

Points of Discussion

My Banner

At the first screen after signing onto Banner in the top left corner of the Grayish-Blue area is "My Banner"

Double Click on My Banner and follow the directions to customize your own Banner worksite. Here you can add Report Codes such as the ones listed below to create shortcuts for the ones you use the most.

FGIBDST (Budget Status) for looking up FOAPAL information for specific Orgs as to budgeted dollars, YTD Activities and available dollars.

FGIBDSR (Executive Summary) identical to FGIBDST but allows individual or abbreviated entries using the Wild Card symbol "%".

FGIBAVL (Budget Availability Status) Information specific; Fund, Org, Account & Program are required. Shows "pooled" amounts for each of the 4000, 5000 and 6000 accounts (Non-Labor) and the remaining dollars left in that Org.

FOAAINP (Document Approval) Shows you where your document such as a PO is at and who's approval queue it is in.

FOAUAPP (User Approval) This report code is to be used by those needing to approve a document vs. use of My Banweb.

FOIDOCH (Document History) Can look up where a PO is at in the process and what it is regarding.

FPIPURR (Purchase Order Query) To look up a PO and to verify information about it.

F7 (Key) Clears screen in preparation for a new query.

F8 (Key) Executes a query (functions as the "enter" button).

"Options" drop down box

To look up details of an amount on the screen, high light the amount and go up to the top of the screen and click on the "Options" button for the drop down box and click on "Detail Transaction Summary" for a break down of the dollars connected to a total sum.

"Help" drop down box

To export information to an "Excel" spreadsheet click on the "Help" button on the top of the screen and select "Data with No Key" and follow the prompts to save it to your hard drive. Remember when you save to select the file type and select Microsoft Excel 2003.

Wild Card Usage "%"

When looking for general information on any given item in Banner but do not have specifics; one can use a "Wildcard" by typing in "%" after the start your first few numbers.

**** Remember** whenever you use an execute command and nothing happens; please check the bottom of the screen for an explanation as to why.