

FIS Banner Navigation and Query



Training Format

- *Lecture*
- *On-Line Demonstration*
- *Exercises*
- *Questions and Answers*

Topics

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

Introductions

- *Lab rules*
- *Handouts*
- *Equipment Adjustments*

What should I know?

- *Working knowledge of MS-Windows*
- *Ability to use a mouse*

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.

ADS
Alumni
Development
System

Banner

Application Software - access, inquire, enter data, reports

Oracle

Relational Database - stores, retrieves and modifies data

System Overview

ORACLE stores data in tables.

each column is a field

	Co1-field	Co2-field	Co3-field
<i>each row is a record</i>	Row1-record Name	City	State
	Row2-record Name	City	State

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***
 - ◆ *Tab or mouse to enter your password*
- ***Your logon is your signature – keep it private***
 - ◆ *Recommend changing every 90 days*
- ***Selecting or changing passwords***
 - ◆ *Refer to FIS Manual*

UC SANTA CRUZ Financial Information System

[Home](#) [User ID / Password](#) [Contact Us](#)

Search Dept.

Financial Information Systems
UC Santa Cruz
2300 Delaware
University of California
Santa Cruz, CA 95064
Mailstop: Accounting
Email: fis_probs@ucsc.edu

[FIS 7.0 Features](#)

[Workstation Configuration](#)

[FIS Manual](#)

[FIS Known Issues Coming Soon](#)

[How to Login to FIS](#)

Other UCSC Links:

[Business Object Infoview](#)

[CruzBuy](#)

[Data Warehouse](#)

[Financial Affairs](#)

[Information Technology Services](#)

[Purchasing](#)

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fis_probs@ucsc.edu

FIS Production



[Click here to enter FIS](#)

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



FIS User Train

For help logging into the FIS User Train database, please email fis_probs@ucsc.edu

ANNOUNCEMENTS

02/13/2008
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.

UC SANTA CRUZ

Financial Information System

Important: Do Not Close This Window!



This browser window is connected to your FIS session. Closing it or using it to navigate to another website will cause your FIS session to close. Once you exit FIS, you can close this window.

Window

Logon

Username:

Password:

Database: BPRD

*Type in
User ID*

*Type in
Confidential
Password*

Hands on

- *Exercise 1*



FIS Banner Form Parts

*Drop Down
Menu Bar*

Tool Bar

Title Bar

*Header
Block*

*Hint Text
Status Line*

The screenshot shows a window titled "FIS Banner - UTRN: Open > FPIREQN". The menu bar includes "File", "Edit", "Options", "Block", "Item", "Record", "Query", "Tools", and "Help". The tool bar contains various icons for file operations and navigation. The title bar displays "Requisition Inquiry: Document Information FPIREQN 7.3.0.1 (UTRN)".

The form contains the following fields and controls:

- Requisition:** R0003450
- Order Date:** 19-JUL-1995
- Delivery Date:** 30-JUL-1995
- Commodity Total:** 89.14
- Transaction Date:** 19-JUL-1995
- Comments:** (empty)
- Accounting Total:** 89.14
- In Suspense
- Document Text
- Complete
- Approved
- Print Date:** (empty)
- Activity Date:** 24-JUL-1995
- Cancel Date:** (empty)
- Closed Date:** (empty)
- User ID:** OPS\$TRAIN49
- Cancel Reason:** (empty)
- Document Type:** P PROCUREMENT
- NSF Checking
- Deferred Editing
- Requisition Copied From:** (empty)
- Origin:** BANNER
- Reference Number:** (empty)

The status line at the bottom shows "Record: 1/1" and "<OSC>".

Banner Form Naming

Finance System

Purchasing Module

Inquiry Form

*Form Code Name
(Requisition)*

F P I R E Q N

FOAPAL Codes

UCSC BANNER FIS CHART OF ACCOUNTS

BANNER:	Fund	Organization	Account	Program	Activity	Location
	F	O	A	P	A	L
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***

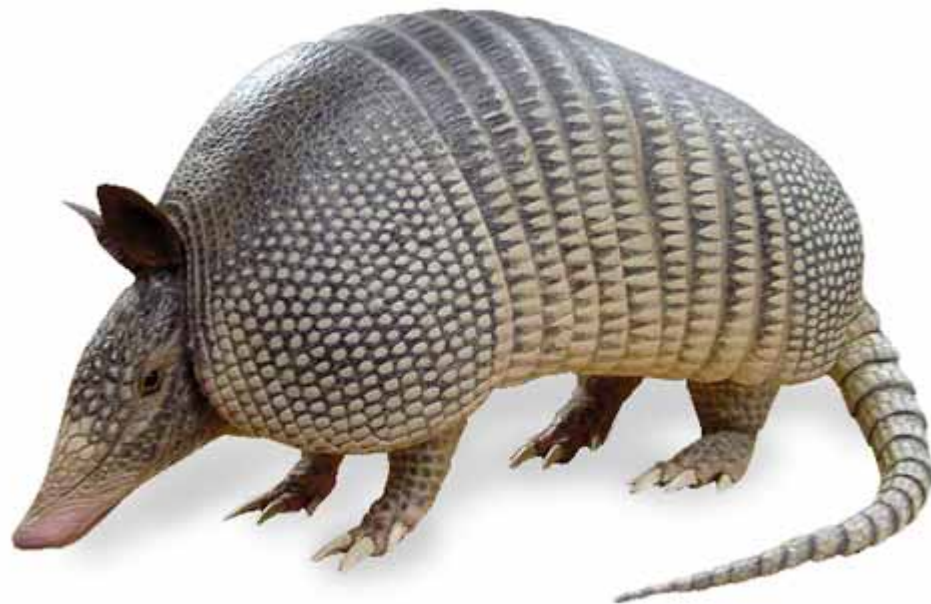
*Multiple windows are required when information won't fit in a single window.
Only one window is active at a time.*

Form Functions/Navigation

- ***Blocks***
 - ◆ *Next* - [Ctrl PageDown]
 - ◆ *Previous* - [Ctrl PageUp]
- ***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

The screenshot shows the FIS Banner - UTRN: Open > FOIDDOCH application window. The menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, and Help. The toolbar contains various icons for navigation and actions. The main window displays a grid of document type panels, each with a 'Document Type' label, a 'Document Code' field, and a 'Status' dropdown menu. The 'Document Type' is set to 'REQ' (Requisition) and the 'Document Code' is 'R0003450'. The panels include:

- Requisition: Document Code: R0003450, Status: A
- Bid: Document Code: (empty), Status: (empty)
- Purchase Order: Document Code: P0003540, Status: A
- Issues: Document Code: (empty), Status: (empty)
- Invoice: Document Code: (empty), Status: (empty)
- Check: Document Code: (empty), Status: (empty)
- Return: Document Code: (empty), Status: (empty)
- Receiver: Document Code: Y0003280, Status: C
- Asset Tag: Document Code: (empty), Status: (empty)
- Asset Adjustment: Document Code: (empty), Status: (empty)

At the bottom of the window, there is a status bar with the text: 'Press F3 to drill down to source document; navigate to the Options Menu to view Status Indicators. Record: 1/1 | | ... | | <OSC>'.

Enter Query Criteria

Enter Query Criteria.

*Include Wildcards
% and _
to broaden your
search*

The screenshot shows a software window titled "FIS Banner - UTRN: Open > FOIDOCH - FPIRQST". The window contains a form for entering query criteria. The form is organized into three identical sections, each with the following fields:

- Request Number
- Requestor Name
- Request Date
- Request Type (with sub-fields for Completed and Approved)
- Deliver by Date
- Organization
- Vendor
- Origin (dropdown menu)
- Reference Number

Blue arrows from the text on the left point to the "Requestor Name" field in the top section and the status bar at the bottom of the window. The status bar contains the text: "Enter a query; press F8 to execute, Ctrl+Q to cancel." and "Record: 1/1 | Enter-Qu... | <OSC>".

*Check Hint Text
for Helpful Hints*

Execute (Run) Query

Query Results appear as single or multiple returned records

The screenshot displays the FIS Banner interface for requisition validation. It shows three records returned by a query, each with a unique Request Number. The records are as follows:

Request Number	Requestor Name	Request Date	Request Type	Deliver by Date
R0003017	Manager Test #1	17-JUL-1995	P	30-JUL-1995
R0003450	Manager Navigation #1	19-JUL-1995	P	30-JUL-1995
R0003530	Manager Training #1	23-JUL-1995	P	25-JUL-1995

Each record also includes fields for Organization (PORTER COLLEGE), Vendor (University Art Center, Office Depot Inc, Chemglass Inc), Completed status (Y), Approved status (Y), Origin (BANNER), and Reference Number.

At the bottom of the window, a status bar indicates: "Press COUNT QUERY HITS for Requisition Query, BLOCK MENU for Review Commodities. Record: 1/3".

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

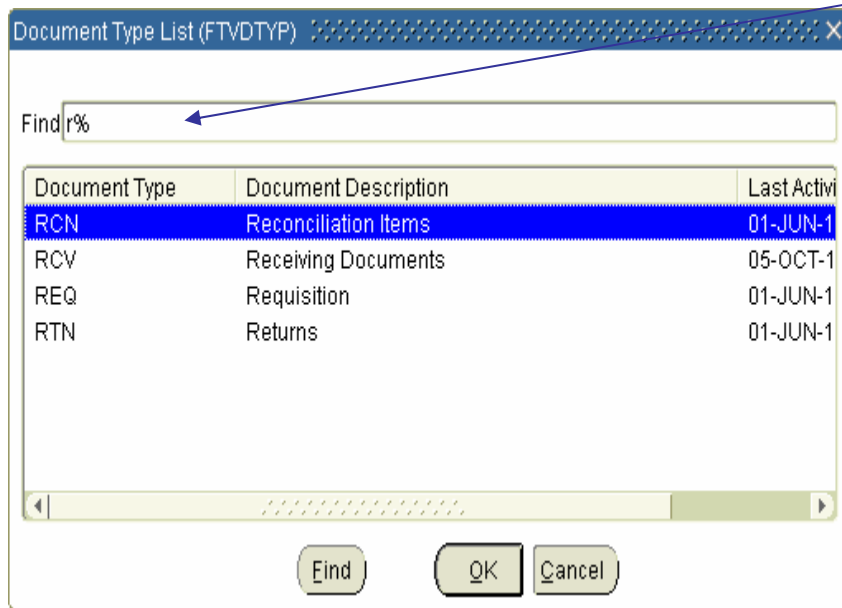
Query Using Wildcards

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.



The screenshot shows a window titled "Document Type List (FTVD TYP)". At the top, there is a search field labeled "Find" containing the text "r%". Below the search field is a table with three columns: "Document Type", "Document Description", and "Last Activ". The table contains the following data:

Document Type	Document Description	Last Activ
RCN	Reconciliation Items	01-JUN-1
RCV	Receiving Documents	05-OCT-1
REQ	Requisition	01-JUN-1
RTN	Returns	01-JUN-1

At the bottom of the window, there are three buttons: "Find", "OK", and "Cancel". A blue arrow points from the text on the right to the search field.

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

- *Exercise 3*



Hands on

- *Nav/Query Exercise Sheet*



Hands on

- *Proficiency Exercise*
- *Class Evaluation*

Complete and turn in both sheets

The End

