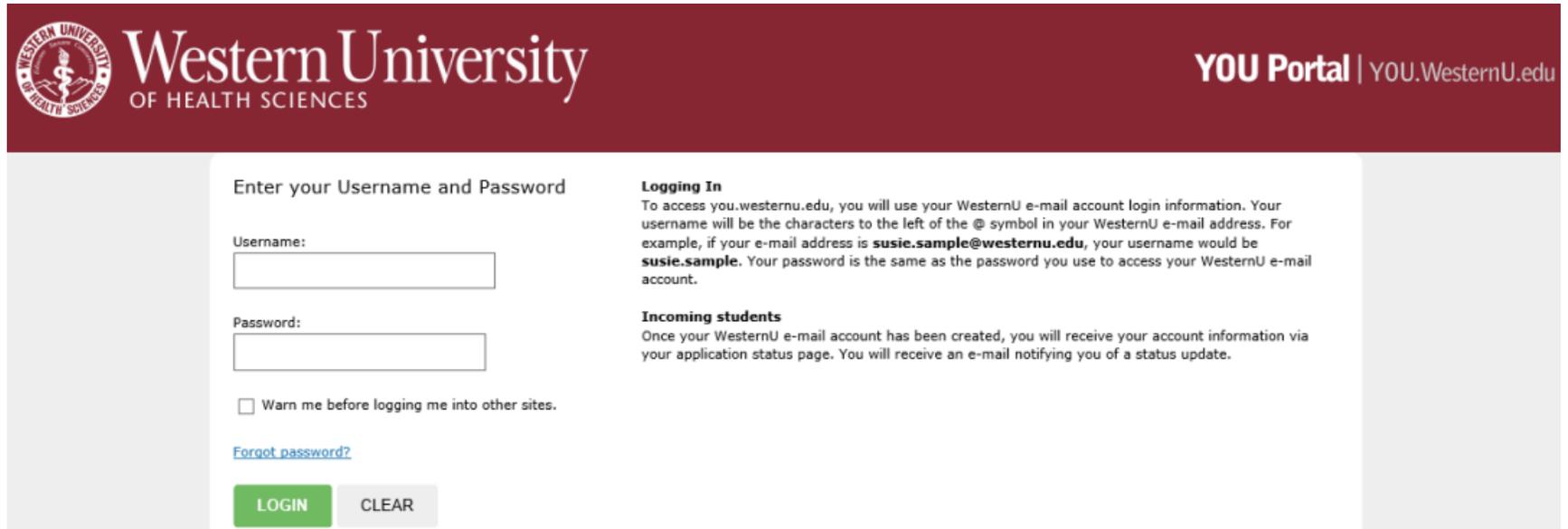


## How to Access Club/Class Account through the YouPortal or on Banweb

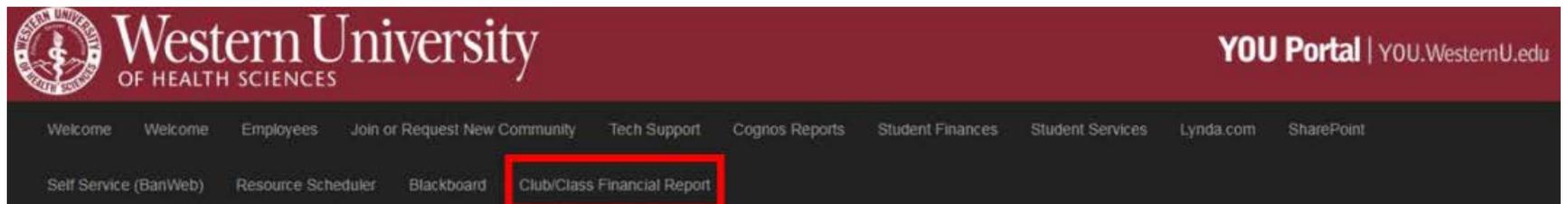
### YouPortal

#### 1) Login to YouPortal



The screenshot shows the login page for the Western University YouPortal. The header features the Western University of Health Sciences logo and the text "YOU Portal | YOU.WesternU.edu". The main content area is titled "Enter your Username and Password" and includes two input fields for "Username:" and "Password:". Below the fields is a checkbox labeled "Warn me before logging me into other sites." and a link for "Forgot password?". At the bottom of the form are two buttons: "LOGIN" (green) and "CLEAR" (grey). To the right of the form, there are two sections: "Logging In" which explains that the username is the part of the email address before the @ symbol, and "Incoming students" which states that account information will be sent via email upon application.

#### 2) Once YouPortal opens, click on "Club/Class Financial Report" in the header



3) Select appropriate Fiscal Year from dropdown (ex: FY 19 = July 1, 2018 – June 30, 2019, etc.)

The screenshot shows the Western University Self-Service portal. At the top left is the Western University of Health Sciences logo. The main header reads "Western University Self-Service OF HEALTH SCIENCES". Below this is a navigation bar with links: Employee Services, Financial Services, Housing Menu, Main Menu, Personal Information, and Reports Menu. An "EXIT" link is located on the right side of the navigation bar. The main content area is titled "Club/Class Financial Report". Below the title, there is a "Fiscal Year:" label and a dropdown menu currently displaying "19". A "Submit" button is positioned to the left of the dropdown menu. At the bottom of the page, there is a footer containing a list of links: [ Approve Documents | Budget Development Menu | Budget Queries | Budget Transfer | Club Financial Report | Delete Finance Template | Encumbrance Query | Finance Related Documents | Finance Security Profile Report | Multiple Line Budget Transfer | Request Report | View Documents | Vendor Invoice Query | Vendor Address Report ]. The text "RELEASE: 1.0" is located in the bottom left corner of the footer area.

4) View Club/Class Financial Report (download reports, view recent transactions/current balance)

The screenshot shows the Western University Self-Service interface. At the top, there is a dark red header with the Western University of Health Sciences logo and the text "Western University Self-Service OF HEALTH SCIENCES". Below this is a navigation menu with items: "Employee Services", "Financial Services", "Housing Menu", "Main Menu", "Personal Information", and "Reports Menu". An "EXIT" link is visible in the top right corner. The main heading is "Club/Class Financial Report".

Below the heading, the following information is displayed:

- Fiscal Year: 19
- Period: 14
- As of: 11/29/2018 10:25:55 AM

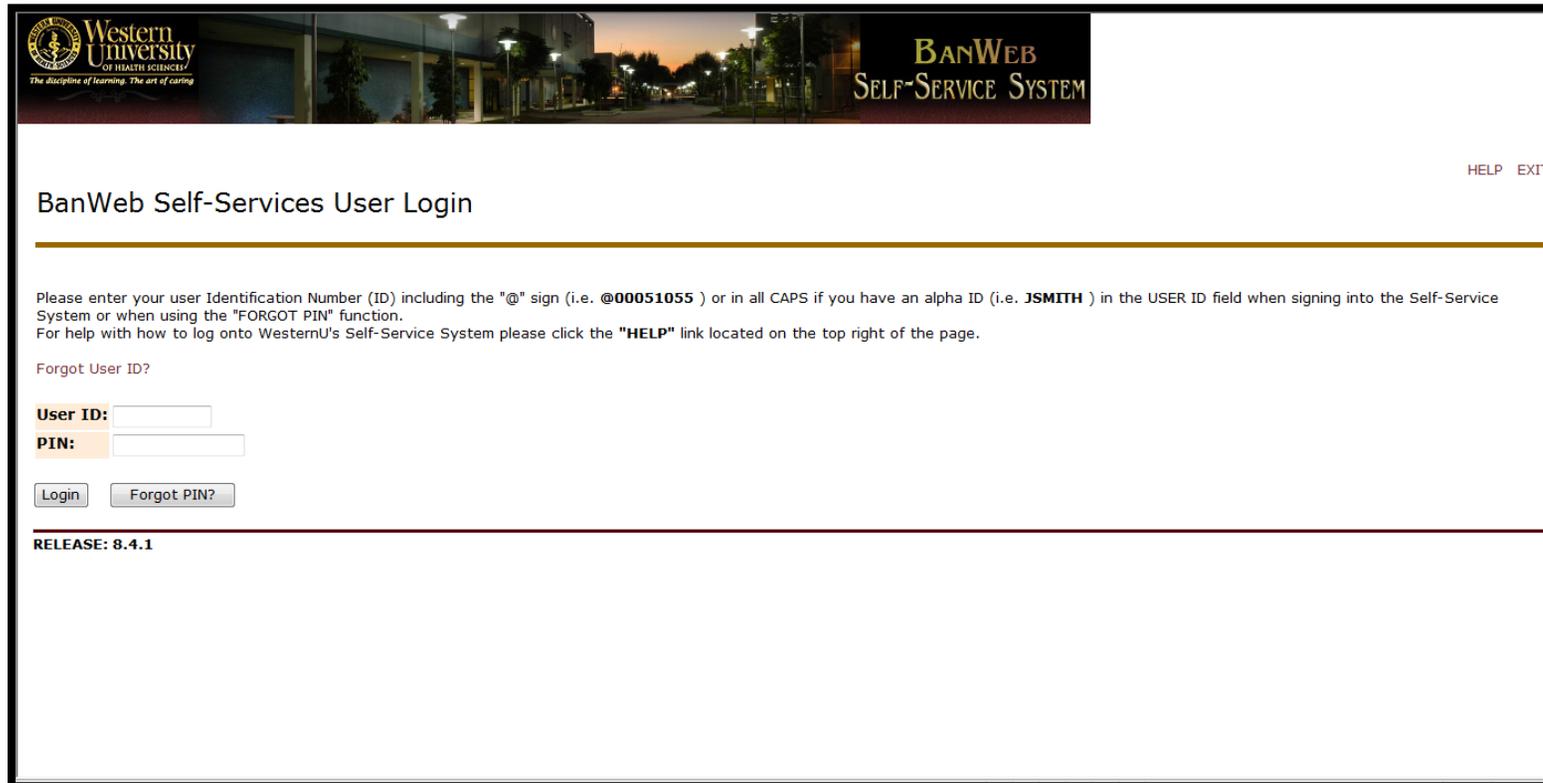
A button labeled "Download Clubs Summary" is present.

The main content area features a table with a dark red header row. The header row contains the text "FUND - Club Name" on the left, a tooltip that says "Click Account to Expand Details" in the center, and two buttons labeled "Download" and "Detail" on the right.

FUND - Club Name	Click Account to Expand Details	Download	Detail
70850 - Miscellaneous			Year-To-Date
70899 - Clearing			Year-To-Date
Available Balance			

## BanWeb

### 1) Log into BanWeb



The screenshot shows the login interface for the BanWeb Self-Service System. At the top left is the Western University of Health Sciences logo with the tagline "The discipline of learning. The art of caring." To the right is a banner image of a building at night with the text "BANWEB SELF-SERVICE SYSTEM". In the top right corner, there are links for "HELP" and "EXIT". The main heading is "BanWeb Self-Services User Login". Below this is a horizontal line. The instructions state: "Please enter your user Identification Number (ID) including the "@" sign (i.e. @00051055 ) or in all CAPS if you have an alpha ID (i.e. JSMITH ) in the USER ID field when signing into the Self-Service System or when using the "FORGOT PIN" function. For help with how to log onto WesternU's Self-Service System please click the "HELP" link located on the top right of the page." Below the instructions is a link for "Forgot User ID?". The login form consists of two input fields: "User ID:" and "PIN:". Below these fields are two buttons: "Login" and "Forgot PIN?". At the bottom left, the release version is listed as "RELEASE: 8.4.1".

Western University  
OF HEALTH SCIENCES  
*The discipline of learning. The art of caring.*

BANWEB  
SELF-SERVICE SYSTEM

HELP EXIT

### BanWeb Self-Services User Login

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Please enter your user Identification Number (ID) including the "@" sign (i.e. @00051055 ) or in all CAPS if you have an alpha ID (i.e. JSMITH ) in the USER ID field when signing into the Self-Service System or when using the "FORGOT PIN" function.  
For help with how to log onto WesternU's Self-Service System please click the "HELP" link located on the top right of the page.

[Forgot User ID?](#)

**User ID:**

**PIN:**

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RELEASE: 8.4.1

2) Once Main Self-Services Menu opens, click on Financial Services Menu

**Employee Services** **Financial Services** **Housing Menu** **Main Menu** **Personal Information** **Reports Menu**

Search   Back SITE MAP HELP EXIT

## Main Self-Services Menu

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**Welcome, Blessing C. Nnoruka, to the WesternU Banweb Self-Services System.** Last web access on Apr 01, 2013 at 11:14 am

**LINKS:**  
[Banner Intranet Site](#) | [Banner Live 8](#) | [Blackboard Portal](#) | [Lebanon Campus Classifieds Ads](#) | [Pomona Campus Classifieds Ads](#) | [WU Computing Resources](#) | [WU Website](#)

- ◆ **EMPLOYEE SERVICES MENU**  
Benefits & Deductions Information | Time record entry form | Vacation, Sick, and Leave time off Current Balances & History | Policies & Procedures | Rotations Contact Information
- ◆ **FEDERAL WORK STUDY POSITIONS**  
Use to search for open Federal Work Study Positions
- ◆ **FINANCIAL SERVICES MENU** ←  
Create Requisitions, Purchase Orders & Budget Transfers | Approve Financial Documents | Query Budget & Encumbrance data | View financial document details or their approval history
- ◆ **HOUSING MENU**  
Available Rentals | List My Property Form | Roommate Request Form
- ◆ **PERSONAL INFORMATION SERVICES MENU**  
View or update your address(es), phone number(s), e-mail address(es), emergency contact information, & marital status | View name change & social security number change information | Change your PIN | Customize your directory profile | Request Parking Pass or Waiver | Edit License Plate Information
- ◆ **REPORTS MENU**  
Advancement Office Reports | CDIHP Reports Menu | Employee Reports | Financial Aid Reports | Human Resources Office Reports | Library Reports Menu | President Reports Menu | Student Reports | University Financial Services & Treasury Reports Menu

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**RELEASE: 8.4**

3) In the Financial Services Menu, click on Budget Queries.

The screenshot shows a web application interface. At the top, there is a dark red navigation bar with several menu items: 'Employee Services', 'Financial Services', 'Housing Menu', 'Main Menu', 'Personal Information', and 'Reports Menu'. Below this bar is a search area with a text input field and a 'Go' button. To the right of the search area are links for 'MENU', 'SITE MAP', 'HELP', and 'EXIT'. The main content area is titled 'Financial Services Menu' and contains a list of menu items, each preceded by a yellow diamond icon. The item 'Budget Queries' is highlighted with a red arrow pointing to it from the right. The other items in the list are: 'Approve Documents', 'Budget Transfer', 'Multiple Line Budget Transfer', 'Encumbrance Query', 'Requisition', 'Finance Related Documents (Replaced View Document)', 'Requisition Report', 'Budget Development Menu', 'View Documents', 'Vendor Invoice Query' (with a sub-item 'Query and view vendor invoices'), 'Vendor Address Report', and 'Delete Finance Template'.

Employee Services Financial Services Housing Menu Main Menu Personal Information Reports Menu

Search  Go MENU SITE MAP HELP EXIT

## Financial Services Menu

- ◆ Approve Documents
- ◆ Budget Queries
- ◆ Budget Transfer
- ◆ Multiple Line Budget Transfer
- ◆ Encumbrance Query
- ◆ Requisition
- ◆ Finance Related Documents (Replaced View Document)
- ◆ Requisition Report
- ◆ Budget Development Menu
- ◆ View Documents
- ◆ Vendor Invoice Query
  - Query and view vendor invoices
- ◆ Vendor Address Report
- ◆ Delete Finance Template

- 4) Once Budget Queries opens, in “Create a New Query” select Budget Status by Account and in “Retrieve Existing Query” select None (it should be set as a default). Click on Create Query to continue to the next screen.

The screenshot shows a web application interface for "Budget Queries". At the top, there is a navigation menu with links for "Employee Services", "Financial Services", "Housing Menu", "Main Menu", "Personal Information", and "Reports Menu". Below the menu is a search bar with a "Go" button and links for "MENU", "SITE MAP", "HELP", and "EXIT". The main heading is "Budget Queries". Below the heading is a horizontal line and a paragraph of instructions: "To create a new query choose a query type and select Create Query. To retrieve an existing query choose a saved query and select Retrieve Query." There are two sections: "Create a New Query" and "Retrieve Existing Query". In the "Create a New Query" section, the "Type" dropdown is set to "Budget Status by Account" and the "Create Query" button is highlighted with a red arrow. In the "Retrieve Existing Query" section, the "Saved Query" dropdown is set to "None" and the "Retrieve Query" button is visible.

Employee Services Financial Services Housing Menu Main Menu Personal Information Reports Menu

Search   MENU SITE MAP HELP EXIT

## Budget Queries

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To create a new query choose a query type and select Create Query. To retrieve an existing query choose a saved query and select Retrieve Query.

**Create a New Query**

Type

**Retrieve Existing Query**

Saved Query

5) Check mark the following boxes in Budget Queries as shown below. It will then be set as a default. Click "Continue"

## Budget Queries

Select the Operating Ledger Data columns to display on the report.

<input type="checkbox"/> Adopted Budget	<input checked="" type="checkbox"/> Year to Date
<input type="checkbox"/> Budget Adjustment	<input type="checkbox"/> Encumbrances (PO)
<input type="checkbox"/> Adjusted Budget	<input type="checkbox"/> Reservations (Req)
<input type="checkbox"/> Temporary Budget	<input type="checkbox"/> Commitments(Both)
<input type="checkbox"/> Accounted Budget	<input checked="" type="checkbox"/> Available Balance

Save Query as:

Shared

[ [Approve Documents](#) | [Budget Queries](#) | [Budget Transfer](#) | [Multiple Line Budget Transfer](#) | [Enc](#)  
| [Budget Development Menu](#) | [View Documents](#) | [Vendor Invoice Query](#) | [Vendor Addre](#)

**RELEASE: 8.7.0.2**

- 6) Fill in the following information as shown below and check mark Include Revenue Accounts. You will only have to insert the information one time; it will then be set as a default. Enter Club fund number to view account information. If for some reason you click on the back arrow to look up a new account always make sure to clear the "Account" information because it will only show clearing expenses. Click on Submit Query to continue to the next screen.

### Budget Queries

For a Budget Query to be successful, a user with Fund Organization query access must enter a value in either the Organization or Grant fields as well as the Fiscal Year, Period, and Chart of Accounts fields. If Grant information is queried, all retrieved information is Grant Inception to Date. Otherwise, all information retrieved is through the Fiscal Year to Date.

To perform a comparison query select a Comparison Fiscal Year and Period in addition to the required Fiscal Year and Period. With this selection, all details retrieved will be placed next to the corresponding comparison fiscal period.

**Change to 2020** → Fiscal year: 2013 ↓ Fiscal period: 14 ↓  
Comparison Fiscal year: None ↓ Comparison Fiscal period: None ↓  
Commitment Type: All ↓

Chart of Accounts	W	Index	
Fund			
Organization	4099	Location	
Grant		Fund Type	
Account		Account Type	
Program			

Include Revenue Accounts

Save Query as:

Shared

Submit Query

**Insert club fund number to look up account information** →

Trusted sites | Protected Mode: Off | 125%

7) A sample of the Query Result list is below. Clearing means money in or deposits. Miscellaneous means money paid out or reimbursements.

**Report Parameters**

**Organization Budget Status Report**

**By Account**

**Period Ending Jun 30, 2013**

**As of Apr 22, 2013**

Chart of Accounts	W Western University of Health Scienc	Commitment Type	All
Fund		Program	All
Organization	4099 Student Accounts	Activity	All
Account	All	Location	All

**Query Results**

Account	Account Title	FY13/PD14 Adopted Budget	FY13/PD14 Budget Adjustment	FY13/PD14 Adjusted Budget	FY13/PD14 Accounted Budget	FY13/PD14 Year to Date	FY13/PD14 Encumbrances (PO)	FY13/PD14 Reservations (Req)	FY13/PD14 Available Balance
70850	Miscellaneous	0.00	0.00	0.00	0.00	1,200.00	0.00	0.00	( 1,200.00)
70899	Clearing	0.00	0.00	0.00	0.00	( 2,371.62)	0.00	0.00	2,371.62
Report Total (of all records)		0.00	0.00	0.00	0.00	1,171.62	0.00	0.00	

**Shared**

This is the account balance

- 8) Select Miscellaneous link in the query result list to retrieve detail information of “Money Paid Out or Reimbursement” to students, vendors or third parties.

**Report Parameters**

**Organization Budget Status Report**

**By Account**

**Period Ending Jun 30, 2013**

**As of Apr 22, 2013**

Chart of Accounts W Western University of Health Scienc Commitment Type All  
Fund - Program All  
Organization 4099 Student Accounts Activity All  
Account All Location All

**Query Results**

Account	Account Title	FY13/PD14 Adopted Budget	FY13/PD14 Budget Adjustment	FY13/PD14 Adjusted Budget	FY13/PD14 Accounted Budget	FY13/PD14 Year to Date	FY13/PD14 Encumbrances (PO)	FY13/PD14 Reservations (Req)	FY13/PD14 Available Balance
70850	Miscellaneous	0.00	0.00	0.00	0.00	1,200.00	0.00	0.00	( 1,200.00)
70899	Clearing	0.00	0.00	0.00	0.00	( 2,371.62)	0.00	0.00	2,371.62
Report Total (of all records)		0.00	0.00	0.00	0.00	1,171.62	0.00	0.00	

**Shared**

**Click here**

9) Sample screen of Miscellaneous and click "Next" for additional list of transactions.

**Report Parameters**

**Organization Budget Status Detail Report**

**Summary Year to Date Transaction Report**

**Period Ending Jun 30, 2013**

**As of Apr 22, 2013**

Chart of Accounts: W Western University of Health Scienc Commitment Type: All

Fund:		Program:	All
Organization:	4099 Student Accounts	Activity:	All
Account:	70850 Miscellaneous	Location:	All

**Document List**

Transaction Date	Activity Date	Document Code	Vendor/Transaction Description	Amount	Rule Class Code
Dec 20, 2012	Jan 14, 2013			1,200.00	JE16
Report Total (of all records):				1,200.00	

Available Budget Balance: ( 1,200.00)

**Shared**

10) Select Clearing link in the query result list to retrieve detail information of “Money Paid In/Deposits” into the account.

**Report Parameters**

**Organization Budget Status Report**

**By Account**

**Period Ending Jun 30, 2013**

**As of Apr 22, 2013**

Chart of Accounts	W Western University of Health Scienc	Commitment Type	All
Fund	-	Program	All
Organization	4099 Student Accounts	Activity	All
Account	All	Location	All

**Query Results**

Account	Account Title	FY13/PD14 Adopted Budget	FY13/PD14 Budget Adjustment	FY13/PD14 Adjusted Budget	FY13/PD14 Accounted Budget	FY13/PD14 Year to Date	FY13/PD14 Encumbrances (PO)	FY13/PD14 Reservations (Req)	FY13/PD14 Available Balance
70850	Miscellaneous	0.00	0.00	0.00	0.00	1,200.00	0.00	0.00	( 1,200.00)
70899	Clearing	0.00	0.00	0.00	0.00	( 2,371.62)	0.00	0.00	2,371.62
Report Total (of all records)		0.00	0.00	0.00	0.00	1,171.62	0.00	0.00	

**Shared**

11) Sample screen of Clearing and click “Next” for additional list of transactions.

**Report Parameters**

<b>Organization Budget Status Detail Report</b>			
<b>Summary Year to Date Transaction Report</b>			
<b>Period Ending Jun 30, 2013</b>			
<b>As of Apr 22, 2013</b>			

Chart of Accounts: W Western University of Health Scienc Commitment Type: All

Fund:		Program:	All
Organization:	4099 Student Accounts	Activity:	All
Account:	70899 Clearing	Location:	All

**Document List**

Transaction Date	Activity Date	Document Code	Vendor/Transaction Description	Amount	Rule Class Code
Mar 13, 2013	Mar 14, 2013			( 110.00)	DCSR
Jan 08, 2013	Jan 17, 2013			( 23.00)	DCSR
Sep 12, 2012	Sep 25, 2012			( 94.83)	DCSR
Sep 12, 2012	Sep 25, 2012			( 150.00)	DCSR
Jul 01, 2012	Jul 23, 2012			( 1,993.79)	JE15
Report Total (of all records):				( 2,371.62)	

Available Budget Balance: 2,371.62

**Key items when viewing your club account:**

**Miscellaneous** – Money paid out or reimbursements

**Clearing** – Money in or deposits paid into the account

**With Parenthesis** – Money in/deposits

**Without Parenthesis** – Money out/reimbursements

If you have any questions please contact Jared Greene in the Office of University Student Affairs at [greenej@westernu.edu](mailto:greenej@westernu.edu) or (909) 469-5340.