Educational & General (E&G) – Banner Finance Quick References

General Information

Self Service User ID and PIN:

- Go to: https://patriotweb.gmu.edu/
- Click on the Login button
- User ID: your email username/NetID
- Password: your email/NetID password
- To change your password or set up a user name and password, select the appropriate link. For further assistance, contact ITU Support at 703-993-8870

e~Print User ID and Password:

- User ID: your email username/NetID
- Password: your email/Net ID password

Requesting Access to Self Service & e~Print:

- Go to: https://patriotweb.gmu.edu/
- Log in to Patriot Web Self Service
- Select the Employee Services menu
- Select the Request Access to Banner Products link for forms/directions

Accessing Self Service and e~Print:

- Use Internet Explorer; the system is web-based and will pull real-time information for Self Service and dated reports from e~Print

Organization #: is a six digit number that is linked to your department and school or division.

Whom to Call for Help

Budget Office:	993-8824
ITU Support Center:	993-8870
Fiscal Services Training Office:	993-2089
Policy and Communication:	993-2620
Finance Administrative Systems Team (FAST):	993-2574
General Accounting:	993-2634
Purchasing & Accounts Payable:	993-2580
Travel Office:	993-2623

Notes:

My Organization #s:

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Self Service:

To access, go to:

- https://patriotweb.gmu.edu
- Select Login to Patriot Web Self Service
- Enter email username/NetID and Password
- Select Financial Information
- Select Budget Queries

Finance Self Service Quick Help	
To find….	*Go to….*
Real-time information on budget, expenses, and balance available	❑ Access Self Service through steps listed above ❑ Select Budget Queries ❑ Select Budget Quick Query ❑ Press the Create Query button ❑ Select Fiscal Year ❑ Enter Chart of Accounts = 1 ❑ Enter Org# ❑ Press the Submit Query button
Real-time details on non-personnel charges (drill-down capability on charges)	❑ Access Self Service through steps listed above ❑ Select Budget Queries ❑ Select Budget Status by Account ❑ Press the Create Query button ❑ Select Adjusted Budget ❑ Select Year to Date ❑ Select Encumbrances ❑ Select Available Balance ❑ Press the Continue button ❑ Select Fiscal Year ❑ Select Chart of Accounts = 1 ❑ Select Fiscal Period = 14 ❑ Enter Org # ❑ Press Submit Query button ❑ You may drill-down on specific charges to see details

Please Note: Select "Include Revenue Accounts" only when your organization collects revenue.

e~Print:

To access, go to:

- https://patriotweb.gmu.edu
- Select Management Reports (e~Print)
- Enter email username/NetID and Password
- Select Repository (Fiscal Year)
- Select Report (see chart below for help in determining which report to use)

Finance e~Print Quick Help	
To find….	*Go to….*

Budget, current month expenses, year to date expenses, commitments, and balance available as of month end	❑ Access e~Print through steps listed above
	❑ For the most recent report: press the PDF button next to the Budget Status
	❑ For historical reports: press the Drill button
	  ❑ Press the magnifying glass button
	  ❑ Enter Page Key = Org
	  ❑ Enter Search = your org #
	  ❑ Press the Go button
	  ❑ Press the PDF button

All personnel charges to your organization as of the most recent pay period	❑ Access e~Print through steps listed above
	❑ For the most recent report: press the PDF button next to the Labor Distribution Report
	❑ For historical reports: press the Drill button
	  ❑ Press the magnifying glass button
	  ❑ Enter Page Key = Org #
	  ❑ Enter Search = your org #
	  ❑ Press the Go button
	  ❑ Press the PDF button

Detail list of charges to your organization by month	❑ Access e~Print through steps listed above
	❑ For the most recent report, press the PDF button next to the Organization Detail Activity Report
	❑ For historical reports: press the Drill button
	  ❑ Press the magnifying glass button
	  ❑ Enter Search = your org #
	  ❑ Press the Go button
	  ❑ Press the PDF button

Please Note: Always select the PDF option for viewing e~Print reports.