By the end of today’s session, you will be able to:

- Login to Banner aka ‘Aurora Admin’
- Navigate within Banner
- Use pages to query for information
Logging in to BANNER

- From U of M home page
  1. Click the Faculty and Staff ‘tab’
  2. Click on Aurora Admin

Let's log in!

The Banner login screen will display:
- Enter your Finance User ID and password
- Select Login
Structure of Banner

Accessing Forms

- **Applications → Banner Folders**
  - Student, Finance, General
  - Menus identified by asterisk (*)
  - Forms contain no asterisk

<table>
<thead>
<tr>
<th>Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banner</td>
</tr>
<tr>
<td>My Banner</td>
</tr>
</tbody>
</table>

Opened Menu
Accessing Forms

- **Search Box**
  - Enter page acronym or related function
  - Press the Enter key or select in the drop down

- **Navigation**
  - Each page will display buttons for navigation
    - **Go** – Next section
    - **Start Over** – Query another document in the same page
    - **Filter/Filter Again** – Enter criteria to perform a search
  - Short cut keys are available
Form Acronym

Journal Voucher Quick Form
FGAJVCQ

• F – Financial System
• G – General Accounting Module
• A – Type of Form – Application
• JVCQ – shortened version of form name

Form Types

- **Application:**
  - Used to create a document or to add, change or delete information in a form
    - FGAJVCQ, FTMVEND

- **Query:**
  - Used only to view information. For example, to view a list of journal vouchers that are incomplete
    - FOI DOCH, FTVVEND
**FAIINVE**

- **FAIINVE – Invoice Query**
  - Use to query Banner invoices that begin with an “I”
    - Provides the following information:
      - System contract reference number (if it exists)
      - FOAP(AL) detail
      - Vendor invoice date and number

**FGIDOCR**

- **FGIDOCR – Document Query Screen**
  - Use to query all Banner documents
    - Best Used for journal entries and ID charges
    - Provides the following information
      - ALL debit and credit records (unavailable in FAST)
      - Associated text (if it exists)
**FYMFFORS**

- **FYMFFORS – Signing Authority Query**
  - Use to query signing authorities on a fund, for a department/organization code
  - Provides the following information
    - Signing authorities
    - Financial Services representative

  [http://umanitoba.ca/admin/financial_services/budgrant/signingAuthorities.html](http://umanitoba.ca/admin/financial_services/budgrant/signingAuthorities.html)

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**FRIGRNT**

- **FRIGRNT – Grant Information Query**
  - Use to query a specific grant fund
  - Provides the following information
    - Principle Investigator name
    - Granting Agency
    - Responsible Organization
    - Amount of grant (if provided)
    - End date of grant (if provided)
FTMFUND

- **FTMFUND – Fund Query**
  
  - Use to query the predecessor on a fund
    - Provides the following information
      - Predecessor
      - Fund Type
      - Default Organization and program
      - Date of entry into the system

FAIVNDH

- **FAIVNDH – Travel Claim Query**
  
  - Use to query the status of a travel claim using an employee or student number
    - Provides the following information
      - Travel claim / Reference number
      - Banner invoice #
      - Status
      - Cheque date
      - Cheque number
My Banner

- **Banner’s ‘Favourites’**
  - Use to create a menu of favourites
    - No need to memorize acronyms
  - Go to GUAPMNU for a full list
    - Select the pages and click “Insert Selection”
    - “My Banner” menu will be populated with page name at next login

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Common Queries in BANNER

**FAIINVE – Finding System Contract Information**
- Utilize this form to obtain system contract numbers and additional information pertaining to documents that begin with an “I”. The form provides (1) system contract reference numbers if they exist, (2) FOAPAL information and (3) vendor invoice numbers.

**FAIVNDH – Finding the Status of a Travel & Business Expense Claim**
- Utilize this form to query the status of a travel and business expense claim form using an employee or student number. The form provides (1) travel claim #, (2) Banner invoice #, (3) status, (4) cheque date and (5) cheque number.

**FGIDOCR – Document Look-Up**
- Utilize this form to query all Banner documents, but it is best used for journal entries and ID charges. The form provides (1) all debit and credit records and (2) associated text if it exists.
Common Queries in BANNER

- **FRIGRNT – Grant Details**
  - Utilize this form to query a specific grant fund. The form provides (1) the name of the granting agency, (2) the responsible Organization code, (3) the principal investigator name, (4) amount of grant (if provided) and (5) end date of grant (if provided).

- **FTMFUND – Finding a Fund Predecessor**
  - Utilize this form to query the predecessor on a fund. The form provides (1) the predecessor fund, (2) fund type and (3) default organization and program codes.

- **FYMFORS – Finding Signing Authorities and Responsibilities**
  - Utilize this form to query signing authorities on a fund. The form provides (1) signing authority information and (2) the name of the Financial Services representative.

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BANNER Short Cut Keys

<table>
<thead>
<tr>
<th>Function</th>
<th>Keystroke</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAGE</td>
<td></td>
</tr>
<tr>
<td>Start Over</td>
<td>F5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SECTION</th>
<th>Keystroke</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clear All Section</td>
<td>Shift + F5</td>
</tr>
<tr>
<td>GoNext Section</td>
<td>Alt + Page Down</td>
</tr>
<tr>
<td>Previous Section</td>
<td>Alt + Page Up</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>RECORD</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Clear Record</td>
<td>Shift + F4</td>
</tr>
<tr>
<td>Insert Record</td>
<td>F6</td>
</tr>
<tr>
<td>Delete Record</td>
<td>Shift + F6</td>
</tr>
<tr>
<td>Duplicate Record</td>
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</tr>
<tr>
<td>Next Set of Records</td>
<td>Page Down</td>
</tr>
<tr>
<td>Next Record</td>
<td>↑</td>
</tr>
<tr>
<td>Previous Record</td>
<td>↓</td>
</tr>
</tbody>
</table>

Check your manual for a complete list of shortcut keys.
### Additional Training

- **Banner & FAST Training**
  - Introduction to Aurora Finance
  - Aurora For Researchers
  - BANNER Navigation Fundamentals
  - Journal Entries & Interdepartmental Charges (JE’s & IDC’s)
  - Advanced FAST
  - External Invoicing (FAST A/R)
  - Budget Transfers

- **Concur**
  - Travel and Expense Management

- **EPIC**
  - Introduction to EPIC
  - EPIC – After the Order
  - EPIC Contracts

### Assistance

- **Need additional support?**
  - **Aurora Finance Customer Service Desk** for system support at 204-480-1001 or aurora_finance@umanitoba.ca
  - **Guides, Manual & eLearns** available on the Aurora Finance page
    - Visit the Aurora Finance website Training & Resources Hub
  - **ASK Aurora! Sessions**
  - Subscribe to our client mailing list to stay up to date!
    [http://umanitoba.ca/computing/renewal/aurora/finance/subscribe_to_list.html](http://umanitoba.ca/computing/renewal/aurora/finance/subscribe_to_list.html)
Questions

Thank you!