



## 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

### Student

- Registration
- Student Advising Profile
- Attendance Tracking
- Faculty Grade Entry
- Class Roster

### Finance & HR

- Purchase Requisition
- Direct Deposit
- My Finance Query
- Employee Profile
- Position Description
- Effort Reporting
- Labor Redistribution

### General

- Communication Management
- Personal Information

- Banner General
- Banner Student
- Banner Human Resources
- Banner Finance
- Banner Financial Aid
- Banner Student Aid
- Banner Advancement
- Banner Accounts Receivable



# The Administrative Staff Experience

## With Banner 9...

Natural user experience

Simplified methods of communication

New capabilities focused on streamlining critical business processes

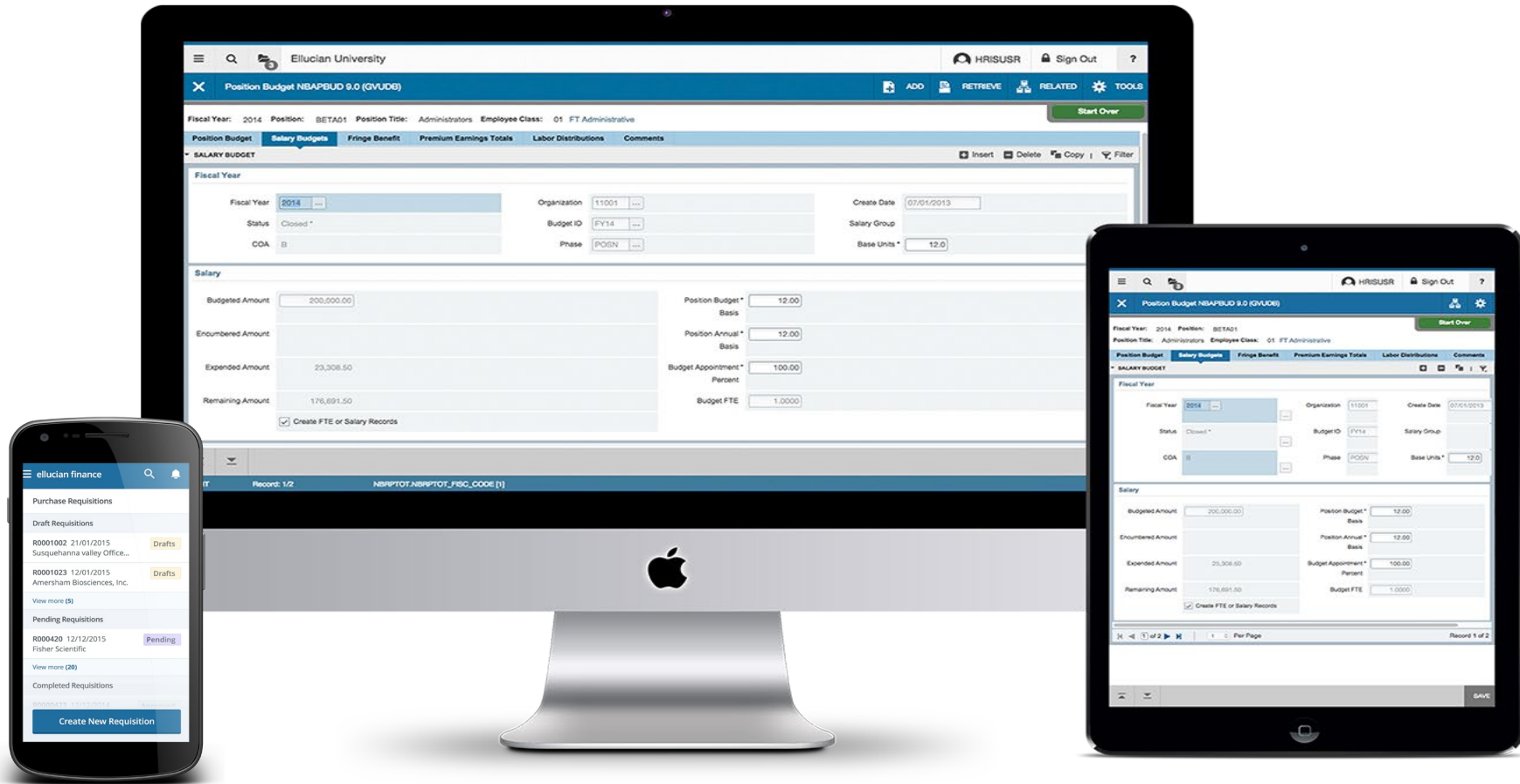
## Impact to Staff

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

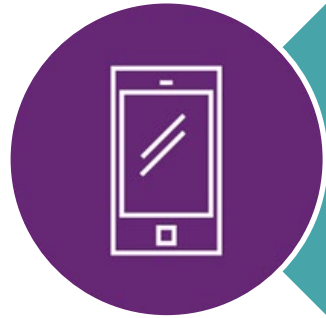


# Tablet Friendly: Banner on-the-go



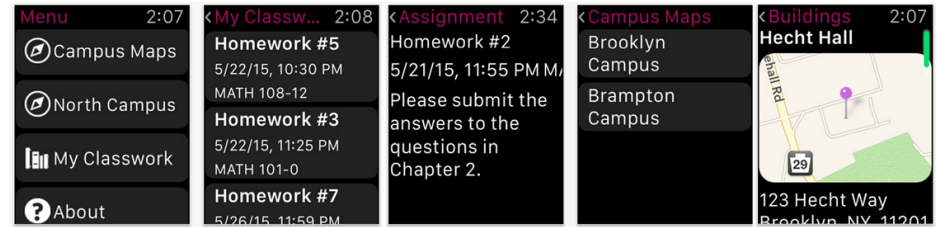


# Supporting Constituents On The Go With All Devices

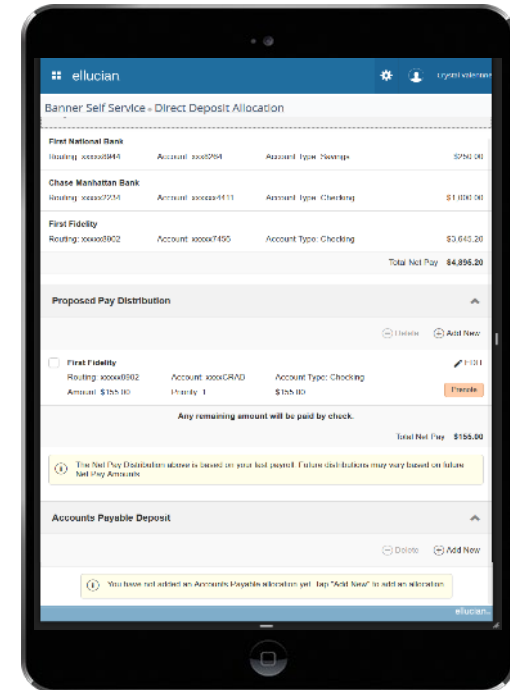


**Ellucian Solutions  
Incorporate Mobility  
and Web 2.0 into  
administrative  
systems  
architecture**

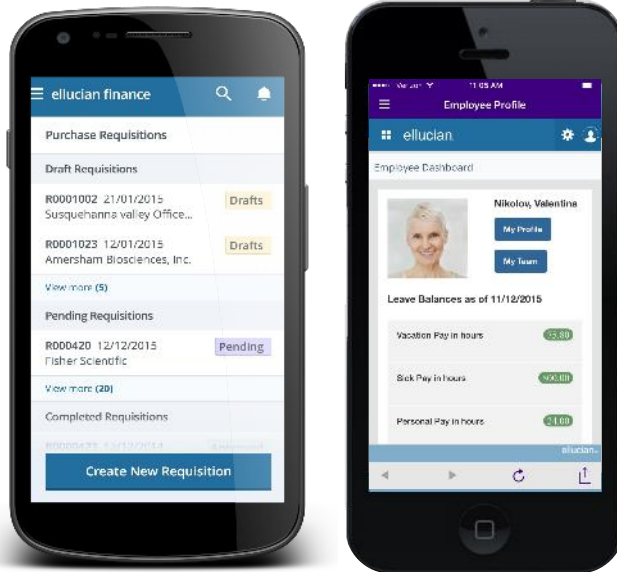
## Watches



## Tablets



## Phones



# Release 9 Administrative Improvements

## Old Oracle Forms

Oracle Developer Forms Runtime - Web: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Help

General Person Identification SPAIDEN 8.5.3.1 (SMPL)

ID:

Current Identification Alternate Identification Address

ID:  Name Type:   Alumni ID

**Person**

Last Name:

First Name:

Middle Name:

Prefix:

Suffix:

Preferred First Name:

Full Legal Name:

**Non-Person**

Name:

FRM-40400: Transaction complete: 1 records applied and saved.  
Record: 1/1 <OSC>

## New Admin Transformed

Ellucian University

Person Identification - HR PPAIDEN 9.0 (SMPLP)

ID: N00013510 Constance Abate

Start Over

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

▼ CURRENT IDENTIFICATION

ID  SSN/SIN/TIN

Name Type

▼ PERSON

Last Name  Preferred First Name

First Name  Full Legal Name

Middle Name  Marital Status   Single

Prefix

▼ NON-PERSON

Name

Activity Date 07/16/2008 12:30:12 PM Activity User CMCCORMI

SAVE

# Enhanced User Interface

Ellucian University

Position Budget NBAPBUD 8.8 (GVUDB)

Fiscal Year: 2014 Position: BETA14 Position Title: Administrators Employee Class: 01 FT Administrative

Position Budget Salary Budgets Fringe Benefit Premium Earnings Totals Labor Distributions Comments

SALARY BUDGET

Fiscal Year

Fiscal Year: 2014 Organization: 11001 Create Date: 07/01/2013

Status: Closed \* Budget ID: FY14 Salary Group:

COA: B Phase: POSN Base Units: 12.0

Salary

Budgeted Amount: 200,000.00 Position Budget Basis: 12.00

Encumbered Amount: Position Annual Basis: 12.00

Expended Amount: 23,308.50 Budget Appointment Percent: 100.00

Remaining Amount: 176,691.50 Budget FTE: 1.0000

Create FTE or Salary Records

1 of 2 Per Page

EDIT Record: 1/2 NBRPTOT.NBRPTOT\_FISC\_CODE [1] ellucian™

PLEICHLI Sign Out ?

ADD RETRIEVE RELATED TOOLS

Start Over

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. At the top, there is a navigation bar with a search box containing "Ellucian University", a user profile for "VNIKOLOV", and a "Sign Out" button. Below the navigation bar is a large banner image of a university building with the word "Welcome" in the center. A search bar is overlaid on the banner with the text "Search for forms, pages and menus...". Three callout boxes provide instructions: one pointing to the search box in the navigation bar, one pointing to the banner image, and one pointing to the search bar on the banner. The footer contains copyright information, a release version, and keyboard shortcuts.

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

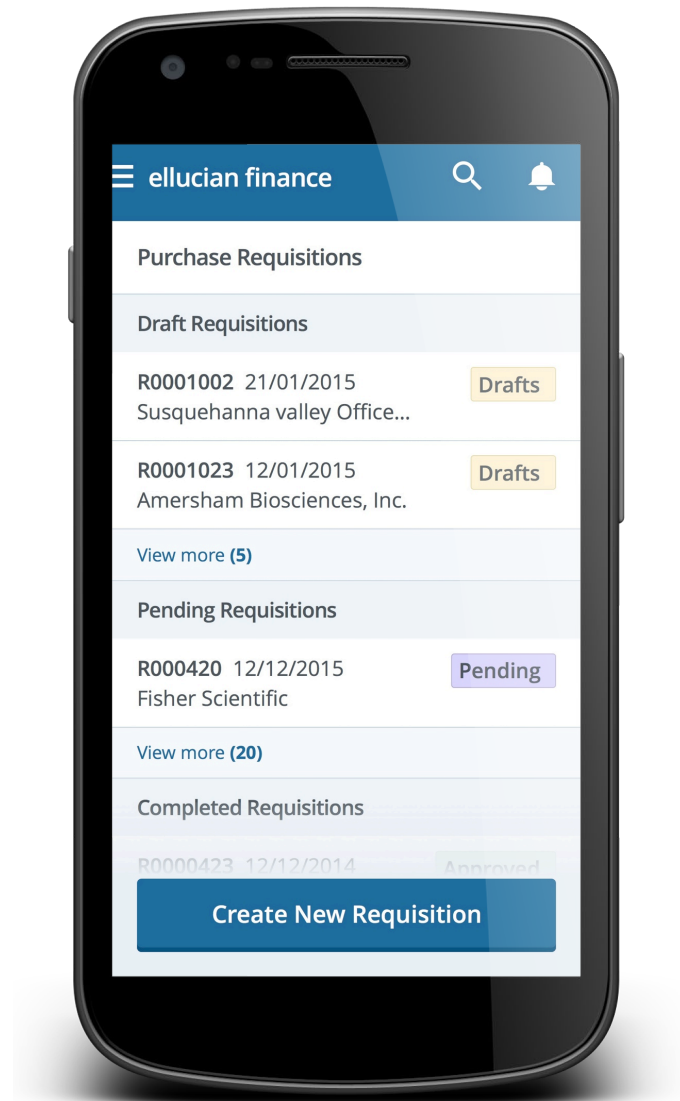
This software contains confidential and proprietary information of Ellucian and its subsidiaries. Use of this software is limited to Ellucian licensees, and is subject to the terms and conditions of one or more written license agreements between Ellucian and the licensee in question.

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

## Edit Requisition

Attachments Delete Requisition

### 1 Requestor Information

### 2 Vendor Information

### 3 Add Item & Accounting

Requisition Number

R1600841

Requestor\*

Kristy Elliott

Transaction Date\*

10/29/2015

Delivery Date\*

10/31/2015

Chart\*

B Ellucian Higher Education

Organization\*

11007 Department of Mathem...

Ship To Location\*

ART\_SC H. Malthusin Ph.D.

Attention To\*

H. Malthusin

Tax Group

NT No Tax...

Choose Accounting Type

Document Level Accounting

### Requisition Summary

Save as draft

Requisition Number

R1600841

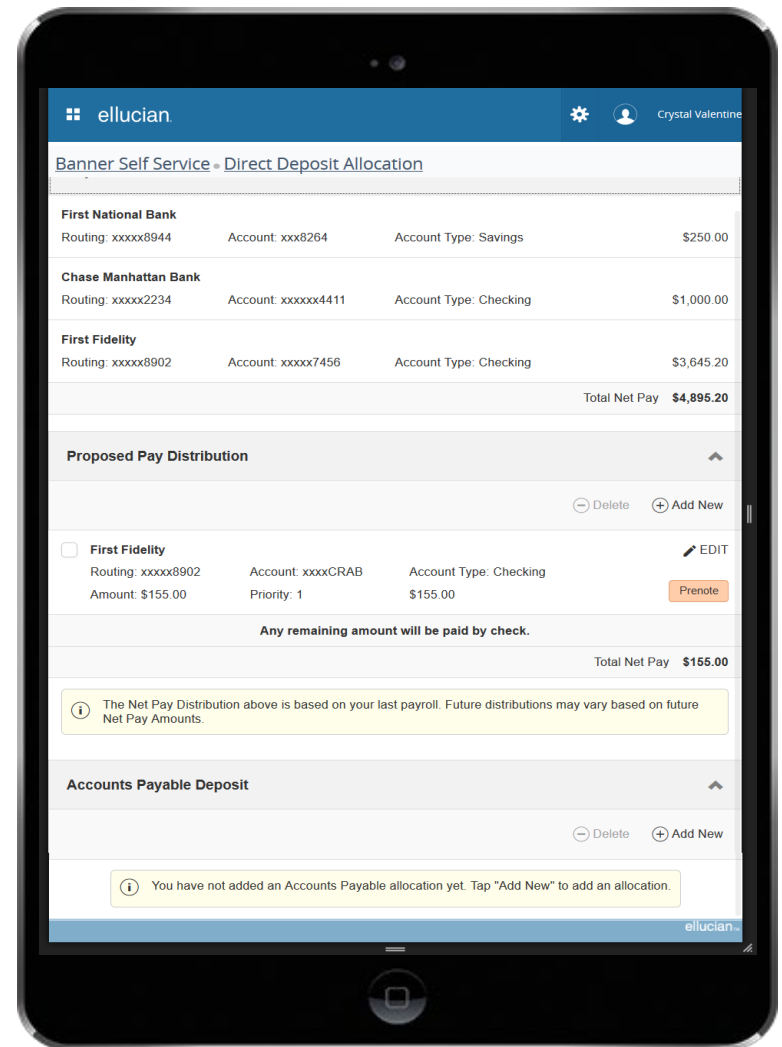
A. Daigger (ADAIG)  
7834 Route 29  
Malvern PA 19355

Commodities (1)

Air Fare (AIRFARE)	735.00
Quantity 5.00 @ 150.0000	Discount 15.00
Additional Charges 0.00	Tax 0.00

# 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

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 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	xxxx8944	xxx3697	Checking ▼	\$2,000.00 ▼	1 ▼	\$2,000.00	Active
<input type="checkbox"/> First National Bank	xxxx8944	xxx6979	Savings ▼	Remaining ▼	2 ▼	\$2,565.39	Active
						<b>Total Net Pay \$4,565.39</b>	

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	xxxx8944	xxx3697	Checking ▼	Prenote

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

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# My Finance Query



June 2017

ellucian university



Dr. Xavier James

My Finance • My Finance Query • Favorites

Favorites

Search Query



New Query

Favorites

Saved Queries

My Funds

High - Low



New Query



## Entomology 2

Multi Year



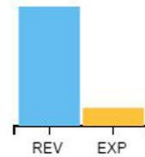
Revenue : \$1,901.00  
Expense : \$1,501.00  
Net : \$400.00

03/14/2017



## Clinical Research

Budget



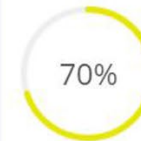
Revenue : \$25,000.00  
Expense : \$3,820.00  
Net : \$21,180.00

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:

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			
Hil- Reminder to Submit Immun Records			
Letter of Acceptance			
Math Invitation			
Missing Documentation			
MV Template			

**Communication Jobs Section:**

Search by Job Name:

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 09:09:11	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

**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

**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

**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***