

Querying Data in Internet Native Banner (INB)

Training Goals

- Identify the Commands & Icons to query data
- Search using wildcard "%" or "_" function
- Understand Query process using the forms FGIBDST and FGITRND



Query Commands & Functions

| Icon | Keyboard Command | Banner Menu Option | Purpose |
|------|---------------------|------------------------|--|
| | F7 | <u>E</u> nter | Puts the form into Query mode so you can enter search criteria to see information already in the database. |
| | F8 | E <u>x</u> ecute | Executes the Query and searches the database and displays records that match your search criteria. |
| - | - | <u>L</u> ast Criteria | Enters the criteria from your last search (Enabled only when you are in Query mode). |
| X | Ctrl + Q | <u>C</u> ancel | Cancels the Query and takes the form out of Query mode. |
| - | - | Count <u>H</u> its | Counts the number of records that match the search criteria and displays that number on the Auto Hint line. |
| - | - | <u>F</u> etch Next Set | If more records meet the search criteria that fit in the window, clicking this option replaces the current set of displayed records with the next set. |



Query Using Wildcards

Wildcards - You can use these wildcards with queries:

- "%" (percent sign) represents any number of characters
- "_" (underscore) represents one occurrence of a character

Procedure - Follow these steps to perform a query.

| Step | <u>Action</u> |
|-------------|---|
| 1 | Access the Banner form from which you want to perform a query. |
| 2 | Perform an Enter Query function to put the form in query mode. |
| 3 | Enter the data you wish to find, using wildcards if appropriate. |
| 4 | Perform an Execute Query function to find search results. |

Where do you Query?

Query from a drop down menu; or

Query from a Banner form



Querying on the Index field illustrates the "drop down menu" method. Select the "down arrow" located to the right of the Index field and a pop-up box of selections will open.

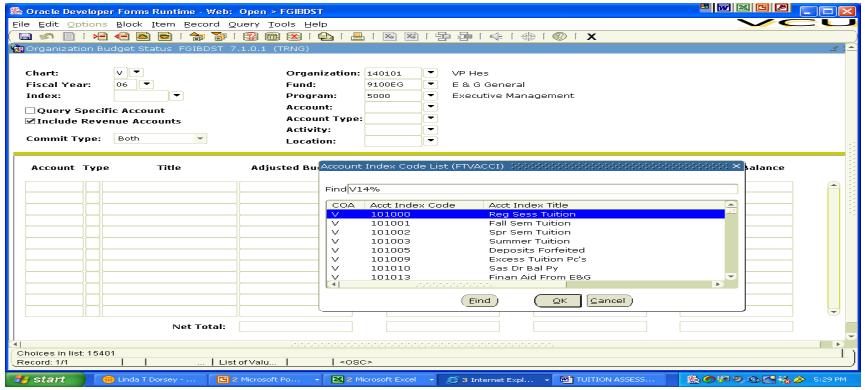
| Eile Edit Options Block Item Record Query Tools Help Organization Budget Status FGIBDST 7.1.0.1 (TRNG) Chart: V | ations Block Item Record Query Tools Help | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
| Chart: V Organization: 140101 VP Hes Fiscal Year: 06 Fund: 9100EG E & General Index: Program: 5000 Executive Management Query Specific Account Account: Account Type: Activity: V Commit Type: Both Location: V Account Type Title Adjusted Bu Account Index Code List (FTVACCI) Find % | Seems Breez from Decora Zaerk Tools Delb | | | | | | | | |
| Chart: V Organization: 140101 VP Hes Fiscal Year: 06 Fund: 9100EG E & G General Program: 5000 Executive Management Account: Account Type: Activity: Commit Type: Both Account Type Title Adjusted Bu Account Index Code List (FTVACCI) Find(% COA Acct Index Code V 101000 Reg Sess Tuition V 101001 Fall Sem Tuition Spr Sem Tuition | | <u>B</u> [<u>B</u> <u>B</u> · · · · · · · · · · · · · · · · · · | | | | | | | |
| Fiscal Year: 06 Fund: 9100EG Executive Management Query Specific Account | | | | | | | | | |
| Fiscal Year: 06 Fund: 9100EG Executive Management Query Specific Account | | | | | | | | | |
| Index: Query Specific Account Account: Include Revenue Accounts Account Type: Account Type Title Adjusted Bur Account Index Code List (FTVACCI) Account Type Find% COA Acct Index Code Acct Index Title V 1010001 Reg Sess Tuition V 1010002 Spr Sem Tuition | V ▼ Organizatio | on: 140101 VP Hes | | | | | | | |
| Query Specific Account Account: Include Revenue Accounts Activity: Location: Account Type Title Adjusted But Account Index Code List (FTVACCI) COA Acct Index Code Find% COA Acct Index Code V 101000 Reg Sess Tuition V 101001 Fall Sem Tuition V 101002 Spr Sem Tuition | ar: 06 ▼ Fund: | 9100EG ▼ E & G General | | | | | | | |
| Query Specific Account Include Revenue Accounts Account Type: Location: Account Type Title Adjusted Bur Account Index Code List (FTVACCI) \$222222222222222222222222222222222222 | ▼ Program: | 5000 Executive Management | | | | | | | |
| Account Type: Both Location: Account Type Title Adjusted Bur Account Index Code List (FTVACCI) 5000000000000000000000000000000000000 | Account: | | | | | | | | |
| Account Type Title Adjusted Bu Account Index Code List (FTVACCI) SYSTEM Adjusted Bu A | | pe: | | | | | | | |
| Account Type Title Adjusted But Account Index Code List (FTVACCI) \$2000000000000000000000000000000000000 | | | | | | | | | |
| Find% COA Acct Index Code Acct Index Title V 101000 Reg Sess Tuition V 101001 Fall Sem Tuition V 101002 Spr Sem Tuition | ype: Both Location: | | | | | | | | |
| Find% COA Acct Index Code Acct Index Title V 101000 Reg Sess Tuition V 101001 Fall Sem Tuition V 101002 Spr Sem Tuition | | | | | | | | | |
| Find% COA Acct Index Code Acct Index Title V 101000 Reg Sess Tuition V 101001 Fall Sem Tuition V 101002 Spr Sem Tuition | Title Adicated Da Accoun | Int Index Code List (ED/ACCI) | | | | | | | |
| COA Acct Index Code Acct Index Title V 101000 Reg Sess Tuition V 101001 Fall Sem Tuition V 101002 Spr Sem Tuition V 101002 Spr Sem Tuition V V V V V V V V V | Type Title Adjusted Builder | alance | | | | | | | |
| COA Acct Index Code Acct Index Title V 101000 Reg Sess Tuition V 101001 Fall Sem Tuition V 101002 Spr Sem Tuition V 101002 Spr Sem Tuition V V V V V V V V V | Final | (a) | | | | | | | |
| V 101000 Reg Sess Tuition V 101001 Fall Sem Tuition V 101002 Spr Sem Tuition | Filla | [20 | | | | | | | |
| V 101001 Fall Sem Tuition V 101002 Spr Sem Tuition | | | | | | | | | |
| V 101002 Spr Sem Tuition | The state of the s | | | | | | | | |
| · · | | | | | | | | | |
| To | To the second se | 101003 Summer Tuition | | | | | | | |
| V 101005 Deposits Forfeited | | | | | | | | | |
| V 101009 Excess Tuition Pc's V 101010 Sas Dr Bal Pv | | | | | | | | | |
| V 101013 Finan Aid From E&G | | | | | | | | | |
| 1 20000000000 | | | | | | | | | |
| Find) (OK Cancel) | | Find OK Cancel | | | | | | | |
| | | St. Squeet | | | | | | | |
| | | | | | | | | | |
| Net Total: | Net Total: | | | | | | | | |
| √ | | \$ | | | | | | | |
| Choices in list: 15401 | | | | | | | | | |
| Record: 1/1 List of Valu <0SC> | st: 15401 | | | | | | | | |
| | st: 15401 | DSC> | | | | | | | |



Try searching for the Index 140101- In the "Find" field, enter **V14%**

- V Indicates the Chart of Accounts
- **14** First two digits of Index
- % Wild Card

Click on the "Find" button

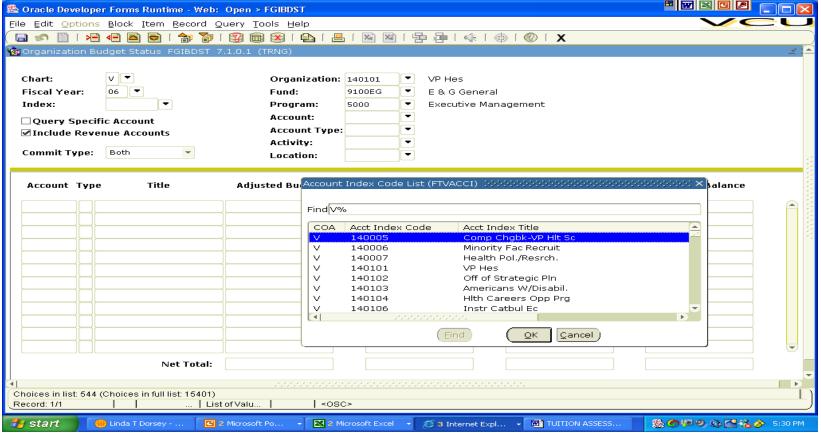




Returns all Index values beginning with "14"

Move cursor to 140101

Double click and 140101 will be placed in the Index field



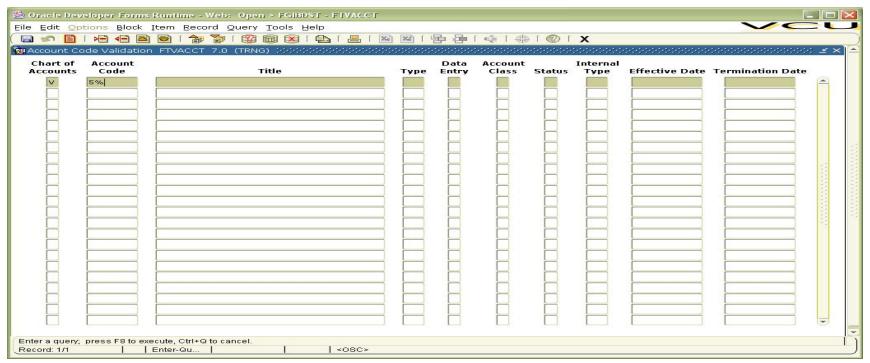


Querying from a form.

On FGIBDST Enter an Index value, for training purposes use 140101. Press the **Tab** key and move to the Account field Query on the **Account** field by clicking on the "down arrow". Form FTVACCT is displayed

Perform an **Enter Query** function to put the form in query mode. Enter the data you wish to find, using wildcards as needed. To query for Accounts beginning with "5" (labor)

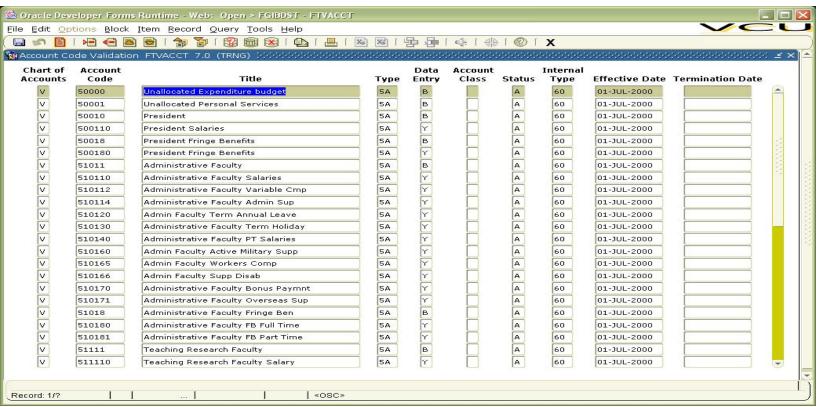
Enter V in the Chart of Accounts field and 5% in the Account Code field Perform an Execute Query function





The values are returned based upon the selected criteria.

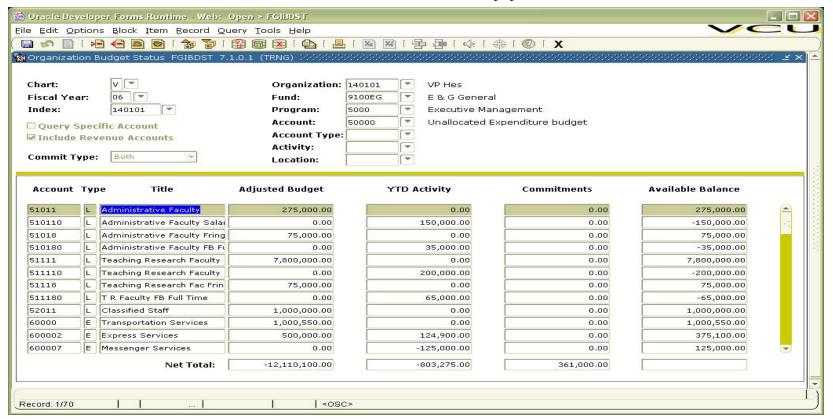
Double click on the **Title** field, which is highlighted, to return the value to the previous form.





Use the **NEXT BLOCK** function to display account information data in the Data Block section of the form using the selected account number.

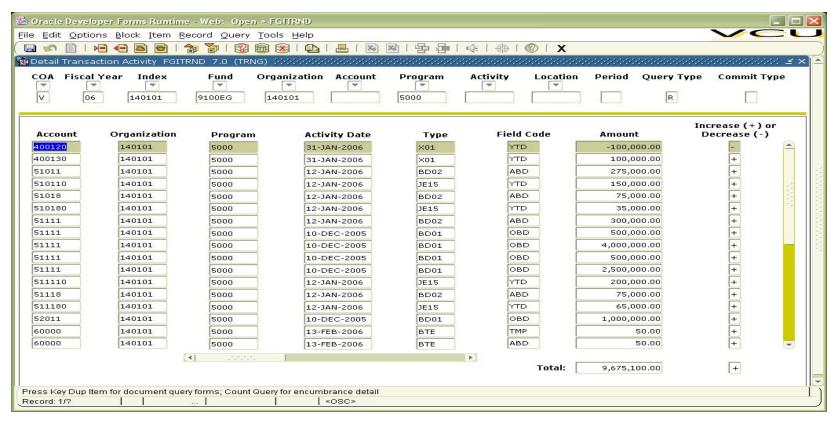
Note: The information begins with the Account selected and continues to display the remaining Accounts. The lower account values are not included in the selection when the form is populated.





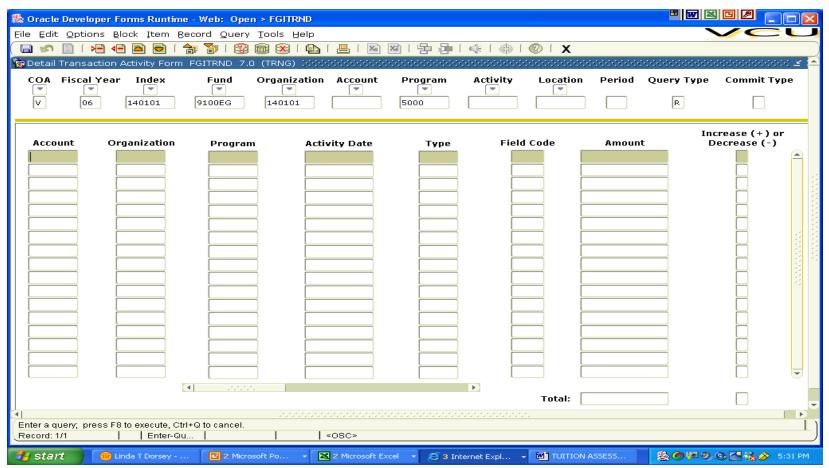
Enter an Index, for training purposes use 140101; **Tab** off the field Select **Next Block**

Press F8 to populate the Data Block fields.





Perform an **Enter Query** function to put the form in query mode with all the values cleared.

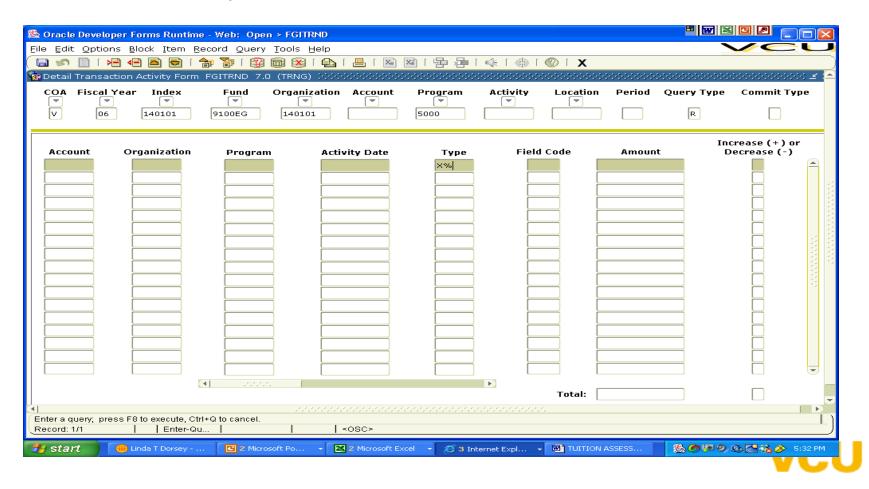




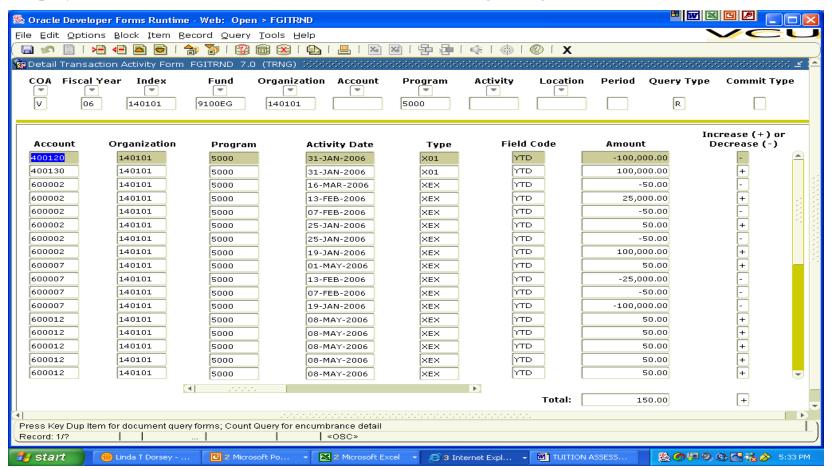
Tab to the Type field

Enter an **X%** in the **Type** field to find all types that begin with an "X".

Perform an **Execute Query** function to find search results



Displays all Account transactions with a **Type** value beginning with "X"





Need Additional Help with Banner Finance?

(No Audio-Information Only)

- Call the Banner Finance Help Desk at 828-0388 or <u>finsecurity@vcu.edu</u>
- Grants & Contracts Help Desk at 828-8104 or gcavcu@vcu.edu
- Procurement & Payment Help Desk at 828-1077 extensions 164 or 138 or evapurch@vcu.edu

