

CHARTFIELD MAINTENANCE

ACTIVITY NUMBER & DEPARTMENT MAINTENANCE REQUEST E-FORM INSTRUCTIONAL GUIDE

Requestor Instructions

for

New Activity Number Request

A. The Three Choices of the Activity Nbr / Department e-Form

The new phase of the **Activity Number & Department Maintenance Request e-Form** was created to streamline the process of requesting, approving and documenting the following:

- a new department
- a department change
- a new activity number (including deactivation and changes to activity numbers and SpeedTypes)

FIU FLORIDA INTERNATIONAL UNIVERSITY

Division of Business and Finance/Division of Human Resources

Requested By: Iman Elbadramany Contact Phone Number: 305-348-1241

Email Address: ielbadra@fiu.edu

Select a transaction to proceed:

New Department Request

New Activity Number Request

Department Changes

Start

Please log in to ImageNow using a MyAccounts Username and Password to fill out the [Activity Number & Department Maintenance Request eForm](#).

The emphasis of this Instructional Guide is geared towards the requestor filling out the form for a new Activity Number, with additional comments on how to request changes, deactivations and department changes.

B. To Fill the Form for a New Activity Number

The screenshot shows the top portion of a web form. At the top left is the FIU logo and the text "FLORIDA INTERNATIONAL UNIVERSITY". Below this is the text "Division of Business and Finance/Division of Human Resources". The form contains several input fields: "Requested By:" with the value "Iman Elbadramany", "Contact Phone Number:" with the value "305-348-1241", and "Email Address:" with the value "ielbadra@fiu.edu". Below these fields is a section titled "Select a transaction to proceed:" with three radio button options: "New Department Request", "New Activity Number Request", and "Department Changes". The "New Activity Number Request" option is selected, indicated by a red arrow pointing to it and a red box containing the number "0". A "Start" button is located below the radio buttons.

0. New Activity Number Request (also Changes and Deactivation)

To request a new activity number, as well as to make a change or for deactivation, select the “New Activity Number Request” radio button and click “start”.

The screenshot shows the "New Activity Number Request" form. At the top right, it says "November 8, 2013". The form contains several input fields and dropdown menus: "Requested By:" (redacted), "Contact Phone Number:" (305-348-1241, annotated with a red box "1"), "Email Address:" (redacted), "New Activity Number Description:" (Enter Title for New Activity, annotated with a red box "2"), "Department ID:" (202052000, annotated with a red box "3"), "Department:" (Chemistry), "Site:" (01, annotated with a red box "4" and a red arrow pointing to the dropdown), "Site:" (Modesto A. Maidique Campus), "Funding Group:" (300 - Auxiliary Enterprises), "VP / Executive Area:" (Academic Affairs), and "CIP (AA/DoR only):" (40.0500, Chemistry).

1. Requested by / Contact Phone Number / Email Address:

These fields will populate automatically once logged in with MyAccounts Username and Password. Please confirm they are correct. You may need to enter your phone number.

2. New Activity Number Title:

This field is limited to 30 characters, so choose a description wisely.

3. Department ID:

The Department ID that the Activity Nbr will roll-up to needs to be entered in this field. There are several ways of entering the Department ID:

- Enter the 9-digit "Department ID" and this will automatically populate the description; or enter the first 5 digits and select from a dropdown list
- Or enter the first 5 letters of the department's description and this will generate a list; select the applicable description from this list

NOTE: *If this is an activity requested for a new department, the Department ID will be populated from the information entered in the "new Department" section of the e-form.*

4. Site:

Select the Site code from the dropdown menu or enter the first five letters of the location or country in the "Site Description Box" and select from the dropdown list.

Note: *If you need a new Site created, contact FSSS (Controller@fiu.edu) for further instructions.*

Department ID:	202052000 5	Chemistry	Site: 01	Modesto A. Maidique Campus
Funding Group:	300 - Auxiliary Enterprises	VP / Executive Area:	Academic Affairs 6	
CIP (AA/DoR only):	40.0500 7	Chemistry		
Purpose of New Activity Number (be specific):	<p>Type the justification for requesting a new activity number here.</p> <p>If this is a request to inactivate, give the "Move-To" activity number and explain.</p> <p>If this is a request to move to another dept or change a fund, for example, explain here.</p>			

5. Funding Group:

Select a “Funding Group” from the drop down menu. If the funding group is “Auxiliary Enterprises” or “Agency Fund”, it is necessary to select a “Guarantee Activity Nbr” as explained in step 9.

If the “Funding Group” is 300 – Auxiliary Enterprises, then please fill out and process the required **Auxiliary Package** located at: [http://aed.fiu.edu/downloads/Request_for_Auxiliary_Packet_\(RAP\).xlsx](http://aed.fiu.edu/downloads/Request_for_Auxiliary_Packet_(RAP).xlsx). As of April 2016, please mail the packet to David Snider dsnider@fiu.edu.

The main requirements Auxiliary have for opening new activity numbers are the following:

- Must have actual or forecasted revenue and/or expense activity of the least \$10K each year
- Must be for a continuing operation, not a one-time event

6. VP/Executive Area:

Select a “VP/Executive Area” from the drop down menu. The VP/Executive Area is a high level rollup of your department within the University (i.e. Department 110401000 Office of the Controller Adm. rolls up to the Division of Finance). Please select the area associated with the Department ID in box 3 when completing the form.

If the Executive Area is “Academic Affairs”, you are required to fill out the CIP box as explained in step 7.

7. CIP:

CIP is a classification of instructional programs developed by the US Department of Education. This field requires 6 digits as shown below.

FIU has a list of the CIP Codes it uses, classified pursuant to departments. A link to the [CIP Codes List](#) can be found on the Controller’s website, in the “Forms” tab, under Financial Services. See example 7b. You can enter the first two digits and select from the drop down menu.

Note: If your activity is not on the FIU list, use 00.0000 as your CIP.

	A	B	C	D
1	DEPTID	DESCR	CIP Code	CIP code description
2	202033000	CRIMINAL JUSTICE	43.0104	Criminal Justice
3	202034000	ECONOMICS	45.0601	Economics
4	202035000	ENGLISH	16.0102	Linguistics
5	202035000	ENGLISH	23.0101	English Language and Literature
6	202035000	ENGLISH	23.1302	Creative Writing
7	202036000	GLOBAL & SOCIOCULTURAL STUDIES	45.0701	Geography
8	202036000	GLOBAL & SOCIOCULTURAL STUDIES	45.1101	Sociology
9	202036000	GLOBAL & SOCIOCULTURAL STUDIES	45.0201	Anthropology

Purpose of New Activity Number (be specific):

8 Type the justification for requesting a new activity number here.
 If this is a request to inactivate, give the "Move-To" activity number and explain.
 If this is a request to move to another dept or change a fund, for example, explain here.

For Auxiliary and Agency Requests Only **9**

Guarantee Activity Nbr:

NOTE: The Guarantee Activity Nbr must be an Auxiliary, and must be approved for use by the Transactional Approver. This Activity Nbr will be used to cover any deficits incurred in the new account, which cannot be covered by operational cash flow at fiscal year-end. Any deficits remaining in the Activity Nbr, if closed, will also be covered by the Guarantee Activity Nbr listed.

View Activity Request' History **10**

I certify that the above information is correct. **11**

Edit Form

8. Purpose:

Describe the purpose of requesting a new activity number in the comment box provided. This comment box is also used to specify the exact requested Activity Nbr, or to explain the modifications needed.

- Approvers need specific information to process new activity number requests
- The Request must include a detailed description of:
 - All revenue streams, if applicable
 - What the money will be used for, for example: faculty to instruct, faculty development, research activities, academic advising, etc...
- Office of the Controller requirements for opening new activity numbers are the following:
 - Must have actual or forecasted revenue and/or expense activity of the least \$10,000 per year
 - Must be for a continuing activity, not a one-time event.
- If a requestor does not meet these 2 criteria then the only way to get the activity number opened is through approval of an exception by the Controller. You can email Jose Zubimendi jzubimen@fiu.edu or Alexandra Mirabal aimiraba@fiu.edu with your exception request, include a detailed explanation of why the new activity number is needed and the Revenues and Expenses that will be associated with this new activity number.

9. Guarantee Activity Nbr:

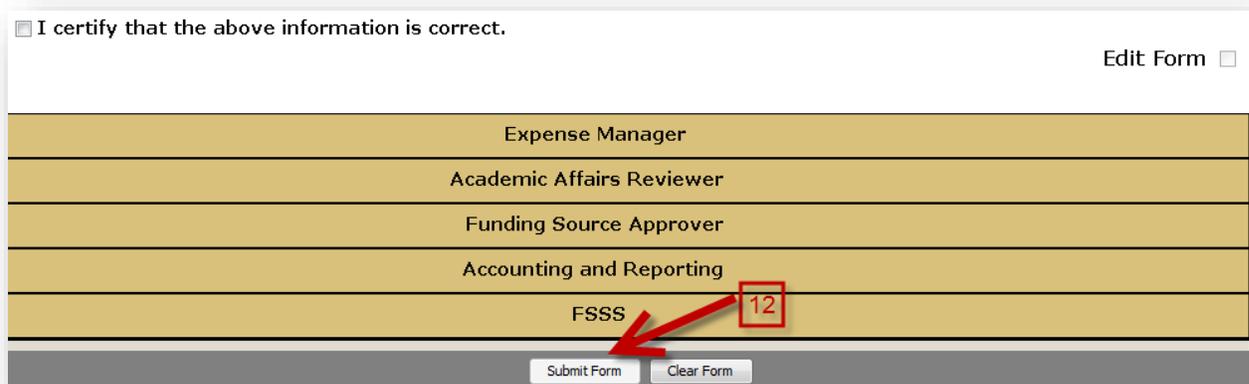
If using "Auxiliary Enterprises" or "Agency Fund" as the funding group, select a "Guarantee Activity Nbr" from the dropdown menu.

10. History:

After submitting the e-form, you can re-open the “View Only” link to see any changes made to the request.

11. Certification:

Before submitting the form, it is necessary to certify that the information entered is correct.



I certify that the above information is correct. Edit Form

Expense Manager
Academic Affairs Reviewer
Funding Source Approver
Accounting and Reporting
FSSS

12. Submit the form:

Once the form has been completed, select the submit button at the very bottom of the form.

Note: *Once the form has been submitted it cannot be modified by the requestor. (It may be updated by the expense manager or Academic Affairs Reviewer.)*

C. After Filling and Submitting the e-Form

- An email confirming submission will be sent to the requestor; it will include a link. Follow the link to view the e-Form. Refer back to this link to check the e-Form status.
- The e-Form will be forwarded automatically to various reviewers and approvers, who can accept or deny the request, or make modifications before approving.
- When the request has been fully approved, the requestor will receive an e-mail with the new activity number.

D. To Fill the Form for a Change or Deactivation of an Activity Number

Requestor		Date: September 12, 201
Requested By:	<input type="text" value="Desiree Mesa"/>	Contact Phone Number: <input type="text" value="305-348-2494"/>
Email Address:	<input type="text" value="mesad@fju.edu"/>	
New Activity Number Title:	<input type="text" value="DEACTIVATE-2020150005-A&S IND"/>	13
Department ID:	<input type="text" value="202001000"/> <input type="text" value="CAS Deans Office Admin"/>	Site: <input type="text" value="02"/> <input type="text" value="Biscayne Bay Campus"/>
Funding Group:	<input type="text" value="650 - Sponsored Research"/>	VP / Executive Area: <input type="text" value="Academic Affairs"/>
CIP (AA/DoR only):	<input type="text" value="24.0101"/> <input type="text" value="Liberal Arts and Sciences"/>	
Purpose of New Activity Number (be specific):	<div style="border: 1px solid black; padding: 5px;"> <p>14 → DEACTIVATE-2020150005-A&S IND CST SUBACCT BIOLOGY Balance Move to: 2020150003</p> </div>	

Follow the steps of new activity nbr request with two exceptions:

13. Title:

Write the type of change or deactivation requested.

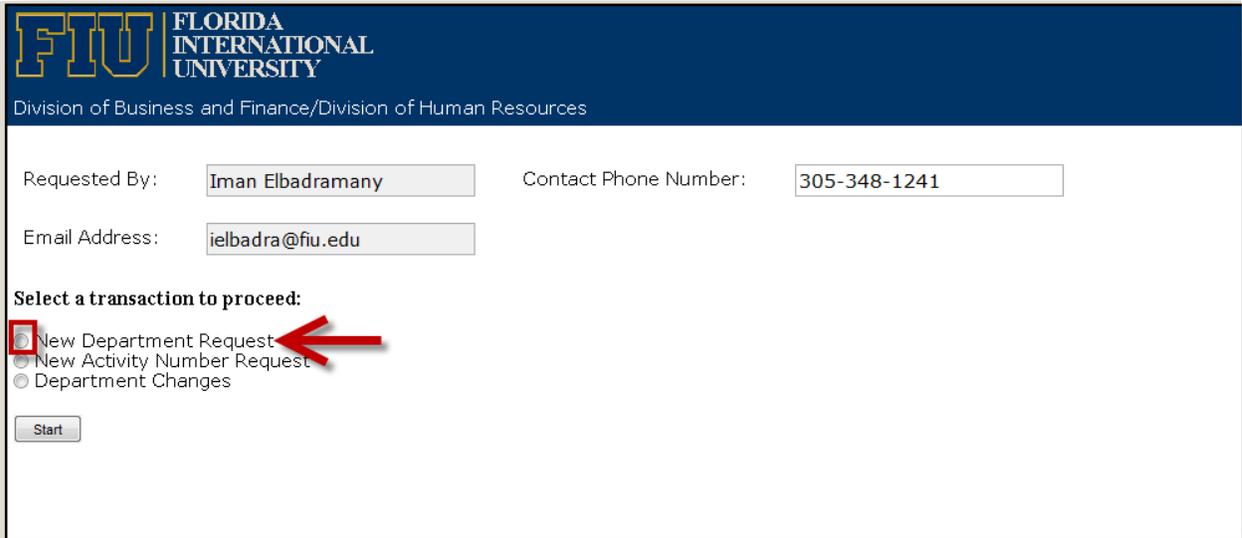
14. Purpose:

Explain the change or deactivation that you are requesting. Include the Move-to Activity number.

15. For Deactivations:

A replacement activity number is required and will be used by Accounting and Reporting to reclassify account balances and error correction if necessary in the future. Please ensure that the replacement activity number is within the same fund or at a minimum does not cross fund types, i.e. restricted fund does not move to an unrestricted fund.

E. To Fill the Form for a New Department



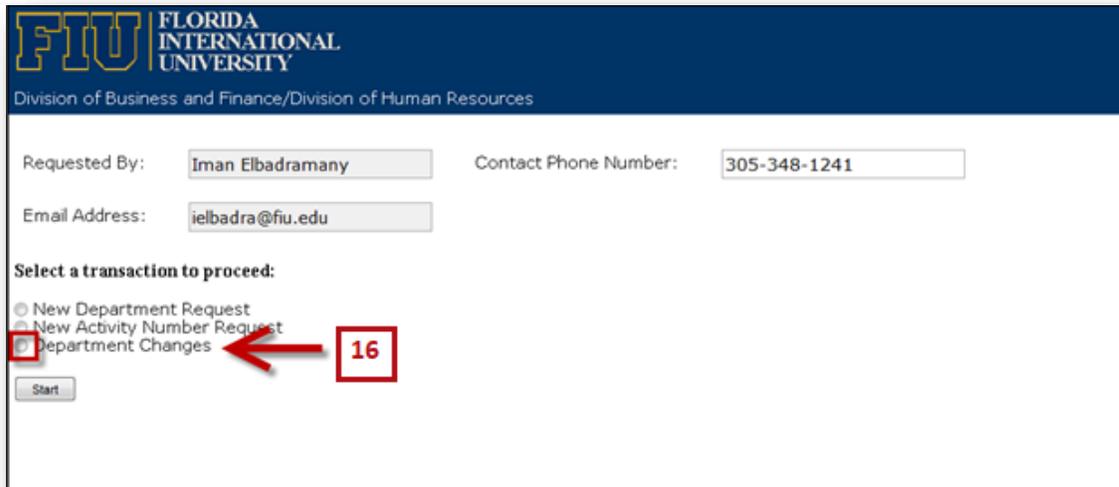
The screenshot shows the top portion of a web form for Florida International University. The header includes the FIU logo and the text 'FLORIDA INTERNATIONAL UNIVERSITY' and 'Division of Business and Finance/Division of Human Resources'. Below the header, there are input fields for 'Requested By' (filled with 'Iman Elbadramany'), 'Contact Phone Number' (filled with '305-348-1241'), and 'Email Address' (filled with 'ielbadra@fiu.edu'). A section titled 'Select a transaction to proceed:' contains three radio button options: 'New Department Request' (which is selected and highlighted with a red box and a red arrow), 'New Activity Number Request', and 'Department Changes'. A 'Start' button is located below the radio buttons.

New Department Request:

Fill out the information for the department in the top section of the form. Contact HR Compensation Administration regarding filling out the new department section.

You will also have to fill out the New Activity Number Request section at the same time. Follow the steps for requesting a new activity number as described in this manual. (Some of the fields will auto-populate.)

F. To Fill the Form for a Department Change



The screenshot shows the FIU Department Change Request form. The header includes the FIU logo and the text "FLORIDA INTERNATIONAL UNIVERSITY" and "Division of Business and Finance/Division of Human Resources". The form contains the following fields:

- Requested By: Iman Elbadramany
- Contact Phone Number: 305-348-1241
- Email Address: ielbadra@fiu.edu

Under the heading "Select a transaction to proceed:", there are three radio button options:

- New Department Request
- New Activity Number Request
- Department Changes

A red box highlights the "Department Changes" radio button, and a red arrow points to it from a red box containing the number "16". A "Start" button is located below the radio buttons.

16. Department Changes Request:

Choose to make a department change. This is a change to the HR department, not to the Activity Number. Contact HR Compensation Administration regarding filling out the form.

For Updating Expense Managers fill out the following:

FIU FLORIDA INTERNATIONAL UNIVERSITY
Division of Business and Finance/Division of Human Resources
Change Department Request

HR Department Change

Effective Date: 11/08/2013 Existing Department: 110200000 South Beach Wine and Food Fe

Reports to Department: Department Department Description Business Unit: Select...
Proposed Description: Location: Select...
Financial Tree Node: Select...
Default Activity Number:

Department Manager: Panther ID Manager Name

Primary Expense / Asset Manager: 2401466 Alex Perez
Secondary Expense Manager: Panther ID Manager Name

Primary HR Contact: Panther ID Contact Name
Secondary HR Contact: Panther ID Contact Name
Other HR Contact: Panther ID Contact Name

Add Rows Delete Rows

View Department Request' History

I certify that the above information is correct.

17. Effective date:

Enter the effective date

18. Department:

Enter the ID of the department that you would like to make changes to (9 digits)

19. Field to be changed:

Only enter the information into the field that you need to change

20. Certification:

Before submitting the form, it is necessary to certify that the information entered is correct.



The screenshot shows a form with a list of reviewers. The reviewers are: Business Unit Head, Academic Affairs Reviewer, HR Compensation, HR Compensation, and FSSS. The FSSS reviewer is highlighted with a red box and a red arrow pointing to it. Below the list are two buttons: 'Submit Form' and 'Clear Form'.

Business Unit Head
Academic Affairs Reviewer
HR Compensation
HR Compensation
FSSS

Submit Form Clear Form

21. Submit:

Submit the Form. You will receive a confirmation e-mail. If you do not receive a confirmation e-mail, please contact FSSS.

G. After Filling and Submitting the e-Form

- An email confirming submission will be sent to the requestor; it will include a link. Follow the link to view the e-Form. Refer back to this link to check the e-Form status.
- The e-Form will be forwarded automatically to various reviewers and approvers, who can accept or deny the request, or make modifications before approving.
- When the request has been fully approved, the requestor will receive an e-mail stating that the changes have been approved.