Banner Human Resources Overview Training Workbook

April 2007

Release 7.1

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Human Resources Overview

Lesson: Overview

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Workbook goal

The goal of this workbook is to provide you with an overview of the Banner Human Resources module processes, menus, and terminology. Separate workbooks detailing the topics found within the Human Resources module are available. The workbooks contain detailed information about the forms and processes required for set up and day-to-day operations.

Intended audience

Human Resources office administrators and staff and anyone who needs a general overview of the processes covered in the Banner 7 Human Resources module.

Objectives

At the end of this workbook, you will be able to:

- identify the features and functions of the Human Resources system
- identify and describe the primary forms in the Human Resources system
- describe some of the additional services provided by the Human Resources system.

Prerequisites

To complete this workbook, you should have completed the SunGard Higher Education computer-based training (CBT) tutorial "Banner 7 Fundamentals," or have equivalent experience navigating in the Banner system.

Human Resources Overview

Lesson: The Human Resources Process

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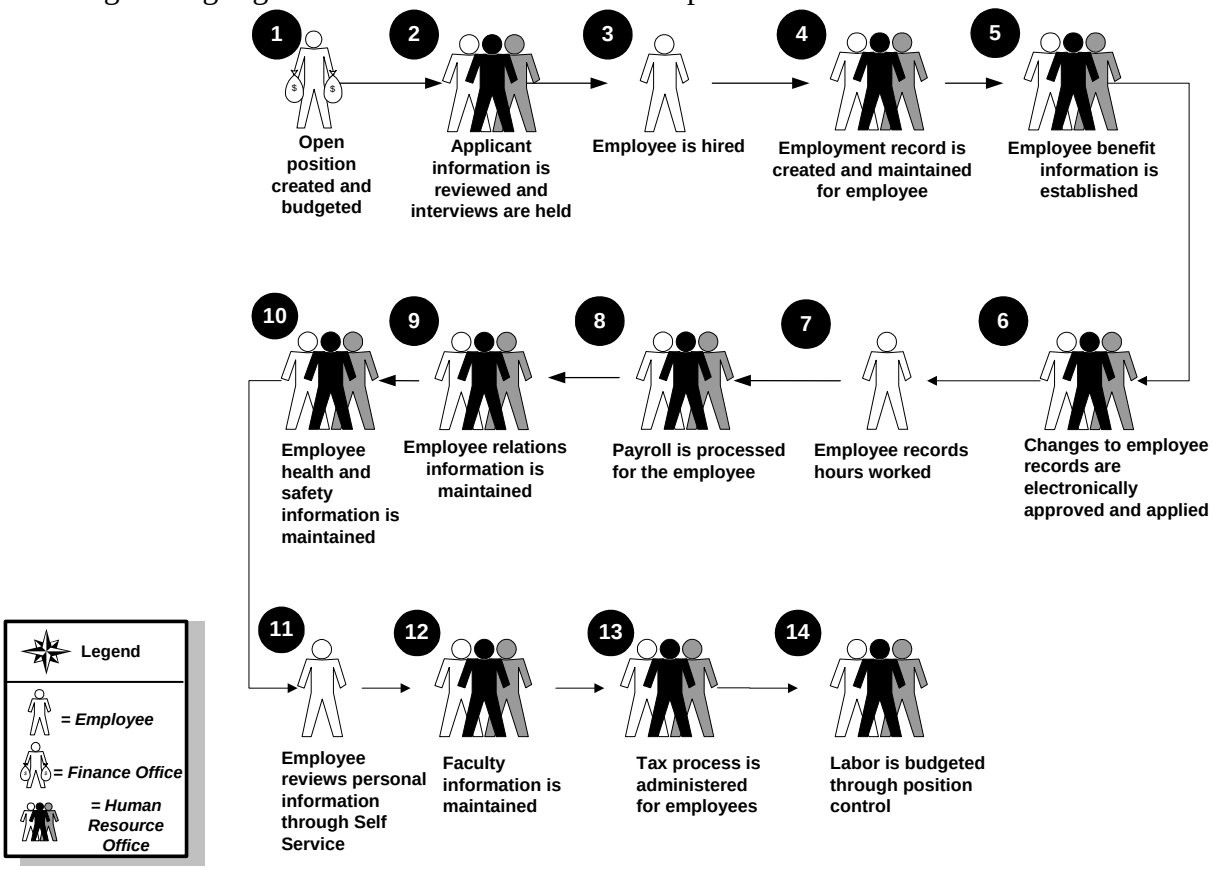
Introduction

The Banner Human Resource process begins with the creation of a new position at the institution and follows through the employment hiring process and creating and maintaining the employee records.

Flow diagram

This diagram highlights the overall Human Resource process.



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What happens?

This table identifies the people, institutions, and systems that play a role in the Human Resource process.

Stage	Description
1	The position is defined via the Position Control module, which classifies it as active, cancelled, or frozen.
2	Vacancy and recruiting data can be specified in a requisition and viewed by position number, requisition number, or applicant name. When an applicant is hired, an employee file is created. The new file shares the applicant's information. Leave eligibility is defined, and leave balances and performance information are maintained. Biographic and demographic information is updated as necessary.
3	Biographic and demographic data is collected and made available for applicant and employee records. Information on education, employment history, examinations results, publications, skills, and certification is added to the applicant's file. Interview results and comments can also be included.
4	Position and employee information combine to define a job record. The employee's work history is recorded in the Employee History form. Leaves are established and leave records are maintained.
5	Tax rules, life and medical insurance, retirement plan, and other employee benefits are defined and maintained. Associated payroll deductions are established.
6	Employee, job, leave, and deduction information is relayed to Payroll.
7	Employee records hours worked.
8	Payroll's time entry function supports online entry of positive and exception hours. It proofs and validates earnings codes, hours, and special rates, and it generates rosters and time documents. This data is used to calculate gross and net pay. Payroll adjustments (for example, redistributions, manual checks, one-time payments, and check cancellations) are made as necessary and online totals are maintained for fiscal and calendar years for all jobs, deductions, and employees.
9	Employee relations records are maintained. Records may include bargaining unit associations, labor contracts, grievance incidents.
10	Employee health and safety information is maintained.
11	Employee reviews personal information through the web.
12	Faculty information is maintained.
13	Tax process is administered for employees.
14	Labor is budgeted through position control.

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Human Resources Overview

Lesson: The Human Resources Process (Continued)

Jump to TOC

Interfaces

Interface to the Banner Finance System

The Human Resources System interfaces with the Finance System through Position Budgeting, Payroll transactions, Wage and Salary Adjustments and COBRA transactions.

Interface to the Banner Advancement System

The interface between Human Resources and the Banner Advancement System allows deductions from the Human Resources payroll module to become gift/installment payments in Banner Advancement. The interface occurs two ways:

- Banner Advancement feeds pledge information to Banner Human Resources to create a deduction
- Banner Human Resources feeds the deductions back in order to create the gift/installment payment records

Integration with the Banner Student System

The points of integration of the Banner Human Resources System with the Banner Student System include shared data in the General Person and Faculty Load modules. For example, data from the HR Faculty Information Form is shared with the Student Faculty Personnel Form. The Banner Human Resource System also uses data from the Banner Student System to determine the Student Employee FICA Status.

Integration with the Banner Financial Aid System

The points of integration of the Banner Human Resources System with the Banner Financial Aid System include shared data in the payroll history tables, I-9 data on the employee record, and processes that Financial Aid must perform to give a financial aid job to the students. The interface provides an update to the Workstudy Award to show total hours worked and dollars earned.

Data Standards

Prior to implementing Banner Human Resources, it's important that your institution develop standards for the entry of data. For example, the use of Post Office boxes when entering your addresses – use "P.O. Box" or "PO Box". You'll need to also consider the use of capitalization and punctuation. As in any computerized system, it is imperative to be consistent in how you enter your data because it may affect the outcome of your queries and reports.

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Human Resources Overview

Lesson: Human Resources System Menu

Jump to TOC

Introduction

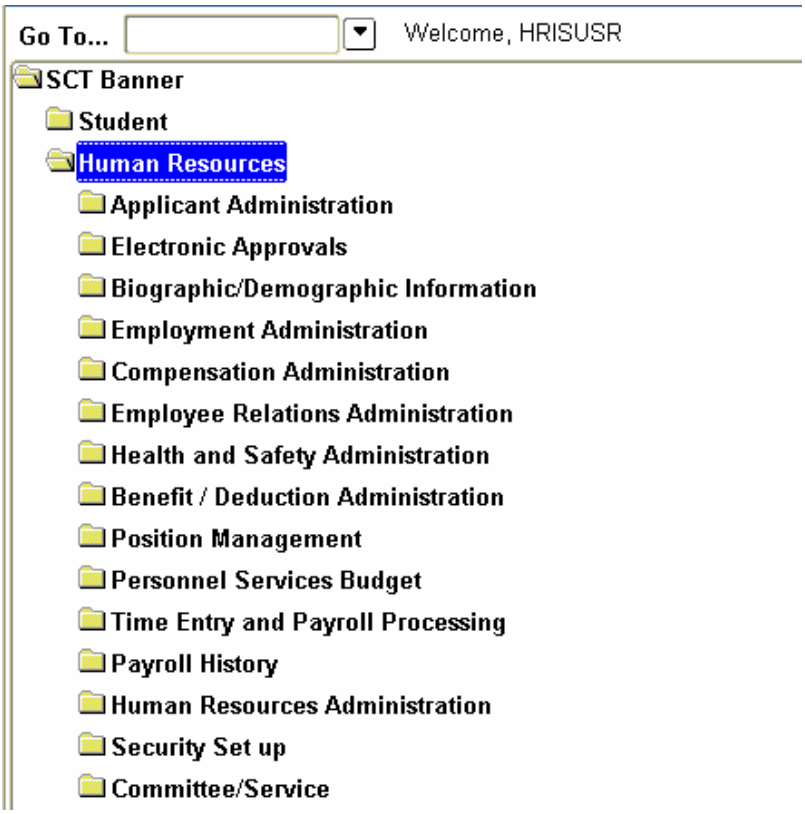
You can use the Banner Human Resources main menu to select from a list of the menus, forms, jobs, and QuickFlows. The main menu shows the various levels of menus and submenus available at your institution. Menus are nested in folders. You can easily navigate through Banner by expanding these menus. Personal menus can be tailored to individual needs.

Screen image

From the Banner main menu, select the Human Resources module.

Screen image, continued

The main menu structure displays the topics that make up the Human Resources module.



Human Resources Overview

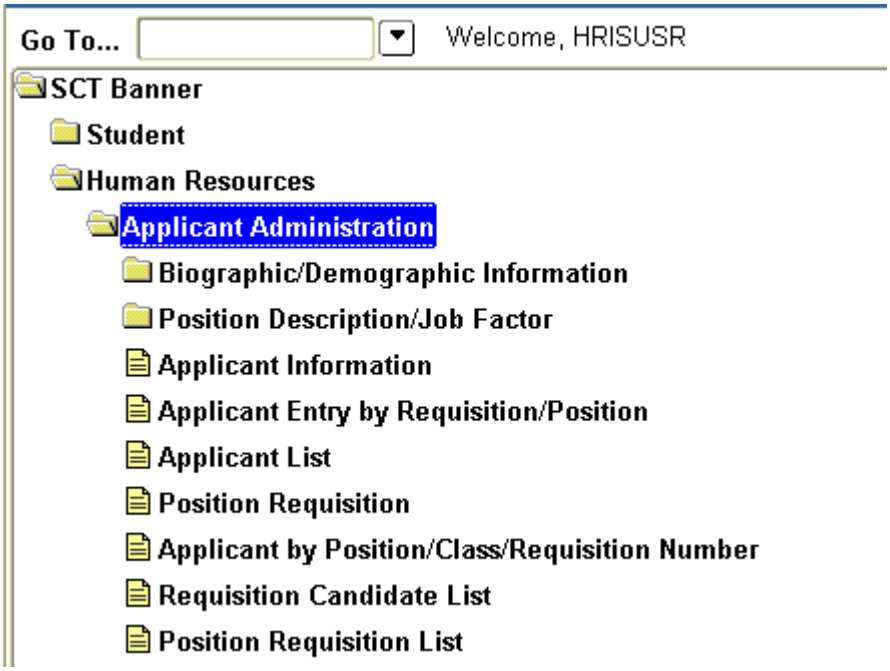
Lesson: Applicant Administration Menu

Jump to TOC

Introduction

The Applicant Administration module creates and maintains records on applicants for existing positions.

Menu



Primary forms

Position Requisition Form (PAAREQU)

- used to create position requisitions and capture requisition, approval, and recruiting data for vacant positions.

Applicant Information Form (PAAAPPL)

- used to create records for new applicants and to modify existing applicant records.

Human Resources Overview

Lesson: Electronic Approvals Menu

Jump to TOC

Introduction

The Electronic Approvals module is designed to accommodate a more efficient approval process for centralized and decentralized Human Resource operations.

The forms and reports were developed to:

- enter the action for approval
- define the necessary approval hierarchy
- track items through the approval process
- provide an audit trail of all approval/disapproval history.

Benefits

Users can track their items requiring approval through an online form. Approvers can easily view items that need approval and add their own comments to an action.

Design

The design of the Electronic Approvals functionality with Banner Human Resources is based on the current routing of a paper Personnel Action Form (PAF). Electronic Approvals allows you to create and route the PAF electronically. The design of the Electronic Personnel Action Form is rule based, which enables each site to customize an online PAF. The originator completes the Electronic Personnel Action Form and initiates routing through the defined approval queue, which can be set up for consecutive or sequential approvals. Once the form passes through the defined approval queue, the Electronic Personnel Action Form is applied to the database.

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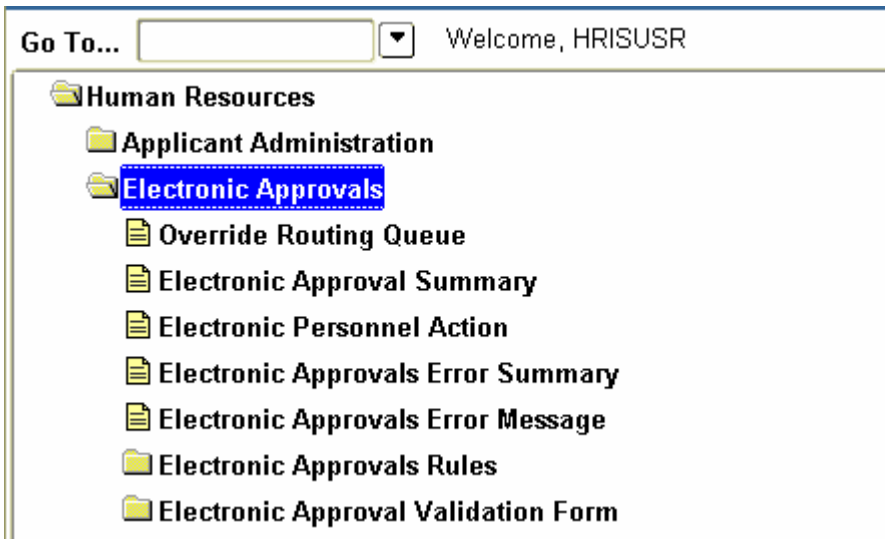
Human Resources Overview

Lesson: Electronic Approvals Menu (Continued)

Jump to TOC

Menu



Primary forms

Electronic Approval Summary Form (NOAAPSM)

- enables approvers to view minimal information about an Electronic Approvals transaction for which they are required to take action

Electronic Personnel Action Form (NOAEPAF)

- provides your institution with an electronic version of the Personnel Action Form.

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Human Resources Overview

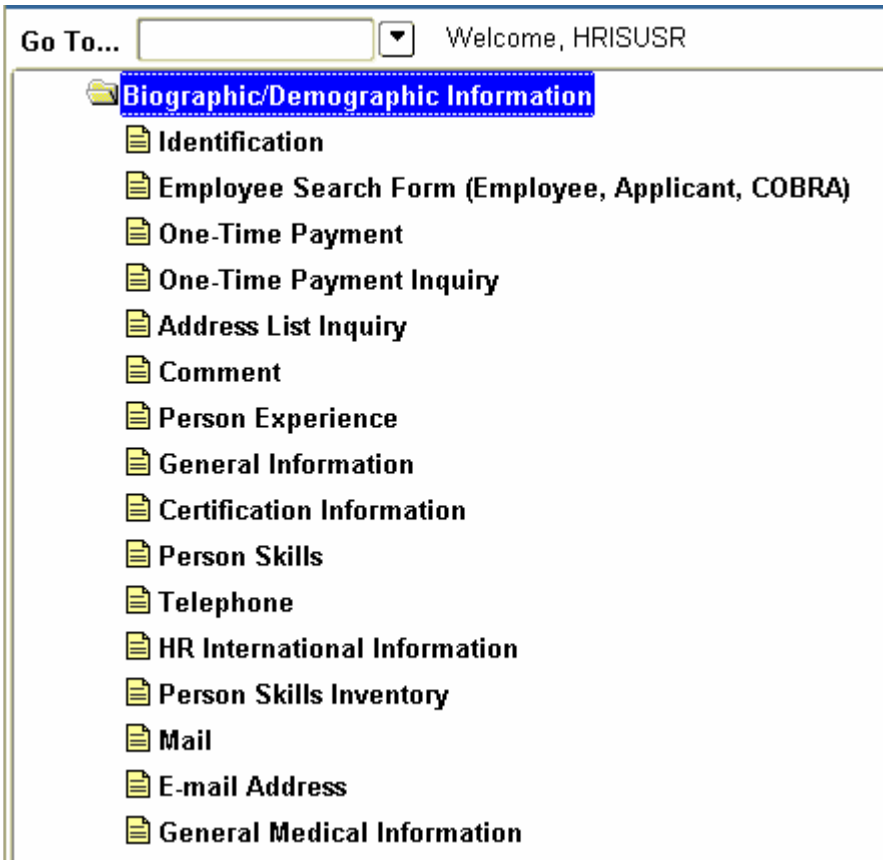
Lesson: Biographic/Demographic Information Menu

Jump to TOC

Introduction

The core of the Biographic and Demographic Information module is the Identification Form (PPAIDEN), which establishes a unique ID number for each individual in the system. Use this form to enter basic biographic information about an applicant or employee.

Menu



Primary form

Identification Form (PPAIDEN)

- enables the entry of basic biographic/demographic data about anyone associated with the institution – directly or indirectly.

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Human Resources Overview

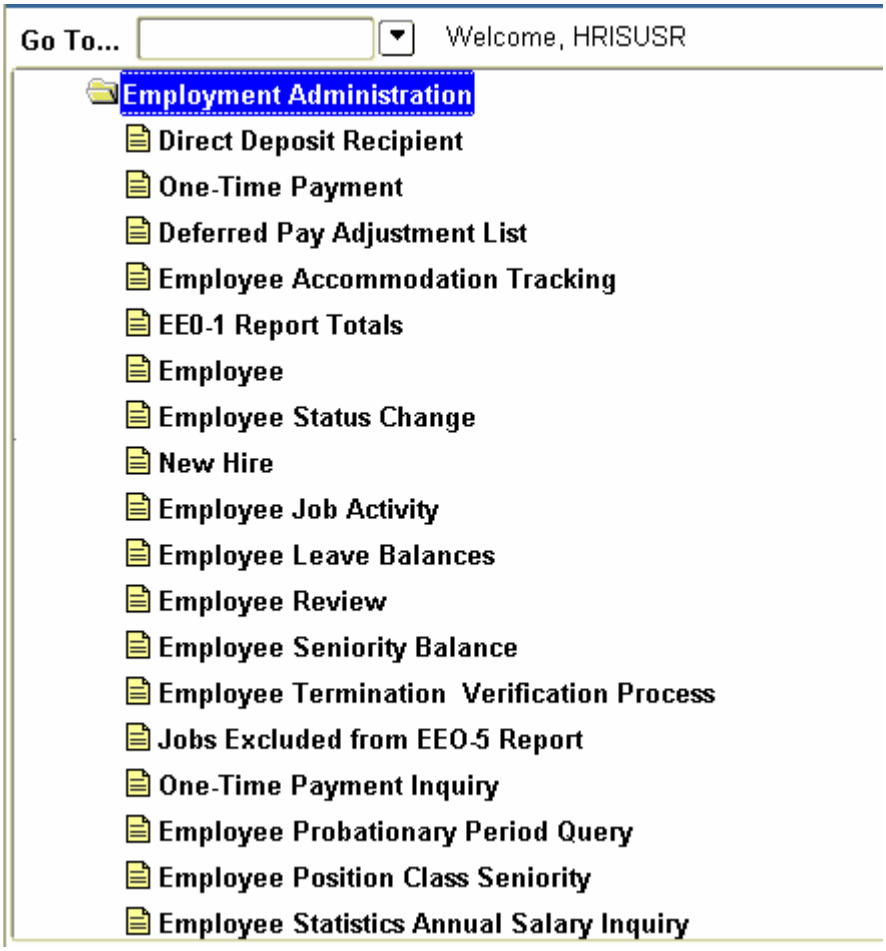
Lesson: Employment Administration Menu

Jump to TOC

Introduction

The Employment Administration module supports the entering and reporting of employee information.

Menu



Note: You will need to scroll to see all the forms and files available on the Employment Administration menu.

Primary form

Employee Form (PEAEMPL)

- establishes employee information, including data on status, service dates, leave and benefit categories, leaves, and terminations.

Human Resources Overview

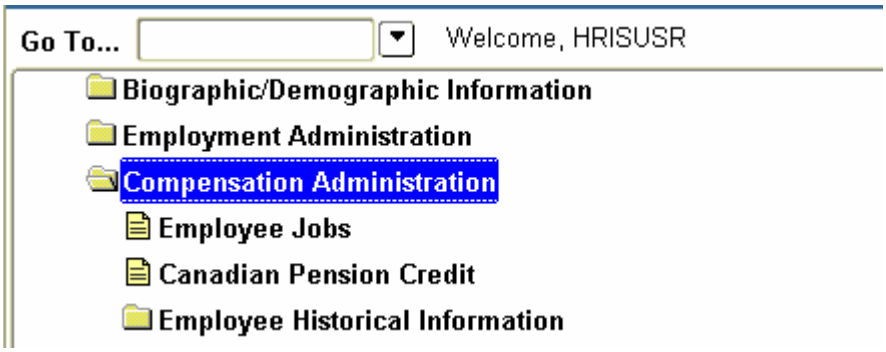
Lesson: Compensation Administration Menu

Jump to TOC

Introduction

The Compensation Administration module supports compensation information for an employee.

Menu



Primary forms

Employee Jobs Form (NBAJOBS)

- establishes a job assignment by matching an employee with a position. Maintains information on a job as defined for a specified employee, including position, job title, start and end dates, status, hours, and salary information. Allows future-dated changes to be entered for job information.

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Human Resources Overview

Lesson: Employee Relations Administration Menu

Jump to TOC

Introduction

The Employee Relations module enables you to create and maintain labor-related information. It supports the following features:

- bargaining unit membership,
- multiple bargaining unit relationship tracking,
- seniority tracking, and
- grievance tracking.

Menu

Primary forms

Employee/Job Labor Relations Form (PEABARG)

- collects and displays information on an employee's bargaining units and the jobs with which they are associated.

Employee Relations Grievance Form (PEAGREV)

- collects data on employee grievances.

Human Resources Overview

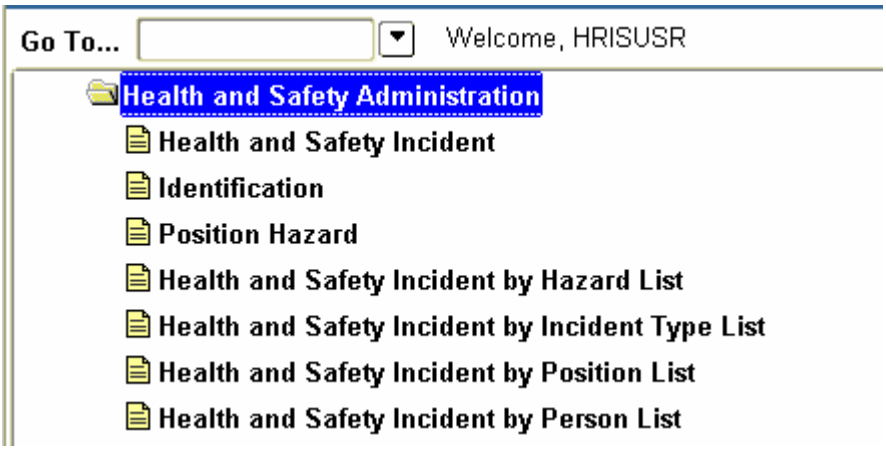
Lesson: Health and Safety Administration Menu

Jump to TOC

Introduction

The Health and Safety Administration module supports the entry and reporting of employee health information. It enables you to satisfy Occupational Safety and Health Act requirements by maintaining job-related health and safety data.

Menu



Primary forms

Health and Safety Incident Form (PEAHSIN)

- maintains information on health and safety related incidents.

Position Hazard Form (PEAPNHZ)

- allows you to associate known hazardous materials, activities, or locations, with a specified position.

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Human Resources Overview

Lesson: Benefit/Deductions Administration Menu

Jump to TOC

Introduction

The Benefit/Deduction Administration module offers four benefit capabilities.

Benefit	Description
Benefit definition	Provides for an unlimited number of benefits and benefit plans using a variety of calculation methods and flexible rule structures.
Eligibility administration	Enables you to control the benefit programs in which an employee may participate. Banner Human Resources eligibility administration functions can group the benefits into an unlimited number of benefit/deduction categories, and allows you to set up eligibility for those programs and cross bargaining unit, organizational, and functional boundaries, if needed.
Flexible benefit administration	Enables you to allow employees to design creative benefit packages that meet their individual needs while staying within cost guidelines.
COBRA administration	Automates the vast majority of COBRA calculations, correspondences, and billing transactions.

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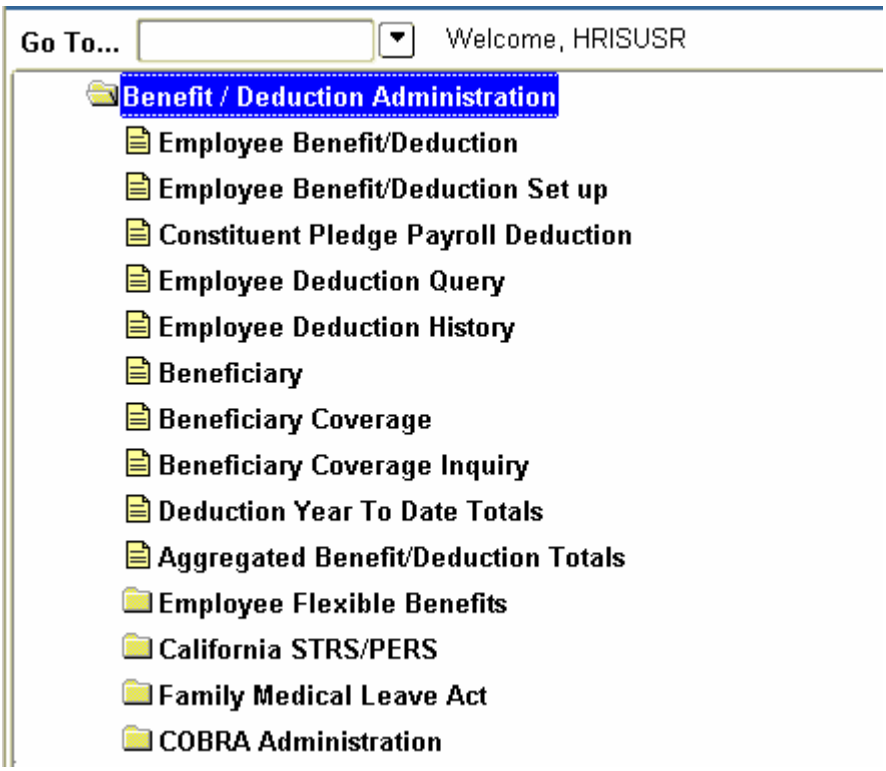
Human Resources Overview

Lesson: Benefit/Deductions Administration Menu (Continued)

Jump to TOC

Menu



Primary forms

Employee Benefit/Deduction Form (PDADEDN)

- used to assign and maintain deductions for benefits, taxes, and employee-specified withholding for individual employees. Allows future-dated plan changes.

Employee Benefit/Deduction Setup Form (PDABDSU)

- enables an experienced user to quickly perform an employee's *initial* deduction setup.

Beneficiary Form (PDABENE)

- captures information on the beneficiaries and dependents of employees for administrative purposes.

Beneficiary Coverage Form (PDABCOV)

- allows for the viewing, adding, and deleting of dependents and beneficiaries by employee for each benefit.

Human Resources Overview

Lesson: Position Management Menu

Jump to TOC

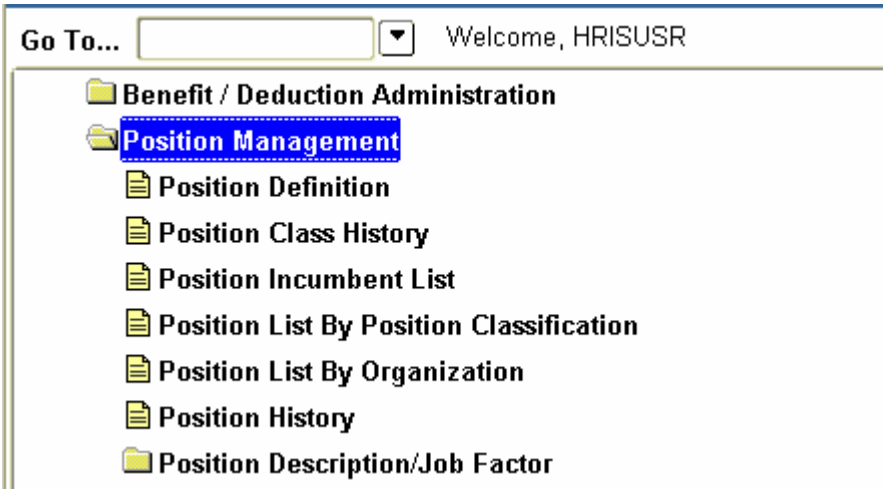
Introduction

The Position Management module supports both Position Control and Position Budgeting.

Position Control: Enables you to define job families, positions, and position characteristics, job descriptions, and minimum qualifications.

Position Budgeting: Allows you to define and monitor salary, premium earnings, and fringe benefits budgets. Several methods and "what-if" scenarios for position budgeting are supported.

Menu



Primary forms

Position Definition Form (NBAPOSN)

- enables you to define all positions.

Position Budget Form (NBAPBUD)

- enables the definition of position budgets by fiscal year, regular earnings totals, premium earnings totals, fringe benefits, and position labor distributions. Used to activate and fund positions created in NBAPOSN.

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Human Resources Overview

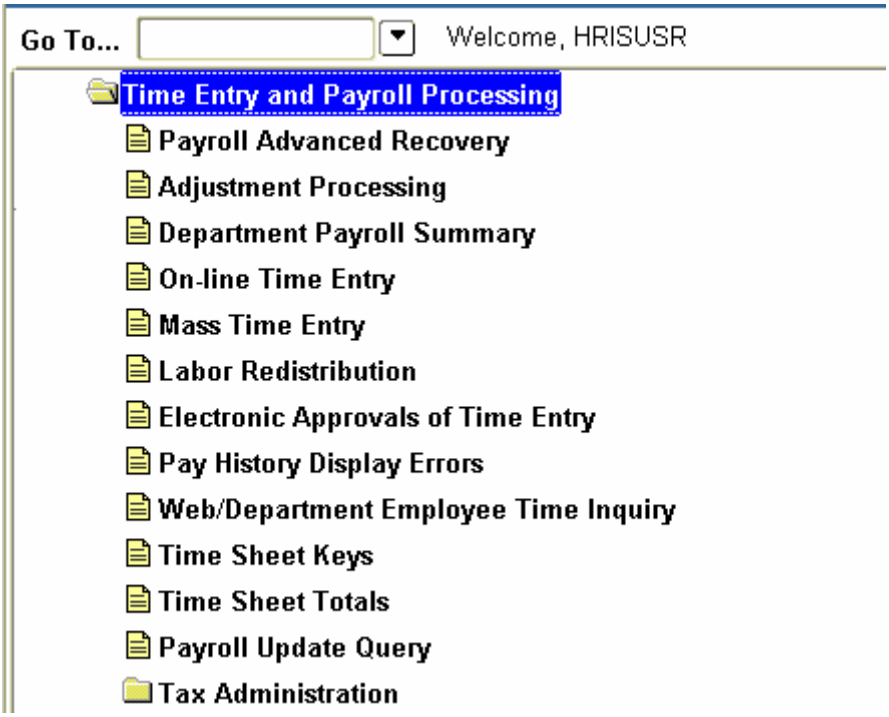
Lesson: Time Entry and Payroll Processing Menu

Jump to TOC

Introduction

The Time Entry and Payroll Processing module collects time sheet data, calculates and generates paychecks, and maintains pay history data.

Menu



Primary forms

Online Time Entry Form (PHAHOUR)

- enables the payroll office to enter hours an employee works in a specified pay period. Captures regular hours that are defaulted from the job record which then requires only data entry of exception time as well as allowing for manual entry of positive hours worked.

Mass Time Entry Form (PHAMTIM)

- enables the entry or display of hours for a number of employees. This is typically used in conjunction with web or third party time entry systems.

Human Resources Overview

Lesson: Additional Services

Jump to TOC

Faculty Administration

The Faculty Administration module allows the institution to establish tenure history for a faculty member, collect multiple rank statuses on faculty members and record information on faculty leaves.

Employee Self Service

Employee Self Service is a tool that enables the employees of an institution to access specific records through a secured portal that is validated by a User ID and Password. The types and levels of access given to employees can be customized to better serve the needs of individual campus communities.

Employees can view and/or make changes to their records from home or from the office on a 24/7 basis thus reducing the need for Human Resources professionals to assist or intervene in every payroll and benefits/deductions inquiry or change.

Self Service Time Entry

The Employee Self Service and Banner Human Resources systems work together allowing employees to report and submit their time transactions (time sheets or leave requests) directly from the Web to the Banner HR system.

After a time transaction is submitted to the system, it can go through an electronic approval process. During the approval process, the employee may view the approval status of the time transaction or any changes made to that transaction by approvers. After the time transaction is approved, it is interfaced to the on-line time entry form where it continues through the normal payroll process. This functionality results in efficient administration of both the time entry process and overall payroll processing procedures.

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Human Resources Overview

Lesson: QuickFlows

Jump to TOC

Description

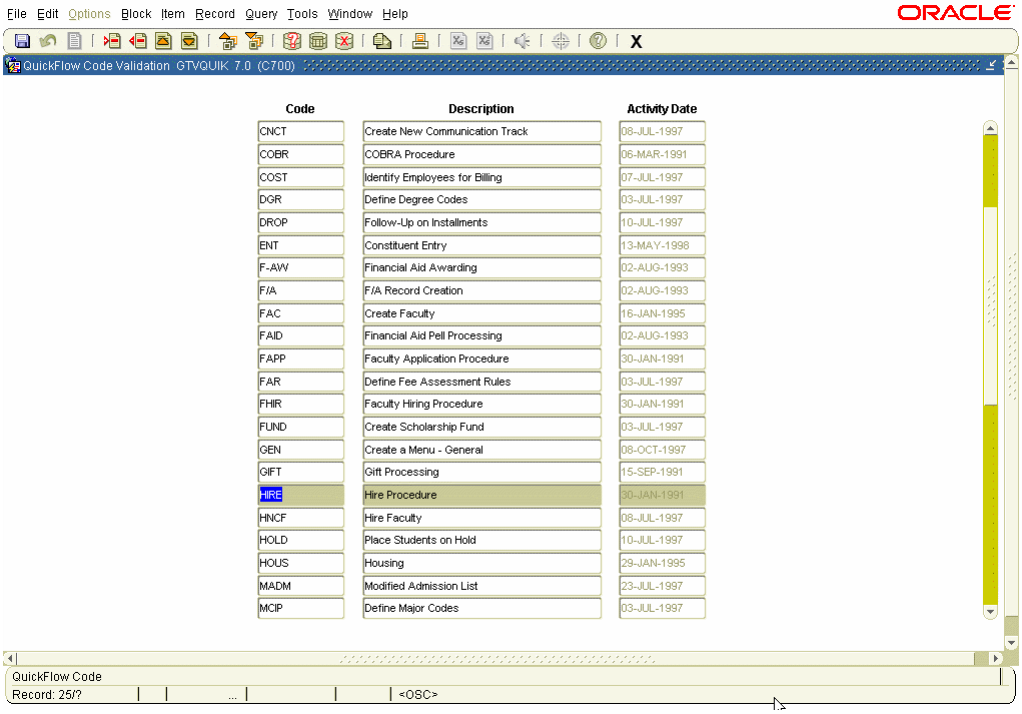
QuickFlow is ideal for linking a series of Banner forms together to create an automated process to ensure all actions associated with a task are completed.

When you enter the QuickFlow name on the QuickFlow Form (GUAQFLW) and click **Start**, the system executes the first form defined in the QuickFlow list. After you exit the first form in the list, the system executes the second form in the QuickFlow list. This pattern continues until the system executes all of the forms in the QuickFlow list.

Note: You can only execute QuickFlow lists that were defined using the GTVQUIK and GUAQUIK forms.

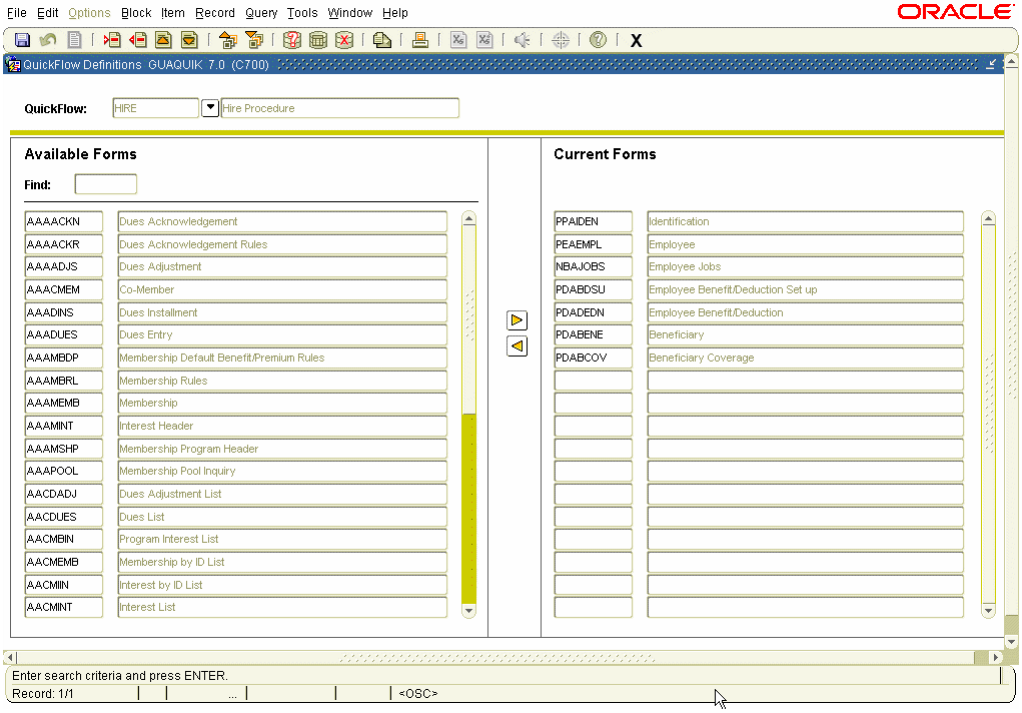
Banner form

First, use the QuickFlow Code Validation Form (GTVQUIK) to create the name of your QuickFlow.



Banner form

Then, use the QuickFlow Definitions Form (GUAQUIK) to add and remove forms on your QuickFlow. Use the arrow icons in the center of the screen to add or remove forms on your Current Forms list.



Note: You can scroll through the list of available forms or use the **Find** function to locate specific forms.

Human Resources Overview

Lesson: QuickFlows (Continued)

Jump to TOC

Procedure

Follow these steps to create a QuickFlow for a process that requires many different forms to be completed. Your instructor will identify the appropriate form names to use.

Step	Action
1	Access the QuickFlow Code Validation Form (GTVQUIK).
2	Select the **Insert Record** function.
3	Enter a QuickFlow code in the **Code** field that uniquely defines the desired process. Note: The code can be up to 10 characters, but must begin with an alpha character.
4	Enter a description in the **Description** field of the QuickFlow code per. Note: The description can be up to 30 characters.
5	Click the **Save** icon.
6	Click the **Exit** icon.
7	Access the QuickFlow Definition Form (GUAQUIK).
8	Enter the code in the **QuickFlow** field you just created on the QuickFlow Code Validation Form (GTVQUIK). You may use the drop down function to search.
9	Select the **Next Block** function.
10	Click the **Insert** or **Remove** arrow icons in the center of the screen to add or remove forms on your Current Forms list. Warning: Make sure to enter the forms in the order they should be accessed to achieve the task required. Note: You can use the **Find** function to locate the form you need by entering the search information, including "%", the Banner wild card, to pull up the form names. You can also scroll through the list of form names in the Available Forms section.
11	Click the **Save** icon.
12	Click the **Exit** icon.
13	Access the QuickFlow form (GUAQFLW).
14	Enter the name of the QuickFlow process that you created in Step 3 in the **QuickFlow** field.
15	Click the **Start** button.
16	Exit through each of the forms in the process to return to the QuickFlow form.
17	Click the **Exit** icon.

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Human Resources Overview

Lesson: Self Check

Jump to TOC

Directions Questions 1-9

Match the Banner module from the list on the left with the description on the right. Try to do this without using your workbook notes.

a. Applicant Administration	_____	1. Maintains employee job and salary information.
b. Electronic Approvals	_____	2. Supports the entry and reporting of employee health information.
c. Biographic/Demographic Information	_____	3. Collects time sheet data and calculates paychecks.
d. Employment/Comp Administration	_____	4. Creates and maintains records on applicants for existing positions.
e. Employee Relations Administration	_____	5. Creates and maintains labor-related and bargaining unit information.
f. Health and Safety Administration	_____	6. Establishes basic information about an applicant or employee.
g. Benefit/Deduction Administration	_____	7. Records employee benefit information.
h. Position Management	_____	8. Provides an approval signature process.
i. Time Entry/Payroll Processing	_____	9. Defines jobs families and position characteristics.

Question 10

Create a Quickflow for one of the modules. Try to do this without looking at the steps presented in the Quickflow exercise.

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Human Resources Overview

Lesson: Answer Key

Jump to TOC

Answers to Questions 1 - 9

a. Applicant Administration

b. Electronic Approvals

c. Biographic/Demographic Information

d. Employment/Comp Administration

e. Employee Relations Administration

f. Health and Safety Administration

g. Benefit/Deduction Administration

h. Position Management

i. Time Entry/Payroll Processing

D 1. Supports the entering and reporting of employee information.

F 2. Supports the entry and reporting of employee health information.

I 3. Collects time sheet data and calculates paychecks.

A 4. Creates and maintains records on applicants for existing positions.

E 5. Creates and maintains labor-related and bargaining unit information.

C 6. Establishes basic information about an applicant or employee.

G 7. Records employee benefit information.

B 8. Provides an approval signature process.

H 9. Defines jobs families and position characteristics.

Question 10

Refer to the steps presented in the QuickFlow exercise.

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Release Date

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This workbook was last updated on 04/17/2007.