EMRTC Activity Code Procedures

Naming
The activity code is constructed of 6 characters. The first letter defines what organization/department it is associated with. The next two numbers are in correspondence to the fiscal year and the last three numbers are a sequence series starting at 001. At the beginning of each new Fiscal Year the second and third characters are updated and a new series is started.

The activity code can be used on most EMRTC and Restricted Funds fund numbers. If unsure please contact the EMRTC Controller department to confirm that it is allowed on the fund in question. Below is a brief outline.

1. Organization/Department
   a. EMRTC (J)
   b. ICASA (I)
   c. Playas (A)
   d. DOT (D)
   e. IERA (IE)
   f. General Dynamics (G)

2. Fiscal Year
   a. FY 15—35
   b. FY 14—34
   c. FY 13—33

3. Number Series
   a. The first project of the year is assigned 001
   b. Second project 002
   c. So forth...

Opening
The EMRTC Pre-Award department is responsible for reviewing new activity code requests to ensure all required information and forms are properly completed and routed for management approval before an activity code number can be assigned.

The Pre-Award department is the only authorized personnel who can assign a new activity code number for submitted requests.

Prior to entering a new activity code onto the Banner and Intranet systems perform the following queries.

Please Note: DO NOT SKIP THE FOLLOWING STEP.
(The Banner system will allow you to open the new Activity Code Number multiple times if there is any variance in title description.)

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Banner Query
1. Enter screen name FTMACTV in the Go To box on the Banner General Menu. Hit enter.

2. Press F7 when screen appears. Enter a 1 in the Chart of Accounts Box. Tab to the Activity Box and enter the new activity code number. Press F8.

3. Ensure that the activity code has not been previously opened on the system by confirming message on the left-hand bottom of the screen that states "Query caused no records to be retrieved. Re-enter". If the activity code has been entered on the Banner system the established record will be displayed and at this point you need to check with the Pre-Award department in order to determine if it is necessary to utilize a different activity code number.

Intranet Query
1. Login to the Intranet and click on Administration under the Finance tab.

2. On right hand side click on View Existing Activity Codes under Activity Code Management.

3. Scan thru the Activity Code Column on the left hand side for the new activity code number and confirm that it has not been opened up previously.

4. If there is a need or concern you may also click on the Show Inactive Funds tab in the middle of the page and it will allow you to verify if the activity code is already open but has been made inactive.

Opening in Banner
Please Note: It is important to open new Activity Code Numbers on the BANNER System first before entering them on the Intranet as the Activity Title box on Banner is limited to a certain number of characters and it is preferable to use the same exact project title on both systems.

If after performing the F7 search on Banner screen FTMACTV confirms that the new activity code is not on the system enter all necessary fields by tabbing thru on the FTMACTV screen (Banner screen example attached).

1. Chart of Accounts box- Enter 1

2. Ensure that the Active Status box is checked.

3. Activity box - Enter new Activity Code Number

4. Activity Title box - Enter Name/Title of Project
   a. Begin the name/title of Projects as follows:
      i. EMRTC Internal Projects: EMRTC - XXXXXXXXXX
      ii. Campus Projects: NMT – XXXXXXXXXX
      iii. Outside Organization: Company Name/Project Title
      iv. Cost Share: EMRTC-Company-Project Title

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5. Effective Date box - Enter the end date of the payroll period that **precedes** the start date of the project Period of Performance in the following format: 01-APR-2014
   **Please Note:** You cannot tab thru the effective date field, the date must be filled in manually in the format listed above.

6. When cursor flashes in the Termination Date box verify your entries are correct and when ready press F10 to save the information on Banner which will open up the Activity Code for entry. (Do not enter any data in the Termination Date box for new activity codes).

7. If desired you may also perform an F8 search for an old record, after it is displayed hit F6 then hit F4. This will make a copy of the old record and you can tab thru the copy and enter the new activity code information. **Caution:** Be sure to verify the new entries on the copy before hitting F10 to save on the system.

**Opening on the Intranet**
Sign in to the Intranet and click on Administration under the Finance tab. On the right hand side click on Add Activity Code under Activity Code Management.

1. Enter the new Activity Code number in the Activity Code box on the left hand side (Intranet Screen example attached).

2. Enter the name/title used in Banner in the Code Description box on the left hand side.

3. If Property Approval is required check the box.

4. Ensure that Current is indicated (checked) in the Fund Status box.

5. Verify correct entries and then click on Save Activity Information.

6. Hit the back arrow/Click view Existing Activity Codes to confirm entry.

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