Banner Finance Overview

October, 2012

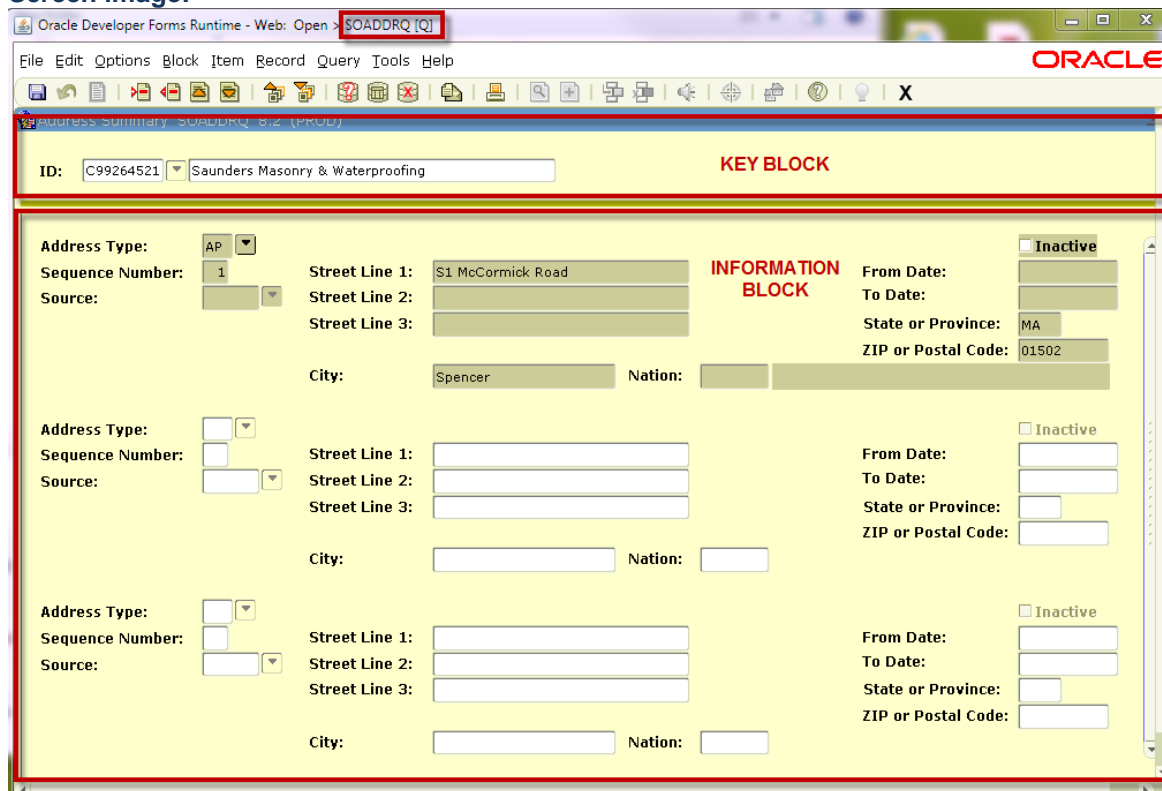## Navigating in Banner INB (Login at admin.wpi.edu and select Banner Production Forms INB)

Introduction:

All Banner forms are made up of three components: Records, Fields, and Blocks. A block is a section of a screen that contains related information. Each block may be enclosed in a box.

Blocks:

☐ Group information

☐ Can be one or more on a screen

☐ Think of these as "sections" on a form

Screen image:

Navigating blocks

To navigate between blocks, use the Block-Next or Block-Previous functions. These icons are located on the toolbar in the form. If you prefer to use keystrokes for navigation, you can use Ctrl-Page Down to reach the Next Block or Ctrl-Page Up for the Previous Block.

Next Block   Previous Block

Searching the Database for Vendor Addresses – SOADDRQ

SOADDRQ will allow you to search for a vendor and display the address(es) associated with the vendor.

1. You may enter a partial name with a wildcard (%) or the entire vendor name in the field next to the ID field. Press enter.

   Example: Search %Saunders%

2. If more than one vendor matches the search criteria, a box titled ID and Name Extended Search will appear. Click on the down arrow next to the Results field. The list of vendors meeting the criteria will appear.

3. Scroll through the names and double click to select the vendor you are searching for. The ID number and name will default into the header block.

4. Next Block to move from the 1st block into the 2nd block. The addresses for the entity will appear.

5. For vendor addresses, use Address Type of AP. Vendors may have multiple AP addresses. Each address within an address type is assigned a sequence number. If an address is inactive, the inactive indicator in the upper right side of the vendor address will be checked.

6. Select Rollback ⟲ to return to the key block and repeat the process for additional vendor searches.

Wildcards

Searching for items in a database

A wildcard is a special character that represents one or more other characters. Use wildcard symbols % and _ in the search criteria.

- % (percent sign) represents any number of characters

- _ (underscore) represents one occurrence of a character

Note: ma is used as an example. The wildcard symbols can be used with any combination of latter in any order.

To get these results...	Enter these criteria...
All entries that contain ma	%ma%
All entries that begin with ma	ma%
All entries that end with ma	%ma
All entries that have m as a second character	_m%