

Northeastern Financial Planning, Strategy and Analytics

Banner Finance Access Automation Instructions

Introduction:

Purpose: Banner Finance Access Automation is a key part of the university's system of financial control and is necessary both to assure that the university has appropriate records relating to the granting of finance system access, and to ensure the security, confidentiality, and appropriate use of any information extracted from university financial systems.

Access to Banner Data & Authorization Process: To be granted access to the Banner Financial System, or to have changes made to a user's existing access, an applicant must in every case submit to the Office of Financial Planning, Strategy and Analytics a Banner Finance Access request form. The level of finance access granted upon review and approval of this access request will determine what types of transactions an individual may enter into with reference to which financial accounts. It will also determine what financial information they may view and/or update. This access request form must be complete and include a rationale for the requested access. The signature of the applicant's direct supervisor is required. Incomplete applications will not be accepted.

I. Instructions for completing the Banner Finance Access form:

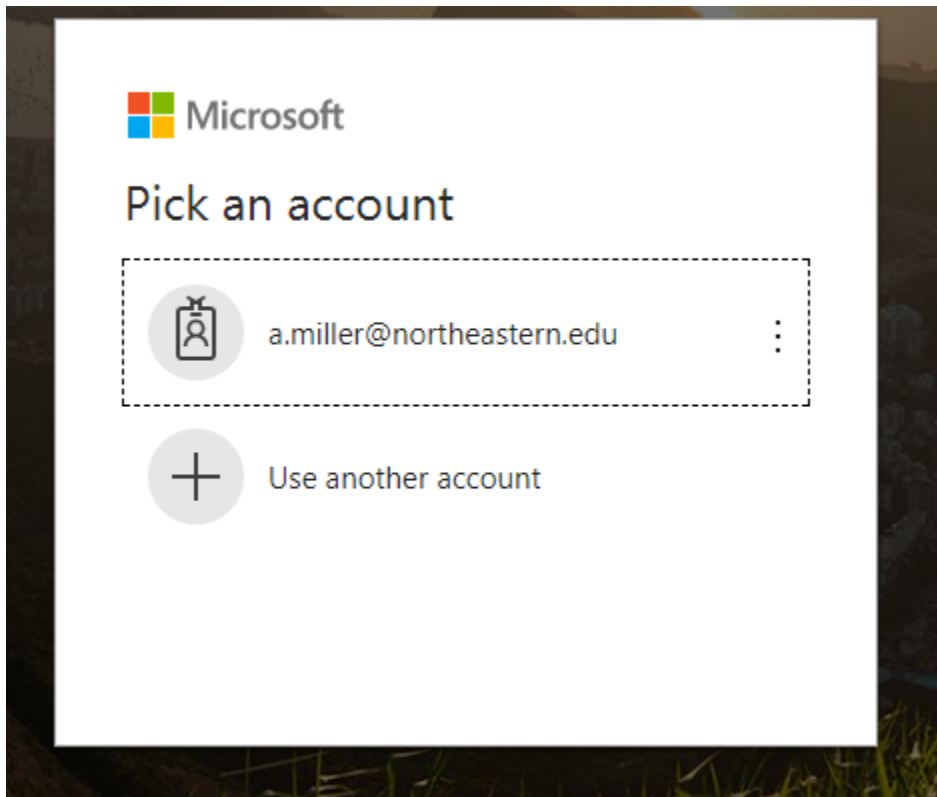
The **Banner Finance Access Form Required** be completed for the following actions pertaining to University Financial Access such as:

- a. SSB Queries
- b. SSB Requisition Creating
- c. SSB Budget Transfer
- d. SSB Requisition/Invoice approval
- e. SSB PO Creating (Restricted access for Purchasing Team Only)
- f. INB access
- g. Eprint Department Reports
- h. Eprint Payrolls Reports

1) Access the form Using the following link:

[Northeastern University - SharePoint Automation – Banner Finance](#)

2) You will then be required to enter your MyNEU credentials



3) Click on the “USERS” Block

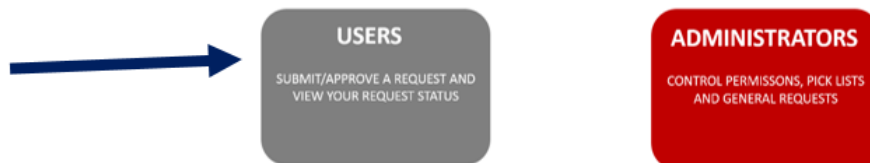
Northeastern SharePoint Home > Finance > Intranet



Northeastern University
Office of the Chief Financial Officer

BANNER FINANCE

Banner Finance is the financial management systems database for Northeastern University. This includes invoices, purchase orders, encumbrances, journal entries, etc. In order to access this system, you must submit a request.



4) Next click on “Submit a new request”

BANNER FINANCE ACCESS REQUEST

[Submit a new request](#)

My Requests | My Approvals

Request ID	Request Type	Access Type	Account Holder Name	Supervisor Name	Action	Status	Created
<p>MY REQUESTS</p> <p>Refresh</p> <p>Selected Filter: Default Quick Search: All fields</p>							

5) The form will automatically populate the following fields for the submitter:

- Supervisor Information
- Account Holder Information

Form ID: 201882152153

* Required fields

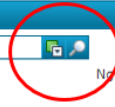
SUPERVISOR INFORMATION			
First Name:	David	Last Name:	Burke
Department:	Off of Fin Plan,Strategy &Analytics	Division:	DIV02
Title:	Sr AssocDir-Financial Planning	Work Email:	da.burke@northeastern.edu
Work Phone:	617-/373-7794		

ACCOUNT HOLDER INFORMATION			
On Behalf:	<input type="text" value="Search"/>		
First Name:	Nhu	Last Name:	Nguyen
Department:	Off of Fin Plan,Strategy &Analytics	Division:	DIV02
Title:	Financial Operations Analyst	Work Email:	nhu.nguyen@northeastern.edu
Work Phone:	617/3733957	NU ID: *	<input type="text" value="Provide a valid 9 digit NUID"/>



6) If you are submitting a request for yourself, **please enter your 9 digits NUID**
 ***If you are submitting the request for someone else, please click on the magnifying glass from the “on behalf” field. A search box will pop up, search for the person name by typing in their last name and click on the magnifying glass within the search box. Select the name of the person and click ok. Upon clicking ok, you will now see 3 fields: Supervisor Information, Requester Information, and Account Holder Information. Please verify and **enter the account holder 9 digits NUID** and move on to the next step.

ACCOUNT HOLDER INFORMATION			
On Behalf:	<input type="text" value="Search"/>		
First Name:	Nhu	Last Name:	Nguyen
Department:	Off of Fin Plan,Strategy &Analytics	Division:	DIV02
Title:	Financial Operations Analyst	Work Email:	nhu.nguyen@northeastern.edu
Work Phone:	617/3733957		



ACCOUNT HOLDER INFORMATION			
On Behalf:	<input type="text" value="McKenney"/>		
First Name:	Scot	Last Name:	Nguyen
Department:	Off of Fin	Division:	DIV02
Title:	Assoc Dir	Work Email:	nhu.nguyen@northeastern.edu
Work Phone:	617/3733957		

TYPE OF ACCESS	
REQUEST TYPE	
<input checked="" type="radio"/> New Access	
<input type="radio"/> Additional Access	

EMPLOYEEMENT TYPE	
<input checked="" type="radio"/> Faculty & Staff	
<input type="radio"/> Temp-non Student/Consultant	
<input type="radio"/> Student Worker/Co-op	

Work Phone: 617/3733957

Search

Find: mckenney, s

Results:

Display Name
McKenney, Scot

Page 1

OK Cancel

SUPERVISOR INFORMATION			
First Name:	David	Last Name:	Burke
Department:	Off of Fin Plan,Strategy &Analytics	Division:	DIV02
Title:	Sr AssocDir-Financial Planning	Work Email:	da.burke@northeastern.edu
Work Phone:	617-373-7794		

REQUESTER INFORMATION			
First Name:	Nhu	Last Name:	Nguyen
Department:	Off of Fin Plan,Strategy &Analytics	Division:	DIV02
Title:	Financial Operations Analyst	Work Email:	nhu.nguyen@northeastern.edu
Work Phone:	617/3733957		

ACCOUNT HOLDER INFORMATION			
On Behalf:	<input type="text" value="McKenney, Scot"/>		
First Name:	Scot	Last Name:	McKenney
Department:	Off of Fin Plan,Strategy &Analytics	Division:	DIV02
Title:	Assoc Dir - Budget;Part-Time Lecturer	Work Email:	Ds.McKenney@northeastern.edu
Work Phone:	617/3735979	NU ID: *	<input type="text" value="Provide a valid 9 digit NUID"/>

7) Type of Access:

You will need to select one of the given options under “Request Type”, “Employee Type” (Please keep in mind that the user must have an active sponsored account if the employment status is Temp, consultant, student or coop), “Access Type” and “Approval Type” (for all regular Banner Finance access request please select standard. ORAF team requesting for PI to gain access to the newly created fund, please select Principal Investigator, and SABO team requesting for Advisors to gain access to student activity fund please select “Student group fund.”)

For the “Justification field”, you will be required to type in a brief description as to why the user needs access to the Banner Finance function(s) you selected.

TYPE OF ACCESS			
REQUEST TYPE <input checked="" type="radio"/> New Access <input type="radio"/> Additional Access		ACCESS TYPE <input checked="" type="radio"/> SSB <input type="radio"/> INB <input type="radio"/> SSB & INB	
EMPLOYEE TYPE <input checked="" type="radio"/> Faculty & Staff <input type="radio"/> Temp-non Student/Consultant <input type="radio"/> Student Worker/Co-op		JUSTIFICATION * <input type="text" value="Why do you need Banner Finance Access?"/>	
		APPROVAL TYPE <input checked="" type="radio"/> Standard <input type="radio"/> Principal Investigator (PI) & Unique request <input type="radio"/> Student group fund - require SABO approval	
<small>For more information on sponsored accounts, Click here</small>			

8) SSB Functions

Please check all SSB functions you would like to request access.

Keep in mind that when you check “Online Approvals” a new field called “Online Approvals” will populate. You will be required to set the limit of the approval type and approval dollars amount.

To set approval limit please click on + New Type. A Banner Finance – Add/Edit Online Approvals box will pop up. Please click on the drop down and set the approval type and Amount limit. Click add.

SSB FUNCTIONS

FUNCTIONS *

- Banner queries
- Budget Transfer
- Create Requisitions
- Purchase Orders (Procurement team only)
- Online Approvals

ADDITIONAL EPRINT REPORTS

- Standard Department ePrint
- Payrolls ePrint – Org Level
- Payrolls ePrint – Part-time/Students
- Payrolls ePrint – Division Level

ONLINE APPROVALS

+ New Type X Delete

Approval Type	Amount
No items to display.	

Banner Finance - Add/Edit Online Approvals

Approval Type: Research Requisitions Amount: All Dollar Amounts

Cancel Add

9) INB Function (If this request is for SSB only you can skip this step)

Under INB Roles please click on + New Roles. A Banner Finance – Add/Edit INB Roles box will pop up. Please click on the drop-down and select the INB Role you are requesting for then click add.

If you are requesting more than 1 INB Roles, please repeat this step for each role.

INB ROLES

+ New Role X Delete

Role	Oracle Role
No items to display.	

Banner Finance - Add/Edit INB Roles

Role: Select an item

Oracle Role: Amount (USD):

INB Tolerance (%):

Authorizations:

- Post in Accrual Period
- Exp End Date Posting
- ACH Override
- NSF Override

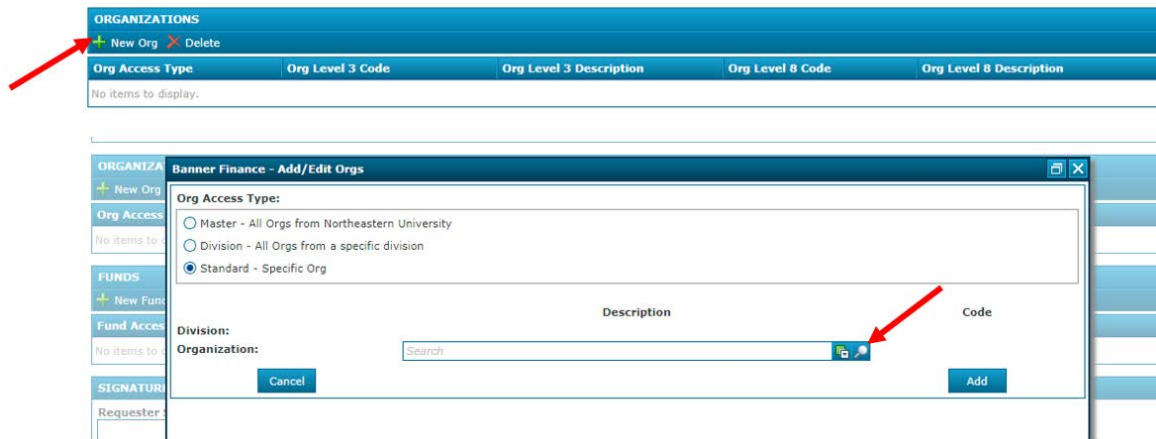
Cancel Add

10) Organizations:

Under Organizations, please click on + New Org. A Banner Finance – Add/Edit Orgs box will pop up. Please make a selection from the given options under Org Access Type. If you know the org # or division # you can type it in the search box, then click add (repeat for each org you would like to add).

If you need to look up the org# or division #, please click on the magnifying glass. A search box will pop up, type in the name of the org or division you would like to look up and click on the magnifying glass within the search box. A list of division or org will be generated, please make a selection and click okay. The search box will disappear, and now you see your selection information in the Banner Finance – Add/Edit Orgs box. Click add and repeat this step as many time as needed.

*** Please keep in mind that if this request is at Division level, you will be required to submit one form for each Division ***



11) Funds:

Under Funds, please click on + New Fund. A Banner Finance – Add/Edit Funds box will pop up. Please pick a selection from the given options under Fund Access Type. If you know the Fund # or Fund Type # you can type it in the search box, then click add (repeat for each Fund or Fund Type you would like to add).

If you need to look up the Fund # or Fund Type #, please click on the magnifying glass. A search box will pop up, type in the name of the Fund name or Fund Type name you would like to look up and click on the magnifying glass within the search box. A list of Fund or Fund Type will be generated, please make a selection and click okay. The search box will disappear, and now will you see your selection information in the Banner Finance – Add/Edit Funds box. Click add and repeat this step as many time as needed.

FUNDS

+ New Fund - Delete

Fund Access Type	Fund Type Code	Fund Code
No items to display.		

Banner Finance - Add/Edit Funds

Fund Access Type:

Master - All funds from Northeastern University
 Specific - Fund Type
 Specific - Fund
 Standard - All funds associated with the selected orgs

Fund Type:	Code	Description
Fund:	Search	

Cancel Add

12) Review all information on the form and click submit at the bottom of the page.

SIGNATURES AND APPROVAL LEVELS

Requester Signature

Supervisor Signature

Supervisor Comments

SABO Signature

SABO Comments

Division Signature

Division Comments

Office of Financial Planning Signature

Office of Financial Planning Comments

Cancel Submit

II. To find where in the process Banner Finance Access form is:

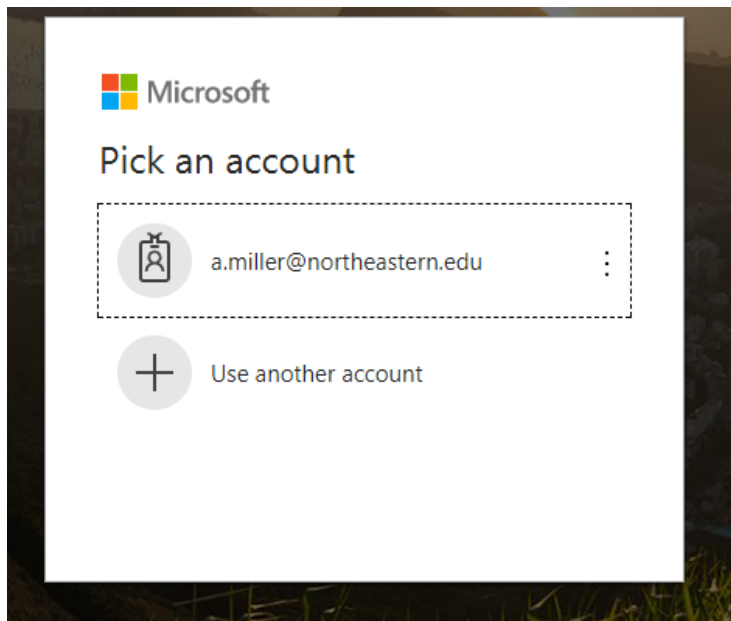
Once approvals and actions required have been completed you “the submitter” will receive an email notification.

During the workflow you can track where your Banner Finance Access form is at any time as follows:

1) Access the form Using the following link:


[Northeastern University - SharePoint Automation – Banner Finance](#)

2) You will then be required to enter your MyNEU credentials



3) Click on the “USERS” Block

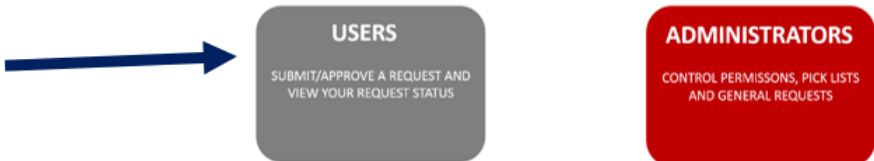
Northeastern SharePoint Home > Finance > Intranet



Northeastern University
Office of the Chief Financial Officer

BANNER FINANCE

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USERS
SUBMIT/APPROVE A REQUEST AND
VIEW YOUR REQUEST STATUS

ADMINISTRATORS
CONTROL PERMISSIONS, PICK LISTS
AND GENERAL REQUESTS

4) This will bring you to a screen where you’ll see your Banner Finance Access form and provide you with the following information:

- Request ID: Is the form number
- Status: Which step/department your form is currently with
- Date created: Date which the form was originally submitted

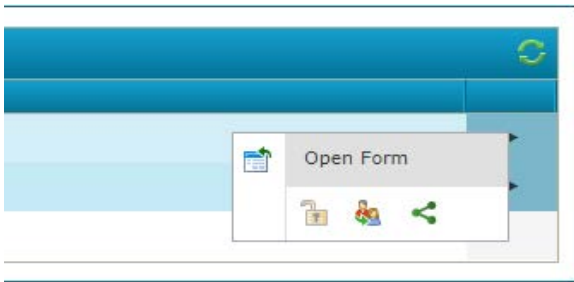
BANNER FINANCE ACCESS REQUEST

Submit a new request

Request ID	Request Type	Access Type	Account Holder Name	Supervisor Name	Action	Status	Created
201841152238	New Access	S58	Nguyen, Nhu	Burke, David	Approved by Supervisor	Waiting Budget Office	4/11/2018
201841150907	New Access	S58	Nguyen, Nhu	Burke, David	Approved by Budget Office	Complete	4/11/2018
201841146933	New Access	S58 & DNB	Nguyen, Nhu	Burke, David	Rejected by Budget	Request Denied	4/11/2018
2018316142952	New Access	S58	Nguyen, Nhu	Burke, David	Approved by Budget	Complete	3/16/2018
2018316142340	New Access	S58	Nguyen, Nhu	Burke, David	Rejected by Budget	Request Denied	3/16/2018
2018316142000	New Access	S58	LeBrun, Chris	Burke, David	Submitted	Waiting Supervisor Approval	3/16/2018
2018316141320	New Access	S58	Mitchell, Peter	Cramer, Steve	Submitted	Waiting Supervisor Approval	3/16/2018
2018316103915	New Access	S58	Nguyen, Nhu	Burke, David	Submitted	Submitted	3/14/2018

If you need to review or approve a submitted request clicked on “My Approval” tab, at the very right-hand corner you will see a black triangle shape, click on it and select “Open Form.” You will be directed to the request form, from there, please review the form and scroll to the very bottom do decide whether you would like to “Reject” or “Approve” the request.

Folio	Activity Name	Task Start Date
Nhu Nguyen - 201854152155	Supervisor Approval	3:32 PM
Sahar Daoudi Nejm - 2018413161224	Supervisor Approval	4/13/2018



Reject

Review

Approve

Below is a list of contacts based on the status of your form:

- Supervisor – This means your direct supervisor hasn't approved the form. Please contact them directly for any questions.
- Request Denied – This mean your request will not be process.
- Waiting for OFPSA – Please contact Nhu Nguyen in the Office of Financial Planning, Strategy and Analytics via email at Nhu.nguyen@northeastern.edu

If you have any additional questions regarding the Banner Finance Access form or process the Office of Financial Planning, Strategy and Analytics:

- Nhu Nguyen
 - at extension # 3957
 - email: Nhu.nguyen@northeastern.edu
- David Burke
 - at extension # 7794
 - email: da.burke@northeastern.ed