

UA Tips for BANNER Research

BANNER Facts:

- BANNER has over 1,000 screens; forget about them, learn the 4-5 you need to know
- BANNER has an extensive menu; don't use it – you know where you want to go
- BANNER doesn't have all you need to know, but it does have good basic info you can use

BANNER Codes:

- GRANT – a specific grant, usually 7 digits beginning with either 'GR' or 'GS' for Contracts and Grants
- FUND – a budget authorization of a grant; a single grant may have multiple funds. Grant funds begin with a 2 or 7.
- ORGN – the organization number to whom the fund belongs, a fund can only belong to one organization
- PROG – a code identifying the fund as research, public service, instruction or fellowship/scholarship. A fund should have only one program code

BANNER Screens you Need to Know:

- FRIGITD – Point-of-entry for all Grant Financial information
- FRIGRNT – Grant listing per PI
- FRAGRNT – Information about a specific grant
- FRIGTRD – breakout of actual expenditures
- FTMFUND – for fund associated with a grant and gives the appropriate financial manager
- FRMFUND - inquire if fund has IDC

Banner Navigation:

- BANNER is windows-based, standard commands apply
- To access a screen while already in an existing screen, go to "File" menu and click on "Direct Access"
- There are two methods to execute a query (NEXT BLOCK) – "F8" or "Ctrl + Page Down"
- BANNER has a "rollback" button; it takes you back one command and doesn't change screens
- Using the "cancel" button closes screen and takes you back to previous screen
- % = wildcard search



1. FRIGITD – How do I see my Grant Budget? What is my available balance, what are my actual expenditures, etc?

- Entry point for all financial information
- Can be accessed from the direct access screen by typing FRIGITD
- Tab to "Fund" and type in fund number. The grant number, organization and program code will automatically appear. Tab to "Program" and DELETE the code. Do NEXT BLOCK or CTRL + Page Down which will give you the most up to date information.

Account Type	Adjusted Budget	Activity	Commitments	Available Balance
60100	19,942.28	19,942.28	0.00	0.00
601190	5,393.15	5,393.15	0.00	0.00
605111	0.00	0.00	0.00	0.00
605220	255.98	255.98	0.00	0.00
605230	1,254.24	1,254.24	0.00	0.00
605310	1,842.52	1,842.52	0.00	0.00
605320	1,266.76	1,266.76	0.00	0.00
605410	743.16	743.16	0.00	0.00
605500	40.07	40.07	0.00	0.00
605510	0.01	0.01	0.00	0.00
605515	97.89	97.89	0.00	0.00
605550	15.21	15.21	0.00	0.00
720	0.00	0.00	0.00	0.00
729101	258.96	258.96	0.00	0.00
Net Total:	31,110.23	31,110.23	0.00	0.00

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2. FRIGITD –How to review financial information without so much detail?

- FRIGITD allows a quick look at grant available balance
- Follow steps from item #1 for entering grant and fund
- Set “Account Summary” to ‘Level 2 Acct Types’
- Do “CTRL + Page Down” or Next Block

Account Type	Description	Adjusted Budget	Activity	Commitments	Available Balance
88	Salaries and Wages	25,339.43	25,339.43	0.00	0.00
89	Benefits	5,515.84	5,515.84	0.00	0.00
71	General Operating Expenses	5,149,159.07	5,149,159.07	0.00	0.00
71	Indirect Cost/Cost Share	20,278.15	20,278.15	0.00	0.00
Net Total:		5,200,287.49	5,200,287.49	0.00	0.00

3. FRIGITD –How do I review specific category balances such as travel or supplies?

- Type FRIGITD from Direct Access screen
- Follow steps in Item #1 for entering grant fund
- Tab to “Account” and type the category such as 720 for Travel
- Click hierarchy on right side
- Do CTRL + Page Down or NEXT BLOCK
- Categories:
 - 601 Supplies
 - 605 Benefits
 - 710 Supplies
 - 720 Travel
 - 730 Meetings and Conferences
 - 740 Services/Professional Fees (sub-contracts)
 - 791 Equipment

Account Type	Description	Adjusted Budget	Activity	Commitments	Available Balance
720	Travel	0.00	0.00	0.00	0.00
72001	Travel-Congressional Legacy	256.96	256.96	0.00	0.00
Net Total:		256.96	256.96	0.00	0.00

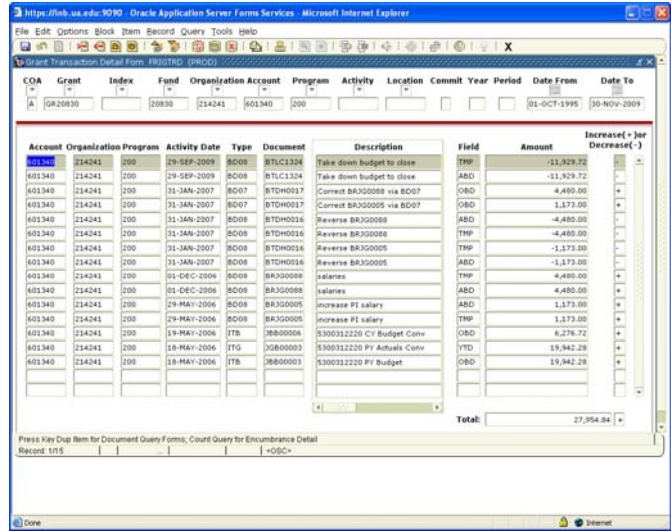
Other tips on using FRIGITD:

- Specific period can be defined using the “DATE FROM” and “DATE TO” fields
- When changing codes or requests, always use the ROLLBACK arrow button
- Please note: Budgets are entered at the beginning of an award or in increments. To review the budget, look at all information TO DATE for grant

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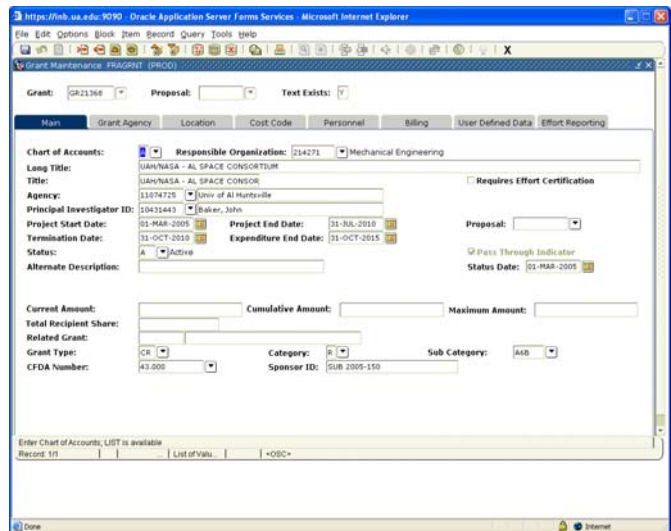
4. FRIGTRD – How do I see my actual expenditures, etc?

- Type FRIGTRD on the direct entry screen
- Type in the grant number and the fund number
The Org and Prog will automatically default. Click to program and delete the program code
- Tab to “DATE FROM” and “DATE TO”. Key in the month that you are wanting to review expenditures such as for the month of October (10012009 on Date from and 10312009 on Date to)
- Do “CTRL + Page Down” or Next Block
- Tab to the column entitled Field and type in YTD for actual expenditures
- Click F8 to reveal the actual expenditures for the month of October



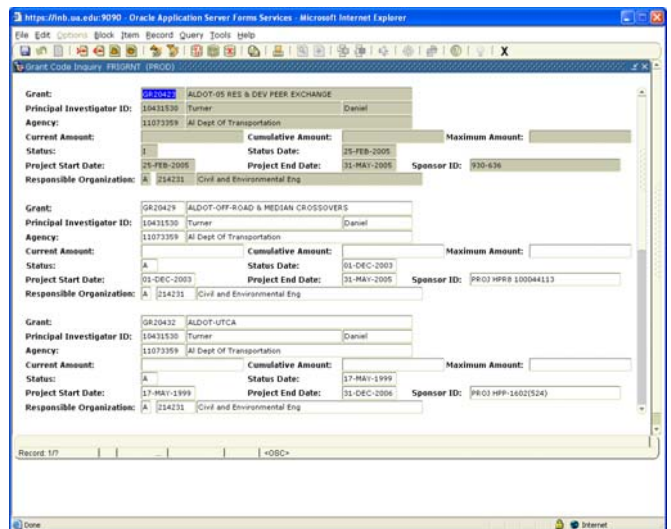
5. FRAGRNT – What do I know about my grant?

- Basic information about any grant can be accessed by using the Direct Access functionality by typing FRAGRNT
- You can find the START and END date of your award, PI, awarding Agency, Sponsor ID given by sponsor
- You can also see who handles your grant in C&GA. Click on the Personnel tab and use your arrow key to find the 03 indicator or Financial Analyst



6. FRIGRNT – Where can I get a list of all my active grants?

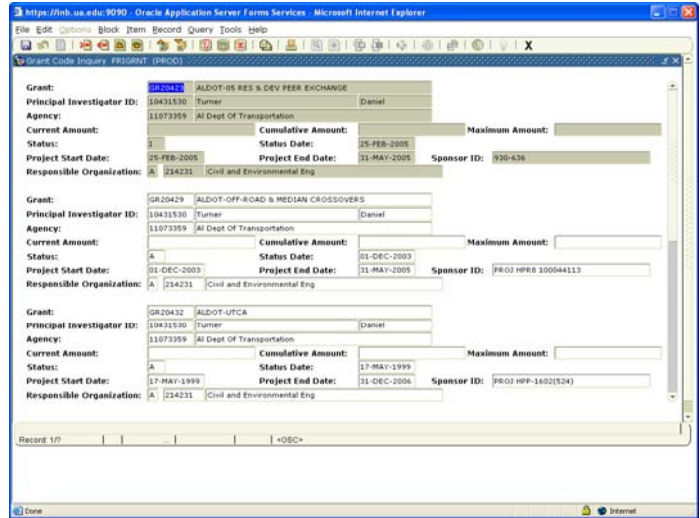
- FRIGRNT is the place to get a complete listing of your grants. This data can be exported to Excel
- To use the form, click to the 2nd block beside Responsible Organization and type in the ORG
- Click on block beside status and put in A for active
- Do F8 to return a list of all grant(s) assigned to the ORG selected
- To export data, go to HELP, hold down the CTRL key and then click on EXTRACT DATA NO KEY. Continue to hold down the CTRL key until a File download box appears. Click OPEN. You can manipulate the data within Excel



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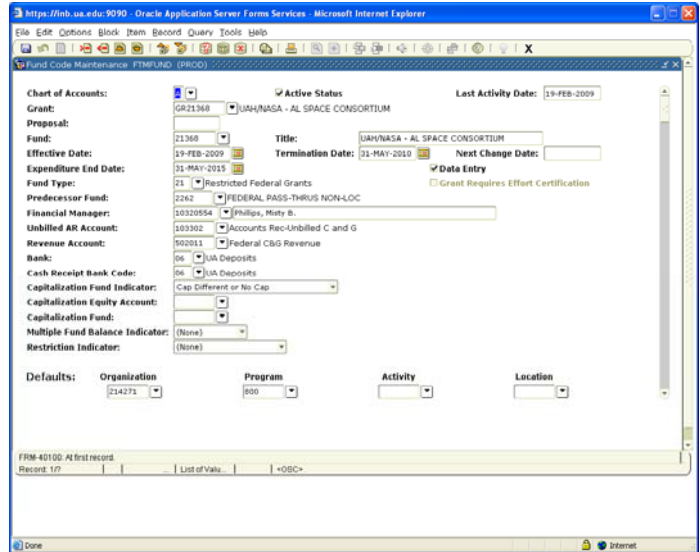
Other tips for using FRIGRNT:

- Pull reports by PI, End Date, Agency, Sponsor ID, etc
- As an example by PI, tab to 2nd block beside PI ID and type in PI Last Name and hit F8 execute query



7. FTMFUND – How do I get information on funds associated with a grant?

- FTMFUND lists basic info plus all funds associated with a grant
- Can be accessed by typing FTMFUND in the Direct Access screen
- When using FTMFUND, type in the Grant number and then F8 to return the results
- Tab down to FUND field and hit down arrow button to view if multiple funds are linked to the grant



8. FRMFUND – How do I know if my fund has IDC (indirect costs)?

- From the Direct Access screen, type in FRMFUND
- Click F7 to clear query
- Tab to "FUND" and type in fund number
- Click F8 to execute query

