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Logging in to Banner

**Tip!** Banner works best with Explorer or Firefox (not Chrome).

1) You can get to the Banner Login page through VCU search which will lead you to the Banner Login and training resources located on the VCU Technology Services page. (*Figure 1*)

2) Another way is from the University Controller’s Office page which has its own set of Banner resources. (*Figure 2*)

3) However you login, you end up at the Banner main page. (*Figure 3*)

Definitions

A few concepts to get you started:

**Fund (Index) number** – can be used to subdivide funds associated with an award or grant.

**Grant code** – draws together all funds associated with an award or grant.

How do **Grant Codes** and **Fund(index) numbers** work together? The finances of an award or grant can be organized in many ways. One example, a grant for five years with two sub-awards would contain fifteen funds (indexes) which could all be combined into one grant code.
FRAGRNT (Grant Maintenance)

1) Each Banner form has a name which you type into the Go To box.

2) The first form we’ll look at is FRAGRNT which is used for grants maintenance.

3) And we’ll begin by entering a grant number. In this example, we’ll use 5470557F.

4) Then go to the Block menu and select Next.

5) And the Grant Maintenance record will populate.

6) Further information about the grant is organized in tabs: Main, Grant Agency, Location, Cost Code, Personnel, Billing.

7) Key pieces of information on the main tab include: agency and accountant. (Figure 4)

8) The accountant listed here will be your best post award point of contact.

9) Notice the project start and end dates.

10) As well as the grant type.

Tip! Click on the x to exit the current screen.
11) As you would expect, the **agency tab** will list the agency (or sponsor).

12) Cost code information, including the **indirect cost rate**, can be found on the cost code tab.

13) And select the **billing tab** to view the billing details.
FTMFUND (Financial Fund Code Maintenance)

1) We’ll look at the FTMFUND form next which is used for financial fund code maintenance.

2) Begin by entering FTMFUND in the Go To box.

3) On this form, we’re going to enter a query. So, go to the Query menu and select Enter Query.

4) Then enter the grant number. We’ll use 5470557FF again. (Note: FTMFUND can be queried by grant# or fund#.)

Tip! If the grant# is unknown, you can use the query by fund# feature to find out the grant#.

5) This time select Query Execute from the Query menu.

6) The form will populate and we’ll scroll to the bottom to get to the initial record that was created when the award was set up.

7) Notice there are eight records in this example.
8) Some key pieces of information to note include the termination date – the date after which no additional expenses should post. (Figure 5)

9) There are instances, however, when the termination date may be updated in Banner due to: internal processes, 90 Day Notice for a new award year, or a no cost extension.

Tip! In order to determine if a new award year or NCE was awarded, refer to FRMFUND to see if the budget period has been updated/revised. (FRMFUND will only be updated after approval is received from sponsor.)

10) The FA (Fiscal Manager) is also listed.

11) As you scroll up through the records, you will see the award has been extended (notice the termination date changing as you scroll up).
12) From here, you can get more information about the fund by selecting I/C Code Information from the Options menu.

(For example: the Indirect Cost Rate Distribute to Code which tells us the FACR is going to the School of Engineering and that the PI is under the Faculty Research Plan which gives new researchers more FACR to help with research initiatives.)

FRIGITD (Grant Inception to Date)

1) Now, we’ll look at FRIGITD for budget expenses and available balances.

2) Begin by entering FRIGITD in the Go To box.
3) Next, enter either the **Grant ID** or the **Fund (Index) Code**.

4) You can also specify a **Grant Year** or leave blank in which case all years will be displayed.

5) After entering your criteria, click **Block, Next**.

   Tip! Click roll back at any time to change your search criteria.

6) If the grant has more than one fund (index), you can also check **Fund Summary** to display a summary of each fund.

7) In this example, a date range has been specified, so one month of expenses (01/17) will display. (Figure 6)
Figure 6 FRIGITD – one month of expenses

8) Scroll to the bottom to see the cumulative totals.

Net Total: 500,008.39  193,018.79  53,316.99  253,672.70
9) To see more details about the grant, for example: Postdoctoral Wages, select **Grant Detail Information** from the Options menu.

10) And the **Grant Details** will display.
FGITBSR (Claim on Cash)

1) We’ll look briefly at the Claim on Cash screen.

2) Enter FGITBSR in the Go To box to go to the Trial Balance Summary screen and view the Claim on Cash.

3) We’ll enter the COA, Fiscal Year, and Fund (Index) number 47557S, then tab, then Block Next.

4) And the top line, Claim on Cash, will display how much cash needs to be received on this particular fund.

5) FGITBSR displays balances based on the fiscal year.

FRAAREV (Billing & Payments)

1) Enter FRAAREV in the Go To box.

2) Next, we’ll enter the grant number which is a flow through.
3) Then, Block, Next.

4) And the billing and payment details will display.

FRIBDET (Cumulative Summary)

1) The last screen we’ll look at will be a cumulative summary.

2) Select Block, Next after navigating to FRIBDET.

3) And the cumulative summary for the grant will display.

Setting up My Banner

1) Now, you will want to add the forms we reviewed to My Banner for quick access.

2) Click on My Banner

3) Then Empty, Select to build
4) Enter the form name. We’ll start with **FRAGRNT**. Then tab and the description will automatically fill in.

5) Now, you can see I’ve entered all six.

6) Then click save and exit the screen.

7) You will have to exit Banner and log back in, then you’ll have quick access to the forms you use the most often.

**Banner Training Resources**

1) Additional Banner training resources can be found on the [University Controller’s Office site](#).