

Banner INB Training

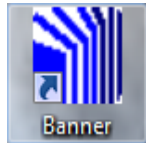
Logging onto Internet Native Banner (INB)

Your computer will need to be connected to the Smith network in order to log into INB

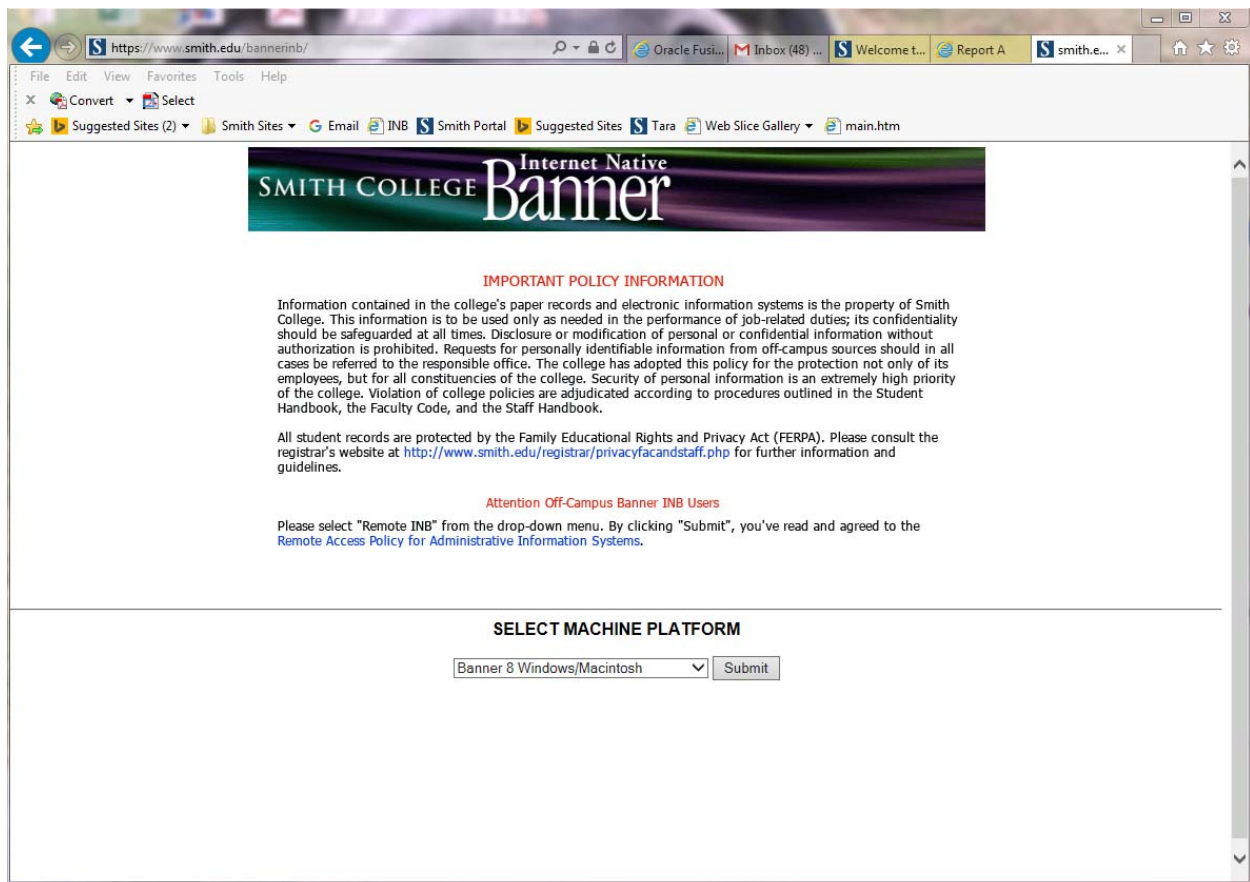
- ❖ Open up Internet explorer (preferred), Mozilla Firefox, or Safari and type in this URL:

<https://banner.smith.edu:9999/>

- ❖ You can also use the INB shortcut in the favorites tool bar of your web browser
- ❖ Select the banner Icon located on your desktop



The screen will pop up and look like this:

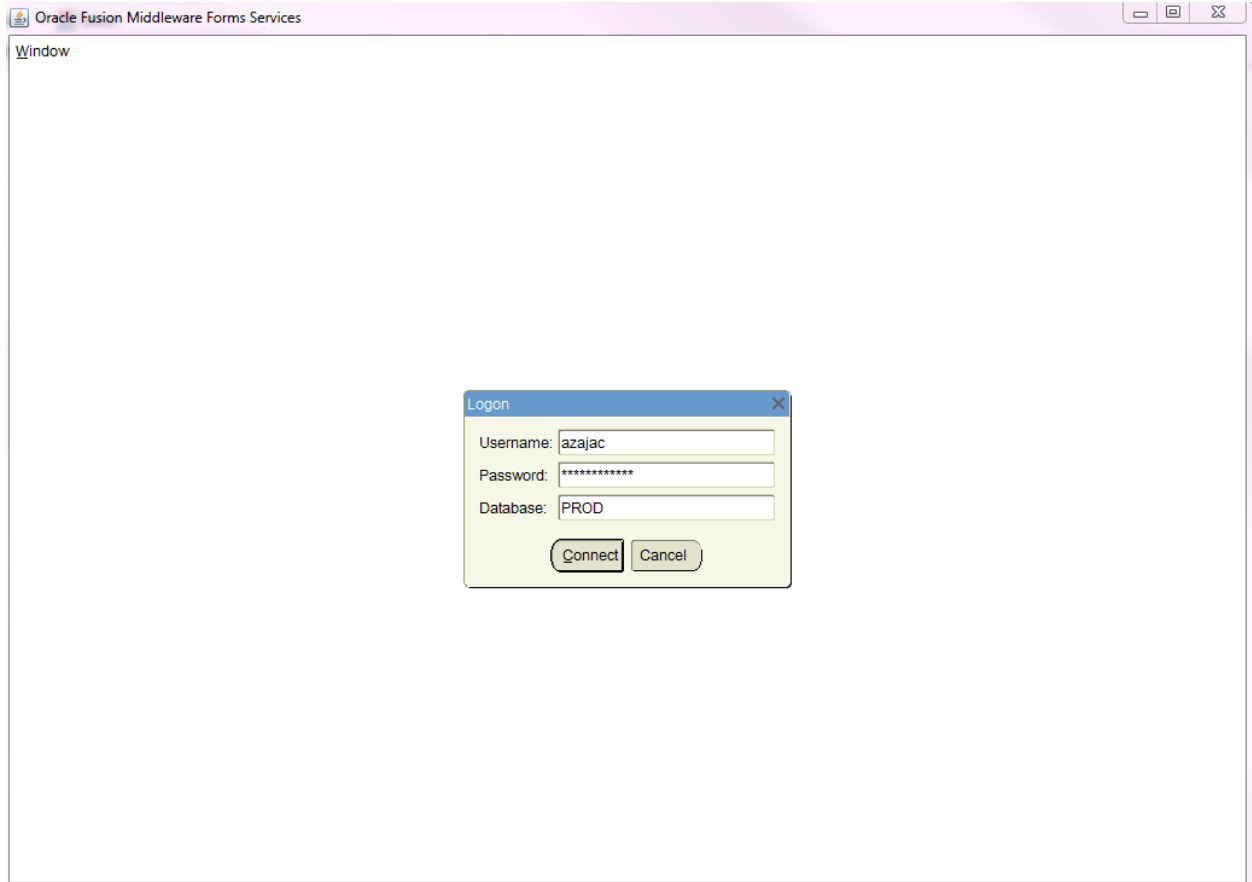


To log into banner production the machine platform should be “Banner 8 Windows/Macintosh”

Click on “Submit”

Enter your username and password as provided by ITS and click on the connect button

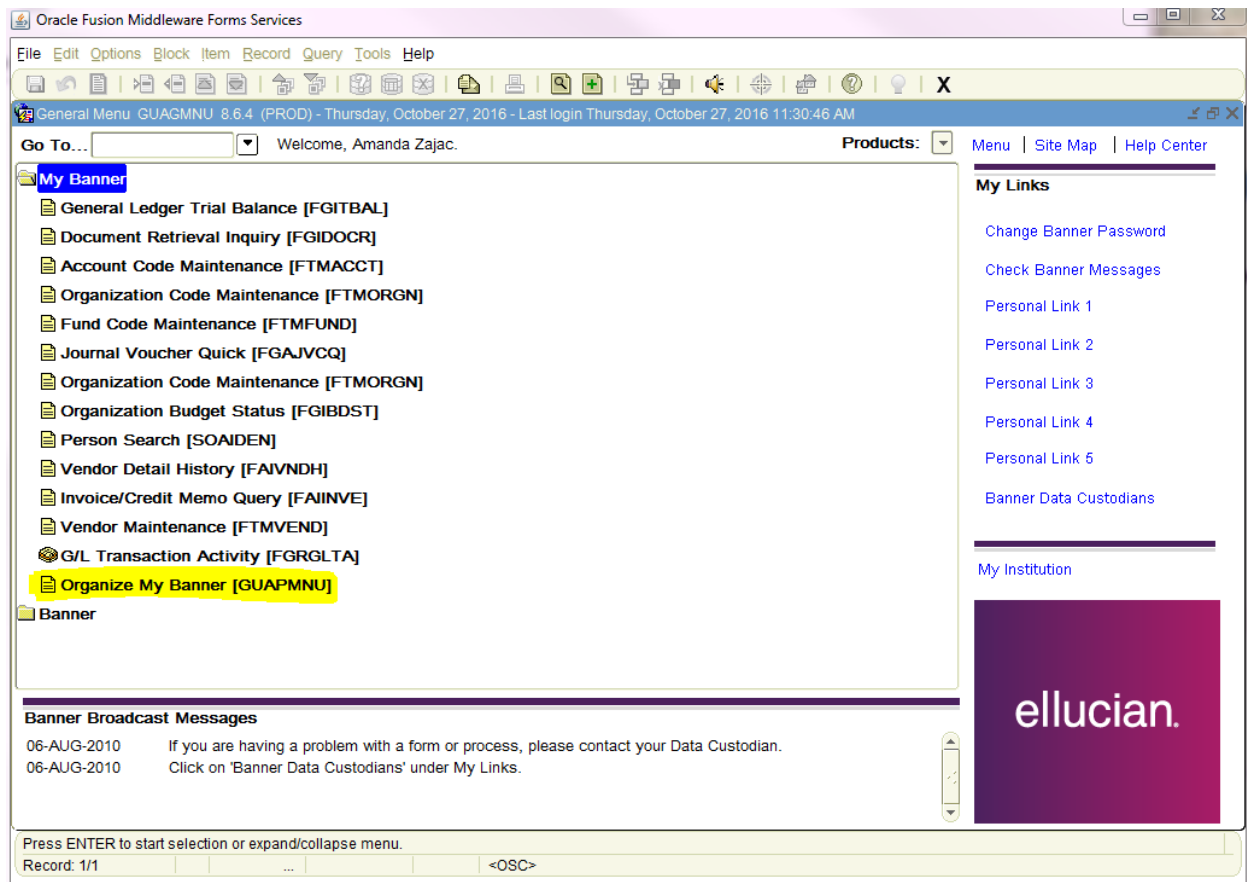
❖ If you forget your password, contact ITS at ext. 4487 to reset it.



Navigating the main menu in INB

Click on “My Banner” to expand the list of finance options.

NOTE: In the beginning when you expand this folder it will be empty and you should only see “Organize My Banner” [GUAPMNU]

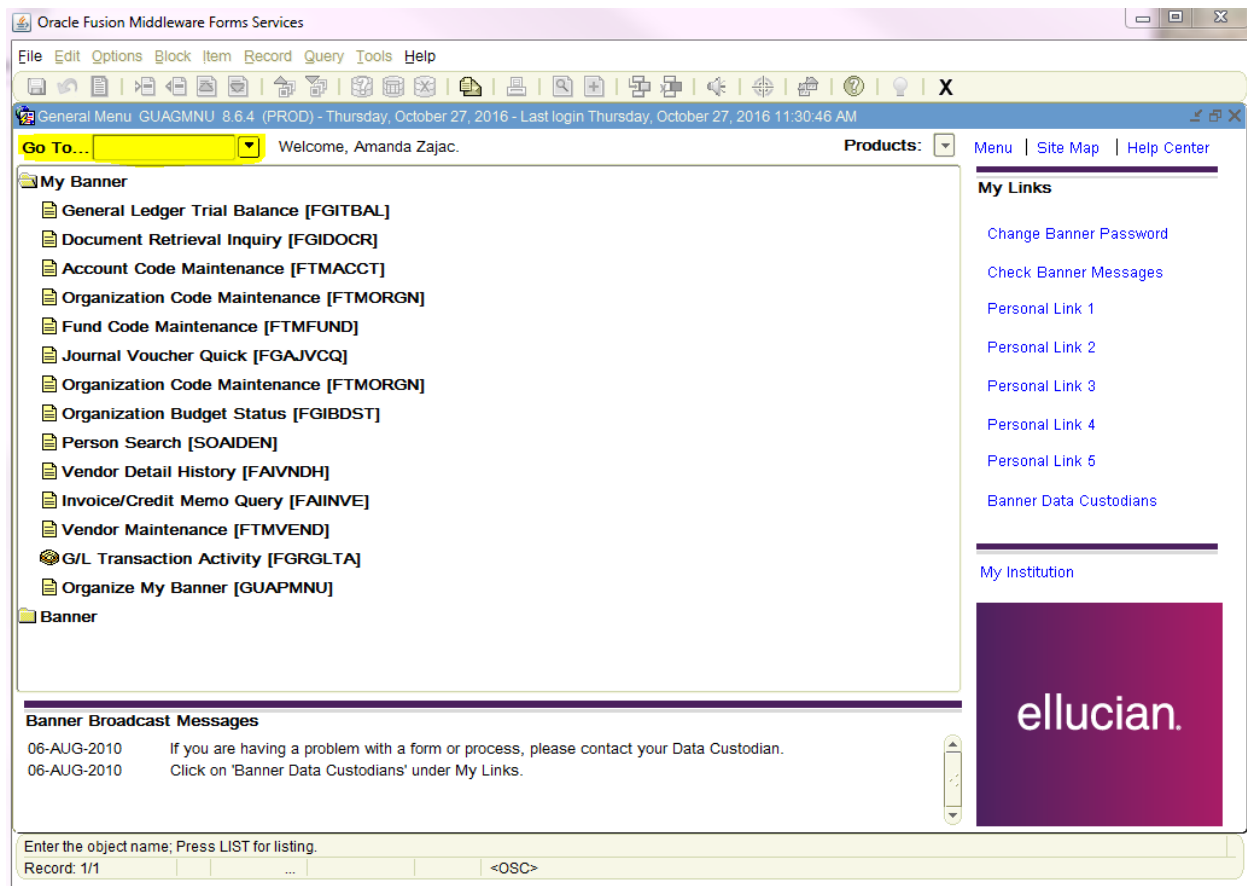


To create you list, click on “Organize my Banner”

We recommend that you make bookmark shortcuts to the most commonly used forms:

- ❖ FGIBDST- Organization Budget Status
- ❖ FGITBAL- General Ledger Trial Balance
- ❖ FTMVEND- Vendor Maintenance
- ❖ FOIDOCR- Document history
- ❖ FAAINVE- Invoice/Credit Memo

If you do not have a shortcut saved under “My Banner” you can also type the module in the “Go to...” box located on the top of the screen and hit enter to pull up that module (see below)

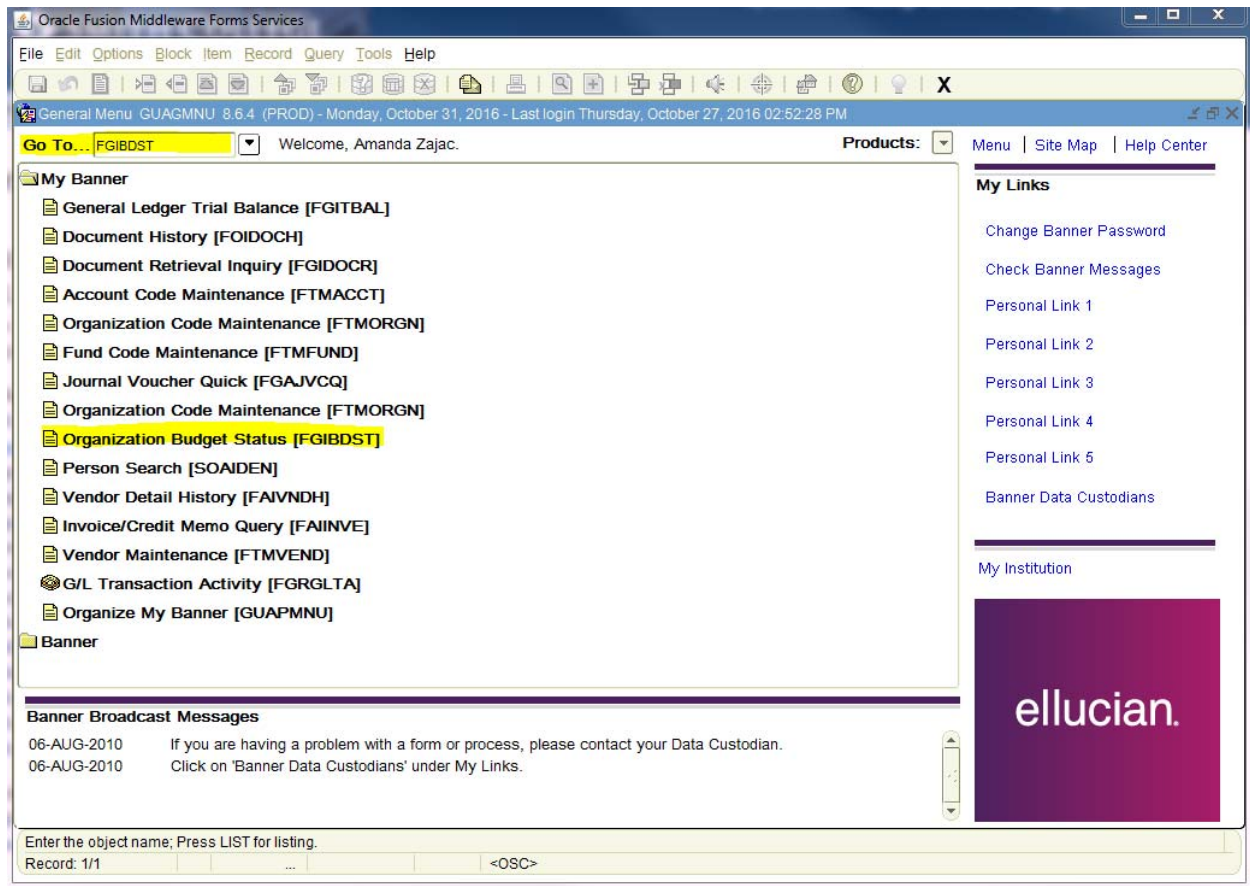


Personalizing your INB setup

Click on “Organize my Banner [GUAPMNU] under the folder labeled “My Banner”

Using form FGIBDST

Double click on “Organization Budget Status [FGIBDST]” under “My Banner” or type FGIBDST in the “Go To...” box at the top and hit enter




Navigation: To navigate between fields use the tab key. To move to the next field hit ctrl key and press page down at the same time or click on the Next Block icon at the top of the page . You may also use the mouse within each field to click on what you would like.

Chart should always be 1

Fiscal year: Current fiscal year or previous fiscal years

Fiscal years available: 95, 96, 97, 98, 99, 00, 01, 02, 03, 04, 05, 06, 07, 08, 09, 10, 11, 12, 13, 14, 15, 16, 17

[illegible]

Type in your org and press the tab key

The default fund and program codes will fill in automatically

Oracle Fusion Middleware Forms Services: Open > FGIBDST

File Edit Options Block Item Record Query Tools Help

Organization Budget Status: FGIBDST 8.5 (PROD)

Chart: 1
Fiscal Year: 17
Index:

Organization: 9351 Class of 1971
Fund:
Program:
Account:
Account Type:
Activity:
Location:


☐ Query Specific Account
☒ Include Revenue Accounts

Commit Type: Both

Account	Type	Title	Adjusted Budget	YTD Activity	Commitments	Available Balance
58903	R	Balance Forward	0.00	4,503.80	0.00	-4,503.80
58906	R	Class Dues	0.00	2,125.00	0.00	-2,125.00
Net Total:			0.00	6,628.80		

Dup Item for Detail, Count Query for Orgn. Summary, Dup Rec for Encum. List
Record: 1/2 ... <OSC>

Roll Back Function

If you would like to change any of the FOAPAL elements and execute a new query, the only way to return into the Key block is to use the “Roll Back” function. Use this icon  located in the upper left on the INB screen to execute a roll back.

Oracle Fusion Middleware Forms Services: Open > FGIBDST

File Edit Options Block Item Record Query Tools Help

Roll Back Icon

Organization Budget Status FGIBDST 8.5 (PROD)

Chart: 1 Fiscal Year: 17 Index:
☐ Query Specific Account
☒ Include Revenue Accounts
Commit Type: Both

Organization: 9351 Class of 1971
Fund:
Program:
Account:
Account Type:
Activity:
Location:

Account	Type	Title	Adjusted Budget	YTD Activity	Commitments	Available Balance
58903	R	Balance Forward	0.00	4,503.80	0.00	-4,503.80
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Net Total:			0.00	6,628.80		

Dup Item for Detail, Count Query for Orgn. Summary, Dup Rec for Encum. List
Record: 1/2 ... <OSC>

Account Line Details

For more detail on an account, highlight the record and click on options in the top menu bar, then click on transaction detail information.

Oracle Fusion Middleware Forms Services: Open > FGIBDST

File Edit Options Block Item Record Query Tools Help

Budget Summary Information [FGIBSUM]
 Organization Encumbrances [FGIOENC]
Transaction Detail Information [FGITRND]
 Format Display Preferences

Chart: Organization: 9351 Class of 1971
 Fiscal Year: 17 Fund:
 Index: Program:
☐ Query Specific Account Account:
☒ Include Revenue Accounts Account Type:
 Commit Type: Both Activity:
 Location:

Account	Type	Title	Adjusted Budget	YTD Activity	Commitments	Available Balance
58903	R	Balance Forward	0.00	4,503.80	0.00	-4,503.80
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Net Total:			0.00	6,628.80		

Dup Item for Detail.Count Query for Orgn. Summary.Dup Rec for Encum. List
 Record: 1/2 ... <OSC>

Note: If your cursor is on the adjusted budget column, then click on the transaction detail information, you will only get budget information. If your cursor is on the YTD activity then click on transaction detail information, you will only get actual expenditures and revenue.

[illegible]

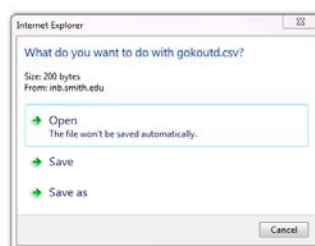
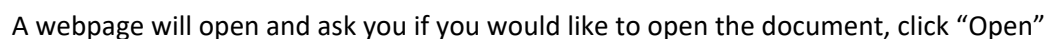
This gives a high level overview of the department as well as totals for budget, actual, etc

Click on the X button to close the form

Dump Data into Excel

Dumping your data in excel is useful if you would like to analyze your data or manipulate it as you would like.

Click on "Help" at the top of the screen, scroll down and click on "Extract Data no Key"



The download process will take a few minutes and then pop open into excel