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# What's New in Banner 7.2

## Human Resources & Payroll Guide

**UNIVERSITY OF ILLINOIS**  
CHICAGO • SPRINGFIELD • URBANA-CHAMPAIGN

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**HR|Administration**  
Department of Staff & Organization Development

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- Do not share confidential and sensitive information with anyone, including colleagues, unless there is a business reason.
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- When disposing of reports containing confidential or sensitive information, shred the documents in a timely manner.

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## Introduction and General Information

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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.

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## 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.

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## 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/>.

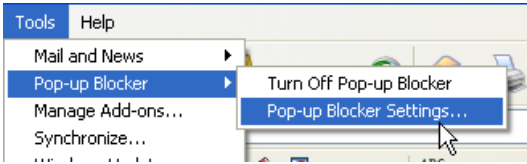
## The New General Menu (GUAGMNU)

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](http://www.uillinois.edu)

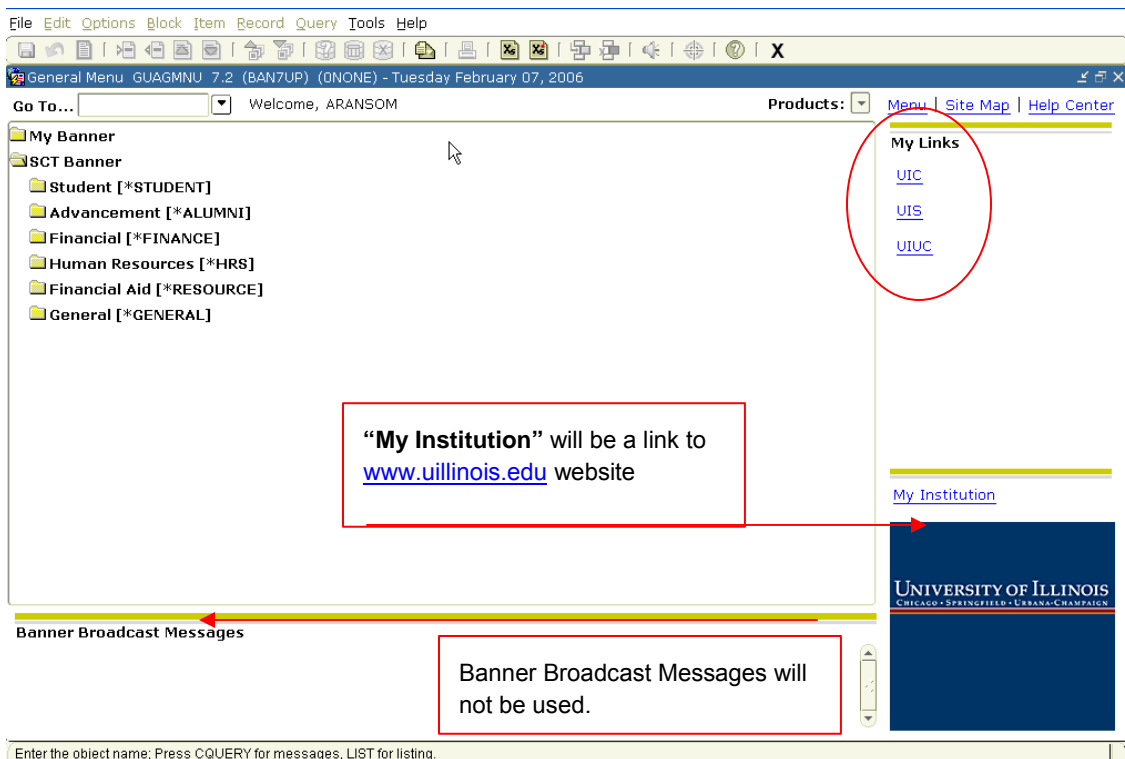
 **NOTE:** If you click on these links and the new browser window does not open, it may be because your Internet Pop-Up Blocker settings are not allowing the new browser window to open. You can test this by holding down the CTRL key on your keyboard while clicking the link. If this works, you can either:

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**



**OR**

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



The screenshot shows the GUAGMNU web application interface. The main content area is divided into two columns. The left column contains a tree view with folders for "My Banner" and "SCT Banner", each containing sub-folders for various departments like Student, Advancement, Financial, Human Resources, Financial Aid, and General. The right column contains a "My Links" section with three links: UIC, UIS, and UIUC, which are circled in red. Below these is a "My Institution" link, also circled in red, with an arrow pointing to a text box that says "“My Institution” will be a link to [www.uillinois.edu](http://www.uillinois.edu) website". At the bottom of the page, there is a "Banner Broadcast Messages" section, with an arrow pointing to a text box that says "Banner Broadcast Messages will not be used." The top of the page has a navigation bar with "Menu", "Site Map", and "Help Center" links. The bottom of the page has a footer with the text "Enter the object name; Press CQUERY for messages, LIST for listing."

## Changes to Direct Access field

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

Go:  **Go To...**

- 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.

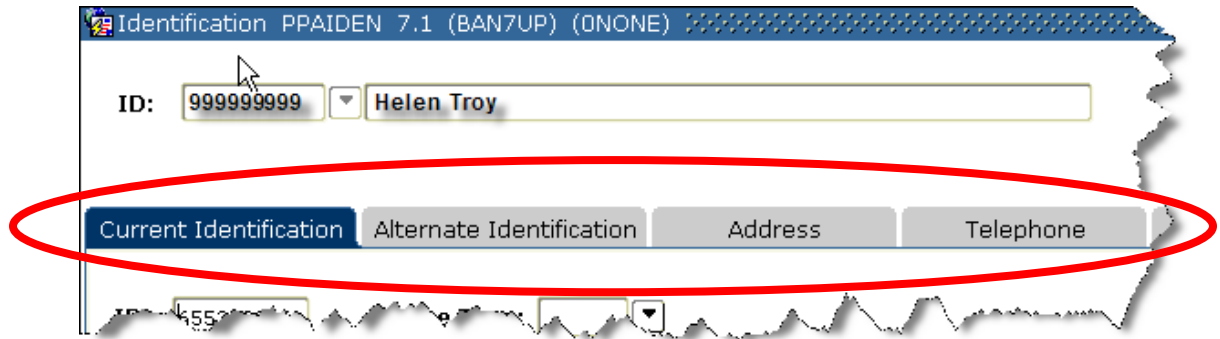
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## Navigation Changes

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### 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.

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## 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.

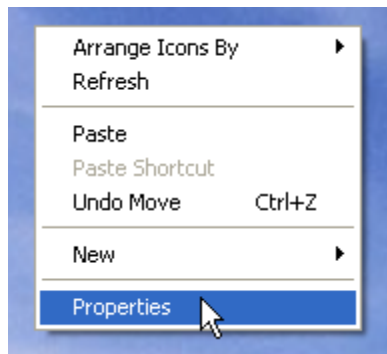


**NOTE:** This change does not impact self-service use of Banner.

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

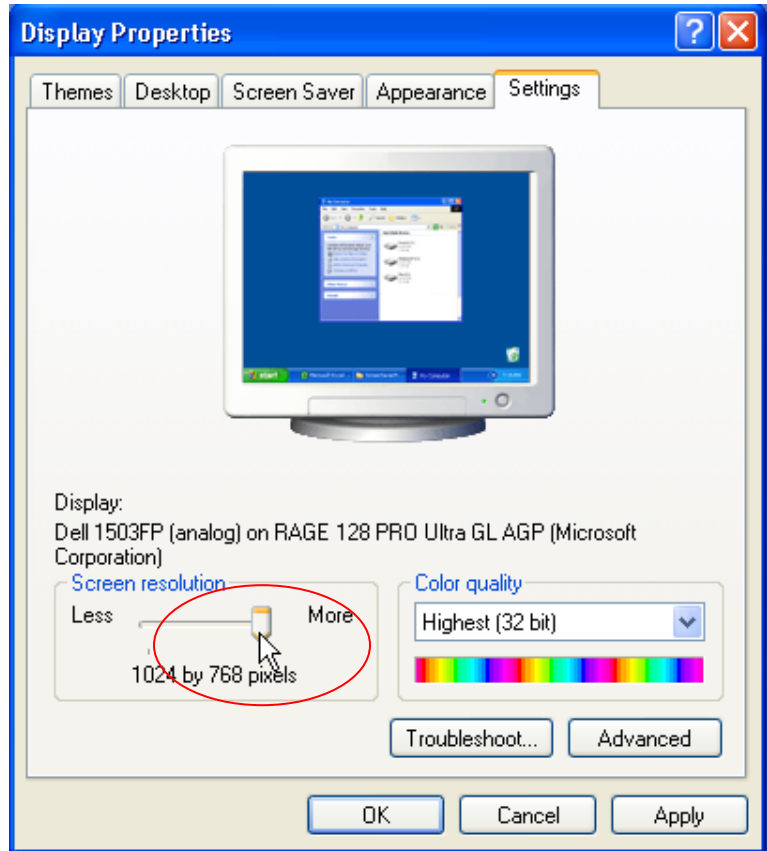
To change screen resolutions in any version of Windows:

1. Right-click on a blank area of your desktop, and left-click on Properties.



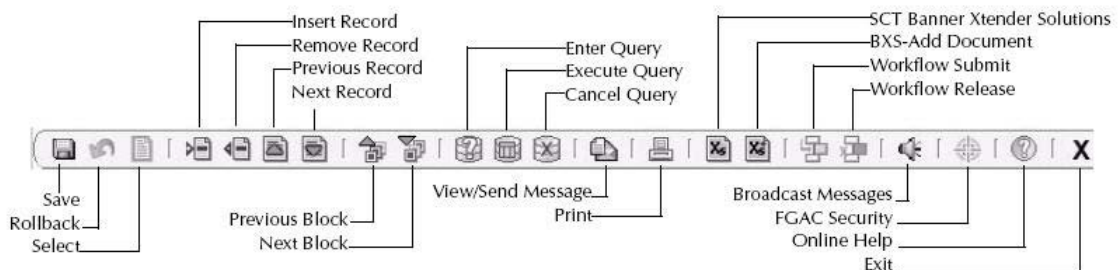
2. On the Properties dialog box, click on the Settings tab.
3. In the Screen Resolution area towards the bottom left, drag the slider to 1024 by 768 pixels setting.
4. Click **OK**. It sometimes takes a minute for the settings to adjust, so do not be concerned if it pauses before adjusting.

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.



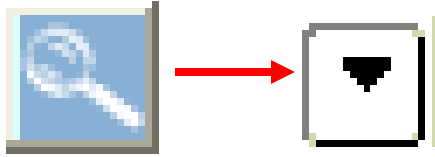
**Icon Crosswalk from 6 to 7**

7	Action	6
	Save	
	Rollback	
	Select [SHIFT+F3]	
	Insert Record	
	Delete Record	
	Enter Query [F7]	
	Execute Query [F8]	
	Cancel Query [CTRL+Q]	
	Previous Record	
	Next Record	
	Previous Block [CTRL+PG UP]	
	Next Block [CTRL+PG DN]	
	View/Send Message	
	Print	
No Icon	Graph	
	Banner Extender Solutions (BXS)	
	BXS – Add a Document	
No Icon	Open Electronic Document	
	Workflow Submit	
	Workflow Release	
No Icon	Show Keys [CTRL+F1]	
No Icon	Bookshelf	
	Online Help	
	Exit [CTRL+Q]	

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## Different Search icon

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








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## 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.

### Service Dates


<b>Current Hire:</b>	06-DEC-2001	
<b>Original Hire:</b>	06-DEC-2001	
<b>Adjusted Service:</b>	06-DEC-2001	
<b>Seniority:</b>	06-DEC-2001	
<b>First Work Date:</b>	06-DEC-2001	

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## 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](http://www.uillinois.edu) when implemented at the University of Illinois.

## Disabled text now black, not gray: the good and bad news

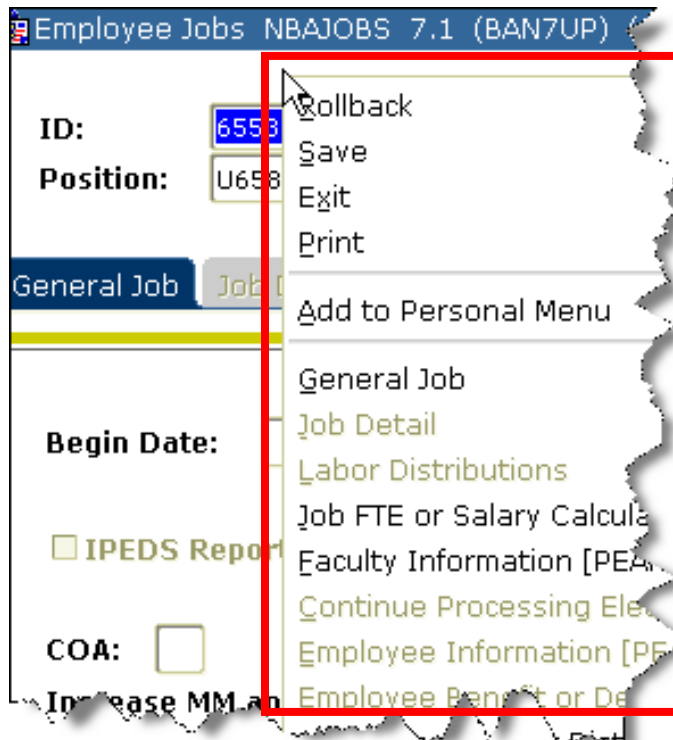
Disabled text is now black (the same as regular text), making it easier to read. However, it is more difficult to visually discern if a field is updatable because the text is the same color.

## 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

The screenshot displays the Banner 7.2 General Information Form (PPAGENL) for user Neil Armstrong. The 'General Education' tab is selected, showing fields for Institution, SDGI Code, Degree, GPA, Hours, Level, First Attended Date, Last Attended Date, Graduation Date, and Terminal Degree checkbox. It also features sections for Major and Minor, and Area of Concentration.

### 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 (PDAEDN)

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 PDAEDN.
2. The Arrear Information window has been removed and the relevant fields have been relocated to the *Arrears* block of PDAEDN.

Employee Benefit/Deduction PDAEDN 7.1 (BANTRND) (NONE)

ID: 122222222 Neil Armstrong

Benefit Category: TC Temporary Change

Deduction: AOB C9 State Basic AD&D BW

Last Paid Date: [ ]

Query Date: 01-DEC-2005

Begin Date: 01-DEC-2005 End Date: [ ] Calculation Rule: 50 Bond Balance: [ ]

Effective Date: [ ] Status: [ ] Reference: [ ]

Options			Amounts		
Title	Value	Entry	Title	Amount	Entry
1	[ ]	[ ]	1	[ ]	[ ]
2	[ ]	[ ]	2	[ ]	[ ]
3	[ ]	[ ]	3	[ ]	[ ]
4	[ ]	[ ]	4	[ ]	[ ]
5	[ ]	[ ]			

## 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

Adjustment Processing Form PZAADJT 7.1 [MC:33.0] (BANTRND) (DNONE)

ID:

Year:  Payroll ID:  Payroll Number:  Sequence Number:

Adjustment Action: (None) History Date:  Posting Override Date:

Adjustment Detail Job Information Comments

Adjustment Detail

Disposition:

Event Type:

Calculation Method:

Print Method:

Gross and Net Amounts

Entered Gross:  Calculated Gross:

Entered Net:  Calculated Net:

Document Total:

This event Associated with Sequence Number:

This event Adjusts Sequence Number:  Date:

This event is Adjusted By Sequence Number:  Date:

User ID:

## 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

The screenshot shows the 'Employee Jobs' form for employee Hermione Cranger. The 'Job Detail' tab is active. Key fields include:
 

- Effective Date: 16-AUG-2005
- Personnel Date: 16-AUG-2005
- Status: Active
- Title: Vst Coordinator
- Job FTE: 1.000
- Appointment Percent: 100.00
- Encumbrance Hours: 0.00
- Encumbrance Indicator: System Calculated
- Hours per Day: 0.00
- Employee Class: BA Acad/Pro 12mth Ben Elig
- Leave Category: Y3 12/12 mth 2 FH 25
- Change Reason: S4018 Salary Planner Upload
- Employer Code: UI University of Illinois
- Pay Plan: Group 2006, Grade UNDFD, Table AA, Step 0
- Compensation: Rate 14.42354, Hours per Pay 173.33, Assign Salary 2500.00, Factor 12.0, Pays 12.0, Annual Salary 30000.00

### Other Changes

1. All fields now visible in the *Default Earnings* and *Job Labor Distribution* window without scrolling

Effective Date	Earnings Code	Hours or Units	Deemed	Special Rate	Shift	Ended as of Date
01-FEB-2005	RGE Regular Pay-Exempt	173.33			1	

*Default Earnings Block – No More Scrolling*

COA	Index	Fund	Orgn	Account	Program	Activity	Location	Project	Cost	Percent
9		100006	804000	211300	804001					100.00

*Job Labor Distribution Block – No More Scrolling here, either*

## 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

The screenshot shows the 'Position Budget - NBAPBUD 7.0 (BAN7UD) (NONE)' window. At the top, there are input fields for 'Fiscal Year' (2005), 'Position' (U65872), 'Employee Class' (BA Acad/Pro 12mth Ben Elig), and 'Position Title' (Clarice Stirling). Below these are several tabs: 'Position Budget' (selected), 'Salary Budgets', 'Fringe Benefit', 'Premium Earnings/Totals', 'Labor Distributions', and 'Comments'. The main content area is divided into sections: 'Status' (Active), 'Budget Profile' (R), 'Type' (Single), and 'COA' (9). There are also 'Position Effective Dates' (Begin Date: 01-FEB-2005, End Date: ), 'Budget Roll Rules' (Salary: Current Salary, Premium Earnings: Not Applicable), and 'Budget Authorization' (Authorized By: ).

## 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



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## Changes to non-tabbed forms

### Form

### Change

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#### Employee Search Form (POIDEN)

Used to search for an employee – especially helpful when you do not know UIN.

All fields visible in the Main window without scrolling

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#### Employee Leave Balances (PEALEAV)

Used to view leave balances for an employee.

Shows only 2 jobs in the block in stead of 3 jobs to select from.

---

#### Employee FMLA Information Form (PEAFMLA)

Used to track FMLA Leaves of Absence in Banner.

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).

---

#### One-Time Payment Form (PEA1PAY)

Used to process a one time payment.

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.

---

#### One-Time Payment Inquiry Form (PEI1PAY)

Used to query a one time payment.

In the Main window, the following fields have been relocated to outside of the horizontal scroll area:

- Birth Month and Day
- Payroll Date
- Citizenship

---

#### Certification Information Form (PPACERT)

Used to view Certification / License / Endorsement information.

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

**Form**

**Change**

---

**Job Changes Detail Display Form (PEAJCDD)**

Used by Central HR.

The blocks in the Main window have been renamed:

- Job
- Compensation

All fields in the Compensation block visible without scrolling

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**Faculty Action Tracking Form (PEAFAC)**

Used by the Provost's office to track faculty.

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.

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**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.uillinois.edu/dart-cf/training/index.cfm>

Department email: [hrrsd@uillinois.edu](mailto:hrrsd@uillinois.edu)