NUPlans Application Changes – Fall 2015
Enhancements and IBM Product Upgrade
Overview

• Simplified Log On/Off with Single Sign On (SSO)
• NUPlans Forecasting and NUPlans Budgeting
  ▪ Enhancements by NUIT Administrative Systems
  ▪ Improvements by IBM to its product Cognos TM1
• Application changes only (Web and Contributor)
• Business processes are unaffected.
• In budgeting, ownership is now both take and release!
Single Sign-On (SSO) Login

- Use the NUPortal to avoid re-entering credentials
- The NU Online Passport appears:
  - when using the Financial Applications Gateway
  - and after log off/log out
NUPlans Web
Forecasting and Budgeting
• Cleaner appearance.
• “Administrative” folder is hidden.
Auto-Recalculation

- Gold highlights offer better contrast.
- Auto-recalculation is faster!
  - Does not refresh the page
  - Does not reposition the grid!
Forecasting - Adjustments

- Recalculate icon has new look.
On this screen, the only changes are on the toolbar: Recalculate and Actions Menu.

Also, linked training is updated.
Forecasting – All Funds Performance

- Results are formatted with numeric symbols (% and $).
- Cancel button is available.

<table>
<thead>
<tr>
<th>Non-Grant and Cost Share Funds</th>
<th>-</th>
<th>1,585,938</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Non-Grant Funds</td>
<td>-</td>
<td>1,560,938</td>
</tr>
<tr>
<td>Operating Funds Sub-Total</td>
<td>-</td>
<td>1,339,685</td>
</tr>
<tr>
<td>Unrestricted</td>
<td>-</td>
<td>1,257,227</td>
</tr>
<tr>
<td>110 - General Unrestricted</td>
<td>-</td>
<td>1,257,227</td>
</tr>
<tr>
<td>151 - Allen Center</td>
<td>-</td>
<td>(283,351)</td>
</tr>
</tbody>
</table>
You can pre-select a budget grouping in NUPlans Web Budgeting.

New! In both Forecasting and Budgeting, users in the same office with the same access cannot overwrite one another.
Select Budget Grouping

- Selection dialogs offer a text-based Quick Search.
- Only child budget groupings are shown in the list.

1. Select budget grouping.
2. Click cells to select from dropdown menus.
3. Review string and status.
4. If the status is 'Does not Exist', click to add account.
Cell Comments – Add Comment

- Right-click in a cell.
- Click Add Comment.
Add/Browse
- Cannot be edited
- Cannot be deleted

Spending authority from Fund 110 via "Dean's Allocation" per discussion of 3/15/18.
Cell Comment – Browse Comments

Cell is marked with red flag.
NUPlans Contributor
Dashboard and Budget Preparation File
Use method A or B to open the budget preparation file. Ignore “Open Do not use.”
After you take ownership, the Release Ownership icon appears on your Dashboard. When you finish working on the budget, you must Release Ownership to enable the next person to take ownership.
The budget preparation file now has a Home page. Navigational tabs occupy a single row. Arrows lead to more tabs “off screen.” The budget preparation file now has a Home page.
Changes related to Take Ownership:

- You cannot take it away from someone else.
- An error message appears if you try.
- You are allowed if "Current Owner" is None.
Same gold highlights indicate location.
Same speedy recalculation.
Same cell Comments feature.
### FY15 Salary (FYTD + Enc)

<table>
<thead>
<tr>
<th>Employee</th>
<th>FY15 Salary</th>
<th>FY16 Salary Input</th>
<th>% Change from FY15</th>
<th>FY16 Salary Budget</th>
<th>FY16 Benefits Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asha, Benjamin - 0200001</td>
<td>1021001-40004293-F</td>
<td>31,695</td>
<td>3.50%</td>
<td>32,804</td>
<td>8,923</td>
</tr>
<tr>
<td></td>
<td>1021002-60026851-F</td>
<td>20,639</td>
<td>0.00%</td>
<td>20,639</td>
<td>5,614</td>
</tr>
<tr>
<td></td>
<td>1021002-60026871-F</td>
<td>20,639</td>
<td>0.00%</td>
<td>20,639</td>
<td>5,614</td>
</tr>
<tr>
<td></td>
<td>1021002-60020585-F</td>
<td>20,639</td>
<td>0.00%</td>
<td>20,639</td>
<td>5,614</td>
</tr>
<tr>
<td></td>
<td>1021002-60020301-F</td>
<td>20,639</td>
<td>0.00%</td>
<td>20,639</td>
<td>5,614</td>
</tr>
<tr>
<td></td>
<td>1021002-600203941-F</td>
<td>20,639</td>
<td>3.10%</td>
<td>20,000</td>
<td>5,440</td>
</tr>
<tr>
<td>Attaway, Shirley - 0200002</td>
<td>1021002-40004293-F</td>
<td>3,372</td>
<td>3.50%</td>
<td>3,490</td>
<td>949</td>
</tr>
<tr>
<td>Auden, Mary - 0200003</td>
<td>1021002-40004293-F</td>
<td>18,620</td>
<td>3.50%</td>
<td>19,272</td>
<td>5,242</td>
</tr>
<tr>
<td>Avey-Conne, Jeanne - 0200004</td>
<td>1021002-40004293-F</td>
<td>1,000</td>
<td>3.50%</td>
<td>1,000</td>
<td>382</td>
</tr>
<tr>
<td>Awatrami, Ramadevi - 0200005</td>
<td>1021002-40004293-F</td>
<td>14,126</td>
<td>3.50%</td>
<td>14,977</td>
<td>4,377</td>
</tr>
<tr>
<td>Baron-Cohen, Marie Clare - 0200006</td>
<td>1021002-40004293-F</td>
<td>39,878</td>
<td>3.50%</td>
<td>41,927</td>
<td>12,277</td>
</tr>
<tr>
<td>Benjelloun, Jean Luc - 0200007</td>
<td>1021002-40004293-F</td>
<td>14,997</td>
<td>3.50%</td>
<td>15,522</td>
<td>4,222</td>
</tr>
<tr>
<td>Bennani, Laurent - 0200008</td>
<td>1021002-600136968-F</td>
<td>8,003</td>
<td>3.50%</td>
<td>5,000</td>
<td>1,260</td>
</tr>
<tr>
<td>Bennani, Laurent - 0200008</td>
<td>1021002-600120368-F</td>
<td>19,750</td>
<td>3.50%</td>
<td>20,441</td>
<td>5,560</td>
</tr>
<tr>
<td>Bennani, Laurent - 0200008</td>
<td>1021002-600120368-F</td>
<td>43,250</td>
<td>3.50%</td>
<td>44,761</td>
<td>12,176</td>
</tr>
<tr>
<td>Cantrell, Michelle - 0200009</td>
<td>1021002-40004293-F</td>
<td>34,276</td>
<td>3.50%</td>
<td>35,476</td>
<td>9,649</td>
</tr>
<tr>
<td>Crayton-Thomas, Yvonne, Y. - 0200010</td>
<td>1021002-40004293-F</td>
<td>2,917</td>
<td>3.50%</td>
<td>3,019</td>
<td>821</td>
</tr>
<tr>
<td>Cveka, Mirva - 0200091</td>
<td>1021002-40004293-F</td>
<td>3,700</td>
<td>3.50%</td>
<td>3,830</td>
<td>1,042</td>
</tr>
<tr>
<td>Dem, Peter L - 0200012</td>
<td>1021002-40004293-F</td>
<td>42,420</td>
<td>3.50%</td>
<td>43,905</td>
<td>11,942</td>
</tr>
<tr>
<td>DJurhus, Eba - 0200013</td>
<td>1021002-40004293-F</td>
<td>1,051</td>
<td>3.50%</td>
<td>1,088</td>
<td>296</td>
</tr>
</tbody>
</table>
Some changes to Rows and Columns Subset Editors.

No changes to default layout of Fund Views.
Subset Editor opens into the expanded view (formerly called “Advanced”).

Subsets are alternate layouts.
This layout removes Totals from the top of the page.
New! Your choice of layout now persists from view to view.

“Total Chart Strings” is not displayed.
New! Your choice of layout now persists from view to view.
The Actions Menu groups several icons:
- Export
- Reset Data
- Reset View
- Close (X)
Show/Hide Columns

1. Open the Columns Subset Editor.
2. Select columns to show/hide.
3. Click Show or Hide.
4. Click OK.

Show/Hide columns has three minor changes:

- The “Show” icon has a new look.
- Filter by wildcard is now called “Filter by expression.”
- Like rows, your choice to show/hide columns persists from view to view.
Each fund tab contains revenue and expense chart strings for a specific fund (or multiple funds, in the case of Gifts and Endowments).

- All chart strings can be budgeted at the account level for both revenue and expense accounts.
- NUFinancials budget and actuals data is as of March close for FY 2015.
- Chart strings in NUPlans are updated nightly based on activity in NUFinancials. However, the historical budget/actuals amounts are not updated.
- More information about this view is available here: NUPlans Fund Views

Most account rows have two available input columns:

1. **Bud Input**: Input next year’s budget
2. **Actual Input**: Input the actual amount spent

Some accounts may have a budget preloaded.
After you take ownership, the Release Ownership icon appears on your Dashboard. When you finish working on the budget, you must Release Ownership to enable the next person to take ownership.
If you are unavailable, a Prep File Manager can release ownership on your behalf. Others who also have access to the budget grouping can see that you are the current owner.
Scroll right to find Commentary Status and click!

Click the yellow icon to add notes and attachments!
Add commentary and attach files.
Each one is stamped with date/time and user.
Next Steps

• Download the presentation, reference, and job aid at right.
• Share the materials with colleagues.
• Visit us in class to see and use the new features.
• Questions? Let’s talk in the chat pod below:
Recap

- Contributor ownership is now both take and release!
- Improved color palette and contrast
- Faster recalculation
- Cell comments
- Single Sign On (SSO)
- Web and Contributor now share a single “session”
  - They are linked navigationally
  - Use your choice of Chrome, Firefox, or IE
  - No need to use different browsers when using both simultaneously