Banner Finance for Beginners Rev – Starting in February 2018

Session 1 – Banner Finance – Getting started in Self Service - Budgets (2 hours)
- Req to Check Process
- Navigate SS
- Budget in SS
- Budget transfers – SS
- Open encumbrances – SS

Session 2 – Banner Finance – Requisitions (2 Hours)
- Requisitions in SS
- Create, Retrieve and Delete Requisition Templates in SS
- View Docs, see history – SS

Session 3 – Banner Finance - Getting started and Receiving in Banner 9 (2 Hours)
- Navigate Banner 9
- My Banner – Banner 9
- Set Preferences – Banner 9
- Receiving in Banner 9
- FOIDOCH - Banner 9

Session 4 – Banner Finance – Next steps – Budgets and Requisitions (2 hours)
- FGIBDST – Budgets - Filtering, using Rule Codes, Downloading to Excel
- FGIBAVL – Check Pending Documents
- FGIOENC – Open Encumbrances
- Requisitions – Banner 9
- Completing or deleting incomplete documents in Banner 9

Session 5 – Banner Finance – Beyond the Basics in Banner 9 (2 hours)
- FOADOCU – Document b User
- Copy and Reuse Requisition
- Commodity Level Accounting
- FPPIPKS - Review Receiving Codes
- FTIIDEN – Search for Vendor ID
- FAVNDH – Vendor History
- FAIVNDH – Invoice/Credit Memo list
- FOIVEND – Vendor List
- FGIOENC – Open Encumbrances – Drilling for Details
- FGIECND – Detailed Encumbrance History
- FPIPOV – Purchase Orders by Vendor