



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

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

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

The Administrative Staff Experience

With Banner 9...

Natural user
experience

Simplified methods
of communication

New capabilities
focused on streamlining
critical business
processes

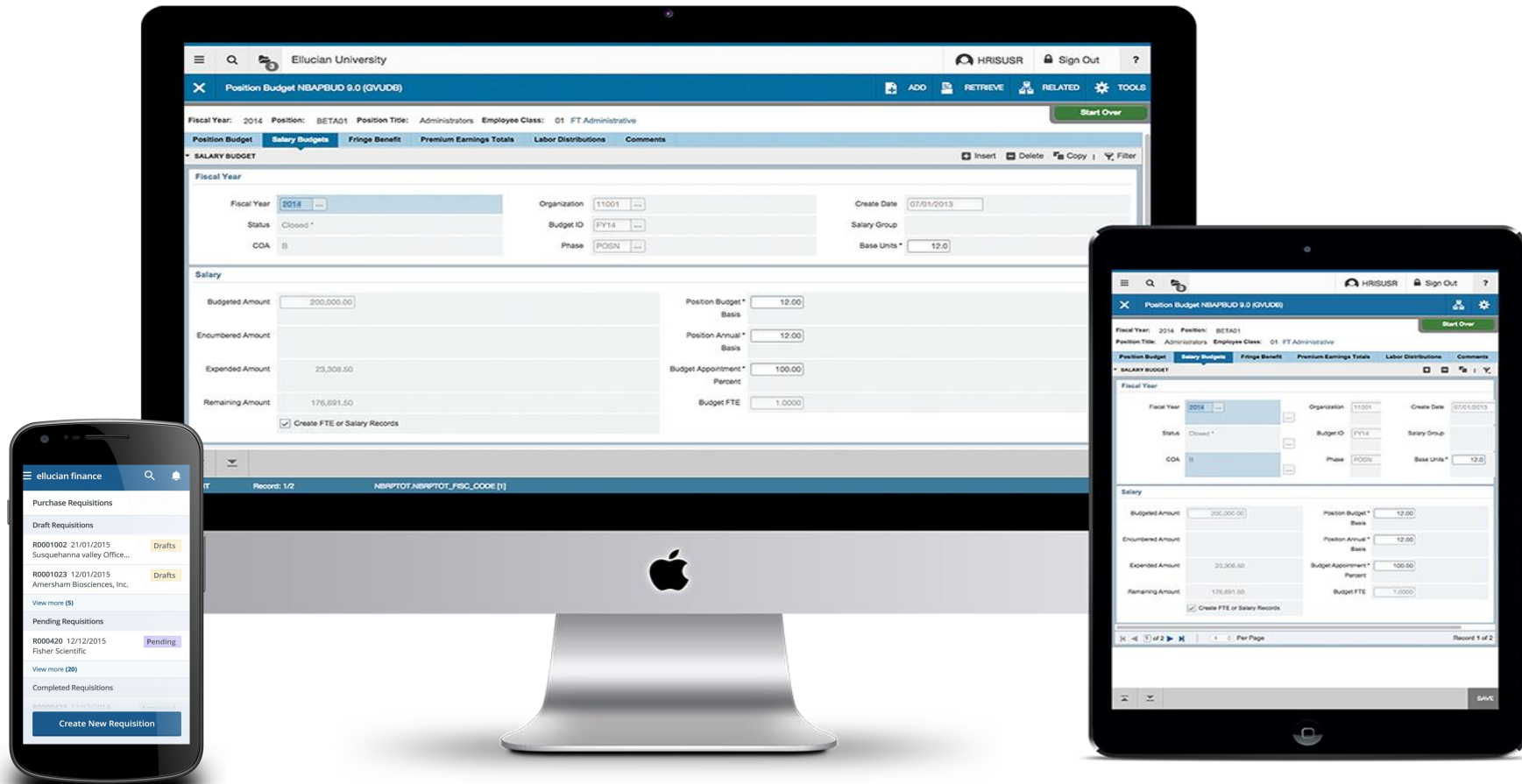
Impact to Staff

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

Stay better connected
across the institution

Drive efficiencies with
automation and process
re-engineering

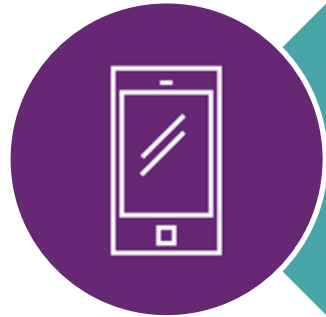
Banner 9's New Look & Feel



Tablet Friendly: Banner on-the-go

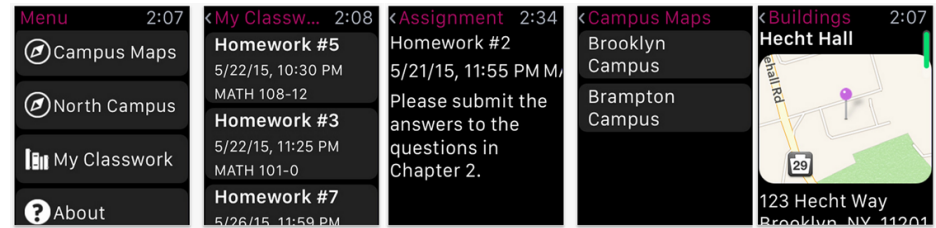


Supporting Constituents On The Go With All Devices

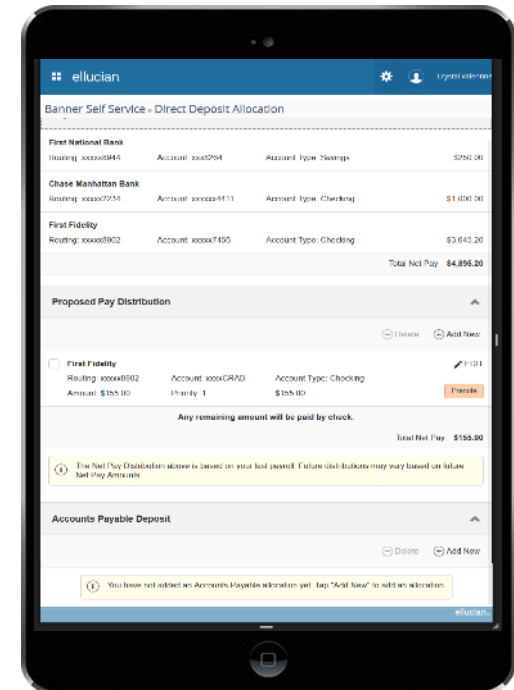


**Ellucian Solutions
Incorporate Mobility
and Web 2.0 into
administrative
systems
architecture**

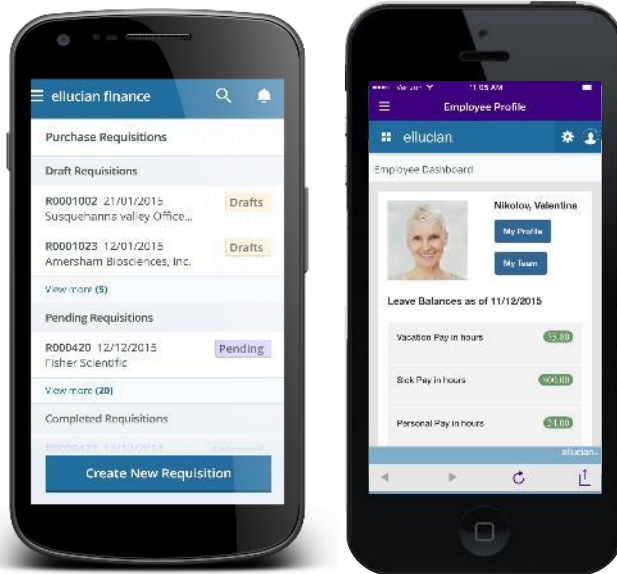
Watches



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: N00012149 Baker, Boris

Current Identification Alternate Identification Address

ID: N00012149 Name Type: ALUM Alumni ID

Person

Last Name: Baker
First Name: Boris
Middle Name:
Prefix: Mr
Suffix: Sr
Preferred First Name: Boris
Full Legal Name: Boris Baker

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: N00013510 SSN/SIN/TIN

Name Type

PERSON

Last Name: Abate Preferred First Name
First Name: Constance Full Legal Name
Middle Name
Prefix
Suffix
Marital Status: S Single

NON-PERSON

Name

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

SAVE

Enhanced User Interface

The screenshot displays the 'Position Budget NBAPBUD 8.8 (GVUDB)' interface for Ellucian University. The top navigation bar includes a search icon, a notification badge with '10', the university name, and user controls for 'PLEICHLI' (Sign Out, ?). A secondary bar contains action buttons: ADD, RETRIEVE, RELATED, TOOLS, and a green 'Start Over' button. The main content area is titled 'Position Budget' and includes tabs for 'Salary Budgets', 'Fringe Benefit', 'Premium Earnings Totals', 'Labor Distributions', and 'Comments'. The 'Salary Budget' section is active, showing fields for Fiscal Year (2014), Status (Closed *), COA (B), Organization (11001), Budget ID (FY14), Phase (POSN), Create Date (07/01/2013), Salary Group, and Base Units (12.0). Below these are financial summary fields: Budgeted Amount (200,000.00), Encumbered Amount, Expended Amount (23,308.50), and Remaining Amount (176,691.50). To the right, there are fields for Position Budget * (12.00), Position Annual * (12.00), Budget Appointment * (100.00), and Budget FTE (1.0000). A checkbox for 'Create FTE or Salary Records' is checked. At the bottom, a pagination bar shows '1 of 2' records and '1' per page. The footer includes 'EDIT', 'Record: 1/2', 'NBRPTOT.NBRPTOT_FISC_CODE [1]', and a 'SAVE' button. Annotations with purple boxes and arrows highlight the top navigation bar (labeled 'Standard tools and logout information.'), the pagination bar (labeled 'Page navigation, total number of records and table and field information; can be used on tablet or desktop'), and the bottom bar.

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

Insert Delete Copy Filter

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 *: 12.00 Basis:

Encumbered Amount: Encumbered Amount: Position Annual *: 12.00 Basis:

Expended Amount: 23,308.50 Budget Appointment *: 100.00 Percent:

Remaining Amount: 176,691.50 Budget FTE: 1.0000

☒ Create FTE or Salary Records

1 of 2 1 Per Page

Record 1 of 2

SAVE

ellucian™

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 'Personalized Banner Admin Landing Page'. At the top, there is a navigation bar with a hamburger menu icon, a search icon, and a text input field containing 'Ellucian University'. To the right of the input field are user profile icons for 'VNIKOLOV' and a 'Sign Out' button. Below the navigation bar is a large banner image of a university building. The word 'Welcome' is centered on the banner. Below the banner is a search bar with the placeholder text 'Search for forms, pages and menus...'. At the bottom of the page, there is a footer with copyright information, a release version, and keyboard shortcuts.

Ellucian University

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

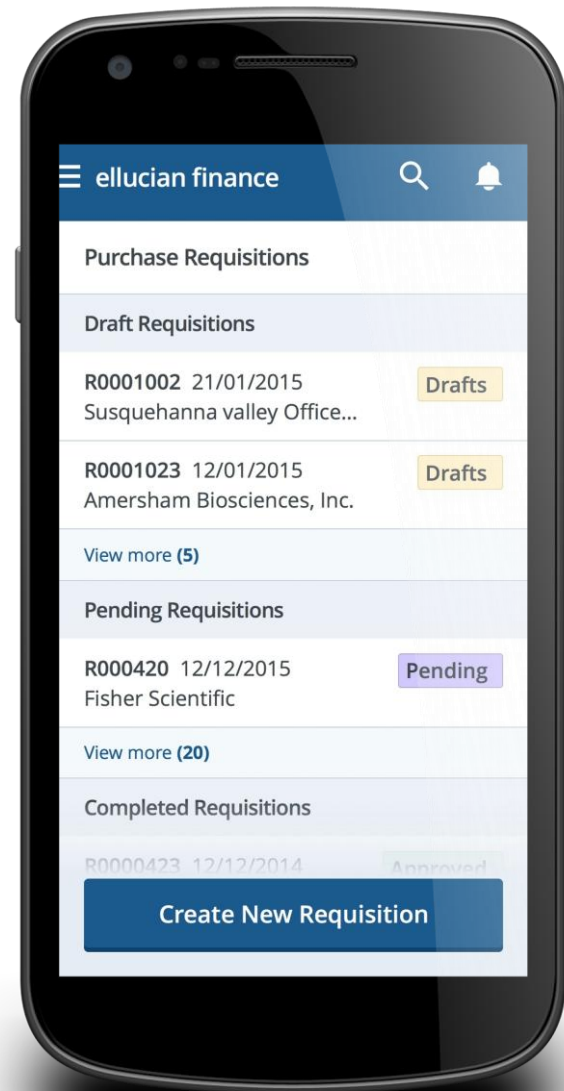
This software contains confidential and proprietary information of Ellucian and its subsidiaries. Use of this software is limited to Ellucian licensees, and is subject to the terms and conditions of one or more written license agreements between Ellucian and the licensee in question.

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




 Kristy Elliott

Purchase Requisition • Edit 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

Choose Accounting Type

☒ Document Level Accounting

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...

Requisition Summary

Save as draft

Requisition Number

R1600841

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

Commodities (1)

Air Fare (AIRFARE)735.00

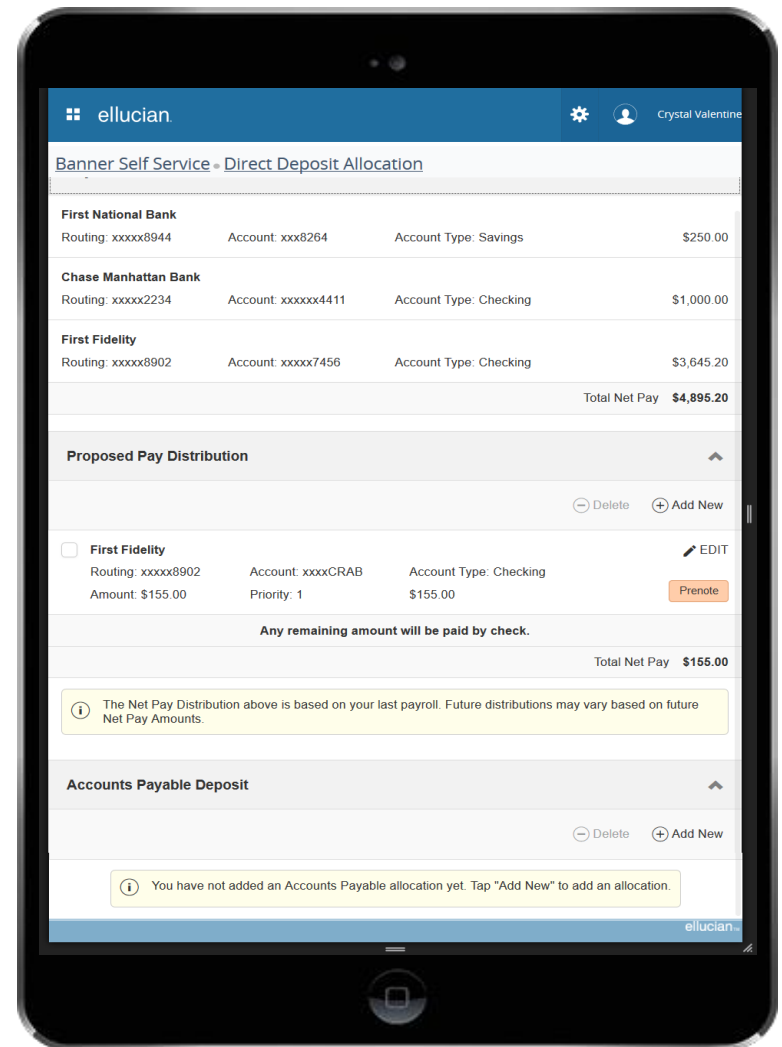
Quantity 5.00 @ 150.0000Discount 15.00

Additional Charges 0.00Tax 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

Delete
 Add New

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

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

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.

Delete
 Add New

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

Cancel Changes
Save Changes

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



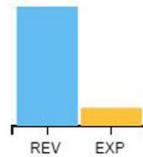
Revenue : \$1,901.00
Expense : \$1,501.00
Net : \$400.00

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

ellucian. UNIVERSITY | John Hancock | Sign Out | Notifications | Tools

Communication Management | Templates

Templates

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			
Hill- Reminder to Submit Immun Records			
Letter of Acceptance			
Math Invitation			
Missing Documentation			
Mv Template			

Communication Management • Communication Jobs

Communication Jobs

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

« < 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:

Surprisingly easy



Aims Community College talks about Banner 9



Your guide to adopting Banner 9

Learn More

- Ellucian Vision
- Moving to Banner 9
- Ellucian eCommunities Banner

Get Started

Available Applications

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 vendor.
- Add smart functionality cost-efficiently**
Get the system improvements you need more quickly and for a lower total cost of ownership.

Ellucian Live Videos


Keynote sessions

Functional sessions

Technical sessions

Keynote session

Session 99056 - What's New with Banner 9



Presenter: Kari Branjord, Ellucian, SVP Product Management


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 – 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](#)