What Is Banner?

- Unified Digital Campus (UDC)
  - SSB = Self-Service Banner
    - Web based front end –much easier navigation
    - Functionality limited to Requisitions, Purchase Orders, Budget transfers, Queries, Approvals
  - INB = Internet Native Banner
    - More of a text based front end –more difficult navigation
    - Includes all functionality in Banner
How Do I Get Access?

My Information
Your NUID is 000442087.

HRM Benefits and Services
Employee Self-Service
Enables you to update all personal information, including emergency contact information, and to view pay statements issued after January 1, 2012.

Internet Native Banner (INB)
Human Resources - Benefits
Fidelity
TIAA-CREF
Commuter Benefit
Enables you to enroll online for any public transportation commuter/transit pass in the nation and to be reimbursed for qualified parking expenses; the cost will automatically be deducted from your paycheck using pre-tax earnings in accordance with IRS and state tax regulations.

Faculty / Staff Services
Conflict of Interest Form
Internet Native Banner (INB)
Self-Service Banner (SSB)
Banner Finance Help Web Page
Banner e-Print Reports
How Do I Get Access?

Welcome to the Banner Finance

This site is your online resource for the Banner Finance system. The links at the left contain various tools that should help you find the answers to your Banner Finance questions.

The FOAP and Account codes sections contain online lookup tools that allow you to search for Index, Fund, Org, Account and Program codes.

The training section has a link to online registration for training classes along with the documentation used in the training classes.

The forms section contains links to all of the forms needed for Banner Finance.

The general info section contains online versions of all general Banner Finance system documentation.

If you cannot find the answer to your question using the documentation on this page, please contact the Help desk.

(617) 373-4357
help@neu.edu

Any questions? Please contact the Help Desk at (617) 373-4357 or help@neu.edu.
How Do I Get Access?

Links, Forms and Lists

Links
- MYNEU
- Hybrid Web Page
- Banner Finance Help Web Page
- Accounts Payable
- Office of Research Administration and Finance
- Human Resources Management
- Procurement Services
- Registrar's Office
- FRS E-Print Login Page

Forms
- Banner Finance Access Request
- Banner Finance Access Request Instructions
- Banner Finance New Organization Request (ledger 1 and 2)
- Designated Fund Outside Funding
- Department Deposit Form
- IM1 Detailed Budget Access Form

Lists
- Account code attributes-Summary
- Account code attributes-Detail
- Earnings Code Cheat Sheet - To be used in completing HRM Paperwork
- FY14 Fringe Benefit Rates
- Banner Finance Rule Codes
How do I Get Access?

www.northeastern.edu/research/raf/
Welcome to the Banner Finance

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help@neu.edu
Using the Help Page to find awards

FOAPs Search

Search by Index Description

Enter all or part of your index description in the field below to locate your Index, index description, fund, organization, program, and grant codes.

Index Description: Muke...  

Search Results

<table>
<thead>
<tr>
<th>Index</th>
<th>Index Description (Title)</th>
<th>Fund Code</th>
<th>Organization Code</th>
<th>Program Code</th>
<th>Grant Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>30509</td>
<td>OH Return Mukerjee, Sanjeev</td>
<td>320005</td>
<td>131300</td>
<td>2010</td>
<td>320005</td>
</tr>
<tr>
<td>305019</td>
<td>Mukerjee Nucet FFS</td>
<td>305019</td>
<td>131300</td>
<td>9540</td>
<td>305019</td>
</tr>
<tr>
<td>501781</td>
<td>ADVANCE/HRD-0811170std/Mukerjee, S.</td>
<td>501781</td>
<td>131300</td>
<td>2010</td>
<td>G00003037</td>
</tr>
<tr>
<td>503013</td>
<td>DEN-PT/Univ of North Florida/Muker</td>
<td>503013</td>
<td>131300</td>
<td>2010</td>
<td>G00003390</td>
</tr>
<tr>
<td>503016</td>
<td>DEN/DE-EE0000459/Mukerjee, S.</td>
<td>503016</td>
<td>131300</td>
<td>2010</td>
<td>G00003468</td>
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<tr>
<td>504018</td>
<td>ARMY/W911NF-09-1-0227/Mukerjee, S.</td>
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<td>131300</td>
<td>2010</td>
<td>G00003158</td>
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<tr>
<td>504022</td>
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<td>504022</td>
<td>131300</td>
<td>2010</td>
<td>G00003428</td>
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<tr>
<td>505669</td>
<td>STATE/UMASS-MTTCC/Mukerjee, S.</td>
<td>505669</td>
<td>131300</td>
<td>2010</td>
<td>G00004052</td>
</tr>
<tr>
<td>506946</td>
<td>CORP/Cabot Corp/Mukerjee, S.</td>
<td>506946</td>
<td>131300</td>
<td>2010</td>
<td>G00003405</td>
</tr>
<tr>
<td>506979</td>
<td>DEN-PT/Proton Energy Sys/Mukerjee</td>
<td>506979</td>
<td>131300</td>
<td>2010</td>
<td>G00003608</td>
</tr>
<tr>
<td>507079</td>
<td>CORP/Ford Motor Co/Mukerjee, S.</td>
<td>507079</td>
<td>131300</td>
<td>2010</td>
<td>G00004137</td>
</tr>
</tbody>
</table>
How do I find my Grant Code?
Where can I get a list of my grants in Banner?
Go to the Banner Finance Help Web Page
https://prod-web.neu.edu/webapp6/Banner/Finance/secure/index.jsp
A simple query via the Banner Finance Help Page accessed via MyNEU - Services & Links can provide you with this list.

<table>
<thead>
<tr>
<th>IndexDescription</th>
<th>Fund Code</th>
<th>Organization Code</th>
<th>Program Code</th>
<th>Grant Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>IndexDescription</td>
<td>Fund Code</td>
<td>Organization Code</td>
<td>Program Code</td>
<td>Grant Code</td>
</tr>
<tr>
<td>IndexDescription</td>
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<td>Organization Code</td>
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<td>Grant Code</td>
</tr>
<tr>
<td>IndexDescription</td>
<td>Fund Code</td>
<td>Organization Code</td>
<td>Program Code</td>
<td>Grant Code</td>
</tr>
<tr>
<td>IndexDescription</td>
<td>Fund Code</td>
<td>Organization Code</td>
<td>Program Code</td>
<td>Grant Code</td>
</tr>
</tbody>
</table>

Search Results

How do I know the project end date?
- **FZRB090** e~Print report contains project end date
  - (grant version of the FZR0090)
That tells you when the 90 day clock starts ticking

Fund terminated? Why?
- Your 90 day closeout period is over, the termination date is current
  - Banner will not allow you to create a Req
  - Banner will not allow A/P to process an invoice
- Feeds will still go through
- OK, now what?
  - If charge is legitimate for the grant & there are funds, contact Research Finance

Overspent Grants?
Did you obtain additional funding?
If so, did you submit a request to ORAF?
Please note that the Grant Information used in this example contains descriptive and expenditure data from multiple awards.

Always use this report when viewing grants.

Tells you the Current Period is January 2014.

Budget End Date: 30-JUN-2014
Project Start Date: 15-JUL-2012
Project End Date: 30-JUN-2015

Available Balance = Adjusted Budget - Inception to Date Activity - any Commitments

From Start of Award thru Current Month

Salary & Fringe Encumbrance

Entire Budget is pooled, ok to have line item with a negative number.

<table>
<thead>
<tr>
<th>Account Code</th>
<th>Account Code Title</th>
<th>Adopted Budget</th>
<th>Adjusted Budget</th>
<th>Current Period</th>
<th>Inception To Date Activity</th>
<th>Commitments</th>
<th>Available Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>61080</td>
<td>Salary-Teaching Assistant</td>
<td>182,000.00</td>
<td>182,000.00</td>
<td>6,300.00</td>
<td>31,100.00</td>
<td>18,900.00</td>
<td>131,600.00</td>
</tr>
<tr>
<td>61130</td>
<td>Salary-Professional</td>
<td>123,175.00</td>
<td>123,175.00</td>
<td>7,500.00</td>
<td>37,500.00</td>
<td>32,840.90</td>
<td>32,840.90</td>
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<tr>
<td>Account Type: 61 Labor</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>62110</td>
<td>Fringe Benefits</td>
<td>46,441.00</td>
<td>46,441.00</td>
<td>2,461.96</td>
<td>12,109.80</td>
<td>15,395.85</td>
<td>18,735.35</td>
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<tr>
<td>Account Type: 64 Benefits</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>73021</td>
<td>Travel-Airfare</td>
<td>1,013.20</td>
<td>-1,013.20</td>
<td>-</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>73022</td>
<td>Travel-Train</td>
<td>51.50</td>
<td>51.50</td>
<td>-51.50</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>73027</td>
<td>Travel-Lodging</td>
<td>663.75</td>
<td>-663.75</td>
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<tr>
<td>73028</td>
<td>Travel-Meals</td>
<td>145.99</td>
<td>-145.99</td>
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<tr>
<td>73030</td>
<td>Travel-Miscellaneous</td>
<td>45.00</td>
<td>-45.00</td>
<td>-</td>
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<td></td>
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<tr>
<td>73501</td>
<td>Subscriptions</td>
<td>372.70</td>
<td>372.70</td>
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<tr>
<td>73304</td>
<td>Laboratory Supplies</td>
<td>3,925.00</td>
<td>3,925.00</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>73405</td>
<td>Printing-Reprographics</td>
<td>34,415.00</td>
<td>34,415.00</td>
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<tr>
<td>73410</td>
<td>Conference/Seminar Registration</td>
<td>250.00</td>
<td>250.00</td>
<td>-</td>
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<tr>
<td>73420</td>
<td>Consultants</td>
<td>3,000.00</td>
<td>3,000.00</td>
<td>-</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Account Type: 76 Discretionary Spending P</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>79995</td>
<td>Indirect Costs</td>
<td>198,991.00</td>
<td>198,991.00</td>
<td>9,418.67</td>
<td>47,105.90</td>
<td>151,785.10</td>
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<tr>
<td>Account Type: 78 Indirect Costs</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total FOR ORGN CODE: 121350 Sociology</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>318,133.20</td>
</tr>
</tbody>
</table>

Northeastern University proprietary and confidential
Financial Data Improvements

- Salary Commitment Reporting on Budget Statements
  - Implemented July 1, 2013

- Daily Posting of Indirect Cost Allocations
  - Provides faculty and administrators “real time” information – Implemented October 30, 2013
<table>
<thead>
<tr>
<th>myMarketplace</th>
<th>ProCard</th>
<th>A Purchase Order</th>
<th>Direct Pay</th>
</tr>
</thead>
</table>
| Buying Goods From Hosted Suppliers  
  - If order is <$3,000 then it is sent to the supplier  
  - If order is $3,000 sent to Procurement for approval | All Payments Made to Vendors for Goods or Services <$3,000  
  - If the Supplier Accepts Procard  
  Use for:  
  - Conference Fees  
  - Registration Fees  
  - Subscription Fees  
  - Online Payments From Secure Sites  
  - Orders Made Over The Phone  
  - Ongoing Monthly Fees  
  - If Authorized, Travel Fees | Purchase of Goods or Services $3,000  
  - Purchase of Goods or Service < $3,000  
  - If the Supplier Will Not Accept the Procard | Only Exceptions When To Use A DPAY (v. Procard or PO) On A Limited Basis:  
  - Speaker Fees  
  - Honoraria  
  - Monetary Prize/Awards  
  - Rents  
  - Dancers  
  - Royalties  
  - Referees & Umpires  
  - Sculptors  
  - Musicians  
  - Similar Entertainers… |
| Benefits Of Using A Purchase Order  
  - Protects NU & Your Department In The Event Of A Dispute  
  - Banner Provides Department Level Of Approval  
  - Easier Invoice Tracking  
  - Prompt Payment To Suppliers  
  - Insures: Suppliers Are Qualified To Do Business With NU (W-9 On File, COI, Etc.)  
  - Compliance With NU Policies, Federal & Other Research Requirements | Performer Agreements Are Required For Performers  
  - Found on Legal Counsel Webpage |
- Easy To Use
- Single Sign On Through myNEU
- No Need To Remember Additional Passwords
- Less Requisitions, PO’s, & Paper Invoices!
- Departmental Electronic Billing
- More “Link Outs”
- New Suppliers Added Dell, Sigma, Grainger
Welcome to myMarketplace at Northeastern University!


Notice Regarding Furniture Orders: Per Boston Fire Department regulations, all upholstered furniture & molded seating must meet fire code standards. Please contact Procurement Services before placing an order for seating.

NOTE: Once you punch out from myMarketplace to one of the supplier’s pages you have 90 minutes to return to myMarketplace to complete & submit your order to the supplier. If you do not complete & submit your order within 90 minutes you will be logged out of myMarketplace and will lose your order.

Punch-Out Catalogs: Click on Supplier Icon

Office Supplies  Computer Supplies  Scientific Supplies  Scientific Supplies  Industrial Supplies  Computers  Scientific Supplies

Link-Out Catalogs: Click on Supplier Icon. These suppliers may require a separate username and password or are for information only
Welcome to myMarketplace at Northeastern University!


Training
Training sessions are provided on an ongoing basis. Please check our training schedule for upcoming sessions.

Confidential Pricing
Supplier prices within the myMarketplace system should be treated as Northeastern University confidential. These prices are not to be shared or disclosed in any way with other suppliers, third parties, or individuals outside of Northeastern University.

Notice Regarding Furniture Orders:
Per Boston Fire Department regulations, all upholstered furniture & molded seating must meet the code standards. Please contact Procurement Services before placing an order for seating.

NOTE: Once you punch out from myMarketplace to one of the supplier's pages you have 90 minutes to return to myMarketplace to complete & submit your order to the supplier. If you do not complete & submit your order within 90 minutes you will be logged out of myMarketplace and will lose your order.

To place an order:
1. Click on the supplier logo
2. Add items to your shopping cart
3. Follow the supplier checkout process
4. Click "Submit for Approval"

Link Out Supplier - Requires Additional Username and Password

Office Supplies

STAPLES
Proper Procedure Flow For Buying With a PO

Know Your Price
- Contracted Catalog Prices
- Formal RFP
- Verbal Or Written Quotes

Get Bids/Quotes
- $\geq$ $3000$ You Need 3 Bids
- Get Quotes
- Decide On The Supplier

Requisition
- Fill Out Requisition Form In Banner
- Departmental Level/Budget Administrator Approval
- If Using Grant Funds $\geq$ $1,000$, Then Also Need RAF Approval

Purchase Order
- Requisition Is Reviewed By Procurement
- Assigned PO #
- PO Is Sent To Supplier

The Order Is Placed!

Goods Are Received Or Services Are Performed

Supplier Submits Invoice
- PO # Referenced On Invoice
- Departmental Level Approval

Don’t forget to liquidate!

This Process Should Take ~24–48 Hours If All Necessary Documents Are Provided
Approvals – REQ’s & Invoices

- How to look up who needs to approve
- ORAF approvals > $1,000
# Liquidations

## Northeastern University

**Procurement Services**

### Forms

<table>
<thead>
<tr>
<th>Staff &amp; Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>myMarketplace</td>
</tr>
<tr>
<td>Services</td>
</tr>
<tr>
<td>Suppliers Guide</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Forms</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Banner</td>
</tr>
<tr>
<td>Minority Business</td>
</tr>
<tr>
<td>Green Purchasing</td>
</tr>
<tr>
<td>Preferred Suppliers</td>
</tr>
<tr>
<td>Internal Suppliers</td>
</tr>
<tr>
<td>Travel</td>
</tr>
<tr>
<td>Outreach &amp; Training</td>
</tr>
<tr>
<td>Annual Supplier Fair</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

### myMarketplace User Access Form

- myMarketplace User Access Form (Fillable PDF)

### Procurement Forms

- **NEW!! Online Form:**
  - Change Order and Req or PO Closes Form (may need to use NUNET credentials to access form)
  - Instructions on how to use online form for Change Orders and Req or PO closes (PDF)

- Employee/Independent Contractor Certification Form (PDF)
- Purchase Order Terms and Conditions

### NOTE: The New Vendor Form has been retired. Please put all new vendor information in the 'document text' of requisitions

### Online Ordering Forms

- Agenda Corporate Travel Arranger Form (PDF)
- GA Blanco Profile Form (PDF)

### Other Administrative Forms

- Asset Disposition

### NEW

- Recycle ink & toner label

### Tax Exempt Forms

- Tax Exempt
### Change or Liquidation Request

**Instructions**
A change order to a purchase order must be issued when any of the following elements need to be changed: price, quantity, delivery date, and/or scope of work.

A change order is not required when the value of the change is 10% of the original PO, up to $100.

Please fill out the form below, making sure all necessary fields are completed. By clicking ‘submit’ the requestor is authorizing the changes requested.

---

**Submitter Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Shafner, Lauren</td>
</tr>
<tr>
<td>Department</td>
<td>Procurement Services</td>
</tr>
<tr>
<td>Phone</td>
<td>617/3732341</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:l.shafner@neu.edu">l.shafner@neu.edu</a></td>
</tr>
</tbody>
</table>

If you are not the originator of the document, check here: [ ]

---

**Requested Action**

Please Specify Requested Action: (only one selection per submittal)

- [ ] PO Change
- [ ] PO Liquidation
- [ ] Req Close

**Liquidate/Close the PO**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO Number</td>
<td></td>
</tr>
<tr>
<td>Supplier Name</td>
<td></td>
</tr>
</tbody>
</table>

---

Click Here to Insert Additional Items

---

**Clicking on Submit Authorizes the Changes Requested Above**

[Submit]
Change or Liquidation Request

Instructions
A change order to a purchase order must be issued when any of the following elements need to be changed: price, quantity, delivery date, and/or scope of work.

A change order is not required when the value of the change is 10% of the original PO, up to $100.

Please fill out the form below, making sure all necessary fields are completed. By clicking ‘submit’ the requestor is authorizing the changes requested.

Submitter Information
Submitter Name: Shafner, Lauren
Department: Procurement Services
Phone: 617/3732341
Email: l.shafner@neu.edu

If you are not the originator of the document, check here: ☐

Requested Action
Please Specify Requested Action: (only one selection per submittal)
☐ PO Change
☐ PO Liquidation
☐ Req Close

Purchase Order Number: ☐
Supplier Name: ☐

Change Description / Quantity / Unit Price

<table>
<thead>
<tr>
<th>Line No.</th>
<th>Description</th>
<th>Qty</th>
<th>Unit Price</th>
<th>Current Distribution</th>
<th>New Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Line No.</th>
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<th>Qty</th>
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<th>Current Distribution</th>
<th>New Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click Here to Insert Additional Lines

Change Document Text

Are You Changing or Adding Document Text? ☐ Yes

Change Index or Account Distribution

<table>
<thead>
<tr>
<th>Current Distribution</th>
<th>New Distribution</th>
</tr>
</thead>
</table>
| Seq. # | Index | Account | Amount/% | Index | Account | Amount/%
| ☐ Dollar | ☐ Percent |

Click Here to Insert Additional Lines

comments/instructions for Procurement

Special Instructions
Should the supplier receive the updated purchase order? ☐ Yes ☐ No

Please include Any Special Instructions Here:

Attachments
Click here to attach back-up documentation:

Click Here to Insert Additional Attachments

Clicking on Submit Authorizes the Changes Requested Above

Submit
How To Find A Vendor # In Banner

- Code Look Up!

%Corp% will give you everything that includes “Corp.”
Corp% gives you only what begins with “Corp.”
%Corp gives you only what ends with “Corp.”
Travel

- New Travel Site – [www.neu.edu/travel](http://www.neu.edu/travel)
  - Pre Trip, During Trip & Post Trip Information In One Place
  - Updated Travel Policy Coming Soon!
  - Full Service & Online Travel Agency Currently Out To Bid

- Egencia
  - Recommended For Online Booking Of Domestic Travel
    - Air Fare
    - Hotels - Local & Domestic
    - Auto Rental
    - AMTRAK Rail Service
  - **Travel Arranger Capabilities**
    - Provides a **Travel Registry** For Employees Traveling For Business
      - Ensures Prompt Evacuation In The Event Of An Emergency
    - Travel Synopsis Tool
    - 24x7 Customer Support
    - Competitive Pricing