Add Accounts to Chart Strings

NUPlans Web
Add Accounts to Chart Strings

- During budget preparation, you may need to add accounts to the base chart strings in the Fund views of NUPlans Contributor.

Budget Preparation in NUPlans Contributor

Add Accounts in NUPlans Web

- Estimate Compensation
- Estimate Grant Expenses
- Estimate Fund Budgets
- Analyze Results
- Review Results
Add Accounts to Chart Strings

• Use the form named Add Account to String
  – Inside the Chart String Maintenance folder
  – On the form, you simply...
    • Specify the budget grouping and base chart string and...
    • Specify the account you would like to add
  – The form let’s you know if it’s already there, or if not, that it’s okay to add.

• If you add a salary account...
  – The related benefits account is also added automatically... if it is not already there.
Base versus Full Chart String

ChartField Maintenance staff and Budget Office staff can:

• Add new base chart strings (c/s)
  – For your budget group(s)
  – With a starter set of account codes
  – Via the normal c/s setup process
• New base chart strings appear in NUPlans Contributor the next day after entry

NUPlans users can:

• Add accounts to c/s
  – Appear in NUPlans Contributor immediately
  – Base c/s plus account is commonly called a “full chart string”
Demonstration

ADD ACCOUNT TO CHART STRING
In this scenario, you see a salary account added to a chart string.

Users with the General role can access this form.

In this scenario, you see a salary account added to a chart string.
Add Account

- You may add an account in NUPlans.
- Accounts cannot be added if the budget grouping is locked or if you have view-only access to the budget grouping.
- Accounts are added immediately and cannot be deleted.
- Benefit accounts will be created for salary accounts if necessary.
- You will receive an email when your account addition is successful.

1. Click double arrows to select budget grouping.
2. Click cells to select from dropdown menus.
3. Review string and status.
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Click the double arrows to select a Budget Grouping.
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2. Click cells to select from dropdown menus.
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**Clear Form**

All Budget Groupings to which you have access appear in this list. Select one and click OK.
Click into the Chart String cell and select the base chart string from the dropdown menu.
Click in the Account cell and select the account from the dropdown menu. You can click into the list and type the account number or scroll to it.
Spot Check!

- Review the Proposed String and String Status.
- After you select the account number, NUPlans checks the chart string to see if the account does or does not already exist. You receive a message either way.
- If the String Status is “Does not Exist”, click Add Account at the bottom of the form.

1. Click double arrows to select budget grouping.

   Training 003 (TRAIN 003)

   172-1031001-10006067

   60103 - Secretarial-Clerical

2. Click cells to select from dropdown menu.

   172-1031001-10006067-60103

3. Review string and status.

   Does not Exist - Available to Add

4. If the status is ‘Does not Exist’, click to add account.

Add Account
Confirmation
Click OK to confirm you want to add the account.
Confirmation

• Click OK to the confirmation message.
• The String Status immediately updates to “chart string already exists”.
• You can click Clear Form to add another account.
Result in Contributor

- The account appears in Contributor immediately.
- If the corresponding benefits account does not already exist, NUPlans adds that as well.
Review

• Review chart strings in Contributor near the beginning of the budget preparation season.
• Add accounts that you will need in advance of budgeting.