Finance Policies, Procedures, and System Access
Banner Finance Applications

Two (2) Banner Applications:
1. Self Service Banner (SSB)
2. Administrative (Banner 9)

Today we will be reviewing how to use SSB:

• Benefits of Self Service Banner:
  – Easy to Use
  – Customize your own management reports online
  – Ability to export to Microsoft Excel
  – Point and click access to information

• Other Applications we will be reviewing today:
  – Highlander eMerchant
  – Chrome River
  – Anthony Travel
NJIT Finance will follow the University reopening guidelines that can be found using the following link:

- COVID-19 Update

Mission Statement
The Office of the Senior Vice President for Finance and Chief Financial Officer is committed to supporting the instruction, research, and public service mission of the university by setting the appropriate tone, stressing the importance of ethical behavior, business transparency, a trusting environment, and personal credibility built on effective interpersonal skills. Of critical importance is the ability to communicate that this office oversees a capable and principled operation of financial professionals.

Financial management and accountability, integrity, strategic thinking, leadership, communication, and team-building are all core competencies necessary to lead this Division. Applying these competencies supports the Finance Division’s mission of monitoring, protecting, and preserving NJIT’s financial resources by applying industry “best practices”, ensuring long-term financial stability, and adapting to an environment of limited state support. Our objective is to consistently provide timely and accurate financial reports compliant with State and Federal financial reporting guidelines.

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Related Links:
- Fraud Prevention Hotline
Website: https://www.njit.edu/finance/office-senior-vice-president-and-cfo/

- How to review your budget: Banner Finance
- How to spend the money in your budget: Highlander eMerchant
- How to get reimbursed for business expenses: Chrome River
- How to book airline, train, hotel: Anthony Travel (preferred)
- Training Resources
  - Online training is available via Finance Website
  - University Bulletin announcing training opportunities: First week of Fall Semester
Finance Policies and Procedures

NJIT Finance/Business Policies

- Travel
- Business Expense Reimbursement
- Fiduciary Responsibility
- Mobile Device Eligibility
- Procurement
- Faculty Start Up Procedure

**All available on the University Policy Website Page**
NJIT has the following policies and procedures in place for business processes. These policies can be located on the NJIT Finance website under the University Business Policies section or under Catalog of Official University Policies:

- Employee Business Expense Reimbursement Policy
- Start-Up Fund Guidelines
- Fiduciary Responsibility Policy
- Purchasing Policy
- Travel Policy
- NJIT Credit Card Procedure
Financial Systems Security Access

Obtaining Access to Self Service Banner

- **Finance Access Forms** - Go to [https://www.njit.edu/finance/forms-fsi/](https://www.njit.edu/finance/forms-fsi/) for access forms. Once completed send to financesecurity@njit.edu
- **Prerequisite** – must have UCID and general person set-up prior to gaining access to Banner Finance through HR and UIS

Financial Systems Security Applications Considerations:

**SSB Finance: Budget & Queries**
- Access will be limited depending on the Funds and Organizations within the Chart of Accounts that you manage.

**Highlander eMerchant: Entering Requisitions and Approvals**
- The ability to enter/approve purchase orders and invoices will be dependent on your role (Buyer/Browser) setup within the Highlander eMerchant system. (see slide 72 for Buyer/Browser definitions)

**Chrome River: Travel & Expense Approvals**
- Chrome River access is automatically given to all employees
- Dependent on timekeeping setup