

Financial Services

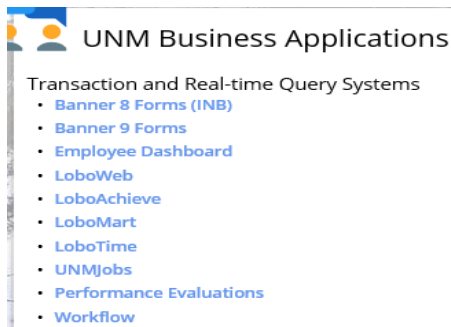
Date: January, 2021

Chart of Accounts: Term Index Request FSJA-110

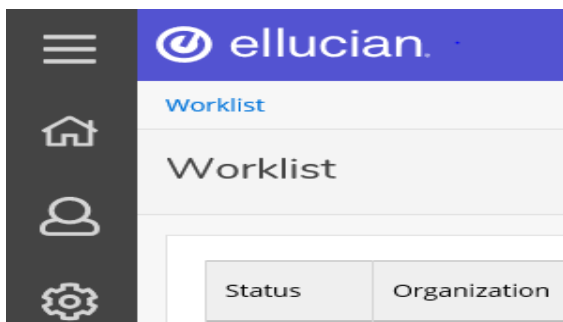
Users must have the Department Chart of Accounts Requisitioner BAR role to initiate term index requests in Workflow.

Requests to terminate Unrestricted Index Codes are submitted through Workflow. Once a user submits a request validation checks are performed to assure there are no open items on the Indexes.

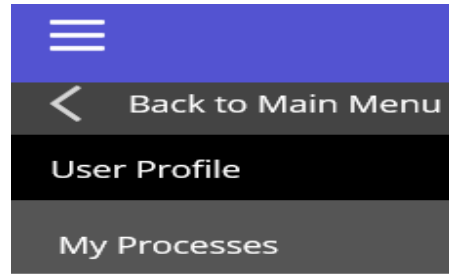
1. Access Workflow from the UNM Business Applications Channel, in the MyUNM Portal:



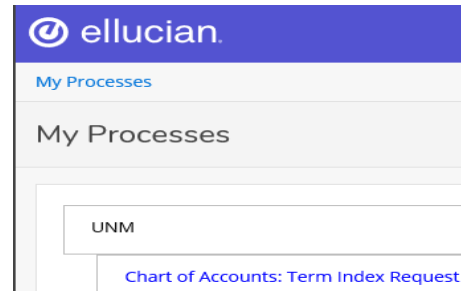
2. To access the term index select
 - a. The hamburger icon in the upper left
 - b. Or the image of the person



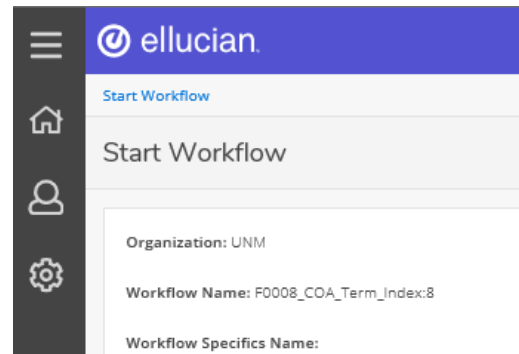
3. Select – “My Processes”



4. Select Chart of Accounts: Term Index Request



5. The Start Workflow form will open:



Financial Services

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Chart of Accounts:
Term Index Request
FSJA-110 (continued)

6. Workflow Specifics Name: - **Leave Blank**
7. Workflow Note – **Leave Blank**
8. Priority – Not enabled for this Workflow

Start Workflow

Organization: UNM

Workflow Name: F0008_COA_Term_Index:8

Workflow Specifics Name:

Priority:
Normal

Workflow Note:

Required Parameters

*index_code:

Description:
Enter only one index_code to be terminated above,
then click Start Workflow.

See instructions at:
<http://fssc.unm.edu/docs/fsja-110.pdf>

*Requester_comment:

Description: A maximum of 100 characters is allowed in this field. Only the first 100 characters will be added to the request.

Attachments

9. In the Required Parameters Section:
 - a. Enter IC to be terminated
 - b. Enter Requestor Comments

10. Select Start Workflow in the upper right corner

 Attach File  Start Workflow  Reset  Cancel

Open items must be resolved before the IC can be termed.

If there are no open items, the IC will be automatically terminated in Banner without additional approvals. The requestor will be notified via email that the IC has been terminated.

Some index types require additional approval before they are terminated. Disapproved workflows will notify the requestor via email.

If there are open items, the requestor will receive an email from workflow@unm.edu listing all open items and contact information for assistance. The Workflow is automatically stopped at this point.

The Workflow will remain in the requester's worklist until re-submitted. After open items are resolved, the workflow can be re- submitted:

- Select the Workflow in your worklist
- Select Complete
- Request will route back through validations.

Questions should be emailed to fsm@unm.edu for assistance.