ODU   Frequently Asked Questions (FAQ) Sheet Finance Self-Service (SSB)

> ### General Information:
> **Purpose:** This FAQ sheet provides quick answers to common questions concerning Banner Finance Self-Service functionality and application. Contact bannerhotline@odu.edu if you have additional questions.

Access & Security

How do I get access to Finance Self-Service (SSB) and Banner Document Management (BDM)?

- Users with existing Banner Finance security will be set up to automatically access **My Finance Query** and **My Journals**.
- New users must submit a Midas request. ➡ **MIDAS Account Request Guide**
  - *View How-to Video* ***HERE***!
- Access may be granted at a higher organizational level (such as division), when appropriate. See the reference guide to Finance Self Service ➡ **How to Log Into SSB**
- Direct access related questions to bannerhotline@odu.edu

How can I tell if I have Banner Document Management access?

- Log into **Banner Finance Self-Service**, if you see the View Documents icon, you have access to BDM.
- If the icon is missing, request access through MIDAS. ➡ **Midas Request Process**

Index Codes

What are Index Codes?
Index Codes simplify data entry by combining multiple Chart of Accounts (COA).

Index Code	Fund	Organization	Program	Description
1CL00	01100	1CL00	162	FINANCE OFFICE

See the reference guide to Index Codes ➡ **Index Codes in Banner**

Do I have to use the Index Code field?
We encourage you to use **Index Codes** to populate the Fund, Organization Code, and Program Code. You may, however, still enter the organization code in the Org Code field.

My Finance Query

Where can I find more information about the various query options and parameters?
To find additional information on the various query options and the query parameters see the Finance Self-Service Training Guide and the **Finance Self Service - Training Guide** and **Banner SSB vs. Admin Pages** handouts.

Is the data live in My Finance Self-Service?
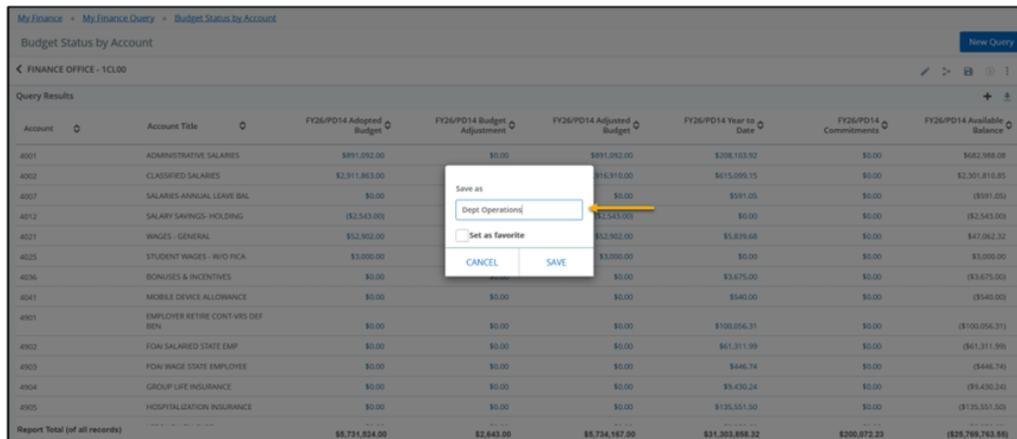Yes. The data is live and updated in real time.

Can I save My Finance Queries?

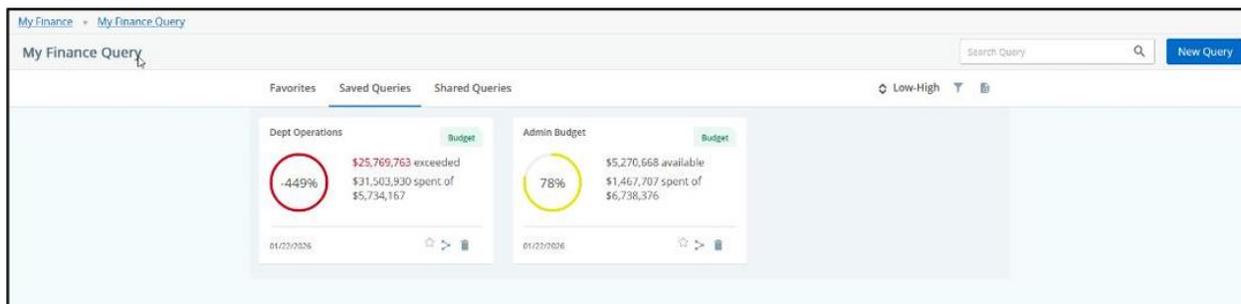Yes, you can save your My Finance Queries to access in the future.

To Save a Query

1. Select the **Save icon** from the Query Title Bar.
2. Enter a **Query Name** in the *Save As* field.

Saved queries also create thumbnails on your dashboard.

What is a Fiscal Period and Budget Period, and which period should be used?

- A fiscal period is a specific time within a fiscal year used to track and report financial activity. Budget period acts in the same way as fiscal period. The first month of the fiscal year (July) is **Fiscal Period 01**.
- **Fiscal Period 14** includes all periods of the fiscal year. **My Finance Queries** should use Fiscal Period 14 to ensure the query results include all data.
- **My Journals must** use Fiscal Period 01.

My Journals (Budget Adjustments)

Who can submit budget adjustments?

Budget Unit Directors (BUDS) and BUD Delegates have access to submit **My Journals**.

Do Budget Unit Directors (BUDs) need training?

Training is **strongly encouraged** by all users involved in the budget process. ➡ **Finance Self Service - Training Guide**
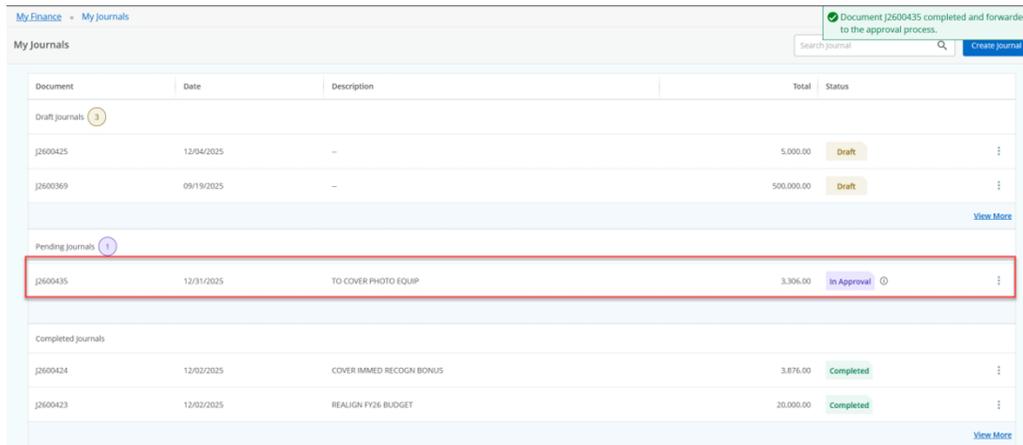
Do Self-Service budget adjustments replace the Excel form for payroll changes?
No. Payroll-related adjustments (4000 account codes) must continue to use the existing **Excel form. See link here** ➡️ **budget-adjustment-request-form.xlsx**

- The form must be submitted with **Position Actions.**
- The form must be sent to the **Budget Office** for processing.

Can I see the status of a budget adjustment I have submitted?
Yes. From Banner Finance Self-Service you can see all your **My Journals** in 3 categories: **Draft, Pending (Approval),** and **Completed Journals**.


When a journal is still in a draft status, can it be edited if something was entered incorrectly?
Yes. If the draft needs to be edited, click on the line you want to edit, and it brings the box back to be edited.

What is the Distribution Total?
- This is the total of all budget increases and decreases.
- The total may be calculated by adding the absolute values of all increases and decreases.
- **Reminder: NSF Checking** should remain checked.
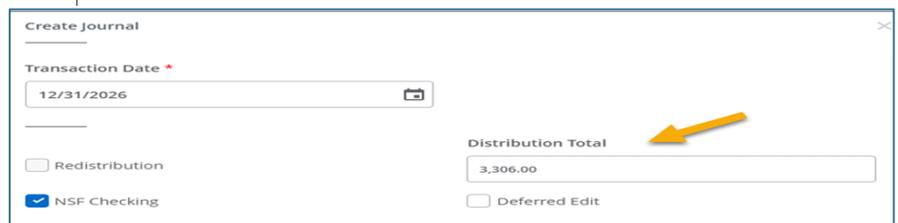
Approvals & Workflow

How do approvals work for My Journal budget adjustments?
- Each area has at least one Level 3 approver, and a backup.
- Budget adjustments are reviewed and approved in Banner Finance Self-Service (SSB).
- Only users with the proper budget access can view or approve budget adjustments.

I am an approver; can I also enter My Journals?
- Yes, for organizations that you have access to.
- If an approver enters **My Journal**, the journal will also show in their approval queue.
- Preparers should never approve their own journal entries; doing so will result in the entry being rejected.

Quick Tips

- ✓ Use index codes whenever possible to save time and avoid errors.
- ✓ Submit Midas requests early to prevent access delays. ➡ **MIDAS Account Request Guide**
- ✓ Double-check distribution totals before submitting journal entries.
- ✓ Review training resources for accuracy.

Links and Contacts
Website: **https://www.odu.edu/finance/training**
SSB User Guide:
https://www.odu.edu/sites/default/files/2026/documents/ssb-budget-training-guide.pdf
Email: BannerHotline@odu.edu