Banner Admin

Quick Reference Guide

Navigation, Requisition Entry, and P-Card Detail Entry

November 2018

Banner Admin
Quick Reference Guide
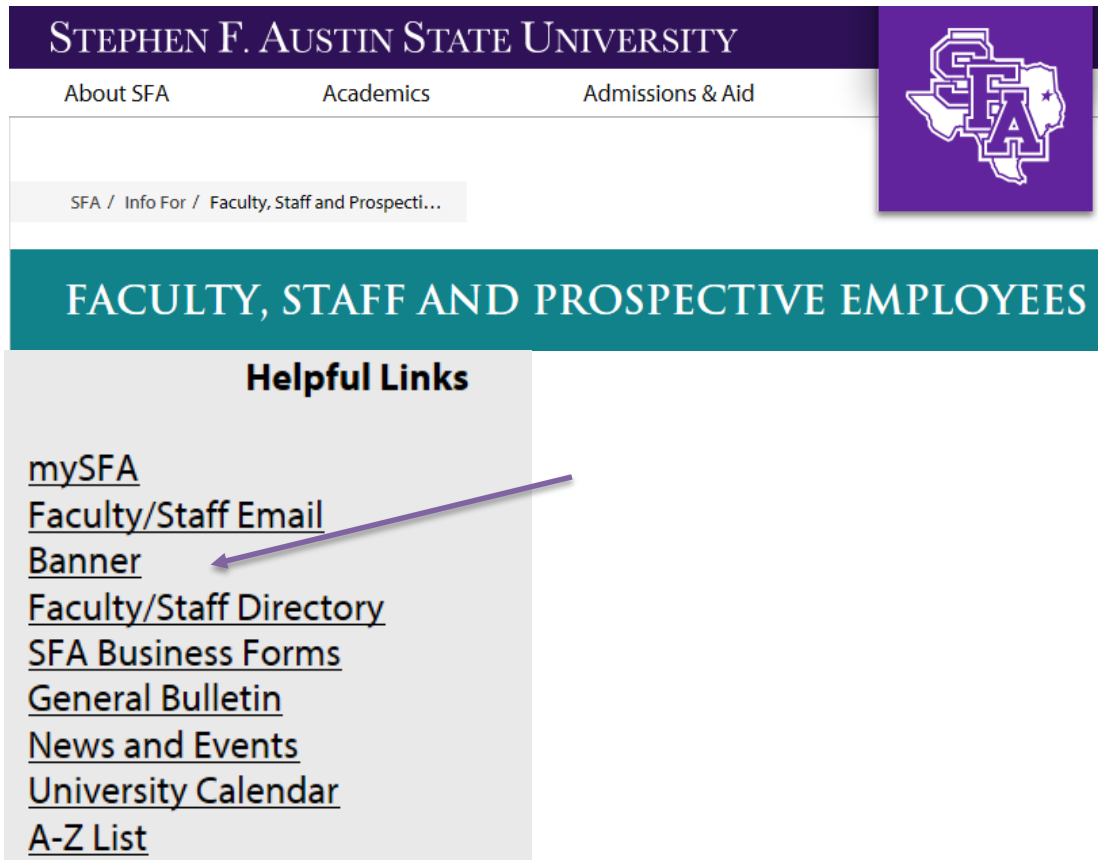
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Accessing Banner

Banner Admin can be accessed at http://banner.sfasu.edu/

(Chrome, Firefox, and Internet Explorer are all supported browsers)

OR

STEPHEN F. AUSTIN STATE UNIVERSITY

About SFA   Academics   Admissions & Aid
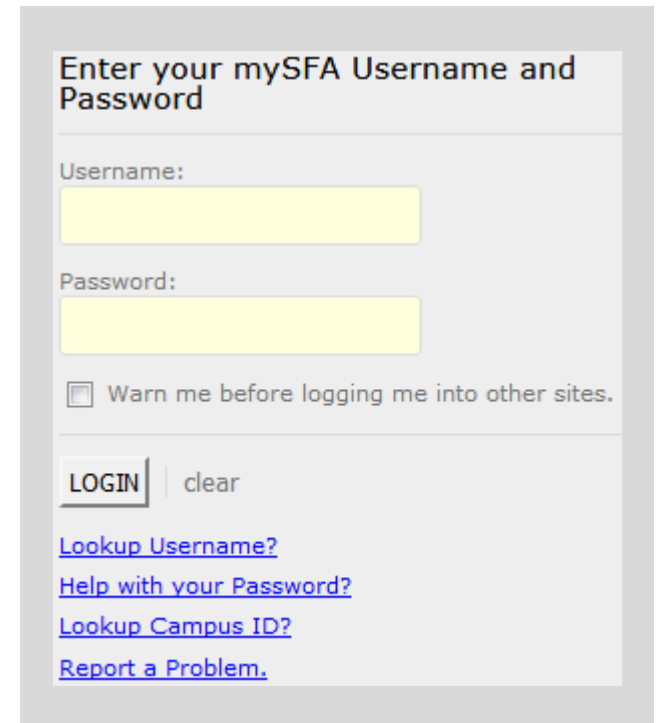
SFA / Info For / Faculty, Staff and Prospecti...

FACULTY, STAFF AND PROSPECTIVE EMPLOYEES

Helpful Links

mySFA
Faculty/Staff Email
Banner
Faculty/Staff Directory
SFA Business Forms
General Bulletin
News and Events
University Calendar
A-Z List

Log on using your mySFA User Name and Password

Enter your mySFA Username and Password

Username:

Password:

☐ Warn me before logging me into other sites.

LOGIN | clear

Lookup Username?

Help with your Password?

Lookup Campus ID?

Report a Problem.

1) **Menu** icon: Provides access to Banner Menu. Toggle to display or hide the icon names.
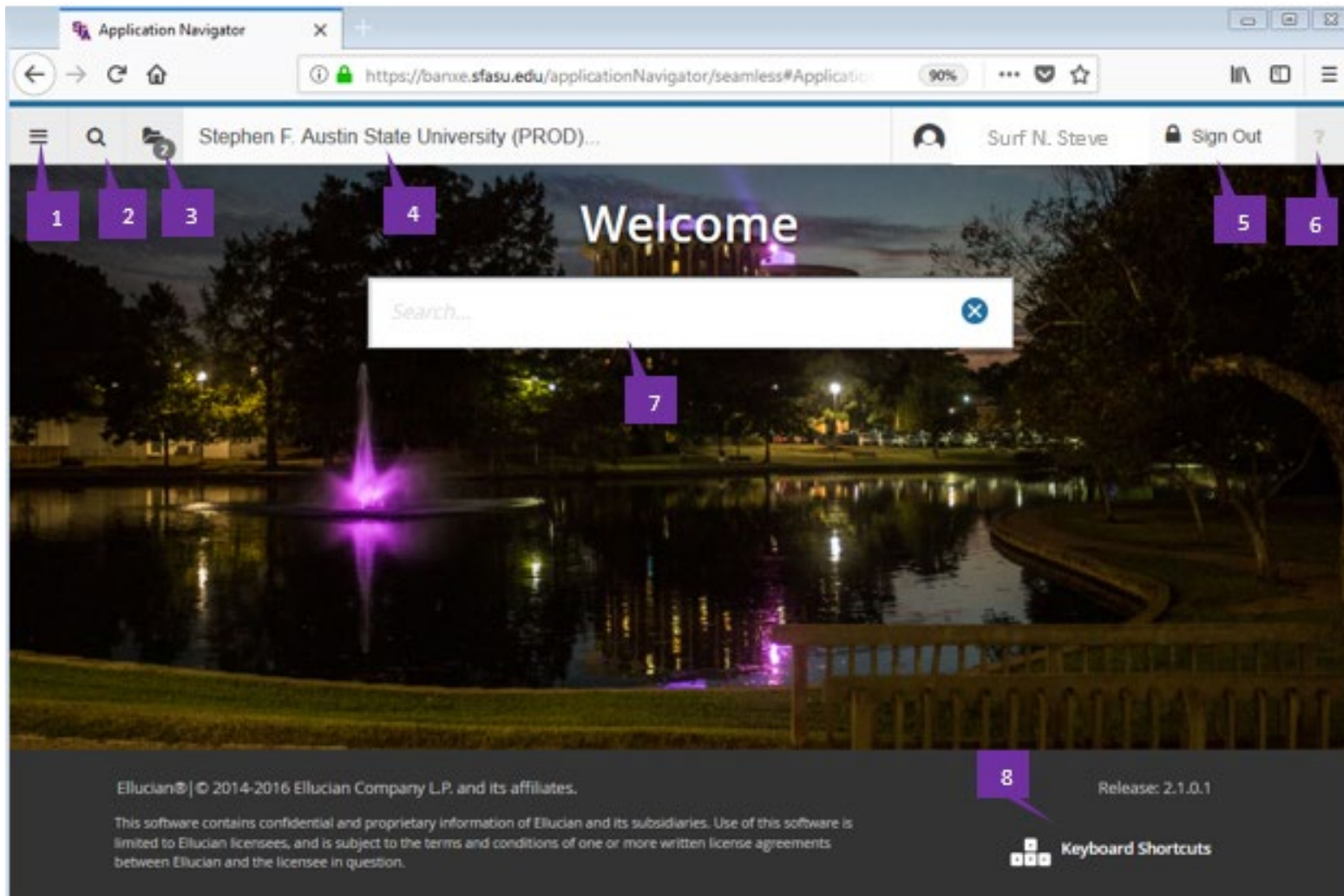
2) **Search** icon: Find pages using key words or the seven letter identifier. *Results display after entering three letters*

3) **Recently Opened** icon: View a list of recently opened pages and forms. The number on the folder shows a count of opened pages.

4) **Dashboard:** Click to return to the Landing Page from any page

5) **Sign Out** icon: Click to log out of the application.

6) **Help** icon: View online help for Banner Admin applications. Only *active when a page is open.*

7) **Search** for pages using key words or the seven letter identifier.

8) **Keyboard Shortcuts:** Click the link to see a list of keyboard shortcuts used to navigate the landing page. With the exception of **Sign Out**, use these keyboard shortcuts like a toggle switch to open and close the specific page element.

1) Key Block and Page Header

Only the page's key block displays initially. **Enter required information, then click Go to activate page.** The page header provides easy access to key functions, including:

- **X** icon: Closes the page
- **RELATED** icon: Displays a list of pages related to the open page. Select from the list or **Search** for a specific page. Contains **Document Text and Item Text.**
- **TOOLS** icon: Perform standard actions and options for the page currently displayed (formerly located in the **Options and File** menu in Banner 8.)

2) Page Elements

The key block collapses and **Go** is replaced with **Start Over** (Rollback in Banner 8).

- **Tabs**: Organize information by content area. Tabs are active unless grayed out.
- **Sections:** Known as blocks in Banner 8, sections (denoted by gray bars) provide details about the ID/Code in the key block. When active, actions such as **Insert**, **Delete**, **Copy**, and **Filter** can be performed.

3) Page Footer The page footer provides access to additional navigation tools and information.

- **Next Section / Previous Section** icons: Known as **Previous Block** or **Next Block** in Banner 8, use these icons to move between sections or tabs on a page.
- **Save** icon: A major difference between Banner 8 and Banner Admin, the **Save** button is located at the bottom of the page.
- **Record Count**: Indicates the number of records displayed.
- **Table/Field Name**: Displays at the very bottom of the page for quick reference.

Performing a Lookup

The **Lookup** icon allows you to quickly search for a value for a field. Note that not all fields have **Lookup** icons.

1. Click the **Lookup** icon in the selected field.

Citizenship   Y   ...   Citizen

Lookup icon

2. A list of values displays. To narrow the results, type a value in the **Criteria** field, then press **Enter**.

3. To return a value to the selected field, highlight the correct value and click **OK**. Or, double-click on the correct value to return it to the field.

Enter Criteria

Citizen Type Validation (STVCITZ)

Criteria   Q

Code	Desc	Citizen
EL	Eligible Citizenxxxxxxxxxxxxxxxx	N
N	Non-Citizen	N
NR	Nonresident Alien	N
RA	Resident Alien	N
WW	Worldwide	N
Y	Citizen	Y

Filtering Data

You can query data in a section by clicking the active **Filter** icon in the section header. Note that in some cases, when you click the **Lookup** icon, you will be presented with the Filter window as well. There are two filter types: Basic and Advanced.

Basic Filter (default): Use the **Basic Filter** to specify search criteria using pre-defined search fields.

1. In the fields that display, enter or select a value for each field on which you want to search. To return all records in the system, just click Go without entering any filter criteria, You may add basic operators when entering data in text fields (see below).

2. Click **Go** to display the results.

3. Click the **Filter Again** button (on the **Search Results** window) to further refine your search.

PERSON SEARCH   Insert   Delete   Copy   Filter

Basic Filter   Advanced Filter

ID	Last Name	First Name	Middle Name

Change Indicator   Add Another Field ...

Select other fields on which to filter by selecting from the drop-down list

Clear All   Go

Notes

- Remove search fields by clicking the **Minus Sign** icon associated with the field or click the **Clear All** button.

- Add search fields by selecting from the **Add Another Field** drop-down list.

- Add operators, or wildcards, when entering values into text fields. If you enter operators here and click the **Advanced Filter** link, the operators are retained. This works in reverse as well: Enter operators on the **Advanced Filter** window and click the **Basic Filter** link and all operators are retained.

Sample Operator Conventions

Basic Operator	Advanced Operator
%D%	Contains
D%	Starts with
%D	Ends with

Filtering Data, continued

Advanced Filter: Use the **Advanced Filter** to specify filter data using SQ type operators.

1. For each field on which you want to search, click the **Operator** drop-down arrow and select the appropriate operator. The available operators depend on the type of field selected (numeric, alphanumeric, date, check box, or other).

3. Enter a value for the field you selected (in the blank field to the right of the **Operator** field).

4. Repeat steps 1 – 3 until all filter criteria are entered.

5. Click **Go** to display the results.

6. Click the **Filter Again** button (on the **Search Results** window) to refine your search results.

Notes

- Remove search fields by clicking the **Minus Sign** icon associated with the field or click the **Clear All** button.

- Add search fields by selecting from the **Add Another Field** drop-down list.

- If you enter operators here and click the **Basic Filter** link, the operators are retained. This works in reverse as well.

Check Banner Messages GUAMESG

The shortcut is not available at this time. Enter form name GUAMESG in the Search section on the Landing Page see messages.

1. Type **FPAREQN** or Requisition in a search field.
   Click Enter or select from the drop down box.

Welcome

fpareqn   (1)

**Requisition
(FPAREQN)**
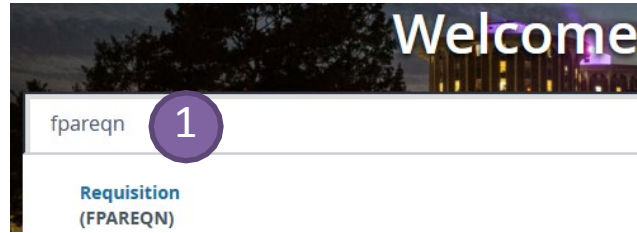
2. Type in **NEXT** or leave blank, or enter REQ # (R00xxxx) to work on an incomplete requisition
   Click **GO**, **Next Section**, or **Enter** on your keyboard

✕ ⊘ ellucian   Requisition FPAREQN 9.3.7 (PPRD)

Requisition: [(2)   ] ⋯   [Copy]   Click to copy a   Go
                                                               previous requisition

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

3. Select the **Delivery Date**
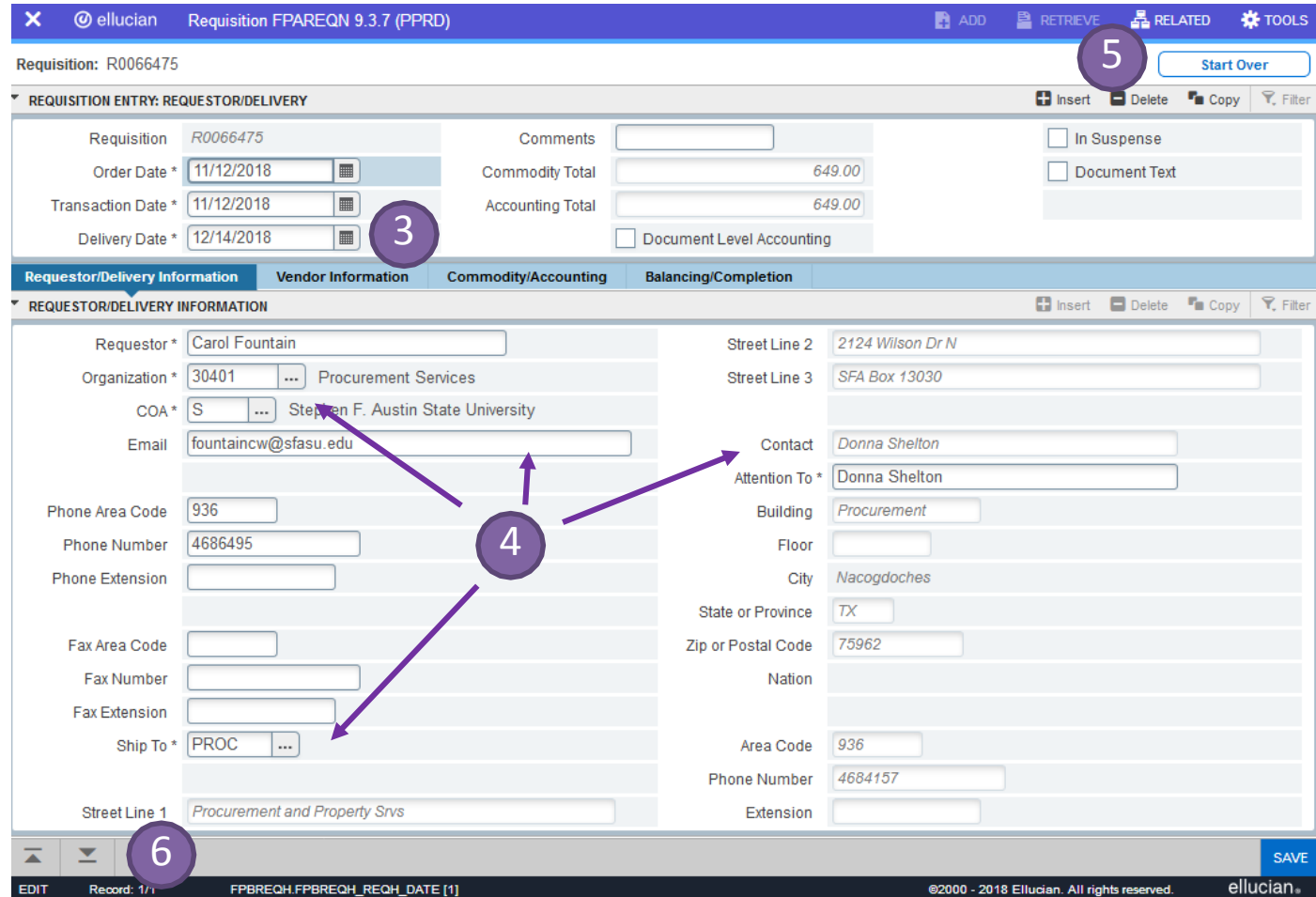
4. Update, **if needed**:
   - ORG
   - Email
   - Ship To
   - Contact

5. Add **Document Text**
   - See **RELATED**
   - Choose **Document Text**
   - Click **GO**
   - Enter document text
   - Click **SAVE**
   - Select **X** to exit

6. Click **Next Section**

✕ ⊘ ellucian   Requisition FPAREQN 9.3.7 (PPRD)   ADD   RETRIEVE   RELATED   TOOLS

Requisition: R0066475   (5)   Start Over

REQUISITION ENTRY: REQUESTOR/DELIVERY   ➕ Insert ➖ Delete ▣ Copy ▼ Filter

Requisition	R0066475		Comments			☐ In Suspense
Order Date *	11/12/2018		Commodity Total	649.00		☐ Document Text
Transaction Date *	11/12/2018		Accounting Total	649.00		
Delivery Date *	12/14/2018	(3)	☐ Document Level Accounting			

Requestor/Delivery Information   Vendor Information   Commodity/Accounting   Balancing/Completion

REQUESTOR/DELIVERY INFORMATION   ➕ Insert ➖ Delete ▣ Copy ▼ Filter

Requestor *	Carol Fountain		Street Line 2	2124 Wilson Dr N
Organization *	30401 ⋯ Procurement Services		Street Line 3	SFA Box 13030
COA *	S ⋯ Stephen F. Austin State University			
Email	fountaincw@sfasu.edu		Contact	Donna Shelton
			Attention To *	Donna Shelton
Phone Area Code	936		Building	Procurement
Phone Number	4686495	(4)	Floor	
Phone Extension			City	Nacogdoches
			State or Province	TX
Fax Area Code			Zip or Postal Code	75962
Fax Number			Nation	
Fax Extension				
Ship To *	PROC ⋯		Area Code	936
			Phone Number	4684157
Street Line 1	Procurement and Property Srvs		Extension	

⏫ ⏬ (6)   SAVE

EDIT   Record: 1/1   FPBREQH.FPBREQH_REQH_DATE [1]   ©2000 - 2018 Ellucian. All rights reserved.   ellucian.

7. Select **Vendor** by using the search icon
8. Search using **FTIIDEN** (see Searching and Filter Data)
9. **Next Section** to navigate to the Commodity/Accounting section

10.   Search by **Description** to select the Commodity
11.   Enter **Quantity** and **Unit Price**
12.   Enter **Item Text** (see **RELATED**, choose **Item Text**, click **GO**, enter text, click **SAVE**, select **X** to exit)
13a. **Next Section** to complete the Accounting section
13b. **Previous Section** to add a new line item (use Insert or down arrow), or **Next Section** to navigate to Balance/Completion
14.   Continue to add line items and corresponding Item Text and accounting until complete, then **Next Section** to Balance/Completion

15. Status should be BALANCED
    - o Amounts should match quote
    - o VIEW DOCUMENT in SSB to verify information entered is correct
      (total, document and item text, FOP, accounting)
16. **Complete**

SSB
(Self-Service Banner)
View Document

http://www.banner.sfasu.edu/, or
https://mysfa.sfasu.edu/
Budget & Finance tab

STEPHEN F. AUSTIN STATE UNIVERSITY

HOME   EMPLOYEE   RESOURCES   BUDGET & FINANCE

Check your total

Requisition Header

Requisition	Order Date	Trans Date	Delivery Date	Print Date	Total
R0066475	Nov 12, 2018	Nov 12, 2018	Dec 14, 2018		897.00

Origin:	BANNER					
Complete:	Y		Approved:	N	Type:	Procurement
Cancel Reason:					Date:	
Requestor:	Carol Fountain			30401	Procurement Services	
Phone Number:	936-468-6495					
E-mail:	fountaincw@sfasu.edu					
Accounting:	Commodity Level					

Ship to:	Procurement and Property Srvs
	2124 Wilson Dr N
	SFA Box 13030
	Procurement
	Nacogdoches, TX 75962
Attention:	Donna Shelton
Contact:	Donna Shelton
Phone Number:	936-468-4157

Vendor:	20003345	GTS Technology Solutions, Inc.
	9211 Waterford Centre Blvd	
	Ste 202	
	Austin, TX 78758-7665	
Phone Number:	800-783-7459	
Fax Number:		

Document Text:	Computer for Receiving

	See quote #QT00055143

Banner Production

Internet Native Banner (INB)

Internet Native Banner (INB Displays Larger Font Size)

Note: Banner Admin (Banner 9) supports all browsers.

Banner Admin (Banner 9)

Note: When using Banner INB you will need to use IE.

Off-campus users must run the SFASU VPN for access. Click here for more information.

For technical support issues, please contact the Help Desk at 936-468-1212.

Online Services (Self-Service Banner)

This link will take you to mySFA where you will logon, click the myServices Tab, and click on Online Services.

Other software products for use with Banner [PROD]

You must have separate login access to use these products.

Application Manager Scheduling Link

WebFOCUS 8 Reporting Login

WebFOCUS 8 Instructions Document

Item 1
Commodity/Description

Item 1 Accounting

Requisition Commodities

Item	Commodity	Description	U/M	Qty	Unit Price	Ext Amount		
					Disc	Addl	Tax	Cost
1	000P20453G	COMPUTER - STANDARD - DESKTOP	EA	1	649	649.00		
					0.00	0.00	0.00	649.00
	Dell OptiPlex 7060 SFF							

Requisition Accounting

Seq#	COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSFSusp	NSFOvr	Susp	Amount
1	S	19		150002	30401	773781	350				N	N	N	649.00
Total of displayed sequences:														649.00

Amount in Commodity section must match Ext Amount in Accounting section

Item 2
Commodity/Description

Item 2 Accounting

Requisition Commodities

Item	Commodity	Description	U/M	Qty	Unit Price	Ext Amount		
					Disc	Addl	Tax	Cost
2	000P20460A	MONITORS, COMPUTER	EA	2	124	248.00		
					0.00	0.00	0.00	248.00
	Dell 24" Monitor - P2419H							

Requisition Accounting

Seq#	COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSFSusp	NSFOvr	Susp	Amount
1	S	19		150002	30401	773770	350				N	N	N	248.00
Total of displayed sequences:														248.00

'N' or 'Y' must be in at least 2 of these fields in the Accounting section

1. Type **FAAINVT** or Purchase Card in a search field

2. Click **Enter** or select from the drop down box
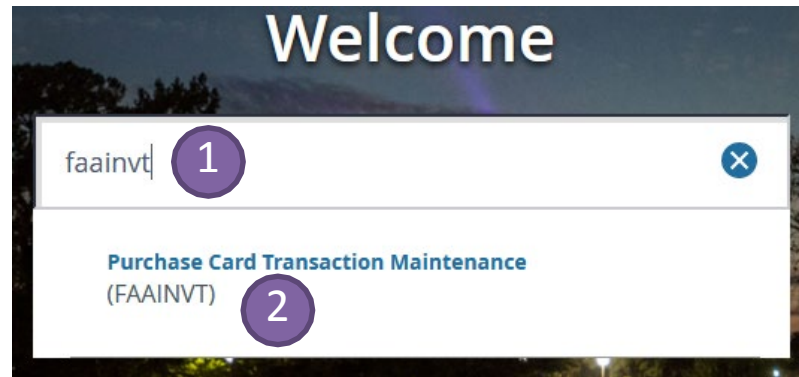
3. Enter the Cardholder ID#, **OR** the mySFA name of the Account Manager or the Business Manager
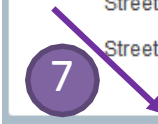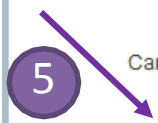
4. Click **GO** or **Next Section**

5. Use the navigation arrows to select the p-card to detail

6. **Next Section** to populate transactions in Vendor Information section

7. Select the desired transaction using the navigation arrows (activated after step #5)

8. **Next Section** to go to the detailing screen

Purchase Card Transaction Maintenance FAAINVT 9.3.6 (PPRD)

Cardholder ID: Responsible Organization: Account Manager ID: Business Manager ID: | SMITHSA   **Start Over**

Type: Not Fed Transactions

▼ CARDHOLDER INFORMATION   **＋ Insert ▬ Delete ▬ Copy ▼ Filter**

Cardholder ID	12345678 Suzy Smith	Card Status Code	A
Card Account Number	●●●●●●●●●●●●●●●●	Card Description	Card #6011
Start Date	05/02/2016	Account Manager ID	/MARTINBD
Expiration Date	02/01/2020	Business Manager ID	/ SMITHSA
Card Type	MC	Responsible Organization	₡99999

⑤

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▼ VENDOR INFORMATION   **＋ Insert ▬ Delete ▬ Copy ▼ Filter**

Vendor	20036367 [...] Summus Industries Inc	State or Province	
	☐ One Time	ZIP or Postal Code	
Check Vendor	[...]	Nation	
	☐ Credit Memo	Reference Number	000007950480679
Address Type	[...]	SIC	
Sequence	[...]	Document	
		Bank Post Date	10/12/2018
		Feed Date	10/24/2018 📅
City	SUGAR LAND	Payment Due Date	12/03/2018
Street Line 1		Invoice Date	10/10/2018
Street Line 2		Transaction Amount	54.98
Street Line 3			

DO NOT CHANGE ANYTHING ON THIS PAGE !!!!

⑦

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⤒ ⤓   **6, 8**   **SAVE**

9. Type over default wording 'Purchase Card Transaction' to enter items purchased

10. Click **Next Section**

11. Create a sequence for each unique FOAP (use Insert or down arrow key for additional sequences)

12. **SAVE**

13. To continue detailing click **Previous Section.** This returns to Vendor Information section to choose next transaction

14. Click **Next Section** to return to the Cardholder Information section to choose a different card to detail, or to Exit FAAINVT

Banner Admin – Keystroke Guide

Function	Key Stroke	Function	Key Stroke
Next Section	Alt + Page down	Save	F10
Previous Section	Alt + Page Up	Refresh / Rollback	F5
Next field/item	Tab	Duplicate Record	F4
Previous field/item	Shift – Tab	Insert Record	F6
Export	Shift + F1	Delete Record	Shift + F6
Print	Ctrl + P	Clear One Record	Shift + F4
Cancel page, Exit, Close page, Cancel search or query	Ctrl + Q	Search/Open Filter Query	F7
Open Related Menu	Alt + Shift +R	Execute Filter Query	F8
Open Tools Menu	Alt + Shift +T	Copy	Ctrl + C
Display Recently Open Items	Ctrl +Y	Paste	Ctrl + V
Application Navigator Search	Ctrl + Shift + Y	Cut	Ctrl + X
Application Navigator Help	Ctrl + Shift + L	Undo	Ctrl + Z
Application Navigator Sign Out	Ctrl + Shift + F	Cancel Action	Esc
Up	Up arrow	Next page up	Page up
Down	Down arrow	Next page down	Page down