

Banner Finance

General Navigation

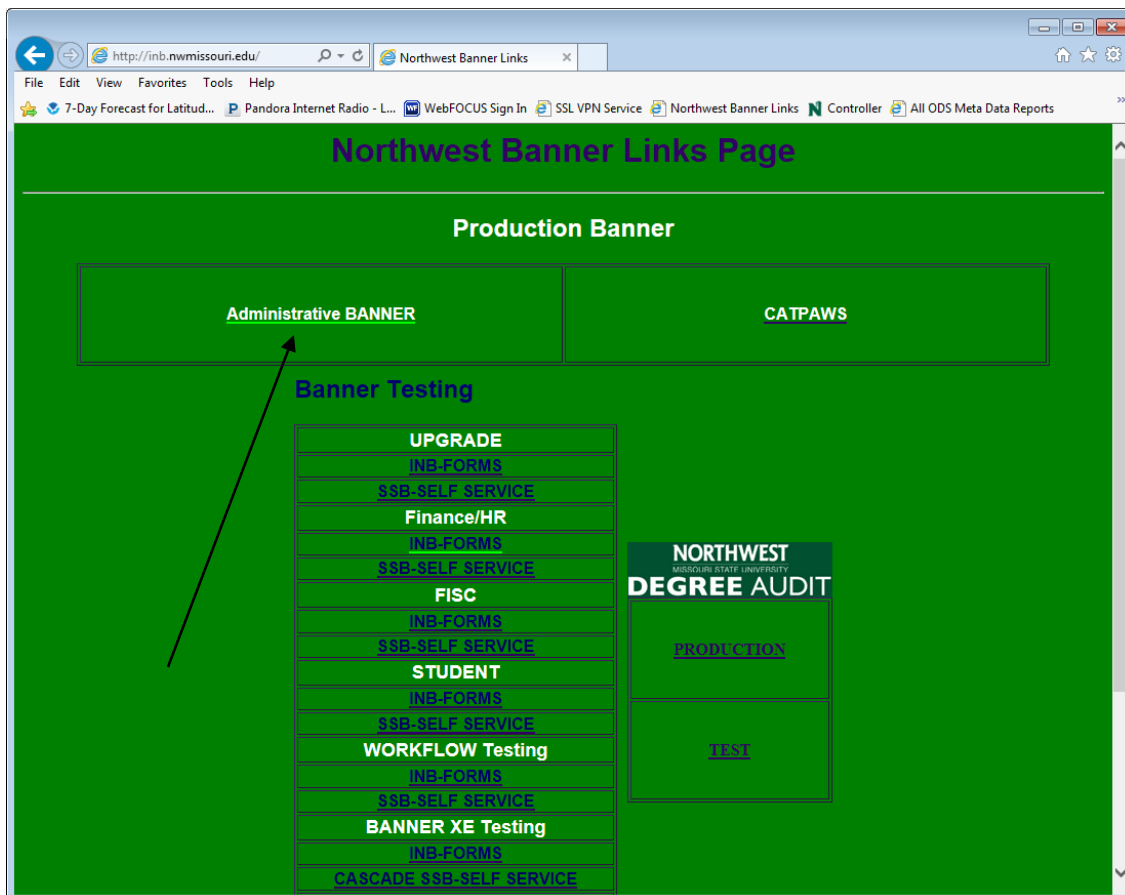
Purpose

The purpose of this manual is to help you with logging into Banner INB (Internet Native Banner) Finance and demonstrate how to navigate through the forms. It is not meant to teach you any specific task, but is designed to make comfortable with:

- Accessing forms
- Navigating from record to record and from block to block
- Finding individual records via searches

Logging Into Banner

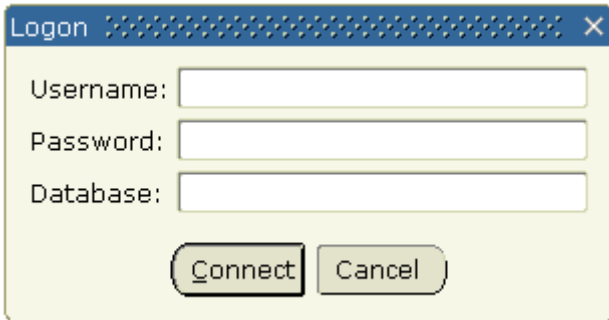
1. Open Internet Explorer
2. Go to <http://inb.nwmissouri.edu/>
3. The follow will be display in your browser:



4. Click on the link 'Administrative Banner'

****NOTE:** If you are logging into Banner for the first time on your computer, Banner will try to install a Java Plug-in. Allow this plug-in to be installed and answer 'yes' to the questions. If you are having difficulty downloading the Java Plug-in, call the Help Desk at ext. 1634.

5. This will open a second window. In the second window a login box displays.



A screenshot of a 'Logon' dialog box. The dialog has a blue title bar with the text 'Logon' and a close button (X). Below the title bar, there are three text input fields: 'Username:', 'Password:', and 'Database:'. At the bottom of the dialog, there are two buttons: 'Connect' and 'Cancel'.

6. Enter your Banner username and password. Do not enter any text in the database field.
7. Press **ENTER** or click **Connect**.

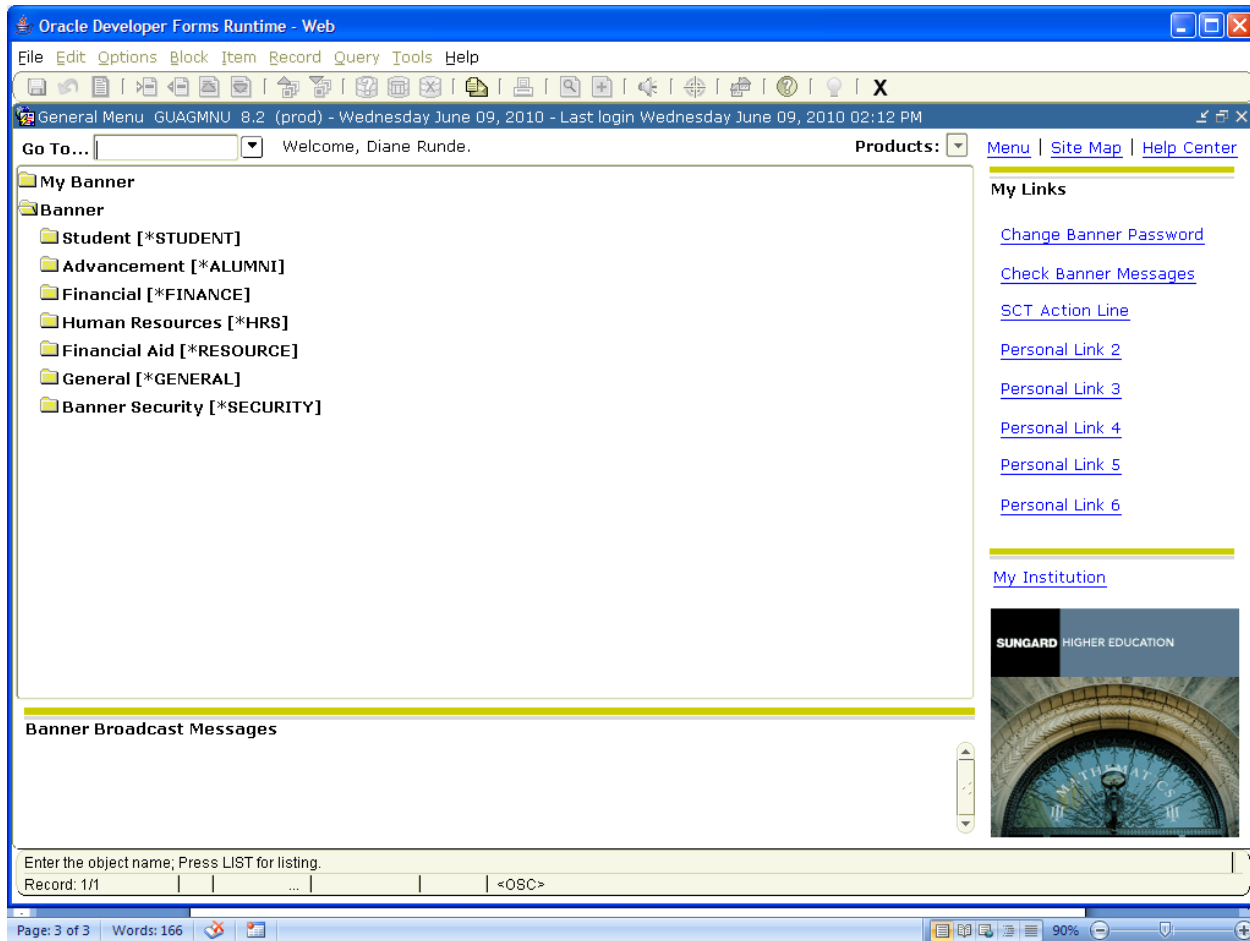
***NOTE: Even though the first window looks blank, it is needed in order run Banner. If you need to use the internet, DO NOT USE THIS WINDOW! You will need to open a new Internet Explorer session instead.*

***NOTE: Since Banner uses pop-up windows, you must allow pop-ups from our Banner website. If your browser displays an information bar notifying you that a pop-up has been blocked, click the Information Bar and select the option to always allow the pop-ups from our website. Once this is done, you should have no further problems accessing Banner.*

General Menu

The first thing you will see after logging in is the Banner General Menu **GUAGMNU**.

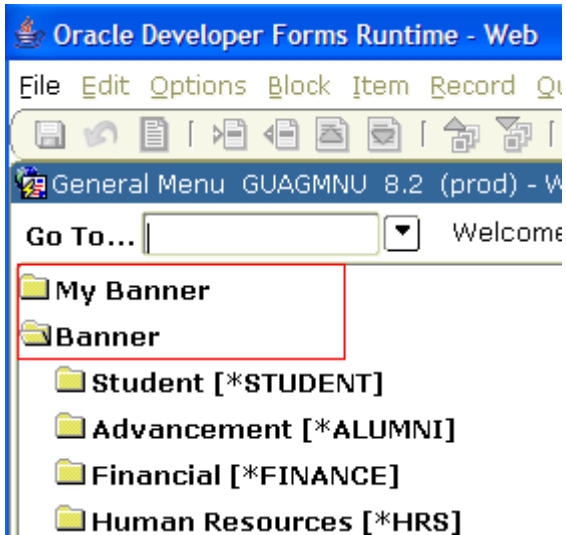
This menu will allow you to select modules, menus and forms.



Banner utilizes a standard Windows user-interface and includes tools and items you are used to seeing within other Windows applications.

My Banner and Banner Folders

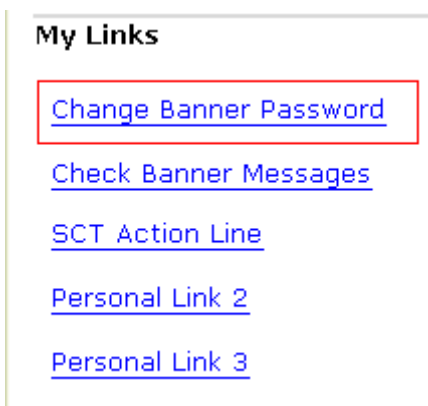
Under the **Go To...** field you see two main folders: **My Banner** and **Banner**, both outlined in red in the example below.



My Banner is a folder you can customize with the forms you use most frequently. Depending on what security your job requires, you may or may not see all the folders listed under the main **Banner** folder in this example.

My Links

My Links is located to the right side of the screen. This is where you will go to change your password.



Forms

A form is an online document where you can enter and look up information in the Banner database. Banner uses many types of forms to enter and access information. A form can be accessed through a series of menus or, if you know the name, by **DIRECT ACCESS**.

Direct Access

Direct Access means that you can immediately access a form without searching through the system menus to locate it.

There are several ways a form can be accessed using Direct Access:

1. Type the seven character name of the form in the **Go To...** field and press ENTER
 - This will take you immediately to the form.
2. Click **File** on the Menu Bar
 - Up to 10 forms you have visited during the current banner session will display at the bottom
 - Once you shutdown for the day, the list will clear out
3. Click in the **Go To...** field and use your UP or DOWN arrows on the keyboard
 - This will cycle through the last forms you have visited
 - When you locate the form you want, press ENTER

Navigating through a Form

You can perform tasks in Banner in the following ways:

- Keyboard Keys
- Pull-Down Menus
- Toolbar icons
- Mouse Click
-

For example: To exit a form you can do any of the following:

Menus: File, Exit
Toolbar: (Left) Click on the **X** (exit)
Mouse: Click **File, Exit**
Keystroke: Control+Q
Right Click on the form and select **Exit**

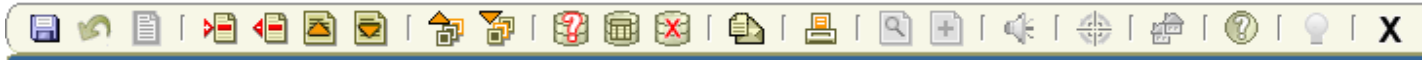
Parts of a Form

There are seven main parts of a form:

- Toolbar
- Title Bar
- Key Block
- Blocks
- Records
- Fields
- Auto/Hint / Status Bar

We will briefly describe the function of each one using the FSAREQN (Stores Requisition) Form.

ToolBar

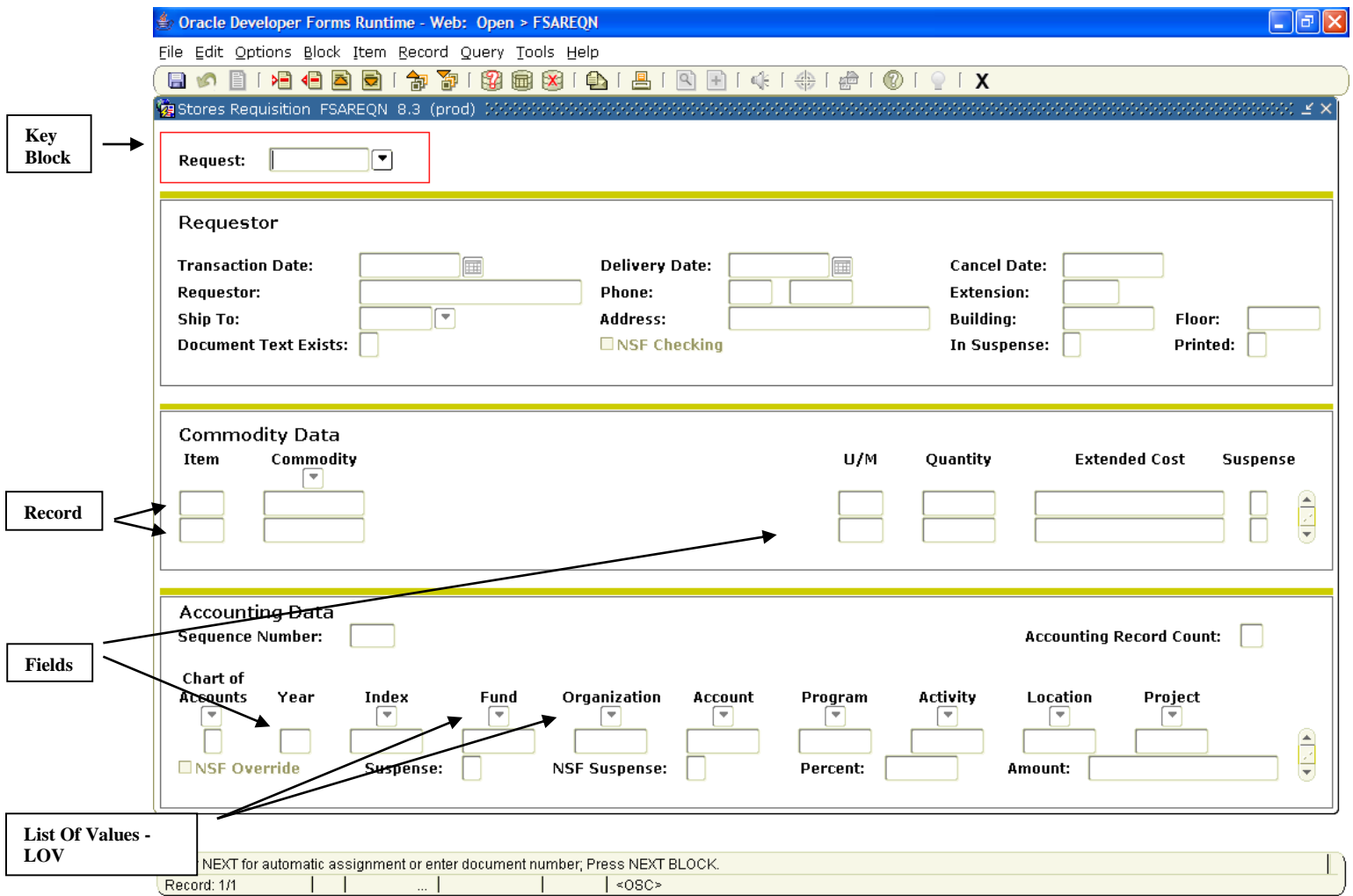


Banner's toolbar has icon buttons for the more commonly used Banner functions. If you pause your mouse over any icon on the toolbar, a popup will appear describing what the icon is used for.

You can also use keyboard shortcuts for most Banner functions. Refer to the 'Banner Finance Quick Reference' document located on the Controller Web Page.

Key Blocks, Blocks, Records and Fields

The very top part of a form is called a **Key Block** (outlined in red below). This is where you will enter the key information for retrieving or creating data. All forms have a key block.



Key Block → Request: []

Requestor

Transaction Date: [] Delivery Date: [] Cancel Date: []
 Requestor: [] Phone: [] Extension: []
 Ship To: [] Address: [] Building: [] Floor: []
 Document Text Exists: [] NSF Checking [] In Suspense: [] Printed: []

Commodity Data

Item	Commodity	U/M	Quantity	Extended Cost	Suspense
[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]

Accounting Data

Sequence Number: [] Accounting Record Count: []

Chart of Accounts: [] Year: [] Index: [] Fund: [] Organization: [] Account: [] Program: [] Activity: [] Location: [] Project: []

NSF Override [] Suspense: [] NSF Suspense: [] Percent: [] Amount: []

Record → []

Fields → []

List Of Values - LOV → []

NEXT for automatic assignment or enter document number; Press NEXT BLOCK.
 Record: 1/1 | ... | <OSC>

As you can see the rest of the form is divided into what looks like blocks. A **block** is a section of the form that contains related information. If a form contains more than one block, each block except for the key block may be enclosed within a border. A **record** is a group of fields that make up a logical unit.

A field is an area on a form where you can enter, query, change, and display specific information. Some fields in Banner allow you to type directly into the space provided to populate the data. However, many other fields only accept codes from a defined **List of Values**. These fields are otherwise know as **LOV** fields.

You can display the list of values for a field in different ways:

- Click on the **down arrow** by the field
- Double-click the field itself
- F9

Double-click the desired value and it will be inserted into the field for you.

Moving from Block to Block

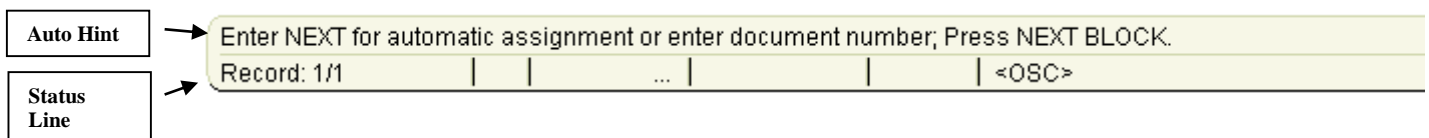
There a few methods you can use to navigate from block to block within a form:

- Select the **Next Block** or **Previous** block icons form the Toolbar
- Menu: Block> Next or Previous
- Control+PAGE DOWN or PAGE UP

Auto Hint / Status Bar

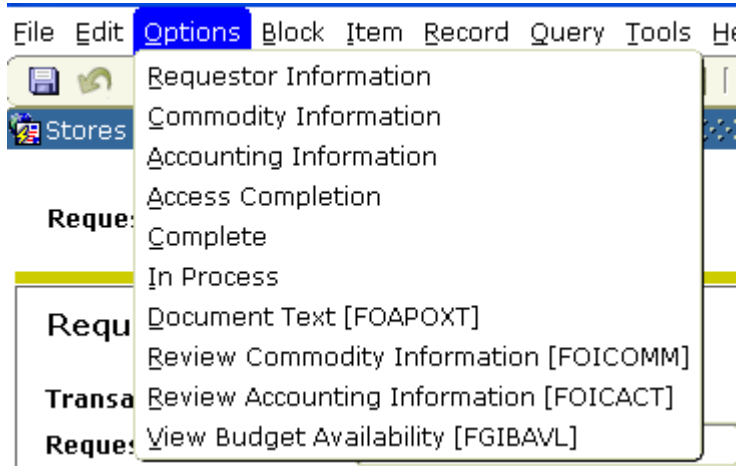
The Auto Hint line is the line at the bottom of the window. This is where Banner will display error, processing and help messages. If Banner doesn't respond to your commands, be sure to check this line for instructions on how to proceed.

The Status Line is also displayed at the bottom of a form and provides information about the number of records displayed and whether all records have been displayed. Make sure to use the scroll bar to view all possible records on a page before moving on..






Options Menu

Under the **Options** menu of each form, you will find a list of various options available to you. Some options take you to a block within the form and others take you outside the form to a related form. When the choice in the Options menu links to another form, that form's name will be in brackets after its description.

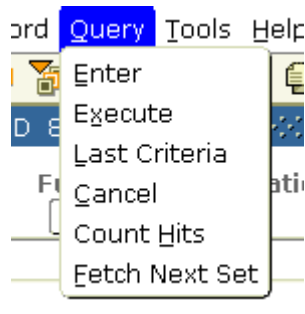


Querying Data and Wildcards

On many Banner Finance Forms you can query on specific data and then only that data appears on the form. There are 3 steps to retrieving data through a query:

- Enter Query  or F7
- Execute Query  or F8
- Cancel Query  or Control+Q

You can also access these functions thru the **Query** drop down menu.



Wildcards allow you to search with greater flexibility. Incorporating a wildcard into your search criteria tells Banner that you are requesting a broader search for records that contain the exact letters or numbers that you entered. The wildcard feature works in many Banner fields. Wildcards can be placed at the beginning, middle, or end of a search field

There are two wildcard symbols in Banner: % and _

- % is the wildcard for many characters
- _ is the wildcard for one character
- % is used more than _

Once you execute a query and the results are not what you want, click to Enter Query to start another query.

Wildcard examples:

Wildcard Example	Results Listed
7% in the account field	All records where the account begins with 7
32% in the organization field	All records where organization begins with 32
%Paper% in commodity code description	All records where the commodity code description has 'Paper' some where within the text
_1% in the account field	All records where the account code has any character in the first position, '1' in the second position, followed by any number of characters.