Weinberg College of Arts & Sciences:
Process Guide: Activating & Deactivating Chart String Project IDs  

Requesting a New Designated (Fund 171) Chart String:

WCAS department administrators may request designated (fund 171) project IDs in instances where it is necessary to track funding and expenses relating to a particular use within NUFinancials. Examples of funding that may necessitate designated projects* include WCAS-hosted conferences with multiple sources of funding, faculty URGC grants, graduate student research grants. Please follow steps below to set up a new chart string:

1. Prior to requesting a new project ID, verify that one does not already exist for the same purpose:  
   http://www.northwestern.edu/financial-operations/policies-procedures/coa/chartfindexistingcharts.html

2. Complete the Chartfield Project ID Request Form (see the WCAS Finance & Budget website for sample forms):
   (NUPortal -> Finance & Budget -> Resource Forms -> Chartfield Request Form -> Project ID)
   https://cafejava.northwestern.edu/nu_portal/gl/cfrequest/ChartFieldHome.html#

3. Scan the completed form to Hannah Maendel (h-maendel@northwestern.edu) for Dean's Office approval. Hannah will review and forward on to Accounting Services. E-mail confirmation will be sent out once the project has been activated.

*Note:

- The Dean’s Office creates designated discretionary/research projects for in-coming faculty with WCAS-committed research funds; it is not necessary for department administrators to request these.
- Student organizations who are not directly affiliated with departments and programs should request chart string setup through Student Organization Finance Office. See link for additional details:
  http://www.norris.northwestern.edu/services/sofo/

Deactivating a Designated (Fund 171) Chart String:

WCAS deactivates projects that are no longer being used on a monthly basis at the request of department administrators. Please follow the steps below to request deactivation:

1. Projects must have a balance of exactly $0.00 at the time they are deactivated. Verify that the project balance is $0.00 by running a Cognos GL068 or GL005 report.

2. Complete the Chartfield Project ID Inactivation Request Form:
   (NUPortal -> Finance & Budget -> Resource Forms -> Chartfield Request Form -> Project ID)
   https://cafejava.northwestern.edu/nu_portal/gl/cfrequest/Inactivation%20Excel%20Template.xls

3. Scan the completed form to Hannah Maendel (h-maendel@northwestern.edu) for Dean’s Office approval. Hannah will review and forward on to Accounting Services. E-mail confirmation will be sent out once the project has been deactivated.

Note: Deactivation requests must be received by the 15th of each month in order to be deactivated prior to month-end closing.