

BANNER FINANCE SELF SERVICE

APPROVAL PROCEDURES ORAL ROBERTS UNIVERSITY



Contact Information

Financial Services

Oral Roberts University

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General Banner Finance Information

As a processor of financial information at ORU, you are certain to have diverse needs that vary widely. To understand the term *financial information*, we need to do more than maintain our books and financial statements. Although these activities remain critical to the financial condition and stability of ORU, the demand for strategic and operational financial information by executive management, budget analysts, and departmental end-users is equally important.

The Banner Finance System is a system that has both the functionality and flexibility to serve multiple users through a common database of financial information. Banner Finance not only responds to accounting requirements, but also addresses our need for strategic and operational information.

Banner gives us the advantage of an easy-to-use query language and report writer and also provides direct access to strategic decision-support information. Overall, the Banner Finance system provides a comprehensive, integrated financial management system that enables us to track, maintain, and process all of our relevant financial data.

ORU & Banner

ORU currently supports the following Banner Systems:

- 1. Banner Advancement 8.4.2**
- 2. Banner Student Accounts 8.5.2**
- 3. Banner Position Control/HR 8.6**
- 4. Banner Financial Aid 8.13**

May 1st, 2012...



May 1st, 2012

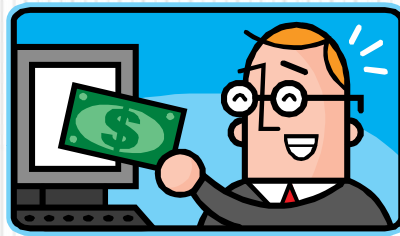
BANNER FINANCE 8.6

SSB vs INB

- ❖ **SSB (Self Service Banner)** – provides web-based access to the Banner System through Vision for end-users.
- ❖ **INB (Internet Native Banner)** – provides Oracle Forms-based access to the Banner System for internal office use in functional areas.

Self Service Banner

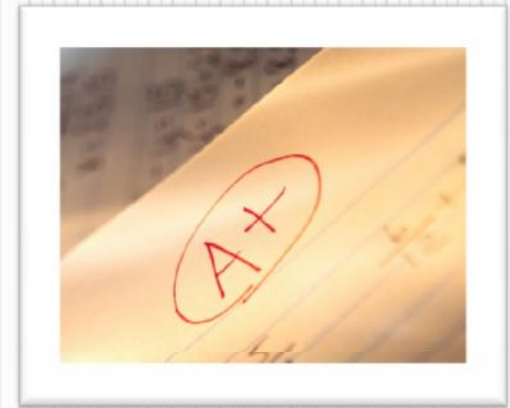
❖ Processing and Approving Purchase Requisitions



❖ Viewing and Managing your Budget

Fintest vs Production

❖ **Fintest – Banner Finance Test System**



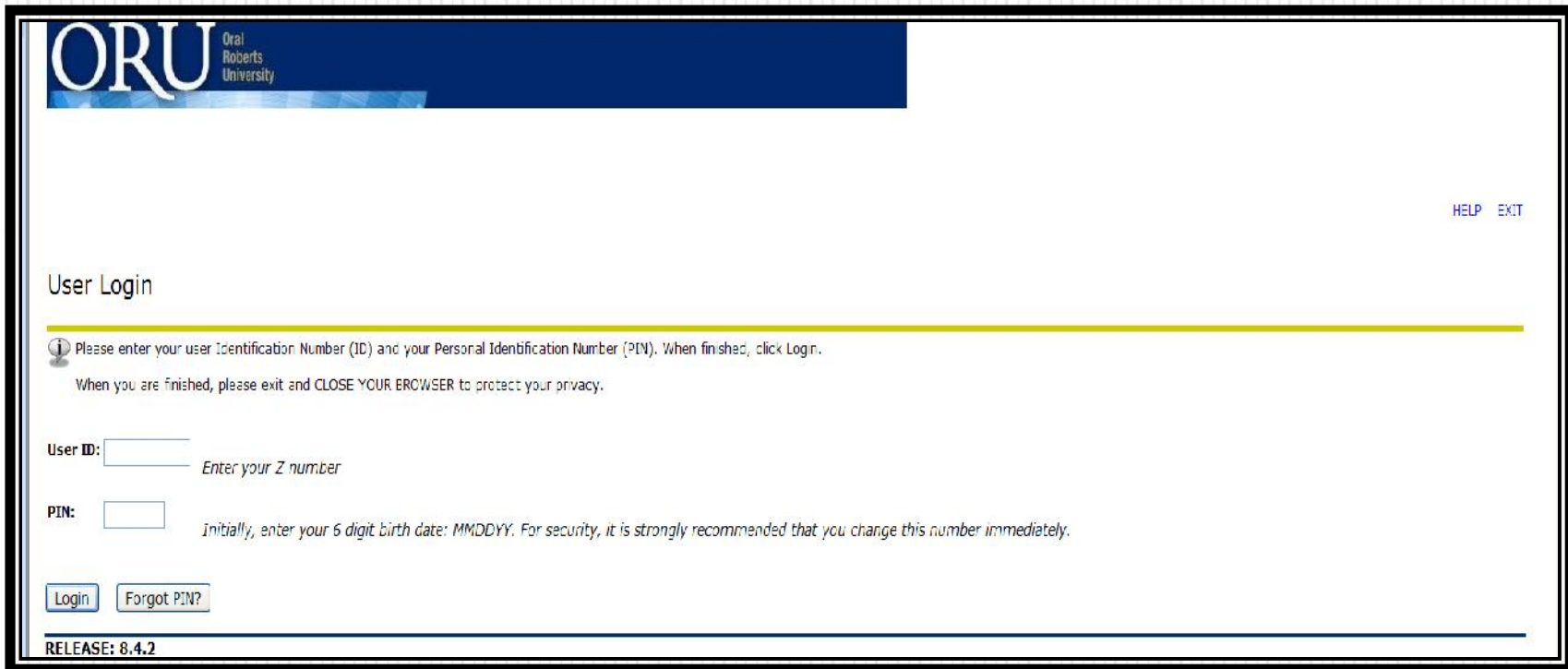
❖ **Production – Banner Finance Live System (May 1st, 2012)**

Approving a Requisition



Log-in to Banner Test System

<http://ntsrv139.oru.edu/fintest>




The screenshot shows the login interface for the ORU Banner Test System. At the top left is the ORU logo with the text 'Oral Roberts University'. In the top right corner, there are links for 'HELP' and 'EXIT'. The main heading is 'User Login'. Below this, a yellow horizontal line separates the instructions from the input fields. The instructions state: 'Please enter your user Identification Number (ID) and your Personal Identification Number (PIN). When finished, click Login. When you are finished, please exit and CLOSE YOUR BROWSER to protect your privacy.' There are two input fields: 'User ID:' with a text box and the prompt 'Enter your Z number', and 'PIN:' with a text box and the prompt 'Initially, enter your 6 digit birth date: MMDDYY. For security, it is strongly recommended that you change this number immediately.' At the bottom left, there are two buttons: 'Login' and 'Forgot PIN?'. At the bottom left of the page, the text 'RELEASE: 8.4.2' is displayed.

ORU Oral Roberts University

HELP EXIT

User Login

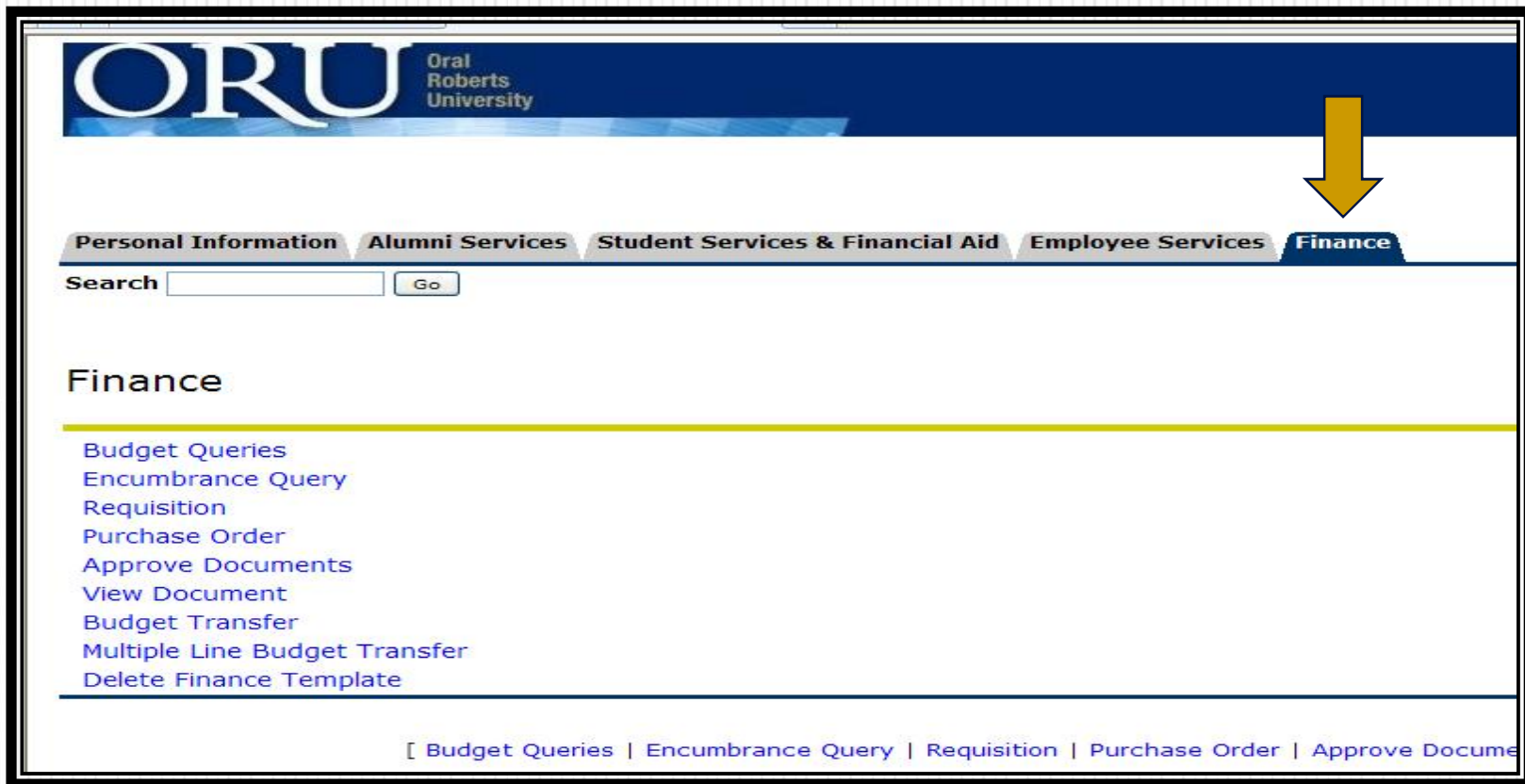
 Please enter your user Identification Number (ID) and your Personal Identification Number (PIN). When finished, click Login.
When you are finished, please exit and CLOSE YOUR BROWSER to protect your privacy.

User ID: Enter your Z number

PIN: Initially, enter your 6 digit birth date: MMDDYY. For security, it is strongly recommended that you change this number immediately.

RELEASE: 8.4.2

Select Finance Tab



The screenshot shows the Oral Roberts University (ORU) website interface. At the top, the ORU logo and name are displayed. Below the header, a navigation bar contains several tabs: Personal Information, Alumni Services, Student Services & Financial Aid, Employee Services, and Finance. The Finance tab is highlighted with a yellow arrow pointing down to it. Below the navigation bar, there is a search bar with the label "Search" and a "Go" button. The main content area is titled "Finance" and lists several links: Budget Queries, Encumbrance Query, Requisition, Purchase Order, Approve Documents, View Document, Budget Transfer, Multiple Line Budget Transfer, and Delete Finance Template. At the bottom of the page, a footer contains a list of links: [Budget Queries | Encumbrance Query | Requisition | Purchase Order | Approve Documents].

ORU Oral Roberts University

Personal Information **Alumni Services** **Student Services & Financial Aid** **Employee Services** **Finance**

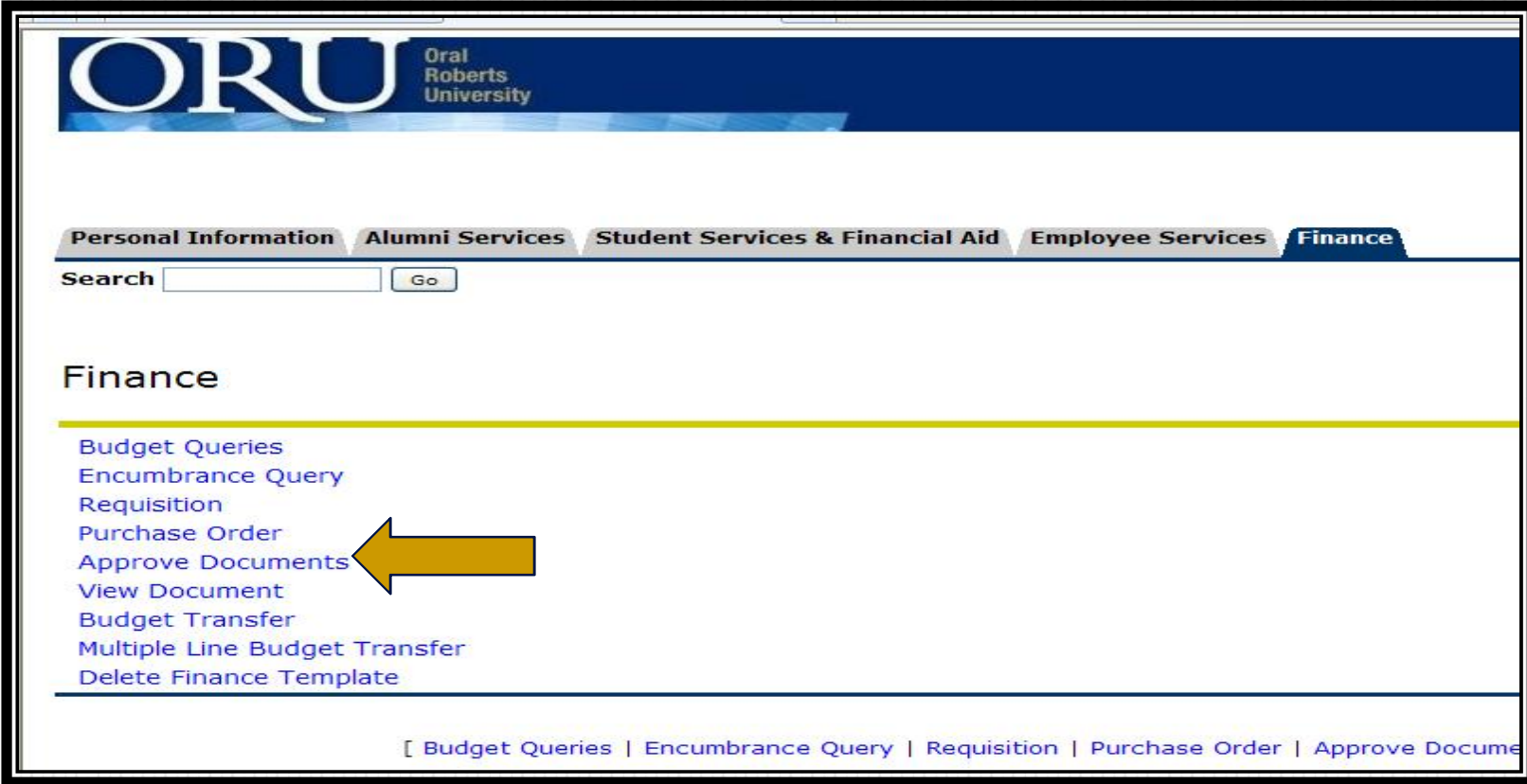
Search

Finance

- [Budget Queries](#)
- [Encumbrance Query](#)
- [Requisition](#)
- [Purchase Order](#)
- [Approve Documents](#)
- [View Document](#)
- [Budget Transfer](#)
- [Multiple Line Budget Transfer](#)
- [Delete Finance Template](#)

[[Budget Queries](#) | [Encumbrance Query](#) | [Requisition](#) | [Purchase Order](#) | [Approve Documents](#)]

Select Approve Documents



The screenshot shows the Oral Roberts University (ORU) website. The header features the ORU logo and the text 'Oral Roberts University'. Below the header is a navigation bar with tabs for 'Personal Information', 'Alumni Services', 'Student Services & Financial Aid', 'Employee Services', and 'Finance'. The 'Finance' tab is selected. Below the navigation bar is a search bar with the text 'Search' and a 'Go' button. The main content area is titled 'Finance' and contains a list of links: 'Budget Queries', 'Encumbrance Query', 'Requisition', 'Purchase Order', 'Approve Documents', 'View Document', 'Budget Transfer', 'Multiple Line Budget Transfer', and 'Delete Finance Template'. A yellow arrow points to the 'Approve Documents' link. At the bottom of the page, there is a footer with a list of links: 'Budget Queries', 'Encumbrance Query', 'Requisition', 'Purchase Order', and 'Approve Documents'.

ORU Oral Roberts University

Personal Information Alumni Services Student Services & Financial Aid Employee Services Finance

Search Go

Finance

- Budget Queries
- Encumbrance Query
- Requisition
- Purchase Order
- Approve Documents
- View Document
- Budget Transfer
- Multiple Line Budget Transfer
- Delete Finance Template

[Budget Queries | Encumbrance Query | Requisition | Purchase Order | Approve Documents]

Enter Approval Parameters

- ❖ Enter Document Number (if known), otherwise leave blank to see all documents awaiting your approval
- ❖ To see only those documents for which you are the next approver, select that radio button and Submit Query



The screenshot shows the 'Approve Documents' page of the Oral Roberts University (ORU) system. At the top is the ORU logo and navigation tabs for Personal Information, Alumni Services, Student Services & Financial Aid, Employee Services, and Finance. Below the tabs is a search bar with a 'Go' button. The main heading is 'Approve Documents'. Underneath is a section titled 'Enter Approval Parameters' containing a 'User ID' field with the value 'MPCPIN', a 'Document Number' field, and two radio buttons. The first radio button is selected and labeled 'Documents for which you are the next approver'. The second radio button is labeled 'All documents which you may approve'. A 'Submit Query' button is located at the bottom of the form.

ORU Oral Roberts University

Personal Information Alumni Services Student Services & Financial Aid Employee Services Finance

Search Go

Approve Documents

Enter Approval Parameters

User ID

Document Number:

☒ Documents for which you are the next approver

☐ All documents which you may approve

Review Document

- ❖ Under Document header, select Document Number you wish to review

ORU Oral Roberts University

Personal Information Alumni Services Student Services & Financial Aid Employee Services Finance

Search Go

Approve Documents

Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document enabled, to disapprove the document.

Queried Parameters

User ID MPEPIN Mark Pepin


Document Number:

Documents Shown: Next Approver

Approve Documents List

Next Approver	Type	NSF Change	Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
Y	REQ				FIMSUSR	9.70	DOC	R0000082	History	Approve	Disapprove
Y	REQ				MPEPIN	12.00	DOC	R0000086	History	Approve	Disapprove

Review Document

Requisition Header															
Requisition	Order Date	Trans Date	Delivery Date	Print Date	Total										
R0000086	Feb 13, 2012	Feb 13, 2012	Feb 14, 2012		12.00										
Urgin:	BANNER														
Complete:	Y	Approved:	N	Type:	Procurement										
Cancel Reason:															
Requestor:	Mark Pepin		30000	Date:											
Phone Number:	918-495-7236														
E-mail:	mpepin@oru.edu														
Accounting:	Document Level														
Ship to:	Oral Roberts University														
	Attn: ORU Receiving Department														
	7777 S Lewis Ave														
	Tulsa, OK 74171 UNITED STATES OF AMERICA														
Attention:	Carter Cullum														
Contact:	Carter Cullum														
Phone Number:	918-495- X 6785														
Vendor:															
Phone Number:															
Fax Number:															
Requisition Commodities															
Item	Commodity Description	U/M	Qty	Unit Price	Ext Amount										
						Cost									
1 720	Operating Office Supplies EA		1	12	12.00										
			0.00	0.00	0.00	12.00									
Total:					12.00										
Requisition Accounting															
Seq#	COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF	Susp	NSFOvr	Susp	Amount
1	1	12	C58	110000	36000	71050	G0				N	N	N		12.00
Total of displayed sequences:															12.00
 No Related Documents Available															

See Approval History & Queue

- ❖ Under History header, select Document Number you wish to see approval history and queue

ORU Oral Roberts University

Personal Information Alumni Services Student Services & Financial Aid Employee Services Finance

Search Go

Approve Documents

Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document enabled, to disapprove the document.

Queried Parameters
User ID MPEPIN Mark Pepin
Document Number:
Documents Shown: Next Approver

Approve Documents List

Next Approver	Type	NSF Change	Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
Y	REQ				FIMSUSR	9.70	DOC	R0000082	History	Approve	Disapprove
Y	REQ				MPEPIN	12.00	DOC	R0000086	History	Approve	Disapprove

Another Query

See Approval History & Queue

 Oral Roberts University

Personal Information Alumni Services Student Services & Financial Aid Employee Services Finance

Search

View Document

Document Identification
Document Number R0000086 Type Requisition
Originator: MPEPIN Mark Pepin

Approvals required

Queue	Description	Level	Approvers
CNTR	CONTROLLER'S REQ QUEUE	30	Anne Elfrink SGHE Consultant Mark Pepin
CTRL	CONTROLLER	30	Anne Elfrink Mark Pepin

 No approvals have been recorded for this document

Approve/Disapprove Document

- ❖ Under Approve or Disapprove header, select Document Number you wish to Approve/Disapprove

ORU Oral Roberts University

Personal Information Alumni Services Student Services & Financial Aid Employee Services **Finance**

Search

Approve Documents

Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document enabled, to disapprove the document.

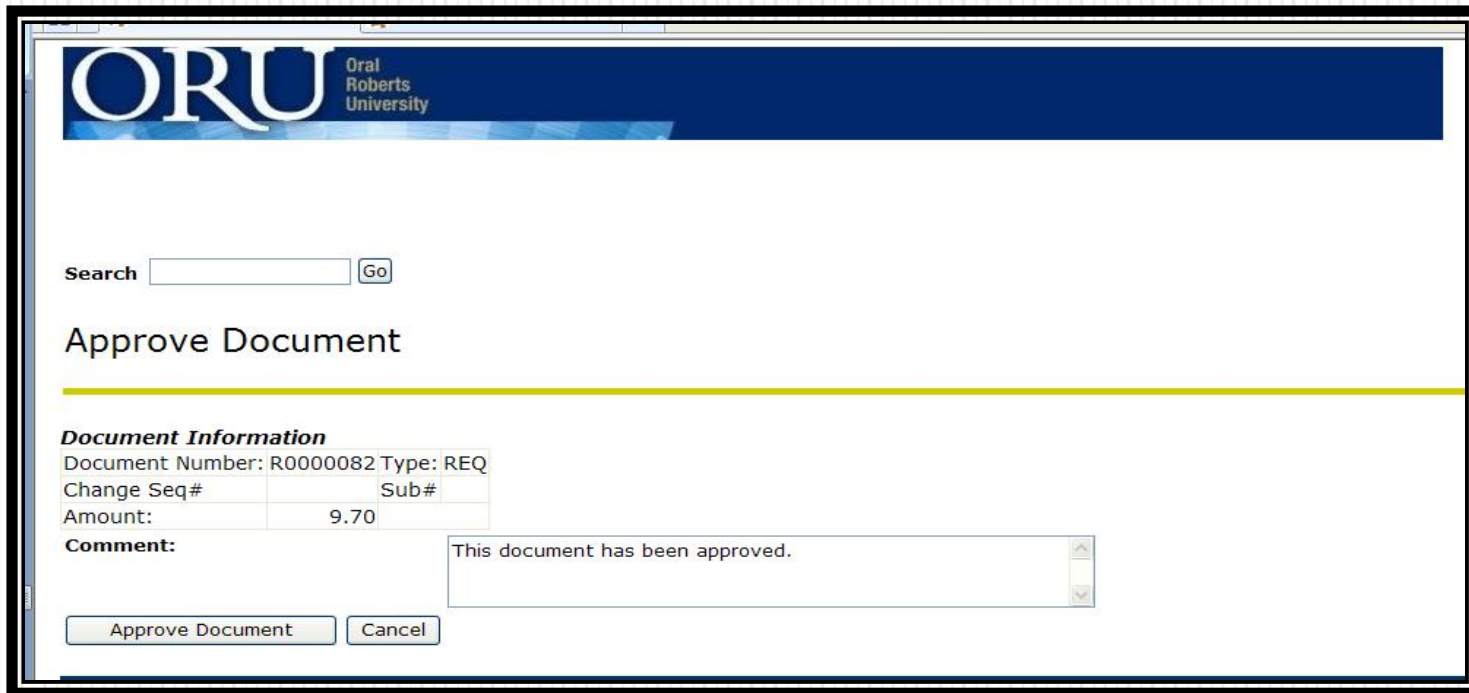
Queried Parameters
User ID MPEPIN Mark Pepin
Document Number:
Documents Shown: Next Approver

Approve Documents List

Next Approver	Type	NSF Change	Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
Y	REQ				FIMSUSR	9.70	DOC	R0000082	History	Approve	Disapprove
Y	REQ				MPEPIN	12.00	DOC	R0000086	History	Approve	Disapprove

Approve/Disapprove Document

- ❖ Add text to support your decision...Then Approve/Disapprove document.



The screenshot shows a web browser window with the Oral Roberts University (ORU) logo in the top left corner. Below the logo is a search bar with a "Go" button. The main heading is "Approve Document". Underneath, there is a section titled "Document Information" containing a table with the following data:

Document Number:	R0000082	Type:	REQ
Change Seq#		Sub#	
Amount:	9.70		

Below the table is a "Comment:" label followed by a text area containing the text "This document has been approved." At the bottom of the form are two buttons: "Approve Document" and "Cancel".