The Path To Banner 9
Ellucian Software Architecture Overview
What You Need To Know About Banner 9

Banner INB
• Being replaced with modern, yet familiar, web interface using updated navigation controls; now called Banner Administrative Applications
• Ability to run in any modern browser; no client-Java required on your computer

Banner SSB “Self Service Banner”
• Remains available for a LIMITED number of Banner 8 Self Service customizations/functions

Self Service Applications “Apps”
• Functional enhancements to Banner ERP system are now delivered as “Apps”
  • Replaces MANY Banner 8 self service processes for faculty, staff, and student
    • <See Apps Slides>
## What’s Available In Banner 9 TODAY

<table>
<thead>
<tr>
<th>Administrative Applications</th>
<th>Self-Service Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banner General</td>
<td><strong>Student</strong></td>
</tr>
<tr>
<td>Banner Student</td>
<td>- Registration</td>
</tr>
<tr>
<td>Banner Human Resources</td>
<td>- Student Advising Profile</td>
</tr>
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<td>Banner Finance</td>
<td>- Attendance Tracking</td>
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<td>- Faculty Grade Entry</td>
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<td>Banner Accounts Receivable</td>
<td>- Class Roster</td>
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**Finance & HR**
- Purchase Requisition
- Direct Deposit
- My Finance Query
- Employee Profile
- Position Description
- Effort Reporting
- Labor Redistribution

**General**
- Communication Management
- Personal Information
Banner 9’s New Look & Feel
Banner 9 Administrative Applications

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.
Banner 8 SPAIDEN (HR) Form - TODAY

Old Oracle Forms
Banner 9 Web-Enabled SPAIDEN Page

New Admin Transformed Page
Choosing Self Service Functional Enhancements

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</tr>
<tr>
<td>• Banner Accounts Receivable</td>
<td>• Class Roster</td>
</tr>
<tr>
<td>COMPLETED 12/3/2018</td>
<td>Student Finance &amp; HR</td>
</tr>
<tr>
<td></td>
<td>• Purchase Requisition</td>
</tr>
<tr>
<td></td>
<td>• Direct Deposit</td>
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<td></td>
<td>• Communication Management</td>
</tr>
<tr>
<td></td>
<td>• Personal Information</td>
</tr>
</tbody>
</table>
Category: General
App Name: **Personal Information Self Service**
University Users: Staff, Faculty, Students

**New Enhancement May Require Business Process and/or Policy Change**

- Allow Faculty, Staff, Students to 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
Category: General
App Name: Personal Information Self Service
University Users: Staff, Faculty, Students
Category: Finance
App Name: Finance Query
University Users: Staff (Financial Operations)
Category: Student
App Name: Student Advising Profile
University Users: Faculty, Staff, Students

- **New Enhancement May Require Business Process and/or Policy Change**
  - Combines data from 15 different Admin screens into one
  - Advisor, Faculty and Student see the same information
  - Ability to enter Notes
  - Links to academic transcript and degree planning (**Degree Works**)  
  - Those with appropriate privileges can update hold information
Category: General
App Name: **Communication Management**
University Users: Staff (*Fin Aid, Enrollment, Registrar, Advancement, Cashiers*)

**New Enhancement May Require Business Process and/or Policy Change**

- 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
Category: Finance
App Name: **Purchase Requisition**
University Users: Staff *(Financial Operations)*
Category: HR
App Name: Direct Deposit
University Users: Staff, Faculty, Students (HR, Financial Operations)

New Enhancement May Require Business Process and/or Policy Change

• 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
Category: HR
App Name: **Direct Deposit**
University Users: Faculty, Staff, Students
Category: HR
App Name: **Employee Profile**
University Users: Staff, Faculty, Students *(HR)*

**Employee Profile – Mobile**

**New Enhancement May Require Business Process and/or Policy Change**

- Information is condensed and presented in a push instead of pull method
- Supervisor access to team information
- Enhanced usability, tablet and mobile ready
Category: HR
App Name: Employee Profile
University Users: Staff, Faculty, Students (HR)
New Enhancement May Require Business Process and/or Policy Change

A Position Description defines:

• Duties and responsibilities
• Requirements of a position

Uses include:

• Library of position descriptions
• Structured information to pass to other decision tools
• Clear data to post job openings
• Engage in for employee reviews or grievances
• Succession planning
• Reorganizations
**Category:** HR  
**App Name:** Position Description  
**University Users:** Staff *(HR)*

![Position Description](image)

<table>
<thead>
<tr>
<th>In Progress</th>
<th>Position Number</th>
<th>Position Class</th>
<th>Employee Class</th>
<th>Effective Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>-</td>
<td>-</td>
<td>02-FT Professional</td>
<td>11/30/2015</td>
<td>In Progress</td>
</tr>
<tr>
<td>2</td>
<td>-</td>
<td>-</td>
<td>02-FT Professional</td>
<td>03/11/2016</td>
<td>In Progress</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Submitted Queue</th>
<th>0</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Approvals</th>
<th>1</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Position Number</th>
<th>Position Class</th>
<th>Employee Class</th>
<th>Effective Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>C16009-Senior Secretary Math Dept</td>
<td>CFP03-Senior Secretary</td>
<td>03-FT Secretarial/Clerical</td>
<td>09/01/2015</td>
<td>Pending</td>
</tr>
</tbody>
</table>
Category: HR & Finance
App Name: Grant Effort Reporting
University Users: Faculty / Staff (HR, Financial Operations, Grant Directors)
Category: HR
App Name: Labor Redistribution
University Users: Staff (HR)
Category: Student
App Name: **Registration**
University Users: Students *(Registrar, Office of Provost, Student Life, Enrollment)*

- New Enhancement May Require Business Process and/or Policy Change
- Color coded calendar
- Course details
- Lookup and register for courses all on one screen
- Email schedule
Category: Student
App Name: Registration
University Users: Students (Registrar, Office of Provost, Student Life, Enrollment)
Category: Student
App Name: Attendance Tracking
University Users: Faculty (Registrar, Office of Provost, Student Life)

• New Enhancement May Require Business Process and/or Policy Change

• **Note: May Overlap If Blackboard Attendance Deployed**
  - Student photos displayed
  - Excel Template for tracking and uploading attendance
Category: Student
App Name: Attendance Tracking
University Users: Faculty (Registrar, Office of Provost, Student Life)
Category: Student
App Name: Faculty Grade Entry
University Users: Faculty (Registrar, Office of Provost)

• New Enhancement May Require Business Process and/or Policy Change
Category: Student
App Name: Faculty Grade Entry
University Users: Faculty (Registrar, Office of Provost)
Category: Student
App Name: Faculty Grade Entry
University Users: Faculty (Registrar, Office of Provost)

- Allow Faculty To Export Grades For External Management?
Category: Student
App Name: **Class Roster**
University Users: Faculty / Staff

### Class List

<table>
<thead>
<tr>
<th>Student Name</th>
<th>ID</th>
<th>Registration Status</th>
<th>Level</th>
<th>Credit Hours</th>
<th>Midterm</th>
<th>Final</th>
<th>Grade Detail</th>
<th>Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aers, Anthony (a.k.a.)</td>
<td>1000000</td>
<td>Registered**</td>
<td>Undergraduate</td>
<td>3</td>
<td>B</td>
<td>A</td>
<td>Available</td>
<td>Reg Year</td>
</tr>
<tr>
<td>John, Anthony (a.k.a.)</td>
<td>2000000</td>
<td>Registered**</td>
<td>Undergraduate</td>
<td>3</td>
<td>Enter Grade</td>
<td>Enter Grade</td>
<td>Available</td>
<td>Sophomore</td>
</tr>
<tr>
<td>Bartholomew, Bradley (a.k.a.)</td>
<td>3000000</td>
<td>Registered**</td>
<td>Undergraduate</td>
<td>3</td>
<td>Enter Grade</td>
<td>B</td>
<td>Available</td>
<td>Not Available</td>
</tr>
<tr>
<td>Bartholomew, Andrew (a.k.a.)</td>
<td>4000000</td>
<td>Registered**</td>
<td>Undergraduate</td>
<td>3</td>
<td>Enter Grade</td>
<td>AS</td>
<td>Available</td>
<td>Not Available</td>
</tr>
<tr>
<td>Dean, Brian (a.k.a.)</td>
<td>5000000</td>
<td>Registered**</td>
<td>Undergraduate</td>
<td>3</td>
<td>Enter Grade</td>
<td>INC-P</td>
<td>Available</td>
<td>Not Available</td>
</tr>
<tr>
<td>Creative, Associate (a.k.a.)</td>
<td>6000000</td>
<td>Registered**</td>
<td>Undergraduate</td>
<td>3</td>
<td>Enter Grade</td>
<td>Enter Grade</td>
<td>Available</td>
<td>Not Available</td>
</tr>
<tr>
<td>Garcia, Andy (a.k.a.)</td>
<td>7000000</td>
<td>Registered**</td>
<td>Undergraduate</td>
<td>3</td>
<td>Enter Grade</td>
<td>Enter Grade</td>
<td>Available</td>
<td>Not Available</td>
</tr>
<tr>
<td>Karen, Catherine (a.k.a.)</td>
<td>8000000</td>
<td>Registered**</td>
<td>Undergraduate</td>
<td>3</td>
<td>Enter Grade</td>
<td>Enter Grade</td>
<td>Available</td>
<td>Not Available</td>
</tr>
</tbody>
</table>

Enrollment Counts:
- Maximum: 15
- Actual: 15
- Remaining: 0

Wait List:
- 5
- 2
- 3

Cross List:
- 0
- 0
- 0

Summary View
The Path to Banner 9

**Technical Pre-requisites**
- ESM
- EIS
- GIT
- SSO
- DBEU
- Server Builds

**Forms Analysis/Services Plan**
- Technical upgrades
- Form conversions
- Scripting

**Install Banner 9**
- Build Sandbox PTEST – 9/17/2018
- Build Develop TEST – Dec 2018
- Build Production PROD – 12/3/18

**Socialize with Users**
- Sandbox
- Familiarization
- Communications
- Campaign
- Navigation
- Training

**Install Banner Administrative Applications**
- Finance / AR
- HR
- Student
- General
- Financial Aid
- Advancement

**Full Test**
- Connect all extensions / plug-ins / form printing / 3rd party
- UAT – User Acceptance Testing/Training

**Migrate to Production**

**GO LIVE**

**DELIVERY GOAL:** PTEST
BEGIN: 9/17/2018

**GOAL:** PTEST
WEEK OF 9/17/2018

**In Flight**

6 - 8 weeks

2 - 6 weeks

2 - 6 weeks
Banner 9 App Implementation Life Cycle

- **App Selection / Prioritization**
  - App Category
  - App Name

- **App Install DEV/TEST Environment**

- **Business Process Owner(s)**
  - Define How We Do It Today
  - Define What Changes To Use This App
  - Identify Reports and Processes To Add, Change, REMOVE

- **UAT – User Acceptance Testing/ Training**
  - Users Test New Business Processes

- **Migrate to Production GO LIVE**

*PERFORMED BY IT GOVERNANCE

PERFORMED BY IT SERVICE DELIVERY

PERFORMED BY UNIVERSITY BUSINESS PROCESS OWNER