

Date: March 16, 2017
To: Banner Finance User Community
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RE: Viewing prior year financial information in Banner Finance

The following outlines the process for looking back at prior year information in Banner Finance.

When the new fiscal year begins on July 1, 2017, you might notice that certain Banner forms automatically default to FY18. To view financial information for the prior year (FY17), select the field for fiscal year (as shown below) and change it from 18 to 17 and then proceed with your query as usual.

If you have any question about viewing prior year financial transactions in Banner, please contact EWU General Accounting at 509-359-2467.

The screenshot shows the 'Executive Summary FGIBDSR 8.5 (PROD)' interface. It features a grid of search criteria on the left and a vertical list of filters on the right. The 'Fiscal Year' field is highlighted in yellow and set to '17'. Other fields include 'Chart' (E), 'Index', 'Commit Type' (Both), and checkboxes for 'Query Specific Account' and 'Include Revenue Accounts'. The right-side filters include Organization, Fund, Program, Account, Account Type, Activity, and Location, all currently empty.

| | | | | | |
|---|------|---|----------------------|--|---|
| Chart: | E | ▼ | Organization: | | ▼ |
| Fiscal Year: | 17 | ▼ | Fund: | | ▼ |
| Index: | | ▼ | Program: | | ▼ |
| <input type="checkbox"/> Query Specific Account | | | Account: | | ▼ |
| <input checked="" type="checkbox"/> Include Revenue Accounts | | | Account Type: | | ▼ |
| Commit Type: | Both | | Activity: | | ▼ |
| | | | Location: | | ▼ |