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 your 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
- FOIDOCH - 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”
Type a form name, for example FGIBDST in the object column on the left side of the screen. Press the tab key to populate the description field

To overwrite the Banner description with one that is meaningful to you. Press Save. Click X to return to the main menu.
**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
Type in your org and press the tab key
The default fund and program codes will fill in automatically
Navigation between blocks is possible in a variety of ways:

- Hold down the ctrl key and press the PageDown key at the same time
- Click on the Next Block icon at the top of the page
- Select Next from the block pull down menu
- Left-click in the account field of the data block

*Note: To pull up all your data remove the program code before you navigate down to the next field to review your data.*
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.
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.
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.
Budget Summary

Click on options/budget summary information
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 if 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”
A webpage will open and ask you if you would like to open the document, click “Open”

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