Recalculating data refreshed the web page and repositioned the view.
Drill results now open a new tab within the Contributor budget preparation file, at the far right side.	Drill results from Contributor opened in the Dashboard window.
Both the Rows and Columns dimensions open directly into the Advanced Subset Editor.	Rows and Columns dimensions opened the Subset Editor in "Basic" view. The Advanced view was an extra click.
The Show/Hide icons in the Subset Editor have a new look. • Show is now: • Hide is now:	The Show icon – called "Keep Selected Elements" – was the white checkmark on green.
Related to the Subset Editor, a layout (Subset) that you choose in one Fund view persists when you navigate to other Fund views.	Upon navigating to each new Fund view, you chose a preferred layout again.

Export to Excel

After October 2015	Before
Exported data is formatted with numeric symbols in Excel, such as the percent (%) and dollar signs ($).	Exported data had no numeric symbols.
A Cancel button enables you to stop an export, if it's taking too long.	No Cancel button was available.

NUPlans Web Changes

After October 2015	Before
NUPlans now stores the current and multiple prior years, and there is a new naming convention for the budgets: ▪ nu_planning_FY17 (current as of March 2016) ▪ nu_planning_FY16 ▪ nu_planning_FY15	The current and prior year were called: ▪ nu_planning (current) ▪ nu_planning_ prior_budget_cycle
Selection dialogs display only child budget groupings where appropriate.	It was important to avoid parent budget groupings in many selection dialogs.
Selection dialogs feature a Quick Search field that finds matches based on text you enter (an alternative to scrolling through the list).	A search was available through the binoculars icon.
Selection dialogs can be activated by clicking anywhere in a cell.	You had to click directly on small white arrows.
An Actions Menu now groups and contains several icons that used to appear on the toolbar, such as Export, Close, and Close All.	Export, Reset Data, and Reset View appeared on the toolbar.
After opening multiple forms and views, you may close them all with two clicks Actions > Close All. The Home page reappears.	You closed forms and views one at a time.
After opening multiple forms and views, navigational arrows appear that make the row "slide" to reveal tabs that were off screen. Another arrow reveals a global navigational menu.	After opening multiple forms and views, it was possible to lose sight of tabs off screen.
Recalculation is faster. For example, on selecting a forecasting method, NUPlans auto-recalculates quickly.	Auto-recalculation refreshed the web page and repositioned the view.
An additional auto-recalculation saves when you click away from one view to another.	It was possible to navigate away from unsaved data in a view.
In NUPlans Web Budgeting, you can pre-select a budget grouping – a convenience for users with multiple budget groupings.	Pre-selecting was available only in Forecasting.
In both Budgeting and Forecasting, an improved pre-selection prevents one user from overwriting another.	In offices with multiple users working with the same budget groupings, each subsequent user overwrote the previous selection.
In NUPlans Web Budgeting, after a budget is submitted for approval and it is "locked," improved Web forms prevent you from adding new things to the budget – like new accounts and placeholders.	Messages appeared that the budget was locked, but after you had started the procedure (you typed a description or clicked Add to start the process).