Banner Finance Self Service vs. Banner Finance Administrative Pages

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General Information:

Banner Finance Self-Service (SSB) is a NEW tool designed for quick, user-friendly access to financial data, while Banner Finance Administrative Pages provide comprehensive tools for finance professionals. Both systems display real-time data. This guide explains:

- Key differences between SSB and Admin Pages
- When to use each system
- Tips for efficiency

Please Note:

Access to Banner Finance Self-Service (SSB) is based on your existing permissions in Banner Administrative Pages for assigned Organization Codes and Access Classes. Users can only view details for Organization Codes they have been granted access to.
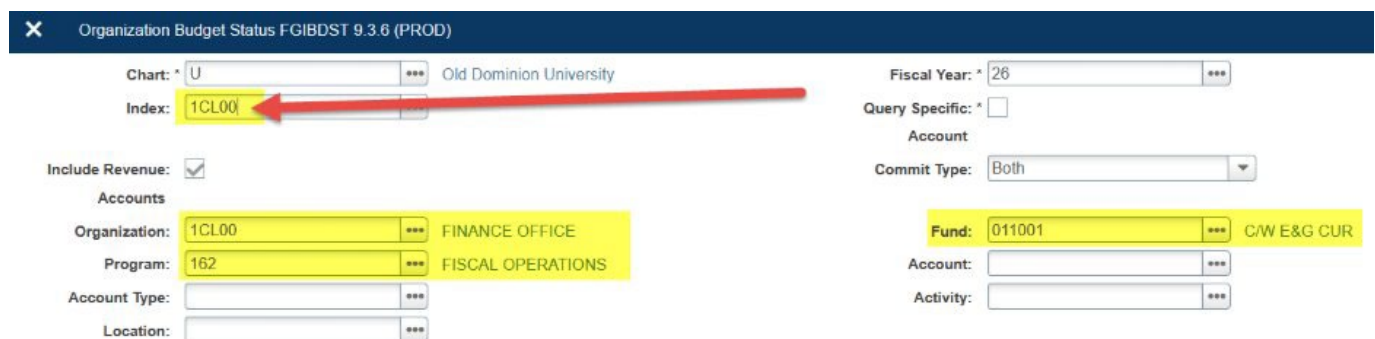

Comparison of Features:

Features	Banner Finance SSB	Banner Finance Admin Pages
Navigation	Menu-driven, icons, search bar	Form-based, requires 7-letter form name
Access	LeoOnline > Finance Self-Service portal with MIDAS login (leoonline.odu.edu)	Direct Banner Admin login (banner.odu.edu)
Search	Flexible keyword search	Caps Lock required; strict criteria
User Interface	Modern, web-based	Classic Banner forms
* See our *Banner Finance Self Service Training Guide: Using Index Codes in Banner Handout* for guidance on Index Codes.		

What is an Index Code?

An ***Index Code*** in Banner is a short, predefined identifier that automatically populates the ***Fund***, ***Organization***, and ***Program*** codes when entered on a transaction screen.

It helps users:

- Reduce data entry time
- Minimize coding errors
- Ensure consistent posting across financial transactions

Banner Finance SSB Functionality and User Options:

Self-Service Banner provides an intuitive interface for accessing real-time financial information without needing to know technical Banner form names and complicated navigation. Current features include:
- **Finance Queries**
- **View Documents**
- **Journal Vouchers**

My Finance Query
Create, view and share budget availability, encumbrance and payroll queries.

My Journals
Create and view draft, pending and completed journals and supporting documentation.

Delete Finance Template
Delete templates for Finance Queries, Budget Development, and Purchase Orders.

View Document
View draft, pending and completed documents with related information and approval history.

My Finance Query:

Overview:

My Finance Query allows users to:
- Retrieve budget data (similar to ***FGIBAVL*** or ***FGIBDST***)
- View related transactions (similar to ***FGITRND***)
- Create and share queries
- Perform comparison queries
- Download results to Excel

My Finance Query
Create, view and share budget availability, encumbrance and payroll queries.

NOTE: *For more information on Banner Finance Administrative Pages, visit our* Banner Finance Training Page.

View Documents:

Overview:

Finance View Document in SSB enables users to search and view scanned financial documents (e.g., invoices, journal vouchers) from ***Banner Document Management (BDM)*** without logging into Admin Pages. *NOTE: Users must have BDM Invoice View Access in Banner Administrative Pages to view documents in SSB!*
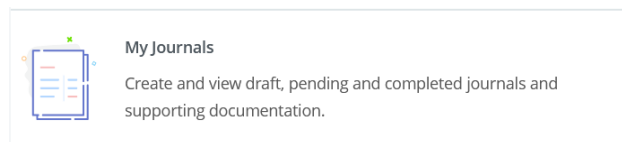
View Document
View draft, pending and completed documents with related information and approval history.

My Journals:

Overview:

My Journals allows users to create and submit electronic journal vouchers or budget transfers directly in Banner Finance Self-Service. It provides a streamlined interface for accounting adjustments. Entries follow predefined approval workflows based on fund and organization access, ensuring compliance. Users must have appropriate Banner Finance access to initiate or approve journals.
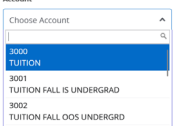

Example of when to Submit/Use My Journals in SSB:

- Transferring budget funds between departments or accounts to cover anticipated expenses.

Please Note:

Users who enter *My Journal* entries in Banner Finance Self-Service (SSB) cannot approve those same transactions. While some users may have permissions to both enter and approve different journal entries, all submissions follow an automatically routed approval workflow to ensure compliance.

SSB vs. Administrative Pages – Navigation Tools:

Function	Icon in SSB	My Finance Query Tool	Administrative Pages Tool	Brief Description
Budget/Finance Reports		*My Finance Query*	Banner Home screen Search Block & 7-letter Form Names	Navigate to Finance Reports and interpret budget data, available balance, encumbered funds, etc.
Execute New Search	New Query	*New Query*	Search Block & 7-Letter Form Names	Search for your budget details with various customizable search criteria available in the SSB system
Search your Organization Code Budget Details	Index	*Index Code* *Required Field!*	*Index Code, or Fund, Org Code, and Program*	View your budget details for your assigned Organization Code(s)
Account Code Search	Account Choose Account 3000 TUITION 3001 TUITION FALL IS UNDERGRAD 3002 TUITION FALL OOS UNDERGRD	Account Code	*Account*	You may narrow your search to only view a particular pool or line-item account code in this dropdown field
Viewing Relevant Revenue Account Codes	Include Revenue Accounts	*Include Revenue Accounts* Checkbox	Available in *FGIBDST* and related forms	Opt to view revenue accounts that apply to your assigned Organization Code(s)
Fiscal Year/Fiscal Period	Fiscal Year* 2025 Fiscal Period* 14 Comparison Fiscal Year None Comparison Fiscal Period None	*Fiscal Year* and *Fiscal Period* dropdowns *Required Fields!*	Fiscal Year only	Defaults to **current Fiscal Year** in both systems. Defaults to **Fiscal Period 14** to show the entire year's data in both systems. *NOTE: In SSB, you may select specific Fiscal Period in this section to view only one month's worth of data.*
Budgeted funds rolled in at beginning of FY	Adopted Budget ⓘ	*Adopted Budget* checkbox	*FGIBUDG*	View original budget allocated at beginning of Fiscal Year – includes the original base budget (BD01)
Year to Date Activity	Year to Date ⓘ	*Year to Date* checkbox	*YTD Activity* column in FGIBDST, FGIBAVL, etc.	Actual revenue or expenditure activity for the year to date
Budget Adjustments	✓ Budget Adjustment ⓘ	*Budget Adjustment* checkbox	*BD02/BD04 Transaction Types* in various forms (FGITRND, FGIDOCR)	Additions or Reductions made to the Budget since the Original allocation (Permanent & Temporary Adjustments)

Function	Icon in SSB	My Finance Query Tool	Administrative Pages Tool	Brief Description
Available Balance	☑ Adjusted Budget ⓘ	*Adjusted Budget* checkbox	*Adjusted Budget* column in *FGIBAVL, FGIBDST*	Total current budget (Adopted Budget +/- Budget Adjustments)
Moneys for one-time (*Temporary*) Budget Adjustments	☐ Temporary Budget ⓘ	*Temporary Budget* checkbox	FGITRND, FGIDOCR	Adjustments to the current year budget that are temporary in nature – shows BD04 and XB4 transaction tipes as seen in FGITRND and FGIDOCR.
Reviewing Open Encumbrances	☐ Encumbrance ⓘ	*Encumbrance* checkbox	*FGIOENC*	Budgeted funds committed for future expenditures by Pos, Salary Encumbrances, etc.
Reviewing money committed to expenditures	☐ Commitments ⓘ	*Commitments* checkbox	*Commitments* column in *FGIBAVL, FGIBDST*, etc.	Total budget set aside for future obligations (*Reservations + Encumbrances*)
Actual Budgeted Monies Available	☐ Available Balance ⓘ	*Available Balance* checkbox	*Available Balance* column in *FGIBAVL, FGIBDST*, etc.	Remaining budget (Adjusted Budget – Year to Date – Commitments)
Execute Search	SUBMIT	*Submit*	*Go*	Execute your customized search to review relevant data based on user search criteria.
BDM View	View Document. View draft, pending and completed documents with related information and approval history.	*View Documents*	*Retrieve Button* on various forms (*FAIINVE, FOIDOCH, etc.)*	To view scanned invoices, Journal Entries, etc.

Links and Contacts:
Website: Finance Training Page >
Banner Finance Self Service dropdown
Email: BannerHotline@odu.edu
Banner Finance SSB Portal: leoonline.odu.edu