



Finance Focus for Banner 9

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

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

The Administrative Staff Experience

With Banner 9...

Natural user experience

Simplified methods of communication

New capabilities focused on streamlining critical business processes

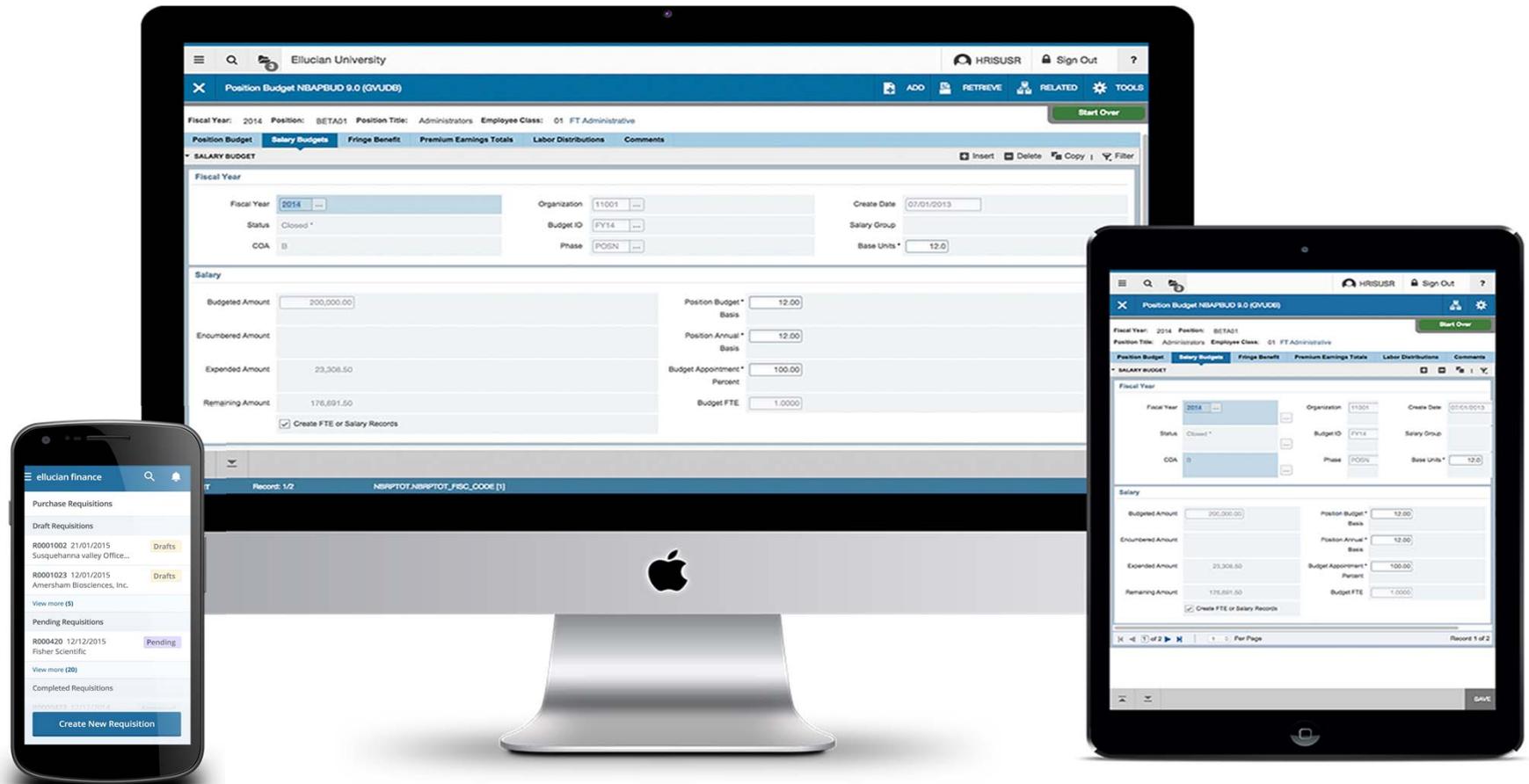
Impact to Staff

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

Stay better connected across the institution

Drive efficiencies with automation and process re-engineering

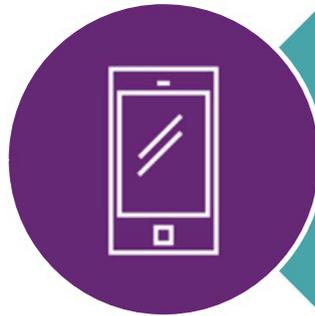
Banner 9's New Look & Feel



Tablet Friendly: Banner on-the-go

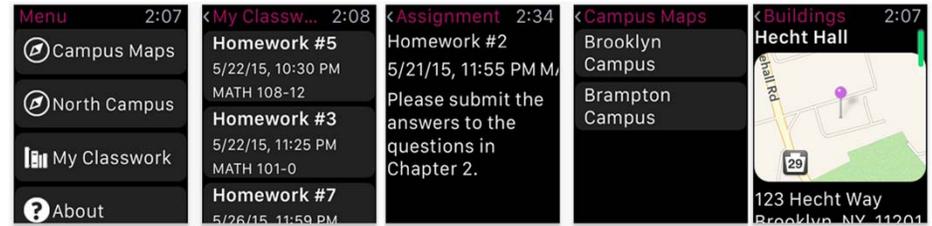


Supporting Constituents On The Go With All Devices

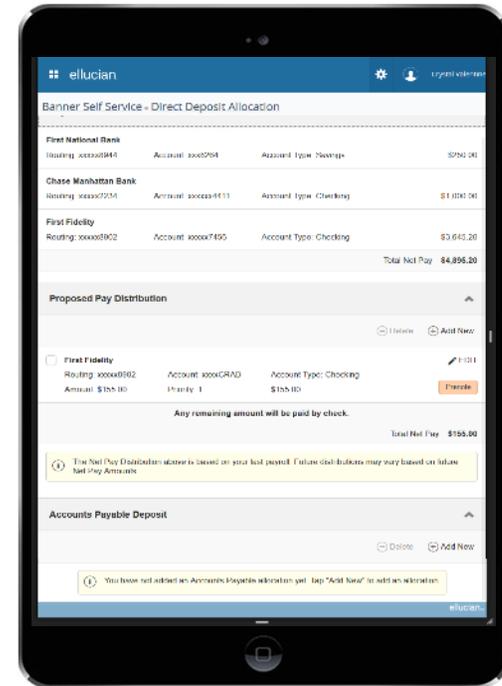


**Ellucian Solutions
Incorporate Mobility
and Web 2.0 into
administrative
systems
architecture**

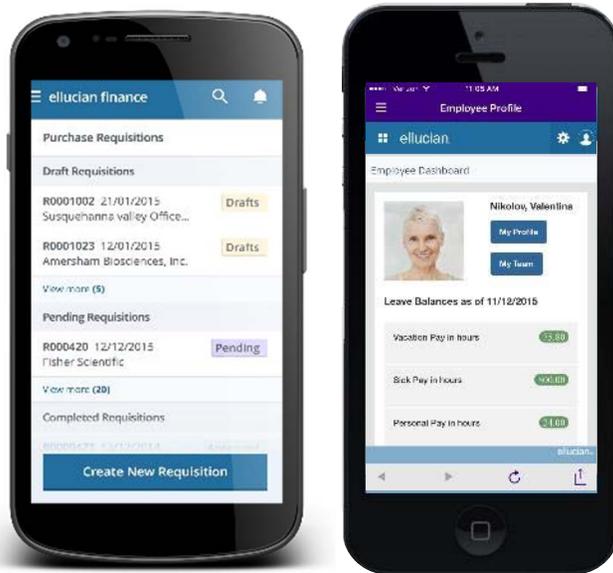
Watches



Tablets



Phones



Release 9 Administrative Improvements

Old Oracle Forms

New Admin Transformed

The image compares two versions of an Oracle Forms application. The left side shows the 'Old Oracle Forms' interface, which is a traditional web-based form with a menu bar, a title bar, and a main content area with various input fields. The right side shows the 'New Admin Transformed' interface, which is a modernized version with a more structured layout, including a header with navigation and search options, a main content area with tabs for different sections, and a footer with activity information and a save button.

Old Oracle Forms Interface:

- Browser title: Oracle Developer Forms Runtime - Web: Open > SPAIDEN
- Menu: File Edit Options Block Item Record Query Tools Help
- Page Title: General Person Identification SPAIDEN 8.5.3.1 (SMPL)
- Form Fields: ID: N00012149, Name: Baker, Boris
- Section: **Person**
- Fields: Last Name: Baker, First Name: Boris, Middle Name: , Prefix: Mr, Suffix: Sr, Preferred First Name: Boris, Full Legal Name: Boris Baker
- Section: **Non-Person**
- Field: Name:
- Footer: FRM-40400: Transaction complete: 1 records applied and saved. Record: 1/1

New Admin Transformed Interface:

- Page Title: Ellucian University
- Page Subtitle: Person Identification - HR PPAIDEN 9.0 (SMPLP)
- Page Action: Start Over
- Section: **Current Identification**
- Fields: ID: N00013510, Name Type: ALUM, Alumni ID
- Section: **PERSON**
- Fields: ID: N00013510, SSN/SIN/TIN: , Name Type: , Last Name: Abate, Preferred First Name: , First Name: Constance, Full Legal Name: , Middle Name: , Marital Status: S Single, Prefix: , Suffix:
- Section: **NON-PERSON**
- Field: Name:
- Footer: Activity Date 07/16/2008 12:30:12 PM Activity User CMCCORMI SAVE

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 '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), Salary Group, and Base Units (12.0). The 'Salary' section includes Budgeted Amount (200,000.00), Encumbered Amount, Expended Amount (23,308.50), Remaining Amount (176,691.50), Position Budget Basis (12.00), Position Annual Basis (12.00), Budget Appointment Percent (100.00), and Budget FTE (1.0000). A checkbox for 'Create FTE or Salary Records' is checked. At the bottom, a table navigation bar shows '1 of 2' records and '1 Per Page'. A 'SAVE' button is visible in the bottom right corner.

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 pointing to the search bar with the text "Add your institution name", one pointing to the background image with the text "Set your own background image", and one pointing to the search bar with the text "Search for and open new and legacy Banner forms using normal language or seven character abbreviation." 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...

Add your institution name

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

Set your own background image

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

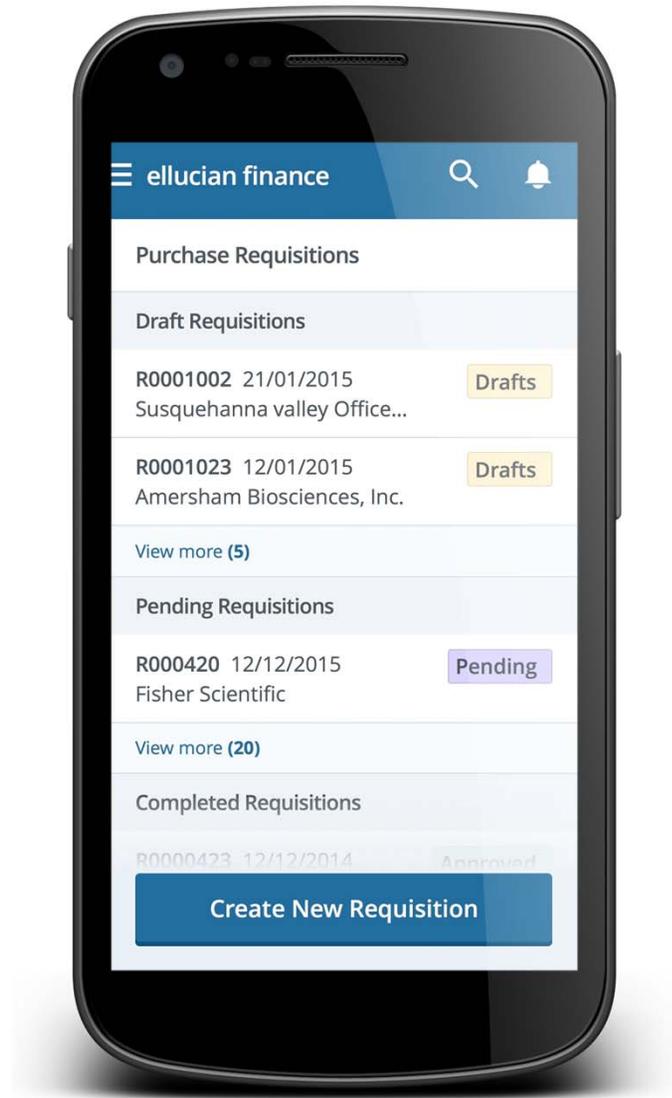
This software contains confidential and proprietary information of Ellucian and its subsidiaries. Use of this software is limited to Ellucian licensees, and is subject to the terms and conditions of one or more written license agreements between Ellucian and the licensee in question.

Keyboard Shortcuts

Purchase Requisition

Purchase Requisition – Mobile

- One dashboard that shows all of your purchase requisitions and their statuses
- Easy to create or review a purchase requisition from any device



Purchase Requisition

ellucian

Kristy Elliott

Purchase Requisition • Edit Requisition

Edit Requisition

 Attachments
 Delete Requisition

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Requisition Number

Chart *

Requestor *

Organization *

Transaction Date *

Delivery Date *

Ship To Location *

Attention To *

Choose Accounting Type

 Document Level Accounting

Tax Group

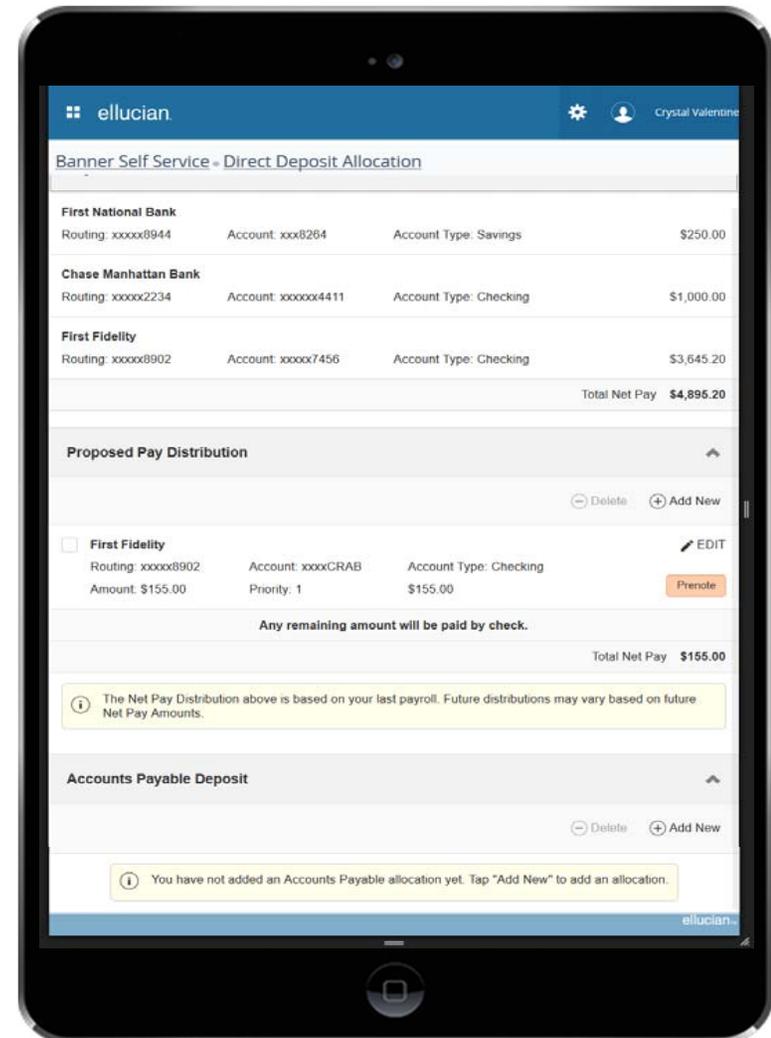
Requisition Summary
Save as draft

Requisition Number	R1600841
A. Daigger (ADAIG) 7834 Route 29 Malvern PA 19355	
Commodities (1)	
Air Fare (AIRFARE)	735.00
Quantity 5.00 @ 150.0000	Discount 15.00
Additional Charges 0.00	Tax 0.00

ellucian

Direct Deposit

- Enables ease of entry to add, edit, or delete account details for **both** Accounts Payable and Payroll transactions
- Improves security and administration of bank account information
- Includes constituent notification capabilities for added and changed entries
- Mobile, tablet, and desktop ready



Direct Deposit

ellucian.

 Cynthia Gordon

Banner Self Service • [Direct Deposit Allocation](#)

Bank Name	Routing Number	Account Number	Account Type	Amount	Priority	Net Pay Distribution	Status
<input type="checkbox"/> First National Bank	xxxxx8944	xxx3697	Checking ▼	\$2,000.00 ▼	1 ▼	\$2,000.00	Active
<input type="checkbox"/> First National Bank	xxxxx8944	xxx6979	Savings ▼	Remaining ▼	2 ▼	\$2,565.39	Active
Total Net Pay						\$4,565.39	

i The Net Pay Distribution above is based on your last payroll. Future distributions may vary based on future Net Pay Amounts.

i Only one Accounts Payable Deposit can exist at a time. Edit the existing deposit, or select and delete it before adding a new deposit.

Accounts Payable Deposit ▲

You can point out the differences between the regular Payroll direct deposit with multiple accounts and ability to identify % or \$ amount versus Accounts Payable where it is 100% deposited into the Bank and Account information chosen. Remember, this won't be applicable to all LAC prospects/clients, as I asked Jose Luis to confirm...so you don't have to spend a lot of time on it.

Bank Name	Routing Number	Account Number	Account Type	Status
<input type="checkbox"/> First National Bank	xxxxx8944	xxx3697	Checking ▼	Prenote

By checking this box, I authorize the institution to initiate direct credits or debits on my behalf

ellucian..

My Finance Query



ellucian university ⚙️ Dr. Xavier James

[My Finance](#) • [My Finance Query](#) • Favorites

Favorites 🔍 New Query

Favorites | Saved Queries | My Funds | High - Low | New Query

Entomology 2

Multi Year

Revenue	\$1,901.00
Expense	\$1,501.00
Net	\$400.00

03/14/2017 ★ ➔ 🗑️

Clinical Research

Budget

Revenue	\$25,000.00
Expense	\$3,820.00
Net	\$21,180.00

03/14/2017 ★ ➔ 🗑️

BioScience

Multi Year

\$3,499 available
\$1,501 spent of \$5,000

03/14/2017 ★ ➔ 🗑️

Biology 1

Multi Year

\$4,500,000 available
\$500,000 spent of \$5,000,000

03/14/2017 ★ ➔ 🗑️

Animal Science1

Budget

\$42,596 exceeded
\$167,596 spent of \$125,000

03/14/2017 ★ ➔ 🗑️

Nutritional Science

Encumbrance

\$441 remaining
\$356 liquidated of \$798

03/14/2017 ★ ➔ 🗑️

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', a 'Sign Out' button, and a 'Notifications' icon. The main content area is divided into two sections: 'Templates' and 'Communication Jobs'.

Templates Section:

Search By Template Name:

Buttons: Open, Copy, Add, Delete

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:

Buttons: Create Message, Open, Stop Job, Delete Job

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

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:

- Evolve 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

"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

Presenter: Kari Branjord, Ellucian, SVP Product Management

Download slides

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 – Finance](#)
- [Self-Service – Direct Deposit](#)

[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](#)