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Banner Finance Self-Service  
Handbook

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## Banner Finance Self-Service overview

This section contains information about Banner Banner Finance Self-Service.

The Banner Banner Finance Self-Service application enables your installation to deliver optimal customer service using the convenience, speed, and technology of the internet. The application gives users simplified access to information in your Banner Finance system.

This handbook contains information about the *My Finance Query* and *My Requisitions* modules of the Banner Finance Self-Service application.

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## My Finance Query overview

This section contains information about the My Finance Query application.

My Finance Query allows you to query and view your Finance budget data.

You can use this application for the following:

- Create a query to retrieve Finance budget data
- Edit a query
- Share a query with others in your organization having the same level of access
- Delete a query
- Mark a query as a favorite
- Perform comparison queries
- Add computed columns to queries
- Download query results to Excel
- View Document.
- View related documents
- View approval history

## My Finance Query views

Queries have several views available.

Status	Description
Favorite Queries	Queries previously saved as ones you typically view often.
Saved Queries	Queries saved for future viewing.
Shared Queries	Queries designated as shared, allowing anyone in your organization who has the same level of access to see the query.

## My Finance Query Pages

This section describes the My Finance Query Dashboard page and query statuses.


### My Finance Query page

The My Finance Query page lists your budget query history including query favorites, saved queries, and shared queries.

The My Finance Query page serves as your home page. Use this page to create budget queries and review budget queries you have designated as favorites, saved, or shared with others.

You can also use the **Search Query** field to search for queries by supplying the full/partial name of the query. The Search Query feature can also be used in combination with the Filter functionality. This feature works on all the three tabs in the dashboard – Favorite Queries, Saved Queries, and Shared Queries.

#### Filtering queries

Click  to filter queries. You can filter queries by type:

- Budget
- Encumbrance
- Multi Year
- Payroll

You can also use the Low-High, High-Low arrows to filter queries based on budget size.

## My Finance Query tasks

This section contains the tasks you can perform using My Finance Query.

### Create a query

To begin the query process, use the My Finance Query page to create a query.

#### Before you begin

You can create the following types of budget queries:

Query Type	Description
Budget Status by Account	<p>Budget information by accounts for the Fiscal Period, Year, and Commitment Type (all, committed, or uncommitted) by the following:</p> <ul style="list-style-type: none"> <li>• FOAPAL/Index values.</li> <li>• Single Organization.</li> <li>• Fund Type.</li> <li>• Account Type.</li> <li>• Revenue Accounts.</li> <li>• Wild-card filters supported for FOAPAL</li> </ul>
Budget Status by Organizational Hierarchy	<p>Budget information for organizations by the following:</p> <ul style="list-style-type: none"> <li>• Hierarchical structure.</li> <li>• Specific Funds, high-level Organizations, Accounts, and Programs.</li> <li>• Fund Type.</li> <li>• Account Type.</li> <li>• Revenue Accounts.</li> <li>• Wild-card filters supported for FOAPAL.</li> </ul>
Budget Quick Query	<p>Current budget status and displays information similar to that available on the Organization Budget Status Form (FGIBDST). When you choose this option, be aware of the following:</p> <ul style="list-style-type: none"> <li>• Only one parameter page displays for this query. Ledger fields displayed include</li> </ul>

Query Type	Description
	Adjusted Balance, Year to Date, Net Commitments, and Available Balance. <ul style="list-style-type: none"> <li>• Wild-card filters supported for FOAPAL.</li> <li>• You can enter the fiscal year. Data displayed will be through period 14.</li> </ul>
Encumbrance Query	Budget information by encumbrance information for the Commitment Type (all, committed, or uncommitted), Encumbrance Status, and Fiscal Year and Period.
Multi Year Query	New Query type to support the current budget status by Grant which displays information similar to that available on the Grant Inception to Date (FRIGITD) in the admin application. Wild-card filters supported for FOAPAL.
Payroll Expense Detail	Allows you to review the entire payroll distribution data for the Fiscal year and Fiscal period by: <ul style="list-style-type: none"> <li>• FOAPAL/Index values.</li> <li>• Single Organization.</li> <li>• Fund Type.</li> <li>• Account Type.</li> <li>• Wild-card filters supported for FOAPAL.</li> </ul>

### Procedure

1. On the **My Finance Query** page, click **New Query**.
2. On the **Create New Query** window, in the **Select Query Type** field, select the budget query type.
3. In the **Values** area, select the values and the Operating Ledger columns for which you want to query.
4. Click **SUBMIT**.

The My Finance Query page appears with query results. Using the available icon buttons, you can edit, share, save, view query parameters, add computed columns, download results to Excel, or view available balance, pending documents, and payroll (if applicable).





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## Save a query and mark it as a Favorite

You can save a query and mark it as a favorite.

### Procedure


1. Create a query that you want to save.  
The My Finance Query page appears with query results.
2. Click  to access the **Save as** window.
3. Enter a query name in the provided field.
4. If you want to set the query as a Favorite, click the **Set as favorite** check box.
5. Click **Save**.

**Tip:** You can also use the  icon of a query displayed in the card view to toggle a query between Favorite and Unfavorite.

## Edit a query

You can edit a query to adjust results.

### Procedure

1. On the **My Finance Query** dashboard page, click the Saved or Shared query you want to edit.
  - Clicking saved queries loads query results. Click  to access the **Edit Query** window.
  - Clicking a shared query in the query list accesses the **Edit Query** window.
2. Using the **Edit Query** window, adjust the selections for the query.
3. Click **SUBMIT**.  
The **My Finance Query** page appears with query results.


## View available balance, pending documents, and payroll expense detail

You can view pending documents attached to a query. You can also view payroll expense detail.

### Before you begin

**Note:** Payroll expense detail is available to users based on permission level access.

**Procedure**


1. View the query.
2. Click  to access the options list.

Option	Description
View available balance	The system presents with Available Balance information (similar to FGIBAVL in Admin) based on the query parameters and the Budget Control Keys configured.
View pending documents	The system presents a list of pending documents associated with the query.
View payroll	The system presents payroll information, based on your permission level.

## Share a query

Sharing a query allows anyone in your organization who has the same level of access to see the query.

**Procedure**

1. On the **My Finance Query** dashboard page, locate the query you want to share in the Favorites or Saved areas.
2. Click .
3. On the share prompt, choose the appropriate option.

Option	Description
Yes	The system updates the query to Shared allowing others with the same level of access to see the query.
No	The system cancels the share.

You will now see  which indicates that the query has been shared.


4. You can click on  to unshare the query.

**Tip:** You can also perform the Share/UnShare operation, while running a query from the Query results listing page.

## Download a query to Excel

You can download a query as an Excel spreadsheet.


### Procedure

1. Create or view a query that you want to download.
2. Click  to download the query to the default download location on your local drive.

## Delete a query

You can delete saved queries.

### Procedure

1. On the **My Finance Query** dashboard page, click **Saved Queries**.
2. Locate the saved query you want to delete and click .
3. On the delete prompt, choose the appropriate option.

Option	Description
Yes	The system deletes the query
No	The system cancels the delete.


## Add computed column

You can add a computed column to query results.

### About this task

**Note:** You can add a computed column to all query types except Budget Quick Query.

### Procedure

1. Create or view the query to which you want to add a computed column.
2. Click  to access the **Computed Columns** window.
3. Define the computed column by naming it and selecting the two columns and the operator controlling the new column's results.
4. Click **Compute**.

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Query results reload listing the new computed column in the results.


### What to do next

**Tip:** You can use the **Remove** tab to remove a previously added computed column from a query.

## View a document – option 1

You can use these steps to view a document from the **My Finance Query** dashboard.

### Procedure

1. Click  on the dashboard.
2. Use the **Document Type** drop down field to select the appropriate document type.
3. Use the **Document Search** to look up a document.  
-OR-  
Type the document number directly into the **Document Number\*** field.
4. Click **View Document** to open the document as a PDF.


**Note:** You can use the **Approvals & Related Documents** option to view the approval information and related documents.

## View a document – option 2

You can use these steps to view a document from the **Query Results** page in drill-down view.

### Procedure

1. Drill down to the query that you want to view the transaction details for.  
For example: **My Finance Query > Multi Year** query.
2. On the **Query Results** page, drill down further by clicking on a budget figure against the query.  
For example: **\$40,000.00**  
This will open the budget transaction details for that query.
3. Click **Document Code** to open the details as a PDF.

**Note:** You can click the **View Parameters** information icon  to view the approval information and related documents.

## Using Extensibility in My Finance Query

You can hide optional page elements or change elements field labels using the Extensibility tool set delivered with the application.


### About this task

Use the **Extension Editor**, accessed in My Finance Query Tools menu, to configure which elements you want to modify. When the extensions are edited and saved, this configuration is applied uniformly across your site's My Finance Query implementation.

**Note:** Only users who have a Web Tailor admin role can use the Extension Editor. For more information about this role, refer to the Finance Web app extensibility section in the *Banner Finance Self-Service Installation Guide 9.1*.

**Note:** Several `.json` files are included with this PDF. Click the **Attachments** icon to access the files.

### Procedure

1. Log into My Finance Query using the Web Tailor Admin role.
2. Click Tools  and select **Extensibility > Edit Extensions**.  
The **Extension Editor** window appears.
3. For the element for which you want to change the label, modify the label in the corresponding JSON code in the **Extension Editor** window as shown in the following examples:  
If you want to change the label from `Organization` to `Department`, the following JSON code portion in the Requisition Comments must be modified from `{"label": "Organization"}` to `{"label": "Department"}`.
4. Use the `exclude` value to specify that an element be displayed or hidden.
  - `"exclude":true` = hides the element
  - `"exclude":false` = element is displayed
5. Based on the needs of your institution, use the JSON files supplied for the Individual Query Types or the consolidated one which contains all possible extensible elements in My Finance Query. Please make sure after modifications the JSON supplied is a valid one by verifying against any of the available JSON validators. For example:
  - <http://jsonlint.com/>
  - <https://jsonformatter.curiousconcept.com/>

Query Type	Use JSON Code File
My Finance Query	MyFinanceQuery.json
My Requisition	MyRequisition.json

## My Requisitions Overview

My Requisitions allows you to create and submit a purchase requisition. You can create a purchase requisition using either document-level or commodity-level accounting.

You can also use this application for the following:

- Save requisition as a draft (Draft status)
- Edit a draft requisition and submit a draft requisition
- Delete a draft requisition
- View requisition status
- Copy a completed requisition
- Add comments (public and private)
- Add and delete attachments using Banner Document Management
- Recall your requisition from Banner Finance approvals
- Search and filter requisitions you have created
- Order returned search data
- View a requisition as a PDF

## My Requisitions concepts

Several concepts are important to understand before using My Requisitions.

### My Requisitions status

A status indicates the state of a purchase requisition.

Status	Description
Draft	Requisition previously saved as a draft and awaiting final submission. You can edit and submit.
Pending	Requisition is pending approval in one of the Banner Finance approval queues.
Disapproved	Requisition submitted but disapproved by a Banner Finance approver. The approver can provide Disapproval Text explaining why the requisition was disapproved. You can edit disapproved requisitions and resubmit them.

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Status	Description
Completed	<ul style="list-style-type: none"><li>• Completed = Requisition approved and posted.</li><li>• Converted to PO = Requisition items have been converted to Purchase Orders .</li><li>• Assigned to Buyer = Requisition assigned a buyer code, making the buyer responsible for it.</li></ul>

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## My Requisitions Pages

This section describes the My Requisitions pages and the tasks you can perform using these pages.

### My Requisitions page

The **My Requisitions** page serves as the home page. Use this page to create requisitions and view requisitions you have created.

My Requisitions are separated into three sections:

- Draft Requisitions
- Pending Requisitions
- Completed Requisitions

Requisitions appear in each section if available. The number of requisitions in each section is listed after the section's title. By default, only two requisitions are listed when a section contains more than two.

Clicking the information icon next to a requisition's status provides a summary window of information for the requisition. This window can also contain comments. For example, if a requisition is disapproved, the user who disapproved it can add a comment explaining why the requisition is disapproved.

Click a requisition's current status button in the Status column to view the requisition's detailed information.

### Requester Information page

The **Requester Information** page allows you to specify who is creating the requisition.

For user convenience, field information on this page is already completed and defaults from the requester's Banner Finance User Profile (FOMPROF).

You can accept the default values provided or select alternate values if needed. You can provide an explanation or justification for the requisition by adding comments or an attachment.

Also, you have the option to select the requisition's accounting type (Document or Commodity), if that option for user choice has been configured when the application was deployed.



## Vendor Information page

In the **Vendor Information** page, you define the vendor for the purchase requisition.

Selecting a vendor is optional. You can select the **Choose vendor for me** check box to let your Procurement Office select the vendor.

The page also contains fields defining the default discount terms and the vendor's base currency.

## Add Item & Accounting page

This page allows you to add items and accounting distributions to the requisition.

Page fields enable you to provide and select the data for the accounting distributions (budget line items) to which the request cost will be charged. The application supports document or commodity level accounting. You can also update or delete the accounting distribution.

## Commodity information

This page contains the requisition's descriptive information about the goods and services requested.

Page fields include information about the unit of measure, quantity, unit price, and any additional costs, such as shipping and handling. You can add comments for each commodity item, or update or delete the commodity item. You can select a commodity code/description from the lookup or enter commodity information not available in the lookup. You can also update the Tax and Discount fields.

## Attachments page

This page contains a list of the requisition's attachments.

You can add, delete, and view attachments. When viewing any attachment, you can see the document stored in the B-F-DOCS application in Banner Document Management.

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## My Requisitions tasks

This section contains the tasks you can perform using My Requisitions.

### Create a requisition

To begin the purchase process, use the My Requisitions dashboard page to create a purchase requisition.

#### Procedure

1. On the **My Requisitions** dashboard page, click **Create Requisition**.
2. On the **Requestor Information** page, specify who is requesting the purchase using the available fields if you are not the default requester for the account. Click **Next** to continue to the next page.
3. On the **Vendor Information** page, select the vendor for the requisition.  
By default, the **Choose vendor for me** check box is selected. When selected, the system chooses a vendor for you. Clear the check box if you want to select the vendor.
4. On the **Add Item & Accounting** page, add an item using the **Add Item(s)** field.  
After an item is selected, the page updates with required fields for the selected item.
5. Click **Save**.  
The page refreshes with the item you just added listed below the **Add Item(s)** field in the **Commodities** list. You can click any item in the list to view its details.
6. Repeat steps 4 and 5 as necessary to add additional items to the requisition.
7. Click **Add Accounting**.  
The page refreshes with the required fields for accounting information.
8. Click **Save**.  
The Requisition Summary updates.
9. Click **Save as draft** if you want to return to the requisition before submitting or **Submit Requisition** to send the requisition for approval.

### Copy a requisition

You can copy a completed requisition and use it as a template for a new requisition.

#### Procedure

1. On the **My Requisitions** dashboard page, click the completed requisition you want to copy.  
The requisition opens on the **Requestor Information** page.

2. Click **Copy Requisition**.
3. On the copy prompt, choose the appropriate option.

Option	Description
Yes	The system copies the requisition and creates an identical new requisition that you can edit.
No	The system cancels the copy.

4. Edit the requisition as appropriate, just as you would a new requisition.

## Delete a requisition

You can delete any requisition that is in Draft status.

### Procedure

1. On the **My Requisitions** dashboard page, click the requisition in Draft status you want to delete.  
The requisition opens on the **Requestor Information** page.
2. Click **Delete Requisition**.
3. On the delete prompt, choose the appropriate option.

Option	Description
Yes	The system deletes the requisition.
No	The system cancels the delete.

## Edit a requisition

You can edit requisitions in Draft status. To edit a requisition in Pending status, you must recall the requisition.

### Procedure

1. On the **My Requisitions** dashboard page, click **Draft** in the Status column for the requisition that you want to edit.
2. Using the **Next** and **Back** buttons, edit the Requestor Information, Vendor Information, and Add Item & Accounting pages as necessary.
3. Click **Save as draft** if you want to return to the requisition before submitting or **Submit Requisition** to send the requisition for approval.

## Add an attachment to a requisition

After an attachment is created, such as a statement of work, you can add an attachment to the requisition at any time before submitting the requisition. You can add attachments to requisitions in Draft or Disapproved status.

### Procedure

1. Open the requisition in Draft or Disapproved status to which you want to add an attachment.
2. Click **Attachments**.
3. Click **Attach File**.
4. Using the **Attach Documents** prompt, choose a file to attach.
5. Select the **Document Type**.
6. Click **Upload**.

The file is added to the Attachments page list.

## Delete an attachment from a requisition

If you want to delete an attachment from a purchase requisition, you can use the Attachments page to delete one or more attachments.

### Procedure

1. Open the requisition containing the attachment you want to delete.
2. Click **Attachments**.
3. On the **Attachments** page, click the attachment that you want to delete in the Attachments list, and then click **Delete**.
4. Confirm that you want to delete the attachment.

## Recall a requisition

You can recall requisitions that are in Pending status.

### Procedure

1. On the **My Requisitions** dashboard page, open the pending requisition that you want to recall.
2. Click **Recall My Requisition**.
3. On the recall prompt, choose the appropriate option.

Option	Description
Yes	The system recalls the requisition. The My Requisitions Dashboard page loads with the recalled requisition placed in the draft requisitions section with a draft status
No	The system cancels the recall.

## View as PDF

You can download the purchase requisition as a PDF file to verify requisition information is correct.

### Procedure

1. Open the requisition that you want to view as a PDF.
2. Click **View as PDF**.  
My Requisitions formats the requisition's information into PDF format.
3. Right-click in the PDF file for other options, such as printing or saving the requisition.

## Using Extensibility in My Requisition

You can hide optional page elements or change elements field labels using the Extensibility tool set delivered with the application.


### About this task

Use the Extension Editor, accessed in My Requisition Tools menu, to configure which elements you want to modify. When the extensions are edited and saved, this configuration is applied uniformly across your site's My Requisition implementation.

**Note:** Only users who have a Web Tailor admin role can use the Extension Editor. For more information about this role, refer to the Finance Web app extensibility section in the *Banner Finance Self-Service Installation Guide 9.1*.

**Note:** Several .json files are included with this PDF. Click the Attachments icon to access the files.

### Procedure

1. Log into My Requisition using the Web Tailor Admin role.
2. Click Tools  and select **Extensibility >Edit Extensions**.  
The **Extension Editor** window appears.

3. For the element for which you want to change the label, modify the label in the corresponding JSON code in the Extension Editor window as shown in the following examples:  
If you want to change the label from “Public Comment” to “Printable Comment,” the following JSON Code must be modified from `{"label": "Public Comment"}` to `{"label": "Printable Comment"}`.
4. Use the "exclude" value to specify that an element be displayed or hidden.
  - "exclude":true = hides the element
  - "exclude":false = element is displayed
5. Based on the needs of your institution, you can mix and match sections of the JSON code contained in the provided *MyRequisition.json* file. Please make sure after modifications the JSON supplied is a valid one by verifying against any of the available JSON validators. For example:
6. Click Submit to save the extension. A notification center message appears verifying your save. Refresh the page to verify your changes were made.

## Keyboard shortcuts

The following tables list the keyboard shortcuts for the My Finance and the My Finance Query modules.

### My Finance

The following table lists the keyboard shortcuts that you can use to navigate through the modules of My Finance.

Action	Key option 1	Key option 2 (if any)
Notifications	<b><u>Alt + N</u></b>	
Right menu	<b><u>Alt + M</u></b>	
Avatar/Profile menu	<b><u>Alt + P</u></b>	
Navigate to the Home page	<b><u>Shift + Home</u></b>	<b><u>Ctrl + Home</u></b>
Tools/Options menu	<b><u>Alt + L</u></b>	
Sign out	<b><u>Ctrl + Shift + F</u></b>	
Open date picker	<b><u>F9</u></b>	<b><u>Fn + F9 (Mac)</u></b>

### My Finance Query

The following table lists the keyboard shortcuts that you can use in the My Finance Query module.

Action	Key option 1	Key option 2 (if any)
Create new query	<b><u>F7</u></b>	
Submit	<b><u>F8</u></b>	
Edit query	<b><u>F9</u></b>	<b><u>Alt + B</u></b>
Save	<b><u>F10</u></b>	
Filter	<b><u>Shift + F4</u></b>	
View document	<b><u>Alt + R</u></b>	<b><u>Alt + U</u></b>
Close popup	<b><u>Ctrl + Q</u></b>	
Low/High sort	<b><u>Alt + Up/Down arrow</u></b>	

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Action	Key option 1	Key option 2 (if any)
View query parameter	<b>Ctrl + I</b>	<b>Ctrl + M</b>
Share	<b>Alt + S</b>	<b>Alt + N</b>
Calculate	<b>F6</b>	
Download	<b>Shift + F1</b>	<b>Shift + F2</b>
Footer expand/collapse	<b>Alt + Down arrow</b>	
Back	<b>Alt + Left arrow</b>	

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