



# What you need to know for Banner 9

Human Resources Focus

# Benefits of Banner 9

## **Improved user experience**

- Modern, yet familiar, web user interface with standard controls
- Shorter learning curve for occasional users
- Enhanced usability and navigation for power users
- Ability to run in any modern browser

## **Significant reduction in time & cost to maintain Banner**

- Ellucian Solution Manager
  - Simplifies the upgrade process
  - Minimizes system interruptions and risk
  - Reduces time and cost for installation and deployment
  - Less user testing required
- Modifications replaced with configurations and extensions – eliminates maintenance with upgrades, reduces testing required

# Benefits of Banner 9

## Improved Student and Faculty Experience

- **Student Advising Profile** – saves times for students and advisors, enables personalized advice for better academic decisions
- **Attendance tracking** empowers faculty, saving time for registrars and financial aid
- **Faculty Grade Entry** streamlines grade processing including the ability to enter grades via spreadsheet
- **Registration**
  - More intuitive, saving time for registrar and the IT office
  - Seamless integration with Ellucian DegreeWorks
  - Enables advisors to better plan their student's success
  - Better visibility into course demand for registrars

## Benefits of Banner 9

### **Self Service modules reduce administrative burden**

- **Employee Profile** provides more self-service information for employees saving time for HR
- **Position Description** saves time in creation, editing, routing and approval of positions and makes posting to job search sites faster and more efficient
- **Direct Deposit** for staff and students reduces manual effort for employees, students and internal staff
- **Purchase Requisition** delivers faster procurement of products and services, saving time for the business office
- **My Finance Query** reduces reporting burden, enables better financial management
- **Communication Management** enables simpler and more efficient communications in areas such as financial aid award letters, past-due tuition notices, registration reminders and more

## What's Available In Banner 9

<b>Administrative Applications</b>	<b>Self-Service Applications</b>		
<ul style="list-style-type: none"><li>• Banner General</li><li>• Banner Student</li><li>• Banner Human Resources</li><li>• Banner Finance</li><li>• Banner Financial Aid</li><li>• Banner Student Aid</li><li>• Banner Advancement</li><li>• Banner Accounts Receivable</li></ul>	<b>Student</b> <ul style="list-style-type: none"><li>• Registration</li><li>• Student Advising Profile</li><li>• Attendance Tracking</li><li>• Faculty Grade Entry</li><li>• Class Roster</li></ul>	<b>Finance &amp; HR</b> <ul style="list-style-type: none"><li>• Purchase Requisition</li><li>• Direct Deposit</li><li>• My Finance Query</li><li>• Employee Profile</li><li>• Position Description</li><li>• Effort Reporting</li><li>• Labor Redistribution</li></ul>	<b>General</b> <ul style="list-style-type: none"><li>• Communication Management</li><li>• Personal Information</li></ul>

# The Administrative Staff Experience

## With Banner 9...

Natural user experience

Simplified methods of communication

New capabilities focused on streamlining critical business processes

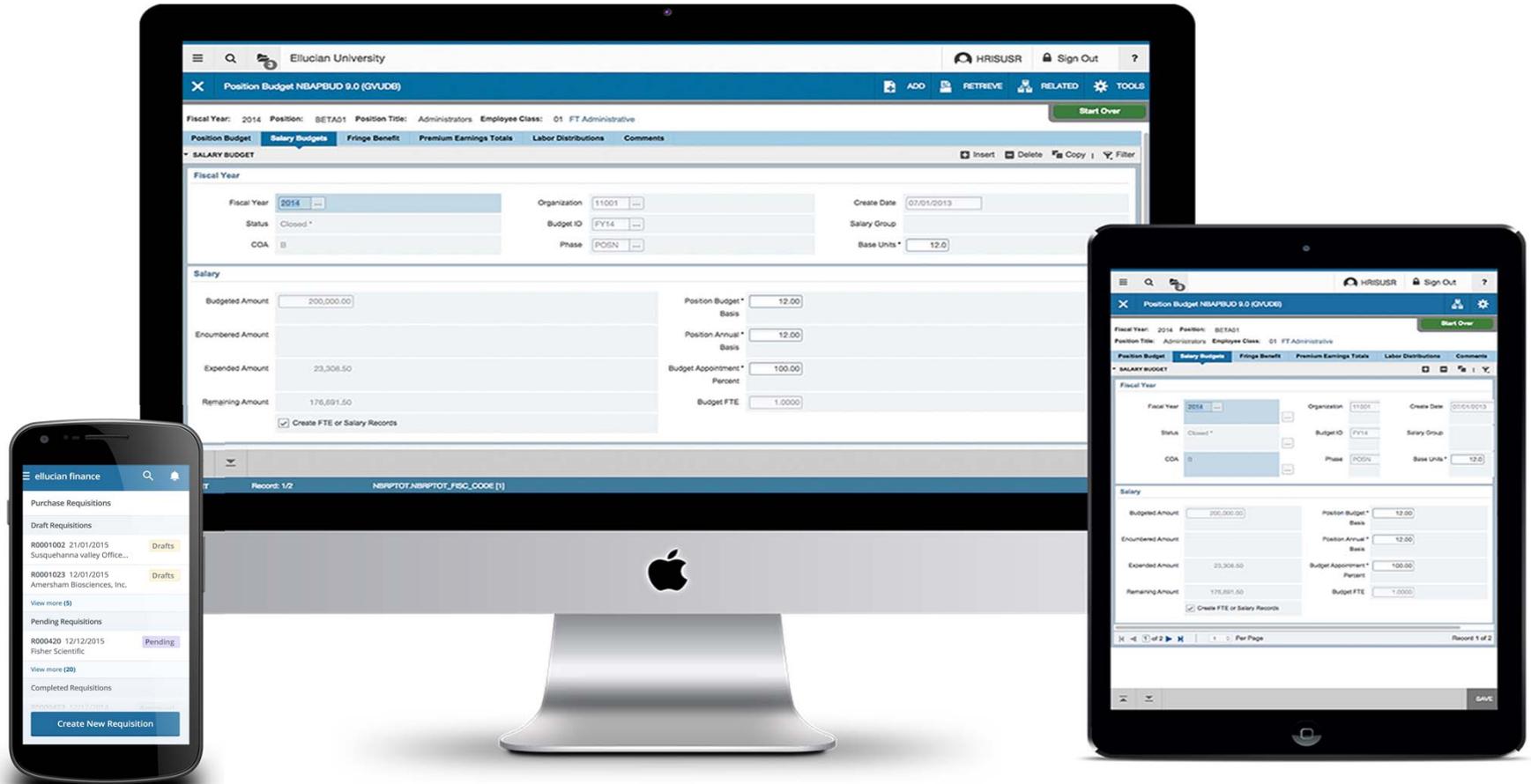
## Impact to Staff

Increased job satisfaction, time savings, and ability to self-serve

Stay better connected across the institution

Drive efficiencies with automation and process re-engineering

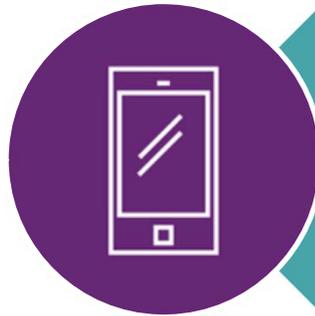
# Banner 9's New Look & Feel



## Tablet Friendly: Banner on-the-go

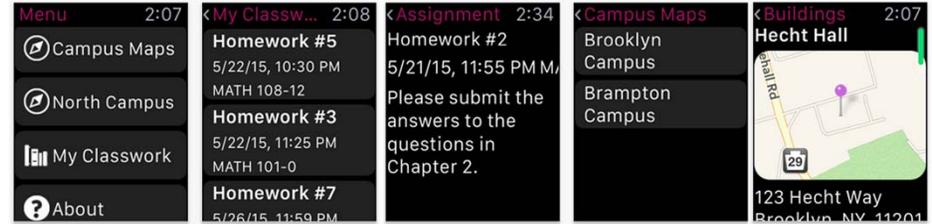


# Supporting Constituents On The Go With All Devices

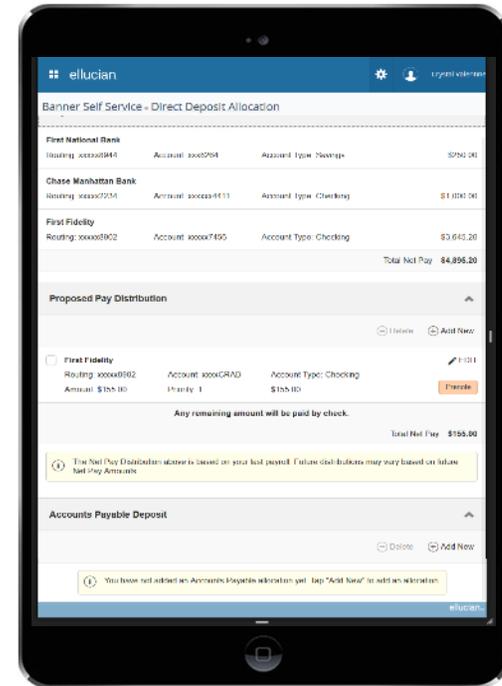


**Ellucian Solutions  
Incorporate Mobility  
and Web 2.0 into  
administrative  
systems  
architecture**

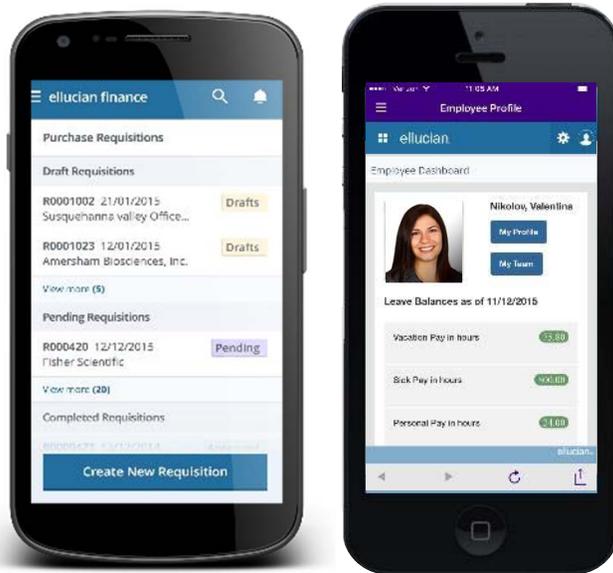
## Watches



## Tablets



## Phones



# Release 9 Administrative Improvements

Old Oracle Forms

New Admin Transformed Page

The screenshot displays the Oracle HR PPAIDEN 9.0 (SMPLP) Person Identification form. The interface is split into two parts: the 'Old Oracle Forms' on the left and the 'New Admin Transformed Page' on the right.

**Old Oracle Forms (Left):** Shows a traditional Oracle Forms layout with a menu bar (File, Edit, Options, E...), a title bar (General Person Identification), and a form with fields for ID (N00012149), Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name, and Full Legal Name. A 'Non-Person' section is also visible below.

**New Admin Transformed Page (Right):** Shows a modernized interface with a top navigation bar (Ellucian University, Sign Out, ?) and a main header (Person Identification - HR PPAIDEN 9.0 (SMPLP)). The form is organized into sections: 'Current Identification' (ID: N00013510, Constance Abate), 'PERSON', and 'NON-PERSON'. The 'PERSON' section includes fields for ID (N00013510), SSN/SIN/TIN, Name Type, Last Name (Abate), First Name (Constance), Middle Name, Prefix, Suffix, Preferred First Name, Full Legal Name, and Marital Status (Single). A 'Start Over' button is present in the top right of the transformed page.

**Bottom Bar:** Displays 'Activity Date 07/16/2008 12:30:12 PM' and 'Activity User CMCCORMI'. A 'SAVE' button is located in the bottom right corner.

# Enhanced User Interface

The screenshot displays the Ellucian University Position Budget interface. At the top, the user is identified as PLEICHLI with a 'Sign Out' option. The main header shows the current record: 'Position Budget NBAPBUD 8:8 (GVUDB)'. Below this, a navigation bar includes 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS' buttons, along with a 'Start Over' button. The main content area is divided into sections for 'Fiscal Year' and 'Salary'. The 'Fiscal Year' section includes fields for Fiscal Year (2014), Organization (11001), Budget ID (FY14), Phase (POSN), Create Date (07/01/2013), Status (Closed), COA (B), Salary Group, and Base Units (12.0). The 'Salary' section displays budgeted, encumbered, expended, and remaining amounts, along with Position Budget, Position Annual, Budget Appointment, and Budget FTE values. A callout box points to the top right area, stating: 'Standard tools and logout information.' Another callout box points to the bottom left navigation area, stating: 'Page navigation, total number of records and table and field information; can be used on tablet or desktop'. The bottom of the screen shows 'Record 1 of 2' and a 'SAVE' button.

Standard tools and logout information.

Page navigation, total number of records and table and field information; can be used on tablet or desktop

# Application Navigation - Release 9 Administrative Improvements

## Personalized Banner Admin Landing Page

The screenshot shows the Banner Admin Landing Page for Ellucian University. The page features a header with a navigation menu, a search bar containing "Ellucian University", and user information for "VNIKOLOV" with a "Sign Out" link. The main content area has a "Welcome" message and a search bar with the placeholder text "Search for forms, pages and menus...". The background is a photograph of a university building. Three callout boxes provide instructions: one for the search bar, one for the background image, and one for the search functionality. The footer contains copyright information, a release version of 1.3.1, and a "Keyboard Shortcuts" link.

Ellucian University

VNIKOLOV Sign Out ?

Welcome

Search for forms, pages and menus...

Search for and open new and legacy Banner forms using normal language or seven character abbreviation.

Add your institution name

Set your own background image

Ellucian® | © 2014-2015 Ellucian Company L.P. and its affiliates. Release: 1.3.1

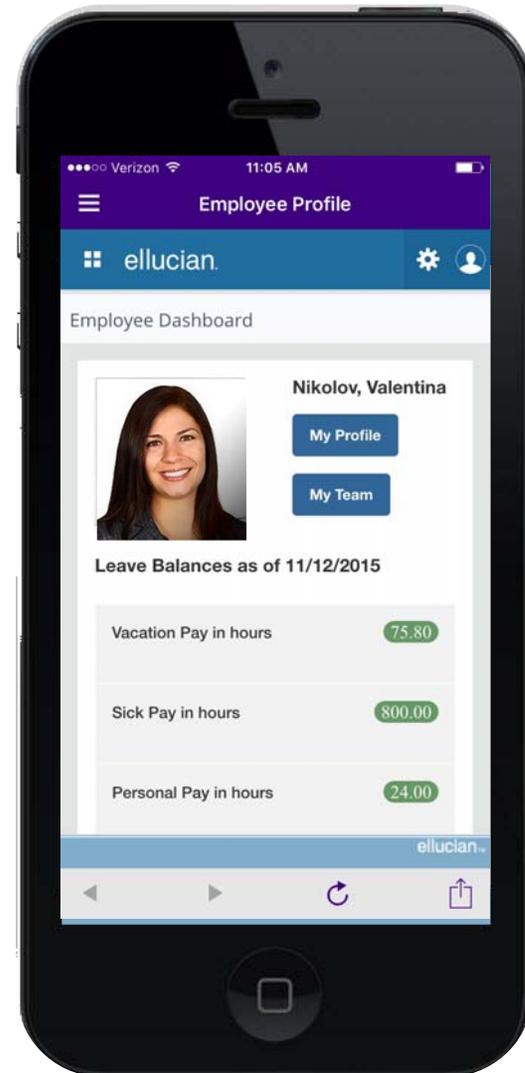
This software contains confidential and proprietary information of Ellucian and its subsidiaries. Use of this software is limited to Ellucian licensees, and is subject to the terms and conditions of one or more written license agreements between Ellucian and the licensee in question.

Keyboard Shortcuts

# Employee Profile

## Employee Profile – Mobile

- Information is condensed and presented in a push instead of pull method
- Supervisor access to team information
- Enhanced usability, tablet and mobile ready



# Employee Profile

ellucian

Valentina Nikolov

Employee Dashboard

## Employee Dashboard



**Nikolov, Valentina**

[My Profile](#)

[My Team](#)

### Leave Balances as of 11/12/2015

Vacation Pay in hours	47.70	Sick Pay in hours	800.00	Personal Pay in hours	16.00
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[Full Leave Balance Information](#)

### Pay Information

Latest Pay Stub: [01/08/2015](#) [All Pay Stubs](#) [Direct Deposit Information](#) [Deductions History](#)

### Earnings

Year to Date Earnings: \$1,368.00 [Earnings By Date Range](#) [Earnings By Position](#)

### Benefits

[Current Summary](#) [Current Enrollment](#) [Beneficiaries and Dependents](#) [Life Event Change](#)

### Taxes

**Federal Tax** [W-4 Employee's Withholding Allowance Certificate](#) [W-2 Wage and Tax](#)

### My Activities

[Enter Time](#)

[Request Time Off](#)

- Time Sheet
- Leave Report
- Effort Certification
- Labor Redistribution
- Campus Directory
- Position Description

ellucian..

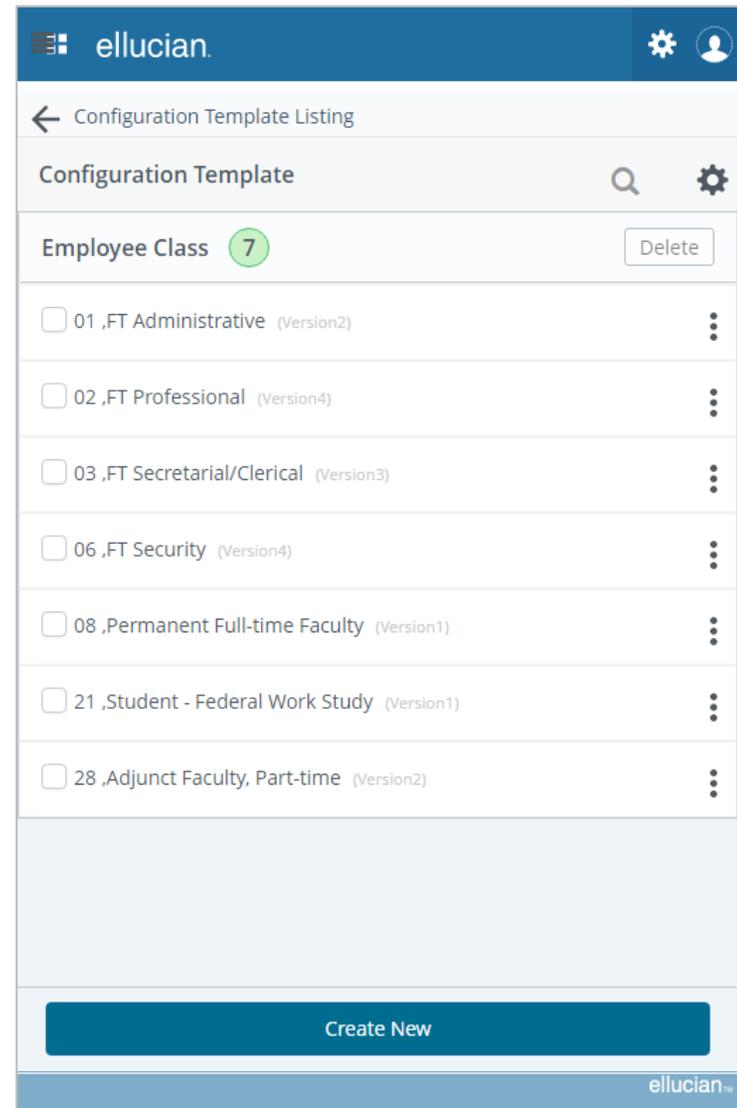
## Position Description

### A Position Description defines:

- Duties and responsibilities
- Requirements of a position

### Uses include:

- Library of position descriptions
- Structured information to pass to other decision tools
- Clear data to post job openings
- Engage in for employee reviews or grievances
- Succession planning
- Reorganizations



# Position Description - Dashboard

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⚙️ 👤

[Position Description Library](#) • Position Description

## Position Description

Please enter 2 or more characters 🔍

Advanced Search ⚙️

📁 Position Description Library
📄 Position Description
⚙️ Configuration Template
Create New

In Progress 2
⤴

Position Number	Position Class	Employee Class	Effective Date	Status	
-	-	02-FT Professional	11/30/2015	In Progress	⋮
-	-	02-FT Professional	03/11/2016	In Progress	⋮

Submitted Queue 0
⤴

Approvals 1
⤴

Position Number	Position Class	Employee Class	Effective Date	Status	
C10009-Senior Secretary Math Dept	CFP03-Senior Secretary	03-FT Secretarial/Clerical	09/01/2015	Pending	⋮

# Enhanced Effort Reporting

ellucian

Lisa Q Alber

Employee Dashboard • Effort Certification • Effort Report

Lisa Q Albers - HOPER0011 Print ×

[Effort Report](#)
[Pay Period Summary](#)
[Comments](#)
[Routing Queue](#)

**Sponsored**

Fund	Organization	Effort Category	Charge Type	Effort
EC2111 Music and Alzheimers disease	ECO002 EC Testing Org 2	DRORGRCH Direct Organized Research	DIRECT	20

**Total Sponsored Activity 20%**

**Non Sponsored**

Fund	Organization	Effort Category	Charge Type	Effort
EC2149 Departmental Administration	ECO006 EC Testing Org 6		DIRECT	20

**Total Non Sponsored Activity 20%**

**Allocated**

Fund	Organization	Effort
EC2115 Music and brain injuries	ECO004 EC Testing Org 4	60

**Total Allocated Activity 60%**

Total : 100%

**Effort Report Overview** ^

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**Report Status**

GS0415  
Grad Students, April 2015  
May 01, 2015 - May 31, 2015

Completed - Unlocked

Effort Allocated by Anna Deposit, December 23, 2016

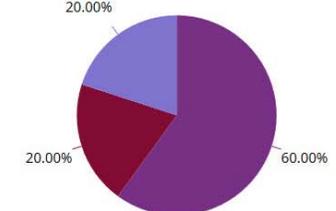
**Important Dates**

Begin Pre-Review Certification Period  
May 01, 2015 to May 31, 2015  
Post Review End  
June 30, 2015

**Pay Dates**

BK - 8 March 27, 2015-April 09, 2015  
BK - 9 April 10, 2015-April 23, 2015  
MK - 4 March 15, 2015-April 14, 2015

**Funding Chart** ^



60.00%  
20.00%  
20.00%

Request Changes
Add New Funding
View Effort Allocation
Save

# Streamlined Labor Redistribution

ellucian Graham James Potts

Employee Dashboard • Labor Redistribution • Approvals

Approvals Advanced Search

Person Search Approvals Proxy or Superuser

Select Batch Unselect Batch Open

### Redistribution Approvals

Select	Batch ID	First Name	Last Name	ID	Pay Year	Pay ID	Pay Number	Sequence	Action	Comments
		Jennifer	Burns	71000003	1994	MN	7	2	Acknowledge	
<input type="checkbox"/>	218	Jeanette	Rosen	HOPLR0019	2014	MK	2	6	Acknowledge	
		Jeanette	Rosen	HOPLR0019	2015	MK	9	2	Acknowledge	
		Derrick	Insley	HOPER0004	2014	BK	2	2	Approve	
		Jeanette	Rosen	HOPLR0019	2015	MK	12	2	Acknowledge	
		Derrick	Insley	HOPER0004	2015	BK	24	2	Acknowledge	
		Peggy	Lanham	HOPER0006	2015	BK	1	2	Acknowledge	
		Jeanette	Rosen	HOPLR0019	2014	MK	12	2	Acknowledge	
		Leon	Martel	HOPSD0006	2015	MK	5	2	Acknowledge	
<input type="checkbox"/>	234	Marshall	Young	71100006	1993	ST	9	2	Acknowledge	
<input type="checkbox"/>	218	Jeanette	Rosen	HOPLR0019	2014	MK	3	6	Acknowledge	
<input type="checkbox"/>	216	Jeanette	Rosen	HOPLR0019	2014	MK	8	2	Acknowledge	

Results found: 12

K < Page 1 of 1 > | Per Page 50

# Communication Management

## Key Features:

- Features work across the Banner enterprise
- Manages transactional connections to your constituents using Banner data
- Set notifications or reminders to register for classes or when tuition is past due

The screenshot displays the ellucian UNIVERSITY Communication Management interface. The top navigation bar includes the user name 'John Hancock', 'Sign Out', and 'Notifications'. The main content area is divided into two sections: 'Templates' and 'Communication Jobs'.

**Templates Section:**

- Search By Template Name: [Search Box]
- Buttons: Open, Copy, Add, Delete
- Tabbed interface: Templates (selected), Data fields
- Table with columns: Template Name, Folder, Description, Status

Template Name	Folder	Description	Status
220158_2G_App_Ack	Graduate and Professional Admissions	Fall 2015 - Application Acknowledgement	Inactive
Building Notice	General	Emergency Notice	Active
Dean's letter for award winning individuals	Student	Letter for those individuals who received awards	Inactive
FA Award Letter 03042015	FinAid	Financial Aid Award Letter for New Students	Inactive
Faculty Replacement Notice			
Female Test Email-MLQ			
General Notice to Female Students			
HL- Reminder to Submit Immun Records			
Letter of Acceptance			
Math Invitation			
Missing Documentation			
MV Template			

**Communication Jobs Section:**

- Search by Job Name: [Search Box]
- Buttons: Create Message, Open, Stop Job, Delete Job
- Table with columns: Errors Exist, Job Status, Job Name, Created Date, Creator, Population Name, Template Name, Organization

Errors Exist	Job Status	Job Name	Created Date	Creator	Population Name	Template Name	Organization
	Completed	Direct Deposit Notification 08282016	Aug 26, 2016 09:21:51 AM	CHEBY	Direct Deposit Change Eby	Direct Deposit Change	Ellucian University
	Completed	CCH -Teste	Aug 26, 2016 09:15:46 AM	SHYCH E	Test Student	AA Recruitment Message	Ellucian University
	Stopped	Testing - CMcG	Aug 26, 2016 09:08:44	SHYCH E	History Majors	Graduation-Apply for Graduation	Ellucian University

Navigation: 1 of 9, Per Page 20, Results 176

## Expanding Banner 9 Functionality

### Personal Information Self-Service

- View, edit and update biographic and demographic information
- Will display first/middle/last and preferred name in Personal Details, yet support name display differently in Overview section
- Configurable using the Integration Configuration Settings (GORICCR) page
- Direct Deposit and Personal Information functionality merged into single application
- Easier to update and configure, by institution



# Personal Information Self-Service



Morgan Bella Van Gaddis

ID Number: MYE000002

bellaVG@campus.edu

321 Street, Media, Pennsylvania 19063

215 1236789 12

## Personal Details Edit

**First Name**  
Bella

**Middle Name**  
-

**Last Name**  
Gaddis

**Date of Birth**  
January 11, 1975

**Marital Status**  
Single

**Legal Sex**  
Female

**Preferred First Name**  
Morgan

**Personal Pronoun**  
She

**Gender Identification**  
Non-binary/third gender

## Email Add New

**Campus E-Mail (Preferred)**  
bellaVG@campus.edu  
This is the campus email address.

**AOL Email**  
bellas@aol.com  
Email address for AOL

**Parent E-Mail**  
momsemail@test.com  
This is Mom's email address.

## Phone Number Add New

**Billing (Primary)**  
215 1236789 12

**Billing (Primary)**  
+014251787878787

**Fax (Unlisted)**  
215 4045959

**Phone test**  
+12342355678

**Permanent (Primary) (Unlisted)**  
+14081234567

## What we've heard . . .

*"The moment that I was able to sort on sequence number, then have the ability to replace the sequence numbers and save in one transaction, **it was as if a light shined over my monitor with a faint chorus in the background. I was thrilled to see that improvement.**"*

***Stephanie Boledovich, HR Systems Manager, Lansing Community College***

*"Employee Profile is a modern way of letting employees look at their own data and do their job and they can take it anywhere, because it is configured to work on any device – laptop, tablet and smartphone. **Well done Ellucian! I love it. It is so easy to set up even a cave man can do it.**"*

***Ali Penton, Software Application Engineer, University of West Florida***

**More stories on eCommunities**

*"We went actually live with Registration for our early registration for the following summer classes and it proved flawless. **It worked with no problems and every review we've had has been positive.**"*

***-Delano Sweeney, Database Systems Manager, Bluefield State College***

Banner 9 Guide at [www.ellucian.com/banner9guide](http://www.ellucian.com/banner9guide)

See Ellucian Live videos on Banner 9

<https://banner9guide.ellucian.com/content/ellucian-live-videos>

**Your guide to adopting Banner 9**

Plan Your Upgrade    Get Current and Enable SSO    Analyze Your Modifications    Prepare Your Team

This site is your one-stop-shop for deploying Banner 9 applications. Banner 9's strategy makes it easier and more efficient for institutions to implement, manage, and extend our solutions. This innovative strategy supports improved functionality, better integration, more agile development, expanded points of access for users, and innovative delivery methods. But don't take our word for it, here's what other institutions have to say:

**Get Started**

**Learn More**

- Ellucian Vision
- Moving to Banner 9
- Ellucian e-Communities Banner

**Surprisingly easy**

Aims Community College talks about Banner 9

**Why Banner 9?**

With Banner 9, you can:

- Evolue your digital campus**  
With APIs and web services wrapped around our solutions, you have the flexibility to integrate with other systems whether that includes solutions from Ellucian, an Ellucian partner, or a third party.
- Add smart functionality cost-efficiently**  
Get the system improvements you need more quickly and for a lower total cost of ownership.

**Available Applications**

**Ellucian Live Videos**

Keynote sessions    Functional sessions    Technical sessions

**Keynote session**

Session 99056 - What's New with Banner 9

**Download slides**

"With Banner 9, you will be in a position to delight your key stakeholders - that means your students, your faculty members, your staff. Banner 9 delivers you a natural, user friendly experience with intuitive navigation, enhanced features and the ability to use it on all mobile devices."  
-Kari Branjord

**Functional sessions**

Session 98078 - A Functional Perspective on Implementing Banner 9

Session 97773 - Tyler Junior College Shares Strategy for Banner 9

## Places to Find More Information



### Demos

- [Admin – Human Resources](#)
- [Self Service - Employee Profile](#)

### [eCommunities](#)

- Banner user community - Global Search feature that now pulls from eCommunities, the Ellucian Support Center and the Ellucian.com website

### [Attend an Ellucian education class](#)