

Change Chart String Status

NUPlans Web



NORTHWESTERN
UNIVERSITY

Change Chart String Status

- During budget preparation, you may want to change the status of a base chart string to prevent budget input and to indicate “Do Not Budget” the chart string in the coming year.

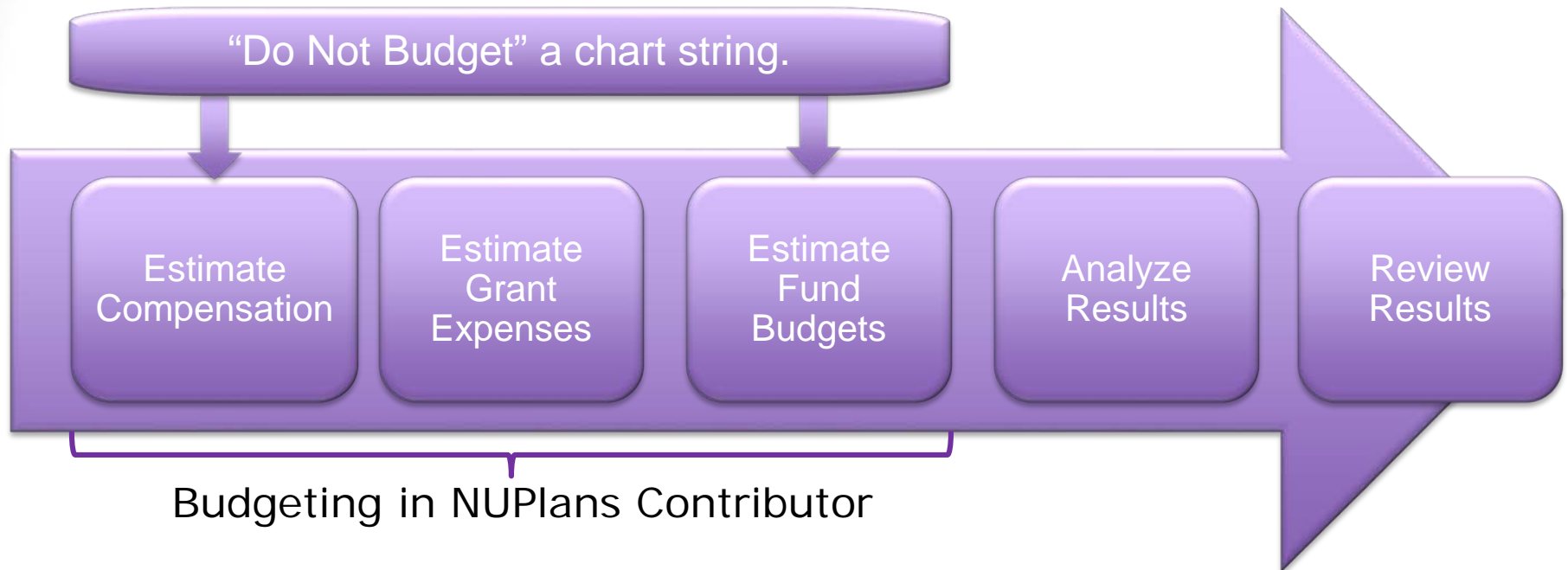


Chart String Status: Active or Do Not Budget

If you change a c/s status in NUPlans Web:

- Takes effect in NUPlans immediately
 - Prevents budget input in Contributor
- Takes effect in NUFin next year
 - Prevents creation of a budget on the c/s in NUFin next year

If you previously inactivated the c/s in NUFin:

- C/s may appear in NUPlans if a recent history exists of budget or actuals
- C/s must be reactivated in NUPlans if it should appear in next year's NUFin budget and Cognos reports



Example: Active Gift Project

Rows: Gifts [G_Fund] | G_ChartString_Full:Default [G_ChartString_Full] | Columns: Gift Measures [B_Budget_Info] | Context: Working Budget [G_Scenario] | Training 00 (FSM 900) [G_BudgetGrouping]

	FY10 Bud	FY11 Bud	FY12 Bud	FY12 Beg CFWD
320-1001001-30026370 Gift Project	0	0	0	0
320-1001001-30026370 Revenue	0	0	0	0
320-1001001-30026370-40301 Private Gifts -Unrestricted	0	0	0	0
320-1001001-30026370 Expense	0	0	0	0
320-1001001-30026370-73010 Paper And Office Supplies	0	0	0	0
320-1001001-30026370-75015 Professional Svcs-Reimbursment	0	0	0	0
320-1001001-30026370-76765 Domestic Travel-Transportation	0	0	0	0
320-1001001-30026370-78020 Tuition	0	0	0	0
320-1001001-30026370-78084 Purchsd Srvs Intrns & Resdnts	0	0	0	0
320-1001001-30026370-88205 NMT-To Unrestricted	0	0	0	0

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Good candidate for inactivation

Change Chart String Status

- Use the form named Change Chart String Status
 - Inside the Chart String Maintenance folder
 - On the form, you...
 - Specify the budget grouping and click Refresh...
 - Locate the chart string and specify the change in status
 - The result in Contributor is immediate.
- You can change the status back (revert) if needed.



Users with the General security role can access the Change Chart String Status form.

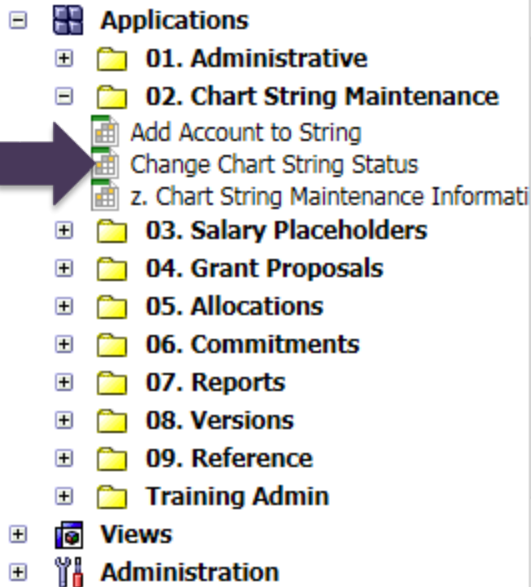
Annual Budgeting Training

- Expand the APPLICATIONS directory on the left to access NUPlans Web forms.
- You will only see forms you have access to, based on your access and roles listed on the right.
- If you think your access is incorrect, contact the appropriate individual:
[NUPlans System Access/Security Information](#)
[NUPlans Role Information](#)

Nightly Maintenance/Downtime

- NUPlans undergoes nightly maintenance from midnight - 7 a.m.
- Monthly maintenance occurs the Sunday after the second Tuesday of the month from 7 - 10 a.m.
- Attempts to use the system during maintenance windows may result in errors accessing NUPlans, as well as errors or lost data while budgeting.

In this scenario, you change the status of a Gift Project you saw on the previous slide.



Applications

- + 01. Administrative
- + 02. Chart String Maintenance
 - + Add Account to String
 - + Change Chart String Status
 - + z. Chart String Maintenance Information
- + 03. Salary Placeholders
- + 04. Grant Proposals
- + 05. Allocations
- + 06. Commitments
- + 07. Reports
- + 08. Versions
- + 09. Reference
- + Training Admin

Views

- + Administration

- Applications
 - 01. Administrative
 - 02. Chart String Maintenance
 - Add Account to String
 - Change Chart String Status
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Click to collapse the menu.

NUPlans Training | Change Chart String Stat... x

[Base]

Change Chart String Status

- A chart string with an NUPlans status of 'Do not budget' prevents a budget from being created within NUP
- A 'Do not budget' status will not affect the chart string in NUFinancials.
- Chart strings that are inactive or closed in NUFinancials cannot be activated in NUPlans.
- Chart string status changes are effective immediately in NUPlans.
- Status changes cannot be done if the budget grouping is locked or if you have view-only access to the budg

1. Click double arrows to select budget grouping.
2. Click to refresh chart strings.
3. Click 'Change Status' below to select a new status.
4. View status changes in the NUPlans column.

Training 001 (TRAIN 001)

Refresh

Chart String	NUFinancials	Change Status
110-1011001 Operations	Active	
110-1011002 Programs	Active	
160-1011003 Recharge Center	Active	
171-1011001-10006057 Faculty Project	Active	
171-1011001-10006069 Staffed Research Project	Active	
171-1011001-10006086 Faculty Project	Active	
171-1011001-10023274 Faculty Project	Active	
172-1011001-10006067 Consulting Project	Active	
172-1011001-10006074 Technical Project	Active	
172-1011001-10006081 Laboratory Project	Active	
172-1011001-10023117 Research Project	Active	
320-1011001-30010096 Small Recurring Gift	Active	

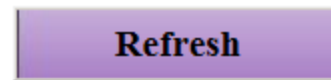
Change Chart String Status

- A chart string with an NUPlans status of 'Do not budget' prevents a budget from being created within NUPlans.
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- Chart strings that are inactive or closed in NUFinancials cannot be activated in NUPlans.
- Chart string status changes are effective immediately in NUPlans.
- Status changes cannot be done if the budget grouping is locked or if you have view-only access to the budget grouping.

1. Click double arrows to select budget grouping.



2. Click to refresh chart strings.



3. Click 'Change Status' below to select a new status.

Click the double arrows to select the Budget Grouping.

4. View status changes in the NUPlans column.

Chart String	NUFinancials	Change Status	NUPlans
110-1011001 Operations	Active		Active
110-1011002 Programs	Active		Active
160-1011003 Recharge Center	Active		Active
171-1011001-10006057 Faculty Project	Active		Active
171-1011001-10006069 Staffed Research Project	Active		Active
171-1011001-10006086 Faculty Project	Active		Active
171-1011001-10023274 Faculty Project	Active		Active
172-1011001-10006067 Consulting Project	Active		Active
172-1011001-10006074 Technical Project	Active		Active
172-1011001-10006081 Laboratory Project	Active		Active
172-1011001-10023117 Research Project	Active		Active
320-1011001-30010096 Small Recurring Gift	Active		Active

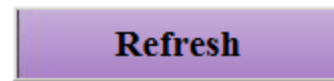
Change Chart String Status

- A chart string with an NUPlans status of 'Do not budget' prevents a budget from being created within NUPlans.
- A 'Do not budget' status will not affect the chart string in NUFinancials.
- Chart strings that are inactive or closed in NUFinancials cannot be activated in NUPlans.
- Chart string status changes are effective immediately in NUPlans.
- Status changes cannot be done if the budget grouping is locked or if you have view-only access to the budget grouping.

1. Click double arrows to select budget grouping.



2. Click to refresh chart strings.



Click Refresh to see all chart strings. Scroll down to see all.

3. Click 'Change Status' below to select a new status.

4. View status changes in the NUPlans column.

Chart String	NUFinancials	Change Status	NUPlans
110-1061001 Operations	Active		Active
110-1061002 Programs	Active		Active
160-1061003 Recharge Center	Active		Active
171-1061001-10006057 Faculty Project	Active		Active
171-1061001-10006069 Staffed Research Project	Active		Active
171-1061001-10006086 Faculty Project	Active		Active
171-1061001-10023274 Faculty Project	Active		Active
172-1061001-10006067 Consulting Project	Active		Active
172-1061001-10006074 Technical Project	Active		Active
172-1061001-10006081 Laboratory Project	Active		Active
172-1061001-10023117 Research Project	Active		Active
320-1061001-30010096 Small Recurring Gift	Active		Active

1. Click double arrows to select budget grouping.
2. Click to refresh chart strings.
3. Click 'Change Status' below to select a new status.
4. View status changes in the NUPlans column.

Training 006 (TRAIN 006) **Budget Grouping**

Refresh

Chart String	NUFinancials	Change Status	NUPlans
110-1061001 Operations	Active		Active
110-1061002 Programs	Active		Active
160-1061003 Recharge Center	Active		Active
171-1061001-10006057 Faculty Project	Active		Active
171-1061001-10006069 Staffed Research Project	Active		Active
171-1061001-10006086 Faculty Project	Active		Active
171-1061001-10023274 Faculty Project			
172-1061001-10006067 Consulting Project			
172-1061001-10006074 Technical Project			
172-1061001-10006081 Laboratory Project			
172-1061001-10023117 Research Project	Active		Active
320-1061001-30010096 Small Recurring Gift	Active		Active
320-1061001-30023200 Family Gift	Active		Active
320-1061001-30026370 Gift Project	Active		Active
450-1061001-40000465 Scholarship	Active		Active
450-1061001-40000658 Professorship	Active		Active
450-1061001-40000670 Trust	Active		Active
450-1061001-40004293 Department Endowment	Active		Active

Locate the chart string.

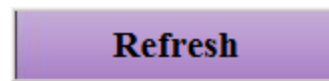
Click into the Change Status cell.



1. Click double arrows to select budget grouping.

Training 006 (TRAIN 006) Budget Grouping

2. Click to refresh chart strings.



3. Click 'Change Status' below to select a new status.

4. View status changes in the NUPlans column.

Chart String	NUFinancials	Change Status	NUPlans
110-1061001 Operations	Active		Active
110-1061002 Programs	Active		Active
160-1061003 Recharge Center	Active		Active
171-1061001-10006057 Faculty Project	Active		Active
171-1061001-10006069 Staffed Research Project	Active		Active
171-1061001-10006086 Faculty Project	Active		Active
171-1061001-10023274 Faculty Project	Active		Active
172-1061001-10006067 Consulting Project	Active		Active
172-1061001-10006074 Technical Project	Active		Active
172-1061001-10006081 Laboratory Project	Active		Active
172-1061001-10023117 Research Project	Active		Active
320-1061001-30010096 Small Recurring Gift	Active		Active
320-1061001-30023200 Family Gift	Active		Active
320-1061001-30026370 Gift Project	Active		Active
450-1061001-40000465 Scholarship	Active		Active
450-1061001-40000658 Professorship	Active		Active
450-1061001-40000670 Trust	Active		Active
450-1061001-40004293 Department Endowment	Active		Active

Select the new status.

Active
 Do not budget

1. Click double arrows to select budget grouping.
2. Click to refresh chart strings.
3. Click 'Change Status' below to select a new status.
4. View status changes in the NUPlans column.

Training 006 (TRAIN 006)  **Budget Grouping**

Refresh

Chart String	NUFinancials	Change Status	NUPlans
110-1061001 Operations	Active		Active
110-1061002 Programs	Active		Active
160-1061003 Recharge Center	Active		Active
171-1061001-10006057 Faculty Project	Active		Active
171-1061001-10006069 Staffed Research Project	Active		Active
171-1061001-10006086 Faculty Project	Active		Active
171-1061001-10023274 Faculty Project	Active		Active
172-1061001-10006067 Consulting Project	Active		Active
172-1061001-10006074 Technical Project	Active		Active
172-1061001-10006081 Laboratory Project	Active		Active
172-1061001-10023117 Research Project	Active		Active
320-1061001-30010096 Small Recurring Gift	Active		Active
320-1061001-30023200 Family Gift	Active		Active
320-1061001-30026370 Gift Project	Active	Do not budget	Do not budget
450-1061001-40000465 Scholarship	Active		Active
450-1061001-40000658 Professorship	Active		Active
450-1061001-40000670 Trust	Active		Active
450-1061001-40004293 Department Endowment	Active		Active

The new status is saved and takes affect immediately.



Result in Contributor

- In the Gifts view, the project columns are gray and un-enterable. The Status is “Do not budget.”
 - (except Notes)

Rows: Gifts [G_Fund] - All Chart Strings [G_ChartString_Base] >> 1

Columns: - Fund Input [B_Budget_Info]

Context: V1 - Budget Scenario 1 [G_Scenario] Training 006 (TRAIN 006) [G_BudgetGrouping]

	FY 16 Bud Input	Notes	Status	Fund	Department	Pr
Net	0			320	1031001	300
Total Revenue	0			320	1031001	300
Revenue	0			320	1031001	300
40301 - Private Gifts -Unrestricted	0		Do not budget	320	1031001	300
Total Expense	0			320	1031001	300
Non-Salary Expense	0			320	1031001	300
73010 - Paper And Office Supplies	0		Do not budget	320	1031001	300
75015 - Professional Svcs-Reimbursment	0		Do not budget	320	1031001	300
76765 - Domestic Travel-Transportation	0		Do not budget	320	1031001	300
78020 - Tuition	0		Do not budget	320	1031001	300
78084 - Purchsed Srvs Intrns & Resdnts	0		Do not budget	320	1031001	300

320-1031001-30026370 Gift Project

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Review

- NUPlans Web enables you to change the status of a base chart string.
 - You can change a c/s status to prevent budget input in NUPlans immediately and to prevent the creation of a budget on the c/s next year in NUFinancials.
 - You can reactivate a c/s if needed, or if you want to activate a c/s that was imported into NUPlans from NUFinancials with an inactive status.
- The effect is immediate in NUPlans Contributor.

