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 or 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

<table>
<thead>
<tr>
<th>Administrative Applications</th>
<th>Self-Service Applications</th>
<th>General</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Banner General</td>
<td><strong>Student</strong></td>
<td>• Communication Management</td>
</tr>
<tr>
<td>• Banner Student</td>
<td>• Registration</td>
<td>• Personal Information</td>
</tr>
<tr>
<td>• Banner Human Resources</td>
<td>• Student Advising Profile</td>
<td></td>
</tr>
<tr>
<td>• Banner Finance</td>
<td>• Attendance Tracking</td>
<td></td>
</tr>
<tr>
<td>• Banner Financial Aid</td>
<td>• Faculty Grade Entry</td>
<td></td>
</tr>
<tr>
<td>• Banner Student Aid</td>
<td>• Class Roster</td>
<td></td>
</tr>
<tr>
<td>• Banner Advancement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Banner Accounts Receivable</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Phones

Tablets
Release 9 Administrative Improvements

Old Oracle Forms

New Admin Transformed
Enhanced User Interface

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

Standard tools and logout information.
Application Navigation - Release 9 Administrative Improvements

Personalized Banner Admin Landing Page

- Set your own background image
- Add your institution name
- Search for and open new and legacy Banner forms using normal language or seven character abbreviation.
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

1. Requestor Information
   - Requisition Number: R1600841
   - Requestor: Kristy Elliott
   - Transaction Date: 10/29/2015
   - Delivery Date: 10/31/2015

2. Vendor Information
   - Chart: B Ellucian Higher Education
   - Organization: 11007 Department of Mathem...

3. Add Item & Accounting
   - Ship To Location: ART_SC H. Malthusin Ph.D.
   - Attention To: H. Malthusin
   - Tax Group: NT No Tax...

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

Attachments
Delete Requisition
Save as draft
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

### Banner Self Service - Direct Deposit Allocation

<table>
<thead>
<tr>
<th>Bank Name</th>
<th>Routing Number</th>
<th>Account Number</th>
<th>Account Type</th>
<th>Amount</th>
<th>Priority</th>
<th>Net Pay Distribution</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>First National Bank</td>
<td>xxxx8944</td>
<td>xxx3697</td>
<td>Checking</td>
<td>$2,000.00</td>
<td>1</td>
<td>$2,000.00</td>
<td>Active</td>
</tr>
<tr>
<td>First National Bank</td>
<td>xxxx8944</td>
<td>xxx6979</td>
<td>Savings</td>
<td>Remaining</td>
<td>2</td>
<td>$2,565.39</td>
<td>Active</td>
</tr>
</tbody>
</table>

Total Net Pay: $4,565.39

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

2. 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.

<table>
<thead>
<tr>
<th>Bank Name</th>
<th>Routing Number</th>
<th>Account Number</th>
<th>Account Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>First National Bank</td>
<td>xxxx8944</td>
<td>xxx3697</td>
<td>Checking</td>
<td>Pending</td>
</tr>
</tbody>
</table>

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

- **Entomology 2**
  - Revenue: $1,901.00
  - Expense: $1,501.00
  - Net: $400.00
  - Date: 03/14/2017

- **Clinical Research**
  - Revenue: $25,000.00
  - Expense: $3,820.00
  - Net: $21,180.00
  - Date: 03/14/2017

- **BioScience**
  - $3,499 available
  - $1,501 spent of $5,000
  - Date: 03/14/2017

- **Biology 1**
  - $4,500,000 available
  - $500,000 spent of $5,000,000
  - Date: 03/14/2017

- **Animal Science 1**
  - $42,596 exceeded
  - $167,596 spent of $125,000
  - Date: 03/14/2017

- **Nutritional Science**
  - $441 remaining
  - $356 liquidated of $798
  - Date: 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
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

## Personal Details

<table>
<thead>
<tr>
<th>First Name</th>
<th>Middle Name</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bella</td>
<td>-</td>
<td>Gaddis</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date of Birth</th>
<th>Marital Status</th>
<th>Gender Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 11, 1975</td>
<td>Single</td>
<td>Non-binary/third gender</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Preferred First Name</th>
<th>Personal Pronoun</th>
</tr>
</thead>
<tbody>
<tr>
<td>Morgan</td>
<td>She</td>
</tr>
</tbody>
</table>

## Email

<table>
<thead>
<tr>
<th>Campus E-Mail (Preferred)</th>
<th>AOL Email</th>
<th>Parent E-Mail</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:bellaVG@campus.edu">bellaVG@campus.edu</a></td>
<td><a href="mailto:bellas@aol.com">bellas@aol.com</a></td>
<td><a href="mailto:momsemail@test.com">momsemail@test.com</a></td>
</tr>
<tr>
<td>This is the campus email address.</td>
<td>Email address for AOL</td>
<td>This is Mom's email address.</td>
</tr>
</tbody>
</table>

## Phone Number

<table>
<thead>
<tr>
<th>Billing (Primary)</th>
<th>Billing (Primary) (Unlisted)</th>
<th>Fax (Unlisted)</th>
</tr>
</thead>
<tbody>
<tr>
<td>215 1236789 12</td>
<td>+01425178787878</td>
<td>215 4049959</td>
</tr>
<tr>
<td></td>
<td>+1234235657</td>
<td></td>
</tr>
<tr>
<td></td>
<td>+14081234567</td>
<td></td>
</tr>
</tbody>
</table>

## Contact Information

- Morgan Bella Van Gaddis
- ID Number: MYE000002
- 321 Street, Media, Pennsylvania 19063
- 215 1236789 12
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

“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
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