

FINANCE SELF SERVICE QUICK REFERENCE

LOOKUP FUNCTION IN SELF-SERVICE

1. Log into Banner Finance Self Service
2. Select “Requisition” or “Budget Transfer” from the Finance menu
3. Scroll to the bottom of the page until you see the “Code Lookup” box
4. Define your parameters for your lookup as follows:
 - a. Chart of account code will always be “T.”
 - b. Enter the type of search you are conducting.
 - c. Enter the code criteria you would like to use, if any. Use wildcard (%) parameter on this search. See wildcard instructions below.
 - d. Enter the title criteria you would like to use, if any. Use wildcard (%) parameter on this search. See wildcard instructions below.
 - e. Enter the number of rows of information that you would like to see returned.
5. Press Execute Query.
6. Scroll to the top of the page, your query results will be displayed.

Code Lookup	
Chart of Accounts Code	T <input type="text"/> A
Type	fund <input type="text"/> B
Code Criteria	<input type="text"/> C
Title Criteria	Aid% <input type="text"/> D
Maximum rows to return	10 E

WILDCARD INSTRUCTIONS:

The wildcard function in Banner allows you to enter part of the code criteria or title criteria if you don't know the whole code or title. Below is a list of examples of how you use the wildcard search function for both codes and titles:

CODES

Example: I want to find my restricted fund number and I know that somewhere in the fund number is 213, but I don't know the rest of the number. How do I use the wildcard function??

- | | |
|--------------|---|
| 213% | (Displays all codes with “213” as the <u>first</u> numbers in the series) |
| %213 | (Displays all codes with “213” as the <u>last</u> numbers in the series) |
| %213% | (Displays all titles with “213” anywhere in the series) |

TITLES

Example: I want to find a vendor that I know has the word “General” somewhere in the vendor name, but I don't know the full name. How do I use the wildcard function??

- | | |
|------------------|---|
| General% | (Displays all titles with “General” as the <u>first</u> word) |
| %General | (Displays all titles with “General” as the <u>last</u> word) |
| %General% | (Displays all titles with “General” anywhere in the title) |