# Basic Banner Finance

Finance Training

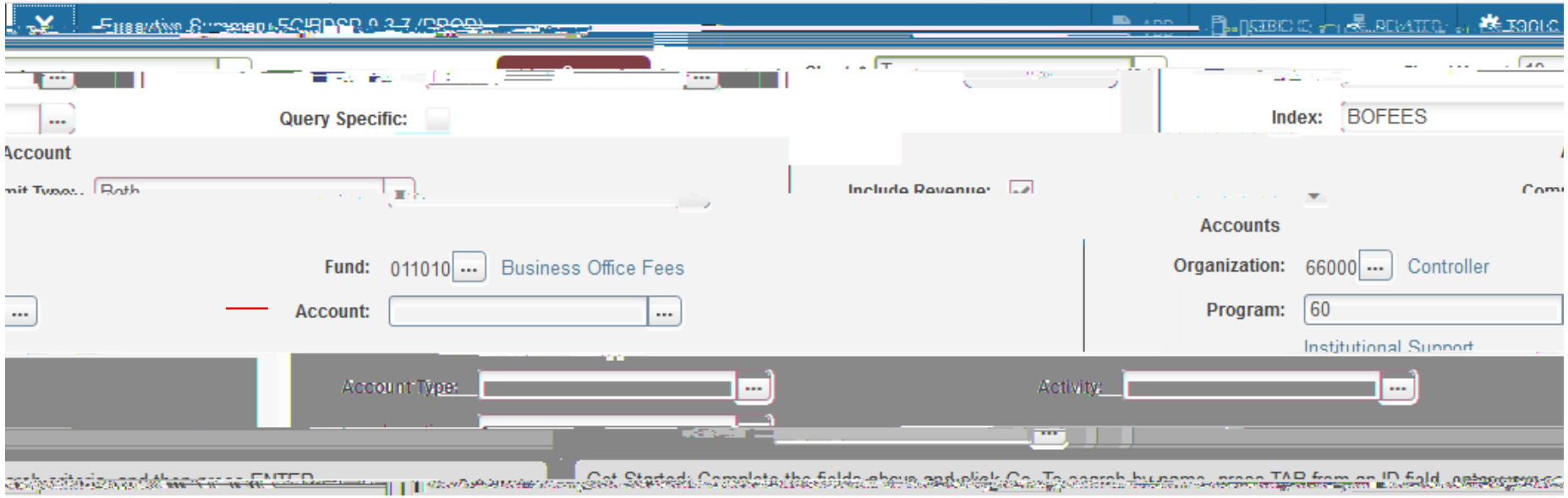
# My Banner

My Banner Maintenance-GUAPMNU

Allows users to save and quickly access frequently used banner forms.

Once screens are added in GUAPMNU you can access saved forms by clicking on the applications button and then select “My Banner”.

Under Object Selection is a list of commonly used screens for all finance users. To add new screen(s) click in the object field on the right hand side and type the screen name (FGIBDSR), arrow down, type the next name, etc… Once done click save in lower right corner.



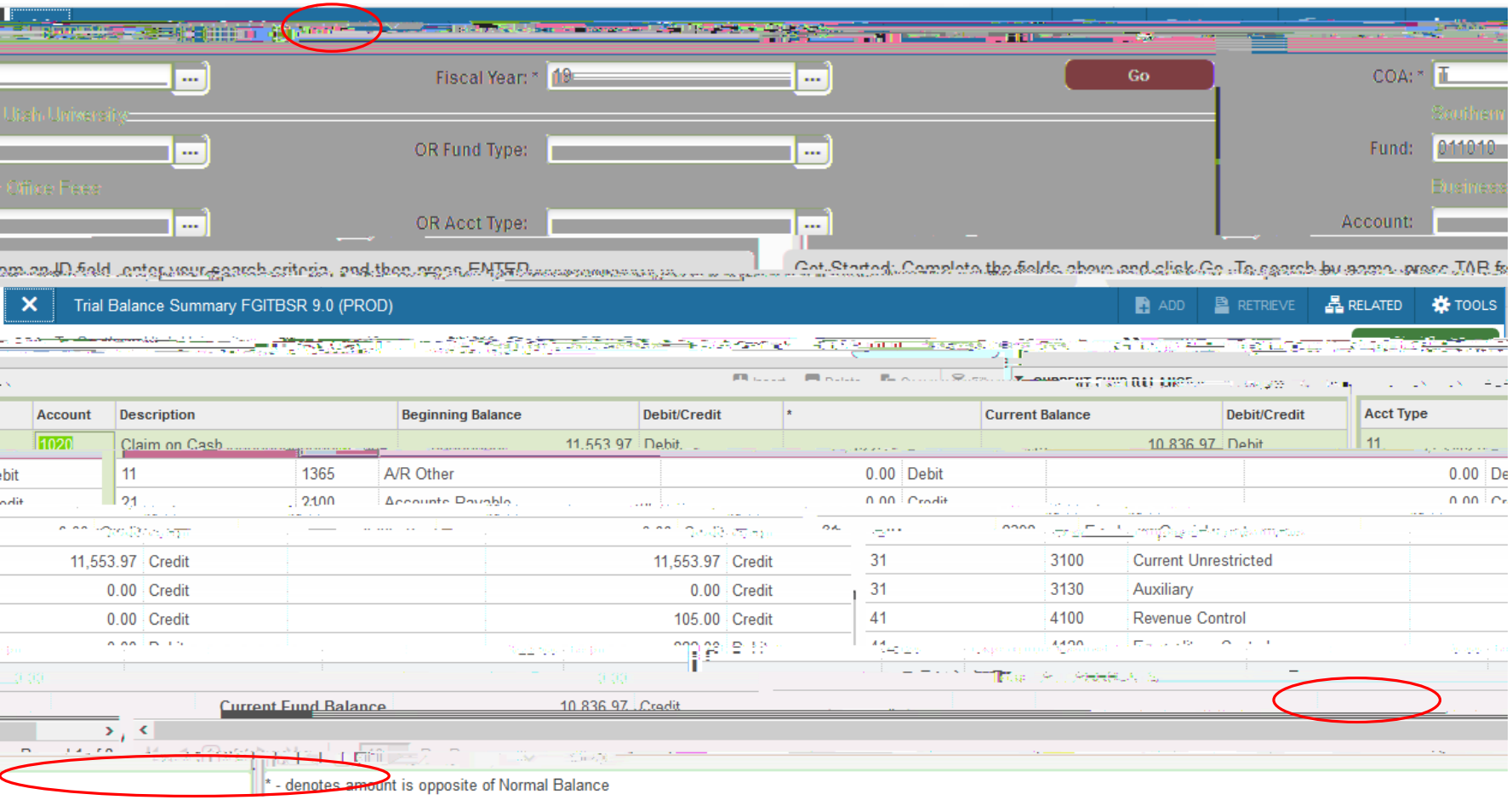

Access Form FGIBDSR – Executive Summary.

To broaden your search in FGIBDSR always delete the program code from your query.

You can use the account type field to narrow your query.

- Revenue – 50 – Will only show revenue accounts.
- Wages 62 – Will only show you hourly wages.
- Expenses 70 – Will only show expenses,

# How much money do I have available to budget in a non-appropriated fund?




Access form FGITBSR – Trial Balance Summary - list the fund number you wish to query and click Go

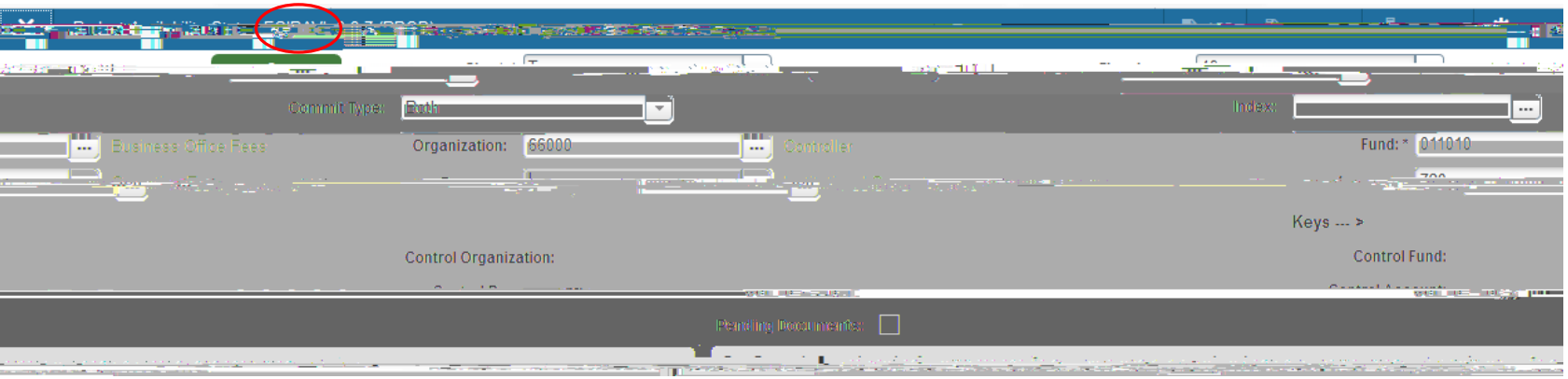
Bottom right hand corner shows the current fund balance. This is the money you have to spend.

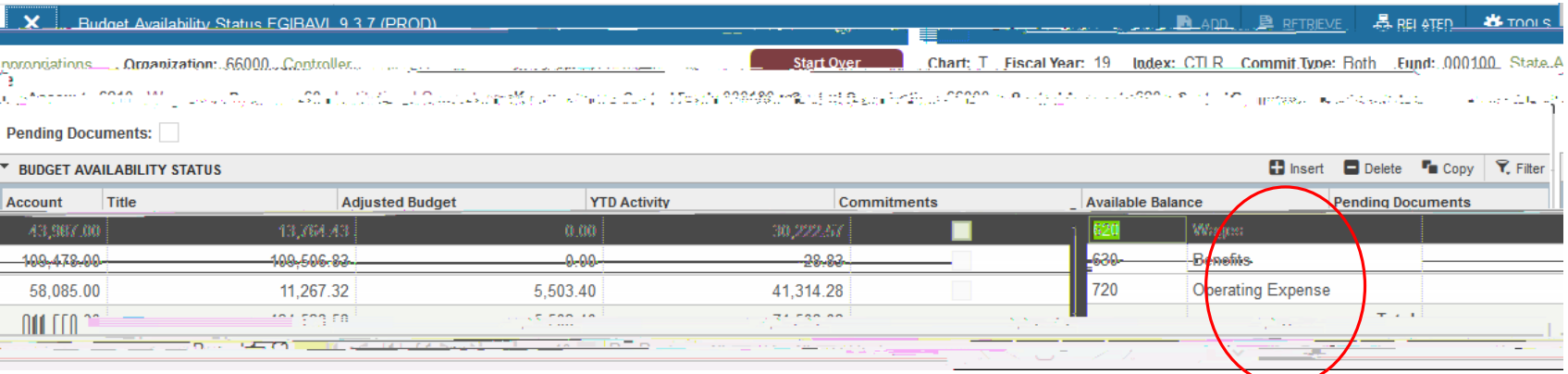
Balances in non-appropriated funds roll forward to next fiscal year.

This screen is not going to give you useful information for the appropriated fund (000100.)

An asterisk next to the fund balance means that you have overspent and have a deficit fund balance.

# How much available budget do I have to spend?
# I Cannot Submit a P.O. or travel due to insufficient budget.




Access Form FGIBAVL – Budget Availability Status

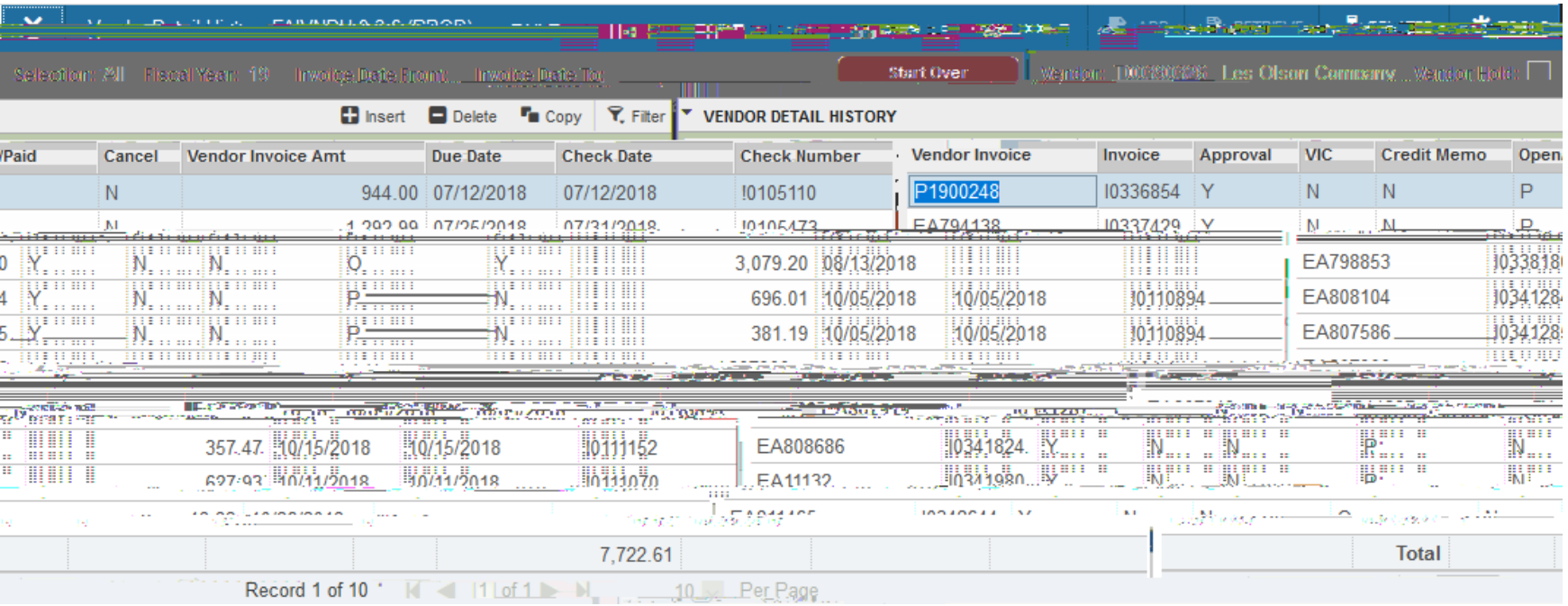
Input FOAP to query in key block and click Go
Input must include account code.

- 620 – Wages
- 720 – Operating Expense
- 750 – Travel

Right hand column shows the available (or overspent) balance for each expense type.

The travel and purchasing systems look here for budget availability before allowing you to submit a requisition.

FGIOENC – Organizational Encumbrance - allows you to see all outstanding




FAIVNDH – Vendor Detail History - will show you what has been [illegible]

# Useful Querying Information

Most everything in banner is searchable

Press F7 within any form to enter Query Mode

Use the dropdown menu to select field(s) you want to query

After each field you can you can use the search following operators

- Contains
- Like
- Starts / Ends With
- Equals / Not Equal
- Not Equal or is NULL
- Is NULL / Is not NULL

Press F8 to execute query and provide results

# Banner Admin Shortcuts

F3 – Drill down to transaction detail (Grant screens use F4)

F4 – Copy previous record

F5 – “Start Over” – Back to key block of current form.

F6 – Insert new record

Shift+F6 – Delete Record

F7 – Enter Query