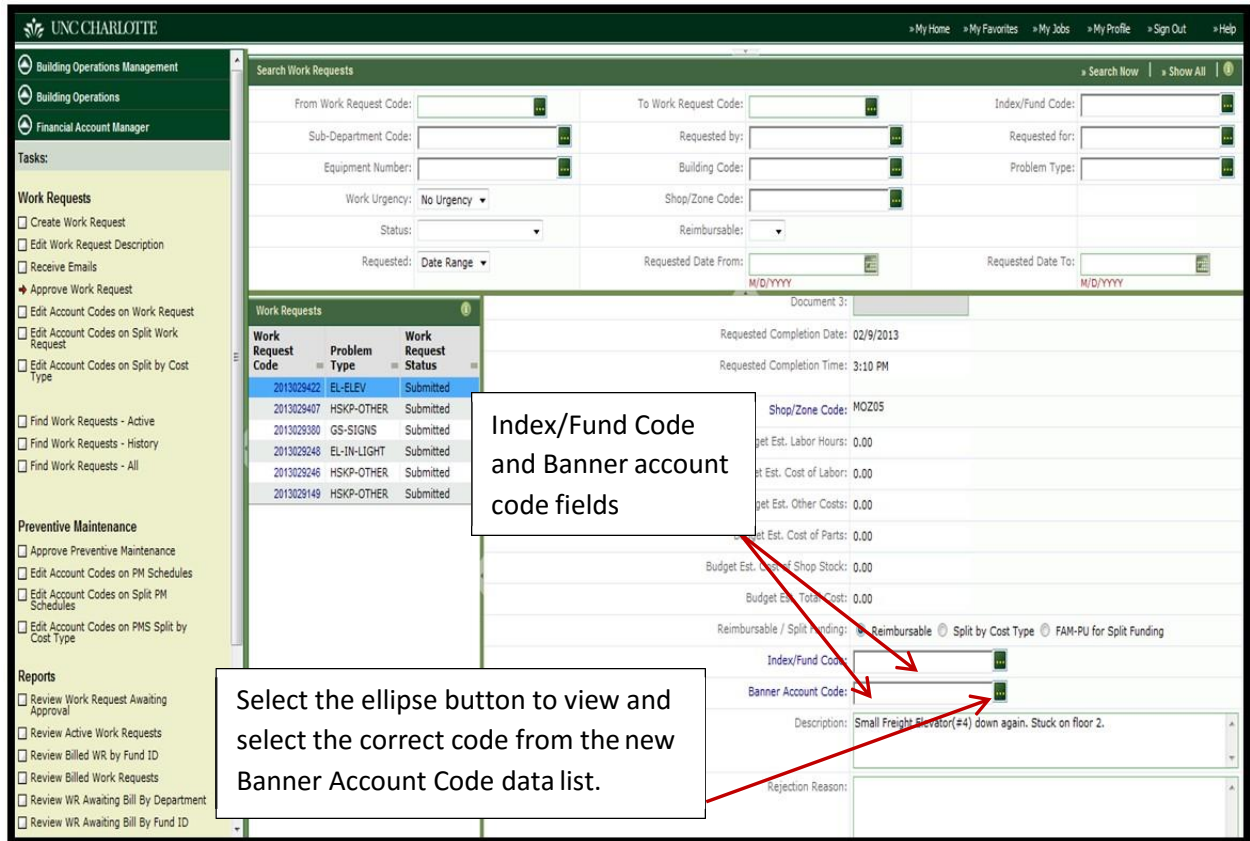


Important ARCHIBUS User Update for Banner Accounts:

In fiscal year 2014, Facilities Information Systems completed updates within ARCHIBUS Web Central to all Financial Account Manager Approval views and any views where the Banner Account Codes appear. These updates were completed per request of the Controller's Office. The changes were implemented in an effort to provide more information to you, the user, and to assist with the selection of applicable Banner account codes. Below is an overview of these changes to the Financial Account Manager (FAM) views.

New Important Changes:

1. When approving ARCHIBUS work requests, Motor Fleet Reservations, etc., Banner Account Codes should be selected from within the new data list instead of entered manually.

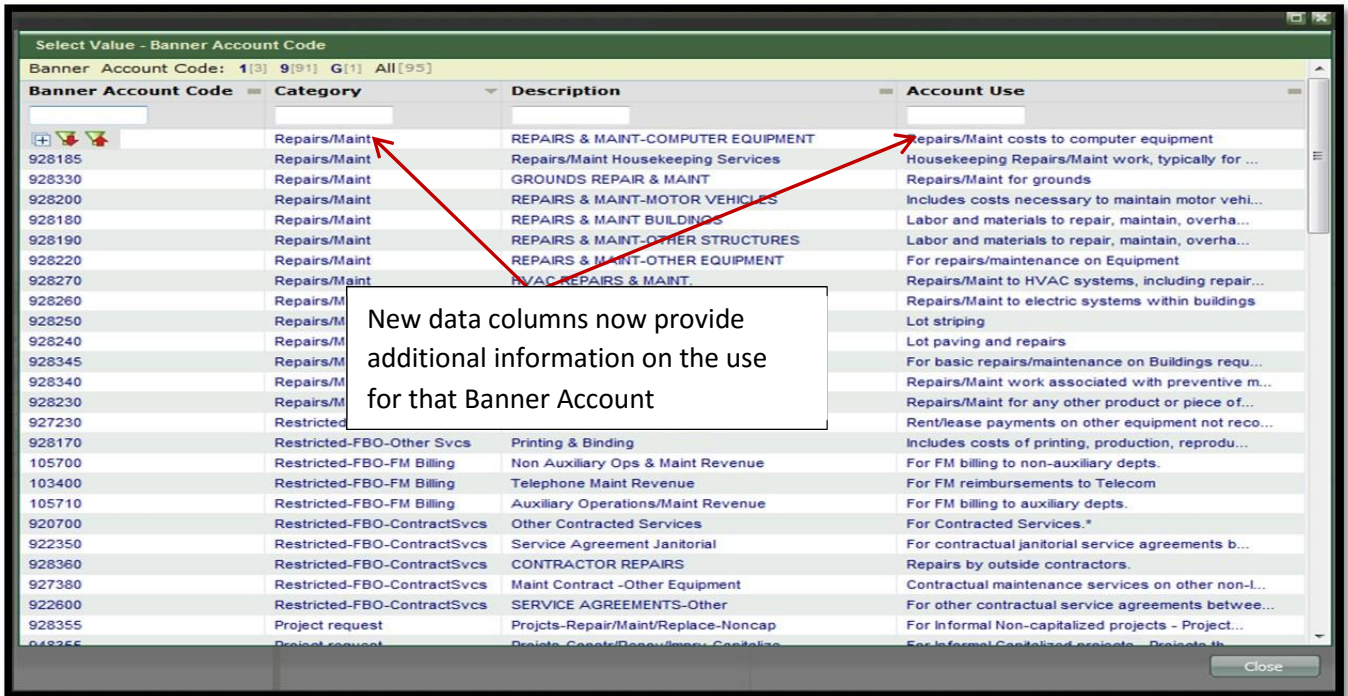


The screenshot displays the ARCHIBUS Web Central interface. On the left, there is a navigation menu with sections for 'Building Operations Management', 'Building Operations', and 'Financial Account Manager'. Under 'Financial Account Manager', there are 'Tasks' and 'Reports' sections. The main area shows a 'Search Work Requests' form with various filters like 'From Work Request Code', 'To Work Request Code', 'Sub-Department Code', 'Equipment Number', 'Work Urgency', 'Status', 'Requested', 'Requested Date From', 'Requested Date To', 'Index/Fund Code', 'Requested by', 'Requested for', 'Building Code', 'Shop/Zone Code', 'Problem Type', and 'Reimbursable'. Below the search form is a table of work requests with columns for 'Work Request Code', 'Problem Type', and 'Work Request Status'. A callout box points to the 'Index/Fund Code' and 'Banner Account Code' fields in the detailed view, stating: 'Index/Fund Code and Banner account code fields'. Another callout box points to the green ellipse button on the 'Banner Account Code' field, stating: 'Select the ellipse button to view and select the correct code from the new Banner Account Code data list.'





Work Request Code	Problem Type	Work Request Status
2013029422	EL-ELEV	Submitted
2013029407	HSKP-OTHER	Submitted
2013029300	GS-SIGNS	Submitted
2013029248	EL-IN-LIGHT	Submitted
2013029246	HSKP-OTHER	Submitted
2013029149	HSKP-OTHER	Submitted

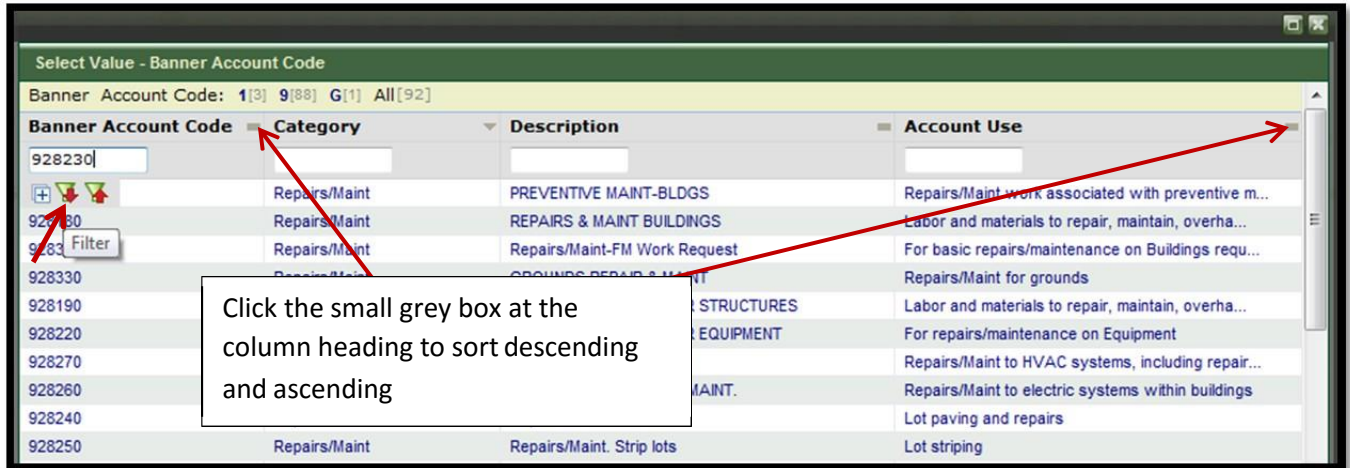
2. **New Banner Account Code view changes:** Selecting the green ellipse button on the **Banner Account Code** field will display the new Banner Account Code data list view.

- a. The new Banner Account Code pop up view now has two additional columns to further assist you when selecting the correct Banner Account Code.
- b. On the Banner Account view, the data list may be filtered or sorted to easily find the account you need.
- c. Filtering:
 - i. If you know which account number you need, you may enter the account code in the box at the top of the Banner Account Code column and hit Enter.
 - ii. If you want to filter by Category, Descriptions or Account Use that include certain key words, you can type those key words into the boxes at the top of each column and hit Enter.



Banner Account Code	Category	Description	Account Use
	Repairs/Maint	REPAIRS & MAINT-COMPUTER EQUIPMENT	repairs/Maint costs to computer equipment
928185	Repairs/Maint	Repairs/Maint Housekeeping Services	Housekeeping Repairs/Maint work, typically for ...
928330	Repairs/Maint	GROUPS REPAIR & MAINT	Repairs/Maint for grounds
928200	Repairs/Maint	REPAIRS & MAINT-MOTOR VEHICLES	Includes costs necessary to maintain motor vehi...
928180	Repairs/Maint	REPAIRS & MAINT BUILDINGS	Labor and materials to repair, maintain, overha...
928190	Repairs/Maint	REPAIRS & MAINT-OTHER STRUCTURES	Labor and materials to repair, maintain, overha...
928220	Repairs/Maint	REPAIRS & MAINT-OTHER EQUIPMENT	For repairs/maintenance on Equipment
928270	Repairs/Maint	HVAC REPAIRS & MAINT.	Repairs/Maint to HVAC systems, including repair...
928260	Repairs/M		Repairs/Maint to electric systems within buildings
928250	Repairs/M		Lot striping
928240	Repairs/M		Lot paving and repairs
928345	Repairs/M		For basic repairs/maintenance on Buildings requ...
928340	Repairs/M		Repairs/Maint work associated with preventive m...
928230	Repairs/M		Repairs/Maint for any other product or piece of...
927230	Restricted		Rent/lease payments on other equipment not reco...
928170	Restricted-FBO-Other Svcs	Printing & Binding	Includes costs of printing, production, reprodu...
105700	Restricted-FBO-FM Billing	Non Auxiliary Ops & Maint Revenue	For FM billing to non-auxiliary depts.
103400	Restricted-FBO-FM Billing	Telephone Maint Revenue	For FM reimbursements to Telecom
105710	Restricted-FBO-FM Billing	Auxiliary Operations/Maint Revenue	For FM billing to auxiliary depts.
920700	Restricted-FBO-ContractSvcs	Other Contracted Services	For Contracted Services.*
922350	Restricted-FBO-ContractSvcs	Service Agreement Janitorial	For contractual janitorial service agreements b...
928360	Restricted-FBO-ContractSvcs	CONTRACTOR REPAIRS	Repairs by outside contractors.
927380	Restricted-FBO-ContractSvcs	Maint Contract -Other Equipment	Contractual maintenance services on other non-L...
922600	Restricted-FBO-ContractSvcs	SERVICE AGREEMENTS-Other	For other contractual service agreements betwee...
928355	Project request	Projcts-Repair/Maint/Replace-Noncap	For Informal Non-capitalized projects - Project...
928355	Project request	Projcts-Capital/Replace/Imprv-Capitalize	For Informal Capitalized projects - Projcts th...

- iii. After typing in your search criteria, select the down red arrow  or just select the Enter key on your keyboard to filter the list. The up red arrow  will undo the filter and return you to the complete list.
- d. Sorting:
 - i. The default Banner Account Code pop up view is set to sort alphabetically by Category.
 - ii. You can switch the sort view by clicking on the small grey box  in the column you wish to sort by. A small gray triangle  will indicate which column the data is sorted by. In the screen shot above, you can see that the data is sorted by the Category column.



Select Value - Banner Account Code

Banner Account Code: 1[3] 9[88] G[1] All[92]

Banner Account Code	Category	Description	Account Use
928230	Repairs/Maint	PREVENTIVE MAINT-BLDGS	Repairs/Maint work associated with preventive m...
928230	Repairs/Maint	REPAIRS & MAINT BUILDINGS	Labor and materials to repair, maintain, overha...
928230	Repairs/Maint	Repairs/Maint-FM Work Request	For basic repairs/maintenance on Buildings requ...
928330	Repairs/Maint	GROUND REPAIR & MAINT	Repairs/Maint for grounds
928190	Repairs/Maint	STRUCTURES	Labor and materials to repair, maintain, overha...
928220	Repairs/Maint	EQUIPMENT	For repairs/maintenance on Equipment
928270	Repairs/Maint	MAINT.	Repairs/Maint to HVAC systems, including repair...
928260	Repairs/Maint	MAINT.	Repairs/Maint to electric systems within buildings
928240	Repairs/Maint	MAINT.	Lot paving and repairs
928250	Repairs/Maint	Repairs/Maint. Strip lots	Lot striping

Click the small grey box at the column heading to sort descending and ascending

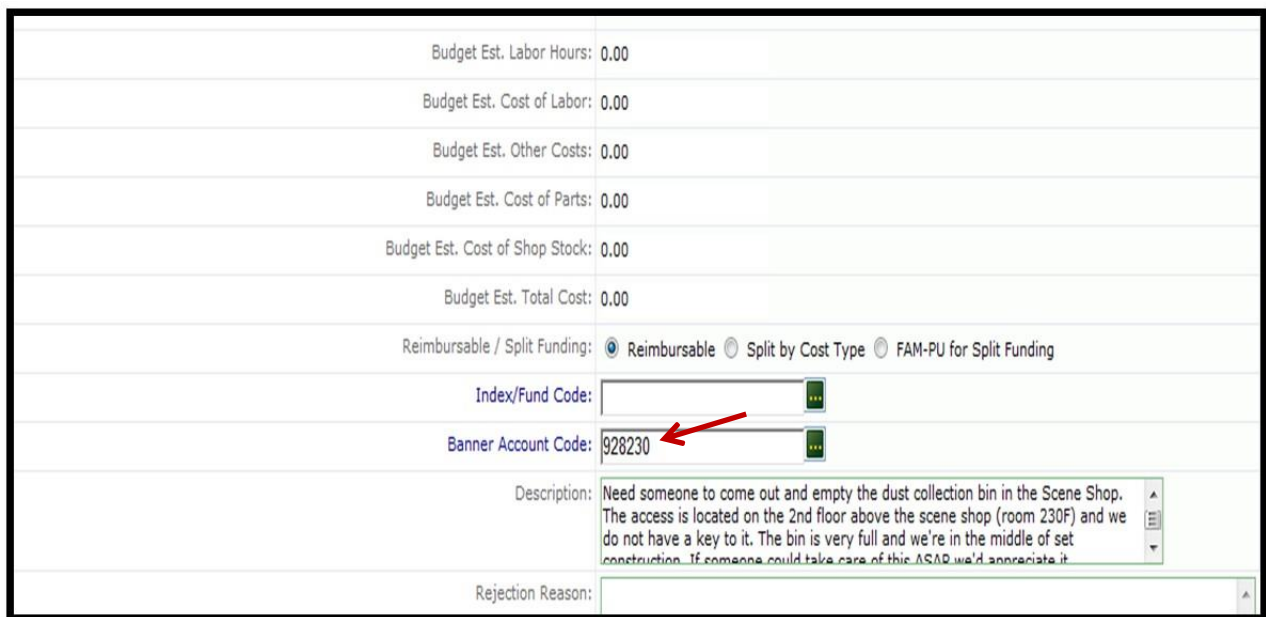


Select Value - Banner Account Code

Banner Account Code: 9[1] All[1]

Banner Account Code	Category	Description	Account Use
928230	Repairs/Maint	REPAIRS & MAINT-OTHER	Repairs/Maint for any other product or piece of...

d. After filtering the list and locating the applicable Banner Account Code for the work that is to be completed, click the Banner Code to select it. The Banner Account Code selected will populate the Banner Account Code field on the work request.



Budget Est. Labor Hours: 0.00

Budget Est. Cost of Labor: 0.00

Budget Est. Other Costs: 0.00

Budget Est. Cost of Parts: 0.00

Budget Est. Cost of Shop Stock: 0.00

Budget Est. Total Cost: 0.00

Reimbursable / Split Funding: Reimbursable Split by Cost Type FAM-PU for Split Funding

Index/Fund Code: []

Banner Account Code: 928230

Description: Need someone to come out and empty the dust collection bin in the Scene Shop. The access is located on the 2nd floor above the scene shop (room 230F) and we do not have a key to it. The bin is very full and we're in the middle of set construction. If someone could take care of this ASAP we'd appreciate it.

Rejection Reason: []



Contact Information for Problems or Questions

If you have questions concerning these updates, please feel free to contact one of us below:

1. **Pamela Duff**, Business Solutions Coordinator, Facilities Information Systems – For ARCHIBUS role access, technical questions and issues resolution: email pduff@uncc.edu or call 7-0552.
2. **Noella Paquette**, Accounting Technician, Facilities Business Office – For changes to Departmental Financial Account Manager access for ARCHIBUS, email njpaquet@uncc.edu or call 7-0547.
3. **Kim Seamans**, Senior Financial Reporting Accountant, Reporting & Fixed Assets – For all other Banner Account Code questions, email kseamans@uncc.edu or call 7-5752.