Description of Banner Finance Roles

The roles listed below are designed for individuals in Colleges, Departments and Administrative Units who will be performing the following tasks. These roles also apply to researchers and/or those individuals who provide financial administration for researchers. Please note that this document is different from the one distributed to Deans and Department Heads in that the roles have been grouped to provide logical training packages.

Financial Administration

- **Purchase Requisition Creation** - entering/creating purchase requisitions on-line in Banner Finance.

- **Entering Receiving** - entering/confirming receipt of goods and services on-line in Banner Finance.

- **Journal Vouchers / Interdepartmental / External Billing Entries, Budget Transfers** – creating/issuing journal vouchers and/or interdepartmental charges and external billings and/or budget transfers on-line in Banner Finance.

- **Fixed Asset Transfer** – tracking the location and custodian of fixed assets/equipment and changing that information to keep their fixed asset records up to date.

- **General Query** - viewing budget information, financial transactions and available balances in Banner Finance. Please note that this access is restricted by the individual’s Fund/Organization security profile.

Budget Planning

- **Budget Development** - downloading budgets from Budget Development into Microsoft Excel spreadsheets, manipulating proposed budgets, and uploading proposed budgets back into Budget Development, if they so wish -- or changing proposed budgets directly on-line in Budget Development.