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>Student</td>
<td>Finance &amp; HR</td>
</tr>
<tr>
<td>• Banner Student</td>
<td>• Registration</td>
<td>• Purchase Requisition</td>
</tr>
<tr>
<td>• Banner Human Resources</td>
<td>• Student Advising Profile</td>
<td>• Direct Deposit</td>
</tr>
<tr>
<td>• Banner Finance</td>
<td>• Attendance Tracking</td>
<td>• My Finance Query</td>
</tr>
<tr>
<td>• Banner Financial Aid</td>
<td>• Faculty Grade Entry</td>
<td>• Employee Profile</td>
</tr>
<tr>
<td>• Banner Student Aid</td>
<td>• Class Roster</td>
<td>• Position Description</td>
</tr>
<tr>
<td>• Banner Advancement</td>
<td></td>
<td>• Effort Reporting</td>
</tr>
<tr>
<td>• Banner Accounts Receivable</td>
<td></td>
<td>• Labor Redistribution</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Communication Management</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Personal Information</td>
</tr>
</tbody>
</table>
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

Phones

Watches

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

Add your institution name

Set your own background image

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

[Image of a digital interface for editing a purchase requisition.]

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

- **Vendor Information**
  - Chart: B Elucian Higher Education
  - Organization: 11007 Department of Mathematics

- **Add Item & Accounting**
  - Ship To Location: ART_SC H. Malthusin Ph.D.
  - Choose Accounting Type: Document Level Accounting
  - Attention To: H. Malthusin
  - Tax Group: NT No Tax

- **Requisition Summary**
  - Requisition Number: R1600841
  - Vendor: A. Daigger (ADAIG)
    - Address: 7834 Route 29, Malvern PA 19355
  - Commodities (1)
    - Item: Air Fare (AIFARE)
      - Quantity: 5.00 @ 150.0000
      - Price: 735.00
      - 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

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 the 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>Remove</td>
</tr>
</tbody>
</table>

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

[Image of the Ellucian application interface with the Direct Deposit allocation details]

[Image of the Ellucian account management interface with details]

[Image of the Ellucian payment distribution interface with details]

[Image of the Ellucian user interface with details]

16
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:momemail@test.com">momemail@test.com</a></td>
</tr>
</tbody>
</table>

- This is the campus email address.
- Email address for AOL
- This is Mom's email address.

### 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>+01425178796787</td>
<td>215 4404969</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Phone test</th>
<th>Permanent (Primary) (Unlisted)</th>
</tr>
</thead>
<tbody>
<tr>
<td>+12345678</td>
<td>+14081234567</td>
</tr>
</tbody>
</table>
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](http://www.ellucian.com/banner9guide)

See Ellucian Live videos on Banner 9
[https://banner9guide.ellucian.com/content/ellucian-live-videos](https://banner9guide.ellucian.com/content/ellucian-live-videos)

Your guide to adopting Banner 9

Use 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 their 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:

**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 it whether that includes solutions from Ellucian, an Ellucian partner, or a
- Add smart functionality cost-efficiently
- Get the system improvements you need more quickly and for a lower cost.

Ellucian Live Videos

[Available Apps](#)

**Keynote sessions**

Session 99058 - 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 a natural, user friendly experience with intuitive navigation, enhanced features and the ability to use it on all mobile devices."

[Session 99058](#)

**Functional sessions**

Session 99070 - A Functional Perspective on Implementing Banner 9

Session 97773 - Tyler Junior College Shares Strategy for Banner 9

[Session 99070](#)

[Session 97773](#)
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