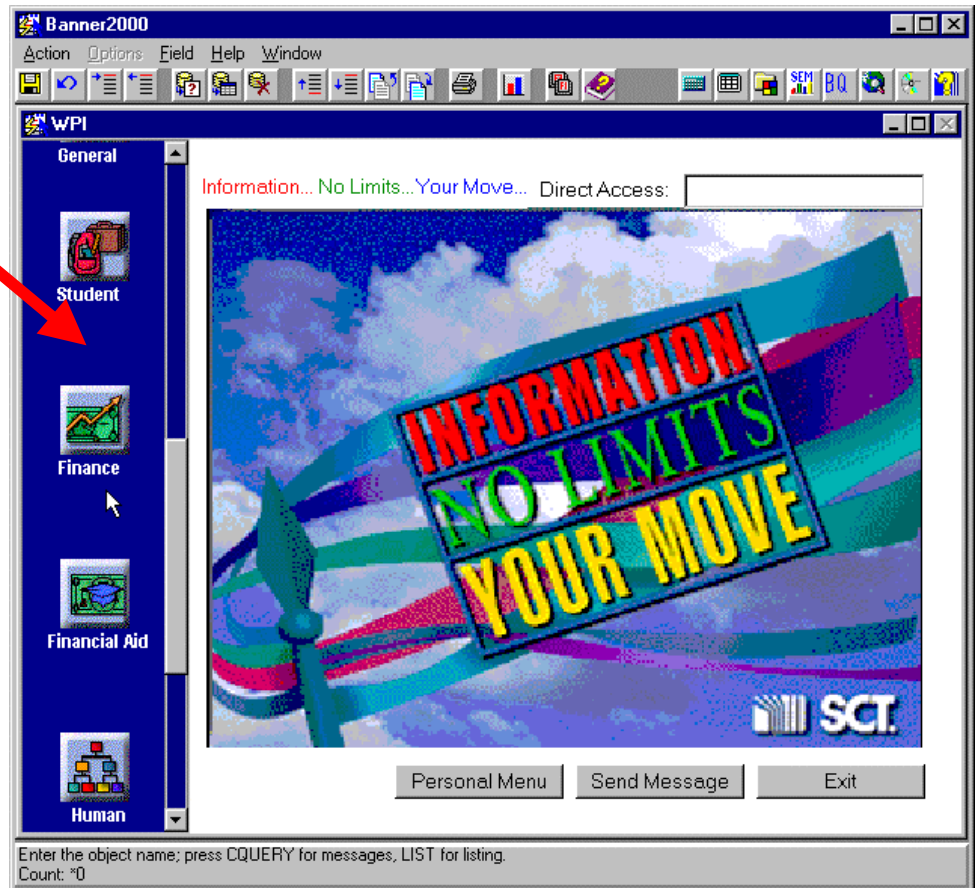






## Banner Welcome Screen

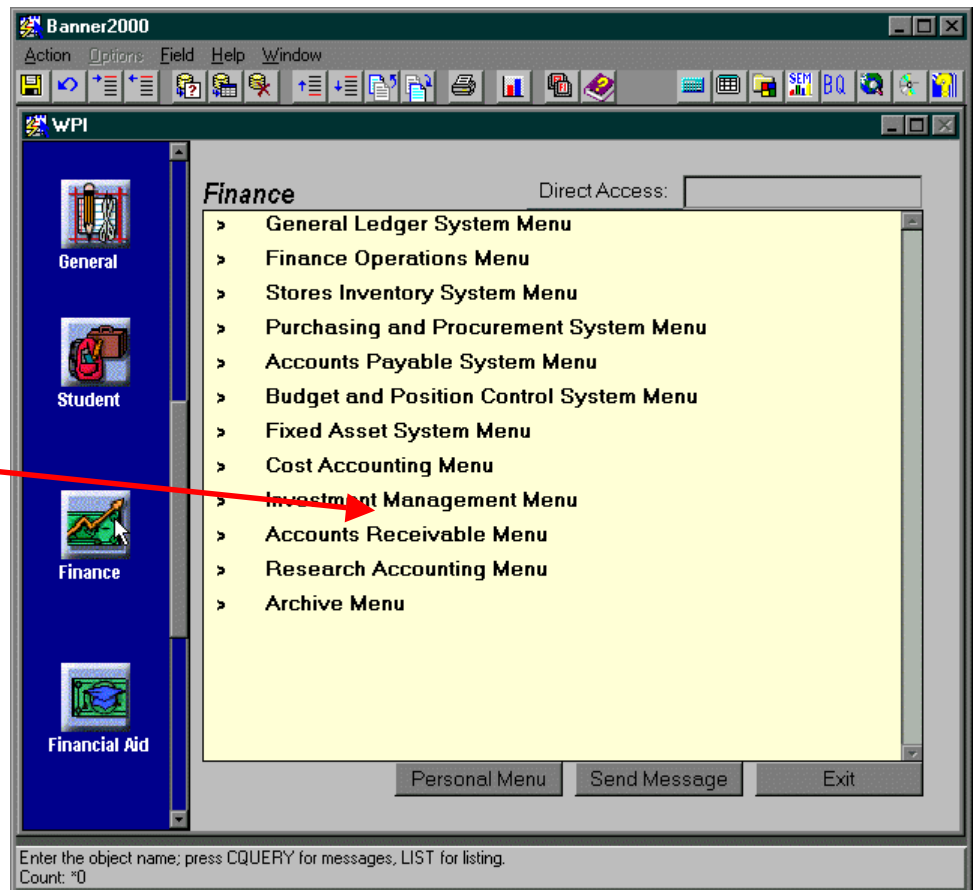
After logging in to Banner, you are prompted with the Banner Welcome screen. Position your mouse over the down arrow of the vertical scrollbar to the left of the Banner window. Click the down arrow until the Finance module button appears. Click on the Finance module button. The full Finance menu should then appear.



## Banner Finance Menu

The Banner Finance menu now appears. This menu lists all the **forms** (or screens) in the Finance module. *Users do not have access to all forms.* Since there are over one hundred (100) forms in the Finance module, the College Computer Center has created a "Personal Menu" which lists some of the forms that are available to a general user.

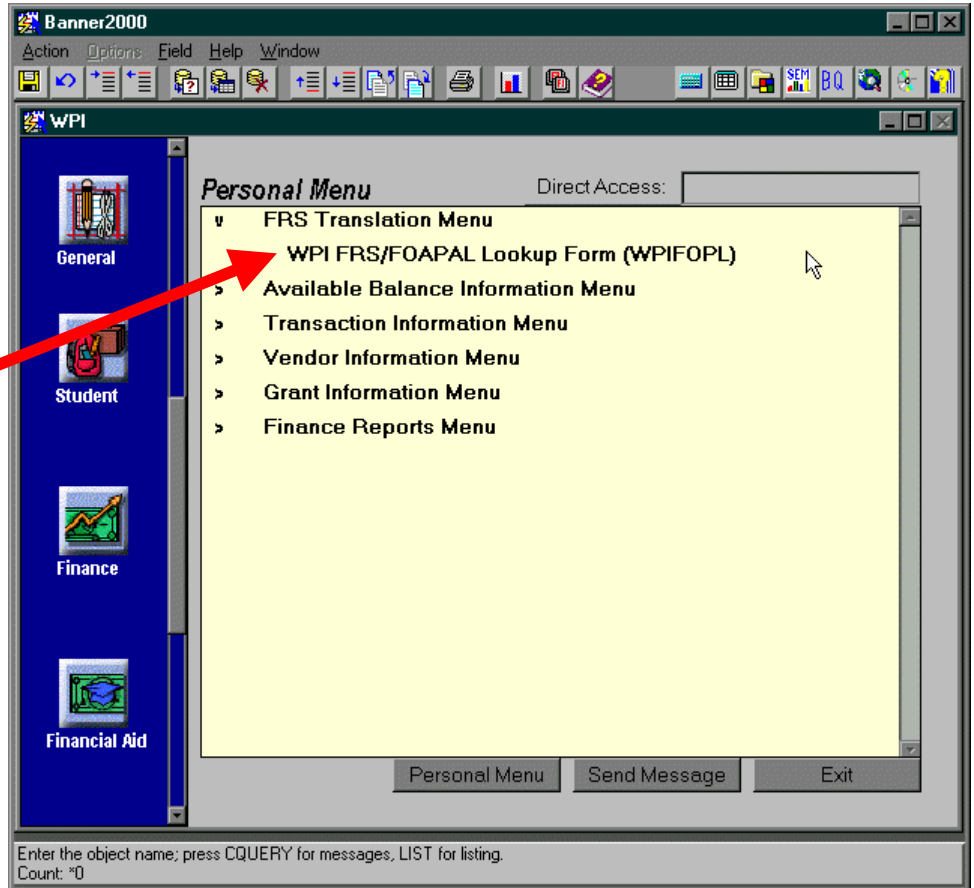
To access this Personal Menu, click the **Personal Menu** button



## The WPI Personal Menu

The first item on the Personal Menu is the **FRS Translation Menu**. To expand the **FRS Translation Menu**, click the carat symbol (>) to the left of the menu text. The menu will expand and the carat symbol changes to (v).

Under the **FRS Translation Menu** is the **WPI FRS/FOAPAL Lookup Form (WPIFOPL)**. Click this menu item to access the **WPIFOPL** form.



## WPI Crosswalk Lookup Form (WPIFOPL)

The form pictured below is called the **WPI Crosswalk Lookup Form (WPIFOPL)**. This form allows you to enter your old FRS account number, and the computer translates to your new Banner FOAPAL string. You can use this feature during the transition from FRS to Banner. Although, it will continue to be available in your Personal Menu.

FRS Data		Banner Data	
Frs Account	Frs Object	Fund	
212800	3100	11001	General Operating Funds
		Organization	8100 College Computer Center
		Account	7111 Supplies
		Program	410 Academic Support
		Activity	
		Location	

Rollback    Exit

Enter account used in FRS system, then press Tab or Return  
Count: \*0

Enter the FRS Account Number press tab

Enter the FRS Object number (or leave blank) Press tab

View the FOAPAL string

Click Exit when finished

## Parts of a Form

The screenshot shows the Banner2000 interface for the Budget Availability Status Form. The window title is "Banner2000" and the form title is "Budget Availability Status Form [FGIBAVL 3.1](Upgrd)". The menu bar includes Action, Edit, Options, Block, Field, Record, Query, Help, and Window. The toolbar contains various icons for file operations and data management. The form is divided into several sections:

- Header Block:** Contains input fields for Chart (1), Fiscal Year (98), Index, Commit Ind (Both), Fund (11001), Orgn (8100), Account (7111), and Program (410). The corresponding values are displayed in a table below.
- Records:** A table displaying budget data for various accounts.
- Display Block:** The main table area showing columns for Acct, Title, Adj Budget, YTD Activity, Commitments, and Avail Bal.
- Status/Help Bar:** Located at the bottom left, showing "Account Code. Count: \*5".
- Function Buttons:** "Rollback" and "Exit" buttons are located at the bottom right.

Annotations on the left side of the image identify the following components:

- Menu Bar
- Toolbar
- Form Name
- Header Block
- Records
- Display Block
- Status/Help Bar

Annotations on the right side of the image identify the following components:

- Direct Access Code
- Database
- LOV buttons (List of Values buttons)
- Vertical Scrollbar
- Fields
- Function Buttons

Chart	1	Fund	11001	General Operating Funds
Fiscal Year	98	Orgn	8100	College Computer Center
Index		Account	7111	Supplies
Commit Ind	Both	Program	410	Academic Support

Control Keys	-> Fund: 11001	Orgn: 8100	Account: 7111	Program:
--------------	----------------	------------	---------------	----------

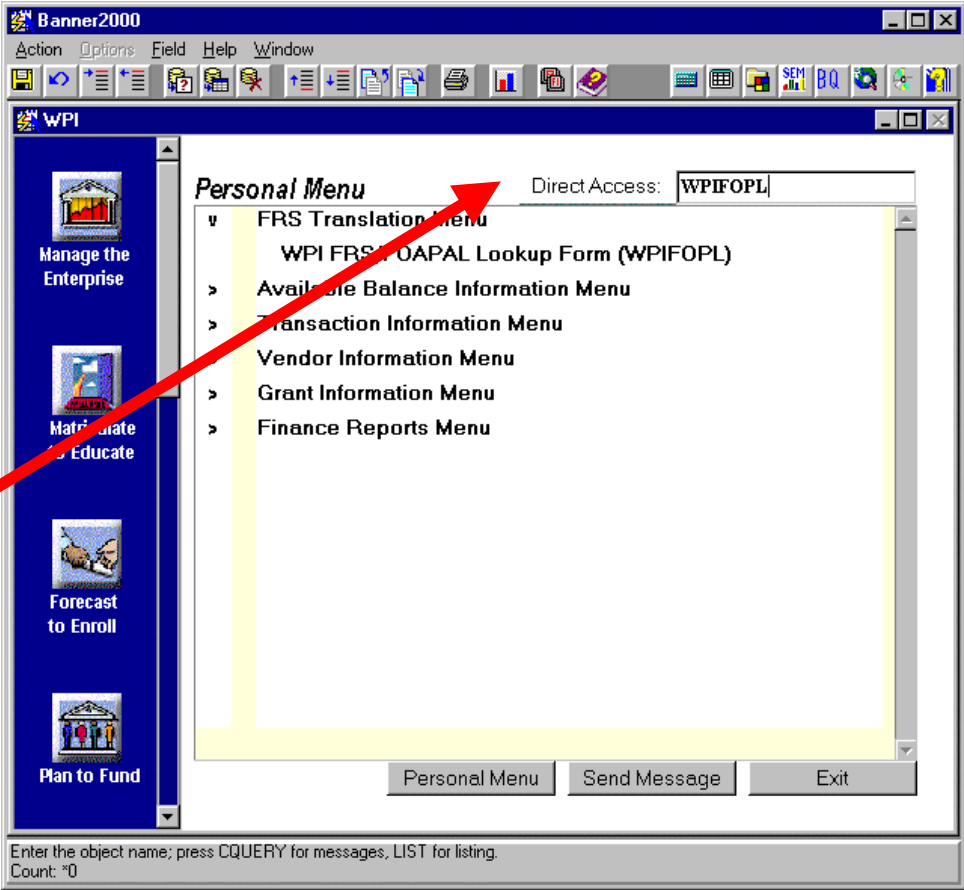
Acct	Title	Adj Budget	YTD Activity	Commitments	Avail Bal
7111	Supplies	40000.00	55829.80	0.00	-15829.80
7113	Participants S	10000.00	-23350.00	0.00	33350.00
7181	Lab & Instruct	7500.00	100.00	0.00	7400.00
7311	Travel Expense	10000.00	6458.16	0.00	3541.84
7711	Investment Man	7500.00	975.00	0.00	6525.00
Total:		75000.00	40012.96	0.00	34987.04

DIRECT ACCESS

In addition to using the **Personal Menu**, you can also access forms using the “**Direct Access**” method.

Enter the **form code** (i.e. **WPIFOPL**) in the box labeled “Direct Access” (text will automatically appear capitalized), after typing press the **ENTER** key on your keyboard.

You do not have to be on a specific menu to use the Direct Access method. I.e. a user could be in the Alumni Development module, and wish to bring up a Finance module form. Simply enter the Direct Access code and press the ENTER key.



## Using the Menus





To access a Banner menu, click the menu item. A drop-down menu will appear. Select (click) the menu item.

For example, to perform a  **NEXT BLOCK**, you can click on the word “Block” in the menu bar, then click “Next” in the drop down menu.

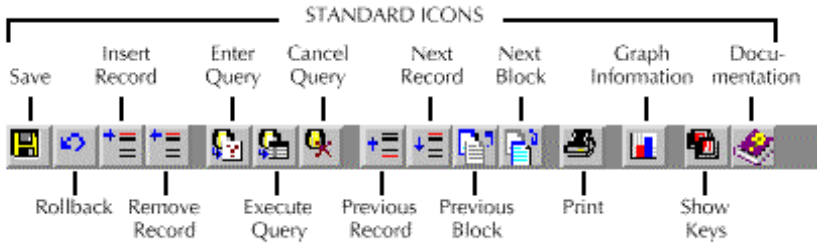
## Using the Toolbar Buttons



You can perform functions using your toolbar. Place your mouse over a toolbar button. A “tooltip” should pop up telling you what the button name is. Click the button to perform the function. For

example, to perform a  **NEXT BLOCK** click the  button. Below is a diagram of the buttons and their function names:

**Menu** Direct Access:  
**3 Translation Menu**  
**/PI FRS/FOAPAL Lookup Form (WPI**  
**ilable Balance Information Menu**



1


<sup>1</sup> From On-Line Banner Documentation, Ch. 2 Using Banner 2000, pg. 31

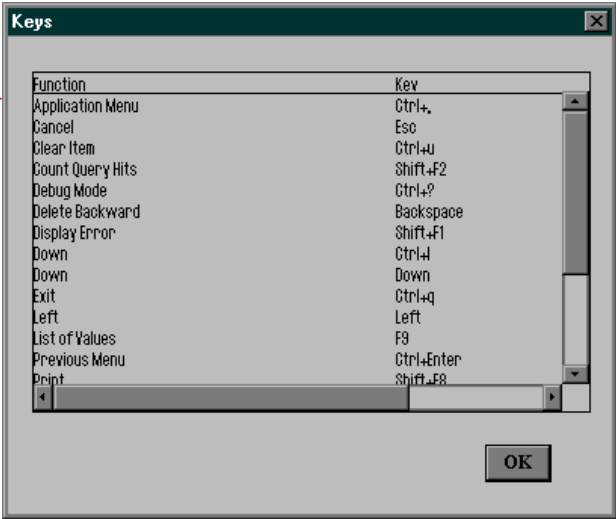
# Using the Keyboard

You can also perform functions with your keyboard as well.

For example, if you wish to perform

 **NEXT BLOCK**, you can press the **CTRL+PAGE DOWN** keys simultaneously.

For a listing of the key combinations, click the  **SHOW KEYS** button while you are in a form.



## Scrolling in a Form

Occasionally, more information will be available in a windowpane than can fit. In this case, a scrollbar may appear in order to scroll throughout the form. To scroll, place the mouse over the scrollbar:

The screenshot shows the Banner2000 interface with the 'Detail Transaction Activity Form (FGITRND 3.1)(Upgrd)' window. The window contains a table of transactions and a scrollbar on the right side. A red arrow points to the vertical scrollbar, and another red arrow points to the horizontal scrollbar at the bottom of the table.

COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Prd	Q	Cmt
1	98		11001	8100	7111	410				\$	
Acct	Orgn	Prog	Date	Type	Document	Fld	Amount	D/C			
7111	8100	410	05-JUN-1998	BD01	J0000354	UBD	20000.00	+			
7111	8100	410	27-MAY-1998	INNI	I0000174	YTD	6.26	+			
7111	8100	410	14-MAY-1998	INNI	I0000172	YTD	150.00	+			
7111	8100	410	14-MAY-1998	INNI	I0000173	YTD	25000.00	+			
7111	8100	410	14-MAY-1998	INNI	I0000173	YTD	25000.00	+			
7111	8100	410	14-MAY-1998	INNI	I0000172	YTD	150.00	+			
7111	8100	410	14-MAY-1998	INNI	I0000169	YTD	500.00	+			
7111	8100	410	13-MAY-1998	INNI	I0000169	YTD	500.00	+			
7111	8100	410	12-MAY-1998	DCSR	H0000000	YTD	-75.00	-			
7111	8100	410	12-MAY-1998	JE16	J0000281	YTD	500.00	+			
Total:							71731.26	+			

Buttons: Total, Document Query, Encumbrance Detail, Rollback, Exit

Press Key Dup Item for document query forms; Count Query for encumbrance detail  
Count: 10 v

Click the down or up arrow to scroll vertically

Click the left or right arrow to scroll horizontally

## Querying

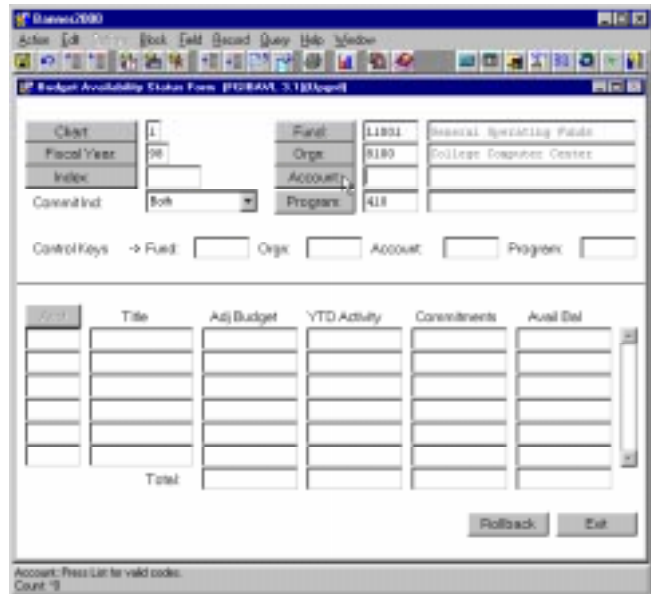
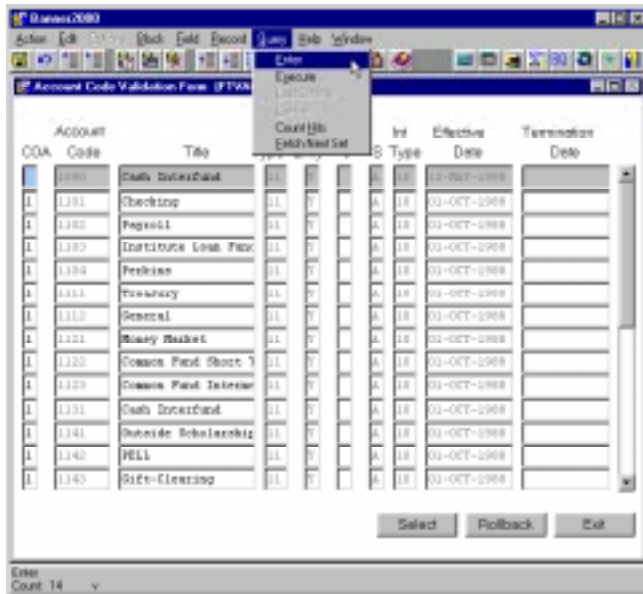
You can ask a question --or query-- many of the forms to find information in Banner.

Before you perform a query, it is important to know how to formulate the query. There are several rules:

- Queries are literal and the system is case sensitive (use of upper and lower case letters)
- The percent sign (%) stands for any amount of characters
- The underline (\_) stands for one (1) occurrence of a character
- Both the % and \_ signs are called *wildcards*

<b>Enter this query:</b>	<b>To get these results:</b>
%1A%	All entries that contain the characters 1A
1A%	All entries that begin with the characters 1A
%1A	All entries that end with the characters 1A
_1A%	All entries that have 1A as the second and third characters

1. For example, in the **Budget Availability Status Form (FGIBAVL)** if you want to query to find a specific account, Click the **Account** **LOV** button (**List of Values**)

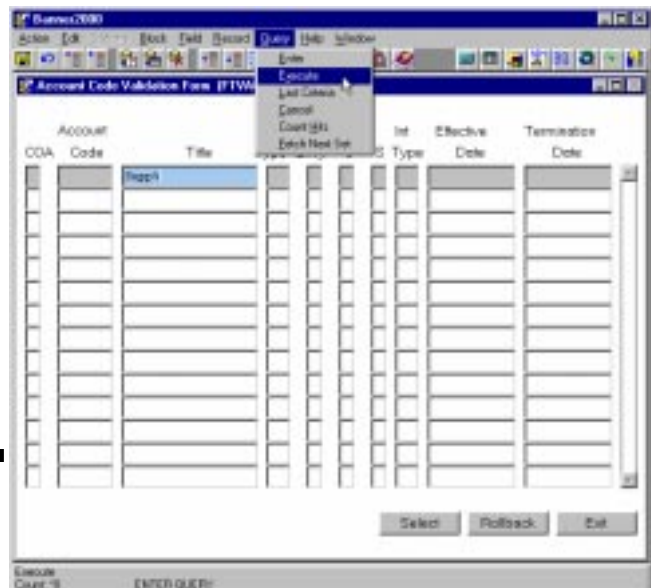


2.  **ENTER QUERY**

3. Enter the text **Supp%** in the Title field

4.  **EXECUTE QUERY**

04/02/99





# Changing Your Password

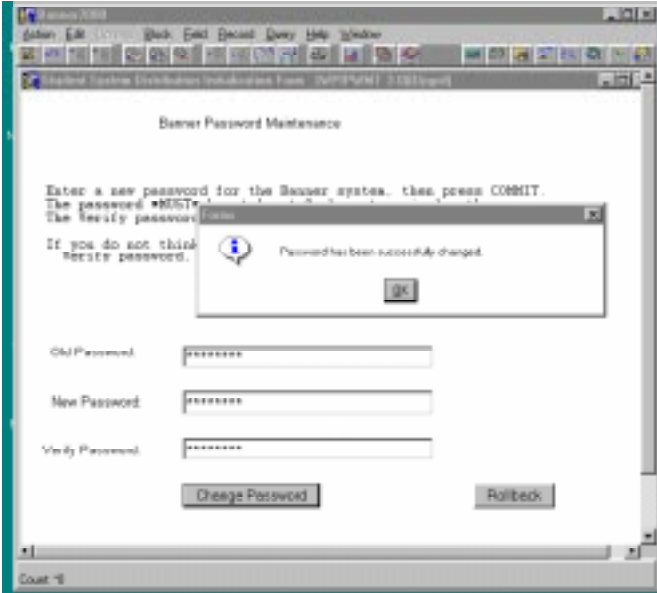
You will be prompted every sixty (60) days to change your password. Passwords MUST be at least eight (8) characters in length and are not case-sensitive (use of upper and lower case letters).

- 1. Enter your old password
- 2. Enter the new password
- 3. Enter the new password again to verify
- 4. Click the **Change Password** button to complete the password change.



You will be

prompted with a message indicating that your password has been successfully changed.



**Logging Out of (Exiting) Banner**

To exit Banner, click on the **Exit** button. You will be prompted with a message asking “Do you really wish to quit?”, click the **Yes** button. Banner will close, and you will be returned to the desktop.

