

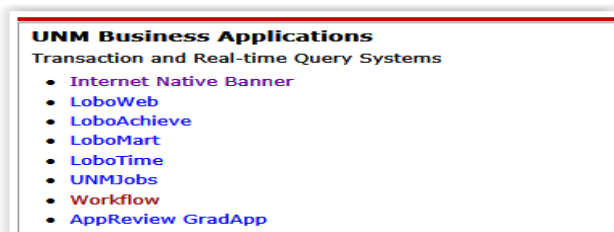
Financial Services

Date: October 2015

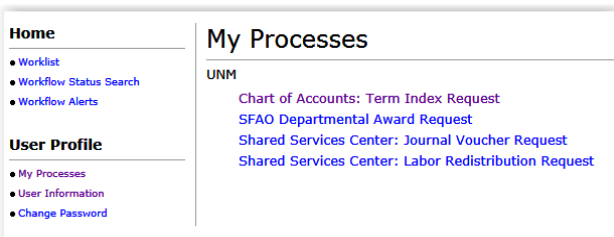
Chart of Accounts: Term Index Request FSJA-110

Requests to terminate an Unrestricted Index Code are submitted through Workflow. Once a user submits a request for Index Code (IC) termination, validation checks are performed to assure there are no open items on the IC.

1. To submit a request for termination:
 - a. Access Workflow from the UNM Business Applications Channel, in the MyUNM Portal:



2. In Workflow - Under User Profile
 - a. Select My Processes
 - b. Select Chart of Accounts: Term Index Request



3. The Start Workflow form will open:
 - a. Workflow Specifics Name: - **Leave Blank**
 - b. Workflow Note – **Leave Blank**

A screenshot of the "Start Workflow" form. It shows fields for Organization (UNM), Workflow Name (F0008_COA_Term_Index_0), Priority (Normal), and Workflow Note. Below these are the "Required Parameters" section, which includes fields for Index_code, Requester_comment, and a description field. The form also includes "Start Workflow", "Reset", and "Cancel" buttons.

4. In the Required Parameters box:
 - a. Enter IC to be terminated
 - b. Enter Requestor Comments
 - c. Select Start Workflow

A screenshot of the "Required Parameters" form. It shows fields for Index_code (594000), Requester_comment (Index funding spent, no longer used), and a description field. The form also includes "Start Workflow", "Reset", and "Cancel" buttons.

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 requester 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.

END