What’s New in NUPlans
For FY’17 Budgeting
Agenda

• Review upgrade from Fall ‘15
• Security access changes
• Multi-Factor Authentication (MFA)
• Budgeting changes
  – Additional Funds and zero dollar budgets
  – Add F&A Rate on Grant Proposals
  – Compensation Input
  – Budget Summary Reports
• Important Dates, Training, Questions?
Fall ‘15 Upgrade

- Single Sign On (SSO)
- Take & Release ownership
- Tabs appear in one continuous row
- Row and Column highlighted
- Recalculating improved & new icon
- Drill results open in Contributor tabs
Fall ‘15 Upgrade

✓ Comments
  ✓ Cell level – right click
  ✓ Dashboard comments & attachments

✓ Subset Editor
  ✓ Defaults to Advanced
  ✓ Icon updates
  ✓ Filter by Wildcard > Filter by Expression

✓ Actions menu
  ✓ Contributor
  ✓ Web
Spring ‘16 Changes
# FFRA Express Security Form

**Applicant Information**

<table>
<thead>
<tr>
<th>Applicant Information</th>
<th>New User</th>
<th>School or Department Transfer</th>
<th>Inactivate</th>
</tr>
</thead>
</table>

*Date*  
*Name (Last, First M.I.)*  
*Title*  
*Department*

* *indicates required field

**NUFinancials – Data Entry and Inquiry**

- **Optional:** Model an existing user’s access: Name: [ ] NetID: [ ]
- Expense Entry and iBuyNU Shopper  
- Budget Journal Entry  
- CRT Entry  
- CRT Inquiry  
- Expense Entry, Requester and GL Journals  
- Ship To Code required: [ ]

**Sponsored Accts (NUFinancials):**  
- Post Award Inquiry  
- Post Award – AR Inquiry View

**Cognos Report Access – Monthly Financial and Supply Chain included**

- Budget/COA  
- Sponsored Program Mgmt  
- Salary Access  
- Ad Hoc Query Viewer  
- Ad Hoc Query Author (training required)  
- SES Encumbrance

**Approvals (indicate values on page 2)**

**Workflow:**  
- Level 1 ($0-$1,499)  
- Level 2 ($1,500-$4,999)  
- Level 3 ($5,000 and up)

**Special Approvals:**  
- Budget Journals  
- Project Pre-Approval

**NUPlans (budget grouping required)**

- Planning Viewer  
- Planning Submit  
- Planning Approver  
- Salary Budgeting  
- Forecasting Viewer  
- Forecasting Update/Edit  
- Forecasting Approver

**Budget Grouping or Depts:**

http://ffra.northwestern.edu/security/
Multi-Factor Authentication
Multi-Factor Authentication (MFA)

- **Required** for all NUPlans users
- FASIS MFA users are already registered

1. Register - install on device(s)
2. Authenticate
   - Persistence for 30 days:
     - Same computer
     - Same browser
     - Don’t clear cache/cookies
MFA Registration Required

Online Passport
Your single sign-on access to University systems

Multi-factor Authentication Required
You are attempting to access a system enabled with Multi-factor Authentication. You will need to register to continue.

Click to begin the registration process.

http://www.it.northwestern.edu/security/multi-factor-authentication/index.html
Confirm Your Identity with Multi-factor Authentication

STEP 1. Have your registered phone ready. Need help?
How would you like to be notified to confirm your identity for this login?
- Duo App (xxx)xxx-8891
- Call Me (xxx)xxx-8891
- Text Me (xxx)xxx-8891
- Enter Passcode from Duo

STEP 2. Remember me on this computer and browser for 30 days? Your NetID login is still required. Help me decide.
- Yes
- No

SEND MY NOTIFICATION NOW
Budgeting Changes
Additional Funds in NUPlans

• **Clearing Funds** 131,133
• **Student Loans** 510, 520, 530, 540
• **Agency Funds** 710, 720, 730, 731, 732, 740, 750
  – Create $0 Salary Budgets in Chart String Maintenance in NUPlans Web.
Create Zero Dollar Salary Budgets

Agency Funds 710, 720, 730, 731, 732, 740, 750
Add Grant Proposal

1. Select budget grouping.
   - Training 005 (TRAIN 005) - Budget Grouping
   - 650 - Other Grants and Contracts - Fund
   - 1051001 - Operations - Department

2. Click cells to select from dropdown menus.
   - 650-1051001-GPXX - Grant Proposal String
   - Proposed Wind Turbine Grant - Proposal Description

3. Enter description.
   - Proposed Wind Turbine Grant

4. Enter F&A Rate (optional).
   - F&A Rate

5. Click to verify proposal status.
   - 650-1051001-GPXX Proposed Wind Turbine Grant - Grant Proposal
   - Ready to Add.

6. If the status indicates 'Ready to Add', click to add proposal.
## Compensation Input

- **Position Information**
- **Vacant Positions**
- **FY16 FASIS Annual Rate**
- **FY17 Job Annual Rate**
- **FY16 Distribution % and Amount**
- **Compensation Budgeting Methods**

![Compensation Input Table and Diagram]
Import Annual Job Rates
Compensation Budgeting Demonstration
Comp Input Maintenance

Mass Load Comp Input
- You may mass load a budget calculation method for existing employees as well as vacancies and placeholders.
- Select which lines to mass load, based on the fund and account used for budgeting.
- For loading All Accounts, select if summary accounts (those that can be budgeted at the employee as well as the chart string level) should be excluded or not.
- Mass loading requires the budget grouping cannot be locked, you must be able to update the budget grouping and the version must exist.
- Mass loading occurs immediately.
  - **Mass loading will overwrite existing data.**
  - However users with sandbox data will be unable to view the method that is loaded.
  - View mass loading results in NUplans Contributor's COMP INPUT or EDIT PLACEHOLDER DATA tabs.

1. Select budget grouping.
   - TRAIN (TRAIN) - Budget Grouping

2. Select criteria for lines to load:
   - All Funds - Fund
   - All Accounts - Account
   - No - Exclude Summary Accounts?
   - No - Include Vacancies?
   - No - Include Placeholders?
   - V1 - Budget Scenario 1 - Version

3. Select method and enter corresponding numeric value:
   - Rate, % Change or Amount (numbers only) - Method

4. Click to load the method.

Mass Load Comp Input
Comp Input Methods

• Use FY17 Rate with FY16 Distribution
  – Use next year’s Job Annual Rate with the current year’s Distribution %.

• Apply % Change to FY16 Distribution
  – Enter % Change over/under current year’s Distribution amount.

• Use FY17 Rate with FY17 Distribution
  – Use next year’s Job Annual Rate, enter next year’s Distribution %.

• Use Amount
  – Enter distribution amount for next year in the Amount column.

One Method for the entire Budget Group may be mass-loaded in NUPlans web.
Budget Summary Reports

• Budget Summary Report
  – Uns suppress zero rows prompt
• Budget Summary by Fund
• Budget Summary Totals by Prep File

Remember to Commit Data and Update Reports!
Budget Summary

The image shows a screenshot of a budget summary report software interface. The report includes options to select version, budget grouping, and view printer-friendly reports. The table displays various account categories with actuals, budget, forecast, and grants data for fiscal years FY15 to FY17.

The table categories include:
- Rev: Tuition & Fees
- Rev: Redistributed Tuition
- Exp: Financial Aid
- Revenue: Net Tuition & Fees
- Rev: Revenue (budget)
- Rev: Grants & Contracts - Direct
- Rev: Grants & Contracts - Indirect
- Rev: Redistributed ICR
- Rev: Endowment Distributions
- Rev: Other Investment Income
- Rev: Gifts
- Rev: Dean’s Tax
- Rev: Affiliate Mission Support
- Rev: Fellow’s Reimbursement
- Revenue: Sales, Services & Other

The table values range from negative numbers to positive numbers, indicating financial data for different fiscal years.
Budget Summary By Fund
# Budget Summary by Prep File

## Budget Summary Totals by Prep File

1. Select version:
   - V1 - Budget Scenario 1

2. Select fund:
   - 110 - General Unrestricted

3. Click to refresh the data.

### Prepar File

<table>
<thead>
<tr>
<th>Prep File</th>
<th>Total Revenue</th>
<th>Total Expense</th>
<th>Net</th>
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<tbody>
<tr>
<td>TRAIN (TRAIN)</td>
<td>12,949,841</td>
<td>12,871,841</td>
<td>78,000</td>
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<tr>
<td>Parent 001</td>
<td>2,412,049</td>
<td>2,409,049</td>
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<td>1,138,916</td>
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</table>
Important Dates

• April 14\textsuperscript{th} MFA was applied to NUPlans
  – Register a primary device and a backup!
• April 20\textsuperscript{th} NUPlans opens for budgeting
  – Classroom training available 4/20 to 6/10
• NUPlans Budgeting closes at the end of June
  – Refer to your department/budget analyst for individual review due dates
Training

• Online courses
  – Registration optional
  – FMS701 NUPlans Budgeting Basics
  – FMS705 NUPlans for Grants
  – FMS706 NUPlans Advanced Topics

• Classroom sessions
  – Registration required
  – FMS707 NUPlans Compensation Budgeting
  – FMS708 NUPlans Fund Budgeting

http://ffra.northwestern.edu/training/curriculum.html
Questions?