

# **FINANCE SELF -SERVICE**



Financial Services Division

# Benefits of Self-Service....

- Provides a more intuitive user friendly interface to INB Banner
  - Consistent interface similar to Employee Self-Service and Budget Planner Self-Service, but focusing on Finance transaction processing
  - ‘Point and Click’ drill-down functionality for querying, viewing and processing finance transactions
- Eliminates the cumbersome, inconsistent and complex ‘navigational’ issues associated with Banner INB

# Current Functionality

- Processing routine Finance transactions
  - Approvals processing of Finance transactions
    - Approving Purchase Requisitions, Journal Vouchers and Direct Pay Invoices (DPIs\*)
    - Easy viewing of document approval history
  - Initiating simple Journal Vouchers
  - Querying Finance transactions
    - Drill Down capabilities to access detailed information and view related documents
    - Logical representation of information on one screen
    - Download capabilities to Excel



# Future Functionality

- Develop UNM customizations to integrate DPEZ information
- Banner 8 integration with Xtender document management



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- Begin using on March 1<sup>st</sup>

## DEMO



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# Questions?



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