



Banner Finance

Research Accounting

Training

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Logging in to Banner:

- Open Internet Explorer
- web address for Banner access (<https://banner-dev.msm.edu:8500/>)
- Choose the Instance/Format you need
 - (for tfU]b]b[sessiong- **Internet Native Banner**', ('PREPROD')
- Click to open
- Enter Username / Password / Database
- Username
- Password
- Database = N/A
- .
-

Assigning Proposal Numbers:

Format: Nine digits - 000000000

Proposals will be sequentially numbered starting with 000000001

Perform a search to find the next available number.

To search for next available number:

- Go to FRAPROP
- Double click on down arrow (search) - Proposal Code
- Click on list of proposal codes (FRIPROP)
- In the proposal field, type %0%
- Click on execute query
- Scroll to end of proposals to see the last number used

Setting up a Proposal

Main Tab:

Step	Action
1	Access the Proposal Maintenance Form (FRAPROP).
2	Enter a new or existing proposal code in the Proposal Code field using the format provided above.
3	Perform a Next Block function. Note: To create a new proposal from an existing proposal use the Copy Proposal Information function under the Options menu
4	Enter the chart of accounts code (the default value comes from the User Profile Record) in the Chart of Accounts field. This will be '1' for all MSM Proposals.
5	Enter the responsible organizational code of the responsible administrative office for this proposal in the Responsible Organization field. (see Appendix for list)
6	Enter the title of the proposal (up to 256 characters) in the Long Title field. Note: The first 35 characters will display in the Title field. You can edit the Title field if desired.
7	Enter the sponsor agency identification code in the Agency field. DO NOT USE
8	Enter a principal investigator ID in the Principal Investigator ID field. Note: If you enter a Principal Investigator ID here, the ID and name will display on the Personnel Information window with an Indicator of 001, and is always hard-coded as the primary person responsible.
9	Enter the original preparation date in the Original Date field. This is a required field. Notes: This date is intended to be the preparer's date and does not change over the life of the proposal. The current date is displayed, but can be overridden with a prior or future date. This date can be used in ad hoc reporting to track the elapsed time between the Proposal Preparation date and the Grant date. Once the proposal is saved, this date cannot be updated. This date is different from the Project Period Start date, Project Period End date, Expected Grant date, Proposal Due date, and Activity date. It is intended to provide the ability to track proposal to grant or proposal to submission time frames.

Step	Action
10	Enter the date the proposal is due in the Due Date field.
11	Enter the date the request was/will be submitted in the Submit Date field.
12	Enter the code that represents the status of the proposal in the Status Code field. Note: If a Status Code is entered, a date must be entered in the Status Date field.
13	Enter the proposed start date of the grant in the Project Start Date field.
14	Enter the expected end date of the project in the Project End Date field.
15	_____
16	Enter the proposed start date of the budget period in the Budget Start Date field.
17	Enter the proposed end date of the budget period in the Budget End Date field.
18	Enter the date by which you expect a decision regarding the proposal from the sponsor in the Expected Date field. Note: This date must be later than the due date.
19	Enter the code of the original proposal from which the current proposal was copied in the Related Proposal field.
20	Enter the estimated probability of receiving funds for this proposal as a percentage in the Probability Rate field.
21	Enter the code to indicate the type of proposal in the Proposal Type field. See Appendix for list of options
22	Enter the category code of the sponsored program to which the proposal belongs in the Category field. See Appendix for list of options
23	Enter the code to identify the sub-category within a proposal in the Sub Category field. See Appendix for list of options
24	Select the Catalog of Federal Domestic Assistance reference number in the CFDA field. If the CFDA number is not available, contact Grant Accounting so that it can be added.
25	Enter the reference number of the sponsoring agency in the Sponsor ID field. This would be the Contract Number or Agreement Number, etc. Note: This value is used for ad hoc reports and bills.
26	Click the Save icon.

Proposal Agency Tab: 8c 'bchi gY

Proposal Maintenance FRAPROP 7.0 (C700)

Proposal Code: Text Exists:

Main Proposal Agency Location Cost Code Personnel User Defined Data

Agency:

Contact:

Predecessor:

Address Type:

Sequence Number:

Phone Number Exists:

Phone Type: Number: Extension:

Procedure

Follow these steps to complete the process.

Step	Action
1	Select the Proposal Agency tab.
2	Enter the contact person's name in the Contact field.
3	Verify or select address information if needed. If address is not available submit 'Request to Add Agency' to Office of Research.
4	Click the Save icon.

Cost Code tab

Oracle Developer Forms Runtime - Web: Open - FRAPROP

File Edit Options Block Item Record Query Tools Help

Proposal Maintenance FRAPROP 7.2 (TEST)

Proposal Code: 0607E0069 Text Exists: N

Main Proposal Agency Location **Cost Code** Personnel User Defined Data

Chart of Accounts: [i] [v]

Indirect Cost Basis: SW [v] All Salaries and Wages

Indirect Cost Rate Code: SW49 [v] 49 Percent of Salaries and Wages

Indirect Cost Charge Account Code: TTU [v] All Indirect Cost Charges

Indirect Cost Distribute To Code: OME [v] Mechanical Engineering Other Privat

Cost Share Basis: 250965 [v] Cost Share for 250965

Cost Share Rate Code: BASE [v] Base Percentage 10 Percent

Cost Share Credit Account Code: TTU [v] Base Cost Share Credit Account Code

Cost Share Distribute From Code: 250965 [v] Power Ctr Cost Share for 250965

Fringe Rate:

Procedure

Follow these steps to complete the process.

Step	Action
1	Select the Cost Code tab.
2	Enter the Chart of Accounts in the Chart of Accounts field, as well as the appropriate codes for automatic Indirect Cost and Cost Share calculations.
3	Click the Save icon.
4.	Do not input anything into Cost Share at this time.
5.	If you do not see the correct F&A Rate, notify grants and contracts.

Personnel tab

Proposal Maintenance FRAPROP 7.0 (C700)

Proposal Code: Text Exists:

ID:
 Indicator:
 Chart of Accounts:
 Organization:
 Salutation:
 Title:
 Full Time Equivalency: Employee:

ID:
 Indicator:
 Chart of Accounts:
 Organization:
 Salutation:
 Title:
 Full Time Equivalency: Employee:

Procedure

Follow these steps to complete the process.

Step	Action
1	Select the Personnel tab.
2	Select an ID of the person you want to add to the proposal in the ID field.
3	Select an indicator code in the Indicator field. See Appendix for list of codes. Warning: You can only have one primary investigator / You MUST have a primary investigator
4	Click the Save icon.

USER-DEFINED DATA

The user-defined data tab will house all of the program/activity codes for each proposal. To enter a new program/activity code, follow the steps below:

- Go to the BANNER General Menu screen
- Type in FRVSDAT, hit enter, this will take you to the validation table
- Under Literal column, enter Program Type
- Under Value, enter the actual program/activity code (R01, S21, U01, etc.)
- Under Title, enter the program/activity code description. You can find this on the program announcement.
- Short Title – Do not enter anything in this field.
- Data – Do not enter anything in this field.
- Click on the save icon
- Close screen

Setting up a Proposed Budget

The screenshot shows the Oracle Developer Forms Runtime interface for the FRABUDP form. The title bar indicates 'Oracle Developer Forms Runtime - Web: Open > FRAPROP - FRABUDP'. The menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, and Help. The toolbar contains various navigation and editing icons. The main form area is titled 'Proposal Budget: FRABUDP 7.0 (TEST)'. The form fields are as follows:

- Proposal:** 0405M0115 (dropdown), TJT Battery Research (text field)
- Budget Code:** AMEND 1 (dropdown)
- Budget Description:** Amendment 1 to Contract (text field)
- Chart of Accounts:** T (dropdown), Select Budgets
- Budget Begin Date:** 01-APR-2007 (calendar icon)
- End Date:** 31-JUL-2007 (calendar icon)
- Duration:** 4 (text field)
- Submission Date:** (empty text field)
- Year:** (checkbox)
- Type:** W (dropdown)
- Indirect Cost Basis Code:** SW (dropdown)
- Indirect Cost Rate Code:** SW49 (dropdown)
- Cost Share Basis Code:** (empty dropdown)
- Cost Share Rate Code:** (empty dropdown)
- Fringe Rate:** .000 (text field)
- Total Requested Amount:** 20,000 (text field)

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Proposal Budget Form (FRABUDP).
	Note: This form consists of two windows. The main window allows you to define the proposal budget elements that define the nature of the budget. The second window (Proposal Budget Detail window) allows you to enter multiple budget line items, and perform auto calculations of Indirect Cost, Cost Sharing, Waived Indirect, and Fringe.
2	Enter a proposal code in the Proposal field. This would be the Proposal number that was set up.
	The budget code format 00(Yr), 000 (Org Code)
3	The remainder of the format can be used to denote Supplement (S), and year when applicable
4	Perform a Next Block function.
	Note: If the budget exists, its associated attributes (budget description, COA, Indirect Cost and Cost Sharing Basis Codes, Indirect Cost and Cost Sharing Rate Codes) that were used in developing the budget are displayed.
5	Enter the description for the budget code in the Budget Description field.
6	Enter the Appropriate Chart (most likely '1') in the Chart of Accounts field

Step	Action
7	Click the Select Budgets checkbox to build a new budget from a previously created budget code. Notes: Navigation from this checkbox automatically takes you to the Proposal Budget Selection Form (FRCBSEL). On FRCBSEL, you may select one or more budget codes that have already been created for existing proposals and use them as a basis for creating your new budget. If more than one budget is selected, they are consolidated into one budget by account code or title. You may not use the Select Budgets checkbox feature if you have already created budget line items for this budget code
8	Enter the date the budget period ends in the End Date field.
9	Enter the year to which this budget applies in the Year field.
10	Enter the budget type in the Type field. Note: The Indirect Cost Basis Code, Indirect Cost Rate Code, The Cost Sharing Basis Code, and Cost Sharing Rate Code fields will display the values set on the Proposal Maintenance Form (FRAPROP).
11	Enter the total amount of money requested from the sponsoring agency in the Total Requested Amount field.

Procedure

Follow these steps to complete the process.

Step	Action
1	Perform a Next Block function.
2	Enter the account code in the Account field, or the title of the account code in the Title field.
3	Enter the amount of money requested from a sponsoring agency for the account line item in the Proposed Budget field.
4	Enter the amount of money the organization agreed to contribute toward the account line item in the Cost Sharing field.

Step	Action
5	The Project Value field displays the sum of the proposed budget and the cost share.
6	Select Calculate Information Now from the Options menu to calculate and display the Calculations in their respective budget lines.
7	Click the Save icon.
8	Click the Exit icon.

List of Common Account Codes for Proposals:

Object	Description	Account Code
61001	Faculty Salaries	61001
61031	Executive Salaries	61031
61035	Professional Salaries	61035
61036	Administrative Support Workers	61036
61037	Technical and Paraprofessional Salaries	61037
62040	Employee Benefits (Fringe)	62040
7100	Supplies Pool Account	7100
7200	Travel Pool Account	7200
7700	Capital Purchases Pool Account	7700

Proposal Title Search

Banner will Search the Long title, but the short title will show in the results

The screenshot shows a web browser window titled "Oracle Developer Forms Runtime - Web: Open > FRIKPRO". The browser address bar shows "Proposal Title Search FRIKPRO 7.0 (TEST)". Below the browser window is a search form with a "Search Value:" label and a text input field containing "%Land%".

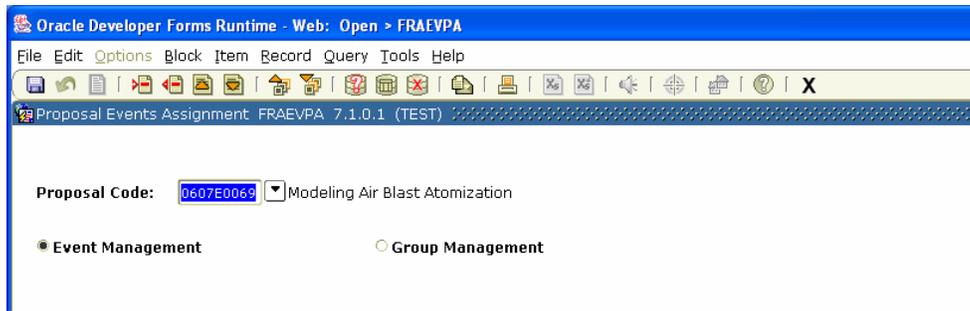
Below the search form is a table with the following columns: Proposal Code, Grant, Status, Title, and Status Date. The table contains four rows of data:

Proposal Code	Grant	Status	Title	Status Date
0506P0030		F	WCS Teaching American History	03-MAY-2007
0506P0147		F	UC Satellite Datasets	04-MAY-2007
0506W0147		F	UC Satellite Datasets	04-MAY-2007
0607W0114		P	Cumberlands Habitat Conservation	01-MAY-2007

At the bottom of the browser window, there is a status bar with the text "Press duplicate item to see Proposals." and "Record: 1/4" on the left, and "1/30" on the right.

Events Associated with Proposals

Setting up An Event



Step	Action
1	Access the Proposal Events Assignment Form (FRAEVPA).
2	Enter your proposal code in the Proposal Code field.
3	Select the Event Management radio button to assign event codes to a proposal code.
4	Perform a Next Block Function
5	Enter the number of days before an event is due in which the user should be notified to satisfy or perform a particular event in the Number of Days Reminder field.
6	Perform a Next Block function, to access the Event Assignment Window.
7	Enter the event in the Event Code field.
8	<p>Enter the number of days before/after the begin/end date that the event is due in the Number of Days field.</p> <p>Notes: This field is used for one-time events. If you enter a value in this field you must select a value for the Begin Date field.</p> <p>You may enter data in the Number of Days and Begin Date fields or the Date From and Date To fields, but not both.</p>
9	<p>Select the date from the pull-down list in the Begin Date field.</p> <p>Note: This field is required if you entered data in the Number of Days field.</p>
10	<p>Enter the date that the first event is due in the Date From field.</p> <p>Note: This field is used for recurring events. If you enter a value here you must also enter a value in the Date To and Frequency fields.</p>

Step	Action
10	Enter the date that the reports are no longer due in the Date To field. Note: This field is used for recurring events. If you enter a value here you must also enter a value in the Date From and Frequency fields.
11	Select how often the event occurs in the Frequency field. Note: This field is required if the Date To and Date From fields have been populated.
12	Enter the user ID of the individual primarily responsible for the satisfaction of this event in the Responsible User ID field.
13	Click the Proxy User ID button to select a secondary person to be responsible for the satisfaction of this event.
14	Click the OK button to return to the Event Assignment Window. Note: Steps 15 – 19 are optional.
15	Highlight a pending event.
16	Click Options and select Text Information this will take you to the Entity Text Form (FOAETXT).
17	Enter the text related to the event code for your proposal. Use the down-arrow key to move to a new line.
18	Click the Print checkbox if you want the selected text to print on a document.
19	Click the Save icon.
20	Click the Exit icon.

Proposal Event Action Form

Oracle Developer Forms Runtime - Web: Open > FRAEVNP

File Edit Options Block Item Record Query Tools Help

Proposal Event Action FRAEVNP 7.0 (TEST)

Proposal Code: 0607E0069 Modeling Air Blast Atomization

Sequence Number	Event	Due Date	Status	Status Date
1	FREPRT Final Project Report This is a demo of a one time report	26-DEC-2006	P	

Status : (S)atisfied, (C)ancelled or (P)ending
Record: 1/1 | ... | <OSC> 1/30

Procedure

Follow these steps to satisfy or cancel an event that has been created or completed.

Step	Action
1	Access the Proposal Event Action Form (FRAEVNP).
2	Enter the proposal code in the Proposal Code field. Note: when viewing this form you will only be able to view event assignments for your logon. Other assignments can not be seen here.
3	Perform a Next Block function.
4	Use the down-arrow key to access the event that you would like to satisfy or cancel.
5	Enter S (Satisfy) or C (Cancel) in the Status field.
6	Click the Save icon. Note: The Approved By and Date fields will be populated.
7	Click the Exit icon.

APPENDIX A

[Organizations Codes/Descriptions](#)

[M Numbers](#)

M:\OSP-Shared files\MSMWEB\BANNER\Pre Award Documents\Organization and PI Codes