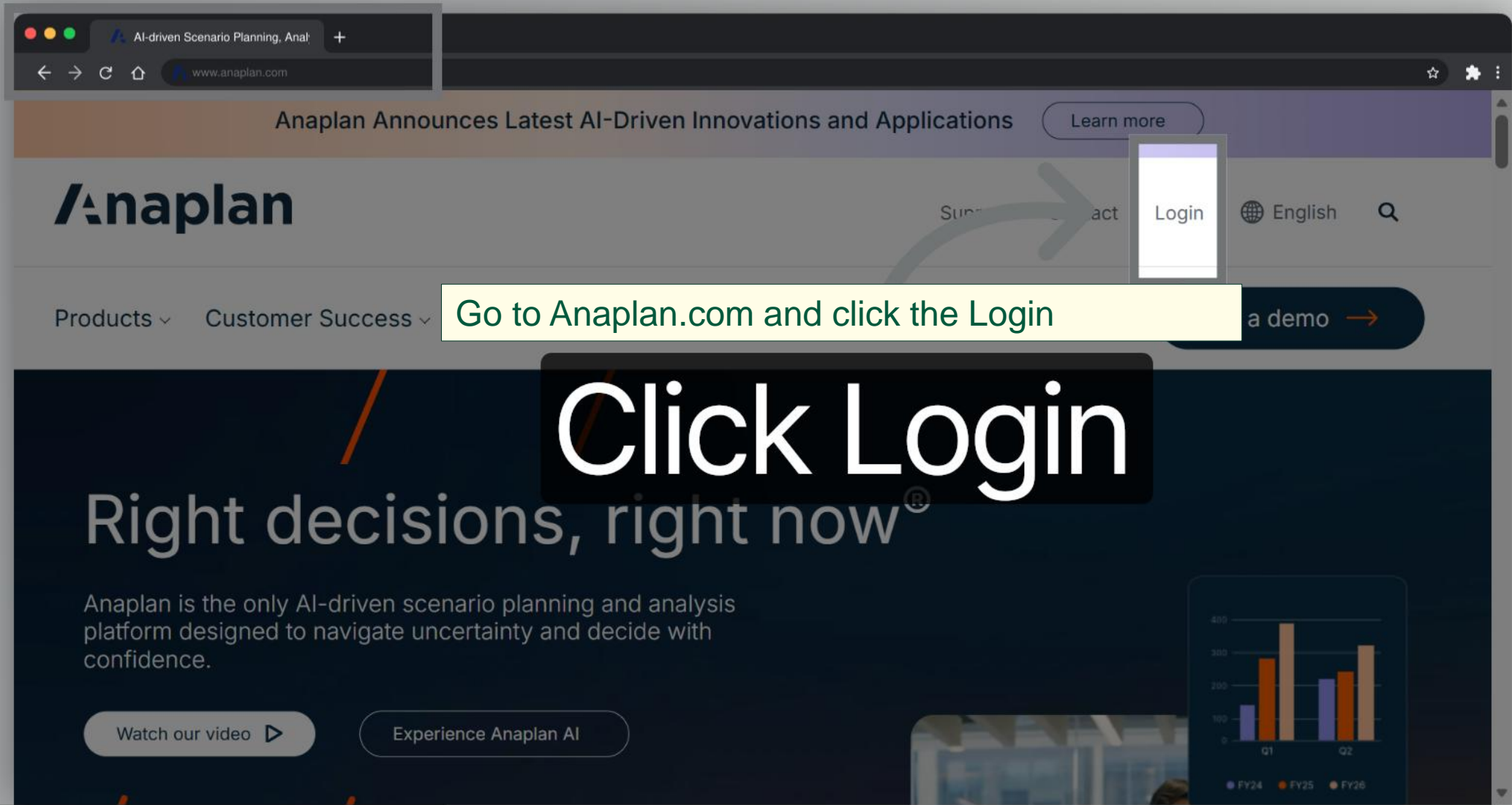


NDSU University Budget & Planning Tool

Budget Manager User Guide - Anaplan

Updated May 2026

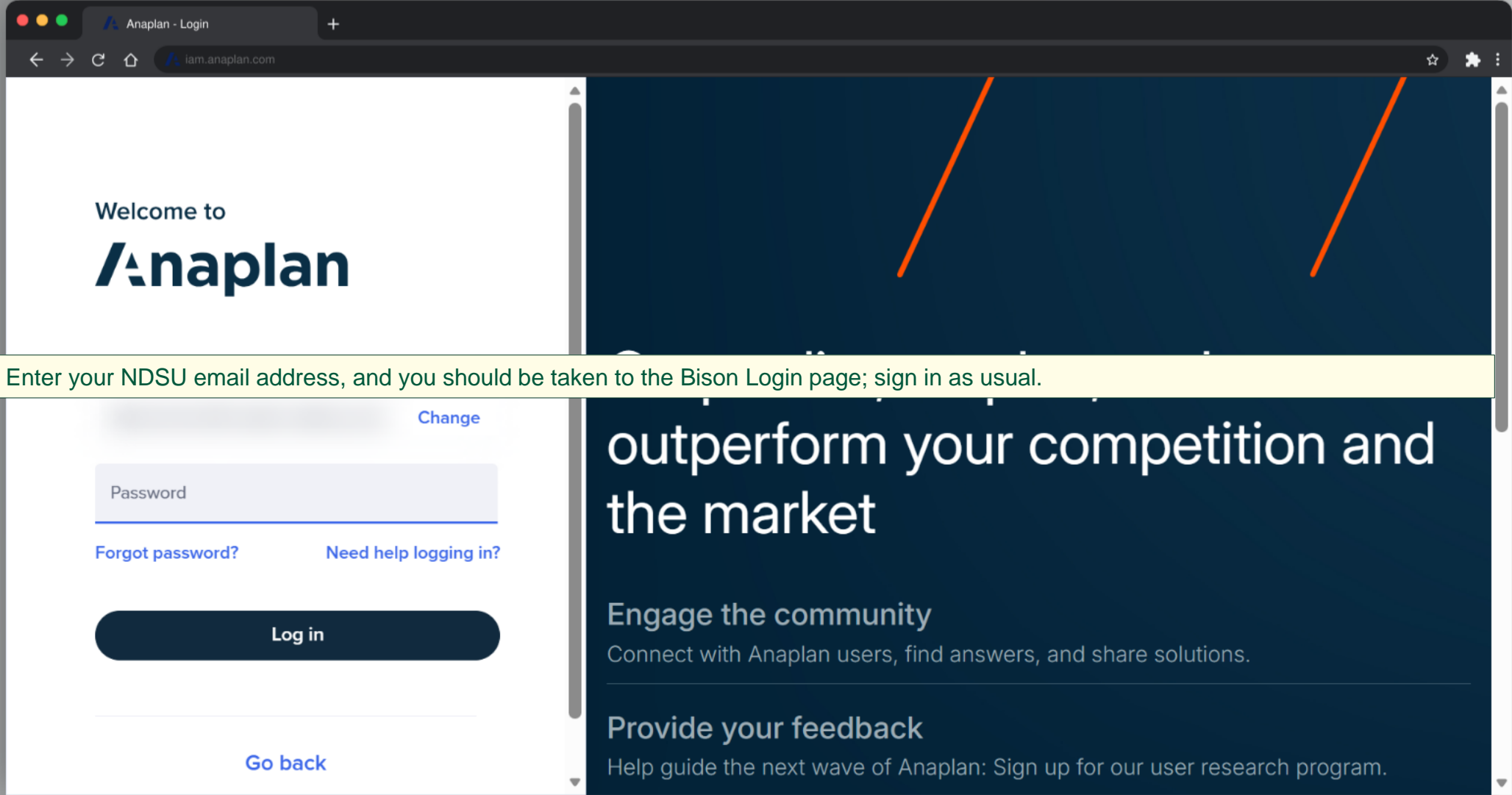




Go to Anaplan.com and click the Login

Click Login

www.anaplan.com



Enter your NDSU email address, and you should be taken to the Bison Login page; sign in as usual.

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Anaplan

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Connect with Anaplan users, find answers, and share solutions.

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Once signed in, users will be taken to the respective landing page, depending on which role has been assigned. If a user does not have access to a page or group of pages, they will be grayed out. Information displayed on each page will also be dependent upon which department(s) a user has been given access to.



Non-Personnel Planning

→ NP01: Input Page

→ NP02: Summary Page

→ NP04: Budget vs Actuals

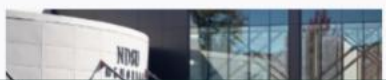


Personnel Planning

→ PP01: Personnel Input

→ PP02: Personnel Details

→ PP03: Department Summary



Tuition Incentive Model (TIM)

→ TIM00: Credits by Department

→ TIM02: Tuition Allocation by Depart...

→ TIM03: Allocated Tuition & Expense

→ TIM04A: Academic - Allocated Model

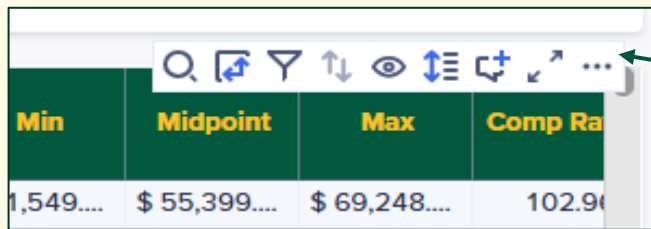


Executive Reporting

→ BM00 : Executive Summary

Export Functionality

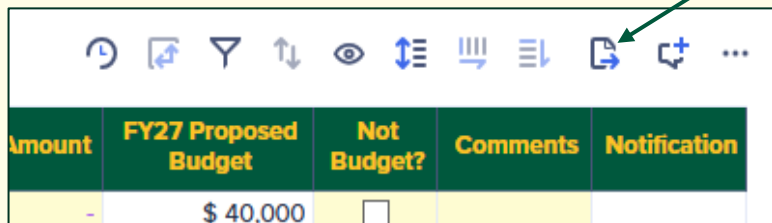
Most pages, graphs, and grids in Anaplan are exportable. This functionality is accessed by either a 'page' icon or by selecting the 'dots' icon. Users may need to hover over the upper right area of a given grid or graph for these options to appear.



A screenshot of an Anaplan grid header. The header has four columns: 'Min', 'Midpoint', 'Max', and 'Comp Ra'. Below the header, the first row of data is visible with values: '1,549...', '\$ 55,399...', '\$ 69,248...', and '102.90'. A tooltip is open above the grid, showing various icons for search, refresh, filter, sort, visibility, list view, and a 'dots' icon. A green arrow points from the 'dots' icon in the tooltip to a box labeled 'To Export'.

Min	Midpoint	Max	Comp Ra
1,549...	\$ 55,399...	\$ 69,248...	102.90

To Export



A screenshot of an Anaplan grid header. The header has five columns: 'Amount', 'FY27 Proposed Budget', 'Not Budget?', 'Comments', and 'Notification'. Below the header, the first row of data is visible with values: '-', '\$ 40,000', an empty checkbox, and empty cells for 'Comments' and 'Notification'. A tooltip is open above the grid, showing various icons for refresh, refresh, filter, sort, visibility, list view, and a 'dots' icon. A green arrow points from the 'dots' icon in the tooltip to a box labeled 'To Export'.

Amount	FY27 Proposed Budget	Not Budget?	Comments	Notification
-	\$ 40,000	<input type="checkbox"/>		

Personnel Planning

Personnel Input Page

The PP01 Position Planning Budget Input page is where all information will be entered related to salary and position budgets.

Click on the dropdown on the top right to select a department. The list of employees will populate in the Position Selector section. Once an employee is selected, the various fields will populate accordingly. In the Compensation Information & Compensation Ratio section, merit and market columns are available for entry, to arrive at the FY27 Proposed Salary.

Position Planning - Budget Input

Selected Position Information | : - NOT Reviewed

Notification | :

Department: 2020-Office of Teaching & Learning

Eligibility Status: Eligible

Term: 12

FTE: 1

Position Selector

	Reviewed ?
00018803- [REDACTED]	<input type="checkbox"/>
00018931-VACANT	<input type="checkbox"/>
00021270- [REDACTED]	<input type="checkbox"/>
00022127-POOL	<input type="checkbox"/>
00023120-POOL	<input type="checkbox"/>
00023160-POOL	<input type="checkbox"/>
00023288-POOL	<input type="checkbox"/>
00026274- [REDACTED]	<input type="checkbox"/>
00026370-VACANT	<input type="checkbox"/>

Compensation Information & Compensation Ratio

	FY26 Salary	Promotion - Per Provost's Office	Merit	Market	FY27 Proposed Salary	Change Amount	% Change (excluding budget...)	Estimated Benefits	Total FY27 Compensa...	Min	Midpoint
00018803- [REDACTED]	\$ 80,082....	-	\$ 500.00	-	\$ 80,582....	\$ 500.00	0.62%	\$ 39,365	\$ 119,947		

Budget Information

Combo Code	Earn Code	Do Not Budget?	Distribution %	FY26 Budget	Promotion	Merit	Market	Change Budget Input	Change Budget	FY27 Proposed
------------	-----------	----------------	----------------	-------------	-----------	-------	--------	---------------------	---------------	---------------

To Export

This page also includes an Estimated Benefits amount; note that this calculation *does not* take into consideration years of service or income limits on percentage based benefits, and is only presented as a starting point to assist users in evaluating a fringe amount to budget for a fund or department.

PP01: Position Planning - Budget

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Apps | NDSU - Budget Planni... | Personnel Planning / PP01: Position Planning - Budget I... | North Dakota State University-Main Campus

PP01: Position Planning - Budget Input | DEV - Budget Planning | 2020-Office of Teaching & Learning

Selected Position Information | : - NOT Reviewed

Notification | :

Department: 2020-Office of Teaching & Learning

Eligibility Status: Eligible

Term: 12

FTE: 1

Position Selector

	Reviewed ?
00018803	<input type="checkbox"/>
00018931-VACANT	<input type="checkbox"/>
00021270	<input type="checkbox"/>
00022127-POOL	<input type="checkbox"/>
00023120-POOL	<input type="checkbox"/>
00023160-POOL	<input type="checkbox"/>
00023288-POOL	<input type="checkbox"/>
00026274	<input type="checkbox"/>
00026370-VACANT	<input type="checkbox"/>
00027558-GRAD	<input type="checkbox"/>

Comments Input

Compensation Information & Compensation Ratio

	FY26 Salary	Promotion - Per Provost's Office	Merit	Market	FY27 Proposed Salary	Change Amount	% Change (excluding budget...)	Estimated Benefits	Total FY27 Compensa...	Min	Midpoint
00018803	\$ 80,082....	-	-	-	\$ 80,082....	-	-	\$ 39,262	\$ 119,344		

Budget Information

	Combo Code	Earn Code	Do Not Budget?	Distribution %	FY26 Budget	Promotion	Merit	Market	Change Budget Input	Change Budget	FY27 Propo Bud
S3090020209000R	S309002...		<input type="checkbox"/>		\$ 68,249	-	-	-	-	-	\$ 68
S1870120209000R	S187012...		<input type="checkbox"/>		\$ 11,833	-	-	-	-	-	\$ 11

Click to Export

Scrolling to the right on this page, there are fields for the min, midpoint, and max salaries, as well as the compensation ratio. This information is presented for employees for which that information was received.

PP01: Position Planning - Budget

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Apps | NDSU - Budget Planni... | Personnel Planning / PP01: Position Planning - Budget I... | North Dakota State University-Main Campus

PP01: Position Planning - Budget Input | DEV - Budget Planning | 2020-Office of Teaching & Learning

Department: 2020-Office of Teaching & Learning

Eligibility Status: Eligible

Term: 12

Position Selector

	Reviewed ?
00018803	<input type="checkbox"/>
00018931-VACANT	<input type="checkbox"/>
00021270	<input type="checkbox"/>
00022127-POOL	<input type="checkbox"/>
00023120-POOL	<input type="checkbox"/>
00023160-POOL	<input type="checkbox"/>
00023288-POOL	<input type="checkbox"/>
00026274	<input type="checkbox"/>
00026370-VACANT	<input type="checkbox"/>
00027558-GRAD	<input type="checkbox"/>

Comments Input

Compensation Information & Compensation Ratio

00018803 - \$ 500.00 - \$ 80,582... \$ 500.00 0.62% \$ 39,365 \$ 119,947

Budget Information

Combo Code	Earn Code	Do Not Budget?	Distribution %	FY26 Budget	Promotion	Merit	Market	Change Budget Input	Change Budget	FY27 Prop Budget
S3090020209000R	S309002...	<input type="checkbox"/>		\$ 68,249	-	\$ 426	-	-	\$ 426	\$ 68,249
S1870120209000R	S187012...	<input type="checkbox"/>		\$ 11,833		\$ 74	-	-	\$ 74	\$ 11,833
00018803		<input type="checkbox"/>		\$ 80,082		\$ 500	-		\$ 500	\$ 80,082

The Budget Information grid includes the Combo Code, Earnings Code, and a 'Do Not Budget?' checkbox. If a particular row of funding should not be used for FY27, selecting that box will zero out the line.



Users can adjust the distribution percent in the 'Distribution %' column if needed. Salary increase columns will distribute the increases in proportion to the Current FY budget. Additional changes can be entered into the 'Change Budget Input' column.

The **Comments** field in the Budget Information section should be used to make comments on new funding sources, funding sources that will not be budgeted in the Next FY, and any other amounts in the Change Budget Input column.

The Comments box under the **Position Selector** should be used for comments related to the Compensation Information & Compensation Ratio section of the page.

2020-Office of Teaching & Learning

Eligible 12 1

Additional Insights Panel

Position Selector

	Reviewed ?
00018803-B [REDACTED]	<input type="checkbox"/>
00018933-VACANT	<input type="checkbox"/>
00021270-S [REDACTED]	<input type="checkbox"/>
00022127-POOL	<input type="checkbox"/>
00023120-POOL	<input type="checkbox"/>
00023160-POOL	<input type="checkbox"/>
00023283-POOL	<input type="checkbox"/>
00026274-O [REDACTED]	<input type="checkbox"/>
00026370-VACANT	<input type="checkbox"/>
00027558-GRAD	<input type="checkbox"/>

Comments Input

Budget Information

	Promotion - Per Provost's Office	Merit	Market	FY27 Proposed Salary	Change Amount	% Change (excluding budget...)	Estimated Benefits	Total FY27 Compensa...	Min	Midpoint	Max	Cor
00018803- [REDACTED]	-	\$ 500.00	-	\$ 80,582...	\$ 500.00	0.62%	\$ 39,365	\$ 119,947				

	Code	Do Not Budget?	Distribution %	FY26 Budget	Promotion	Merit	Market	Change Budget Input	Change Budget	Proposed Budget	Comments
S3090020209000R		<input type="checkbox"/>		\$ 68,249	-	\$ 426	-	-	\$ 426	\$ 68,675	
S1870120209000R		<input type="checkbox"/>		\$ 11,833	-	\$ 74	-	-	\$ 74	\$ 11,907	
00018803- [REDACTED]		<input type="checkbox"/>		\$ 80,082	-	\$ 500	-		\$ 500	\$ 80,582	

Open the Additional Insights Panel using the icon.

The panel includes a checkbox to show/hide reviewed positions, and a button to add a new funding source.

The first section in the Additional Insights panel is the **Show/Hide Selector**; if users would like to hide positions that have been checked as reviewed, select this checkbox.

The **Add New Distribution Line** should be used if a new Combo Code needs to be added to the Budget Information section for a position.

The Additional Insights panel also gives instructions on utilizing the page.

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Apps | NDSU - Budget Planni... | Personnel Planning / PP01: Position Planning - Budget I... | North Dakota State University-Main Campus

PP01: Position Planning - Budget Input | DEV - Budget Planning | 2000-Office of the Provost | Reset

Position Planning - Budget Input

Selected Position Information | : - NOT | Notification | :

Department: 2000-Office of the Provost

Eligibility Status: Eligible

Term: 12

FTE: 1

Position Selector

	FY26 Salary	Promotion - Per Provost's Office	Merit	Market	FY27 Proposed Salary	Change Amount	% Change (excluding budget...	Estimated Benefits
00020345	\$ 87,430....	-	-	-	\$ 87,430....	-	-	\$ 40,777

Budget Information

Count 13 | Min 0.0 | Max 87430.0 | Average 19430.33333333332 | Sum

Additional Insights

Show / Hide Selector

Hide Reviewed Positions ?

Action

+ Add New Distribution Line

Instruction

Use this page to review and manage position and distributions details.

1. Navigate & Select

- Department:** Use the page selector at the top to filter for a specific department.
- Position:** Click a row in the **Position Selector Grid** to load its details into the other grids on the page.

2. Review Information

- Compensation:** View detailed data in the **Compensation Information & Ratio** grid.
- Distributions:** View funding details in the **Budget Information** grid at the

Personnel Planning

Personnel Details

The PP02 Position Planning - **Detailed Budget Information** page can be used for review. Users are unable to edit information on this page and will need to return to the PP01 Position Planning - Budget Input page if there is an error.

NDSU NORTH DAKOTA STATE UNIVERSITY

Detailed Budget Information

Selected Department | : 2000-Office of the Provost

Position Distribution

	Acct Dept	Position Number	Eligibility Status	FY26 Salary	Promotion - Per Provost's Office	Merit	Market
00019544	2000-Office of the ...	00019544	Eligible	\$ 156,848...	-	-	-
00020345	2000-Office of the ...	00020345	Eligible	\$ 87,430...	-	-	-
00021249	2000-Office of the ...	00021249	Eligible	\$ 385,000...	-	-	-
00022532-POOL	2000-Office of the ...	00022532	Not Eligible	-	-	-	-
00023205-POOL	2000-Office of the ...	00023205	Not Eligible	-	-	-	-
00023257-GRAD	2000-Office of the ...	00023257	Not Eligible	-	-	-	-
00024391-POOL	2000-Office of the ...	00024391	Not Eligible	-	-	-	-
00026645	2000-Office of the ...	00026645	Eligible	\$ 72,899...	-	-	\$ 72,899...
00028335	2000-Office of the ...	00028335	Eligible	\$ 51,677...	-	-	\$ 51,677...
00101016-TEMP	2000-Office of the ...	00101016	Not Eligible	-	-	-	-
00101037	2000-Office of the ...	00101037	Eligible	\$ 118,367...	-	-	\$ 118,367...

Additional Insights

Attention:
This is a **review-only** page. All data entry must be performed on the **Input Page**.

Compensation Ratio

Min

Midpoint

Max

Comp Ratio

2000-Office of the Provost

Budget Information

Once an employee is selected, the Additional Insights panel Compensation Ratio fields will populate.

To view funding distribution for a position, click on the Budget Information selector; this will open an additional grid, shown on the next slide.

The budget information for the selected position will be displayed once Budget Information is selected in the Additional Insights panel.

The size of the Position Distribution and Budget Information sections can be changed by using a slider in the middle of the page.

PP02: Position Planning - Detailed Budget Information

DEV - Budget Planning

2000-Office of the Provost

Selected Department | : 2000-Office of the Provost

Position Distribution

Count	Min	Max	Average	Sum
13	0.0	385000.0	85557.0	770013.0

Budget Information

Earn Code	Combo Code	Distribution %	Do Not Budget?	FY26 Budget	Promotion	Merit	Market	Change Budget Input	FY27 Proposed Budget
S305102000R	S305102000R		<input type="checkbox"/>	\$ 385,000	-	-	-	-	\$ 385,000
00021249			<input type="checkbox"/>	\$ 385,000	-	-	-	-	\$ 385,000

Additional Insights

Attention:
This is a **review-only** page. All data entry must be performed on the **Input Page**.

Compensation Ratio

Min

Midpoint

Max

Comp Ratio

Budget Information

Personnel Planning

Department Summary

The PP03 Position Planning Department Summary displays various metrics related to position planning.

Position Count

- Permanent: 8
- Temporary: 2
- Pool: 4

Eligibility

Eligible	Not Eligible	Total
8	2	10

Market	Budget Change Only	FY27 Funding Source Budget	Change Amount	% Change
\$ 500	-	\$ 1,713,934	\$ 500	0.03%
-	-	\$ 76,060	-	
\$ 500	-	\$ 1,789,994	\$ 500	0.03%

Summary Metrics:

- Total FTE: 10.8
- FY26 Total Budget: \$ 1,789,494
- FY27 Total Budget: \$ 1,789,994
- % Change: 0.03%

Summary Bar: Count 13 | Min 0.0 | Max 385000.0 | Average 85557.0 | Sum 770013.0

The Position Count information is related to the number of positions in the selected department/division. This will not match the Total FTE as temporary and pool positions are included in the position count but not the FTE.

The FY26 and FY27 Total Budget amounts are for all funding sources.

The Funding Sources section shows the changes made during the Salary planning process for each fund type. Grants are included in the Restricted fund type.

The Funding Source Totals shows the totals by fund and fund type for the Current Year, Next Fiscal Year and a Percent change. Grants will show for the fund and not the project.

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Apps ▾ NDSU - Budget Plan... ▾ Personnel Planning / PP03: Position Planning - Departm... ▾ North Dakota State University-Main Campus ▾

PP03: Position Planning - Department Summary DEV - Budget Planning 2000-Office of the Provost Reset

	Source Budget	Provost's Office	Only	Source Budget		
Eligible	\$ 1,713,434	-	\$ 500	-	\$ 1,713,934	\$ 500 0.03%
Not Eligible	\$ 76,060	-	-	-	\$ 76,060	-
Total	\$ 1,789,494	-	\$ 500	-	\$ 1,789,994	\$ 500 0.03%

% Change **0.03%**

FY27 Funding Sources

Funding Sources

	Unrestricted-Local	Unrestricted - Appropriated	Total Funds
FY26 Funding Source Budget	\$ 50,908	\$ 1,738,586	\$ 1,789,494
Promotion - Per Provost's Office	-	-	-
Merit	-	\$ 500	\$ 500
Market	-	-	-
Budget Change Only	-	-	-
FY27 Funding Source Budget	\$ 50,908	\$ 1,739,086	\$ 1,789,994
Change Amount	-	\$ 500	\$ 500
% Change		0.03%	0.03%

Budget Information (Shows Department Positions Only)

Eligibility status	Final Distribution %	FY26 Budget	Promotion	Merit	Market	Change Budget Input	FY27 Proposed Budget	Change Amount	% Change	Comments
Count 13 Min 0.0 Max 385000.0 Average 85557.0 Sum 770013.0										

The Budget Information section shows the funding sources for a position, the Current Fiscal Year budget, increases applied, the New Fiscal Year budget and the % change. The information displayed is only for the department/division selected and will not show funding from other departments/divisions.

The Budget Information section shows the funding sources for a position, the Current Fiscal Year budget, increases applied, the New Fiscal Year budget and the % change. The information displayed is only for the department/division selected and will not show funding from other departments/divisions.

PP03: Position Planning - Departm

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Apps NDSU - Budget Plan... Personnel Planning / PP03: Position Planning - Departm... North Dakota State University-Main Campus

PP03: Position Planning - Department Summary DEV - Budget Planning 2000-Office of the Provost Reset

Unrestricted - Appropriated: \$

Change Amount

% Change 0.03% 0.03%

Budget Information (Shows Department Positions Only)

	Eligibility status	Final Distribution %	FY26 Budget	Promotion	Merit	Market	Change Budget Input	FY27 Proposed Budget	Change Amount	% Change	Comments
00020345-		100%	\$ 87,430	-	-	-	-	\$ 87,430	-		
S305102000R	Eligible	100%	\$ 385,000	-	-	-	-	\$ 385,000	-		
00021249		100%	\$ 385,000	-	-	-	-	\$ 385,000	-		
S3051020000	Not Eligible		-	-	-	-	-	-	-		
S472002834FAR00388440	Not Eligible		-	-	-	-	-	-	-		
S3051020000	Not Eligible		-	-	-	-	-	-	-		
00022532-POOL			-	-	-	-	-	-	-		
S305192000G	Not Eligible	34.19%	\$ 20,000	-	-	-	-	\$ 20,000	-		
S305102000G	Not Eligible	21.37%	\$ 12,500	-	-	-	-	\$ 12,500	-		
S1890220000	Not Eligible	1.709%	\$ 1,000	-	-	-	-	\$ 1,000	-		
S183982000T	Not Eligible	42.74%	\$ 25,000	-	-	-	-	\$ 25,000	-		
00023205-POOL		100%	\$ 58,500	-	-	-	-	\$ 58,500	-		
S305102000G	Not Eligible		-	-	-	-	-	-	-		
00023257-GRAD			-	-	-	-	-	-	-		
S1857620000	Not Eligible	100%	\$ 5,000	-	-	-	-	\$ 5,000	-		
00024391-POOL		100%	\$ 5,000	-	-	-	-	\$ 5,000	-		
S301212000R	Eligible	100%	\$ 72,899	-	-	-	-	\$ 72,899	-		

Count 13 Min 0.0 Max 385000.0 Average 85557.0 Sum 770013.0

The final grid presents the total funding source by fund/fund type and compares the current year with the budgeted year.

PP03: Position Planning - Department Summary

2000-Office of the Provost

Funding Source Totals

	FY26 Funding Source Budget	FY27 Funding Source Budget	Change Amount
18398-VP Academic Affairs Local Fund	\$ 25,000	\$ 25,000	-
18576-Immigration Advising	\$ 24,908	\$ 24,908	-
18902-Academic Programs	\$ 1,000	\$ 1,000	-
Unrestricted-Local	\$ 50,908	\$ 50,908	-
30121-Faculty Affairs	\$ 591,387	\$ 591,387	-
30510-Vice Presidents Office-Academi	\$ 962,199	\$ 962,699	\$ 500
30519-Faculty Development VPAA	\$ 20,000	\$ 20,000	-
30523-Provost Initiatives One-time	\$ 165,000	\$ 165,000	-
Unrestricted - Appropriated	\$ 1,738,586	\$ 1,739,086	\$ 500
Total Funds	\$ 1,789,494	\$ 1,789,994	\$ 500

Count 13 Min 0.0 Max 385000.0 Average 85557.0 Sum 770013.0

Non-Personnel Planning

Budget Input Page

The NP01 - Non-personnel Budget Input Page is where all information will be entered for revenue and operating budgets. The account dropdown will allow users to select the account(s) to be viewed. Ex. Select Net Accounts for all account codes, Revenues for revenues, Expenses for expenses or a specific account. The department dropdown will allow users to select the department(s) to be viewed. The top grid will populate based on the selectors.

Net Accounts | 2080-Library

Find... | Not recommended; use filter function instead

To Filter | Click to Export

	Dept ID	Fund	Fund Code	Project	FY25 Actuals	FY26 YTD Actuals	FY26 Budget	Target	Chan
400000-REVENUE	2080	18051-Lbr Lost Book & Materia...	18051		-	-	\$ 2,000	\$ 2,000	
441000-Fines-Forfeitures-Escheat	2080	18051-Lbr Lost Book & Materia...	18051		-\$ 1,725	-	\$ 500	\$ 500	
462000-Charges for Services/Sales	2080	18051-Lbr Lost Book & Materia...	18051		\$ 3,331	\$ 3,037	\$ 500	\$ 500	
Revenues	2080	18051-Lbr Lost Book & Materi...	18051		\$ 1,606	\$ 3,037	\$ 3,000	\$ 3,000	

Summary Reconciliation

		FY25 Actuals	FY26 YTD Actuals	FY26 Budget	Target	FY27 Proposed Budget	Variance %
18051-Lbr Lost Book & Material Fine	Revenues	\$ 1,606	\$ 3,037	\$ 3,000	\$ 3,000	\$ 3,000	0%
	Expenses	\$ 2,108	\$ 766	\$ 3,000	\$ 3,000	\$ 3,000	0%
	Net Accounts	-\$ 502	\$ 2,272	-	-	-	0%
18815-Library Fee	Revenues	\$ 1,367,951	\$ 1,316,912	\$ 1,441,515	\$ 1,441,515	\$ 1,441,515	0%
	Expenses	\$ 1,156,920	\$ 1,109,707	\$ 1,441,515	\$ 1,441,515	\$ 1,441,515	0%
	Net Accounts	\$ 211,031	\$ 207,205	-	-	-	0%
18916-Library Local	Revenues	\$ 14,857	\$ 544	\$ 2,985	\$ 2,985	\$ 2,985	0%
	Expenses	\$ 3,783	\$ 137	\$ 2,985	\$ 2,985	\$ 2,985	0%
	Net Accounts	\$ 11,073	\$ 407	-	-	-	0%
18919-Institute Photo Services	Revenues	\$ 5,529	\$ 2,668	\$ 5,830	\$ 5,830	\$ 5,830	0%
	Expenses	\$ 4,666	\$ 1,110	\$ 5,830	\$ 5,830	\$ 5,830	0%

Global Filters

- Show All Accounts?
- Show All Applicable Funds?
- Show All Applicable Projects?

Funds Type Filter

Funds Filter (Overrides Fund ty...

Filter functionality is accessed by using the filter 'funnel' icon, and can be used on any column that has a title in the green header row. It is recommended to use this filter functionality instead of the search bar in the main grid area; the filter function is especially helpful when a user would like to see a fund that has more than one department associated with it.

The upper grid shows FY25 Actuals, FY26 YTD Actuals, FY26 Budget, and the Target for FY27; often the FY26 Budget and the Target will be the same.

The screenshot displays the Anaplan budgeting interface for 'NP01 - Non-Personnel Budget Input Page'. The main grid shows budget data for various departments and funds. The columns include Dept ID, Fund, Fund Code, Project, FY25 Actuals, FY26 YTD Actuals, FY26 Budget, and Target. A green circle highlights the 'eye' icon in the toolbar, which opens a 'Show / Hide' menu. This menu has 'L2 Accounts' selected. Another 'Show / Hide' menu is open on the right, showing 'L2 Accounts' selected under the 'Levels' section. A 'Summary Reconciliation' table is visible at the bottom.

	FY25 Actuals	FY26 YTD Actuals	FY26 Budget	Target	FY27 Proposed Budget	Variance %
Revenues	\$ 1,606	\$ 3,037	\$ 3,000	\$ 3,000	\$ 3,000	0%
Expenses	\$ 2,108	\$ 766	\$ 3,000	\$ 3,000	\$ 3,000	0%
18051-Lbr Lost Book & Material Fine						

If users would like to view or export this grid without the subtotals, select the show/hide 'eye' icon, then select L2 Accounts. Update the checkboxes so only L2 Accounts is selected, and Apply. To reinstate the subtotals, check all three boxes, and Apply.

PeopleSoft FIN as the FY27 budget. Users may enter in **either the Change % or the Change Amount** column to update the dollar amount in a given row; please enter only round numbers. If a change is entered that results in a negative FY27 Proposed Budget amount, an error notification will appear and the amount will need to be corrected.

The screenshot displays the 'NP01 - Non-Personnel Budget Input Page' in the PeopleSoft application. At the top, there are navigation menus for 'Apps', 'NDSU - Budget Plan...', and 'Non-Personnel Budget / NP01 - Non-Personnel Budget I...'. The user is logged in as 'North Dakota State University-Main Campus'. Two dropdown menus are highlighted with red circles: 'Net Accounts' (set to '2080-Library') and 'Additional insights'. Below these is a search bar and a 'Reset' button. The main grid contains budget items with columns for 'is', 'FY26 YTD Actuals', 'FY26 Budget', 'Target', 'Change %', 'Change Amount', 'FY27 Proposed Budget', 'Not Budget?', 'Comments', and 'Notification'. The 'Change %' and 'Change Amount' columns are highlighted with a red circle. Below the grid is a 'Funds Type Filter' panel with a search bar and a table of filter options: 'Restricted', 'Unrestricted-Local', and 'Unrestricted - Appropriated'. To the right is an 'Additional Insights' panel with sections for 'Instruction', 'Global Filters', 'Funds Type Filter', and 'Funds Filter (Overrides Fund ty...'. The 'Show All Applicable Funds?' checkbox is checked and highlighted with a red circle. The 'Funds Type Filter' section is also highlighted with a red circle.

The Additional Insights panel contains additional filtering options, as well as the ability to add an account to a given fund/department combination.

By default, all funds are displayed in the main grid (based on the drop-down selector).

To see only a particular fund type, uncheck the Show All Applicable Funds? box, open the Fund Type Filter grid, then select the fund type that the user would like to see presented.

If a fund or account should not be budgeted in the New Fiscal year use the **"Not Budgeted?" checkbox**.

Comments should be entered to explain why the checkbox was selected, explain unusual amounts or changes, where transfers in/out are coming from/going to and any other relevant information.

To view only specific funds, **uncheck the Show All Applicable Fund?** box, **open the Funds Filter**, and select a fund or funds.

Note that if a fund is associated with many departments, it will be listed in the Funds Filter grid on many rows - one for each fund/department combination. **For those funds, it is recommended to use the filter functionality on the top grid instead.**

The screenshot displays a budget application interface. At the top, there is a search bar labeled 'Find...' and a 'Reset' button. Below this is a table with columns: 'is', 'FY26 YTD Actuals', 'FY26 Budget', 'Target', 'Change %', 'Change Amount', 'FY27 Proposed Budget', 'Not Budget?', 'Comments', and 'Notification'. The table contains several rows of budget data, including '512000-Salaries - Other', '514000-Overtime', '516000-Fringe Benefits', '517000-Salaries - Graduate Assistants', '521000-Travel', '531000-Supplies - IT Software', and '532000-Supply/Material - Professional'. A yellow arrow points from the text above to the filter icon in the table's toolbar.

Below the main table is a 'Funds Filter (Overrides Fund type Selection)' dialog box. It has a search bar and a table with columns for department names and a 'Show Fund?' checkbox. The department names listed include '2080-Library' and various library-related funds like '79715-Architectural Studies Library', '18051-Lbr Lost Book & Material Fine', etc.

On the right side of the interface is a sidebar with filter options. Under 'Global Filters', there are checkboxes for 'Show All Accounts?' (unchecked), 'Show All Applicable Funds?' (checked), and 'Show All Applicable Projects?' (checked). Below this are sections for 'Funds Type Filter', 'Funds Filter (Overrides Fund ty...', 'Project Filter', and 'Summary Reconciliation'.

To view only specific projects, **uncheck the Show All Applicable Projects?** box, **open the Project Filter**, and select one or more projects.

NP01 - Non-Personnel Budget Input Page

DEV - Budget Planning

Net Accounts: 2080-Library

		FY26 YTD Actuals	FY26 Budget	Target	Change %	Change Amount	FY27 Proposed Budget	Not Budget?	Comments	Notification
512000-Salaries - Other	9	\$ 5,049	\$ 17,000	\$ 17,000	-	-	\$ 17,000	<input type="checkbox"/>		
514000-Overtime	-	\$ 321	-	-	-	-	-	<input type="checkbox"/>		
516000-Fringe Benefits	0	\$ 12,413	\$ 15,400	\$ 15,400	-	-	\$ 15,400	<input type="checkbox"/>		
517000-Salaries - Graduate Assistants	4	-	\$ 12,000	\$ 12,000	-	-	\$ 12,000	<input type="checkbox"/>		

Summary Reconciliation

		FY25 Actuals	FY26 YTD Actuals	FY26 Budget	Target	FY27 Proposed Budget	Variance %
18051-Lbr Lost Book & Material Fine	Revenues	\$ 1,606	\$ 3,037	\$ 3,000	\$ 3,000	\$ 3,000	0%
	Expenses	\$ 2,108	\$ 766	\$ 3,000	\$ 3,000	\$ 3,000	0%
	Net Accounts	-\$ 502	\$ 2,272	-	-	-	0%
18815-Library Fee	Revenues	\$ 1,367,951	\$ 1,316,912	\$ 1,441,515	\$ 1,441,515	\$ 1,441,515	0%
	Expenses	\$ 1,156,920	\$ 1,109,707	\$ 1,441,515	\$ 1,441,515	\$ 1,441,515	0%
	Net Accounts	\$ 211,031	\$ 207,205	-	-	-	0%
18916-Library Local	Revenues	\$ 14,857	\$ 544	\$ 2,985	\$ 2,985	\$ 2,985	0%
	Expenses	\$ 3,783	\$ 137	\$ 2,985	\$ 2,985	\$ 2,985	0%
	Net Accounts	\$ 11,073	\$ 407	-	-	-	0%
18919-Institute Photo Services	Revenues	\$ 5,529	\$ 2,668	\$ 5,830	\$ 5,830	\$ 5,830	0%
	Expenses	\$ 1,666	\$ 440	\$ 5,830	\$ 5,830	\$ 5,830	0%

Global Filters

- Show All Accounts?
- Show All Applicable Funds?
- Show All Applicable Projects?

Funds Type Filter

Funds Filter (Overrides Fund ty...

Project Filter

Summary Reconciliation

Open the **Summary Reconciliation** grid by selecting it in the Additional Insights panel.

This grid presents a roll up of the revenues, expenses, and the net, by fund, for funds associated with the dropdown selection.

FY25 Actuals, FY26 YTD Actuals, Target, and the FY27 Proposed Budget are shown. The Variance % column shows the change from the FY27 Budget to the FY27 Proposed Budget.

Non-Personnel Planning

Proposed Budget Summary

The NP02 - Non-Personnel Budget Summary page will display various metrics related to the department/division and fund type used in the selectors on the top of the page.

The first six 'cards' are broken out between revenues and expenses, and compare the Proposed Budget to the Current Year Budget, showing the change in both dollars and percentages.

The screenshot displays the 'NP02 - Non-Personnel Budget Summary' page. The top navigation bar includes 'Apps', 'NDSU - Budget Plan...', and 'Non-Personnel Budget / NP02 - Non-Personnel Budget ...'. The main header shows 'NDSU UNIVERSITY BUDGET AND RESOURCE PLANNING' and 'Proposed Budget Summary'. Below this, the 'Selected Department Hierarchy Item | : AA Directorates' is indicated. The page features six data cards in a 2x3 grid:

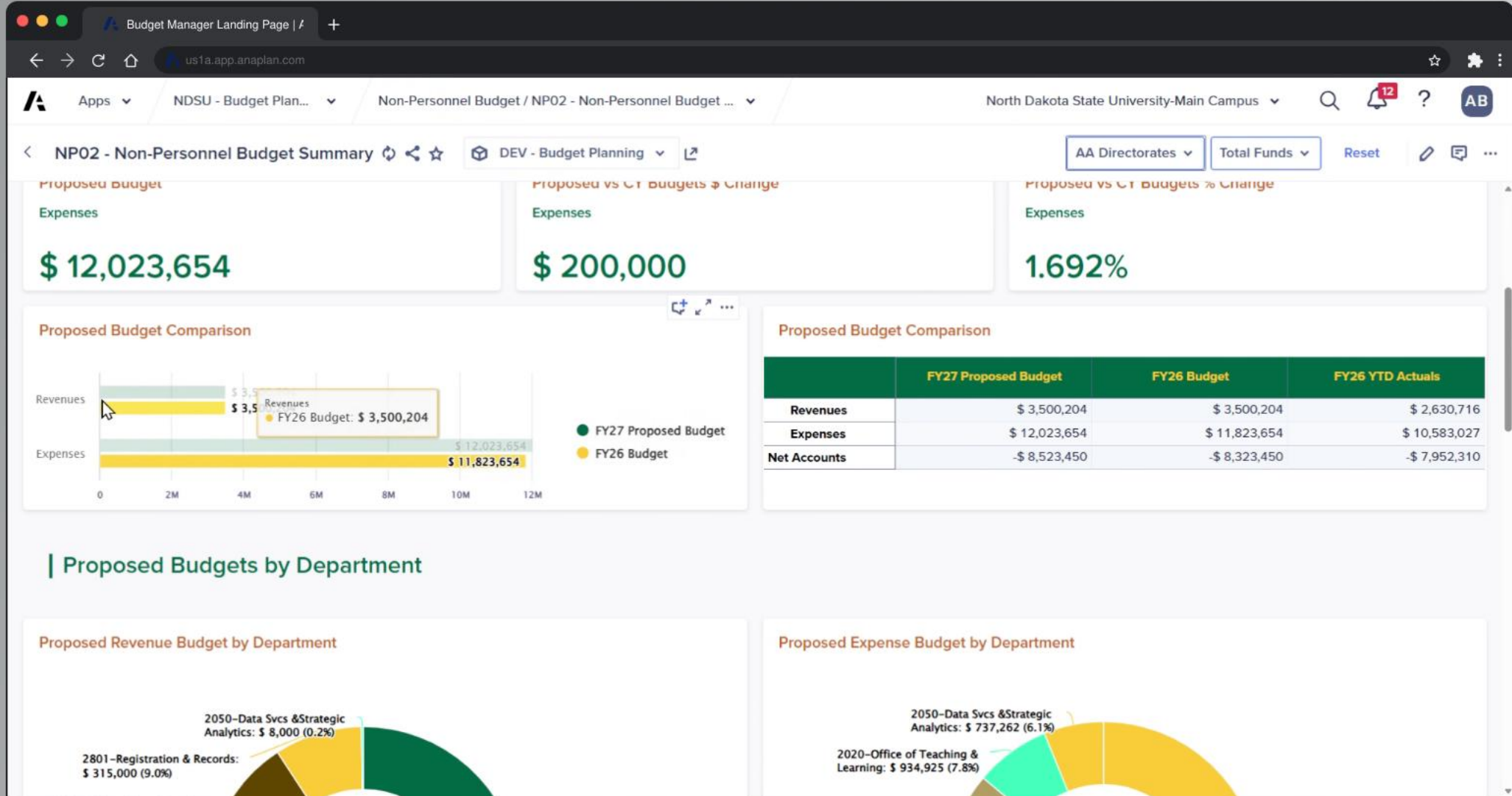
Category	Proposed Budget	Proposed vs CY Budgets \$ Change	Proposed vs CY Budgets % Change
Revenues	\$ 3,500,204	-	0%
Expenses	\$ 12,023,654	\$ 200,000	1.692%

At the bottom, there are two 'Proposed Budget Comparison' sections. The left one shows a bar chart for Revenues with a value of \$ 3,500,204. The right one shows a table with columns for 'FY27 Proposed Budget', 'FY26 Budget', and 'FY26 YTD Actuals'.

To Export

To access **export** functionality, select the 'dots' icon.

The same year-to-year comparison is shown next, but in graph and grid formats.



Next, the graphs present Proposed Revenue and Expense Budgets by each department, based upon the selection in the dropdowns at the top of the page. Users can hover over any section to show the information as a pop-out box.

The screenshot displays the 'NP02 - Non-Personnel Budget Summary' page. At the top, there are navigation elements including 'Apps', 'NDSU - Budget Plan...', and 'Non-Personnel Budget / NP02 - Non-Personnel Budget ...'. The page title is 'NP02 - Non-Personnel Budget Summary' with filters for 'AA Directorates' and 'Total Funds'. A horizontal bar chart compares 'Expenses' for 'FY27 Proposed Budget' (green bar, \$12,023,654) and 'FY26 Budget' (yellow bar, \$11,823,654). To the right, a table shows 'Expenses' and 'Net Accounts' for three periods: \$12,023,654 / -\$8,523,450; \$11,823,654 / -\$8,323,450; and \$10,583,027 / -\$7,952,310.

Proposed Budgets by Department

Proposed Revenue Budget by Department

Department	Amount	Percentage
2080-Library	\$ 1,634,784	46.7%
2802-Career and Advising Center	\$ 1,022,729	29.2%
2020-Office of Teaching & Learning	\$ 519,691	14.8%
2801-Registration & Records	\$ 315,000	9.0%
2050-Data Svcs & Strategic Analytics	\$ 8,000	0.2%

Proposed Expense Budget by Department

Department	Amount	Percentage
2080-Library	\$ 5,773,783	48.0%
2803-Academic Advising Center	\$ 1,542,107	12.8%
2802-Career and Advising Center	\$ 1,283,660	10.7%
2020-Office of Teaching & Learning	\$ 934,925	7.8%
2050-Data Svcs & Strategic Analytics	\$ 737,262	6.1%

Export a chart

Scrolling further down, Proposed Revenue and Expense Budgets are shown by account code.

The screenshot displays the Anaplan Budget Manager interface for the 'NP02 - Non-Personnel Budget Summary'. The page includes navigation elements like 'Apps', 'NDSU - Budget Plan...', and 'Non-Personnel Budget / NP02 - Non-Personnel Budget ...'. It also shows filters for 'AA Directorates' and 'Total Funds', along with a 'Reset' button. Two budget summary cards are visible: '2802-Career and Advising Center: \$ 1,022,729 (29.2%)' and '2801-Registration & Records: \$ 1,751,917 (14.6%)'. Below these is a section titled 'Proposed Budgets by Account Code' with a mouse cursor pointing to it. This section contains two donut charts: 'Proposed Revenue Budget by Account Code' and 'Proposed Expense Budget by Account Code'. The revenue chart shows major categories like Tuition and Fees (55.6%), Charges for Services/Sales (25.9%), and REVENUE (13.4%). The expense chart shows Salaries-Regular-Benefitted (56.3%), Supply/Material-Professional (26.9%), and Fringe Benefits (3.3%).

Proposed Budgets by Account Code

Proposed Revenue Budget by Account Code

Account Code	Description	Amount	Percentage
490000	Transfers In	\$ 12,000	0.3%
441000	Fines-Forfeitures-Eschat	\$ 500	0.0%
478000	Contributions & Donations	\$ 163,367	4.7%
400000	REVENUE	\$ 469,007	13.4%
462000	Charges for Services/Sales	\$ 907,230	25.9%
460000	Tuition and Fees	\$ 1,947,400	55.6%

Proposed Expense Budget by Account Code

Account Code	Description	Amount	Percentage
512000	Salaries - Other	\$ 183,775	1.5%
621000	Operating Fees and Services	\$ 250,099	2.1%
516000	Fringe Benefits	\$ 399,997	3.3%
535000	Miscellaneous Supplies	\$ 422,452	3.5%
532000	Supply/Material - Professional	\$ 3,231,886	26.9%
511000	Salaries-Regular - Benefitted	\$ 6,764,711	56.3%

Next, a listing of funds is presented and shows Proposed Budget Revenues, Expenses, and Net (Revenues – Expenses). As with most areas, this grid can be exported using the indicated icon.

Budget Manager Landing Page | /
 us1a.app.anaplan.com
 NDSU - Budget Plan... Non-Personnel Budget / NP02 - Non-Personnel Budget ... North Dakota State University-Main Campus
 NP02 - Non-Personnel Budget Summary DEV - Budget Planning AA Directorates Unrestricted-Local Reset

Funding Source Details

	FY27 Proposed Budget		Net Revenues-Expenses
	Revenues	Expenses	Net Accounts
18817-RR VA Certification Processing	\$ 8,000	\$ 8,000	-
18916-Library Local	\$ 2,985	\$ 2,985	-
18919-Institute Photo Services	\$ 5,830	\$ 5,830	-
18921-Library - Germans From Russia	\$ 105,049	\$ 105,049	-
18964-IDCs Gateways-ND for OTL	\$ 4,179	\$ 4,179	-
19045-IDCs School of Education-CR	\$ 1,050	\$ 1,050	-
19081-Governor's School	\$ 2,849	\$ 2,849	-
19131-Student Record	\$ 307,000	\$ 308,930	-\$ 1,930
19365-Career Service Fee	\$ 603,923	\$ 603,923	-
19366-Career Center Events	\$ 408,806	\$ 408,806	-
20004-Lib Foundation Gifts-Operating	\$ 46,405	\$ 46,405	-
20005-Library Shott Fund	\$ 20,000	\$ 20,000	-
20006-Lib Foundation Gifts-Materials	\$ 10,000	\$ 10,000	-
20066-CAC - Foundation	\$ 10,000	\$ 10,000	-
Unrestricted-Local	\$ 3,500,204	\$ 3,431,710	\$ 68,494

Count 3 Min 68494.0 Max 3500204.0 Average 2333469.3333333333 Sum 7000408.0

Non-Personnel Planning

Budget vs Actuals

The **NP04 Budget vs. Actuals** page will display the FY26 Budget, FY26 Year to Date (YTD) Actuals, FY27 Proposed Budget and the Budget Variance by dollar and percentage for the department/division, account level and fund type selected in the dropdowns at the top of the page.

			FY26 Budget	FY26 YTD Actuals	FY27 Proposed Budget	Budget Variance Amount	Budget Variance %
1200-Athletics	30213-Athletics	511000-Salaries-Regular - B...	\$ 2,164,241	\$ 1,540,614	\$ 2,164,247	\$ 6	0.0003%
		516000-Fringe Benefits	-	\$ 681,936	-	-	-
		Expenses	\$ 2,164,241	\$ 2,222,549	\$ 2,164,247	\$ 6	0.0003%
		Net Accounts	-\$ 2,164,241	-\$ 2,222,549	-\$ 2,164,247	-\$ 6	0.0003%
	Unrestricted - Appropriated	511000-Salaries-Regular - B...	\$ 2,164,241	\$ 1,540,614	\$ 2,164,247	\$ 6	0.0003%
		516000-Fringe Benefits	-	\$ 681,936	-	-	-
		Expenses	\$ 2,164,241	\$ 2,222,549	\$ 2,164,247	\$ 6	0.0003%
		Net Accounts	-\$ 2,164,241	-\$ 2,222,549	-\$ 2,164,247	-\$ 6	0.0003%
Athletics	30213-Athletics	511000-Salaries-Regular - B...	\$ 2,164,241	\$ 1,540,614	\$ 2,164,247	\$ 6	0.0003%
		516000-Fringe Benefits	-	\$ 681,936	-	-	-
		Expenses	\$ 2,164,241	\$ 2,222,549	\$ 2,164,247	\$ 6	0.0003%
		Net Accounts	-\$ 2,164,241	-\$ 2,222,549	-\$ 2,164,247	-\$ 6	0.0003%
	Unrestricted - Appropriated	511000-Salaries-Regular - B...	\$ 2,164,241	\$ 1,540,614	\$ 2,164,247	\$ 6	0.0003%
		516000-Fringe Benefits	-	\$ 681,936	-	-	-
		Expenses	\$ 2,164,241	\$ 2,222,549	\$ 2,164,247	\$ 6	0.0003%
		Net Accounts	-\$ 2,164,241	-\$ 2,222,549	-\$ 2,164,247	-\$ 6	0.0003%