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
Online Training

How to Videos and FAQs

http://www5.njit.edu/finance/
Finance Division

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
  - On-line 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