What’s New in Banner 7.2

Human Resources & Payroll Guide
Due to the integrated nature of the various Human Resources, Finance, and Student modules in Banner and the reporting information in the Enterprise Data Warehouse (EDW), you may have access to information beyond what you need to perform your assigned duties. Your access to Banner and the EDW has been granted based on business need, and it is your responsibility to ensure the information you access is used appropriately.

Here are some reminders of good data stewardship to help you carry out your responsibility:

- Do not share your passwords or store them in an unsecured manner. Do not leave your workstation unattended while logged on to administrative information systems. You are responsible for any activity that occurs using your logon ID.
- Do not share confidential and sensitive information with anyone, including colleagues, unless there is a business reason.
- Retrieve printed reports quickly, and do not leave the reports lying around in plain view.
- Secure reports containing confidential and sensitive information (e.g., FERPA, EEO, or HIPAA protected data).
  1. Regarding FERPA, the University of Illinois maintains individual records and information about students for the purpose of providing educational, vocational, and personal services to its students. It is University policy to comply fully with federal statutes and regulations regarding the confidentiality of student educational records. As required by the Family Educational Rights and Privacy Act (FERPA) of 1974, as amended, University policy outlines procedures covering the privacy rights of students. The policy is intended to ensure the confidentiality of student education records, to establish the right of students to inspect and review their education records, and to provide guidelines for the correction of inaccurate or misleading data.
- When disposing of reports containing confidential or sensitive information, shred the documents in a timely manner.

Your responsibilities regarding the protection and security of administrative information are outlined in the University of Illinois Information Security Policy for Administrative Information and Guidelines posted at [http://www.aits.uillinois.edu/security/securestandards.html](http://www.aits.uillinois.edu/security/securestandards.html) and [http://www.aits.uillinois.edu/security/guidelines.html](http://www.aits.uillinois.edu/security/guidelines.html). Any violation could subject you to disciplinary action, which could include dismissal or, in those cases where laws have been broken, legal action. You should have signed a compliance form that indicates you have read, understand, and agree to comply with the University's Information Security Policy for Administrative Information. If you have not already signed the compliance form, please see your Unit Security Contact, who is responsible for maintaining these forms.
TABLE OF CONTENTS

Introduction and General Information ......................................................................................1
  Summary of Differences ..............................................................................................................1
  New version of JInitiator needed ...............................................................................................1

The New General Menu (GUAGMNU) .....................................................................................2
  Changes to Direct Access field .................................................................................................3

Navigation Changes ..................................................................................................................4
  Tabbed forms ..............................................................................................................................4
  Increased screen resolution means more data visible ..............................................................5
  New Icons for Banner 7 .............................................................................................................6
  Different Search icon ...............................................................................................................8
  Calendar icon added ...............................................................................................................8
  F5 function key brings up the “Go To” or direct access field in any form ....................................8
  Disabled text now black, not gray: the good and bad news .....................................................9
  Options Available with Right Mouse Click .............................................................................9

Specific Changes to HR-Pay Forms .........................................................................................10
  Changes to forms that are now tabbed ....................................................................................10
    Identification Form (PPAIDEN) .............................................................................................10
    General Information Form (PPAGENL) .................................................................................11
    Employee Form (PEAEMPL) ..................................................................................................12
    Employee Benefit / Deduction Form (PDADEDN) ...............................................................13
    Adjustment Processing Form (PHAADJT / PZAADJT) ..........................................................14
    Employee Jobs Form (NBAJOBS) ........................................................................................15
    Position Budget Form (NBAPBUD) .......................................................................................16
    Electronic Personnel Action Form (NOAEPAF) ....................................................................17
    Electronic Approval Summary Form (NOAAPSM) .............................................................18
  Changes to non-tabbed forms ..................................................................................................19
    Employee Search Form (POIIDEN) ......................................................................................19
    Employee Leave Balances (PEALEAV) ...............................................................................19
    Employee FMLA Information Form (PEAFMLA) ...............................................................19
    One-Time Payment Form (PEA1PAY) ..................................................................................19
    One-Time Payment Inquiry Form (PEI1PAY) ......................................................................19
    Certification Information Form (PPACERT) ........................................................................19
    Job Changes Detail Display Form (PEAJCDD) .....................................................................20
    Faculty Action Tracking Form (PEAFACT) ..........................................................................20
**Introduction and General Information**

Version 7.2 of Banner will be implemented at the University of Illinois on the first weekend of March, 2006. Most of the changes in Banner 7.2 for HR and Payroll are changes to navigation and the general look and feel of the system. However, there are changes to some forms, which are discussed. Note that the changes to look and feel do not apply to self-service applications of Banner. This document only focuses on changes for the HR & Payroll modules of Banner.

In this document, the changes are outline in the following sections:

1. **The New Main Menu** - discusses the changes in the Main Menu
2. **Navigation Changes** - details the changes in navigation, including new icons
3. **Changes to HR-Pay forms** - outlines changes to HR & Payroll forms. This is described in two sections. The first section discusses changes to forms that are now tabbed, and the second section details those that are not tabbed but have other changes.

**Summary of Differences**

For this release, many changes were made to improve the usability of Banner forms. All Banner forms and menus have been changed to be more streamlined and easier to use.

- Banner has a new look to help with navigating within the system
- There are now some tabbed forms to make navigating easier from block to block
- New screen resolution makes more data visible
- Icons have changed, some icons moved for better grouping while some have been removed.
- Pop up options list with right mouse click
- Added calendar icon to data entry date fields
- In many fields, the field has been expanded to allow more characters to be visible
- The block headings have been labeled more consistently than in previous versions, making it easier to determine which block s/he is working in.

**New version of JInitiator needed**

The new version of Banner (7.2) requires an updated version of Oracle Jinitiator (version 1.3.1.22). In order for end-users to experience a smooth transition to this new version, installation of the new version must occur prior to the Banner upgrade. Installation can be completed successfully ONLY by Windows users who have ADMINISTRATOR PRIVILEGES on the client workstation. Note that this change does not impact self-service use of Banner.

For more information and detailed instructions on the new version of Jinitiator, please see the web site at: [https://apps.uillinois.edu/support/jinitiator/](https://apps.uillinois.edu/support/jinitiator/).
The New General Menu (GUAGMNU)

For this release, several changes were made to enhance the main menu. The screen shot below is a representation of what the main menu will look like, but some things may be slightly different when implemented at UI.

- White background and black text
- Under “My Links” is a URL for each campus website
- “My Institution” URL is a link to www.uillinois.edu

**NOTE:** If you click on these links and the new browser window does not open, it may be because your Internet Pop-Up Blocker settings are not allowing the new browser window to open. You can test this by holding down the CTRL key on your keyboard while clicking the link. If this works, you can either:

A) Change your Pop-Up Blocker settings by accessing (in Internet Explorer) the Tools menu, Pop-Up Blocker, Pop-up Blocker Settings and adjusting your settings. **OR**

B) Keep your Pop-Up Blocker Settings as they are and hold the CTRL key each time you open the links from Banner.

“My Institution” will be a link to www.uillinois.edu website

Banner Broadcast Messages will not be used.
Changes to Direct Access field

- The “Go” field is now the “Go To…” field.

  Go:  [Input Field]  Go To… [Input Field]

- When cursor is in the Go To field on the main menu, the Up and Down arrow keys enable the user to navigate to recently-accessed forms.
Navigation Changes

Tabbed forms

Some Banner forms now have a tabbed interface rather than the traditional Banner window appearance. Tabs are used to arrange information in a meaningful way, and allow you to navigate easily between groups, or blocks, of information. You can use the Next Block and Previous Block functions, click on the tab, use the Ctrl and Tab keys, to navigate through blocks. Tab titles reflect the contents of a particular window or grouping of information. See below for an example of a form with tabs.

Use any of the following to navigate within tabbed forms:

- Control-Tab moves forward and Control-Shift-Tab moves backward through the tabs on a form.
- Control-Page Down moves forward and Control-Page Up moves backward through the tabs (this is the same as in Banner 6).
- The List Tab Pages key (F2) displays a list of other tabbed windows on the form. Use the mouse or the Up and Down arrow keys to select a different tab, and the Enter key to select that tab. For forms that have tabs within a tabbed window, navigation is based on the location of the cursor when List Tab Pages (F2) is selected.
Increased screen resolution means more data visible

Banner 6 runs in a screen resolution of 800x600, and Banner 7 utilizes more of the screen than the current version. Therefore the recommended resolution for viewing Banner is 1024x768. If you need to adjust your screen resolution, be aware that the resolution affects all viewing on your machine. Also, some older monitors may not be able to support this resolution and may require scrolling through the Banner forms.

**NOTE:** This change does not impact self-service use of Banner.

If the new Banner screen does not fit inside your Windows screen, you may need to change your screen resolution.

To change screen resolutions in any version of Windows:

1. Right-click on a blank area of your desktop, and left-click on Properties.
2. On the Properties dialog box, click on the Settings tab.
3. In the Screen Resolution area towards the bottom left, drag the slider to 1024 by 768 pixels setting.
4. Click OK. It sometimes takes a minute for the settings to adjust, so do not be concerned if it pauses before adjusting.

If you need to change the screen resolution to another setting, repeat these steps.

**New Icons for Banner 7**

Banner 7 has a different layout of icons on the toolbar. Most icons have changed their picture; some icons have been moved for better grouping; some icons have been removed. In addition, there are some new icons. Below is a picture of the new toolbar.
## Icon Crosswalk from 6 to 7

<table>
<thead>
<tr>
<th>7</th>
<th>Action</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td></td>
<td>Save</td>
</tr>
<tr>
<td>Rollback</td>
<td></td>
<td>Rollback</td>
</tr>
<tr>
<td>Select [SHIFT+F3]</td>
<td></td>
<td>Select</td>
</tr>
<tr>
<td>Insert Record</td>
<td></td>
<td>Insert Record</td>
</tr>
<tr>
<td>Delete Record</td>
<td></td>
<td>Delete Record</td>
</tr>
<tr>
<td>Enter Query [F7]</td>
<td></td>
<td>Enter Query</td>
</tr>
<tr>
<td>Execute Query [F8]</td>
<td></td>
<td>Execute Query</td>
</tr>
<tr>
<td>Cancel Query [CTRL+Q]</td>
<td></td>
<td>Cancel Query</td>
</tr>
<tr>
<td>Previous Record</td>
<td></td>
<td>Previous Record</td>
</tr>
<tr>
<td>Next Record</td>
<td></td>
<td>Next Record</td>
</tr>
<tr>
<td>Previous Block [CTRL+PG UP]</td>
<td></td>
<td>Previous Block</td>
</tr>
<tr>
<td>Next Block [CTRL+PG DN]</td>
<td></td>
<td>Next Block</td>
</tr>
<tr>
<td>View/Send Message</td>
<td></td>
<td>View/Send Message</td>
</tr>
<tr>
<td>Print</td>
<td></td>
<td>Print</td>
</tr>
<tr>
<td>Graph</td>
<td></td>
<td>Graph</td>
</tr>
<tr>
<td>Banner Extender Solutions (BXS)</td>
<td></td>
<td>BXS – Add a Document</td>
</tr>
<tr>
<td>BXS – Add a Document</td>
<td></td>
<td>BXS – Add a Document</td>
</tr>
<tr>
<td>Open Electronic Document</td>
<td></td>
<td>Open Electronic Document</td>
</tr>
<tr>
<td>Workflow Submit</td>
<td></td>
<td>Workflow Submit</td>
</tr>
<tr>
<td>Workflow Release</td>
<td></td>
<td>Workflow Release</td>
</tr>
<tr>
<td>Show Keys [CTRL+F1]</td>
<td></td>
<td>Show Keys</td>
</tr>
<tr>
<td>Bookshelf</td>
<td></td>
<td>Bookshelf</td>
</tr>
<tr>
<td>Online Help</td>
<td></td>
<td>Online Help</td>
</tr>
<tr>
<td>Exit [CTRL+Q]</td>
<td></td>
<td>Exit</td>
</tr>
</tbody>
</table>
Different Search icon

- The magnifying glass icon (shown left) in version 6 is a down arrow (shown right) in 7.

Calendar icon added

This is the same calendar you receive in Banner 6 when double clicking inside a date field. Now with the calendar icon displayed, it is more obvious that a calendar is available.

<table>
<thead>
<tr>
<th>Service Dates</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Hire:</td>
<td>06-DEC-2001</td>
</tr>
<tr>
<td>Original Hire:</td>
<td>06-DEC-2001</td>
</tr>
<tr>
<td>Adjusted Service:</td>
<td>06-DEC-2001</td>
</tr>
<tr>
<td>Seniority:</td>
<td>06-DEC-2001</td>
</tr>
<tr>
<td>First Work Date:</td>
<td>06-DEC-2001</td>
</tr>
</tbody>
</table>

F5 function key brings up the “Go To” or direct access field in any form

The F5 function key automatically brings up the “Go To” or direct access field in any form. In the screen shot below, when in PEAEMPL looking at Carol Burnett’s record, “F5” was pressed. The “Go To” field pops up on top of PEAEMPL.

**WARNING**: The form you open via direct access opens on top of the form you had open previously. Please use caution when using this functionality, as having too many forms open can result in Oracle errors.

Also, notice the “My Institution” link – it also appears automatically. This will be www.uillinois.edu when implemented at the University of Illinois.
Disabled text now black, not gray: the good and bad news

Disabled text is now black (the same as regular text), making it easier to read. However, it is more difficult to visually discern if a field is updatable because the text is the same color.

Options Available with Right Mouse Click

The right mouse button now provides added functionality in Banner 7. Available options can now be accessed by right-clicking on a form from anywhere on the blank canvas (not from a field).

This list contains Rollback, Save, Exit, Print, and Add to Personal Menu (meaning you can add ANY form to your custom My Banner menu with a single click) as well as any form-specific options, both within the form (moving to blocks) or opening up a new form.

In the example to the right, you can see (highlighted in the red box) a portion of the options menu that pops up on NBAJOBS.
Specific Changes to HR-Pay Forms

These changes are outlined in two sections: the first discusses changes to forms that are now tabbed, that is, they now have tabs to navigate from block to block. The second section outlines changes to forms that are not tabbed, but information has been renamed or moved. Your access to these forms is based upon your security: you may not have access to all of these forms.

Changes to forms that are now tabbed

Identification Form (PPAIDEN)

Commonly used to view:
- SSN / UIN
- Addresses
- Emergency Contact
- Email

This form now has tabs, and they are:
- Current Identification
- Alternate Identification
- Address
- Telephone
- Biographical
- E-mail
- Emergency Contact

Other changes in PPAIDEN
1. The Legal Name window and the ID/Name Maintenance Information window have been eliminated. This information is now included in the Current Identification window.
General Information Form (PPAGENL)
Commonly used to view:
- Publications
- Honors & Awards
- Drivers License

This form now has tabs, and they are:
- General Education
- Examinations
- Publications
- Driver’s License
- Honors and Awards
- Transcript

Other changes
In the General Education window, the blocks have been renamed - more accurately to represent the details:
- Institution
- Diploma or Degree
- Area of Concentration
**Employee Form (PEAEMPL)**

Used to find general information about an employee using UIN or Name.

This form now has tabs, and they are:

- General Employee
- United States Regulatory (formerly the “Regulatory” window)
- Canadian Regulatory (formerly the “Other Regulatory” window)

**Other Changes**

1. Hiring Location window, Leave of Absence window and the Termination window have been eliminated from PEAEMPL and the fields have been relocated to the General Employee window

2. Regulatory window has been renamed United States Regulatory and the Other Regulatory window has been renamed Canadian Regulatory.

---

**Termination now here**

**Hiring Location now here**

**Leave of Absence now here**
Employee Benefit / Deduction Form (PDADEDN)

This is a form used by the Benefits office only.

This form now has tabs, and they are:

- Deduction
- Add or Replace and Arrears
- Excluded Payroll ID
- Premium History

Other Changes

1. The One-Time Add/Replace Information window has been eliminated and the relevant fields are now included in the Add or Replace block of PDADEDN.

2. The Arrear Information window has been removed and the relevant fields have been relocated to the Arrears block of PDADEDN.
**Adjustment Processing Form (PHAADJT / PZAADJT)**

These forms are used to process payroll adjustments. PHAADJT is used by Payroll, PZAADJT is used by departments / units.

This form now has tabs, and they are:

- Adjustment Detail
- Job Information
- Document Information (Not visible on PZAADJT)
- Comments

**Other Changes**

1. More fields available to view in the *Document Information* window without scrolling
2. All fields able to be seen in the *Job Information* window
Employee Jobs Form (NBAJOBS)

Commonly used to view information about an employee’s job.

This form now has tabs, and they are:

- General Job (default)
- Job Detail
- Payroll Default
- Deferred Pay
- Miscellaneous
- Excluded Deductions/ Benefits
- Default Earnings
- Work Schedules
- Job Labor Distribution

Other Changes

1. All fields now visible in the Default Earnings and Job Labor Distribution window without scrolling
Position Budget Form (NBAPBUD)

Used to:

- View Position budget, salary budget and position labor distributions
- Enter salary changes

This form now has tabs, and they are:

- Position Budget (Default)
- Salary Budgets
- Fringe Benefit
- Premium Earnings
- Totals
- Labor Distributions
- Comments

Other Changes

1. All fields visible in the Labor Distributions window without scrolling
Electronic Personnel Action Form (NOAEPAF)

This form is used to process:

- Graduate reappointments
- Labor distribution changes
- Time entry method changes

This form now has tabs, and they are:

- Transaction (Default)
- Job Labor Distribution
- Default Earnings
- Routing
- Comments and Other Information

Other Changes

1. Additional rows added to the Transaction window and the Routing window.

2. All fields visible in the Labor Distributions window without scrolling

3. The Comments and Other PAF Information windows have been combined into one window, the Comments and Other Information window
Electronic Approval Summary Form (NOAAPSM)

This form now has tabs, and they are:

- Transaction Information
- Transaction Comments

Other Changes

1. More fields visible in the Transaction window without scrolling
## Changes to non-tabbed forms

<table>
<thead>
<tr>
<th>Form</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee Search Form (POIIDEN)</strong></td>
<td>All fields visible in the Main window without scrolling</td>
</tr>
<tr>
<td>Used to search for an employee – especially helpful when you do not know UIN.</td>
<td></td>
</tr>
<tr>
<td><strong>Employee Leave Balances (PEALEAV)</strong></td>
<td>Shows only 2 jobs in the block in stead of 3 jobs to select from.</td>
</tr>
<tr>
<td>Used to view leave balances for an employee.</td>
<td></td>
</tr>
<tr>
<td><strong>Employee FMLA Information Form (PEAFMLA)</strong></td>
<td>One POSSIBLE change is that the Other FMLA Leave Information window MAY be removed, and those fields will be relocated to the Main window of the form. However, at the UI, we have a modified form and this might not be possible due to space limitations. Thus, it may remain the same as today (as a separate block).</td>
</tr>
<tr>
<td>Used to track FMLA Leaves of Absence in Banner.</td>
<td></td>
</tr>
</tbody>
</table>
| **One-Time Payment Form (PEA1PAY)** | The blocks in the Main window have been renamed:  
  - Biographic and Demographic  
  - Address and Telephone  
| The *Job Information* block in the Job Information window has been renamed as the *Jobs* block. |
| Used to process a one time payment. |
| **One-Time Payment Inquiry Form (PEI1PAY)** | In the Main window, the following fields have been relocated to outside of the horizontal scroll area:  
  - Birth Month and Day  
  - Payroll Date  
  - Citizenship |
| Used to query a one time payment. |
| **Certification Information Form (PPACERT)** | In the Main window, the following three fields have been relocated to outside of the horizontal scroll area:  
  - Certification Date  
  - Next Certification Date  
  - Expire Date |
| Used to view Certification / License / Endorsement information. |
### What's New in Banner 7.2 – HR & Payroll

<table>
<thead>
<tr>
<th>Form</th>
<th>Change</th>
</tr>
</thead>
</table>
| **Job Changes Detail Display Form (PEAJCDD)** | The blocks in the Main window have been renamed:  
  - Job  
  - Compensation  
  All fields in the Compensation block visible without scrolling |
| Used by Central HR.           |                                                                        |
| **Faculty Action Tracking Form (PEAFACT)** | The blocks within the Appt/Tenure Records Action window have been renamed:  
  - Appointment  
  - Tenure  
  The blocks within the Rank Action window have been renamed:  
  - Rank  
  - Decision  
  All fields in the Faculty Leaves Action window are now grouped under the Leave Data block |
| Used by the Provost’s office to track faculty. |                                                                        |
| **Faculty Action Inquiry Form (PEIFACT)** | The blocks in the Main window have been renamed as:  
  - Appointment and Tenure  
  - Faculty Leave  
  - Rank |
| **HR Staff & Organization Development** |                                                                        |
| HR Administration             |                                                                        |
| [https://hrnet.uir.uiuoilinois.edu/dart-cf/training/index.cfm](https://hrnet.uir.uiuoilinois.edu/dart-cf/training/index.cfm) | Department email: hrsd@uillinois.edu |