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Logging In to Banner

Open an internet browser, connect to the UM Intranet (https://umanitoba.sharepoint.com/sites/um-intranet) and do the following:

1. Hover your mouse over Apps and sites.
2. Click on Banner.

3. The Banner sign in screen will display:

4. Enter your UMnetID and password.
5. Click Sign In.
When you log on to Banner, the dashboard will appear:

The following elements appear:

**Search Bar**
- There are two options available for performing a search:
  - Search – Find a page or process by related function or page acronym.
    - Note: A sorting function is available to assist with reviewing the suggested pages in your search results.
  - Direct Navigation – Enter the acronym of the page or process for direct access.

**Main Menu Panel:**
- Click the toggle icon to expand the menu bar to view the quick access tabs

**Tabs available:**
1. Dashboard – Returns you to the homepage of Banner
2. Applications – Access to the Banner, My Banner, My Links folders
3. Search – Another direct access point to search for pages
4. Recently Opened – Return to a page that was opened during your current session or select it to be added as a Favorite.
5. Help – View the help documentation from the software provider and keyboard shortcuts
6. Favorites – Mark pages with a star to appear here
7. Sign Out
8. Username – Change your personal settings

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Banner Applications

There are two applications within the system, Banner and My Banner.

The Banner application provides a list of all menus and pages available in the system. Banner Finance related resources are found within the Finance System Menu (*FINANCE).

There is an acronym associated with every menu, page and process in Banner.

- **Menus** are characterized by an asterisk (*) beside the acronym. Click on the menu name to view the associated menus and pages.
- **Pages** contain no asterisk. To open a page, simply click on the name.

**Accessing Pages**

To access a page, you can:

1. Click on the page name after navigating the Finance menus or
2. Enter the related function or page acronym in the Search Bar

   Press the Enter key on your keyboard after typing the acronym or click on the name of the page as it presents in the drop down menu

**My Banner**

You can populate the My Banner folder to create a personal menu of pages you access most frequently.

1. Enter the page acronym GUAPMNU in the Search Bar.
2. When the page opens, your username will be in the field for Personal Menu. Click Go to proceed.
3. The following page will list all the Banner pages that you have access to on the left-hand side, alphabetically by their Banner description. You can click the Sort Objects button to sort them alphabetically by their page acronym.
4. To add a page to your My Banner menu:
   a. From the list in the left-hand pane, double-click on the page’s acronym or description.
   b. Once selected, its colour will change to blue. Continue selecting pages in this manner before continuing to the next step.
5. When you have selected all the pages you wish to add, click the Insert Selection; all the pages you selected will be added to the right-hand pane.
6. To remove an item from your My Banner list, double-click in the right-hand pane to select it, and click Remove Selection. You can remove all items from your My Banner list by clicking Remove All.
7. Click Save and log out of Banner. Your My Banner menu will be updated the next time you log in.

**My Links**

Another option within the Applications menu is My Links. This option allows you to create your own list of quick links. To create a list, complete the following steps:

1. Click My Links in the Applications menu and select Manage My Links (GUAUPRF).
2. The General User Preferences Maintenance page will open. Select the tab My Links.
3. Under the column User Value, enter the following details:
   a. In the field for Your first personal link description, enter the title of the link as you want it displayed in Banner.
   b. In the field for Your first personal link URL, enter the URL for the webpage.
   Continue adding titles in the fields for personal link description and their associated URL in the corresponding field.
4. Click Save. A message will appear confirming the changes that have been made.
5. Log out of Banner and log back in to view the populated links in My Links.
Menu Bar and Navigation Keys

Menu Bar
The Menu bar is located at the top right in every page.

The options available are:

- **Add & Retrieve** – These functions are currently not in use.
- **Related** – Displays a list of additional pages related to the information that you are currently viewing.
- **Tools** – Lists actions such as print screenshot and export, options for navigating within a page, banner document management, and page layout preferences.

Navigation Keys
Each page will display the required keys needed for navigation.

The most commonly used are:

<table>
<thead>
<tr>
<th>Key</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Go</strong></td>
<td>To enter into the next section of information or to retrieve information.</td>
</tr>
<tr>
<td><strong>Up and down arrows</strong></td>
<td>To navigate between next and previous sections within a page.</td>
</tr>
<tr>
<td><strong>Start Over</strong></td>
<td>Search for a new document while remaining in the same page.</td>
</tr>
<tr>
<td><strong>Filter/Filter Again</strong></td>
<td>To be provided with a list of field options for performing a search.</td>
</tr>
<tr>
<td><strong>Message Centre</strong></td>
<td>Hints, errors, and success messages will appear when working in the pages. Click on the message for it to disappear.</td>
</tr>
<tr>
<td><strong>Exit</strong></td>
<td>Closes the current page you are viewing.</td>
</tr>
</tbody>
</table>

- From the keyboard – see Banner Shortcut Keys (page 12)
Working within a Page

Every page within Banner is comprised of common elements and sections.

They are as follows:

**Page Header:**
- Title of the page you are viewing
- Menu bar
- Message Centre

**Key Block:**
- Data enterable fields that determine the information that will be displayed in the page.

**Section:**
- Section of a page containing related information.
- Move from one section of information to the next within a page.
- If a page consists of more than one section, each section is separated from the other with a line or is in a separate box.

**Field:**
- Area on a page where you can enter, query, change or display specific information.
Record:
- Set of related fields. In the example below, the fields all relate to the journal voucher being created. Each debit and credit line of the journal voucher will be a separate record – see below.

Searches and Queries

Field Search
This function is available for specific fields where there are one or more Banner tables that can provide the data required for the field. You know a field search is available when the following indicator exists:

![Lookup Icon]
- Always located beside a field that can be populated with information.
- A window where you can search for a value or information related to the field.

Record Search
Searching for different types of records requires utilizing different pages. The search pages available allow you to search based on a variety of fields. There are several tools that can be used when searching a page for a record:

![Filter]
- To be provided a list of filter options for performing a search.
Filter Again
- Returns filter options to enter new or additional information for a search.

Clear All
- Clears the criteria and the chosen filters.

Go
- Provides the information/records that match your search criteria.
- If you did not provide any search criteria, the query will provide all records.

Multiple Records
- View multiple records at a time.

Single Record
- View one record at a time.

Cancel Query
- Cancels the query and exits the page.

Record Pagination
- Use the forward and backward arrows to display the next set of records within a page or choose the number of records to be displayed on each page.
- Useful when there are a large number of records returned from your query.

Customize Pages
- Reorder columns or rows by dragging and dropping in the order you prefer.
- Select your choice of filter options.
- Choose how many records to display in a page.
- Click Settings to save your preferences or restore the page to the default settings.

Wildcards
- Two wildcards can be used to limit your search:
  - The character % represents any number of unspecified characters.
  - The character _ represents one occurrence of an unspecified character.

Common Queries

FIAINVE – Invoice/Credit Memo Query
Utilize this page to obtain detailed information on invoiced items and FOAPAL elements used.

1. From the FAST Transaction Details Report, write down the number that appears in the Document column for the invoice you want to locate.
2. In Banner, enter FIAINVE in the Search bar then press the Enter key. The Invoice/Credit Memo Query page will display.
3. In the **Document** field, enter the number that you recorded in step 1.

4. Click **Go** to retrieve the document information.

5. The Invoice/Credit Memo Header section will display.

6. Select **Document Text (FOATEXT)** from the Related menu.

7. The FOATEXT page displays the additional information regarding the document.

8. Click the **Exit** icon to return to FAIVNE.

9. Use **Next Section** and **Previous Section** icons to view the different sections of the page.

10. In the Commodity Information – Direct Pay/General Encumbrance section, use the arrow keys on your keyboard to view the details of the items paid for on the invoice and the FOAP(AL)s used to pay for the items.

**FAIVNDH – Finding the Status of a Travel & Business Expense Claim**

Utilize this page to query the status of a travel and business expense claim form using an employee or student number. The page provides (1) travel claim #, (2) Banner invoice #, (3) status, (4) cheque date and (5) cheque number.

1. Enter **FAIVNDH** in the Search bar then press the Enter key. The Vendor Detail History page will display.

2. Enter “E” and then the **employee number** in the Vendor field.
   *If you do not know the employee number or you are querying a student, use the lookup icon to the right of the field to query.*

3. Tab past the Vendor field and the number will change to the appropriate Banner ID.

4. Enter a different 2-digit year in the Fiscal Year column if needing to query a claim in a year other than the default.

5. Click **Go** to retrieve the information.

6. The Vendor Invoice field will display the travel claim number and associated payment information.

**FGIDOCR – Document Look-Up**

Utilize this page to query all Banner documents, but it is best used for journal entries and ID charges. The page provides (1) all debit and credit records and (2) associated text if it exists.

1. Enter **FGIDOCR** in the Search bar then press the Enter key. The Document Retrieval Inquiry page will display.

2. In the **Document** field, enter the number of the document you wish to query.

3. Select **Go** to continue.

4. All the debit and credit records for the document will appear in the Detail Information section along with a brief description and the FOAP(AL)s.

5. In the Header Information, if the Document Text box is checked, click the Related menu and select **Document Text (FOATEXT)**. Associated text for the document will display.

6. Select the **Exit** icon to return to the page.
**FRIGRNT – Grant Details**
Utilize this page to query a specific grant fund. The page 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).

1. Enter FRIGRNT in the Search bar then press the Enter key. The Grant Code Inquiry page will display.
2. Enter in the Grant field, “G00” and then your six digit grant fund number
3. Click Go to run the query. The results of your query will display.

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

1. Enter FTMFUND in the Search bar and then press the Enter key. The Fund Code Maintenance page will display.
2. Click Filter.
3. Enter the fund number in the Fund field provided.
4. Click Go to run the query. The results of your query will display.

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

1. Enter FYMFORS in the Search bar then press the Enter key. The Fund Organization Resp. Tracking Maintenance page will display.
2. In your search, you can enter data in all or some of the following fields:
3. **Fund Code:** Enter your 6 digit data-enterable Fund code
4. **Orgn:** Enter your 6 digit data-enterable Organization code
5. **Resp Code:** Choices are PS, AS, PM, or FS
6. **Active:** Defaults to checked to display only active records
7. **Emp. Number:** Enter E and then the employee number
8. Click Go to run the query. The results of your query will display below.

**Note:** To perform another query in the page, click **Start Over** to return to the beginning of the page.
<table>
<thead>
<tr>
<th>Function</th>
<th>Keystroke</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Over</td>
<td>F5</td>
</tr>
<tr>
<td>Clear All Section</td>
<td>Shift + F5</td>
</tr>
<tr>
<td>Go/Next Section</td>
<td>Alt + Page Down</td>
</tr>
<tr>
<td>Previous Section</td>
<td>Alt + Page Up</td>
</tr>
<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>
<td>F4</td>
</tr>
<tr>
<td>Next Set of Records</td>
<td>Page Down</td>
</tr>
<tr>
<td>Previous Set of Records</td>
<td>Page Up</td>
</tr>
<tr>
<td>Next Record</td>
<td></td>
</tr>
<tr>
<td>Previous Record</td>
<td></td>
</tr>
<tr>
<td>Toggle Record View</td>
<td>Ctrl + G</td>
</tr>
<tr>
<td>Duplicate Field</td>
<td>F3</td>
</tr>
<tr>
<td>Next Field</td>
<td>Tab</td>
</tr>
<tr>
<td>Previous Field</td>
<td>Shift + Tab</td>
</tr>
<tr>
<td>Filter</td>
<td>F7</td>
</tr>
<tr>
<td>Execute Query</td>
<td>F8</td>
</tr>
<tr>
<td>Count Query Hits</td>
<td>Shift + F2</td>
</tr>
<tr>
<td>Cancel Query</td>
<td>Ctrl + Q</td>
</tr>
<tr>
<td>Drill Down</td>
<td>F3</td>
</tr>
<tr>
<td>Save (Commit)</td>
<td>F10</td>
</tr>
<tr>
<td>Select (Exit w/Value)</td>
<td>Alt + S</td>
</tr>
<tr>
<td>Scroll Right</td>
<td></td>
</tr>
<tr>
<td>Scroll Left</td>
<td></td>
</tr>
<tr>
<td>Print</td>
<td>Ctrl + P</td>
</tr>
<tr>
<td>Help</td>
<td>Ctrl + Shift + L</td>
</tr>
<tr>
<td>Exit</td>
<td>Ctrl + Q</td>
</tr>
<tr>
<td>Cancel</td>
<td>Esc</td>
</tr>
<tr>
<td>Export</td>
<td>Shift + F1</td>
</tr>
<tr>
<td>Related</td>
<td>Alt + Shift + R</td>
</tr>
<tr>
<td>Dashboard</td>
<td>Ctrl + Shift + X</td>
</tr>
<tr>
<td>Applications</td>
<td>Ctrl + M</td>
</tr>
<tr>
<td>Open Search</td>
<td>Ctrl + Shift + Y</td>
</tr>
<tr>
<td>Recently Opened</td>
<td>Ctrl + Y</td>
</tr>
<tr>
<td>Favorites</td>
<td>Ctrl + D</td>
</tr>
<tr>
<td>Sign Out</td>
<td>Ctrl + Shift + F</td>
</tr>
<tr>
<td>Main Menu Panel</td>
<td></td>
</tr>
</tbody>
</table>

**Banner Shortcut Keys**

**Function**

- **Page**
  - Start Over: F5
  - Clear All Section: Shift + F5
  - Go/Next Section: Alt + Page Down
  - Previous Section: Alt + Page Up

- **Section**
  - Clear Record: Shift + F4
  - Insert Record: F6
  - Delete Record: Shift + F6
  - Duplicate Record: F4
  - Next Set of Records: Page Down
  - Previous Set of Records: Page Up
  - Next Record: 
  - Previous Record: 
  - Toggle Record View: Ctrl + G

- **Record**
  - Duplicate Field: F3
  - Next Field: Tab
  - Previous Field: Shift + Tab

- **Field**
  - Filter: F7
  - Execute Query: F8
  - Count Query Hits: Shift + F2
  - Cancel Query: Ctrl + Q

- **Query**
  - Drill Down: F3
  - Save (Commit): F10
  - Select (Exit w/Value): Alt + S
  - Scroll Right: 
  - Scroll Left: 
  - Print: Ctrl + P
  - Help: Ctrl + Shift + L
  - Exit: Ctrl + Q
  - Cancel: Esc
  - Export: Shift + F1
  - Related: Alt + Shift + R
  - Dashboard: Ctrl + Shift + X
  - Applications: Ctrl + M
  - Open Search: Ctrl + Shift + Y
  - Recently Opened: Ctrl + Y
  - Favorites: Ctrl + D
  - Sign Out: Ctrl + Shift + F

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