Finance
Basic Banner Finance
Training Objectives

- Requesting & gaining access to Banner Admin and Banner Self-Serve
- Developing basic Banner navigation skills
- Becoming familiar with basic Banner terms
- Understanding the elements of a Banner inquiry form
- Learning some basic Banner query techniques
- Understanding the Banner form naming rules
- Banner Shortcuts
Gaining Access to Banner

- Individuals needing access must first complete FERPA training at:
  - https://my.suu.edu/ferpa

- Supervisor initiates request using button located at https://my.suu.edu/it/banner and following prompts

- Be sure to include:
  - T Number of employee needing access.
  - Copy from user (copies access from job predecessor if applicable)
  - Security Group: GENERAL Finance Account (for finance access)
  - Funds and Orgs you will need access to (if not copied from predecessor)
Banner Self Serve

- Banner Self Serve gives a limited, summarized view of financial information
- Is used primarily for purchase requisition submissions / approvals
- Select ‘Finance Menu’ under Banner heading on my.suu.edu portal
The information available in Banner Self Serve will be covered in the Banner Self Serve and Purchasing training.
Logging into Banner Admin

- Log into your [my.suu.edu](http://my.suu.edu) portal
- Scroll down under and under the Banner heading click on
- From the Banner Links page click on Banner Admin.
Banner Admin

- Banner Admin is the University's financial reporting system

- Menu to Banner Apps, MyBanner, Help, Recent Forms, and Search Menus

- The Welcome screen allows to search form code or form name
  - A Banner form is a view of information
  - Each form has a 7 digit code
**Banner Form Display, Navigation & Tools**

- **Title & Tool Bar**
- **Close Form**
- **Key Block - Lists financial area (FOAP) form is displaying below**
- **Records Display – Lists information based on Key Block input above.**
- **Previous/Next Block**
- **Go / Start Over**
- **Save**

### Financial Area (FOAP) Form Display

<table>
<thead>
<tr>
<th>Account</th>
<th>Type</th>
<th>Description</th>
<th>FYO/Activity</th>
<th>YTD Activity</th>
<th>Commitments</th>
<th>Account Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>6110</td>
<td>L</td>
<td>Faculty Salaries</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
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<tr>
<td>6120</td>
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<td>Administrative Faculty</td>
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<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
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<tr>
<td>6150</td>
<td>L</td>
<td>Overseas Teaching</td>
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<td>0.0</td>
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<td>0.0</td>
</tr>
<tr>
<td>6180</td>
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<td>Professional Staff</td>
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<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>6190</td>
<td>L</td>
<td>Wages</td>
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</tr>
<tr>
<td>6210</td>
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<td>Health Insurance</td>
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<tr>
<td>6230</td>
<td>L</td>
<td>Dental Insurance</td>
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<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>6330</td>
<td>L</td>
<td>Life Insurance</td>
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<tr>
<td>6340</td>
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<tr>
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<td>TIAA-CREF</td>
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<tr>
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<td>Current Expense</td>
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</tr>
<tr>
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<td>Supplies - Office</td>
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<td>0.0</td>
<td>0.0</td>
</tr>
</tbody>
</table>

**Not Total**: 0.0

**Total**: -14,523.67

**Record 3 of 16**
Banner Buttons & Tools

- Executes search of key block input parameters to display.
- Returns to key block for search parameter adjustment
- Navigate between blocks of information on a form. This will not navigate to the initial key block.
- Displays related banner information of a given form selection.
- Displays tools to print, export to excel, clear records, etc.
- F7 - Enters Query mode and allows you to enter search parameters within that form.
- F8 – From Query mode queries data based on form parameters
Banner Query Mode

- Query mode is initiated when navigating within a form’s record field and pressing F7.
- Most banner fields can be queried and will vary by form.
- Select field(s) to be queried from dropdown menu. Adding additional fields will narrow search.
- Select a Query Operator for each field to be queried.
- Press F8 or ‘go’ to execute query and display records.
- Example Shows a FGITRND query of CTLR (000100-66000-60) for all year to date non-payroll expenses
The Object Module (Position 2) and Type of Object (Position 3) are different for each Primary System.
Banner Shortcut Keys

- Alt + Page Down – Next Section
- Alt + Page Up – Previous Section
- F5 – Start Over
- F6 – Insert New Record
- F7 – Enter Query
- F8 – Execute Query
- F9 – List of Values
- F10 – Save
- Shift + F1 – Export

- Shift + F4 – Clear One Record
- Shift + F6 – Delete Record
- Ctrl + P - Print
- Ctrl + Q – Cancel Form/Query/Exit
- Ctrl + Y – Recently Opened Forms
- Alt+Shift+R – Open Related Menu
- Alt+Shift+T – Open Tools Menu
- Esc – Cancel Action