FIS Banner Navigation and Query
Class Outline - 1:00 to 5:00

- Welcome and Introductions
- Accounts and How to Get Help
- Overview of FIS Banner
- Logging On to FIS Banner
- Accessing Banner Forms
- Banner Form Parts
- Banner Form 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.
You must have a valid FIS account to access FIS Banner.

Access is granted upon completion of required training and receipt by FIS of fully-authorized account forms.

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

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

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


FIS Training       http://financial.ucsc.edu/Pages/TrainingFIS.aspx

FIS Help Line      Send email to fis_probs@ucsc.edu
Overview of FIS Banner

The **Financial Information System (FIS)** is the system of record for the official UCSC financial ledgers and chart of accounts.

FIS provides support for the operational processing of all campus acquisitions, payables, equipment inventory, extramural funds and financial transfer activity, as well as for the production of official campus financial reporting for internal and external customers.
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

ADS
Alumni Development System
System Overview

ORACLE stores data in tables.

<table>
<thead>
<tr>
<th>Co1-field</th>
<th>Co2-field</th>
<th>Co3-field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>City</td>
<td>State</td>
</tr>
<tr>
<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.
### FOAPAL Codes

#### UCSC BANNER FIS CHART OF ACCOUNTS

<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>FOAPAL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**FOAPAL** stands for Fund, Organization, Account, and Program Codes. These codes are used to uniquely identify all sources of funding. The Fund is the unit of budgetary responsibility, such as a College office. The Account includes expenditures, revenues, transfers, assets, liabilities, and fund balances. The Program encompasses function categories like instruction, research, and student services. The Activity is user-defined for cost center accounting. The Location is typically a building and is reserved for future use.

The combination of Fund, Organization, Account and Program codes are required on expenditure, revenue, and transfer transactions.
Logging On to FIS Banner

- Account setup
- Internet Explorer for PC *(recommended)*
- Safari for Mac *(recommended)*
- Your logon is your signature – keep it private – NEVER SHARE YOUR LOGON CREDENTIALS
  - Recommend changing every 90 days
- Selecting or changing passwords
  - Refer to FIS Manual
FIS LAUNCH PAGE

http://fis.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
Banner Timeout

Banner will time out after 4 hours of inactivity.

To log back on, you will need to enter your username, password AND database: BPRD
Selecting and Entering a Form

Type in Form Name

Browse Folders to Locate Form By Type

Search for a Form
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
Banner Form Naming

Finance System

Purchasing Module

Inquiry Form

Form Code Name
(Requisition)

F P I REQ N
Banner Saves Your Forms!

Banner keeps a list under the File menu of each form used per session. This list goes away when the session is closed.
Hands on

- Exercise 1
FIS Banner Form Parts

Location Bar
Menu Bar
Tool Bar
Title Bar
Header
Body
Hint Text
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:
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 Navigation

Banner forms are made up of blocks, fields and records. The key to navigation within a form is knowing whether you need to navigate to a block, field or record.

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

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

**Records**
Next - [↓]
Previous - [↑]
Navigation Methods

To navigate by function keys, use the Keyboard Template:

<table>
<thead>
<tr>
<th>FIS Banner Keyboard Template</th>
<th>Next Block – Ctrl + Pg Dn</th>
<th>Next Field – Tab</th>
<th>Next Record – Arrow Dn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exit/Cancel – Ctrl + q</td>
<td>Prev Block – Ctrl + Pg Up</td>
<td>Prev Field – Shift + Tab</td>
<td>Prev Record – Arrow Up</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Shift + Exit w Value</th>
<th>Delete Clear Fm</th>
<th>Rollback Print</th>
<th>FIS Banner Launch Page <a href="http://fis.ucsc.edu">http://fis.ucsc.edu</a></th>
</tr>
</thead>
</table>

| No Shift | Dup Field | Dup Record | Insert Record | Enter Query | Execute Query | List of Values | Save/ Commit |

For mouse navigation, use the Menu Bar:

File Edit Options Block Item Record Query Tools Help

or the Tool Bar:
HEALTHY MOUSING

- **Proper Equipment Setup**
  - Same height as keyboard
  - Minimize arm extension
  - Alternate hands
  - Programmable mouse

- **Proper Movement**
  - Move using arm’s large muscle groups
  - Minimize bending wrist
  - Hold with light grip

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

- **EH&S Websites**
  - http://ehs.ucsc.edu/programs/IIPP/index.html
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.
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
Navigation/Query Review

Navigation

Exit - Ctrl-Q
Next or Previous Block - Ctrl-Pagedown/Up
Record - Arrow Down/Up
Field - Tab/Shift-Tab
Options Menu - Where document and item text can be found
Rollback - Clears information to allow new query without having to exit to main menu
File Menu – list of forms used for current session

Query

List of values - Search icon or F9
Enter query - F7
Execute Query - F8
Exit with value - Shift-F3
Wildcard - '%', and ''_''
Hands on

- Proficiency Exercise
- Class Evaluation

Complete and turn in both sheets
The End