



Banner Finance Self-Service

Manage your available balances more efficiently while gaining new insights into your spend data



“It’s very user-friendly. I don’t think it will be difficult for anybody to use it.”

USER, Usability Testing

Managing departmental budgets is critical work, but without the right tools it can be unnecessarily cumbersome. Outdated interfaces can make a user’s job even harder—especially for employees whose primary roles aren’t finance-oriented.

Users at all levels need easy access to their information. That’s why we designed Banner Finance Self-Service Release 9.1 with brand-new tools for viewing, filtering, and sharing data. It’s an intuitive solution that lets all users access their most essential projects and manage budgets, balances, and spending with maximum efficiency.

Work faster and smarter with a comprehensive set of applications

With powerful reporting tools and a new graphic dashboard, Banner Finance Self-Service Release 9.1 is optimized for efficiency. It offers a smooth user experience that lets you view available balances for easier financial management. It provides up-to-the-minute financial reporting to help you make better decisions, faster. And it pushes content directly to you so you can take prompt action.

This consolidated, mobile-ready application bundles several key functionalities:

- **My Finance Query**—a streamlined and completely redesigned application that presents your query results in an easy-to-read format, with configurable health indicators on each line item

- **My Finance**—an all-new dashboard that offers a clear view of your most-used applications
- **My Requisitions**—an intuitive, responsive application for efficient requisition management (previously released as Purchase Requisition)

Introducing the all-new My Finance Query

Combing through long lists of files and query results wastes valuable time. My Finance Query (which replaces Budget Query, Encumbrance Query, and View Document from Banner Finance Self-Service 8.x) streamlines your efforts with a modern, mobile interface and attractive dashboard display of favorite queries, shared queries, and document-search results.

My Finance Query makes it easy and intuitive to:

- Create new queries for budget, encumbrance, and payroll
- Configure views of preferred funding elements
- Include or exclude revenue data
- See quick views of spend analysis
- View fiscal-year and multi-year activity
- Compare financial data across user-defined timeframes
- Configure visual indicators to understand when budgets and line items are nearing or exceeding planned spend

- Leverage the existing Banner database for historical trend analysis and better decision-making
- Drill down from summary to document-level detail, including PDF views for saving and sharing

Streamline the purchase requisition process

Requesting goods and services is faster and easier than ever with My Requisitions. No more manual paper processes, and no need to be at a desktop computer: This mobile application lets casual and power users alike create and copy requisitions, revisit drafts, and monitor the status of pending requisitions. A single, user-friendly dashboard displays all the information you need. And step-by-step prompts walk you through the process to completion, so you get your work done faster.

Customize your dashboards for quick access to favorites

Like My Finance Query, the all-new My Finance dashboard features clean, appealing graphics and logical navigation. No more text-heavy links to look through—just the applications you need and use the most. And it's configurable, so administrators can set role-based security levels for each application.

Take the long view

Better functionality results in a better user experience. With the Ellucian Extensible Ecosystem strategy as the foundation for evolution, we design solutions for a global audience that can adapt to future changes as rapidly as your needs change. They are ready for the cloud, can scale up or down as your needs change, and are flexible enough to meet your specific requirements. Built on these key principles, Banner Finance Self-Service 9.1 is the configurable, modern solution you need.



“It’s a beautiful application... Looks wonderful.”
USER, Development Partner Group



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