

Financial Services Support Center

From: Financial Services Support Center
Sent: Friday, December 18, 2020 1:51 PM
To: Financial Services Support Center
Subject: A NEW CHART OF ACCOUNTS APPLICATION IS HERE!

Hello,

You are receiving this email because you have the Chart of Accounts (COA) Requester department role or you are a Fiscal Agent. In our continued efforts to provide Departments with user friendly tools and streamline processes, Financial Services and our IT partners created a new web based Chart of Accounts application that does NOT require JAVA! **The application is now open for business** on the FSSC website @ <http://fssc.unm.edu/resources.html>.

Please take time to get familiar with the intentional information provided on each screen. The new application provides more validations and makes the approval routing process more seamless. Activity and index requests will route to the Org Code's Financial Manager (FM) by default. The requestor will have the option to override the FM and choose a different approver. This will give departments more flexibility.

What does this mean for Banner Authorization Request security?

- Department General Inquiry is required to access the new application.
- The Department COA role is no longer required to access the new application.
- The current COA role will be repurposed to only be needed if you need to term an index as this will continue to reside in Workflow.
- The role will still route to Fiscal Agents for approval for users who need to terminate indexes.

Access to the application:

- All users and approvers must be an active employee with Banner Finance access to get into the app.
- Departmental approvers will receive an email in their preferred email to notify them of a pending approval.
- VPN is required to access the application.
- It does not work with Internet Explorer.
- **The old application will retire on 1/4/2021.**

This is the homepage you'll see after logging into VPN.

 Home

Announcement: Welcome to the new Chart of Accounts Application!

Home

Please log in to access.

Access to this application requires the Banner Finance Department General Inquiry role.

This application works on the minimum version of the following browsers:

- Google Chrome v84
- Apple Safari v13
- Mozilla Firefox v79
- Microsoft Edge v86

This application does NOT work with Internet Explorer!!

Application Navigation:

- Take note of the guidance for getting help on the Home page after you login.
- Designated Approver – When entering in the netid of the approver, always use capital letters as 'NETID', not 'netid'.
- Initiators cannot approve their own requests.
- Initiators can withdraw/edit requests before final approval.
- If you get too many error messages when requesting an index, cancel it and start over. There are a lot of validations going on behind the scenes so it takes some time to render the data.

If you have any questions, please send an email to fssc@unm.edu but do not 'reply all' to this email.

Thank you,
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