

Hello Finance Users,

We are writing to confirm the timeline for the switch to Banner 9 Finance Self-Service. This web-based system offers the same functionality as Banner 8 but with an updated, modern interface.

Action	Date
Banner 9 Finance Self-Service Go-Live	Thursday, December 12, 2025
Banner 8 Finance Self-Service Deactivation	Thursday, December 19, 2025

Please note that Banner 8 forms will be fully deactivated on December 19th. We strongly encourage you to begin using the new Banner 9 forms as soon as they go live on December 12th to ensure a smooth transition before the deadline.

Banner 9 Transition Q&A

What's new in Banner 9 Finance Self-Service?

- **Interface:** The system has an updated, web-based, modern look and feel.
- **Functionality:** All existing functionality remains the same.

What stays the same?

- Core actions like approving documents, using MyFinance Query, and viewing documents will function similarly, with only visual changes to the interface.
- **My Finance Query** – Allows you to view and query your financial budget data.
- **My Journals** - Allows you to create and edit multiple journal entries into the Finance Self-Service ledgers. The logged-in users can view only their own journals document. You can use My Journals to perform the following:
 - Copy a journal.
 - Reverse a journal.
 - Delete a journal.
 - Edit a journal.
 - Recall a journal.
 - Add and delete journal attachments.
 - Download a journal as a PDF.
 - Exporting a journal into Excel.
- **Approve Documents** - Allows you to approve or disapprove a document of any type received by the Banner Finance approvals system. Using this page, you can also recall a document of any type sent to the Banner Finance approvals system.

- **Delete Finance Template** - This is an option on the My Finance menu that enables you to delete templates or queries. This can be helpful when you rename templates and want to remove the original through the user interface. The ability to delete templates depends on the privileges associated with your user ID.
- **View Document** – Allows you to select a document to view by following the next steps:
 - Click the Document Type drop-down to select the appropriate document type.
 - To look up a document, use either of the following methods to populate the Document Number field:
 - Click the drop-down under Document Search to choose a document number from the list, or
 - If you have a document number, type it directly into the Document Number field, or
 - Click the Document Number Lookup icon to do an advanced search for a document using the available criteria.
 - After identifying a document number to view, you can:
 - Click View Document to open the document as a PDF.
 - Click Approvals & Related Documents to view related documents, attachments, and approval information.

Where can I get training and support? We have prepared resources to guide you through the transition:

- **JV SOP:** A comprehensive Standard Operating Procedure (SOP) is available to walk you through creating JVs in the new system.

Thank you for your cooperation.