

Banner 8.x Miscellaneous Enhancements

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Session ID 1219

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- 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!

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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

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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

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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”

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PTRECRT – Effort Certification Rules

Effort Certification Rule PTRECRT 8-2 (s10B80)

COA: A

Effort Report Display

Effort Report Control

Graduate Student Certification:

☐ Optional

☐ No Signature Required

☒ Required

Certification Statement:

I hereby certify that the effort presented on this report is true and accurate, and the rules are for Chart A.

Allocation Statement:

Please allocate effort as required.

PTRECRT, Continued

Effort Certification Rule PTRECRT 8-2 (s10B80)

COA: A

Effort Report Display

Effort Report Control

Accounting Element Processing Priority Order

Display Charge Type on Effort Report

Priority

Accounting Element

1

Fund

2

Organization

3

None

4

None

5

None

☒ Display Charge Type

Sponsored Report Section

Non-sponsored Report Section

Primary Sort Order: Fund

Secondary Sort Order: Grant

Primary Sort Order: Organization

Secondary Sort Order: Fund

Allocable Effort Report Section

Primary Sort Order: Fund

Secondary Sort Order: 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

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FRAGRNT – Grant Maintenance

Grant Maintenance: FRAGRNT 8.4 (s10b80)

Grant: Proposal: ☐ Grant Text


Main Grant Agency Location Cost Code Personnel Billing User Defined Data **Effort Reporting**

Accounting Element Source	COA	Value	Effort Category Type	Report Section	Charge Type	Activity Date
Fund	A	EC2110 NSF-Everglades Erosion-07/09		Allocable	None	05-FEB-2009

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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**



Other Effort Reporting and Labor 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

NTRINST – Position Control Institutional Rules

Position Control Installation Rules NTRINST 9.2 (s10680)

Base Rules | **Electronic Approval** | Salary Planner

Location:

Insert Job Detail Data Between Existing Records: ☐ Not Allowed ☒ Allowed

Probationary Period Units: ☒ Days ☐ Month

Time Entry Rules

Time Entry Approval Category: Time Entry

Leave Report Approval Category: Leave Time Entry

☒ Return Time or Leave Sheet to Employee on Web for Correction

Effort Certification Rules

☐ Proxy Assumes Superuser Capabilities

E-mail Type: Business Email

Effort Certification Web Service

URL:

Password:

Finance Rules

COA:

Validate Position Budget:

Maximum Document Sequence Number:

☒ Create NHRDIST Records

☒ Encumbrance Recasting Indicator

☒ Feed Future Encumbrance to Finance


Labor Redistribution Rules

☐ Proxy Assumes Superuser Capabilities

E-mail Type: Business Email

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



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

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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 rules
 - Multiple objects, including forms, packages, views, API's, and Object Access views

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New Person Fields, continued

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

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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)
 - Employee Class Rule (PTRECLS)
 - Position Definition (NBAPOSN)
 - Fringe Chargeback Rule (NTRFBLD)

Miscellaneous Enhancements - 8.1

- De-support of Faculty Form PEAACD (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.

Parameter Values	
Number	Values
01	Payroll Year
02	Payroll ID
03	Payroll Number
04	Check or Direct Deposit (C/D)
05	Manual or Automatic (M/A)
06	Manual Document Number
07	Beginning Range Number
08	Ending Range Number

Miscellaneous Enhancements - 8.2

- Enhanced Sorting of Leave History Records
 - Descending by Effective Date and Time

Employee Leave History - PELHIS 8.2 (810580)

ID: 555666555 Position: Mr. Austin David West

Employee Leave History

Leave Code: VACA Vacation Pay Effective Date: 17-AUG-2009 07:16:15 Hours Banked: .00 Available On: 01-JAN-2002 User ID: MPISHER Change Reason: PHPUPDT program updated hours accrued, taken and banked.

Leave Code: SICK Sick Pay Effective Date: 17-AUG-2009 07:16:43 Hours Banked: .00 Available On: 01-JAN-2002 User ID: MPISHER Change Reason: PHPUPDT program updated hours accrued, taken and banked.

Miscellaneous Enhancements 8.2

- Faculty Load and Compensation Luminis Channels

[Back to my Employee Tab](#)

Faculty Compensation Administration

	Count of Contracts	Acknowledged Status	Locked or Unlocked Records
200910 - Fall 2008			
B, 11003, Natural Sciences	30		
B, 11007, Mathematics	12		
B, 11008, Chemistry	8		
200830 - Summer 2008			
B, 11003, Natural Sciences	10		
B, 11007, Mathematics	6		

[More](#)

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)

Identification: PPAIDEN 8.2 (s10680) [Help](#)

ID: Generate ID:

Gender: ☒ Male ☐ Female ☐ Not Available
 Birth Date:
 Age:
 SSN/SIN/TIN: Deceased Date:

Citizenship: ☒ Citizen ☐ Non-Citizen
 Marital Status: ☒ Married ☐ Single ☐ Divorced ☐ Widowed
 Religion:
 Legacy:
 Ethnicity:
 New Ethnicity:

Veteran File Number:
 Veteran Category:
 Active Duty Separation Date:

☒ Armed Forces Service Medal Indicator
☒ Special Disabled Veteran

Confirmed Date:
 User:
 Activity Date:

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**

—Recall/Resubmit Time Sheet

—All Department Option for Approver View

- **Self Service 8.3 – New Style Sheet for Self Service**

Miscellaneous Enhancements – ESS 8.3

- **Job History Enhanced View**
—Job Summary Page displays additional information

SUNGARD UNIVERSITY

Personal Information | Faculty Services | **Employee** | WebTutor Administration

Find a page...

Home > Employee > Jobs Summary

Select the Job Title for more detailed information

Title	Begin Date	End Date
President	09/11/2009	
PT Hourly	07/01/2009	
PT Hourly	01/01/2009	
Adjunct Faculty	11/06/2008	
Adjunct Faculty	07/01/2008	
PT Hourly	07/01/2008	
PT Hourly	07/01/2008	

Employee Chooses Job

SUNGARD UNIVERSITY

Personal Information | Faculty Services | **Employee** | WebTutor Administration

Find a page...

Home > Job Detail

Changes to Your Job

Effective Date	Personnel Date	Status	Salary Table	Grade	Step	Shift	Job Salary or Job Hourly Rate	Job Title	Department Name	Reason for Change
01/01/2010	01/01/2010	Active	MA	03	0	1	22.50 PT Hourly	Audiology and Speech Pathology Unit		Ment Increase
05/16/2009	05/16/2009	Active	MA	03	0	1	22.50 PT Hourly	Audiology and Speech Pathology Unit		Ment Increase
01/01/2009	01/01/2009	Active	MA	03	0	1	20.00 PT Hourly	Audiology and Speech Pathology Unit		

Jobs Summary

RELEASED: 8.1

CTR: 8845

PTRINST Indicator controls display

Miscellaneous Enhancements – 8.3

- **Earnings by Position Page (New)**
—Employee selects Year(s) and Position(s)
—Page displays Jobs, Earn Codes, Hours, and Pay

This page 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 years to allow the system to determine which Positions were paid. Then, press the Go button to retrieve the Positions for the selected years. For Positions, choose All to summarize Earnings for all Positions that were paid, or make one or more selections from the Position list. To select multiple items within a list, use the Ctrl or Shift key while making your selection. Press the Summary button at the bottom of the page to retrieve your information when your filter selection is complete.

Years: 2009 2008 2007 Go

Positions: A00005-00, Provost/VP Academic Affairs AD0008-0, Adjunct Faculty CDW444-00, Adjunct Faculty

Summary

[illegible]

File Edit Options Block Item Record Query Tools Help

EMPLOYEE SUMMARY VIEW FORM NZBESUM 6.0 (MC-SO-1) (GMP)

ID:	EMP000001 Eugene Victor Adams	Query Date:	02-Apr-2006
Current ECLS:	01 ADOS05	COA - Home Department:	B-10
	<input type="checkbox"/> Show Future Jobs		

Faculty Information View

Position Suffix:	AAD005-09	Title:	Private/VP Academic Affairs	Status:	Active
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Appointment Information

Appointment Effective Date:

Appointment Begin Date:

Appointment End Date:

☐ Terminal Appointment

Review Type:

Next Review Date:

Faculty Leave Information

Leave Begin Date:

Leave End Date:

Leave Type:

☐ Sabbatical

Sabbatical Type:

Next Eligibility Type:

Next Eligibility Date:

Tenure Information

Tenure Effective Date:

Tenure Code:

Tenure Status:

Tenure Review Year:

Tenure Review Type:

Tenure FTE:

Rank Information

Rank Effective Date:

☐ Emeritus

Rank:

Next Review Date:

[illegible]

Questions & Answers

Thank You!

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Please complete the online class evaluation form

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