

WELCOME TO FIS BANNER

Navigation & Document Query

FIS Banner WebSite Help

FIS Launch Page	http://fis.ucsc.edu
FIS System Guide	http://financial.ucsc.edu/Pages/Systems_FISGuide.aspx
FIS Banner Manual	http://finaff.ucsc.edu/banner
Purchasing	http://purchasing.ucsc.edu
Workstation Setup	http://fis.ucsc.edu/workconfig.html
FIS Training	http://financial.ucsc.edu/Pages/TrainingFIS.aspx

Class Outline - 1:00 to 4:30

- Welcome
- Ergonomics
- Overview of FIS BANNER
- Logging on / off
- Accessing BANNER Forms
- BANNER Form Functions and Navigation
- *Exercises*
- Queries using FOIDOCH (Document History Screen)
- *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 a Logon: 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 Forms:

1. Account Modification Form
2. Access to Information Statement
3. UCSC FIS Access Request Form

Subscribe to fis_user at <http://finaff.ucsc.edu/fis/fisuser.htm>

INQUIRY FORM	Description
FOIDOCH	Document History Form (Acquisition Transaction Forms)
FPIREQN	Requisition Query Form
FPIPURR	Purchase Order Query Form
FAIVNDH	Vendor Detail / History Form
FPIOPOV	Purchase Order by Vendor Form
FOAAINP	Documents in Approval Form
FAIINVE	Invoice/Credit Memo Query Form
FGIJSUM	Journal Voucher Summary Form
FGIBDST	Organization Budget / Financial Status Form

FIS BANNER Navigation Workbook

Contents

CONTENTS	III
FIS BANNER NAVIGATION: OVERVIEW	1
INTRODUCTION	1
BANNER OVERVIEW	1
<i>Definition of Terms</i>	1
<i>System Overview</i>	2
<i>Logging On</i>	3
FIS BANNER NAVIGATION: BASICS	5
LESSON 1	5
INTRODUCTION TO BANNER BASICS	5
<i>Lesson Objectives</i>	5
<i>Overview</i>	5
<i>Exercise 1a: Menus</i>	9
<i>Exercise 1b: Direct Access</i>	12
FIS BANNER NAVIGATION: FORM BASICS	14
LESSON 2	14
INTRODUCTION TO BANNER FORM BASICS	14
<i>Lesson Objectives</i>	14
<i>Overview</i>	14
<i>Forms Overview</i>	14
<i>Banner Form Naming</i>	17
<i>Document Level vs Commodity Level Accounting</i>	18
<i>FOAPAL Codes</i>	18
<i>Exercise 2: Navigating within Blocks</i>	19
<i>Self-test Review 2: Navigating a Form</i>	23
FIS BANNER NAVIGATION: QUERY	25
LESSON 3	25
QUERYING A FORM	25
<i>Lesson Objectives</i>	25
<i>Overview</i>	25
<i>Query Forms</i>	26
<i>Wildcards</i>	26
<i>Find Forms</i>	28
<i>Find vs Query Forms</i>	28
<i>Exercise 3: Query using Find and Search Forms</i>	29
<i>Self-test Review 3: Querying a Form</i>	32
TABLE BY FUNCTION	33

Introduction

Banner Overview

The Banner **Financial Information System (FIS)** is a financial data management and reporting system designed to help you store, report, and analyze daily business operations.

Definition of Terms

It is helpful, when traveling in Bannerland, to speak the language. Here are some useful terms:

Form - Forms contain one or more pages or screens. Forms are divided into blocks where all the information is entered. They contain these additional helpful components: Menu Bar, Tool Bar, Title Bar, Information (Block) Areas, and Auto Hint / Status Line. Functional (Application) Forms are used for data entry and query, while query forms are used only to query the system for information. The most important parts of a form are the blocks, fields, and records.

Block - Blocks are the information areas on a form, the major component out of which a Banner form is made. Groups of related fields compose a block. Fields logically grouped together are called records. Blocks may contain several records.

Key Block - The key block appears at the top of each form and indicates what is required to bring data into the form, or what codes are required to prepare the form for data entry.

Field (Item) - Fields are the areas in a window where you enter, query, or change information and where existing information is displayed. They are either enabled or disabled (grey) and either enterable or display only.

Record - Fields that are related to each other form a record. For example, there are multiple commodity records in a Purchase Order form for the purchase of several types of goods.

Query - Query is the process of searching for and obtaining data from Banner. You query to find out what information belongs in any field that draws data from a validation table. You can also use queries to pull up documents or to determine the status of a specific document.

Dialog Box - Dialog boxes are designed to help you complete functions. A dialog box may appear when you try to exit a form without saving your changes. You must respond to a dialog box before you can do anything else.

System Overview

Banner is a user interface program operating between you, the database, and the computer. It runs on a database management system called **Oracle**. The foundation for Banner, Oracle is the software that sorts, updates, adds, and deletes data.

Banner uses a graphical user interface (GUI) with a navigation structure very similar to Microsoft Windows. We use a "client-server" model, where the data lives on one system (called the "database server") and the forms live on another system (called the "forms server"). This spreads the load between two powerful systems so neither bogs down the other. If you need assistance setting up your workstation for running Banner consult with your unit's local computing coordinator. If you do not have a computing coordinator you may call the ITS Information Resource Center (ext. 9-4357) for further assistance.

Oracle, the FIS database, stores information in tables that are made up of columns and rows. Each column is a field and the column heading is the field name, which is usually descriptive of the data contained in that column. Each row is a record that contains the information for each entry in the table.

For example, the information from an address book might be stored in a table where each person is listed in a row. The pieces of information related to a person are stored in fields called Name, Address, City, State, ZIP, and Phone.

Logging On

New users need to complete three forms:

- the UC Access to Information Statement,
- the ITS New Account Application (w/supplement), and
- the FIS Access Request Form.

Links and information about these forms can be found here:

http://financial.ucsc.edu/Pages/Systems_FISGuide.aspx#get. Submit the completed forms to the ITS Information Resource Center (IRC). The IRC will setup your basic user account. After this account is setup, the IRC forwards the FIS Access Request Form to FIS Security. FIS's security analyst will monitor and fulfill the request. After completing the request, the security analyst will notify you via email that your password is available at the IRC.

To access Banner, you must log on to <http://fis.ucsc.edu>

- Log on using the Production (Slug) icon
- Remember to keep the "Stop Sign" back up page open while you are working in Banner.

These accounts identify you and regulate what you have permission to do on the computer system. Each account has a unique name referred to as the username (or login ID). Remember: your logon is your signature – keep it private. An individual who shares his/her ID is responsible for any transactions, whether willful or accidental, entered into the system. Refer to the FIS Manual for information on selecting or changing passwords.

Lesson 1

Introduction to Banner Basics

Lesson Objectives

Upon completion of this section, you will be able to:

- Log on and log out of a Banner session
- Navigate using the system menu
- Enter a form using the menu
- Enter a form using direct access
- Exit a form

In this lesson you will use the Main Menu (GUAGMNU) and Direct Access.

Overview

This workbook provides information on some of the main features of FIS Banner. Please see the FIS Manual for detailed information.

Menu Navigation

Banner allows multiple paths to the same location. You select the method.

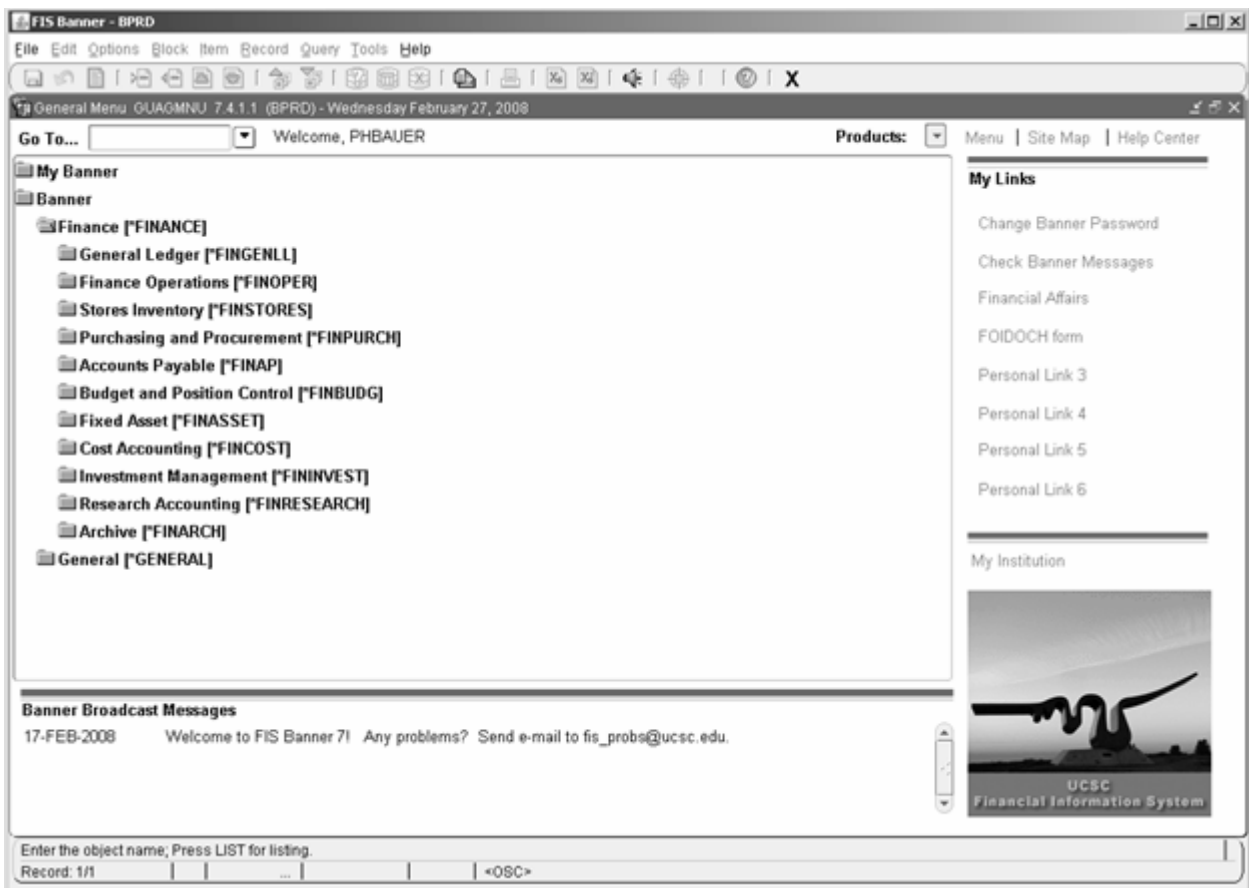
The main menu is the starting point for navigating through Banner. All Banner forms run in a window - a framed area on your screen. All forms are accessed and navigated using a mouse or keystrokes.

After you log in to Banner, the main menu appears with a familiar Window's format.

The banner Menu Form displays two frames after successfully logging into Banner. Think of these as a table of contents to be used to access a submenu, form, or job.

The menu bar's drop-down menus list common functions, including many that can be used for navigation. The tool bar contains icons representing common functions used to navigate within forms. The Title Bar displays the name of the database and the current form.

When you enter the Main Menu, the Go field is the current active field. Enter the seven-character Banner form code name and hit Enter to go directly to that form.



FIS Banner opens with the Finance Menu automatically deployed. It will be highlighted in blue.

Select a menu for the area on Finance you want to work in and click on it. Items in this menu appear below this title.

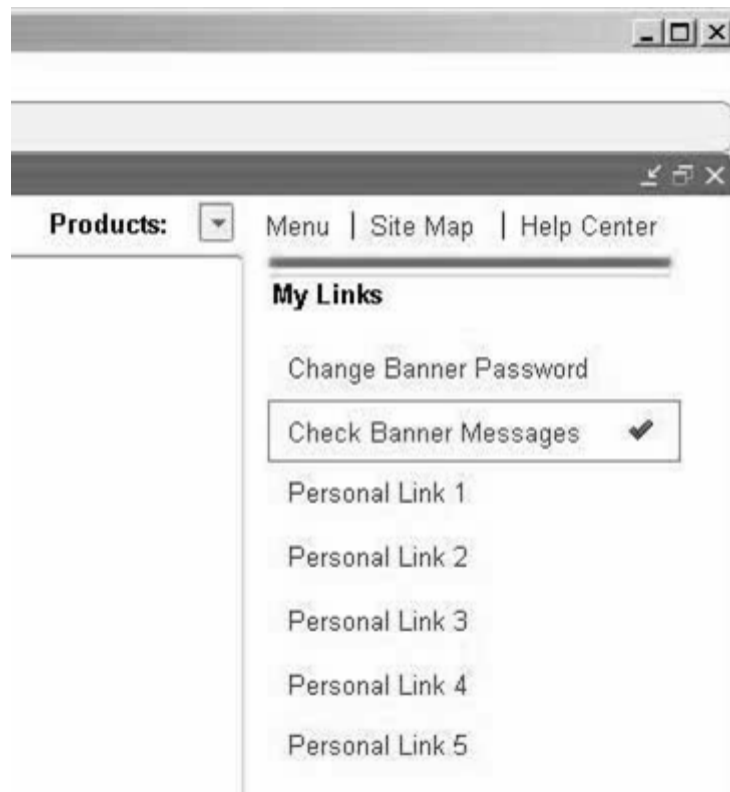
The full text form name and the seven-character Banner form name are displayed. Click either name to enter a form.


To exit a menu item or a Banner session:
Click on the **Exit Icon** in the toolbar, enter **[Cntl+Q]**,
or Right Click - Exit.

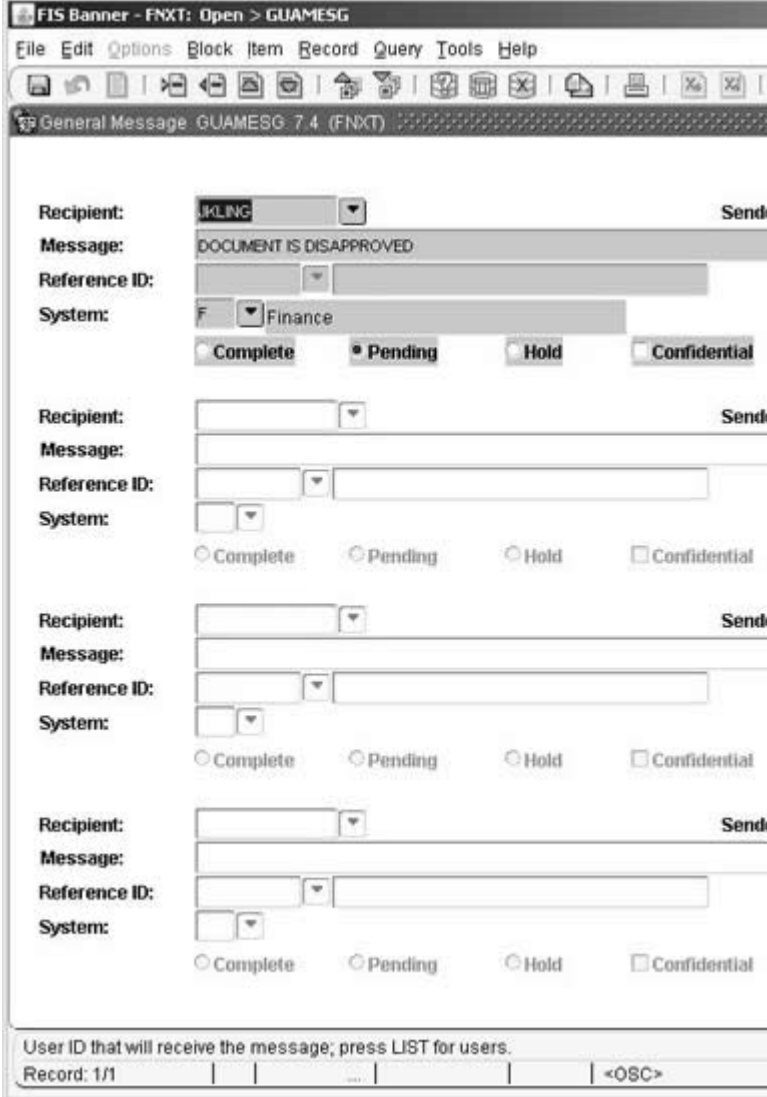
Messages

The FIS Banner Messaging System automatically communicates the status of documents to users of the system.

When you log in to FIS Banner, if you have any messages, a green check mark will appear next to "Check Banner Messages" in the "My Links" section of the General Menu.



After viewing your message(s), type [shift F6] Delete Record from the record you wish to delete. You must also save before you exit for the messages to be completely deleted. Right-click anywhere on the window and select "Save", key F10, click on the Save toolbar icon  or go Menu: File and select "Save".



The screenshot shows the FIS Banner - FNXT: Open > GUAMESG 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 area displays a "General Message: GUAMESG: 7.4 (FNXT)".

The message details are as follows:

- Recipient: [dropdown menu with 'JIKLING' selected] Send
- Message: DOCUMENT IS DISAPPROVED
- Reference ID: [dropdown menu]
- System: F [dropdown menu] Finance
- Status: Complete Pending Hold Confidential

Below this, there are three identical empty forms for editing or adding new messages, each with the same fields: Recipient, Message, Reference ID, System, and Status options.

At the bottom, there is a status bar with the text: "User ID that will receive the message; press LIST for users." and "Record: 1/1" followed by a table with columns and a "<OSC>" button.

Exercise 1a: Menus



In the following exercise, you will expand and collapse the menu to enter and exit a form.

What you do

1. Enter Banner.
2. Expand the Purchasing and Procurement System Menu in the left pane by clicking on the folder or the name.
3. Next expand the Request Processing Menu.

Note the selected menu name displays blue. The associated menus and forms display below it.

Comments/Prompts

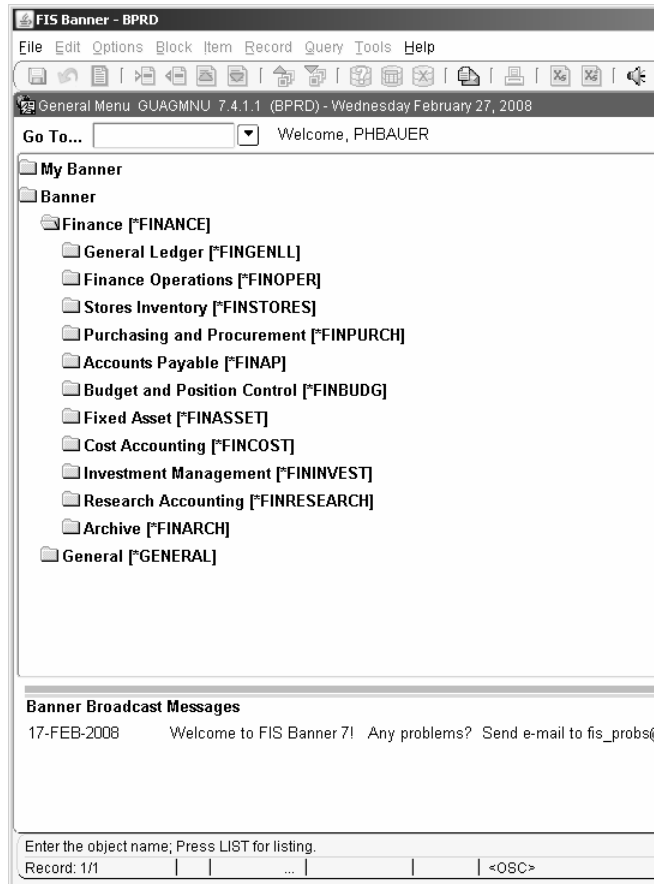
The screenshot shows the FIS Banner application window. The title bar reads "FIS Banner - BPRD". The menu bar includes "File", "Edit", "Options", "Block", "Item", "Record", "Query", "Tools", and "Help". The status bar at the top indicates "General Menu GUAGMNU 7.4.1.1 (BPRD) - Wednesday February 27, 2008". Below the status bar is a "Go To..." field and a "Welcome, PHBAUER" message. The main area is a tree view under "My Banner" with the following structure:

- My Banner
 - Banner
 - Finance [*FINANCE]
 - General Ledger [*FINGENLL]
 - Finance Operations [*FINOPER]
 - Stores Inventory [*FINSTORES]
 - Purchasing and Procurement [*FINPURCH]
 - Accounts Payable [*FINAP]
 - Budget and Position Control [*FINBUDG]
 - Fixed Asset [*FINASSET]
 - Cost Accounting [*FINCOST]
 - Investment Management [*FININVEST]
 - Research Accounting [*FINRESEARCH]
 - Archive [*FINARCH]
 - General [*GENERAL]

Below the tree view is a "Banner Broadcast Messages" section with a message dated 17-FEB-2008: "Welcome to FIS Banner 7! Any problems? Send e-mail to fis_probs@...". At the bottom, there is a prompt "Enter the object name; Press LIST for listing." and a record indicator "Record: 1/1" with a "<OSC>" button.

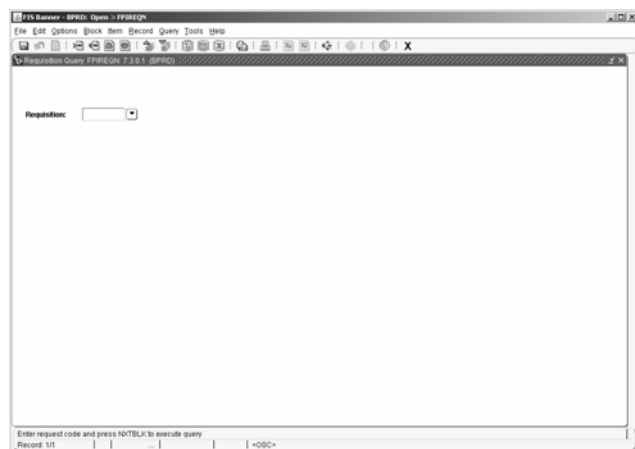
4. Click on the Requisition Query Form, FPIREQN, located in the right pane.

You can click on the description, or the Banner form name.

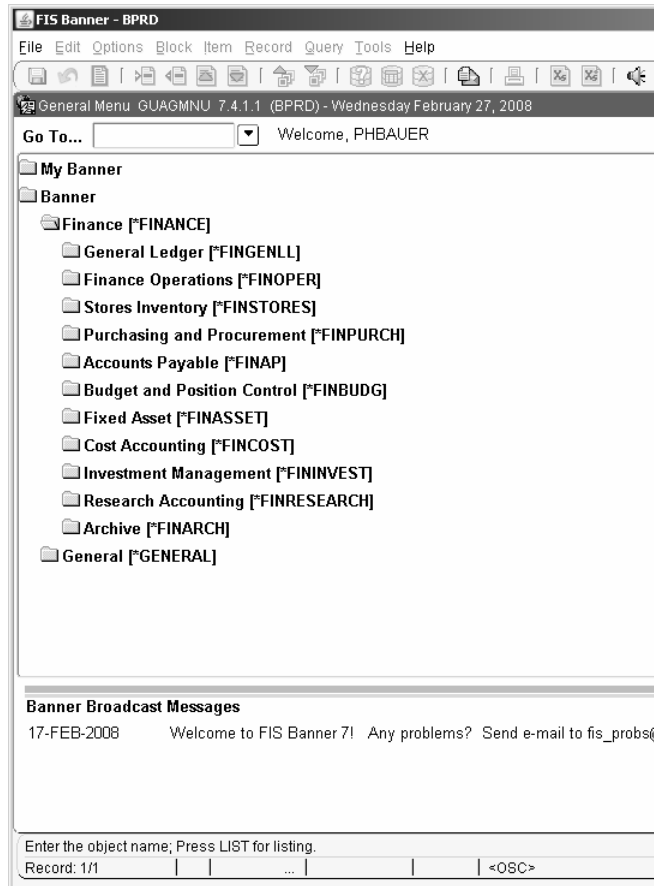


You are now in the form.

5. To exit the form, click the Exit icon on the toolbar, Right Click - Exit, or enter **Exit [CNTL+Q]**.



6. Click on the Purchasing and Procurement System Menu to collapse the menu.



Exercise 1b: The Go To... Box for Direct Access



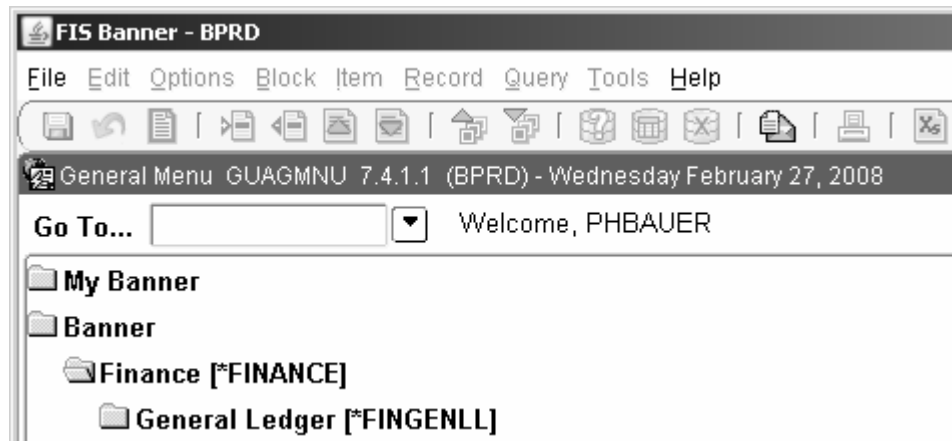
In the following exercise, you will enter a form using the GO Box.

What you do

Comments/Prompts

1. Type the form name FPIREQN in the GO Box and press Enter.

You go directly into the named form.



2. To exit the form, click the Exit icon on the toolbar, Right Click - Exit, or key **[CNTL+Q]** Exit.

You have entered a form by expanding the System Menu and by entering a form name in Direct Access.

Congratulations!

You have completed Lesson 1 of the Navigation Workbook!

Lesson 2

Introduction to Banner Form Basics

Lesson Objectives

Upon completion of this section, you will be able to:

- Determine your location using the Title Block
- Understand the form basics
- Navigate through a Banner form

Overview

This workbook provides information on some of the main features of FIS Banner. Please see the FIS Manual for detailed information.

Forms Overview

All Banner forms run in a window and contain the following components:

Menu Bar (dropdown)
Tool Bar
Form Title Bar

Key Block

The screenshot displays the FIS Banner software interface for a Requisition Inquiry. The window title is "FIS Banner - BPRD: Open > FPIREQN". The menu bar includes "File", "Edit", "Options", "Block", "Item", "Record", "Query", "Tools", and "Help". The toolbar contains various icons for navigation and actions. The form title bar reads "Requisition Inquiry: Document Information FPIREQN 7.3.0.1 (BPRD)".

The main form area contains the following fields and controls:

- Requisition:** 80156497
- Order Date:** 06-NOV-2003
- Delivery Date:** 14-NOV-2003
- Commodity Total:** 4200.13
- Transaction Date:** 06-NOV-2003
- Comments:** (empty field)
- Accounting Total:** 4200.13
- In Suspense
- Document Text
- Complete
- Approved
- Print Date:** (empty field)
- Activity Date:** 06-NOV-2003
- Cancel Date:** (empty field)
- User ID:** PHALL
- Closed Date:** 19-NOV-2003
- Cancel Reason:** (empty field)
- Document Type:** PROCUREMENT
- NSF Checking
- Deferred Editing
- Requisition Copied From:** (empty field)
- Origin:** BANNER
- Reference Number:** (empty field)

At the bottom of the window, there is a status line that reads "Record: 1/1" and navigation controls including "<08C>".

Auto Hint/Status Line

The **Menu Bar** provides drop-down menus where you select specific functions. To access an option on the menu bar, click on the desired pull-down menu name. Click on the desired menu item.

The **Title Bar** is located under the tool bar at the top of each form. It identifies the form and displays the following information:



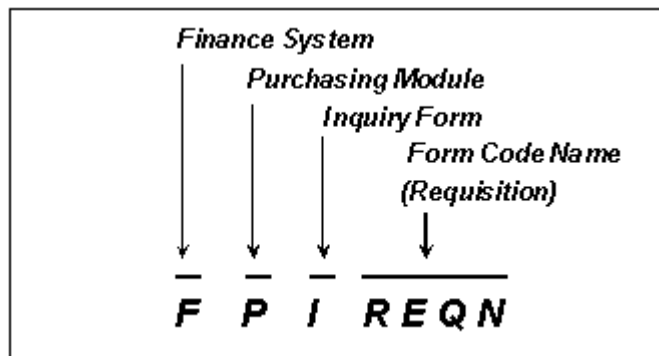
FORM Description FORM Name Version of Banner (Database)

Forms are organized into **blocks** or areas of related information. Forms usually consist of a Key Block, one or more Information Blocks, and a Completion Block. A solid line often marks the top and bottom of each block. Information from the Key Block is repeated as the first block of each page of the record. Within blocks are **fields**. Fields logically grouped together are called **records**.

The **Auto Hint / Status Line** runs across the bottom of the screen. It provides brief online help about the field where the cursor is located. This information may explain the purpose of the field, what can be done next, or how to move to another window or form. Error messages also appear here.

Banner Form Naming

You can learn the ownership, type, and use of any form, such as the requisition form, FPAREQN, by learning the meaning of each character in its name.



All Banner forms have seven-letter code names which use the following convention: **1234444**.

1. The first letter refers to the system
2. The second letter is a code for the module
3. The third letter is a code for the form type
4. The last four letters are unique abbreviations of the form name

Document Level vs Commodity Level Accounting

In Banner, Finance, Requisitions, Purchase Orders, Invoices, and Journal Vouchers are called **documents**.

Document level accounting allows you to use one or more funding sources to pay for the commodities on a document by a percentage (or other distribution) of the **document total**. Document Level accounting is more commonly used than Commodity Level accounting.

Example:

1st Commodity (plus)
 2nd Commodity (plus)
 3rd Commodity (= total charge)

paid by

1st FOAPAL (100%)
 or
 1st FOAPAL (75%) and 2nd FOAPAL (25%)
 or
 1st FOAPAL (\$partial amount) and 2nd FOAPAL (\$balance)

Commodity level accounting allows you to assign one or more FOAPALs to **each specific commodity**. In this case, you would change the DOC Level Accounting field in your document to "N" to activate commodity level accounting.

Commodity level accounting must be used when you order inventorial items. Commodity level accounting would be used, for instance, to purchase inventorial equipment and components for existing equipment on one document.

Example:

1st Commodity paid by 1st FOAPAL (100%)
 2nd Commodity paid by 2nd FOAPAL (100%)
 3rd Commodity paid by 2nd FOAPAL (50%) and by 3rd FOAPAL (50%)

FOAPAL Codes

UCSC BANNER FIS CHART OF ACCOUNTS

The combination of Fund, Organization, Account and Program codes are required on expenditure, revenue, and transfer transactions.

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

Exercise 2: Navigating within Blocks

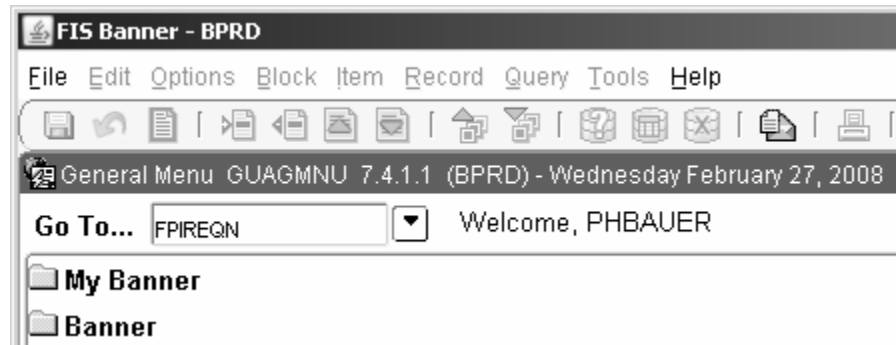


In the following exercise, you will navigate through the Banner blocks using the Requisition Form (FPIREQN).

What you do

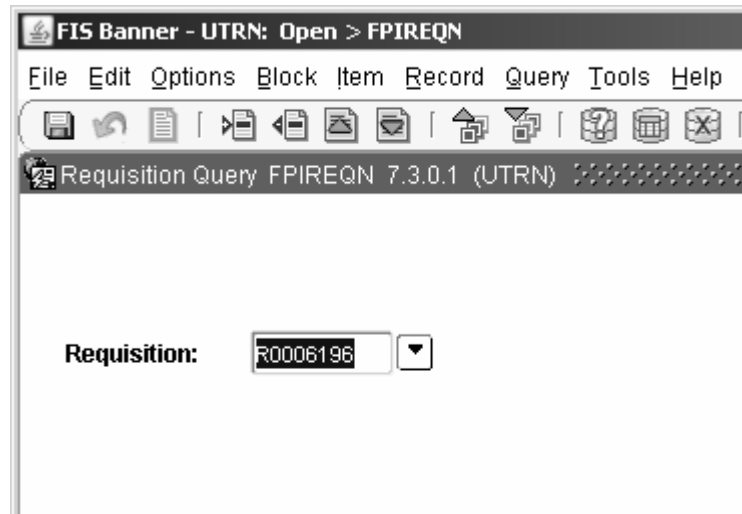
Comments/Prompts

1. Enter Banner, then enter the form name **FPIREQN** in the GO To... Box



2. Enter **"R0006196"** in the REQUISITION field.

3. Enter **Next Block** or select **Menu: Options: Document Information** to display (populate) the first block of the form.



4. Select
Menu: Options:
Document Text to enter FOAPOXT and view the Document text. It is also called Header Text.

To exit the form, click the Exit icon on the toolbar, Right Click - Exit, or key **[Control + Q]** exit.

Now we'll go through the blocks. Review the information on each page as it displays.

The screenshot shows the FIS Banner - UTRN: Open > FPIREQN application window. The title bar includes 'File Edit Options Block Item Record Query Tools Help'. The main window displays a requisition inquiry form with the following fields and values:

Requisition:	P0006198	Transaction Date:	07-JAN-1997	<input type="checkbox"/> In Suspense
Order Date:	07-JAN-1997	Comments:		<input checked="" type="checkbox"/> Document Text
Delivery Date:	07-FEB-1997	Accounting Total:	5274.50	
Commodity Total:	5274.50			

Below these fields are several checkboxes and date fields:

<input checked="" type="checkbox"/> Complete	<input checked="" type="checkbox"/> Approved	Cancel Date:		Closed Date:	
Print Date:		User ID:	OPSSTRAIN01		
Activity Date:	07-JAN-1997				
Cancel Reason:					

At the bottom, there are document type and origin fields:

Document Type:	P PROCUREMENT
<input type="checkbox"/> NSF Checking	<input type="checkbox"/> Deferred Editing
Requisition Copied From:	
Origin:	BANNER
Reference Number:	

5. Select
Menu: Options:
Requestor/ Delivery Information or **Next Block**.

6. Select
Menu: Options:
Vendor Information or **Next Block**.

7. Finally select
Menu: Options:
Commodity/ Accounting Information or **Next Block**.

At the Commodity/ Accounting information block, the **Menu: Options:** listing displays additional links.

Use the top right arrows to scroll through options currently not displayed.

8. Let's select **Menu: Options: Commodity Supplemental Information** to view the assigned buyer. Remember that in addition to the Close button, the Exit icon and keystroke are available.

9. **Menu: Options: Review Commodity Information** displays a commodity list. Remember to **Exit** when you enter this form.

10. **Menu: Options: Item Text** is also called Commodity Text. It displays text for the selected commodity. **Exit** the text form to return to FPIREQN.

What you do

Comments/Prompts

Now let's look at the commodities / accounting screen. The commodity block and the accounting block display on one screen. Each block may contain several records.

When commodity level accounting is used, the FOAPAL information for the selected (highlighted) commodity displays below. As you arrow through the commodity records, the related cost and FOAPAL information displays.

The screenshot shows the FIS Banner - UTRN: Open > FPIREQN window. The title bar indicates the window name and standard window controls. 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 content is titled "Requisition Inquiry, Commodity/Accounting FPIREQN 7.3.0.1 (UTRN)".

Key fields and values:

- Requisition: R0006196
- Order Date: 07-JAN-1997
- Delivery Date: 07-FEB-1997
- Transaction Date: 07-JAN-1997
- Options: In Suspense, Document Text, Document Accounting

Commodity Line Summary:

Item	UM	Tax Group	Quantity	Unit Price	Extended
1 of 3	EA		1 X	3,500.0000	3,500.00

Commodity Details:

Commodity	Description	Options
Computer CPU Model M6510A		<input type="checkbox"/> Commodity Text
Computer CPU Model M6533A		<input checked="" type="checkbox"/> Closed
Freight		<input checked="" type="checkbox"/> Item Text
		<input type="checkbox"/> Suspense

FOAPAL Summary:

FOAPAL 1 of 2 Suspense NSF Override NSF Suspense

COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	Extended
X	97		19900	402840	007020	40				3,150.00
X	97		69900	402840	007020	40				

Summary Totals:

- Commodity Line Total: 3,500.00
- FOAPAL Line Total: 3,150.00
- Commodity Accounting Total: 3,500.00

Footer: Press NEXT BLOCK to navigate to Accounting block. Record: 1/3 | ... | <OSC>

11. To exit the form, click the exit icon on the toolbar, Right Click - Exit, or key **[CNTL+Q]** Exit.

Self-test Review 2: Navigating a Form



1. Go into the form FPIPURR. Enter "**P0005442**" in the PURCHASE ORDER field. Practice going from block to block using **[Ctrl+PgDn]** or one of the other methods. Be sure to enter the text forms (both Header and Commodity). Remember when you are done viewing the text to **Exit**.
2. Go into the form FPIRCVD. Enter "**Y0003265**" in the RECEIVER DOCUMENT CODE field. Practice moving within the form.
3. Select other inquiry forms that you use and practice navigation.

You have navigated through blocks using keystrokes, icons, and drop-down menus.

You have navigated through records using the keyboard.

You have located, entered, and exited both document and item text forms.

Congratulations!

You have completed Lesson 2 of the Navigations Workbook!

Lesson 3

Querying a Form

Lesson Objectives

Upon completion of this section, you will be able to:

- Use search and find queries to locate and review information


In this lesson you will use the Document History Form (FOIDDOCH).


Overview

This workbook provides information on some of the main features of FIS Banner. Please see the FIS Manual for detailed information.

You can query Banner forms when you don't know the appropriate information to enter in a field or when seeking specific information already entered in the database. Query includes inquiry forms and most application forms. The two different types of Query screens are Search Form and Find Form.

Banner displays two different query indicators:

The Document Type field is searchable by double-clicking in the field, keying F9, or clicking on the Search icon .

The Document Code field is searchable by keying F9, or clicking on the Search icon .

Query Forms

Several forms open in query mode. These forms display the message: ENTER QUERY in the status line. A form opens in query mode when the number of records to be retrieved is so large a significant display delay may occur. Other times you will request a List of Values (LOV) to being a query.

Query steps include:

- **List of Values [F9]:** Enters the Query or Find form.
- **Enter Query [F7]:** Enters query mode allowing use of wildcards [%_] to limit the search.
- **Execute Query [F8]:** Displays all matching records.
- **Exit with Value [Shift+F3]:** Selects the value and brings the record back to your working form.

Wildcards

Wildcards stand for any alpha-numeric character. They are “_” representing only one character and “%” representing any number of characters. Wildcards can be used many times in one search. The Query search is always case sensitive, meaning that upper and lower case must match exactly.

To get these results

All entries that contain *ma*

All entries that begin with *ma*

All entries that have *ma* as the final two characters

All entries that have *m* as the second character

Enter this criteria

%ma%

ma%

%ma

_m%

Find Forms

You may, without clicking anywhere, type the letter you think begins the correct answer. Banner automatically goes to the answers that start with the letter.

Document Type	Document Description	Last Ac
ADJ	Adjustments to Inventory	11-OCT
AGR	Agreements	10-JAN
BAS	Basis Code	01-JUN
BFM	Grant Billing Format	07-MAY
BID	Request for Bid	01-JUN
BND	Bonds	21-JAN
BRQ	Budget Request	17-JUL
CCK	Check Cancellation	24-OCT

To exit with value, highlight the selected value, then type [enter], double-click, or click the OK button.

Find vs Query Forms

Find Form

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

Query Form

- fields blank if it opens in query mode
- case sensitive

Exercise 3: Query using Find and Search Forms

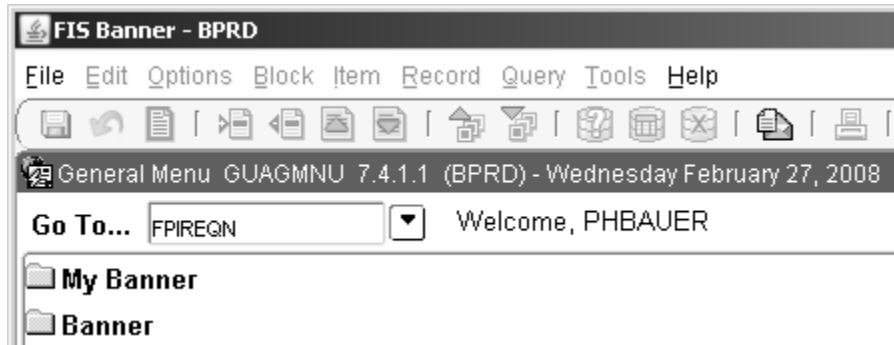



In the following exercise, you will perform both a find and a search query using the form FOIDOCH.

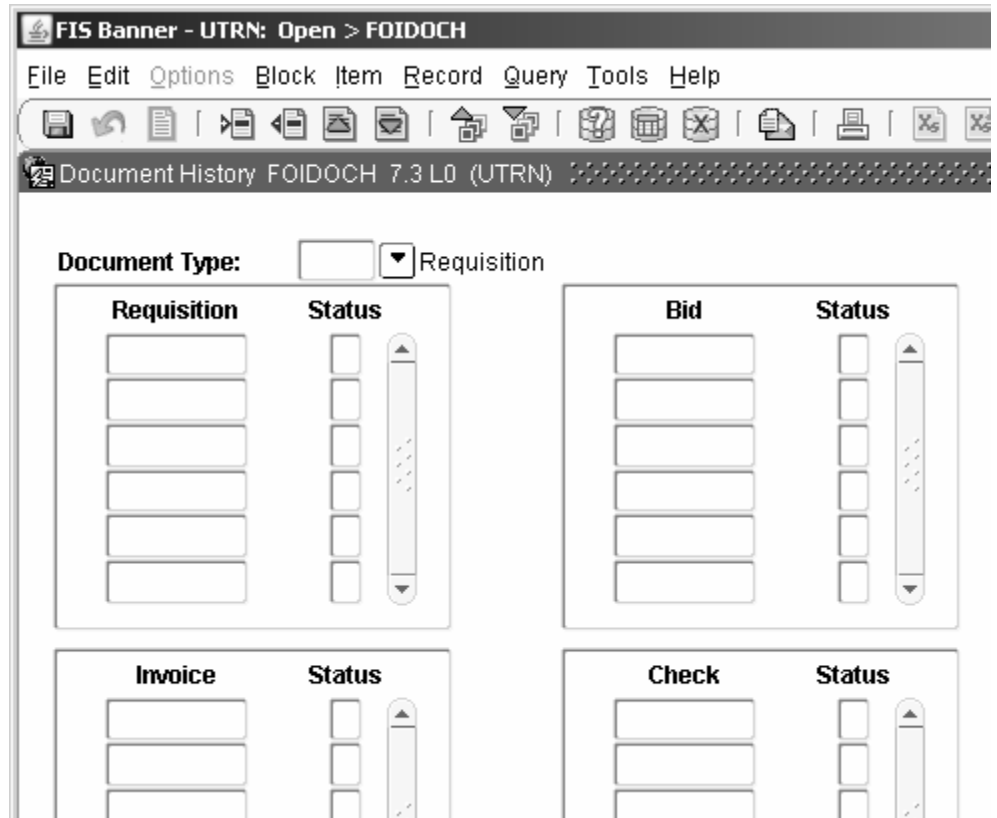
What you do

Comments/Prompts

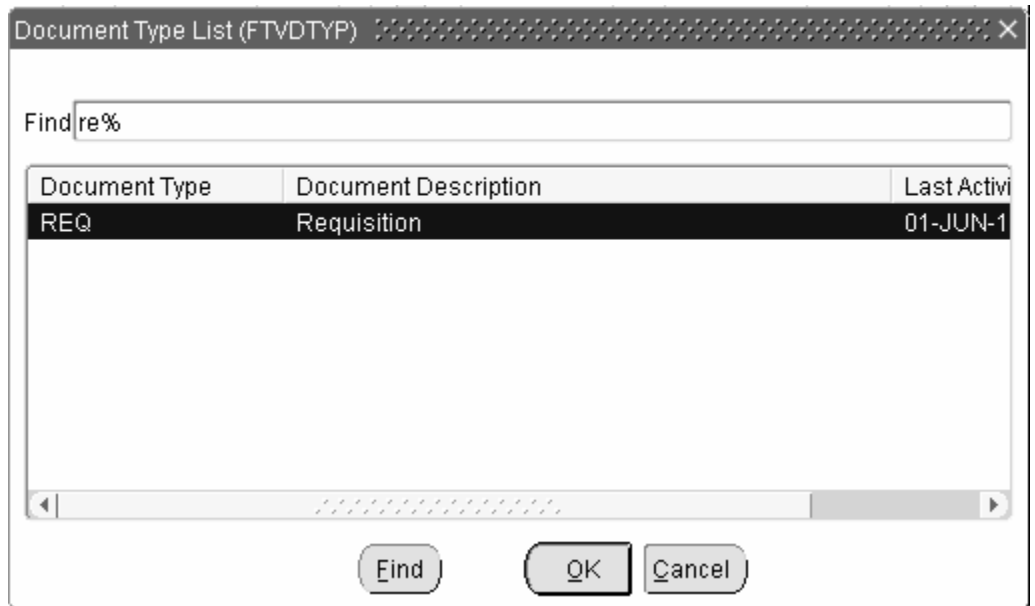
1. Enter Banner, then enter the form name **FOIDOCH** in the GO Box.




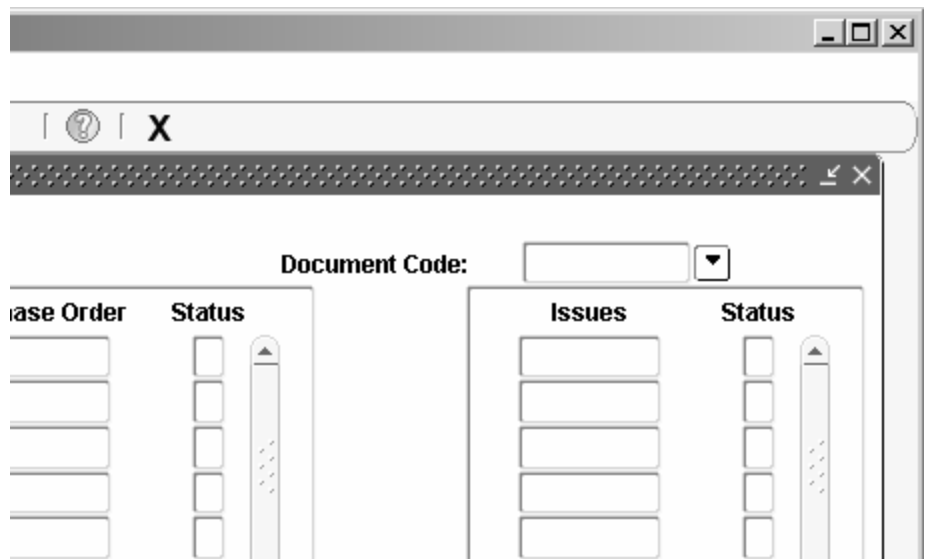
2. With your cursor in the DOCUMENT TYPE: field, double-clicking in the field, key F9, or click on the Search icon .



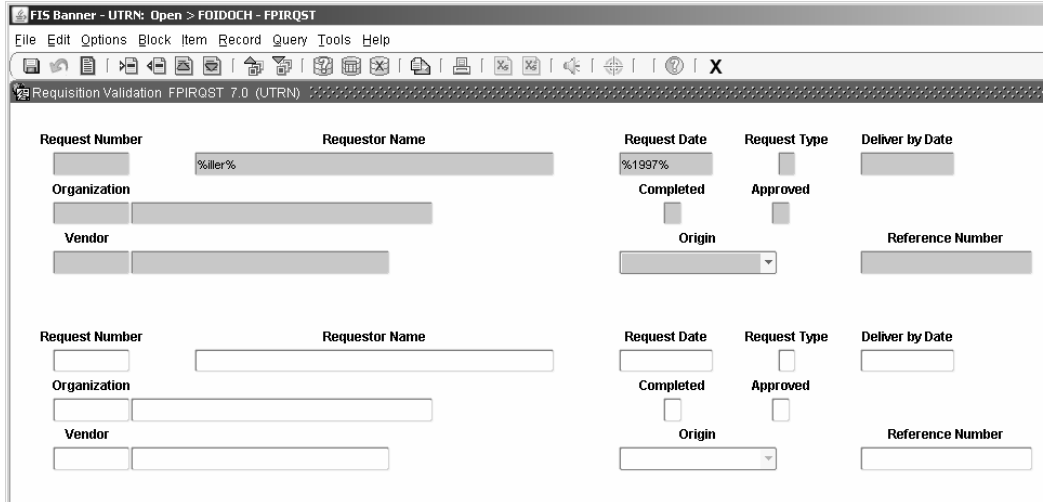
3. Before doing anything else in the Find Form, enter "re" then double-click your selection or press **[Enter]**.



4. In DOCUMENT COD field, enter **[F9]** or click on the Search icon .

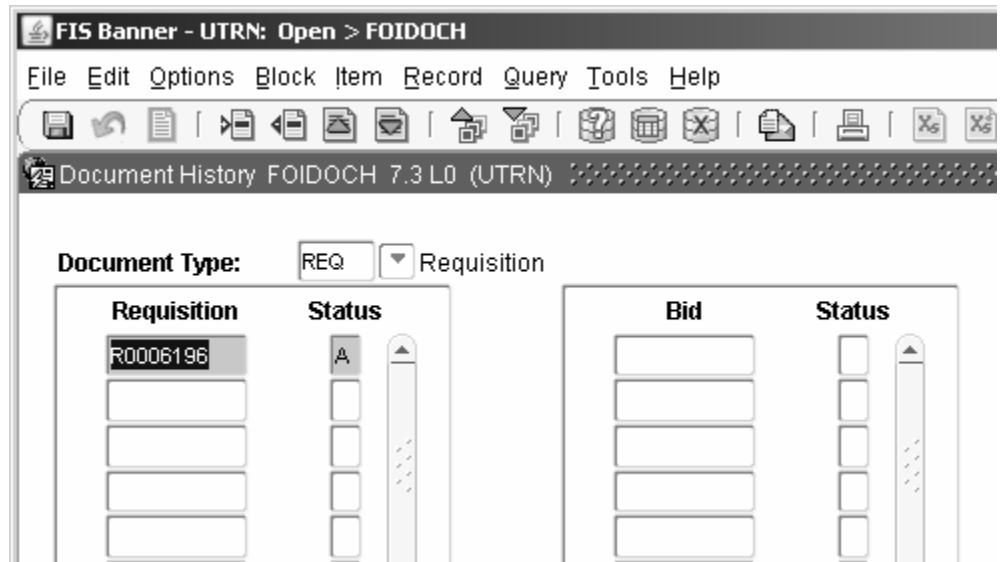


5. Enter Query [F7] using "Sue Miller" as the REQUESTOR and "%1997" as the REQUEST DATE. Execute Query [F8] and highlight the record for Vendor: Apple Computer Inc. (R0006196). Exit with Value [Shift+F3] to return to FOIDDOCH with the highlighted record.



6. Enter **Next Block** to display (populate) FOIDDOCH.

7. To view a specific document, highlight the document and enter [F3] Duplicate Field or select **Menu: Options: (Formname) Information** to display the specific document. We're selecting the Requisition.



Please refer to Exercise 2 for information on how to navigate through a form.

8. To exit the form, click the Exit icon, Right Click - Exit, or key [CNTL+Q] Exit.

Self-test Review 3: Querying a Form



1. Enter FOIDOCH. Repeat Steps 1-8 looking up the following information: REQUESTOR - **Manager Navigation #1**, VENDOR NAME - **Office Depot Inc.**

When you have completed your review in FOIDOCH, click "**Rollback**".

2. Search on your name, birthday or some random information just for fun. Make a selection and look at the forms. Use Steps 1-8 for assistance.




You have used both a Find and a Query Form.
You have completed Lesson 3 of the Navigations Workbook.
Congratulations...this is the final lesson!





Please continue to practice in FIS Usertrain until you are comfortable with Banner.

To logon to FIS User Train:








- Go to <http://fis.ucsc.edu>
- Click on the FIS User Train red apple logo,
- Username: train## (e.g. train23)
- Password: utr # # (e.g. utr23)

Banner Actions: Keystroke, Menu, Right-Click or Toolbar


Action: FORM	Keystroke	Menu Bar	Right Click	Tool Bar	Explanation
Rollback/Clear Form	shift F7	File > Rollback	RightClick-Rollback		Returns cursor to key block/top of form
Form to Form Direct Access	F5 (do not use with FZAJVCD or FZAJVEL)	File > Direct Access			Lets you navigate to any form without leaving the form you are in.
Action: BLOCK	Keystroke	Menu Bar	Right Click	Tool Bar	Explanation
Next Block	control pagedown	Block > Next			Moves cursor to next window or block
Previous Block	control page up	Block > Previous			Moves cursor to previous block
Action: FIELD	Keystroke	Menu Bar	Right Click	Tool Bar	Explanation
Clear Field/Item	control u	Field > Clear			Clears current field
Duplicate Field/Item	F3	Field > Duplicate			Creates duplicate of previous record
Next Field/Item	tab	Field > Next			Moves cursor to next field
Previous Field/Item	shift tab	Field > Previous			Moves cursor to previous field

Action: RECORD	Keystroke	Menu Bar	Right Click	Tool Bar	Explanation
Clear Record	shift F4	Record > Clear			Clears record
Duplicate Record	F4	Record > Duplicate			Creates duplicate of previous record
Insert Record	F6	Record > Insert			Inserts a new blank record
Next Record	downarrow	Record > Next			Shows the next record
Next Set of Records	control > or control shift >	Query > Fetch Next Set			Shows the next set of records from a list that scrolls beyond the screen
Previous Record	uparrow	Record > Previous			Shows previous record
Remove Record	shift F6	Record > Remove			Removes (deletes) record
Scroll Down	downarrow	Record > Scroll Down			Scrolls down
Scroll Up	uparrow	Record > Scroll Up			Scrolls up

Banner Actions: Keystroke, Menu, Right-Click or Toolbar

Action: QUERY	Keystroke	Menu Bar	Right Click	Tool Bar	Explanation
Cancel Query	control q	Query > Cancel			Cancels a query
Count Query Hits	shift F2	Query > Count Hits			Counts number of records
Enter Query	F7	Query > Enter			Begins a query (or search)
Execute Query	F8	Query > Execute			Executes a query (or search)
Exit with Value/Select	shift F3	File > Select			Exits a validation table with data/value
Exit/Cancel/Exit without Value	control q	File > Exit			Exits a form, ends a query
List of Values (LOV)	F9	Help > List			Displays the validation table for a particular field
Wildcards	%	shift F7			Wildcard value
Action: EDIT	Keystroke	Menu Bar	Right Click	Tool Bar	Explanation
Beginning of Line	home				Moves cursor to beginning of field line
Delete Backwards	backspace				Deletes characters to the left of the cursor
Delete Character	delete				Deletes characters to the right of the cursor
Enter	enter or return				(Some keyboards have a return key rather than an enter key)
End of Line	end				Moves cursor to end of field line
Exit/Cancel/Exit without Value	control q	File > Exit			Exits a form, ends a query
Refresh	control p	File > Refresh			Refreshes the computer screen
Save/Commit	F10	File > Save			Saves (or commits) data
Scroll Left	leftarrow				Scrolls left
Scroll Right	rightarrow				Scrolls right

Banner Actions: Keystroke, Menu, Right-Click or Toolbar

Action: MENU	Keystroke	Menu Bar	Right Click	Tool Bar	Explanation
Direct Access	F5	File > Direct Access			Displays "Go to..." field above existing form, permits direct form entry instead of having to exit from current form
Exit Menu Bar	esc				Exits the menu bar, when using keystrokes to navigate the menu bar
Menu Bar	PC: alt (plus first letter of menu) Mac: command (plus first letter of menu)				Opens a menu on the menu bar. Use up and down arrow keys to navigate within the menu; left and right arrow keys to move to other menus. Type [enter] to select a command, or [esc] to exit menu bar.
Action: HELP	Keystroke	Menu Bar	Right Click	Tool Bar	Explanation
Dynamic Help		Help > Dynamic Help Query			Provides help and explanations at the field, block and screen levels
Action: OTHER	Keystroke	Menu Bar	Right Click	Tool Bar	Explanation
Print	shift F8	File > Print			Makes a screen print of current screen
Select Pull-Down List	arrows enter				Selects item from pull-down list
Select Radio Groups	arrows				Selects item from radio group
Show Function Keys	control F1	Help > Show Keys			Shows a list of available keystrokes
Toggle Check Boxes	space bar				Toggles check box on/off