

Banner 8 Upgrade Documentation: Generating a Vendor Record

The implementation of Banner 8 and the new enhancements will allow MSU to remove the SSN/TIN as the alternate ID for Banner records. This will change the procedure for generating IDs and finding records in the database

The Banner 8 search enhancement will allow you to retrieve a record using an SSN/TIN if it is known and it is in the database only if you are using FOAIDEN to retrieve or create the record. When you type the SSN/TIN in the ID field, Banner searches the SPAPERS form, or BIO tab, for the SSN/TIN. If the SSN/TIN is in the database, the record auto-populates as it did in Banner 7.

The Banner 8 search enhancement no longer allows you to retrieve a record using an SSN/TIN in the ID Field of FTMVEND/FTMAGCY where MSU has historically stored vendor records. These forms are not the SunGardHE recommended starting point and do not provide the standard SSN/TIN search feature. With the SSN/TIN no longer available as the alternate ID, users cannot search for vendor records in these forms as they did previously. Only the FOAIDEN form can populate records using the SSN/TIN when it is known and in the database.

Use the procedures detailed on the following pages to populate or generate vendor records, according to whether you do or do not know the SSN/TIN.

To retrieve a record when the SSN/TIN is available

1. Enter the SSN/TIN in FOAIDEN to populate the form with the vendor record, as in Banner 7.

Oracle Developer Forms Runtime - Web: Open > FOAIDEN

File Edit Options Block Item Record Query Tools Help

Person Identification Form - Finance FOAIDEN 8.3 (PG8:6/27) (BZ)

ID: ADVANA Advanced Analytical Associates Generate ID:

Current Identification Alternate Identification Address Telephone Biographical E-mail Emergency Contact Additional Identification

ID: ADVANA Name Type: SSN/SIN/TIN: 810530599

Person

Last Name:

First Name:

Middle Name:

Prefix:

Suffix:

Preferred First Name:

Full Legal Name:

Marital Status:

Non-Person

Name: Advanced Analytical Associates

ID and Name Source

Last Update

User: DFELKEY

Activity Date: 21-DEC-1999

Origin: FOAIDEN

Original Creation

User:

Create Date:

Current identification number, overwrite to change.
Record: 1/1 <OSC>

2. Enter FTMVEND or FTMAGCY in the Go To field to finish your data entry as usual.

To search for a vendor record when the SSN/TIN is not known

1. Select the new alternate ID search form, GUIALTI, from FOAIDEN. This form is in the option list of choices when you click the icon to the right of the ID field.

2. The alternate ID search form GUIALTI allows you to search for SSNs as in Banner 7.
3. When you locate the SSN/TIN, select the record to auto-populate the IDEN form.
4. Here % Pizza % is searched.

SSN/SIN/TIN	ID	Entity	Last Name	First Name	Middle Name	Birthdate	Change
3BRO	C	3 Brothers Pizza & Java Co					
AMEPIZ	C	American Pizza Partners LP					
BOBPIZ	C	Bobs Pizza Plus of Helena Inc					
BOZDOM	C	Bozeman Dominos Pizza					
BRIVAL	C	Bridger Valley Pizza Inc					
BUFBUM	C	Buffalo Bump Pizza					
CANDEL	C	Canyon Deli and Pizza Shoppe					
COLPIZ	C	Colombo's Pizza & Pasta					
COSPIZ	C	Cosmic Pizza					
CRZBEA	C	Crzy Bear Pizza					
DELBIG	C	Delauters Big Cheese Pizza					
DOMPIZ	C	Dominos Pizza					
DORREB	C	Dorden & Rebo Pizza Inc					
EUGPIZ	C	Eugene's Pizza					
FREPIZ	C	Freemo's Pizza					
GATPIZ	C	Gatto's Pizza Restaurant					
GODPIZ	C	Godfathers Pizza					
GUSPIZ	C	Gusher Pizza and Sandwich Shoppe					
HITPOS	C	Hitching Post Pizza					
HOWPIZ	C	Howards Pizza					
KRAPIZ	C	Kraft Pizza Company					
LITBIG003	C	Little Big Men Pizza					

5. After populating the record in FOAIDEN, use the F5 function to bring up a Go To field.
6. Enter FTMVEND or FTMAGCY to go to those forms.

Oracle Developer Forms Runtime - Web: Open > FOAIDEN

File Edit Options Block Item Record Query Tools Help

Person Identification Form - Finance FOAIDEN 8.0 (PG8TST) (BZ)

Go To...: FTMVEND My Institution: <http://www.sungardscet.com> powered by SUNGARD HIGHER EDUCATION

ID: AMEPIZ American Pizza Partners LP Generate ID: [icon]

Current Identification Alternate Identification Address Telephone Biographical E-mail Emergency Contact Additional Identification

ID: [] Name Type: [] SSN/SIN/TIN: []

Person

Last Name: []
 First Name: []
 Middle Name: []
 Prefix: []
 Suffix: []
 Preferred First Name: []
 Full Legal Name: []
 Marital Status: []

Non-Person

Name: []

ID and Name Source

Last Update

User: []
 Activity Date: []
 Origin: []

Original Creation

User: []
 Create Date: []

Enter the object name; Press LIST for listing.
 Record: 1/1 <OSC>

- The GUITINH form will give you the SSN/TIN history, including changes made to the number and by whom. Use CTRL-PGDN to view the information.

The screenshot shows the GUITINH form with the following data:

ID	Entity	Name	Current SSN/SIN/TIN	Birth Date
AMEPIZ	C	American Pizza Partners LP	481028329	

SSN/SIN/TIN Changed From	SSN/SIN/TIN Changed To	Changed By	Date Changed	Time Changed

To create a new vendor with no knowledge of the SSN/TIN

- If you cannot find the vendor in GUIALTI and need to create a new record, begin by searching the usual non-person search forms, FTIIDEN or FOICOMP.
- If you create your vendor in FOAIDEN you can enter the ID as usual, CTRL-PGDN and enter the name.

The screenshot shows the FOAIDEN form with the following data:

ID: AMEPIZ Name Type: SSN/SIN/TIN: 481028329

Person

Last Name: First Name: Middle Name: Prefix: Suffix: Preferred First Name: Full Legal Name: Marital Status:

Non-Person

Name: American Pizza Partners LP

ID and Name Source

Last Update

User: DFELKEY Activity Date: 09-FEB-2007 Origin: FOAIDEN

Original Creation

User: Create Date:

3. Use F5 and Go To FTMVEND/FTMAGCY.

Oracle Developer Forms Runtime - Web: Open > FOAIDEN
File Edit Options Block Item Record Query Tools Help
Person Identification Form - Finance FOAIDEN 8.0 (PG8T0306) (BZ)
Go To... FTMVEND My Institution: http://www.sungardscot.com
ID: DEBFEL Deb Felkey Inc Generate ID:
Current Identification Alternate Identification Address Telephone Biographical E-mail Emergency Contact Additional Identification
ID: Name Type: SSN/SIN/TIN:
Person
Last Name: First Name: Middle Name: Prefix: Suffix: Preferred First Name: Full Legal Name: Marital Status:
Non-Person
Name:
ID and Name Source
Last Update
User: Activity Date: Origin:
Original Creation
User: Create Date:
Enter the object name, Press LIST for listing.
Record: 1/1

4. Press CTRL-PGDN:

Oracle Developer Forms Runtime - Web: Open > FTMVEND
File Edit Options Block Item Record Query Tools Help
Vendor Maintenance FTMVEND 8.3 (PG8-6/27) (BZ)
Vendor: DEBFEL Corporation: Deb Felkey Inc Generate ID:
Last Name: First Name: Middle Name:
Vendor Maintenance Additional Information Vendor Types Address Taxes Collected
Start Date: 19-OCT-2009 Termination Date: Last Activity Date: 19-OCT-2009
Address Defaults
Procurement Accounts Payable
Type Code: Sequence: Type Code: Sequence:
Contact
Area Code Phone Number Extension
Collects Taxes: Collects No Taxes
Owner ID:
Check Vendor:
Discount Code:
Text Exists: N
Enter Vendor Start Date (DD-MON-YYYY)
Record: 1/1

5. Continue with your vendor creation as usual.

For more information or any clarification please contact GIDCOORD@montana.edu.