Signing into Banner Finance

1. **Log into the MyNEU Portal**

    http://myneu.neu.edu/

secure access login

myNEU Username:	[ ]
myNEU Password:	[ ]

🔒 (Login) (Cancel)

You will then be at the portal at the main page:

2. **Click on the Services & Link tab (not the Finance Tab – we'll get to that later ☺)**

Welcome Jeffrey Wormuth
You are currently logged in.

| myNEU Communications | Services & Links | Finance | Library |

Announcements   🔲🔳❎

Within the Faculty/staff channel, you have options for Banner INB, SSB & e~Print.

Most people will have SSB access, but not INB access.

E~Print access will be available, but there are no transactional reports available yet

3. ***Click on either SSB or INB***

Faculty / Staff Services   🔲🔳❎
hrConnect
Internet Native Banner (INB)
Self-Service Banner (SSB)
Banner e~Print Reports

A second window will open with the Banner Finance application running. At this point you will recognize where you are from your training and documentation.

Now for the fun new stuff – Portal Channels

Click on the Finance tab to get to the Banner Finance channels.

Approval Alerts

 The channel on the left hand side of the page is called Approval Alerts (see above)

If you have documents awaiting your approval, it will look like this:

This is a very good tool to use if you do not want to log into SSB in order see if you have documents awaiting your approval.

If you click on the Next Approver or All Documents link you will be brought directly into SSB to the list of documents awaiting your approval.

You should recognize this screen and know what to do from here based on your training.

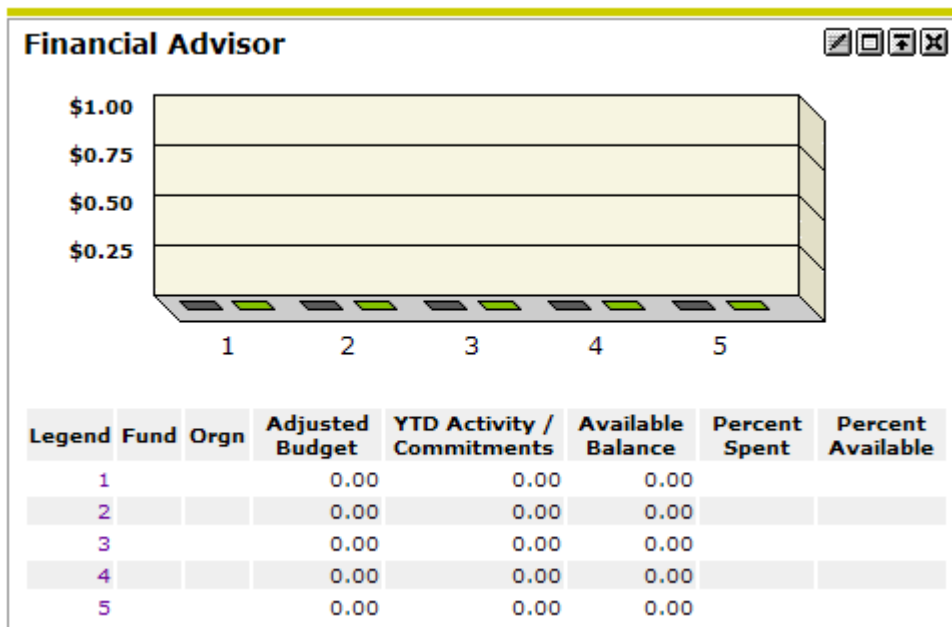| Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
N000135381	1.00	DOC	R0000053	History	Approve	Disapprove
KECHES	121.00	DOC	R0000130	History	Approve	Disapprove
N000145116	55.00	DOC	R0000255	History	Approve	Disapprove
SSBTRAIN04	55.00	DOC	R0000257	History	Approve	Disapprove
N000121098	55.00	DOC	R0000258	History	Approve	Disapprove
N000144518	55.00	DOC	R0000259	History	Approve	Disapprove
N000144459	55.00	DOC	R0000260	History	Approve	Disapprove
SSBTRAIN06	55.00	DOC	R0000261	History	Approve	Disapprove
N000128196	55.00	DOC	R0000262	History	Approve	Disapprove

Financial Advisor Channel

Financial Advisor Channel:

Purposes:

> ➢ Allows end users to add selected quick budget queries to their portal page.
> ➢ Allows for a direct link to the budget queries that the end user has defined

The channel starts blank & is customizable by individual user.

Financial Advisor

Legend	Fund	Orgn	Adjusted Budget	YTD Activity / Commitments	Available Balance	Percent Spent	Percent Available
1			0.00	0.00	0.00		
2			0.00	0.00	0.00		
3			0.00	0.00	0.00		
4			0.00	0.00	0.00		
5			0.00	0.00	0.00		

To customize this channel, click the edit icon at the top right corner of the channel:

Edit

You now see this:

Financial Advisor   ☑☐⊼☒

Preferences

Adjusted Budget Color: Green ▼

YTD Activity / Commitments Color: Green ▼

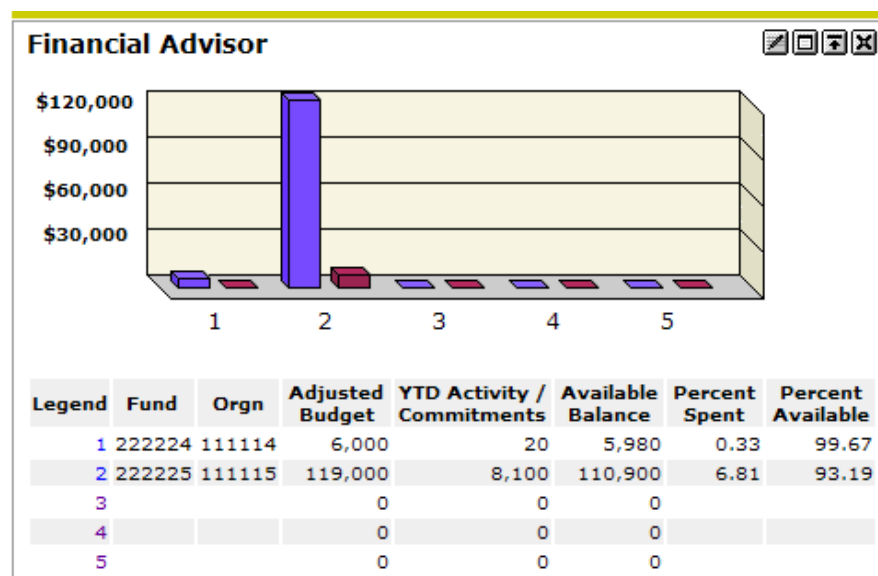| Set	COA	Fund	Orgn
1			
2			
3			
4			
5			

◁Back   ♺Reset   🖫Apply

- Notes
    - You cannot use index here, you must use Fund & Org
    - You are limited to 5 FOAPs for this channel

Steps

1. COA is always N
2. Type in the Fund/Org combos you want to use
3. Change the colors to purple (OK, so purple isn't required, just highly recommended)
4. Click the Apply icon
5. Click the Back icon

You now see something like this:

Financial Advisor   ☑☐⊼☒

Legend	Fund	Orgn	Adjusted Budget	YTD Activity / Commitments	Available Balance	Percent Spent	Percent Available
1	222224	111114	6,000	20	5,980	0.33	99.67
2	222225	111115	119,000	8,100	110,900	6.81	93.19
3			0	0	0		
4			0	0	0		
5			0	0	0		

Quick query like data right on the portal!!! As an added bonus, purple bars!!!!!!!!

As if that weren't enough, here is 1 more. Click on the #1 under the legend column & it brings you right to a budget query within SSB with the FO that matches the row on your portal channel.