



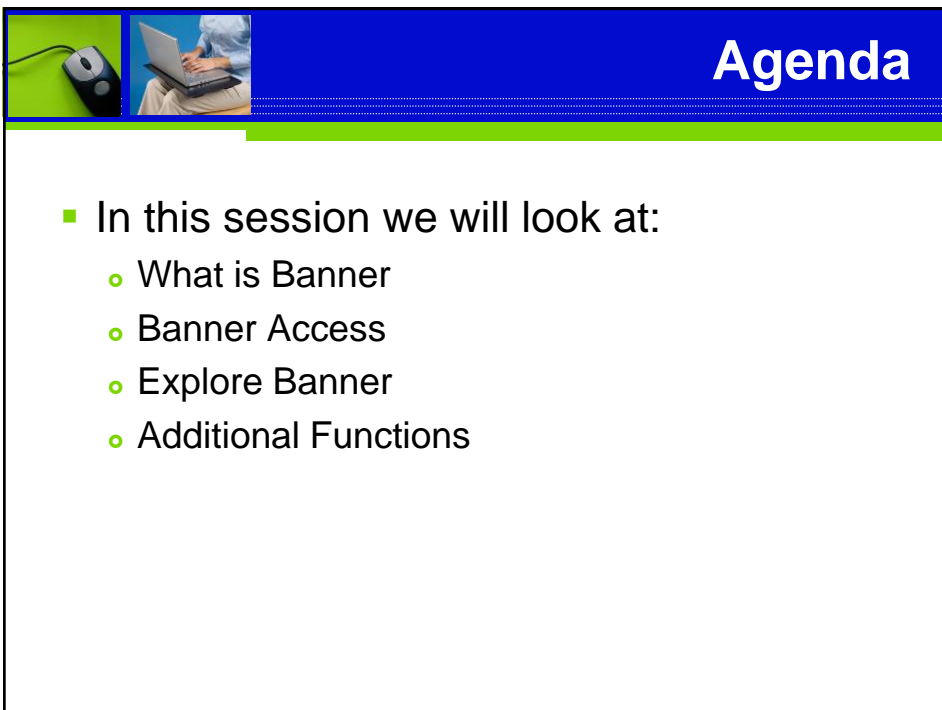
The slide features a header with three images: a computer mouse on a green background, a person using a laptop, and a solid blue background with white dotted lines. Below the header is a green bar with the text "Banner Navigation". The main content area is white and contains the "AURORA Finance" logo, which consists of a stylized blue and green wave above the word "AURORA" in blue and "Finance" in green.

Banner Navigation



AURORA
Finance

1




The slide features a header with three images: a computer mouse on a green background, a person using a laptop, and a solid blue background with white dotted lines. Below the header is a green bar with the text "Agenda". The main content area is white and contains a bulleted list of topics.

Agenda

- In this session we will look at:
 - What is Banner
 - Banner Access
 - Explore Banner
 - Additional Functions


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Expectations

- By the end of today's session, you will be able to:
 - Log in to *Banner* aka 'Aurora Admin'
 - Navigate within Banner
 - Use pages to query for specific information


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Banner

- What is Banner?
 - Main engine of the Aurora Finance system
 - Core component of our accounting system
 - Records every financial transaction
 - Various systems are connected to Banner in order to feed and/or pull information


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Banner Access

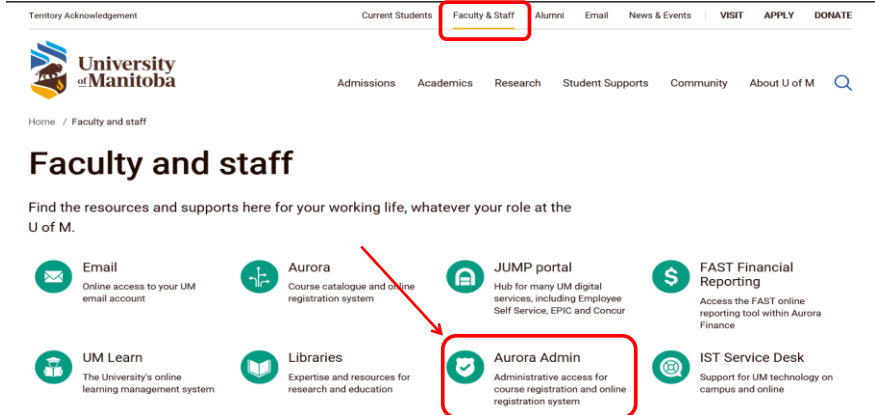
- Gaining access to Banner
 - Complete the Aurora Finance System Access Form
- Three types of access
 - Query
 - View information in pages
 - Posting
 - Ability to create transactions
 - Both Query and Posting

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Logging in to BANNER

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



The screenshot shows the University of Manitoba website. The navigation menu at the top includes 'Territory Acknowledgement', 'Current Students', 'Faculty & Staff' (highlighted with a red box), 'Alumni', 'Email', 'News & Events', 'VISIT', 'APPLY', and 'DONATE'. Below the navigation menu, the 'Faculty and staff' page is displayed. The page title is 'Faculty and staff'. Below the title, there is a section titled 'Find the resources and supports here for your working life, whatever your role at the U of M.' with several links: 'Email', 'Aurora', 'JUMP portal', 'FAST Financial Reporting', 'UM Learn', 'Libraries', 'Aurora Admin' (highlighted with a red box and an arrow), and 'IST Service Desk'.

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Logging in to BANNER

- The Banner login screen will display:
 - Enter your Finance User ID and password
 - Select Sign In

SIGN IN

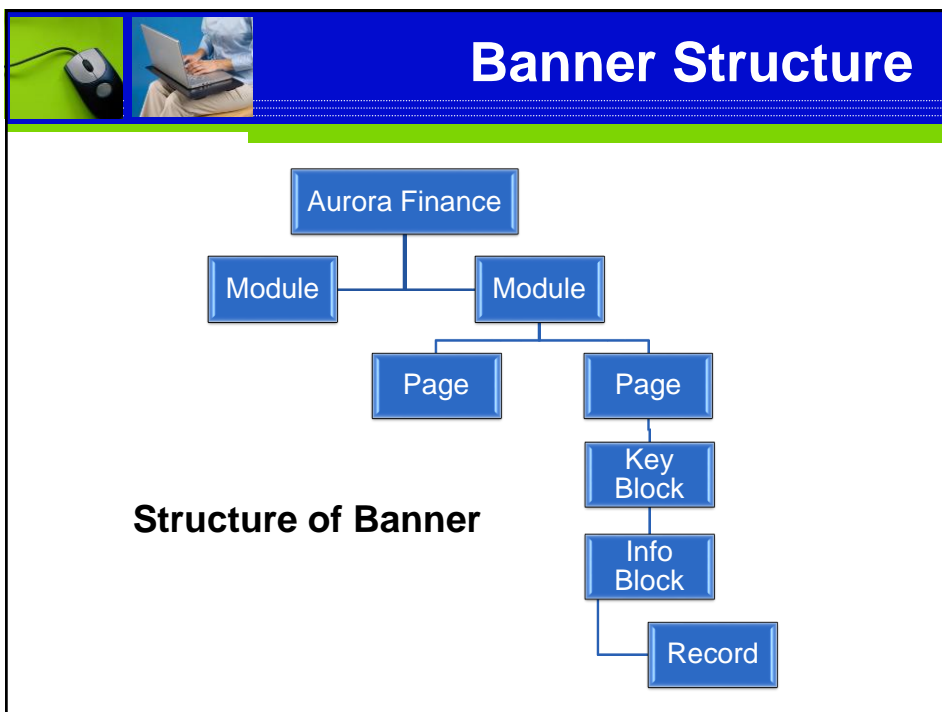
Username

Password

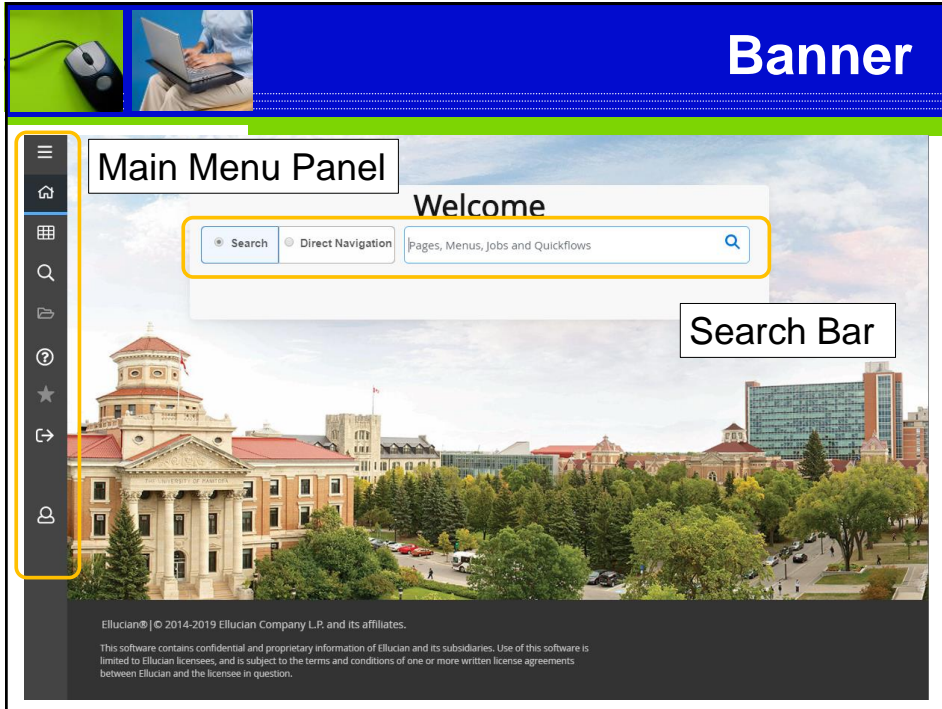
Remember me on this computer

SIGN IN

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Navigation

- **Main Menu Panel**
 - Quick access to functions in the system
 - Stays in place throughout navigation

Dashboard

Applications

Search

Recently Opened

Help

Favorites

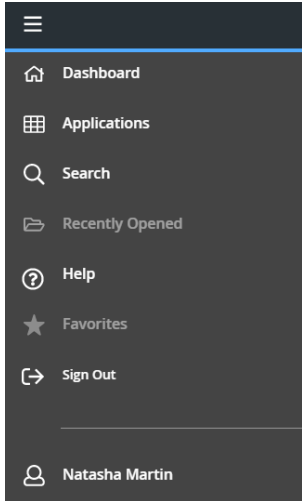
Sign Out

Natasha Martin

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Navigation

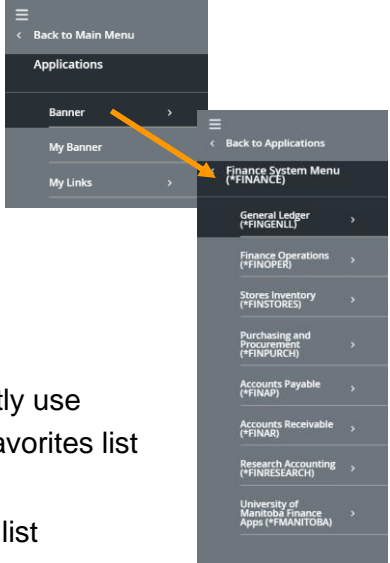
- Dashboard
 - Returns you to the homepage
- Applications
 - Access Banner, My Banner, My Links
- Search
 - Look up pages
- Recently Opened
 - Lists the pages that you have visited during your session
- Help
 - Software provider's documentation
- Favorites
 - Mark pages from My Banner as Favorites to be easily accessible
- Sign Out
 - Logs you out of the system



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Accessing Pages

- Applications
 - Banner
 - Access to Modules and Pages:
 - Student, Finance, General
 - Menus identified by asterisk (*)
 - Pages contain no asterisk
 - My Banner
 - Add pages that you frequently use
 - Mark with a star to add to Favorites list
 - My Links
 - Create your own quick links list



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Accessing Pages

- Search Bar

Welcome

Search
 Direct Navigation

Pages, Menu, Jobs and Quickflows
- Access pages directly through these options:
 - Search
 - Type in the related function for the page you are looking for
 - Direct Navigation
 - Type in the acronym of the page

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Navigation

- Buttons for Navigation

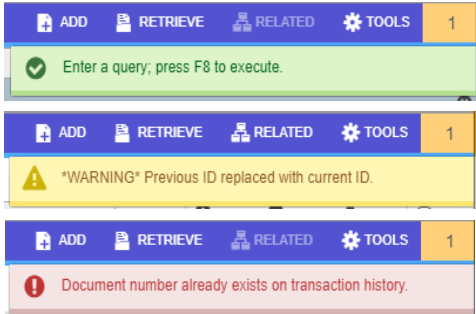
Go – Retrieve information	<input type="button" value="Go"/>
Previous/Next Section – View the next section of information	<input type="button" value="▲"/> <input type="button" value="▼"/>
Start Over – Search for a new document while remaining in the same page	<input type="button" value="Start Over"/>
Filter/Filter Again – Provides options for search fields	<input type="button" value="Filter"/> <input type="button" value="Filter Again"/>
- Short cut keys are available

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Navigation

- **Message Centre**
 - Provides hints, errors and success notifications when working in pages.

- Green is informational
- Yellow is a warning
- Red is an error




The image shows three stacked screenshots of the Message Centre interface. Each screenshot has a blue header with icons for 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS', and a '1' in an orange box. The first screenshot shows a green notification bar with a checkmark icon and the text 'Enter a query; press F8 to execute.' The second screenshot shows a yellow notification bar with a warning triangle icon and the text '*WARNING* Previous ID replaced with current ID.' The third screenshot shows a red notification bar with an exclamation mark icon and the text 'Document number already exists on transaction history.'

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Navigating Pages

- **Menu bar**
 - **Add and Retrieve**
 - Banner Document Management.
 - **Related**
 - List of other pages relating to the information you are viewing in a current page such as Document Text.
 - **Tools**
 - Options and actions that can be performed on the current page such as clear record or print.



The image shows a screenshot of the menu bar. It has a blue background with four buttons: 'ADD' with a document icon, 'RETRIEVE' with a document icon, 'RELATED' with a document icon, and 'TOOLS' with a gear icon. Below the buttons is a search input field with a 'Go' button.

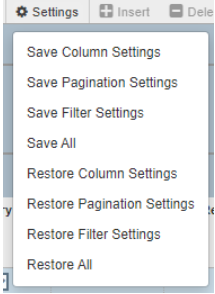
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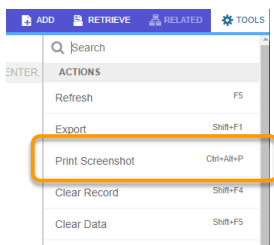


Additional Functions


- Customize your pages
 - Reorder columns or rows
 - Select your choice of filter options
 - Choose the amount of results to display
 - Save your preferences or restore them to the default settings

- Print Screenshot
 - From Tools, print exactly what you see on your screen





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Page Acronym

Journal Voucher Quick Page

FGAJVCQ

- F – Financial System
- G – General Accounting Module
- A– Type of Page – Application
- JVCQ – shortened version of page name


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Page Types

- **Application:**
 - Used to create a document or to add, change or delete information in a page
 - FGAJVCQ, FTMVEND
- **Query:**
 - Used only to view information. For example, to view a list of journal vouchers that are incomplete
 - FOIDOCH, FTVVEND


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FAINVE

- **FAINVE – 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


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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)

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FYMFORS

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

http://umanitoba.ca/admin/financial_services/budgrant/signing_authorities.html


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Exercises

- **FAINVE - Exercise #1, #2**
- **FGIDOCR - Exercise #3, #4**
- **FYMFORS - Exercise #5, #6, #7**


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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)


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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

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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


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Exercises

- **FRIGRNT - Exercise #8, #9**
- **FTMFUND - Exercise #10, #11**
- **FAIVNDH - Exercise #12, #13**

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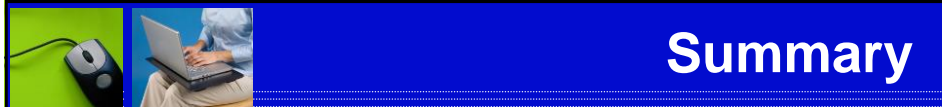


BANNER Short Cut Keys

	Function	Keystroke
PAGE	Start Over	F5
	Clear All Section	Shift + F5
SECTION	Go/Next Section	Alt + Page Down
	Previous Section	Alt + Page Up
RECORD	Clear Record	Shift + F4
	Insert Record	F6
	Delete Record	Shift + F6
	Duplicate Record	F4
	Next Set of Records	Page Down
	Next Record	↑
	Previous Record	↓

Check your manual for a complete list of shortcut keys


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The header of the slide features a blue background with the word "Summary" in white. To the left, there is a small inset image showing a person's hands on a laptop keyboard, with a mouse visible in the foreground.


Summary

- All financial transactions are recorded in Banner
- Access is granted through the Aurora Finance Systems Access request form
- Navigate to pages through the Main Menu Panel or Search Bar
- Use various pages to query for information on documents, transactions and funds


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The header of the slide features a blue background with the word "Questions" in white. To the left, there is a small inset image showing a person's hands on a laptop keyboard, with a mouse visible in the foreground.

Questions


A large, blue, glossy circular icon containing a white question mark is centered on the slide.

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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



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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
<http://umanitoba.ca/computing/renewal/aurora/finance/index.html>
 - 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

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Thank you!



The logo for AURORA Finance features a stylized wave graphic above the text. The wave is composed of two overlapping, flowing lines, one blue and one green. Below the wave, the word "AURORA" is written in a bold, blue, sans-serif font, and the word "Finance" is written in a green, sans-serif font directly underneath it.