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.

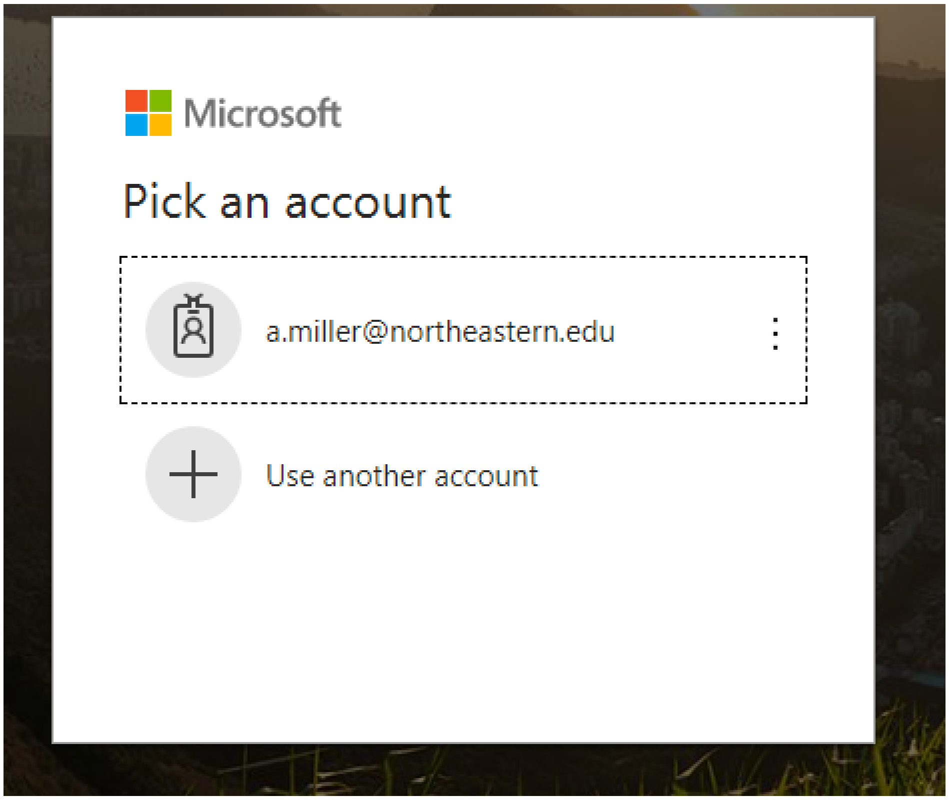
I. Instructions for completing the Banner Finance Access form:

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

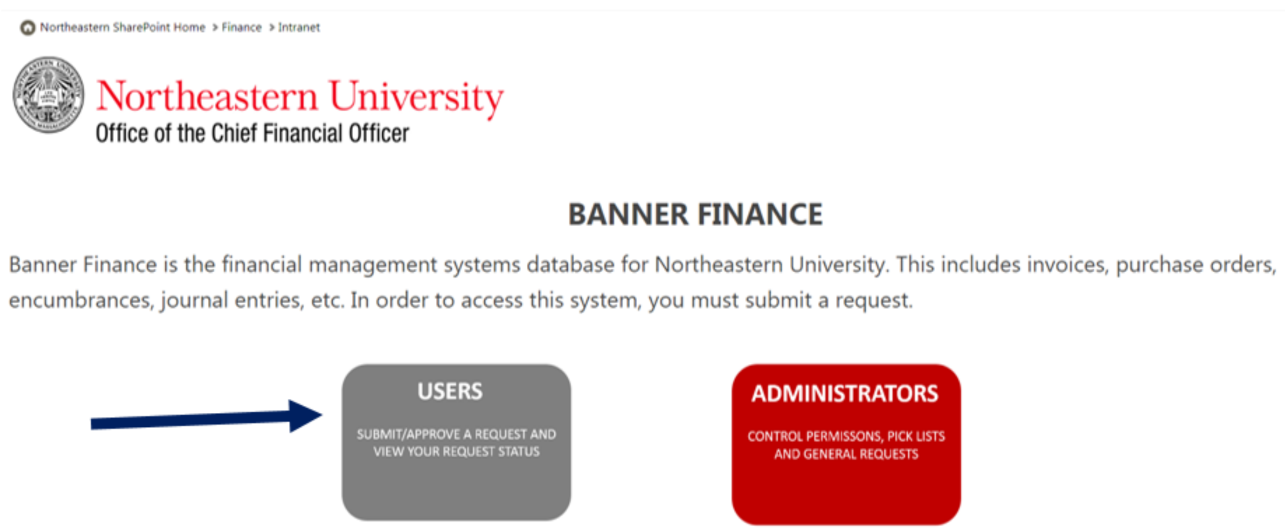
a. SSB Queries
b. SSB Requisition Creating
c. SSB Budget Transfer
d. SSB Requisition/Invoice approval
e. SSB PO Creating (Restricted access for Purchasing Team Only)
f. INB access
g. Eprint Department Reports
h. Eprint Payrolls Reports

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

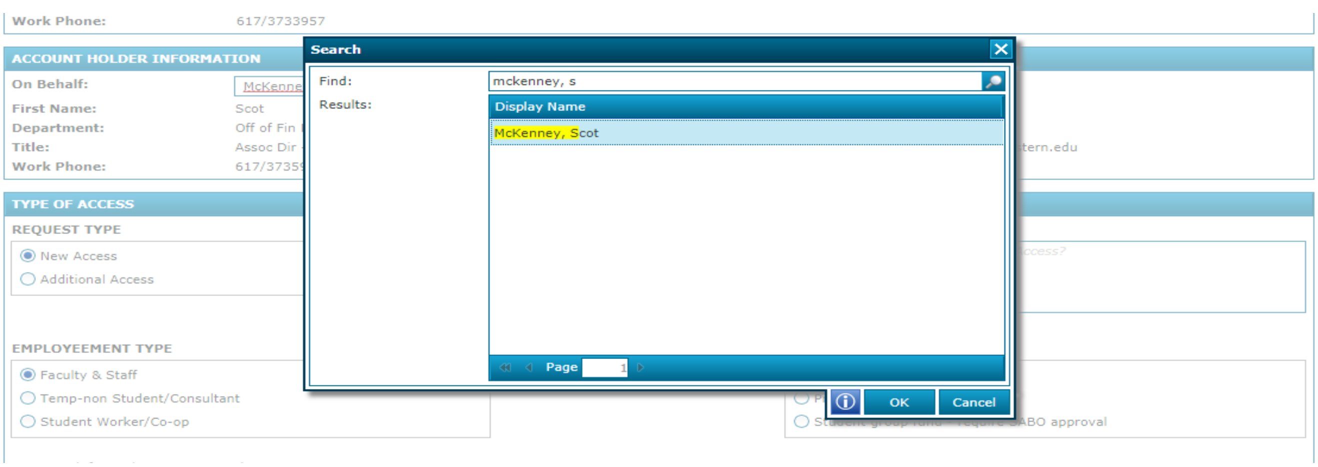


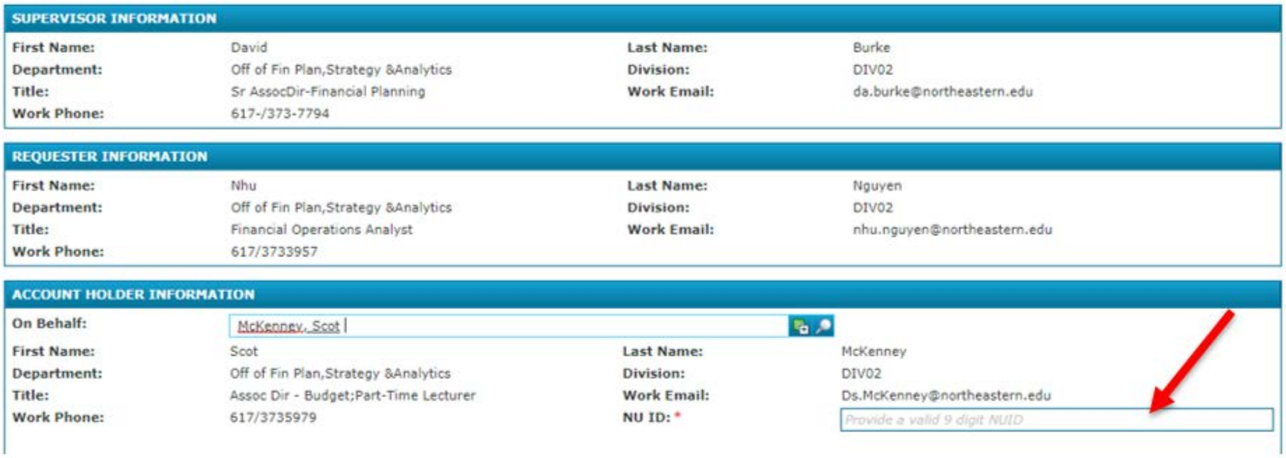
4) Next click on "Submit a new request"

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

- Supervisor Information
- Account Holder Information

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.





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		

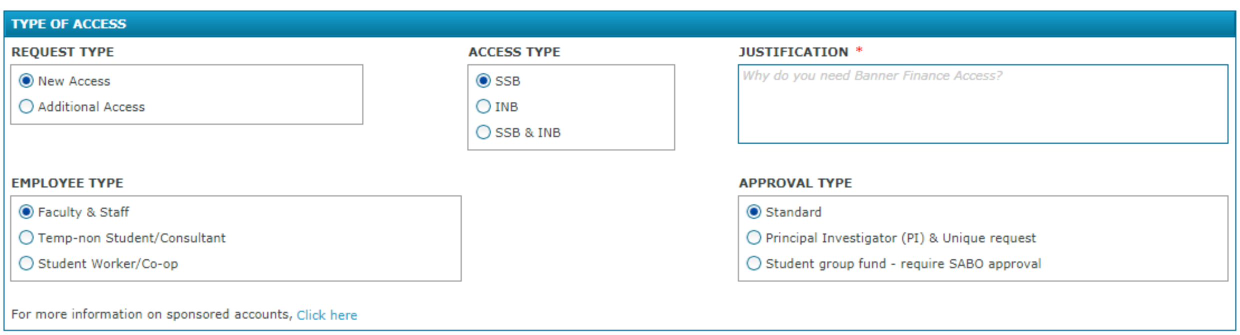
ACCOUNT HOLDER INFORMATION

On Behalf:	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: *	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
- (•) New Access
- ( ) Additional Access

ACCESS TYPE
- (•) SSB
- ( ) INB
- ( ) SSB & INB

JUSTIFICATION *

Why do you need Banner Finance Access?

EMPLOYEE TYPE
- (•) Faculty & Staff
- ( ) Temp-non Student/Consultant
- ( ) Student Worker/Co-op

APPROVAL TYPE
- (•) Standard
- ( ) Principal Investigator (PI) & Unique request
- ( ) Student group fund - require SABO approval

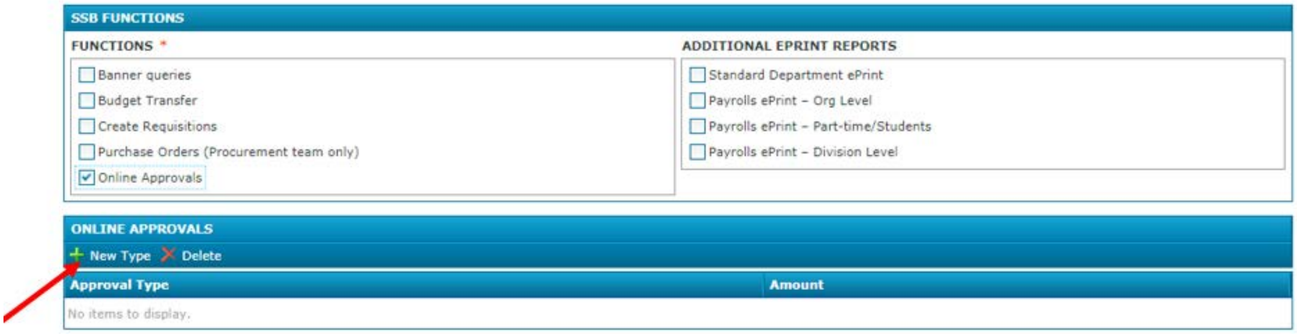
For more information on sponsored accounts, Click here

8) SSB Functions

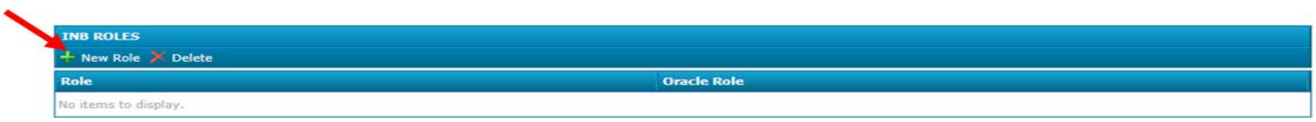
Please check all SSB functions you would like to request access.

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.



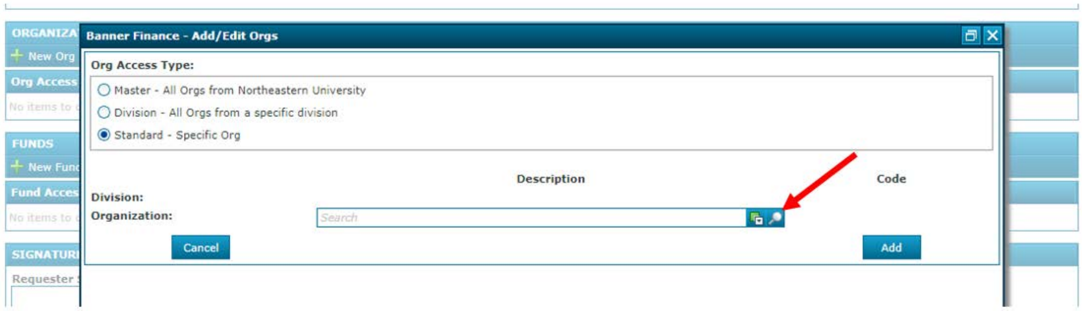
9) INB Function (If this request is for SSB only you can skip this step)
Under INB Roles please click on + New Roles. A Banner Finance – Add/Edit INB Roles box will pop up. Please click on the drop-down and select the INB Role you are requesting for then click add.
If you are requesting more than 1 INB Roles, please repeat this step for each role.



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).

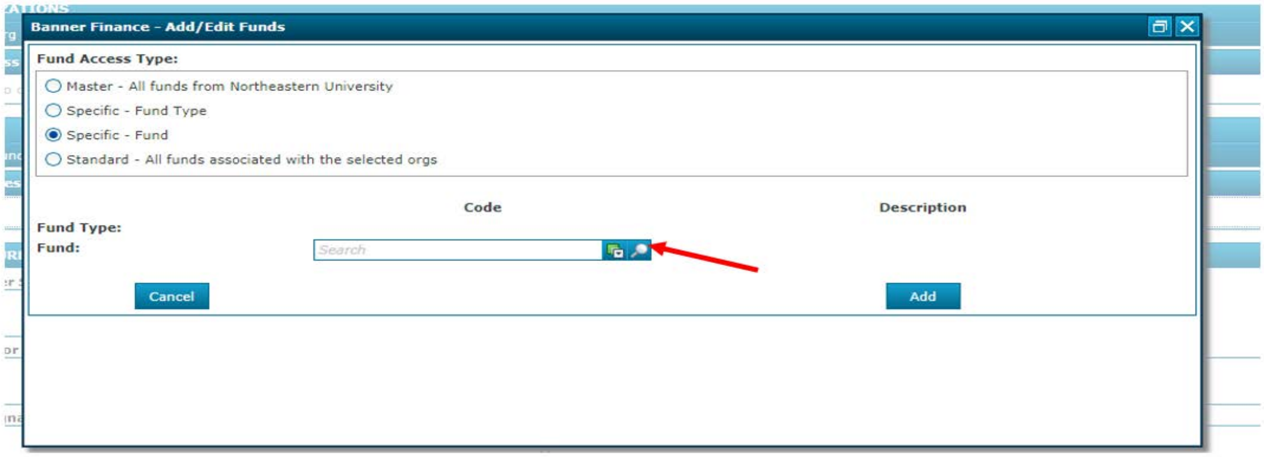
If you need to look up the org# or division #, please click on the magnifying glass. A search box will pop up, type in the name of the org or division you would like to look up and click on the magnifying glass within the search box. A list of division or org will be generated, please make a selection 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 ***

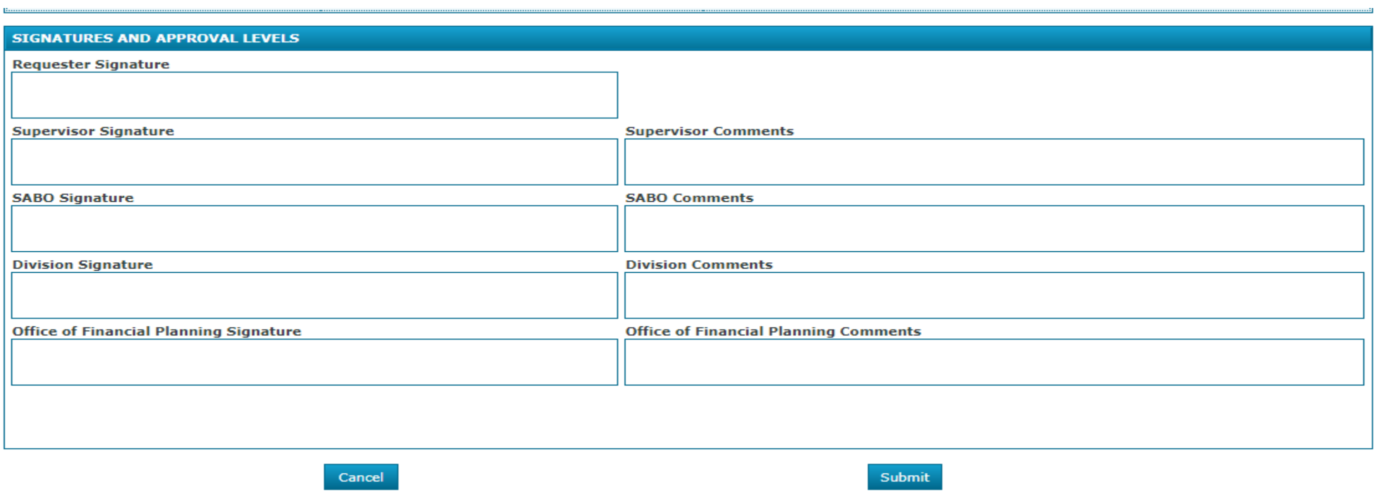


11) Funds:
Under Funds, please click on + New Fund. A Banner Finance – Add/Edit Funds box will pop up. Please pick a selection from the given options under Fund Access Type. If you know the Fund # or Fund Type # you can type it in the search box, then click add (repeat for each Fund or Fund Type you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



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



II. <u>To find where in the process Banner Finance Access form is:</u>

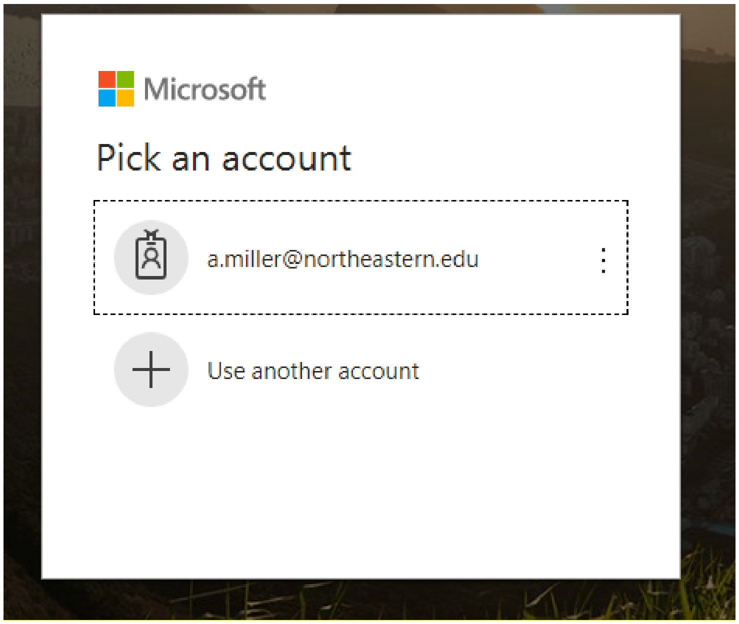
Once approvals and actions required have been completed you “the submitter” will receive an email notification.

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

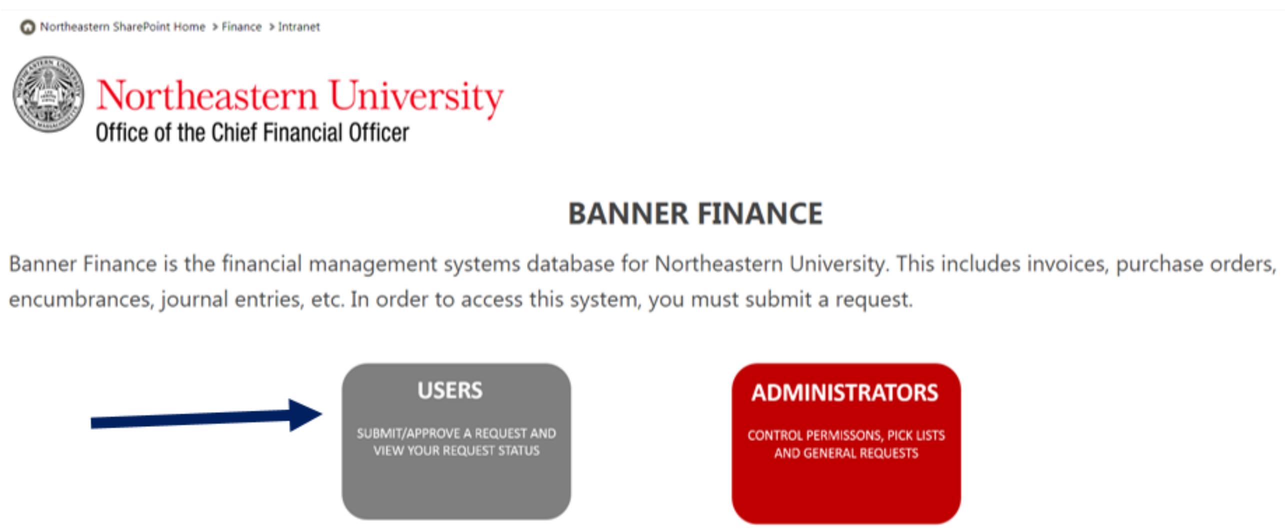
1) Access the form Using the following link:

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

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

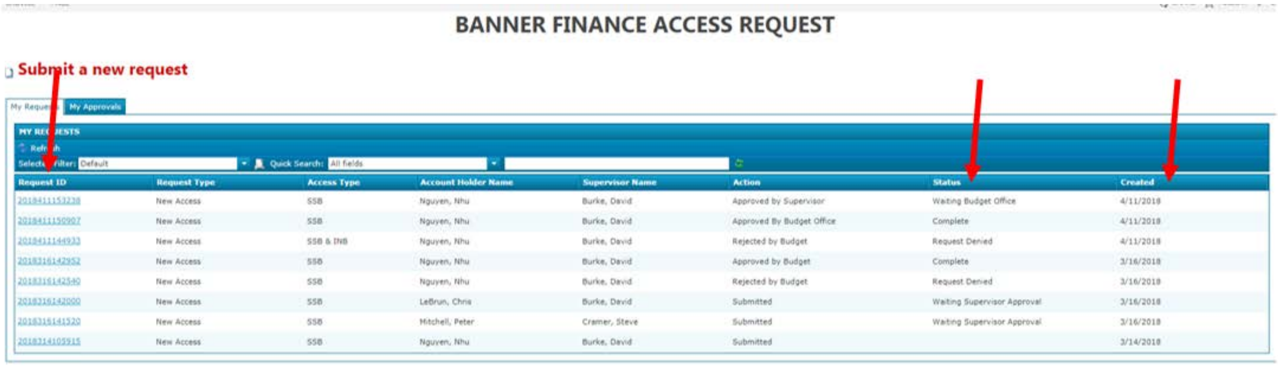


3) Click on the "USERS" Block

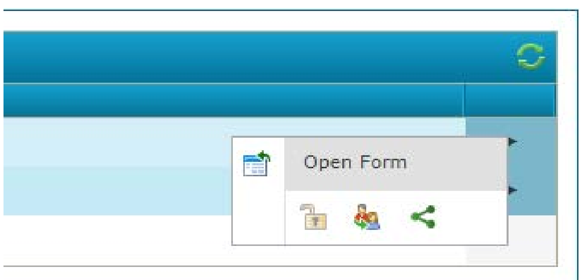


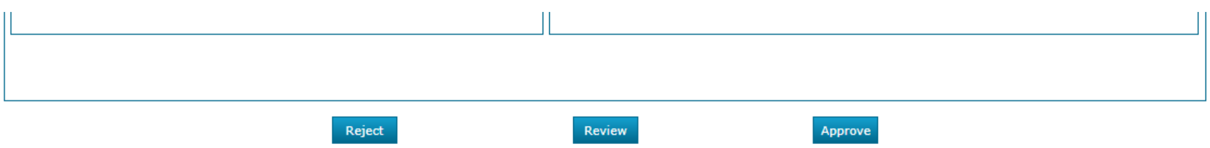
4) This will bring you to a screen where you'll see your Banner Finance Access form and provide you with the following information:

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



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.





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