FIS Banner Navigation and Query
FIS Banner Online Help

FIS Launch Page  http://fis.ucsc.edu

FIS System Guide  http://financial.ucsc.edu/Pages/Systems_FISGuide.aspx

FIS Manual  http://finaff.ucsc.edu/banner

Workstation Setup  http://fis.ucsc.edu/workconfig.html

FIS Training  http://financial.ucsc.edu/Pages/TrainingFIS.aspx
Class Outline - 1:00 to 5:00

- Welcome
- Overview of FIS BANNER
- Logging on / off
- Accessing BANNER Forms
- BANNER Form Functions and Navigation
- Exercises
- Banner Querying
- Exercises
- Proficiency Exercise*

* A proficiency exercise is completed at the end of class. You will be entitled to your logon when you pass the exercise. You must also have an account with ITS and have submitted a BANNER Access Form before receiving your logon.
How to Get an FIS Account

You must have a valid FIS account to access FIS Banner. Information on required forms for staff, faculty and temporary staffing appointment FIS accounts can be found here: http://financial.ucsc.edu/Pages/Systems_FISGuide.aspx#get

List of Account Forms:
- Account Modification Form
- Access to Information Statement
- UCSC FIS Access Request Form

Fax All Three Forms to ITS Support Center fax 459-4171
Common FIS Query Forms

FOIDOCH  Document History Form
FAIINVE  Invoice/Credit Memo Query Form
FPIPURR  Purchase Order Query Form
FAIVNDH  Vendor Detail / History Form
FOAAINP  Documents in Approval Form
FOIAPPH  Documents Approval History
FGIDOCHR  Document Retrieval Inquiry
FGIBDST  Organization Budget / Financial Status Form
Topics

- Welcome & Introductions
- Overview
- Banner Main Menu
- Parts of a Banner Form
- Functions & Navigation
- Query & Find Forms
Introductions

- Lab rules
- Handouts
- Equipment Adjustments
Healthy Mousing

- **Proper Equipment Setup**
  - Same height as keyboard
  - Minimize arm extension
  - Alternate hands
  - Programmable mouse
  - EH&S 459-2553

- **Proper Movement**
  - Keep it close to you
  - Hold with light grip
  - Move using arm’s large muscle groups
  - Minimize bending the wrist

- **Proper Comfort**
  - Frequent breaks
  - Keep hands warm
  - Perform hand exercises

http://ehs.ucsc.edu/injury_illness_prevention/
System Overview

FIS
Financial Information System

Banner Systems used by UCSC, focusing on different data.

Banner
Application Software - access, inquire, enter data, reports

Oracle
Relational Database - stores, retrieves and modifies data
System Overview

ORACLE stores data in tables.

<table>
<thead>
<tr>
<th></th>
<th>Co1-field</th>
<th>Co2-field</th>
<th>Co3-field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Row1-record</td>
<td>Name</td>
<td>City</td>
<td>State</td>
</tr>
<tr>
<td>Row2-record</td>
<td>Name</td>
<td>City</td>
<td>State</td>
</tr>
</tbody>
</table>

BANNER accesses these underlying tables, and displays the data in FORMS.

We use FORMS to add, change, delete or view information.

FORMS are organized using fields, records, and blocks.
Logging On to Banner

- Account setup
- Log on via the Internet
  - Internet Explorer for PC *(recommended)*
  - Safari for Mac *(recommended)*
- Your logon is your signature – keep it private
  - Recommend changing every 90 days
- Selecting or changing passwords
  - Refer to FIS Manual
Financial Information System

FIS Production

Click here to enter FIS

ANNOUNCEMENTS

02/13/2000
FIS Manual for FIS 7.0 Now Available

Thanks to the hard work of our FIS team, the FIS Manual for FIS 7.0 is now available. You can find it in the left navigation bar of this page, under FIS Manual.

WARNING! The above link launches the University of California Santa Cruz Financial Information System login process. Access is limited to authorized UCSC employees only. Unauthorized access is prohibited.

FIS Normal Hours

Monday - Saturday 7:00 AM - 7:00 PM

Other Hours Generally Available

Monday - Saturday 7:00 PM - 9:00 PM
Sunday 7:00 AM - 9:00 PM

For help logging into the FIS User Train database, please email fis_probs@ucsc.edu
UC Santa Cruz - Financial Information System

*** IMPORTANT: DO NOT CLOSE THIS PAGE ***

Closing this page or using it to navigate to another website will end your FIS session.
Type in User ID

Type in Confidential Password

ORACLE FUSION MIDDLEWARE
Selecting and Entering a Form

- Type in Form Name
- Browse Folders to Locate Form By Type
- Search for a Form
Banner Saves Your Forms!

[Image of a menu with options like Direct Access, Object Search, QuickFlow, Select, Rollback, Save, Refresh, Print, Exit, Exit QuickFlow, Exit Banner, Return to Menu, Preferences, EWMPROF USERID Local Attribute Maintenance, EUVPROM User Profile List, QUAUPRF General User Preferences Maintenance]
Status Line

In this example, from the Banner General Menu, the message is asking you to “Enter the object name” … or enter a form name.

If you were looking for information about an employee, using the FWMPROF form, the Status Line might look like this:

If your Query was successful, you’d see the next instruction:

If your Query was unsuccessful, you’d see:
Hands on

- Exercise 1
FIS Banner Form Parts

- Drop Down Menu Bar
- Tool Bar
- Title Bar
- Header Block
- Hint Text
- Status Line
Banner Form Naming

Finance System
Purchasing Module
Inquiry Form
Form Code Name
(Requisition)

F  P  I  REQ N
**FOAPAL Codes**

<table>
<thead>
<tr>
<th>BANNER:</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>F O A P A L</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Example:** 68990 680300 001010 68 QMTRDC

**Fund:** uniquely identifies all sources of funding
**Organization:** unit of budgetary responsibility; eg College office
**Account:** Expenditures, Revenues, Transfers, Assets, Liabilities, Fund Bal.
**Program:** function categories; eg Instruction, Research, Student Serv.
**Activity:** user defined; for cost center accounting
**Location:** building; reserved for future use

*The combination of Fund, Organization, Account and Program codes are required on expenditure, revenue, and transfer transactions.*
Elements/Concepts of a Form

- Blocks

- Fields
  - Required fields
  - Default fields
  - Optional fields

- Records

Multiple windows are required when information won’t fit in a single window. Only one window is active at a time.
Form Functions/Navigation

- **Blocks**
  - Next - [Ctrl Page Down]
  - Previous - [Ctrl Page Up]

- **Fields**
  - Next - [TAB]
  - Previous - [Shift TAB]

- **Records**
  - Next - [↓]
  - Previous - [↑]
Hands on

- Exercise 2
How do I Query???

- **Check Enter Query in Status Line:** Search forms open in Query Mode
- **List of Values:** Enters the Query or Find form
- **Enter Query:** Enter criteria using wildcards [%_ ] to limit the search.
- **Execute Query:** Displays all matching records.
- **Exit with Value:** Select the value and bring the record back to your working form.

Use Query Pull-Down Menu, Icons, or Keyboard
Locate Queryable Fields

Query Fields are searchable by clicking the Search Icon or by keying F9 - List of Values
Enter Query Criteria

Include Wildcards % and _ to broaden your search

Check Hint Text for Helpful Hints
Execute (Run) Query

Query Results appear as single or multiple returned records.
Query Using Wildcards

Two wildcards

_ represents one alpha-numeric character

% represents any number of alpha-numeric characters

Can be used many times in one search
**Query Using Wildcards**

**Examples**

- `%ma%`  All entries containing `ma`
- `ma%`  All entries beginning with `ma`
- `%ma`  All entries having `ma` as the final two characters
- `_m%`  All entries that have `m` as the second character
How do I Find?

Find forms open in query mode with wild card displaying.

As you enter letters, your search narrows automatically.
LOV – Find vs. Inquiry Form

- **Find Form**
  - values automatically display
  - opens in query mode
  - starts with a wildcard (%)
  - not case sensitive

- **Inquiry Form**
  - fields may be blank if opens in query mode
  - case sensitive
Hands on

- Proficiency Exercise
- Class Evaluation

Complete and turn in both sheets