


# Directions for Completing the SubActivity Segment Value Request Form

When a new SubActivity value is required, the Requestor must:

- Fill out the SubActivity Segment Value Request Form (below) with all of the information needed by the Controller's Office.
- Have the request and form approved by your Division or School Fiscal Officer.
- Forward the form and any accompanying information to the Controller's Office.

 <b>Dartmouth College</b> <b>SubActivity Segment Request Form</b> <b>*** All Fields Are Required ***</b>		
Requestor Name: <span style="float: right;">(1)</span>	Position Title: <span style="float: right;">(2)</span>	Request Date: MMDDYY <span style="float: right;">(3)</span>
Division/Department: <span style="float: right;">(4)</span>	Phone: <span style="float: right;">(5)</span>	E-Mail: <span style="float: right;">(6)</span>
<b>Check The Appropriate Action and Indicate the Desired Effective Date</b> <input type="checkbox"/> Create New <span style="float: right;">(7)</span> <span style="margin-left: 100px;"><input type="checkbox"/> Disable Existing <span style="float: right;">(9)</span></span> <small>MMDDYY</small> <span style="margin-left: 100px;"><small>MMDDYY</small></span> <input type="checkbox"/> Modify Existing <span style="float: right;">(8)</span> <span style="margin-left: 100px;"><input type="checkbox"/> Re-Enable Existing <span style="float: right;">(10)</span></span> <small>MM</small> <span style="margin-left: 100px;"><small>MM</small></span> <span style="margin-left: 100px;"><small>YY</small></span>		
<b>Provide the Subactivity description you are requesting.</b>		
Description (not to exceed 35 characters)	Requested Value	Assigned Value
SubActivity Child → <span style="float: right;">(11)</span>	(12)	(13)
<b>Provide the Level 5 Child Activity Description and the Corresponding Value that this sub-activity is linked to.</b>		
Description (not to exceed 35 characters)	Value	
Activity Level 5 Child → <span style="float: right;">(14)</span>	(15)	
<b>Describe The Specific Business Purpose For This New Segment Value Or The Reason For Requesting The Change:</b> <span style="font-size: 2em;">(16)</span>		
Division/School Fiscal Officer Approval:		Date:

Please refer to the following table for definitions of items on the Request Form.

<b>Form #</b>	<b>Field</b>	<b>Description</b>
1	<b>Requestor Name</b>	Name of the individual who is requesting the new value
2	<b>Position Title</b>	Position Title of the Requestor
3	<b>Request Date</b>	Date of the request for the new SubActivity Value. Please allow 5 business days for processing and set up in the Oracle GL.
4	<b>Division/Department</b>	Division or department in which the Requestor works.
5	<b>Phone</b>	Phone number of the Requestor
6	<b>E-Mail</b>	E-Mail address of the Requestor
7	<b>Create New</b>	Check if you would like a new SubActivity value created. Indicate the desired date (MMDDYY) for this value to be effective.
8	<b>Modify Existing</b>	Check if you would like an existing SubActivity modified (e.g. move child values to a different parent or modifying Org descriptions). Indicate the desired effective date (MMDDYY) for this value to be modified.
9	<b>Disable Existing</b>	Check if you would like an existing SubActivity value to be disabled (frozen). Indicate the desired effective date (MMDDYY) for this value to be disabled.
10	<b>Re-Enable Existing</b>	Check if you would like an existing SubActivity that had been previously disabled, to be Re-Enabled. Indicate the desired effective date (MMDDYY) for this value to be re-enabled.
11	<b>Child Requested Description</b>	Description that the end-user will see in reports. Provide the description you would like the value to have. Description must not exceed 35 characters.
12	<b>Requested Value</b>	If a specific value is requested, indicate in this box (four digits only).
13	<b>Assigned Value</b>	For Controller's Office Use only. This is where you will see the new value assigned.
14	<b>ACTIVITY Child Description</b>	Provide the ACTIVITY Child Description to which the SubActivity should be attached.
15	<b>ACTIVITY Child Value</b>	Provide the ACTIVITY Child Value to which the SubActivity should be attached.
16	<b>Business Purpose</b>	Provide the specific business purpose for the new segment value, or the reason you are requesting the change.

### **Key Items to Keep in Mind:**

- All fields are required. Requests will be sent back if all fields are not filled in properly.
- New SubActivity Value requests must be approved by your Division or School Fiscal Office.
- The Request Form must come in e-mail format to the Controller's Office at GL Chart@dartmouth.edu.
- Child Descriptions and Values MUST be provided.

## Next Steps

- Send the Request Form via E-mail to your Fiscal Officer. The Fiscal Officer will approve or deny the Request.

<b>If . . .</b>	<b>Then . . .</b>
The request is approved	The Fiscal Officer will send the approved request form via e-mail to the Controller's Office.
The request is denied	The Fiscal Officer will send the denied request form via e-mail back to the Requestor with the reasons why it was not approved.

- The Controller's Office makes the changes in GL and sends an e-mail with the new assigned value to the Fiscal Officer and Requestor.