

## HOW TO RUN A BANNER REPORT USING A WEB BROWSER

### General:

This method can be used if you **do not have Crystal Reports** (or any other reporting tool), but would still like to print or export generic reports using your web browser. We have made the most commonly used reports available on the Web. Keep in mind that you cannot manipulate the report in any way (what you see is what you get). If you need to modify or create your own reports then you will have to get a Crystal Reports license or use your own query tool.

### Check List:

Depending on the report you must have some or all of the following information:

- ❖ Your Banner Userid and Password for the data warehouse  
(typically same as your client password)
- ❖ 2 – digit fiscal year e.g. 01 = 2000/2001
- ❖ 2 – digit period e.g. 07 = December
- ❖ 6 – digit Fund code e.g. 100001
- ❖ 5 – digit Org code e.g. 00411

Type in the following URL: <https://banweb2.is.mcgill.ca/banrep>

The website should look similar to the screen captured here:

So far this site provides 17 different reports. New ones are added all the time. We will use the report **Detail Fund Statement by Account** as an example to show you how to generate reports from the Web.

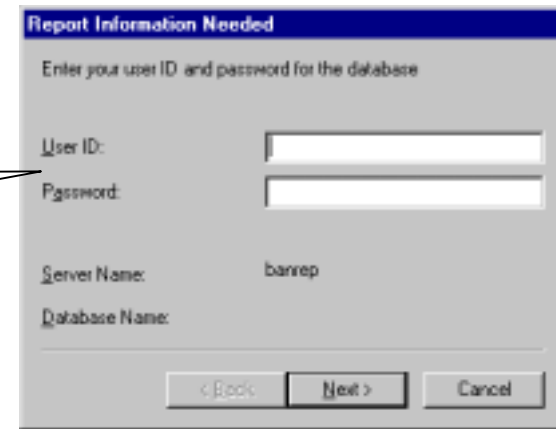
For example:  
Once you are at the website  
click on the link [Detail fund statement by account](#).



## Entering Report Information

### Logging in to the Banner Warehouse:

Enter your Banner Userid and Password in the boxes provided.  
For example:  
**Userid:** jbrown  
**Password:** born2bwild  
Click on the Next button when you are finished.



The screenshot shows a dialog box titled "Report Information Needed" with a blue header bar. The main text says "Enter your user ID and password for the database". There are four input fields: "User ID:" and "Password:" are empty text boxes; "Server Name:" contains the text "banrep"; and "Database Name:" is an empty text box. At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

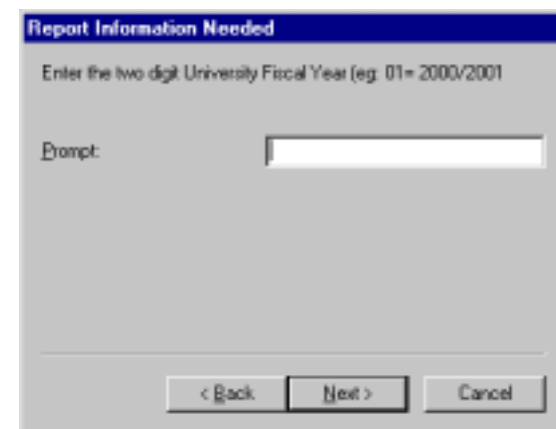
### Logging In:

If the login box reappears after you click on next, then there was a problem with the information you entered. Either your userid or password was entered wrong, or you do not have access to the datawarehouse (server).

If you do not have access to the datawarehouse, fill in the form at <http://www.mcgill.ca/accounting/forms/reqdatawarehouse/>

### Entering report data:

Once you have logged in, you will be prompted for information through a series of dialog boxes. The first one is displayed here. Simply enter the information you would like to query on in the box provided and click on the **Next** button at the bottom of the box. Continue like this till you get to the end and select the **Finish** button.



The screenshot shows a dialog box titled "Report Information Needed" with a blue header bar. The main text says "Enter the two digit University Fiscal Year (eg. 01= 2000/2001)". There is one input field labeled "Prompt:" which is empty. At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

## Report Results:

A report similar to the one captured here should appear on your screen.

**Note:** If you would like to print the report click on the printer icon on the report toolbar rather than the one on your web browser.

If you would like to run the same report but with different criteria, click on the **Refresh** button (lightning bolt). Follow the same procedures described above.

Export the report to file by clicking on the envelope button.

Navigate through the pages of your report by clicking on the arrow buttons.

The screenshot shows a web browser window titled 'Crystal Report Viewer - Microsoft Internet'. The address bar displays 'https://banweb2.is.mcgill.ca/banner/fund\_statement\_by\_account.rpt'. The report content is titled 'McGill University' and 'Detail Fund Statement by Account'. It specifies 'For the University Fiscal year: 2000/2001' and 'For the University Fiscal Period: December'. The report is organized into sections: 'Fund' (900048 Banner Office/Infrastructure), 'Organization' (00411 Banner Information Systems Project), 'Date' (1 of 1+), 'Description' (Telephone Equipment/Services), 'Document Code' (000000), 'Role Class/Description' (Unassigned Activity), 'Accounted Budget' (000000), and 'YTD Actuals' (000000). The report is displayed in a preview window with a toolbar containing buttons for Back, Forward, Stop, Print, Refresh, and Export.