ARCHIBUS User Information for Banner Account Codes:

ARCHIBUS Financial Account Manager (FAM) views provide access to add the Banner Account Code for Reimbursable department-assigned requests. The Banner code data view provides a brief description of each Banner Account code to assist with the selection. Below is an overview of approving a Work Request from within the Financial Account Manager (FAM) role and how to search and add the Banner Account code.

Banner Codes:

1. When approving ARCHIBUS work requests, Motor Fleet Reservations, etc., the Banner Account Codes should be selected using the field’s data list instead of entering it manually.

2. Selecting the Banner Account Code: Select the ellipse button on the Banner Account Code field to display the new Banner Account Code data list view.
a. The Banner Account Code pop-up view has two columns to assist in 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 simply enter the account code in the box at the top of the Banner Account Code.
   ii. If you want to filter by Category, Description, or Account Use, type keywords into the text field boxes available at the top of each column.
   iii. After typing in your search criteria, select the <Enter> key on your keyboard to filter the 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 arrow at the end of a column. Sorting by ascending (smallest to largest) order will be indicated by an up blue arrow 🔼. A down blue arrow ❌ will indicate the data is sorted in descending (largest to smallest) order.
iii. After filtering the list and locating the applicable Banner Account Code for the work that is to be completed, click to select the Banner Code.
e. Populating the Banner Code on the Approve Form:
The Banner Account Code selected will populate the Banner Account Code field on the work request.

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 Analyst, Office of OneIT | Facilities Information Systems – For ARCHIBUS role access, technical questions, and issues resolution: email pduff@uncc.edu or call 7-0552.

2. **Noella Paquette**, IMP | Accounting Technician, FM Finance and Business Operations – For changes to Departmental Financial Account Manager (FAM) access for ARCHIBUS, email npaquet@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.