

BANNER FINANCE

TRAINING GUIDE

FOR

FIRST TIME USERS:

LOGGING ON AND

GENERAL BUDGET INQUIRY

Revised: June 1, 2009

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INTRODUCTION

Welcome to Banner Finance. The Finance modules found within Banner contain detailed information about expenditures and charges that post against an individual budget. Banner uses an accounting string called “FOAPAL” for assigning costs to its proper organizational unit. This acronym stands for:

- F Fund – required for financial transactions - six characters – alpha numeric
- O Organization – required for financial transactions - four characters – alpha numeric
- A Account – required for financial transactions - five characters – alpha numeric
- P Program – required for financial transactions - three characters – alpha numeric
- A Activity – optional for financial transactions - four characters – alpha numeric
- L Location - optional for financial transactions - six characters – alpha numeric

Every financial transaction in Banner requires at least the F (Fund), O (Organization), A (Account) and P (Program). The Activity code will only be used by certain departments. You will not have a value for this field unless the Accounting Department specifically notifies you. The Location Code identifies where items such as equipment, vehicles, etc are located and will be used only by the accounting staff.

If you have an FRS account that begins with 11, 12, 13, 14, 15, 16, 17 or 18, your Org code will specify your department and your fund code will always be 111020. When preparing financial transactions for these accounts, your Org code will be the unique code which identifies your department. The translation from the FRS account to the Banner FOAPAL is as follows:

Old FRS Account	120200		
Banner Account	Fund 111020 (six digits)	Org 6040 (four digits) (denotes department)	Program 600 (three digits) (expense category)

FRS Accounts that begin with 19 will always have a fund code of 12X030. When preparing financial transactions for these accounts, your Org code will be the unique code which identifies your department. The Banner FOAPAL translates from the FRS account structure for FRS accounts that begin with 19 as follows:

Old FRS Account	191000		
Banner Account	Fund 12X030 (six digits)	Org 1515 (four digits) (denotes department)	Program 500 (three digits) (expense category)

FRS ledger 2 accounts will carry their departmental org code, but will have a unique fund code that begins with 14XXXX. When preparing financial transactions for these accounts, your Fund code will be the unique code which identifies your department. So, ledger 2 accounts will translate as follows:

Old FRS Account 211101

	Fund	Org	Program
Banner Account	142420	1515	300
	(six digits)	(four digits)	(three digits)
		(denotes department)	(expense category)

FRS ledger 5 accounts (grant accounts) will have a unique departmental org code with the first digit being a 9 and a fund code that begins with 3. Grant accounts also have a unique grant code associated with them. The grant code provides accounting information on an inception to date basis – using this feature will allow you to access information on your grant account since it was established. When preparing financial transactions for grant accounts, your Fund code and Grant code will be the unique codes which identify your grant. So, ledger 5 accounts will translate as follows:

Old FRS Account 524231

	Fund	Org	Program	Grant Code
Banner Account	340402	9910	800	G09051
	(six digits)	(four digits)	(three digits)	(six digits)
		(denotes department)	(expense category)	

However, you do not have to enter every part of your FOAPAL with each transaction. Banner allows the use of a “short-cut” by using the Index field – if you enter your org or fund in the Index field, Banner will default the respective values for the Fund, Org and Program codes. If you are preparing a financial transaction and enter your Org or Fund code in the Index field, the Fund, Org and Program code values will default for ease of data entry. Using the Index field should minimize posting errors.

Note: If you enter the wrong code in the Index field, your financial transaction will post to the wrong Fund and Org. You should always verify your Org and Fund information after you enter the code in the Index field before proceeding.

CONVERSION

The current Legacy system, i.e. FRS-Plus, provides for the use of a six digit department code, six digit map code and four digit object code. For example; if you were to access screen 19 in FRS and select account 120300; you would see the related map code 016001. 120300 identifies the department (Controller's Office) 016001 identifies the map code which accumulates assets and liabilities. If you wanted to know the amount spent on office supplies, you would look at object code and 4010 which identifies the type of charge (office supplies). The term "department code" in the legacy system will become "organization code" in Banner. "Object Codes" in the legacy system will become "Account Codes" in Banner. The term "map code" in the legacy system will become "fund code" in Banner. "Program codes", a new feature offered by Banner, will further define the organization code by its functional area (such as instruction, research, institutional support, etc) and will be used primarily by the accounting office. Activity codes, another new feature offered by Banner, will provide for more detailed identification of an area's activity – most departments will not use these codes.

"Crosswalk" documentation from the legacy system to Banner Finance is provided in the attachment. We have listed the old FRS account number and the corresponding Banner FOAPAL. We have also provided a listing of the most frequently used Banner Account Codes.

The Accounting Office is updating all forms to incorporate the new Banner FOAPAL. The following forms have been updated and will be available July 1 – please be sure to use the proper form:

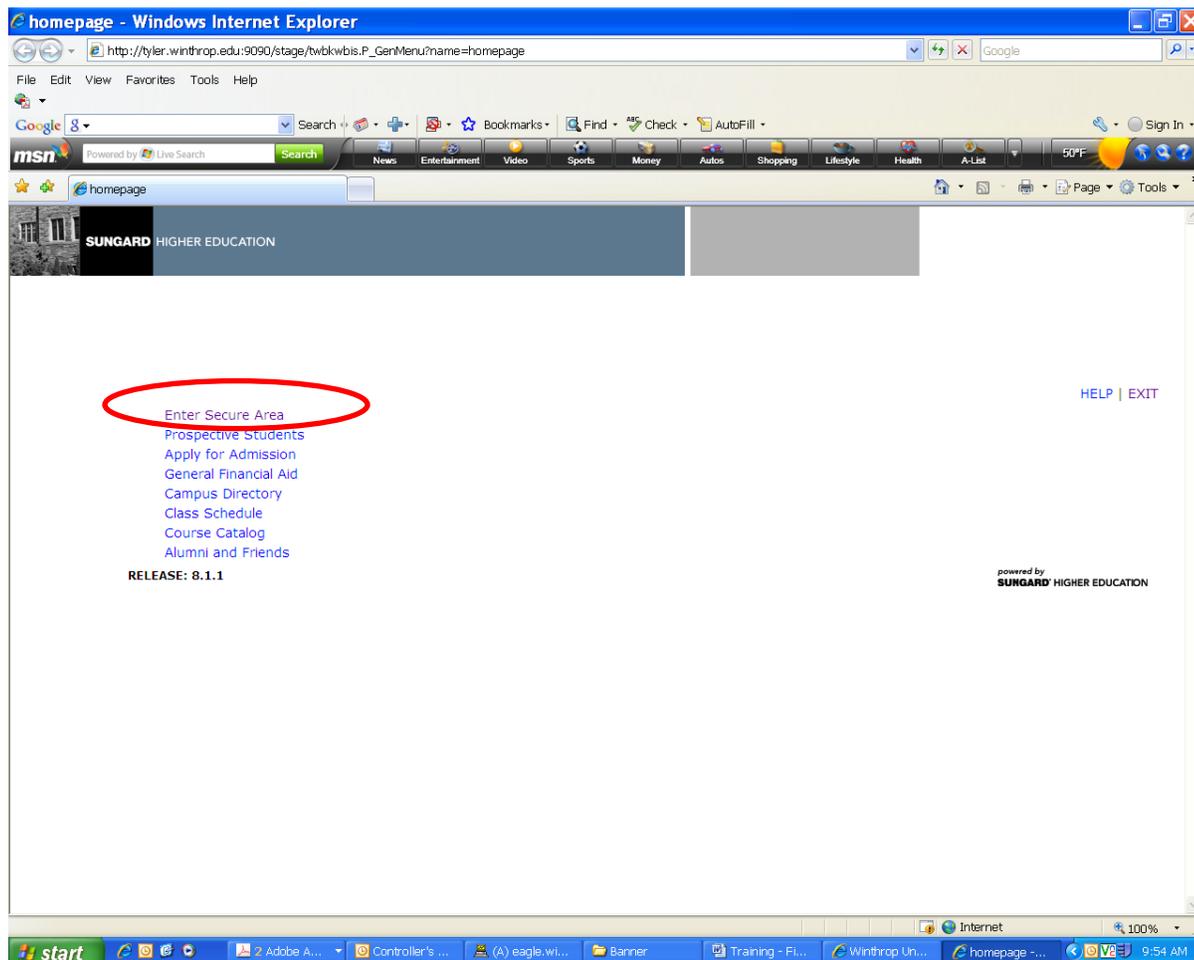
- Check Request Voucher
- Travel Authorization
- Travel Reimbursement
- Wire Transfer
- Contract for Professional Services
- Cashier's Departmental Deposit

NAVIGATING IN BANNER SELF SERVICE

Users will access Banner Finance through a feature called “Self Service Banner” or SSB. You can login to SSB through your Web browser from on- or off-campus. Internet Explorer 6 (for Windows) or higher or Safari 1.0 or higher (for Mac OSX) is recommended.

The log-in site is: <http://tifton.winthrop.edu:9090/> Please click on the “Production Database – Username Method” Link.

Next, select the Secure Area option indicated by the circled selection below.



Enter your Winthrop University Identification number which begins with a “W”. Enter your Personal Identification Number or PIN which is set to your birthday (MMDDYY). Then click on “Login”. If you have forgotten your PIN, you may click on the Forgot PIN? Option and follow the Banner instructions (we will show you how Banner provides that feature shortly).

The screenshot shows a Windows Internet Explorer browser window titled "User Login - Windows Internet Explorer". The address bar displays the URL "http://tyler.winthrop.edu:9090/stage/twbkwbis.P_WWWLogin". The browser interface includes a search bar with "Google" and "msn" logos, and a navigation menu with categories like News, Entertainment, Video, Sports, Money, Autos, Shopping, Lifestyle, Health, and A-List. The main content area of the page features the "SUNGARD HIGHER EDUCATION" logo and the following text:

HELP | EXIT

Please enter your User Identification Number (ID) and your Personal Identification Number (PIN). When finished, select Login.

Please Note: ID is Case Sensitive

To protect your privacy, please Exit and close your browser when you are finished.

User ID:

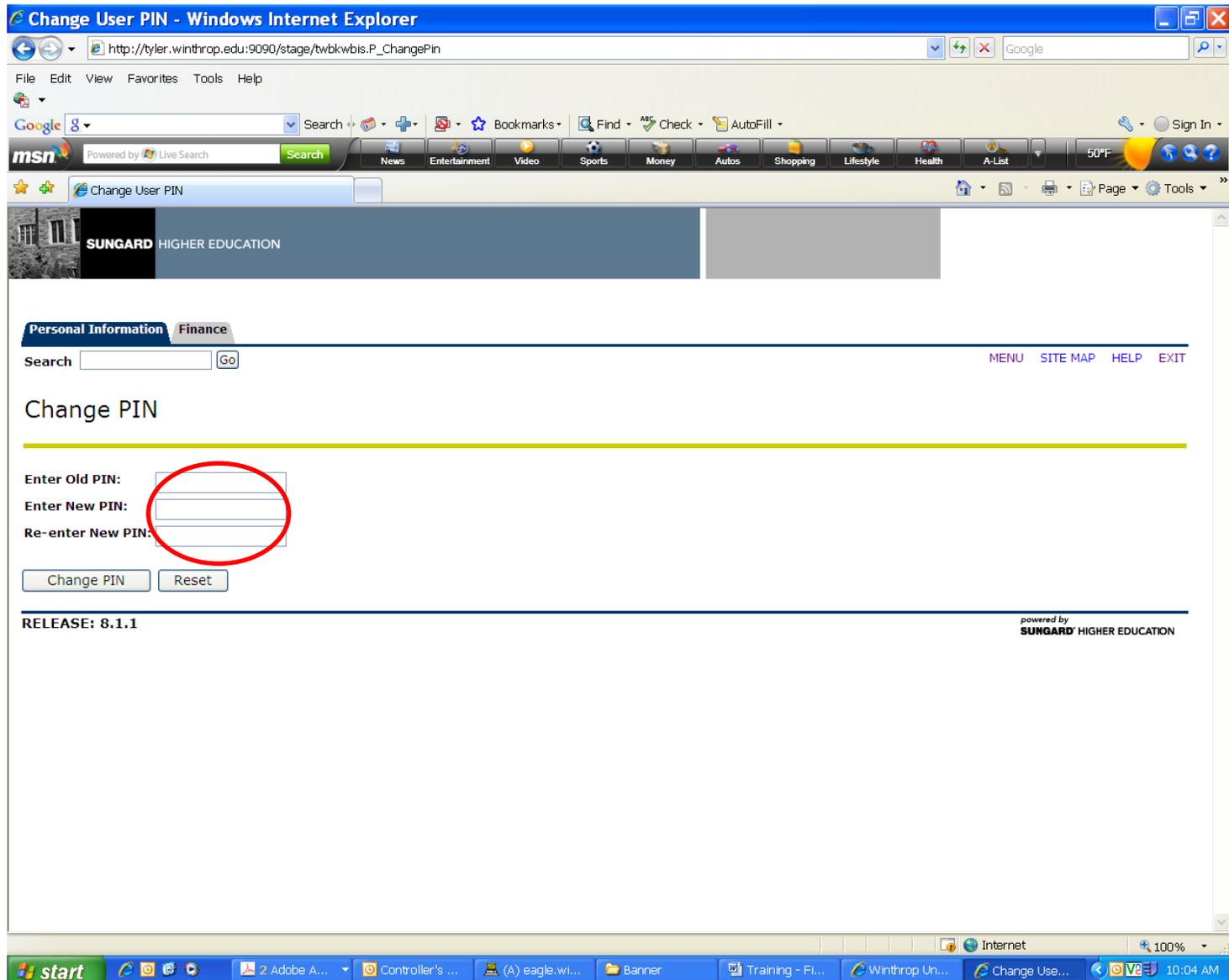
PIN:

RELEASE: 8.1.1

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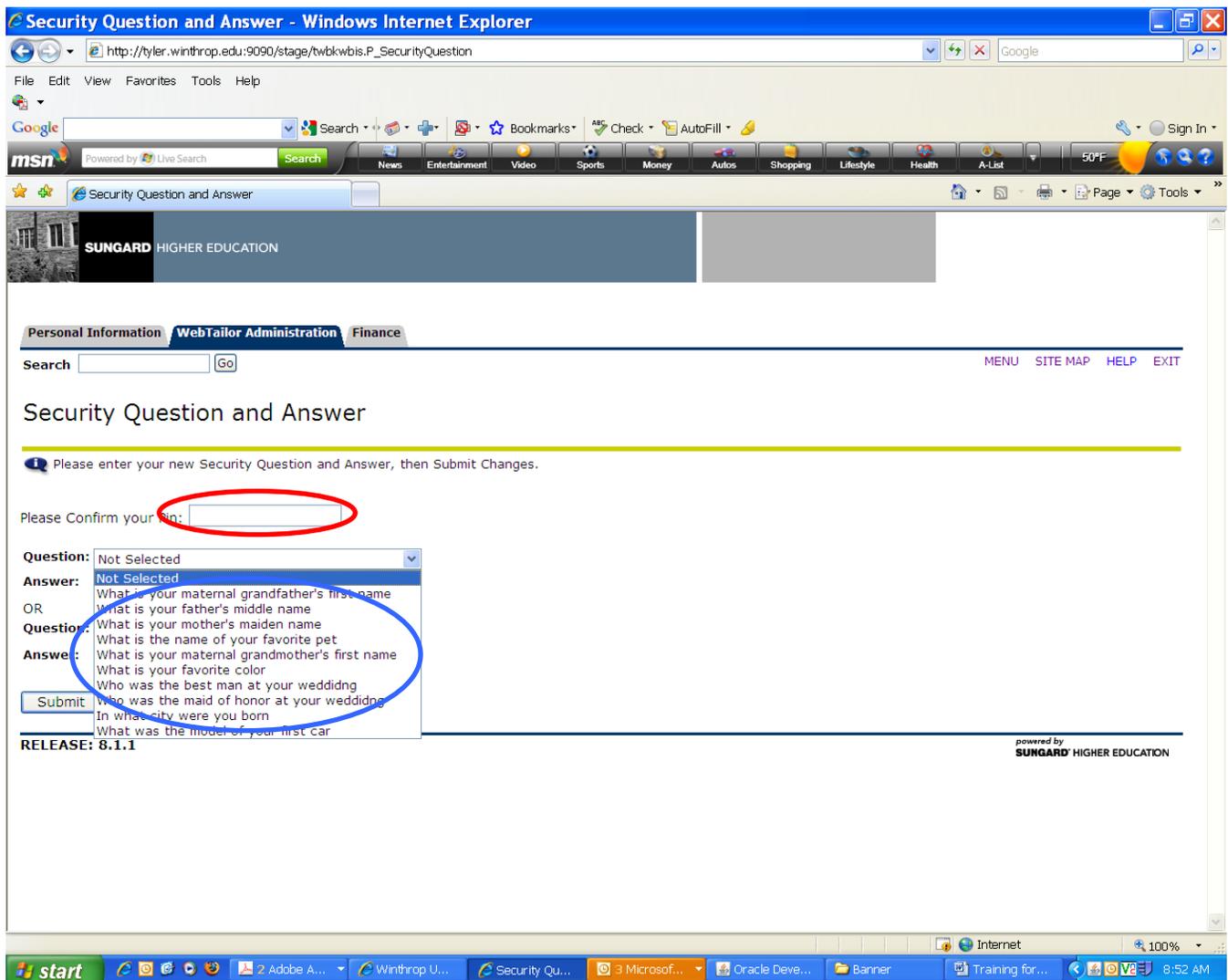
The bottom of the screenshot shows the Windows taskbar with the Start button and several open applications, including Adobe Acrobat, Controller's..., (A) eagle.wi..., Banner, Training - Fi..., Winthrop Un..., and User Login -... The system clock shows 10:00 AM.

When you log onto the system for the very first time, you will be prompted to change your PIN. Re-enter your “old” PIN (which is your birthday in MMDDYY format), then enter and confirm your new PIN. Your PIN must be fifteen characters or less and is alpha-numeric. The PIN you select is case sensitive, so be careful with capitalization. Then click on the Change Pin option.

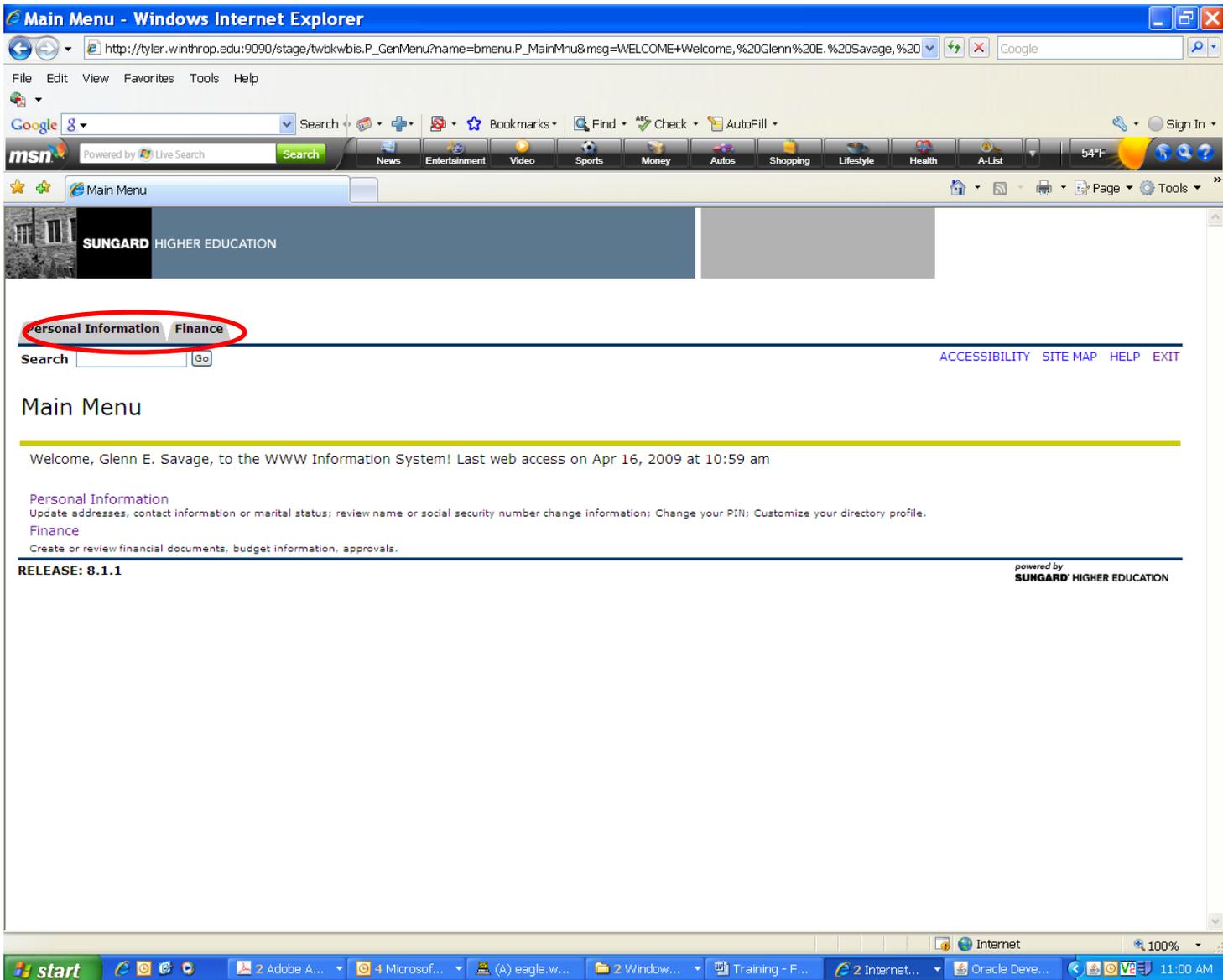


Banner will now require the user to enter a security question and appropriate response in case the user forgets his/her PIN. You must confirm you new PIN, then select from a predetermined list or you may develop your own question. When you have completed the question and answer, click on submit.

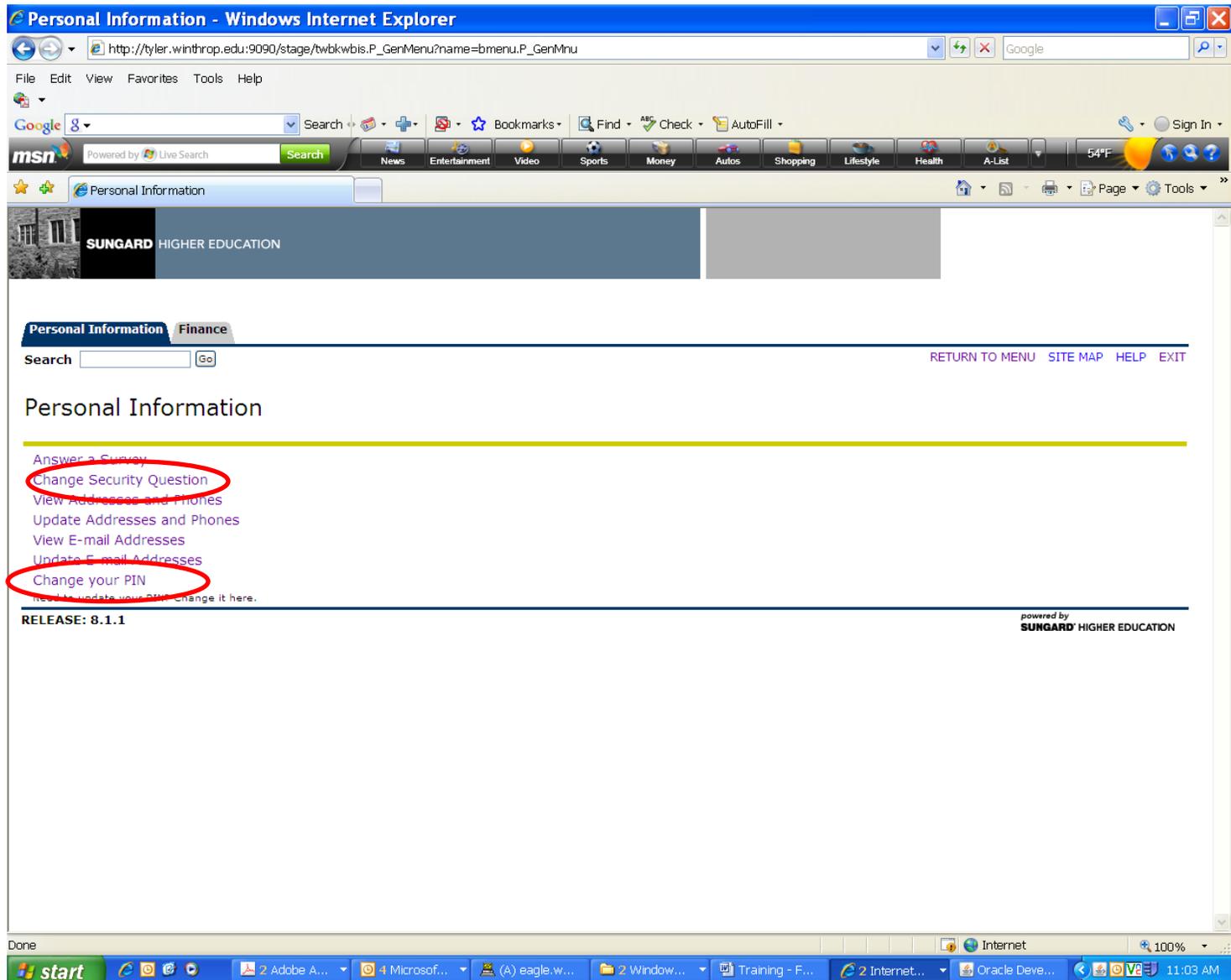
Note: If you try to log in unsuccessfully five times, your password will be disabled. If that happens, please contact the Information Technology Help Desk at Extension 2400 to reset your password.



You will be returned to the Main Menu. At the “Main Menu” screen, you may choose the Personal Information or “Finance” Tabs as indicated by the circled selection below.



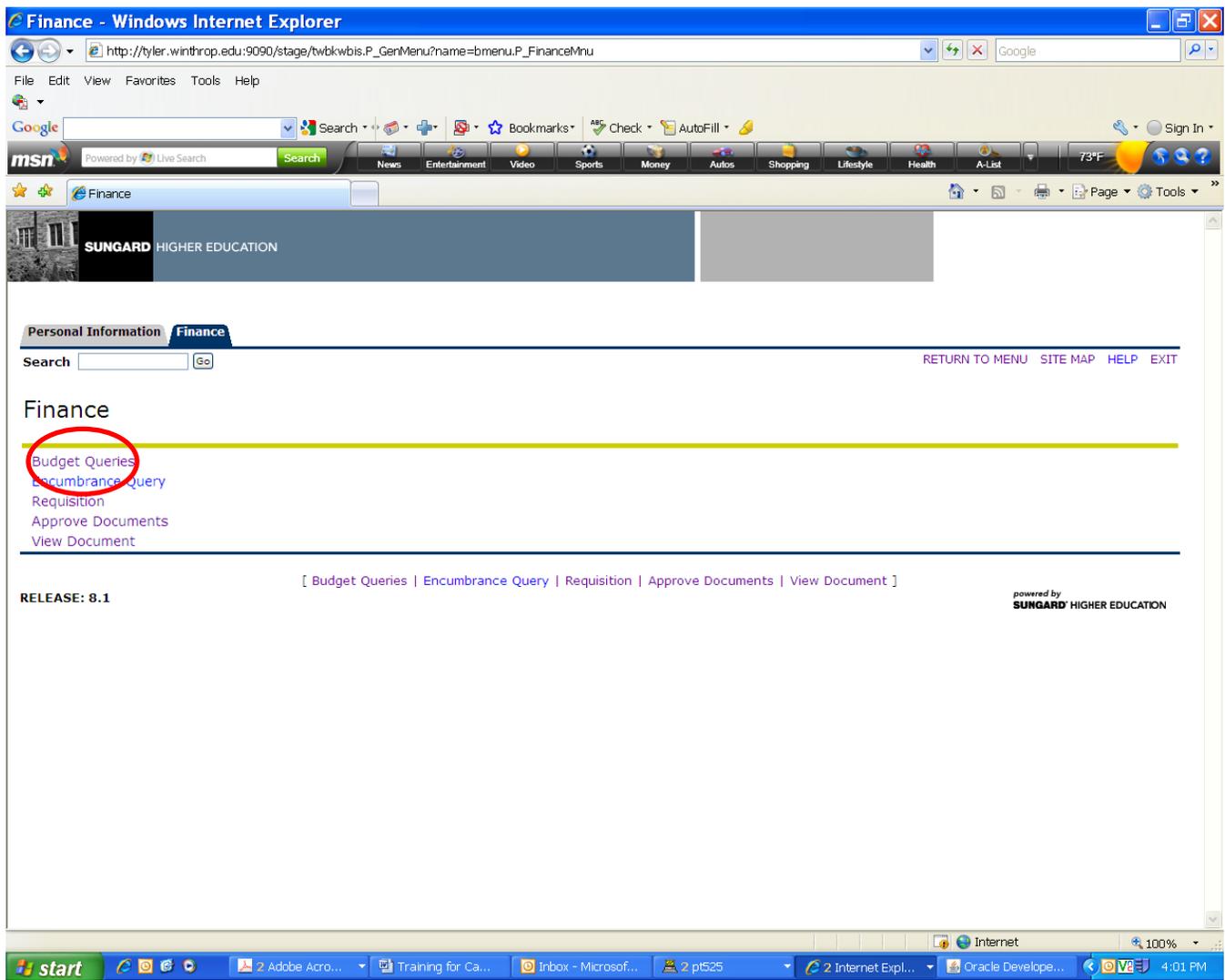
Selecting the Personal Information Tab will enable you to view and update your information. . The Personal Information Tab will not be fully functional until Banner Human Resources comes live in July, 2011. The only links that are functional are the Change Security Question and Change Your PIN.



To get started in Banner Finance, select the “Finance” tab, there will be several options from which to choose. In this training session, we will review the Quick Budget Query which is found in the Budget Queries link as shown.

Features of Self-Service Banner (SSB) include:

- Point and Click Capabilities
- Drill down to Document Views
- Easy Downloads into Excel
- Offers comparison with past fiscal years (this feature not yet available)
- Excellent tool for Hierarchy reporting needs
- Excellent tool for Faculty Grant balance queries

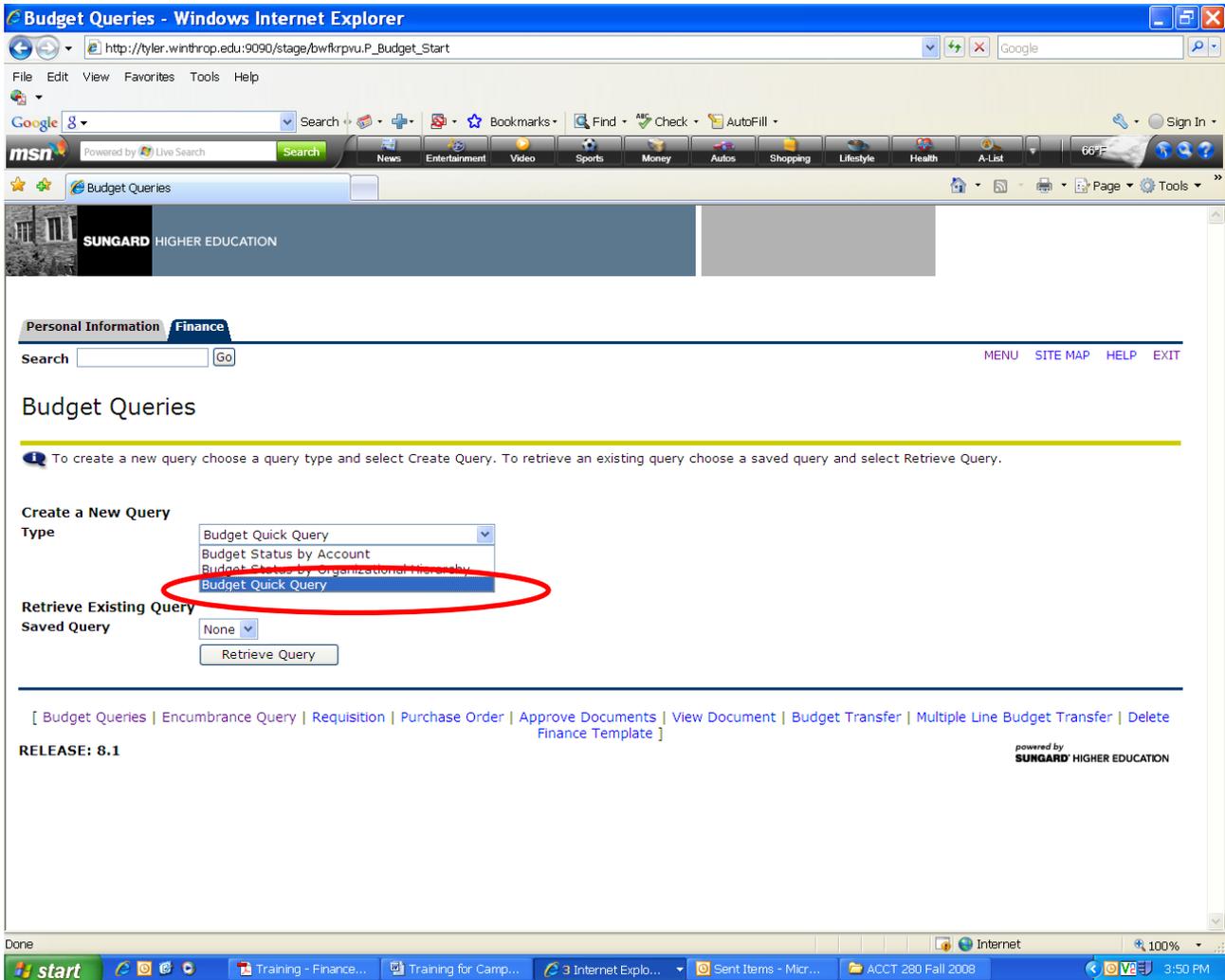


Upon entering the “Budget Queries” menu, there will be three options from which to choose.

- 1- Budget Quick Query
- 2- Budget Status by Organizational Hierarchy (This topic is covered in Banner Advanced)
- 3- Budget Status by Account (This topic is covered in Banner Advanced)

Budget Quick Query

The Budget Quick Query allows you to review budget information by account for the Fiscal Period and Year-to-Date by: Specific FOAPAL, Specific Organization, Fund Type, Account Type or Revenue Accounts. Banner contains security features which restrict your access to account information – you may only access information on those accounts for which you have been granted specific authorization. For instance, if you are in the Athletic Department, you may view accounts related to your responsibilities in the Athletic Department, but you could not view account information related to the College of Business. To begin, click on the Budget Quick Query option in the drop-down menu.



Budget Quick Query provides a Banner summarized budget analysis of a specified FOAPAL. This report can be run at any time during the month. However; the data presented is cumulative through the most current month and recently posted data. Do not check the box “Include Revenue Accounts” unless you are accessing information on a revenue generating account (such as an old FRS ledger 2 account).

Insure the fiscal year is set to 2009. Enter the Chart of Accounts as “W” and enter the desired Org or Fund Code into the Index field (if known – for training purposes, input the value 1515 into the Index field) and click on the Submit Query button.

Budget Queries - Windows Internet Explorer

http://tyler.winthrop.edu:9090/stage/bwfrpvu.P_Budget_Start?complete=LOOKUP&lookup_code=Index&lookup_value=1515&lookup_acci_fund=12X1

File Edit View Favorites Tools Help

Google Search

msn Powered by Live Search Search

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Budget Queries

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Personal Information WebTailor Administration Finance

Search [] Go MENU SITE MAP HELP EXIT

Budget Queries

Fiscal year: 2009

Chart of Accounts: W Index: 1515

Fund: Grant: Account: Activity: Location: Commitment Type: All

Include Revenue Accounts

Save Query as: []

Shared

[Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document]

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Banner will fill in the information related to Fund, Organization and Program. You will note the Index value you entered is no longer displayed – that is because Banner uses the Index value to default the Fund, Org and Program codes – once these values are populated, the Index is no longer needed. You do not have to input an account code value because you are not creating a financial transaction – rather, you are merely reviewing your department’s budget status. Always verify the fund and org codes are correct before proceeding.

Budget Queries - Windows Internet Explorer

http://tyler.winthrop.edu:9090/stage/bwfkpvu.P_Budget_Start

File Edit View Favorites Tools Help

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Personal Information WebTailor Administration **Finance**

Search [] [Go] MENU SITE MAP HELP EXIT

Budget Queries

Fiscal year: 2009

Chart of Accounts: W Index: []

Fund: 12X030 Grant: []

Organization: 1515 Account: []

Program: 500 Activity: []

Location: [] Commitment Type: All

Include Revenue Accounts

Save Query as: []

Shared

[Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document]

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If you would like to search for a specific org code or fund code via the Index field, you can do that. For instance, if you do not know the desired code, you may click on the index box to select the desired code from a list.

The screenshot shows a Windows Internet Explorer browser window displaying the 'Budget Queries' page. The browser's address bar shows the URL: http://tyler.winthrop.edu:9090/stage/bwfkprvu.P_Budget_Start. The page header includes the SUNGARD HIGHER EDUCATION logo and navigation links for 'Personal Information' and 'Finance'. A search bar is present with a 'Go' button. The main heading is 'Budget Queries'. Below this, a help message states: 'Enter a value in either the Organization or Grant fields as well as the Fiscal Year and Chart of Accounts fields. If Grant is populated then resulting information is inception through the end of the fiscal year, from Grant Ledger. Otherwise, all information retrieved is through the fiscal year to date.' The form contains several fields: 'Fiscal year' (set to 2009), 'Chart of Accounts' (set to W), 'Fund', 'Organization', 'Program', 'Location', 'Grant', 'Account', 'Activity', and 'Commitment Type' (set to All). The 'Index' button is circled in red. There are also checkboxes for 'Include Revenue Accounts' and 'Shared', a 'Save Query as:' field, and a 'Submit Query' button. At the bottom, there are navigation links: [Budget Queries | Encumbrance Query | Requisition | Purchase Order | Approve Documents | View Document | Budget Transfer | Multiple Line Budget Transfer | Delete Finance Template]. The page footer includes 'RELEASE: 8.1' and 'powered by SUNGARD HIGHER EDUCATION'. The Windows taskbar at the bottom shows the Start button, several open applications, and the system clock at 4:02 PM on 10/10/2008.

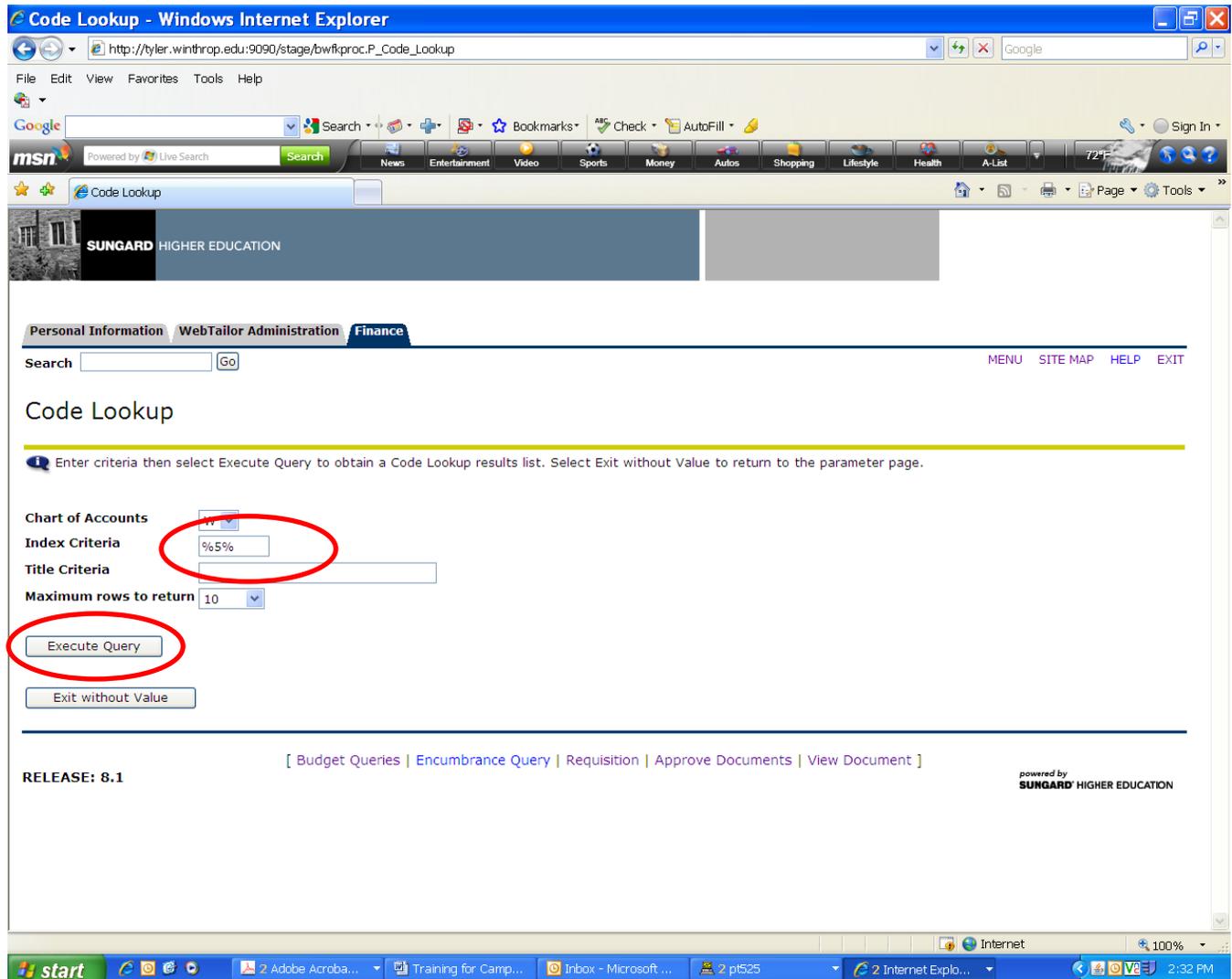
Banner will display the first 25 results of Codes that contain the number 1 (we don't have 25 Codes that begin with the number 1, so Banner returned all values).

The screenshot shows a Windows Internet Explorer browser window displaying a web page titled "Code Lookup". The browser's address bar shows the URL: `http://tyler.winthrop.edu:9090/stage/bwfkproc.P_Code_Lookup`. The page features a search bar with the text "Code Lookup" and a "Go" button. Below the search bar, there are navigation tabs for "Personal Information", "WebTailor Administration", and "Finance". The main content area displays the heading "Code Lookup" and a message: "Select a code to return the value to the parameter page or Exit without Value to return without a value. Select Another Query to return to the Code Lookup page." Below this message is a table of "Code lookup results".

Title	Index	Fund	Organization	Account	Program	Activity	Location
President	1120	111020	1120		500		
Special Campus Forums	1130	111020	1130		500		
Athletic Administration	1515	12X030	1515		552		
Athletics Training Room	1520	12X030	1520		500		
Athletic Advertising	13X120	13X120	1525		331		
Mens Baseball Activities	13X320	13X320	1605		552		
Winthrop Writing Network	142230	142230	2605		331		
Model UN	142420	142420	2815		331		
Marketing Service Learning	143180	143180	3410		111		
Peabody Activities	144020	144020	4810		331		
CVPA Winthrop Theater	145220	145220	5420		111		
Study Abroad Misc Fees	145630	145630	2315		111		
Library Foundation	145840	145840	5820		441		

Below the table, there are two buttons: "Exit without Value" and "Another Query".

If you knew that your Code had the number 5 in it, but you could not remember where the number 5 was, you could search for all Codes that contained the number 5. Just type %5% in the Index Criteria field and click on the Execute Query button.



Banner would return the first 10 Codes that had the number 5 in it.

Code Lookup

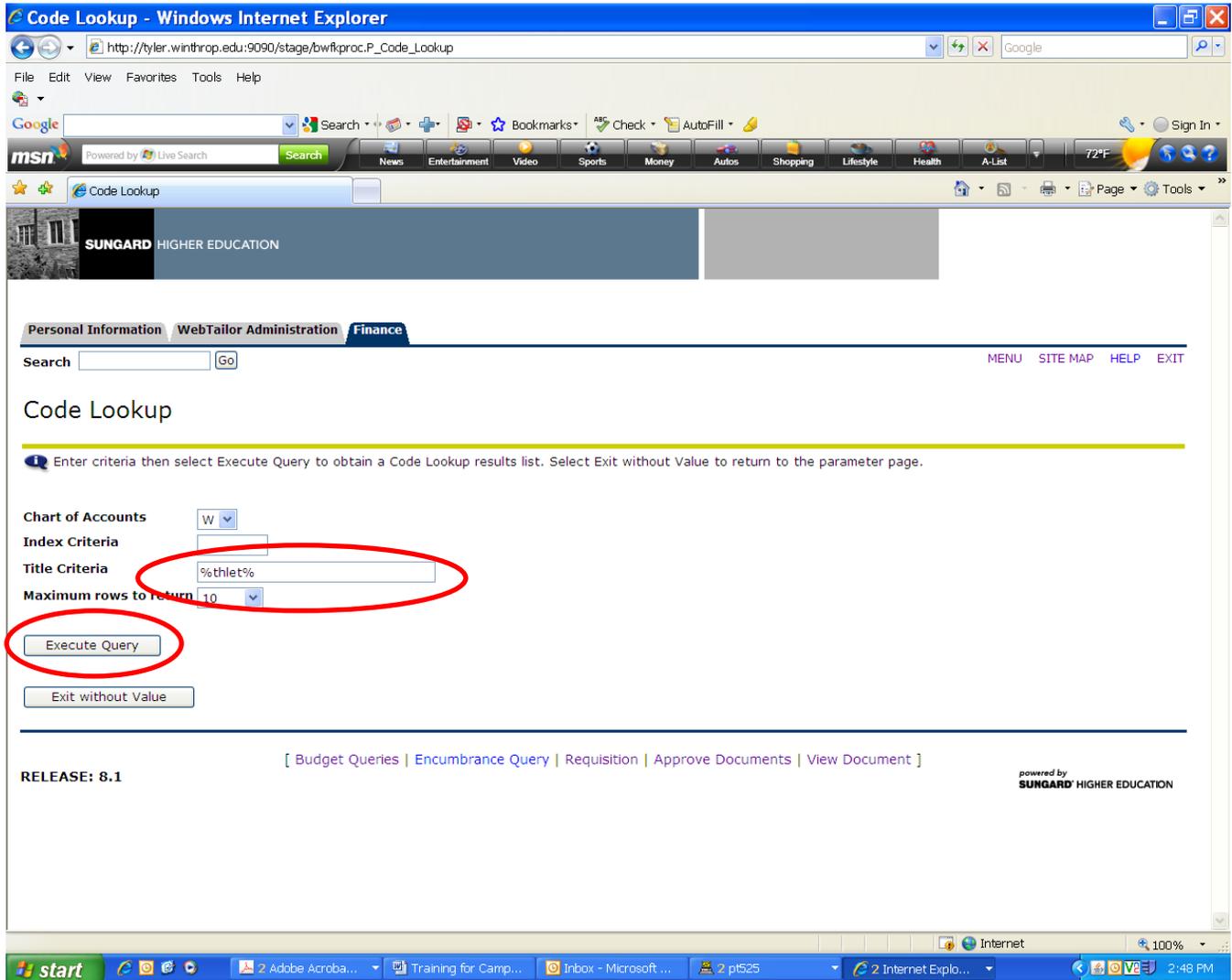
Select a code to return the value to the parameter page or Exit without Value to return without a value. Select Another Query to return to the Code Lookup page.

Code lookup results

Title	Index Fund	Organization Account	Program Activity	Location
Athletic Administration	1515	12X030 1515		552
Athletics Training Room	1520	12X030 1520		500
Dean of Arts and Science	2415	111020 2415		446
Arts and Sciences Student Services	2455	111020 2455		446
English	2605	111020 2605		111
Human Nutrition	2655	111020 2655		111
Master of Liberal Arts	2705	111020 2705		445
Modern Languages	2755	111020 2755		111
Political Science	2805	111020 2805		111
Social Work	2855	111020 2855		111

[Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document]

Another search feature is by Title. The Title Criteria field is case sensitive, so the way in which you spell the word is very important. If you know that your Code has the word “Athletic” in it, you can use the Title Criteria Search. We recommend that you use a wildcard as the first character (that way you don’t have to worry about capitalization). Just type in any part of the word “Athletic”, include your wildcards where needed, and select the number of returns you wish to see. Then click on Execute Query.



Banner will return information on the first 10 Codes that have “thlet” in it.

Code Lookup - Windows Internet Explorer

http://tyler.winthrop.edu:9090/stage/bwfkproc.P_Code_Lookup

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Code Lookup

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Search Go MENU SITE MAP HELP EXIT

Code Lookup

Select a code to return the value to the parameter page or Exit without Value to return without a value. Select Another Query to return to the Code Lookup page.

Code lookup results

Title	Index	Fund	Organization	Account	Program	Activity	Location
Athletic Administration	1515	12X030	1515			552	
Athletics Training Room	1520	12X030	1520			500	
Athletic Advertising	13X120	13X120	1525			331	

Exit without Value

Another Query

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Whether you use the Index or Title search criteria, you can click on the desired Code to make your selection. After you select your Code, you will be returned to the previous screen.

Code Lookup - Windows Internet Explorer

Address: http://tyler.winthrop.edu:9090/stage/bwfkproc.P_Code_Lookup

Search:

Code Lookup

Select a code to return the value to the parameter page or Exit without Value to return without a value. Select Another Query to return to the Code Lookup page.

Code lookup results

Title	Index	Fund	Organization	Account	Program	Activity	Location
President	1120	111020	1120		500		
Special Campus Forums	1130	111020	1130		500		
Athletic Administration	1515	12X030	1515		552		
Athletics Training Room	1520	12X030	1520		500		
Athletic Advertising	13X120	13X120	1525		331		
Mens Baseball Activities	13X320	13X320	1605		552		
Winthrop Writing Network	142230	142230	2605		331		
Model UN	142420	142420	2815		331		
Marketing Service Learning	143180	143180	3410		111		
Peabody Activities	144020	144020	4810		331		

[[Budget Queries](#) | [Encumbrance Query](#) | [Requisition](#) | [Approve Documents](#) | [View Document](#)]

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Done

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Banner will fill in the information related to Fund, Organization and Program. As was noted earlier, the Index value you selected is not displayed. You do not have to input an account code value because you are not creating a financial transaction – rather, you are merely reviewing your department’s budget status. Always verify the fund and org codes are correct before proceeding.

If you use this query a lot, you may give a name to your query and Banner will “save” your parameters. You will then be able to select your saved query by retrieving it from the previous form.

After you have named your query, click on the Submit Query button to view your results.

Please do NOT check the Shared button – this will result in your saved query being seen by all users. If all the information is correct, click on the Submit Query button again to view your results.

Budget Queries - Windows Internet Explorer

http://tyler.winthrop.edu:9090/stage/bwfkprvu.P_Budget_Start

File Edit View Favorites Tools Help

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Budget Queries

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Personal Information WebTailor Administration **Finance**

Search [] Go MENU SITE MAP HELP EXIT

Budget Queries

Fiscal year: 2009

Chart of Accounts W Index

Fund 12X030 Grant

Organization 1515 Account

Program 500 Activity

Location Commitment Type: All

Include Revenue Accounts

Save Query as: []

Shared

The circled items are required fields on this form

Type the name of your query in this field

[Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document]

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The parameters that are displayed in the report for this query are as follows: Adjusted Budget, Year-to-date actual expenses, Commitments (Funds that are committed because a Requisition or Purchase Order has been processed but no actual invoice has been paid), and Available Balance. This report lists all account codes associated with your Index Code. It does not provide the means for you to view detail information, but the Budget Quick Query does give a complete view of a particular Organization. If you had selected an account code as a parameter, Banner would have only provided information on that one account code – we recommend you do not input a value into the account code field when using the Quick Budget Query.

Report A - Windows Internet Explorer

http://tyler.winthrop.edu:9090/stage/bwkrpvu.P_Budget_Start

File Edit View Favorites Tools Help

Google Search

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Report A

Report Parameters

Organization Budget Status Report

By Account

Period Ending Jun 30, 2009

As of May 16, 2009

Chart of Accounts	W Winthrop University	Commitment Type	All
Fund	12X030 Current Unrest Student Activity Fds Program	500 Student Services	
Organization	1515 Athletics Administration	Activity	All
Account	All	Location	All

Query Results

Account	Account Title	Adjusted Budget	Year to Date	Commitments	Available Balance
71015	OTHER DIRECT OPERATING BUDGET ACCT	66,000.00	0.00	0.00	66,000.00
71021	Telephone Toll Charges	0.00	0.00	375.00	(375.00)
71026	Repairs Motor Pool	0.00	11,316.66	0.00	(11,316.66)
71075	Contract Serv Other	0.00	0.00	3,000.00	(3,000.00)
71098	Number 2 Fuel Oil	0.00	7,600.00	0.00	(7,600.00)
71111	Office Supplies	0.00	717.00	18,301.34	(19,018.34)
71112	Follett Supplies	0.00	0.00	6,468.00	(6,468.00)
71116	Food Supplies	0.00	0.00	500.00	(500.00)
71351	Minor Equipment Less Than \$5000	0.00	0.00	5,350.00	(5,350.00)
72215	Employee Foreign Travel	0.00	1,320.00	0.00	(1,320.00)
77020	Utilities Power	0.00	12,000.00	0.00	(12,000.00)
Report Total (of all records)		66,000.00	32,953.66	33,994.34	(948.00)

[[Budget Queries](#) | [Encumbrance Query](#) | [Requisition](#) | [Approve Documents](#) | [View Document](#)]

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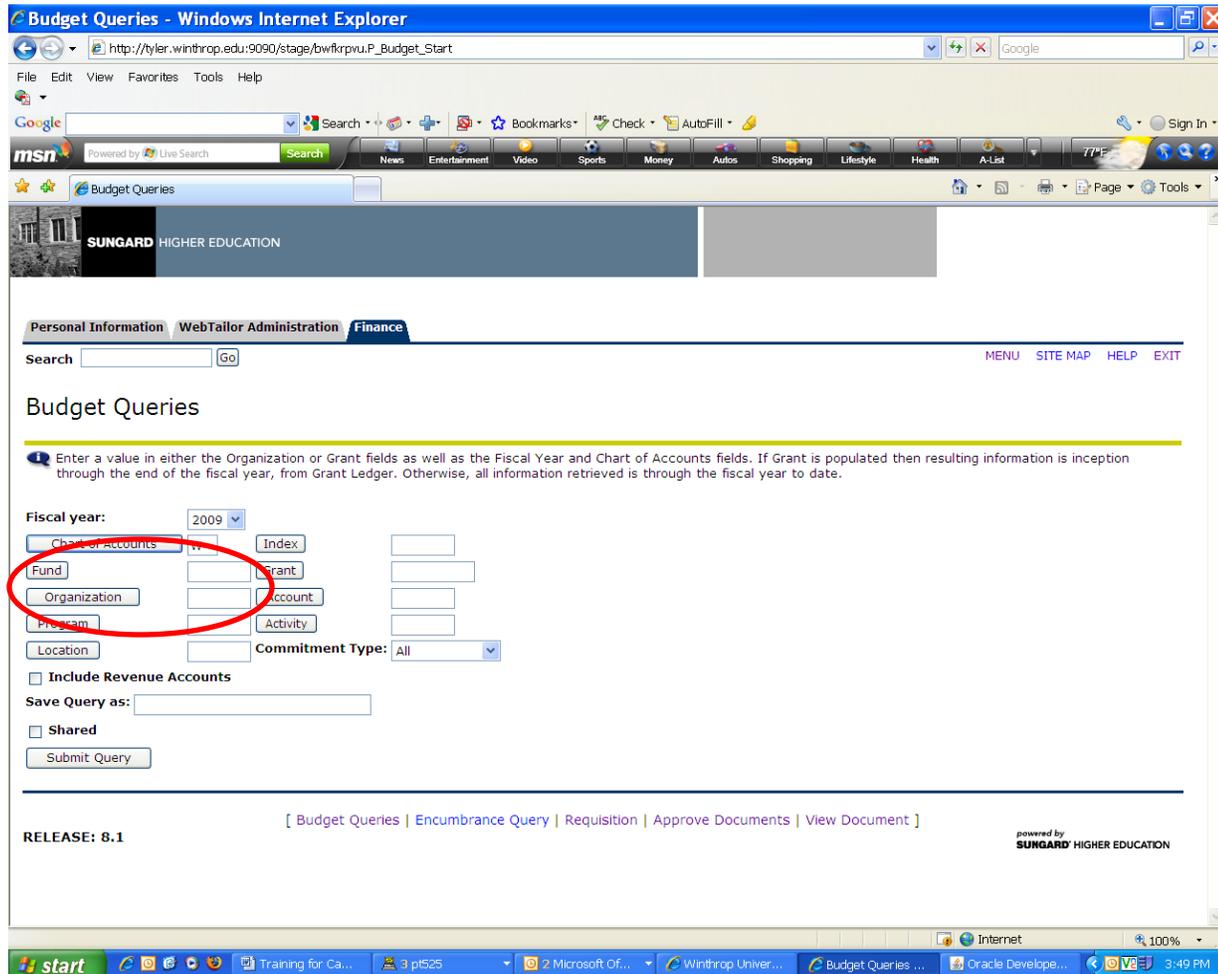
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Done

start

2 Adobe Acroba... Training for Camp... Inbox - Microsoft ... pt525 2 Internet Explo... 3:04 PM

If you do not wish to search on the Index Code, you may search on the individual FOAPAL elements. If you search on the Org field, you will get:



Please note there are some Org Titles that are in all capital letters. These Org codes cannot be used when creating financial transactions. Rather, they are used in Organization Hierarchy reporting (we will cover Organization Hierarchy in Banner Advanced). For instance, Org codes 2400, 2405, 2410, 2450, etc are non-data enterable. Fund and Account codes have similar Hierarchal structures – any Title which is in all capital letters is non-data enterable and is used for Hierarchal reporting purposes only.

Research Counsel Grants	2375
COLLEGE OF ARTS AND SCIENCES	2400
DEAN OF ARTS AND SCIENCES	2405
DEAN OF ARTS AND SCIENCES	2410
Dean of Arts and Sciences	2415
Arts and Sciences Interim Faculty	2420
Arts and Sciences Lab Fees	2425
Arts and Sciences Professional Dev	2430
ARTS AND SCIENCES STUDENT SERVICES	2450
Arts and Sciences Student Services	2455
Arts and Sciences Undergrd Research	2460
Arts and Sciences Graduate Research	2465
BIOLOGY	2500
Biology	2505
CHEMISTRY, PHYSICS AND GEOLOGY	2550
Chemistry Physics And Geology	2555
ENGLISH	2600
English	2605
Writing Center	2610
HISTORY	2625
History	2630
HUMAN NUTRITION	2650
Human Nutrition	2655
MASS COMMUNICATION	2675
Mass Communication	2680
WINR Radio Station	2685
MASTER OF LIBERAL ARTS	2700
Master of Liberal Arts	2705
MATHEMATICS	2725
Mathematics	2730
MODERN LANGUAGES	2750
Modern Languages	2755
PHILOSOPHY	2775
Philosophy	2780
POLITICAL SCIENCE	2800
Political Science	2805
Social and Behavioral Research Lab	2810
Model UN	2815

If you select an account for which you do not have security to view, you will get a “no records found” message.

The screenshot shows a Windows Internet Explorer browser window displaying a report titled "Report A". The address bar shows the URL: http://tyler.winthrop.edu:9090/stage/bwkrpvu.P_Budget_Start. The browser's search bar contains "Google". The page header includes the "SUNGARD HIGHER EDUCATION" logo and navigation links for "Personal Information" and "Finance". A search bar is present with a "Go" button. The main content area is titled "Report Parameters" and displays the following information:

Organization Budget Status Report
By Account
Period Ending Jun 30, 2009
As of May 16, 2009

Chart of Accounts W Winthrop University Commitment Type All

Fund	12X030 Current Unrest Student Activity Fds	Program	552
Organization	1515 Athletics Administration	Activity	All
Account	All	Location	All

Below the table, a yellow warning icon is displayed with the message: "Query retrieved no records". A button labeled "Another Query" is located below the message. At the bottom of the page, there are links for "Budget Queries", "Encumbrance Query", "Requisition", "Approve Documents", and "View Document". The footer includes "RELEASE: 8.1" and "powered by SUNGARD HIGHER EDUCATION". The Windows taskbar at the bottom shows the Start button, several open applications (Adobe Acrobat, Training for Ca..., Inbox - Microsof..., pt525), and the system clock showing 3:50 PM on 5/16/2009.

Please note you may get this same message if you are working with an account for which you do have security, but there is simply no information based on the criteria you have selected.