

Banner 8.x Miscellaneous Enhancements

Presented by: Pam Leichliter & Charlie Westfall, SunGard Higher Education April 12, 2010 Session ID 1219

Session Rules of Etiquette

- Please turn off your cell phone/pager
- If you must leave the session early, please do so as discreetly as possible
- Please avoid side conversation during the session

Thank you for your cooperation!

Session ID 1219 2

Introduction and Content

- Summary of Important Features
 - ➤ Voluntary Uncommitted Cost Sharing for Effort Reporting
 - > Changes to Effort Reporting and Labor Redistribution
 - > Display of new Person fields, for international clients
 - > Miscellaneous Enhancements
 - > Employee Self Service Enhancements
 - > Work in Progress



Voluntary Uncommitted Cost Share for Effort Reporting and Labor Redistribution

Adobe Flex module for Research Institutions

Voluntary Uncommitted Cost Share Enhancement – 8.2

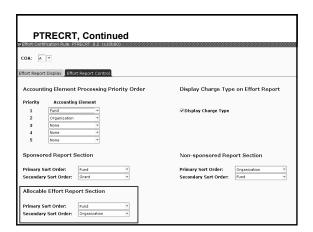
- · Overall Goal
 - Provide a method to collect and certify effort above and beyond the commitments of the grant contract
 - Does not require a labor redistribution, but effort must be captured in the effort report
 - Requires the certifier to allocate effort to the proper category, or category group prior to certification

Session ID 1219 5

PTRECRT - Effort Certification Rules

- · New fields for:
 - —Allocation Statement, which displays in the Allocate Effort pop-up window of the Flex application
 - Primary and Secondary sort orders for the Allocable Section of the Effort Report
 - Acceptable values are "Fund" or "Organization"





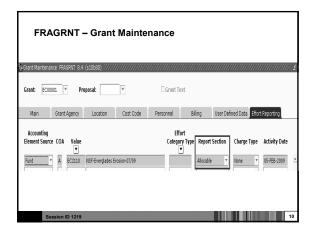
FRAGRNT - Grant Maintenance

- New value "Allocable" added to Report Section on Effort Reporting Tab
 - When the Allocable value is selected, the Category and Charge Type fields are not populated, and the user may not update those fields
 - —If a Fund is used, where the "Fund Requires Effort Allocation" checkbox is marked, the value of Allocable is automatically populated, and the Category and Charge Type are non data enterable
 - —The FOAPAL components with a value of "Allocable" are reported in the Allocable Section of the Effort Report

Session ID 1219

9

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ERLR Flex Application Changes

- Modify the Report to display the Allocable Section
- · Provide a button for the certifier to access the Allocate Effort Page
- · Provide a button for the Allocated Effort to be viewed after allocation and certification
- Provide a pop-up page for the certifier to Allocate Effort
- Provide the ability for the post-review to return the effort report for correction
- Provide the ability to print the Allocable Section, in different formats: prior to allocation, and after allocation



Redistribution Changes

Additional Changes to ERLR

- New fields on NTRINST to control how email is sent from the ERLR Flex application (RPE suggested by VA Tech)
 - -Email Type to be used for Effort Certification
 - —Email Type to be used for Labor Redistribution
- Provide the "Add New Funding" in the printed copy of the effort report.

- · Removal of numeric stepper on all numeric fields
- · Support of Last Name Prefix field exposure

Summary

- Provide support for Uncommitted Cost Share Reporting
- · Provide support for Institutional Email type
- Provide Support for Last Name Prefix
- Removal of numeric stepper on all numeric fields in the ERLR application

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Display of New Person Fields for International Clients

Delivered to the Database in Banner 8.0 and exposed in Banner 8.2

New Person Fields

Provide visibility of the person fields delivered in Banner 8.0:

- -Last Name Prefix
- —House Number
- -Address Line 4
- —Telephone Country Code

Session ID 1219

17

New Person Fields, continued

- Application Specific Masking rules and SSB masking rules
 - —GORDMSK delivered with fields Masked, so they do not display.

 —GORDMCL
- · f_format_name function
 - Provides consistent name formatting, using the masking
 - Multiple objects, including forms, packages, views, API's, and Object Access views

New Person Fields, continued

- · Banner forms
 - —21 total some or all of the new fields are supported for display or data entry
- · Banner processes
 - —phpchek and phpchkl only, to support Last Name Prefix, House Number, and Address Line 4
- Employee Self-Service
- Effort Reporting and Labor Redistribution

Session ID 121

19



Miscellaneous Enhancements

Miscellaneous Enhancements - 8.0

- Electronic Personnel Actions (EPAF)
 - Banner support for personnel actions involving multiple jobs to provide support for Termination of one job and appointment of another.
- Data Block Tabs added to forms
 - —Position Requisition (PAAPREQ)
 - Benefit Category Rule (PTRBCAT)
 - -Position Description (PAAPDES)
 - Employee FMLA Leave (PEAFMLA)
 - $-- {\sf Employee\ Class\ Rule\ (PTRECLS)}$
 - -Position Definition (NBAPOSN)
 - —Fringe Chargeback Rule (NTRFBLD)

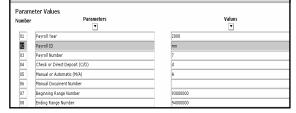
Miscellaneous Enhancements - 8.1

- De-support of Faculty Form PEAFACD (SIBFACD)
- · Miscellaneous Security Enhancements

Miscellaneous Enhancements – 8.2

- Duplicate Check Number Prevention
 - —The Long Check process (PHPCHKL) and the Short Check process (PHPCHEK), have been updated to provide a 1-up document number.

- -Verifies the assigned number is not a duplicate.
- —Warning message added for checks on Adjustment form.

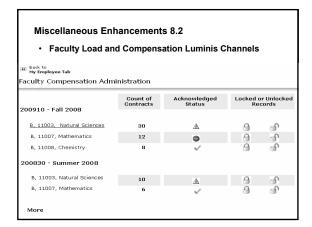


Miscellaneous Enhancements - 8.2

Enhanced Sorting of Leave History Records

—Descending by Effective Date and Time





Miscellaneous Enhancements - 8.2

- · Support Three Decimals for Life Insurance Tax Rates
 - —The entry of three digits to the right of the decimal on PTRGTAX is now possible.
 - —This will allow institutions to halve the rates so that they can include the imputed income twice monthly, without encountering fluctuating net pay.
 - Note that this change does not incorporate rules to define the rates by Payroll ID. Therefore, if the institution has a combination of payroll frequencies, such as monthly and semi-monthly, this change will not assist in fluctuating pay for semi-monthly or biweekly employees. (RPE 1-2AZ8XN)

Miscellaneous Enhancements - 8.2

 U.S. Veteran's Employment Reporting Data Capture Updates (8.2.1 Release delivered VETS-100/100A Report)



Miscellaneous Enhancements - 8.2

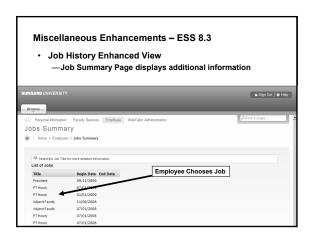
- New Option to replace SSN on the Direct Deposit
 file
 - —A new parameter on PHPDIRD replaces SSN with Banner ID for employee privacy. (RPEs 1-X4FTP & 35296)
- Single EPAF Transaction Processing with NOPEAMA
 - A new parameter will be added to the Mass Apply Process (NOPEAMA) to allow a user to run the process for a single EPAF transaction number. (RPE 1-52X7Q3)

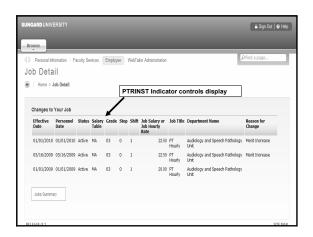
Miscellaneous Enhancements - 8.2

- · Legal Name added to EPAF
 - SSN Legal Name information from PEAEMPL added for maintenance on the EPAF
 - —On Banner Forms and Self Service

Miscellaneous Enhancements - ESS 8.2

- Web Time Entry 8.2 (Session 1220, Wednesday 10:00am)
 - —Display of Employee Leave Balance for Approver
 - —Change of Sort Order for Time Sheet Periods
 - —Limit Approver Time Sheet View by Date
 - -Clock In/Out Functionality
- Web Time Entry 8.3
 - $-{\sf Recall/Resubmit\ Time\ Sheet}$
 - —All Department Option for Approver View
- Self Service 8.3 New Style Sheet for Self Service





Mis	scellaneous Enhancements – 8.3
	Earnings by Position Page (New) — Employee selects Year(s) and Position(s) — Page displays Jobs, Earn Codes, Hours, and Pay
years to allo All to summ	allows you to filter which Earnings and Positions will be summarized in order to display a summary of your gross pay and hours. First, select one or more own the system to determine which Positions were paid. Then, press the 6-th buffor to relative the Positions for the selected years. For Positions, choose- native Earning for all Positions that were paid, or make ene or more selections from the Position list. To select multiple letters within a list, use the Crit white making you selection. These the Summaria youtbut at the bottom of the page to believe your information when you filter selection is complete.
Years:	2003 A 60 2003 T
Positions:	A0005-00, Provod I/P Academic Affairs A AD0008-0, Adjunct Faculty CDIW444-00, Adjunct Faculty



Regulatory Round-up (Session 1218, Wednesday 10:45am)

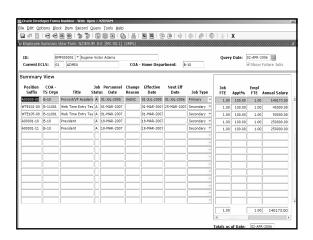
- International (IAT) Transactions for Direct Deposits
- VETS-100/100A Reporting Changes
- FMLA Regulatory Updates (Care for Military)
- Race/Ethnicity Changes for IPEDS Winter Collection
- Race/Ethnicity Changes for Fall Staff Survey

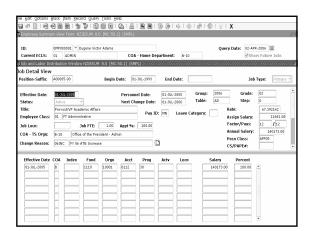
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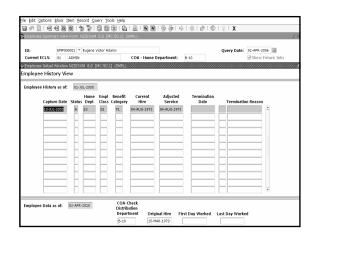
- FOAPAL Verification Process
 - -New process to detect Terminating FOAPAL strings

- Evaluates Job Labor, Position Funding, or current Payroll records
- —Produces a report for user analysis and correction
- Extension of 12/24 Hour Time to Web Time Entry
 - —PTRINST specifies 12/24 Hour Time display
 - Rules and other Banner forms have been enabled with entry and display (i.e. PTRCALN)
 - —Time In/Out and Clock In/Out pages will be enabled









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Questions & Answers

Thank You!

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Session ID 1219 43