AGENDA

SLU Business Manager Meeting
September 14, 2006
Medical School Lecture Hall A
9:00a.m.-10:30a.m.

1) Meeting Overview/Announcements: Linda Pizzo (Bantle)

2) Banner 7.3 Upgrade Presentation and Q&A:
   Jeff Kapp, Jennifer Haegle and Lisa Zoia

3) Business Process Improvement Discussion: Linda Pizzo (Bantle)
Meeting minutes of the Saint Louis University Business Managers held at 9:00 a.m. on Thursday, September 14, 2006 in the Medical School Lecture Hall A.

**Business & Finance Staff Present:**

- Bryan Pini
- Lisa Zoia
- Lee Kneibert
- Vicki Cassady
- Tom Meadows
- Linda Pizzo
- Sharon Gajewski
- Greg Haney
- Tawnya Musial
- Margaret Fisher
- Mary Drexl
- Paul Mueller
- Marsha McBride
- Lisa Zoia
- Linda Pizzo
- Margaret Fisher
- Marsha McBride
- Paul Mueller

**Guests in attendance:** Ellen Watson, Keith Hacke, Jeff Kapp and Jennifer Haegele.

**Number of Business Managers Present: 70**

Linda Pizzo welcomed everyone to the meeting and had new Business Managers in attendance introduce themselves to the group. Members of the Business & Finance Division introduced themselves also.

**New Meeting Format**

After reviewing the survey results from the Business Managers, the monthly meetings will no longer include updates from the various Business and Finance Departments. The Business and Finance Website is being revamped and will include a section titled “What’s New”. Any changes or updates from the various departments within Business & Finance will be posted in this section. The website will also have an Amex Resource Page added. The changes should be complete by mid-October.

Focus Groups are being formed for Process Improvement purposes. A sign up sheet was passed around for Business Managers to sign up for focus groups for the following areas: Business Manager Training, Travel, AP, Payroll, Purchasing and Reporting. The groups will meet and report back to the Business Managers.

**IT – New Banner Version 7.3**

Jeff Kapp, Director of ITS Enterprise Resources, addressed the Business Managers to give an overview of the new Banner Version 7.3 which will be live Monday, October 16th. He thanked the group for their time. Jeff said there are various walk-in sessions scheduled on campus next week for users to explore the new version and learn to navigate the system. Jeff strongly encouraged all users to log on to the test version through the University Gateway Portal to make sure they have access. Any problems logging on need to be reported to the IT Help Desk as soon as possible to eliminate down time on Monday, October 16th. The new version will still have the same basic functionality but an enhanced appearance. There are tips on the Gateway Portal that will allow for the best viewing of the new system. It was suggested to add a link to WebExtender to the Gateway Portal home page. Jeff agreed that was a good suggestion and will work to get that set up.

Jennifer Haegele reviewed the Internet Native HR screens. There are no major changes to the process but several enhancements to make navigating the screens easier. More information on the screens and icon changes can be found on the HR website under the Banner button. The major change is that tabs are used to navigate from screen to screen instead of using the Next Block function. Jennifer reported that the new version does not include a feature for automatic notification when an EPAF is in a user’s queue, but they are looking at a workflow feature that may allow for that function.

Lisa Zoia reviewed the revised financial forms in Internet Native Banner. As in the HR screens, these are now in a tab format and provide for easier navigation.
Business Process Improvement Discussion
Linda Pizzo opened the floor to discussion of business process concerns that can be addressed at future meetings and through the focus groups. The October meeting will feature Jennifer Haegele addressing EPAF issues. Items suggested for future meetings were:

- Automate the IDO process for both service departments and for general interdepartmental charges. Simplifying transactions between departments—explore if there is a way for one-on-one transactions between departments without involving Business and Finance.
- Simplify and clarify the Independent Contractor Agreement (ICA) process. (Currently purchasing is working with the General Counsel’s office to explore options.)
- Improve hiring and terminating process and develop a checklist of the full process. Identify by position the system access that is needed. Use the request for Banner Access as a prompt to enroll in training.
- Establish a key contact list—“Who to call for phones, moving, etc.” Post this in an easy to find location on the website.
- Sponsored Programs—Increase the number of grant accountants to improve on the time it takes to get an account number for charges to the grant. (Two new accountants came on board last month.) Improve Time & Effort reporting. Dan Miller from Sponsored Programs is coordinating a new system eRS Dashboard, which improves the time and effort process. There is a tutorial program available with the program.
- A request was made that Purchasing be able to compile the purchasing activity of a department without having to contact the department and asking them for usage numbers. Tawnya Musial from the Purchasing Department reported that the current version of Banner does not have the capability to capture these usage figures but it has been requested to be included in future versions.

Linda will coordinate follow up on all of the above mentioned topics/concerns and provide a timeline to address these issues.

The meeting ended at 10:40 a.m.

Minutes respectfully submitted by Mary Drexl.
# Banner Finance
## Internet Native Banner (INB) Forms and Self Service Banner (SSB) Queries

<table>
<thead>
<tr>
<th>INB</th>
<th>Form Purpose</th>
<th>Comparable SSB Query</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purchase Requisitions</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>FPAREQN</strong></td>
<td>Requisition Entry</td>
<td>Enter, modify, copy, and delete requisitions.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>FOAPOXT</strong></td>
<td>Procurement Text Entry</td>
<td>Add/modify document or line item text for in-process requisitions or completed requisitions that are routing for approval.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>FTIIDEN</strong></td>
<td>Entity Name/ID Search</td>
<td>Search on a vendor name to determine if the vendor exists in Banner.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>FPARDEL</strong></td>
<td>Requisition Cancel</td>
<td>Cancel an approved requisition that has not yet been transferred to a purchase order.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>FPIORQF</strong></td>
<td>Open Requisition by FOAPAL Query</td>
<td>View a list, by fund number, of requisitions that are in process or in approvals.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Fund Summary and Transaction Detail</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>FGIBSUM</strong></td>
<td>Organization Budget Summary</td>
<td>View summary fund information (Adjusted Budget, YTD, Commitments, Available Balance) by revenue and expense categories</td>
<td>Operating Ledger Query Budget Status by Organizational Hierarchy</td>
</tr>
<tr>
<td><strong>FGIBDST</strong></td>
<td>Organization Budget Status</td>
<td>View individual revenue and expense account code totals for a specific fund.</td>
<td>Operating Ledger Query Account Code Detail</td>
</tr>
<tr>
<td><strong>FGITRND</strong></td>
<td>Detail Transaction Activity</td>
<td>View transactions for a specific fund by fiscal period or transaction type.</td>
<td>Operating Ledger Query Transaction Detail</td>
</tr>
<tr>
<td><strong>Encumbrance Detail</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>FPIOPOF</strong></td>
<td>Open Purchase Orders by FOAPAL</td>
<td>View list of open purchase orders by fund number (original amounts by line item and any change orders).</td>
<td>Encumbrance Query</td>
</tr>
<tr>
<td><strong>FGIOENC</strong></td>
<td>Organizational Encumbrance List</td>
<td>View list of current commitments (general encumbrances, purchase orders, salaries, approved requisitions) by fund number.</td>
<td>Encumbrance Query</td>
</tr>
<tr>
<td><strong>FGIENC</strong></td>
<td>Detail Encumbrance Activity</td>
<td>Query by document number to view status (open or closed), FOAPAL invoice number, and all transaction activity associated with an encumbrance.</td>
<td>Encumbrance Query</td>
</tr>
<tr>
<td><strong>Miscellaneous</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Form</td>
<td>Form Description</td>
<td>Form Purpose</td>
<td>Comparable SSB Query</td>
</tr>
<tr>
<td>----------</td>
<td>----------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>FOIDOCH</td>
<td>Document History</td>
<td>View status of purchase requisitions and disbursement documents (e.g., purchase order number, Banner invoice document(s), and check number(s) associated with a requisition; check number associated with a DPV or BEEV).</td>
<td>View Document</td>
</tr>
<tr>
<td>GUAMESG</td>
<td>General Message</td>
<td>View messages entered by requisition approvers (e.g., reason(s) for denying the document).</td>
<td>N/A</td>
</tr>
</tbody>
</table>
PAYMENT METHOD REQUESTS:

**INB Requisitions:**
**STANDING ORDER (SO)** -- Use for purchases made on a regular basis (ex: Chartwell’s, Coca-Cola, Corporate Express)

**PURCHASE ORDER (PO)** -- Use for any vendor who can bill us with an invoice

**CHECK ENCLOSED ORDER (CO)** -- Use for a vendor who requires payment prior to providing services or delivering product.

***Do not use CHECK ENCLOSED ORDER for a past-due invoice. Past Due invoices should be processed on a PURCHASE ORDER. Obtain your purchase order # from the system/purchasing, write it on your past due invoice and fax the invoice directly to accounts payable for processing at 977-2298.***

**Other Forms:**
**DIRECT PAYMENT VOUCHER (DPV)** -- Use for payments to INDIVIDUALS . . . primarily for non-employee compensation. Payments to corporations and other organizations can generally be requested via one of the purchase orders (SO, PO, or CO).

***You can continue to use the DPV for payments to corporations/organizations for dues/subscriptions and other items detailed on the DPV paper form. However, we anticipate changing that policy as the P-card is rolled out. At this point, we anticipate continuing to use DPV's for licenses, speaker fees, honoraria, prizes, and awards after P-card implementation. Other payments to corporations will be expected to be processed via one of the purchase order formats or via the P-card.***

**BUSINESS & ENTERTAINMENT VOUCHER (BEEV)** -- Use for B&E within 50 mile radius.

**ELECTRONIC TRAVEL EXPENSE REIMBURSEMENT VOUCHER (ETERV)** -- Use for T&E outside 50 mile radius.
Banner Upgrade

Presentation to the Business Managers Meeting

September 14, 2006
University Project

- Get current
- Better screen layouts; easier to move around/between screens
- Some new features
  - New capabilities for integration with portal
    - channels for self-service
    - simplified sign-on
- Technically prepared for Banner 8.x
For Human Resources forms, new format, but no change in the functionality.
All forms now have a re-arranged icon bar.
Some forms have new “tabbed” appearance.
Some forms have a new layout
Introducing NBAJOBS

Version 7
The new & improved Employee Jobs - NBAJOBS!

<table>
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<tr>
<th>Effective Date:</th>
<th>Personnel Date:</th>
<th>Status:</th>
<th>Title:</th>
<th>Job FTE:</th>
<th>Appointment Percent:</th>
<th>Encumbrance Hours:</th>
<th>Encumbrance Indicator:</th>
<th>Hours per Day:</th>
<th>Employee Class:</th>
<th>Leave Category:</th>
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<th>Employer Code:</th>
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<td>01-AUG-2006</td>
<td>Active</td>
<td>Federal Work Study</td>
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<td>100.00</td>
<td></td>
<td>Value Input</td>
<td>3.00</td>
<td>63 FWS Student Web</td>
<td></td>
<td></td>
<td>SLU Saint Louis University</td>
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</tbody>
</table>

Pay Plan
- Group: 2006
- Grade: 999
- Table: UC
- Step: 0

Compensation
- Rate: 6.52500
- Hours per Pay: 30.00
- Assign Salary: 198.75
- Factor: 26.0
- Pays: 26.0
- Annual Salary: 5,069.50

Personnel Change Date: Format 'DD-MON-YYYY'.
- Record: 1/1
- <DBC>
### Employee Leave Balances - PEALEAV

**ID:** 000258872  
**Leave Category:** Staff Monthly

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<th>Leave Code</th>
<th>Date Available</th>
<th>Day or Hour</th>
<th>Begin Balance</th>
<th>Accrued</th>
<th>Token</th>
<th>Current Available</th>
<th>Banked</th>
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</thead>
<tbody>
<tr>
<td>HOLD</td>
<td>22-DEC-2004</td>
<td>H</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
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<tr>
<td>Change Reason: PHFLPDT program updated hours accrued, taken and banked.</td>
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</table>

<table>
<thead>
<tr>
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<th>Date Available</th>
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<th>Token</th>
<th>Current Available</th>
<th>Banked</th>
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<tbody>
<tr>
<td>SICK</td>
<td>22-DEC-2004</td>
<td>H</td>
<td>272.63</td>
<td>114.48</td>
<td>12.75</td>
<td>374.36</td>
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<td>Change Reason: PHFLPDT program updated hours accrued, taken and banked.</td>
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</tr>
</tbody>
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<th>Begin Balance</th>
<th>Accrued</th>
<th>Token</th>
<th>Current Available</th>
<th>Banked</th>
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</thead>
<tbody>
<tr>
<td>VAC</td>
<td>22-DEC-2004</td>
<td>H</td>
<td>79.34</td>
<td>143.99</td>
<td>104.00</td>
<td>115.33</td>
<td>.00</td>
</tr>
<tr>
<td>Change Reason: PHFLPDT program updated hours accrued, taken and banked.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The new & improved NOEAEPAF
The new look of NOAAPSM
New & Improved –
Transaction comments!!

Comment: Theresa is leaving Purchasing but will still be working for the Controller's department.

Date and Time: 28-FEB-2006 12:00:00 AM
Made By:
Questions about Banner HR?

- **HRIS@slu.edu**
- **Contact a staff member:**
  - Helen Abbott 977-2305
  - Jennifer Haegele 977-7184
  - Patty Taveras 977-2381
  - Nick Hebel (report requests, access) 977-2336
- **Visit the website for Banner resources:**
  - [www.slu.edu/services/HR](http://www.slu.edu/services/HR) and click on the Banner button
The new look of frequently used Business and Finance screens

Introducing Requisition Screens (FPAREQN)

- Requestor/Deliver Information
- Vendor Information
- Commodity/Accounting
- Balancing/Completion
### Requestor/Delivery Information

<table>
<thead>
<tr>
<th>Requestor:</th>
<th>Zola, Lisa M</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization:</td>
<td>D010</td>
</tr>
<tr>
<td>Phone:</td>
<td>314 9772394</td>
</tr>
<tr>
<td>Street Line 1:</td>
<td>Controller's Office</td>
</tr>
<tr>
<td>Street Line 2:</td>
<td>96 Frost Campus Receiving</td>
</tr>
<tr>
<td>Street Line 3:</td>
<td>3545 Lafayette Ave</td>
</tr>
<tr>
<td>Building:</td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td>St Louis</td>
</tr>
<tr>
<td>State or Province:</td>
<td>MO</td>
</tr>
<tr>
<td>Zip or Postal Code:</td>
<td>63104</td>
</tr>
<tr>
<td>Attention To:</td>
<td>Lisa Zola</td>
</tr>
</tbody>
</table>

Enter delivery comments (30 characters maximum): _<OSC>_
Commodity/Accounting

### Requisition Information
- **Requisition:** R0032804
- **Order Date:** 06-SEP-2006
- **Delivery Date:** 06-SEP-2006
- **Commodity Total:** 154.44

### Transaction Details
- **Transaction Date:** 06-SEP-2006
- **Comments:**
- **Accounting Total:** 154.44

### Item Information
- **Item:** 1
- **Commodity:** File folders
- **Description:**
- **U/M:** EA
- **Quantity:** 10
- **Unit Price:** 15.6
- **Extended:** 156.00
- **Discount:** 1.56
- **Additional:** 0.00
- **Tax:** 0.00
- **Commodity Line Total:** 154.44
- **Document Commodity Total:** 154.44

### FOAPAL Information
- **FOAPAL:** 1
- **Remaining Commodity Amount:** 0.00
- **NSF Override:**
- **NSF Suspect:**

### Additional Information
- **COA Year:** 07
- **Index:** 123123
- **Fund:** D010
- **Orgn:** 751600
- **Acct:** 0
- **Prog:**
- **Actv:**
- **Locn:**
- **Proj:**

### Version Details
- **Version:** 7
- Page 16
### Balancing/Completion

**Requisition Entry:**

- **Requisition:** E0032807
- **Order Date:** 08-SEP-2006
- **Delivery Date:** 06-SEP-2006
- **Commodity Total:** $154.44

**Vendor Information:**
- **Vendor:** 0000222960 Corporate Express Inc
- **COA:** 1 Saint Louis University
- **Organization:** D010 Controller
- **Currency:**
- **Exchange Rate:**
- **Commodity Record Count:** 1
- **Input Amount:** $154.44
- **Converted Amount:**

**Commodity/Accounting:**

<table>
<thead>
<tr>
<th>Input</th>
<th>Commodity</th>
<th>Accounting</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td>156.00</td>
<td>156.00</td>
<td>156.00</td>
<td>BALANCED</td>
</tr>
<tr>
<td>1.56</td>
<td>1.56</td>
<td>1.56</td>
<td>BALANCED</td>
</tr>
<tr>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>BALANCED</td>
</tr>
<tr>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>BALANCED</td>
</tr>
</tbody>
</table>

**Complete:** ✔

**In Process:** ✗

Select to mark this document *Complete*
Self Serv – View Documents

View Document

Document Identification
Document Number: R0062804
Type: Requisition
Originator: ZOIALM, Zola, Lisa M

Approvals required
Queue | Description | Level | Approvers
--- | --- | --- | ---
D010 | Controller | 30 | Haney, Gregory K, Meadows, Thomas
YFSV | Financial Services | 90 | Davis, LaDonna K, Kruse, Peggy A, Zola, Lisa M

No approvals have been recorded for this document.
Additional Finance Screens

- Open Requisitions - FPIORQF
- Document History - FIODOCH (with status indicators)
- Budget Summary - FGIBSUM
- Organization Budget Status – FGIBDST
- Detail Transaction Activity – FGITRND
## Budget Summary - FGIBSUM

<table>
<thead>
<tr>
<th>Account Type</th>
<th>Adjusted Budget</th>
<th>YTD Activity</th>
<th>Commitments</th>
<th>Available Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Labor</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct Expenditures</td>
<td></td>
<td>200.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Net: Revenue minus</strong></td>
<td>-10,000.00</td>
<td>-200.00</td>
<td>0.00</td>
<td>9,800.00</td>
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</tbody>
</table>

**Total Commitments:** 0.00
<table>
<thead>
<tr>
<th>Account</th>
<th>Type</th>
<th>Title</th>
<th>Adjusted Budget</th>
<th>YTD Activity</th>
<th>Commitments</th>
<th>Available Balance</th>
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</thead>
<tbody>
<tr>
<td>751000</td>
<td>E</td>
<td>Office Supplies</td>
<td>10,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>10,000.00</td>
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<tr>
<td>771001</td>
<td>E</td>
<td>Facil Services Chrgs</td>
<td>0.00</td>
<td>200.00</td>
<td>0.00</td>
<td>-200.00</td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
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</tr>
</tbody>
</table>

Net Total: -10,000.00

Controller: 0010
General Unrestricted Fund: 123123
## Detail Transaction Activity - FGITRND

<table>
<thead>
<tr>
<th>Account</th>
<th>Organization</th>
<th>Program</th>
<th>Activity Date</th>
<th>Type</th>
<th>Document</th>
<th>Original Budget</th>
<th>Field</th>
<th>Amount</th>
<th>Increase (+) or Decrease (-)</th>
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<tbody>
<tr>
<td>751060</td>
<td>D010</td>
<td>0</td>
<td>06-SEP-2006</td>
<td>BD01</td>
<td>X0707999</td>
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<td>OBD</td>
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<td>+</td>
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<tr>
<td>771061</td>
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<td>X0707999</td>
<td></td>
<td>YTD</td>
<td>200.00</td>
<td>+</td>
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</table>

Total: 10,200.00
Additional Finance Screens

- Open Purchase - FPIOPOF
- Organizational Encumbrance - FGIOENC
- Detail Encumbrance Activity – FGIENCD
Open Purchase Orders - FPIOPOF

Vendor: Tonercharge

Maintenance on 2 Printers in Controller's

Unit Price: $800

U/M: EA

Quantity: 1
<table>
<thead>
<tr>
<th>Encumbrance</th>
<th>Vendor</th>
<th>Item</th>
<th>Acct</th>
<th>Preg</th>
<th>Actv</th>
<th>Loca</th>
<th>Amount</th>
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<td>Tonarchge</td>
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<td></td>
<td></td>
<td>300.00</td>
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</tr>
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</table>

Press Key Duplicate Item for Detail Encumbrance Activity.

Record: 1/1...<OSC>
### Detail Encumbrance Activity - FGIENCD

**Encumbrance:** P0035873

**Description:** Tonercharge

**Date Established:** 01-MAR-2006  
**Balance:** 300.00

**Status:**  
**Type:** P

**Vendor:** 000006333 Tonercharge

### Item Information

- **Item:** 0  
- **Sequence:** 1

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<th>Actv</th>
<th>Locn</th>
<th>Proj</th>
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<th>Liquidation</th>
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</table>

### Transaction Details

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<th>Transaction Date</th>
<th>Type</th>
<th>Document Code</th>
<th>Action</th>
<th>Transaction Amount</th>
<th>Remaining Balance</th>
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<td>RENC0601</td>
<td>T</td>
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<td>500.00</td>
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<td>RENC0601</td>
<td>T</td>
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<td>500.00</td>
</tr>
</tbody>
</table>

Press Next Record or Previous Record to scroll accounting/transaction details.
Questions about Banner Finance?

- fin_serv@slu.edu
- Contact a staff member:
  - Peggy Kruse krusepa@slu.edu
  - Lisa Zoia zoialm@slu.edu
- Visit the Business and Finance website for Banner resources:
  - www.slu.edu/services/busfin
Overall information

Portal group for Banner Upgrade with links to:
- Navigational training
- EVAL test system for INB and SSB
- System documentation

Demonstration sessions

Brownbag sessions

Portal Access
Portal Access

Welcome to Saint Louis University.
This secure site provides students, faculty and administrative staff with world-class Intranet and Internet services. This is where you can check e-mail, register for courses, and explore the Internet.

What's Inside?

- **E-mail**: Send and receive e-mail, and create your own personal address book.
- **Calendar**: Access and manage your personal, course and school calendars.
- **Groups**: Create, manage and join group homepages for clubs, affiliations and interests.
- and much more...

Portal Access

Saint Louis University | Where Knowledge Touches Lives®
gateway.slu.edu
For Students

Welcome Jeffrey Kapp
You are currently logged in.

My Account Content/Layout Channel Admin
Welcome Jeffrey Kapp You are currently logged in.

Campus Announcements
There are no Campus Announcements

My E-mail Inbox
INBOX folder has (0) messages, (0) unread kappjd@slu.edu
You currently have no messages.

My Calendar
You have 5 events in your calendar today

SLU Banner and Other Systems

New Gateway Systems
- SLU Banner Self-Service
- SLU Banner System

Other Systems
- New WebFOCUS Dashboard
- Old WebFOCUS
- WebCT

PeopleFinder

Newslink Headlines
Portal Access

Group Links - Business Managers

Your Location: Group Homepage / Group Links

**Banner Upgrade 2006**

- **6.2 Banner INB (Production System)** (posted on May 11, 2006 by Jeffrey Kapp)
  Set for 640x480 screen resolution (Windows). Requires user to be on-campus or connect via VPN. Supported browser is either Safari (Mac OS X) or Internet Explorer (5.x or above).

- **6.2.2 Self-Service (Production system)** (posted on May 11, 2006 by Jeffrey Kapp)
  Login with your SLU #.

- **7.3 Banner INB (EVAL - non-production)** (posted on July 14, 2006 by Jeffrey Kapp)
  EVAL has all data from production (PROD) as of Friday, Aug 4 at 4:00pm. Set for 1024x768 screen resolution. Requires user to be on-campus or connect via VPN. Supported browser is either Safari (Mac OS X) or Internet Explorer (5.x or above).
  **Note:** First time into 7.3 system, Windows users must install a new Initiator file (ver. 1.3.1.22), ITS has attempted to push this to all current Banner user Windows desktops. If you do not get the Banner login screen, or if you do NOT have admin rights to your PC (can’t install software yourself), contact ITS Customer Service Center at 7-4000 to make arrangements.

- **7.3 Self-service (EVAL - non-production)** (posted on July 14, 2006 by Jeffrey Kapp)
  Login with your SLU ID# and PIN.

  EVAL has all data from production (PROD) as of Friday, Aug 4th at 4:00pm.

- **7.3 Training for Using Banner** (posted on August 23, 2006 by Jeffrey Kapp)
  This takes you to a computer-based training (CBT) about Banner 7.3 - new navigation, new help, new features. It will ask you to submit a first and last name, but you can bypass this. It offers a tutorial on how to use the CBT and it offers a pre-test to customize the training for you - both are optional. The CBT will NOT retain information from you from one session to the next. Some of the screens are dynamic. The section on customization is new and some of those customizations may not be available to everyone initially. The section on "7 Features and Differences" identifies some security features new to you - we will work to implement these shortly after the upgrade.

- **Banner 7 Bookshelf** (posted on May 22, 2006 by Michelle Pfann)

**September 01, 2006**
Version 7

Enhancement = Gateway Phase II

Upgrade to Banner 7.3

Improve

Leverage

Operationalize

Continuation of Business Process Improvements

Knowledge Transfer

Upgrade to Current Version
- Continued Vendor Support
- Enhanced Security Capabilities
- Improved User Interface
- Enhanced functionality

Leverage full potential of Banner & related products

Operationalize processes and Operationalize change
Next Steps

- Please spend time working with the new system, through the gateway portal
- Report problems through portal group prior to October 13th
- Help us make this work for all users
- Be ready for new look on Monday, October 16th
- Thank you for your help and work to date