

HRFE Foundations HR FRONT END TRAINING HOW-TO GUIDE



Acknowledgements

Portions of this manual are based on Ellucian Banner System, Release 9.3.0.1.

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Course Information

Course ID: HRFE Foundations

Revision Date: October 10, 2020

Version: 1.0

APPROPRIATE USE AND SECURITY OF CONFIDENTIAL AND SENSITIVE INFORMATION

Similar to Banner, HRFE allows you to access confidential and sensitive information. Guidelines have been created to help you manage your responsibility.

You are responsible for any activity that occurs using your login

- 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 have access to very sensitive personal information

- 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).
- Shred the documents in a timely manner when disposing of reports containing confidential or sensitive information.

Any violation could subject you to disciplinary action.

Course Menu

HR Front End Foundations

Intro - Page 1

Welcome to the:

HR Front End Foundations

Course

Estimated Time: 1 HOUR

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UNIVERSITY OF CALIFORNIA

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CHAPTER	YOU WILL LEARN ABOUT
1 – University Structure	<ul style="list-style-type: none">• Physical Campuses• University Administration• Global Campus• Accounting Elements of the C-FOAPAL structure• Organizations
2 – University Employees	<ul style="list-style-type: none">• The HR Pay ID Hierarchy Structure• Categorizing Employees• Pay ID• Employee Groups• Employee Classifications
3 – Entering Data Into Banner	<ul style="list-style-type: none">• Banner History• Frequently Used Banner Forms• Terminology Related to Banner
4 – The HR Front End Application	<ul style="list-style-type: none">• Why the application was created• Locating data in the application• Transitioning from Banner to the HR Front End Application

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Introducing Frank Smith....



Frank Smith is an employee of the University of Illinois. Throughout this course, Frank will be our employee example to help us explore the different aspects of an employee at the University.

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Ch1. - University Structure

Users will learn about concepts
pertaining to:

- Physical Campuses
- University Administration
- Global Campus
- Accounting elements of the C-FOAPAL structure
- Organizations

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The University of Illinois is partitioned into:

- Physical Campuses
- University Administration
- A global campus



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Physical Campuses refer to the physical campuses that reside under the canopy of the University of Illinois.

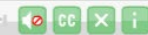
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Physical Campuses, also known as district/division, refer to the physical location where an employee works (with the exception of Global Campus).



There are three (3) physical campuses that reside under the canopy of the University of Illinois:

- (C) Chicago
- (S) Springfield
- (U) Urbana-Champaign

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University Administration is comprised of units that provide services to all three campuses.



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Examples of these services include:

- Finance
- Human Resources
- Technology



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Global Campus refers to a virtual campus
that allows students from all over the world
to take courses online.



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Chart of accounts: A single-digit code that refers to the specific university campus or major accounting entity used to facilitate financial reporting [*see C-foapal structure on next screen*].

It indicates the highest level of any pool of money. Each campus, university administration, and global campus has their own Chart number. **Listed below are the five chart numbers** for the University of Illinois:

- (9) University Administration
- (7) Global Campus
- (4) Springfield
- (2) Chicago
- (1) Urbana-Champaign



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The C-Foapal Structure:

The C-Foapal structure is rooted in the finance module in banner. C-Foapal is a way of accounting for money at the university. For example: It is a way of telling from which account money is exchanged, either for employee pay or finances used for other resources.

It tells which funding is used to pay an employee. Each segment of the C-Foapal structure indicates different information about the account being used to pay the employee.

Chart

- A one-digit code for a campus or major accounting entity, used to facilitate financial reporting.



Hover your mouse over each letter for C-FOAPAL details

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Fund

- A fund maintains a fund balance and a cumulative record of the sources and uses of monies.



Hover your mouse over each letter for C-FOAPAL details

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Organization

- Used to identify a functional reporting department (such as a school, college, or department) with discrete financial activities.



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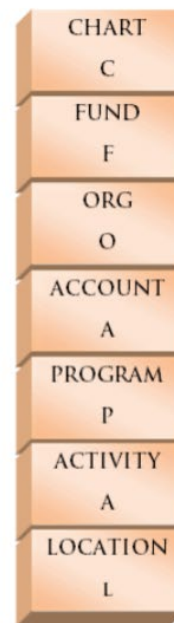
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Account

- A code representing revenue, expenditures, asset, liability, equity, and transfers.



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Program

- Determines the use of monies at the expenditure level. Program designates NACUBO functional classifications (e.g. instruction, research, public service, institutional support, and sub-classifications).



Hover your mouse over each letter for C-FOAPAL details

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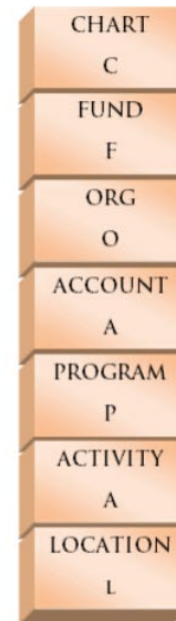
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Activity

- An optional segment for use in tracking non-budget control financial activities. The activity is usually short in duration.

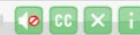


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Location

- An optional segment primarily used with, but not limited to, the fixed asset module to designate physical places or sites, such as building and room number.



Hover your mouse over each letter for C-FOAPAL details

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Organization

(referred to as *orgs*)

Organization: Pertains to the specific unit to which an employee reports for duty.

There are two common types of Orgs relating to HR to which an employee can belong:

- Home Org
- Timesheet Org

HOME ORG

TIMESHEET
ORG

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Home Org

- Home Org coordinates the employment of an individual.
- In many cases, this is also the employee's timesheet org.

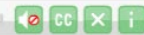
HOME ORG

TIMESHEET
ORG

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Timesheet Org

- The timesheet org refers to any org to which the employee reports time.
- Depending on the number of jobs that the employee has (and different Timesheet Orgs), there may be multiple timesheet orgs.

A light purple rounded rectangular button with the text "HOME ORG" in white capital letters.A dark purple rounded rectangular button with the text "TIMESHEET ORG" in white capital letters.A green speech bubble-shaped button with the text "Click Next to continue" in red.

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Employee Example:



Name: Frank Smith

Physical Campus: Urbana

Chart of Accounts: 9 (University Administration)

Home Org: 9-904000 (*Assoc VP Human Resources*)

Time sheet Org(s):

- 9-904000 (*Assoc VP Human Resources*)
- 1-336000 (*Intercollegiate Athletics*)

C-Foapal:

- Division of Athletics
(1-302242-336000-211300-336069)
- Human Resources
(9-100009-904000-21130-904003)

Chart	Fund	Org	Account	Program	Activity	Location
1	302242	336000	211300	336069		

Chart	Fund	Org	Account	Program	Activity	Location
9	100009	904000	21130	904003		



HOME ORG

TIMESHEET ORG

CHART
C
FUND
F
ORG
O
ACCOUNT
A
PROGRAM
P
ACTIVITY
A
LOCATION
L

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Ch.2 - University Employees

Users will learn about concepts pertaining to:

- The HR Pay ID hierarchy structure
- Categorizing employees
- Pay ID
- Employee groups
- Employee classes and classifications

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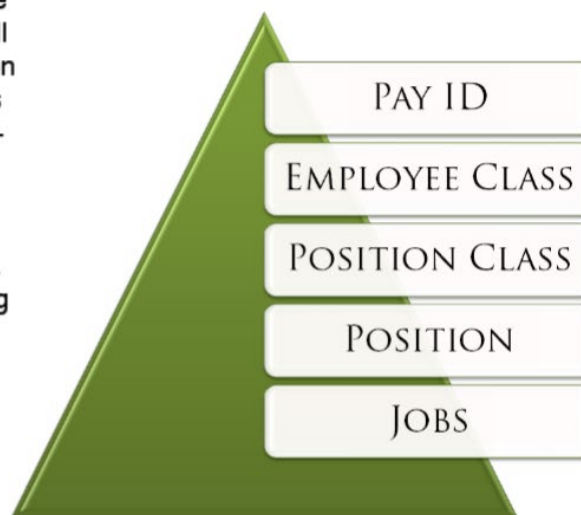


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HR Pay ID Hierarchy Structure:

This structure is the way in which Banner architecture was designed to handle human resources and payroll data. A key feature of this structure is that information entered at one level of the hierarchy defaults or flows into the lower levels, resulting in reduced need for re-keying data.

This helps categorize employees and describe the relationship between employees, positions, and jobs. This will be described in further detail on the following slides.



Hover your mouse over each hierarchy level

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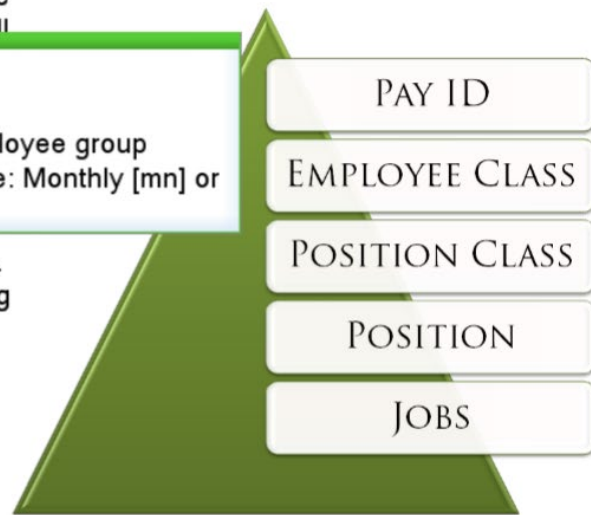
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HR Pay ID Hierarchy Structure:

This structure is the way in which Banner architecture was designed to handle human resources and payroll data. A key feature entered at one level flows into the lower levels as keying data.

- Controls how often a particular employee group receives compensation (for example: Monthly [mn] or Bi-weekly [bw]).

This helps categorize employees and describe the relationship between employees, positions, and jobs. This will be described in further detail on the following slides.



Hover your mouse over each hierarchy level

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HR Pay ID Hierarchy Structure:

This structure is the way in which Banner architecture was designed to handle human resources and payroll data. A key feature entered at one level flows into the lower levels, creating a hierarchy of keying data.

This helps categorize the relationship between data. This will be described in the slides.

Employee Class

- Allows you to specify high-level employee groupings.
- Examples of e-classes include:
 - **CA** - civil service 75 hours/pay period, non-exempt benefits eligible
 - **EH** - civil service extra help
 - **SA** - student
 - **HA** - academic/grad hourly
 - **AL** - academic 12-month benefit eligible
 - **BA** - academic professional 12-month benefit eligible
 - **GA** - graduate assistants

PAY ID

EMPLOYEE CLASS

POSITION CLASS

POSITION

JOBS

Hover your mouse over each hierarchy level

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HR Pay ID Hierarchy Structure:

This structure is the way in which Banner architecture was designed to handle human resources and payroll data. A key feature entered at one level flows into the lower levels, creating a keying data.

This helps categorize the relationship between the data. This will be described in the slides.

Position Class

- Is used to group employees in similar job titles and classifications.
- Examples of P-classes include:
 - 0051 Adminv. Aide
 - 01716 Adminv. Asst 1 (lc)
 - 07712 Libr. clerk 1 (LS)
 - AAAAAA tenure 9-mo professors
 - BAAEG Othac 9-mo professors endow emeritus
 - FEAAA Vice president
 - HAAAA Provost
 - LAAAA Dean
 - NAAAA Director

PAY ID

EMPLOYEE CLASS

POSITION CLASS

POSITION

JOBS

Hover your mouse over each hierarchy level

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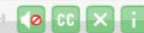
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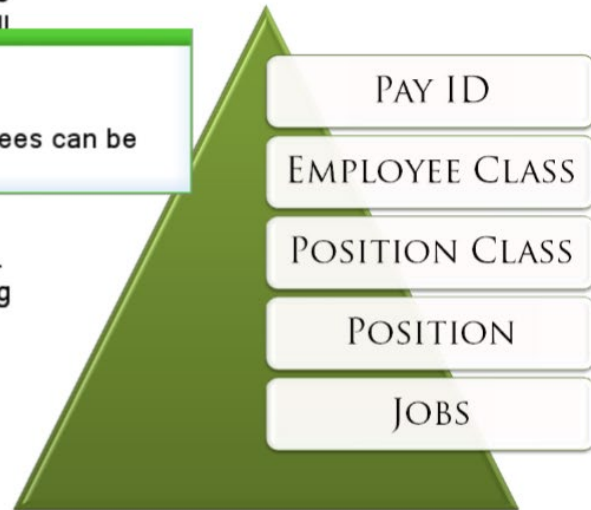
HR Pay ID Hierarchy Structure:

This structure is the way in which Banner architecture was designed to handle human resources and payroll data. A key feature entered at one level flows into the lower levels, creating a hierarchy of keying data.

Position

- Is a budgeted slot for which employees can be recruited and hired.

This helps categorize employees and describe the relationship between employees, positions, and jobs. This will be described in further detail on the following slides.



Hover your mouse over each hierarchy level

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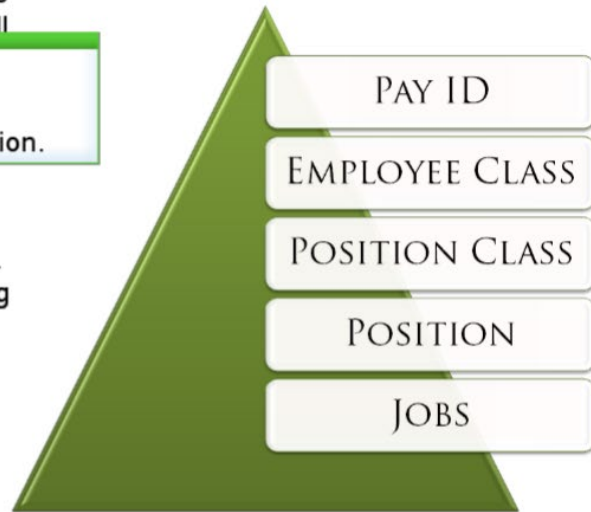
HR Pay ID Hierarchy Structure:

This structure is the way in which Banner architecture was designed to handle human resources and payroll data. A key feature entered at one level flows into the lower levels as keying data.

Jobs

- Exist when an individual fills a position.

This helps categorize employees and describe the relationship between employees, positions, and jobs. This will be described in further detail on the following slides.



Hover your mouse over each hierarchy level

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07



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Categorizing Employees

University employees are categorized in a hierarchical structure comprised of **Pay ID**, **Employee Group**, and **Employee Class**.

PAY ID

EMPLOYEE
GROUP

EMPLOYEE
CLASS

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Pay ID

The Pay ID describes how often an employee is paid. There are two Pay IDs used (Bi-weekly and Monthly). Examples of these are:

- **Bi-weekly (BW)** - Civil service, extra help, academic hourly, or grad hourly employees
- **Monthly (MN)**- Faculty, other academics, academic professionals, grads, or unpaid employees.

A red, rounded rectangular button with the text "PAY ID" in white, sans-serif, uppercase letters.A light red, rounded rectangular button with the text "EMPLOYEE GROUP" in white, sans-serif, uppercase letters.A light red, rounded rectangular button with the text "EMPLOYEE CLASS" in white, sans-serif, uppercase letters.A green, rounded rectangular callout box with a white border and a small tail pointing towards the bottom right. It contains the text "Click Next to continue" in red, sans-serif font.

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Employee Group

While not a Banner construct, the Employee Group is based upon University statutes. The University has many different categories under which employees fall. Employee Groups reflect:

- The commonality of the hiring process
- Benefits eligibility
- And other factors



PAY ID

EMPLOYEE
GROUP

EMPLOYEE
CLASS

The Employee Group determines the first letter of the employee class, which will be covered later in this chapter.

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Employee Groups

- EXAMPLE • Civil Service (C)
- EXAMPLE • Extra Help (E)
- EXAMPLE • Academic Professional (B)
- EXAMPLE • Faculty and Other Academics (A)
- EXAMPLE • Academic Hourly (H)
- EXAMPLE • Academic Unpaid (U)
- EXAMPLE • Graduate Assistants and Pre-doctoral Fellows (G)
- EXAMPLE • Post-Docs and Interns (P)
- EXAMPLE • Residents (R)
- EXAMPLE • Graduate hourly (H)
- EXAMPLE • Students (s)
- EXAMPLE • Retirees (t)

PAY ID

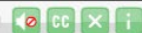
EMPLOYEE
GROUPEMPLOYEE
CLASS

Hover your mouse over each Example

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Employee Groups

- EXAMPLE • Civil Service (Paid weekly)
(Example: Accountant, Electrician, Staff Secretary, Building Service Worker)
- EXAMPLE • Ext
- EXAMPLE • Acc
- EXAMPLE • Fac
- EXAMPLE • Acc
- EXAMPLE • Acc
- EXAMPLE • Gra
- EXAMPLE • Pos
- EXAMPLE • Res
- EXAMPLE • Gra
- EXAMPLE • Stu
- EXAMPLE • Ret
- Clerical, technical, and professional classifications are governed by the state universities civil service system.
 - Individuals qualify for these positions based on examinations. Employees are hired under civil service rules and regulations.
 - Employees who may serve in a professional or administrative support capacity.
 - Also includes the crafts and trade, office support, building and grounds, laboratory support, and a variety of other roles.

PAY ID

EMPLOYEE
GROUPEMPLOYEE
CLASS

Hover your mouse over each Example

UNIVERSITY OF ILLINOIS
State University • Urbana • Champaign

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Employee Groups

EXAMPLE • Civil Service (C)

EXAMPLE • Extra Help

EXAMPLE • Academic

EXAMPLE • Faculty

EXAMPLE • Academic

EXAMPLE • Academic

EXAMPLE • Graduate Assistants and Pre-doctoral Fellows (G)

EXAMPLE • Post-Docs and Interns (P)

EXAMPLE • Residents (R)

EXAMPLE • Graduate hourly (H)

EXAMPLE • Students (s)

EXAMPLE • Retirees (t)

Extra Help *(paid bi-weekly)*

• Employment is similar to civil service, but completed on a temporary basis. Employees who provide office, technical, or other general support on a temporary basis.

PAY ID

EMPLOYEE
GROUP

EMPLOYEE
CLASS

Hover your mouse over each Example

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Employee Groups

- EXAMPLE • Civil Service (C)
- EXAMPLE • Extra Duty (E)
- EXAMPLE • Academic professional (paid monthly)
(Example: Director, research engineer, communications specialist)
- EXAMPLE • Faculty (F)
- EXAMPLE • Academic (A)
- EXAMPLE • Academic (A)
- EXAMPLE • Graduate (G)
- EXAMPLE • Professional (P)
- EXAMPLE • Research (R)
- EXAMPLE • Graduate (G)
- EXAMPLE • Students (s)
- EXAMPLE • Retirees (t)

PAY ID

EMPLOYEE
GROUPEMPLOYEE
CLASS

Hover your mouse over each Example

UNIVERSITY OF ILLINOIS
SPRINGFIELD • CHICAGO • URBANA-CHAMPAIGN

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ADOBE CAPTIVATE™

Employee Groups

- EXAMPLE • Civil Service (C)
 - EXAMPLE • Extr
 - EXAMPLE • Aca (Faculty Example: Professor, Associate Professor. Other Academic Example: Instructor, Lecturer)
 - EXAMPLE • Fac
 - EXAMPLE • Aca
 - EXAMPLE • Aca
 - EXAMPLE • Gra
 - EXAMPLE • Pos
 - EXAMPLE • Res
 - EXAMPLE • Gra
 - EXAMPLE • Stu
 - EXAMPLE • Ret
- Faculty and Other Academics** *(Paid Monthly)*

(Faculty Example: Professor, Associate Professor. Other Academic Example: Instructor, Lecturer)

 - World-class faculty members at the University of Illinois teach, conduct research, and engage in public service projects.
 - Non-tenure positions may be available for adjunct, clinical research, teaching, or visiting faculty.
 - Advanced degree required.
 - Other academic positions include: instructors, lecturers, post-docs, and others.

PAY ID

EMPLOYEE
GROUPEMPLOYEE
CLASS

Hover your mouse over each Example

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CHICAGO

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ADOBE CAPTIVATE™

Employee Groups

- EXAMPLE • Civil Service (C)
- EXAMPLE • Extra Help (H)
- EXAMPLE • Academic Hourly (A) • **Academic Hourly** (*Paid Bi-weekly*)
- EXAMPLE • Faculty • Employees who provide professional or technical support on a temporary basis.
- EXAMPLE • Academic • Minimum of a Bachelor's degree is required.
- EXAMPLE • Academic
- EXAMPLE • Graduate Assistants and Pre-doctoral Fellows (G)
- EXAMPLE • Post-Docs and Interns (P)
- EXAMPLE • Residents (R)
- EXAMPLE • Graduate hourly (H)
- EXAMPLE • Students (s)
- EXAMPLE • Retirees (t)

PAY ID

EMPLOYEE
GROUPEMPLOYEE
CLASS

Hover your mouse over each Example

UNIVERSITY OF ILLINOIS
CHICAGO

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ADOBE® CAPTIVATE™

Employee Groups

- EXAMPLE • Civil Service (C)
- EXAMPLE • Extra Help
- EXAMPLE • Academic Unpaid
- EXAMPLE • Faculty & • Official affiliates of the University.
- EXAMPLE • Academic • minimum of a Bachelor's degree required.
- EXAMPLE • Academic Unpaid (U)
- EXAMPLE • Graduate Assistants and Pre-doctoral Fellows (G)
- EXAMPLE • Post-Docs and Interns (P)
- EXAMPLE • Residents (R)
- EXAMPLE • Graduate hourly (H)
- EXAMPLE • Students (s)
- EXAMPLE • Retirees (t)

Academic Unpaid

PAY ID

EMPLOYEE
GROUPEMPLOYEE
CLASS

Hover your mouse over each Example

UNIVERSITY OF ILLINOIS
Leading in Learning • Growing in Knowledge • Advancing in Research

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ADOBE® CAPTIVATE™

Employee Groups

- EXAMPLE • Civil Service (C)
- EXAMPLE • Extended Term (E)
- EXAMPLE • Academic (A)
- EXAMPLE • Faculty (F)
- EXAMPLE • Academic (A)
- EXAMPLE • Academic (A)
- EXAMPLE • Graduate assistants and Pre-doctoral fellows (*Paid Monthly*)
(Example: Graduate assistant, graduate research assistant, graduate teaching assistant, pre-doc fellow)
- EXAMPLE • Graduate students who are also employed in a research assistant or other capacity.
- EXAMPLE • Post-doctoral fellows are graduate students with a fellowship.
- EXAMPLE • Research (R) • minimum of a bachelor's degree required.
- EXAMPLE • Graduate hourly (H)
- EXAMPLE • Students (s)
- EXAMPLE • Retirees (t)

PAY ID

EMPLOYEE
GROUPEMPLOYEE
CLASS

Hover your mouse over each Example

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SPRINGFIELD • CHICAGO • URBANA-CHAMPAIGN

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ADOBE CAPTIVATE™

Employee Groups

- EXAMPLE • Civil Service (C)
- EXAMPLE • Extracurricular (E)
- EXAMPLE • Academic (A) (Example: Post-doc research associate, post-doc fellows, intern)
- EXAMPLE • Faculty (F)
- EXAMPLE • Academic (A) • Positions which require advanced degrees and provide the individual financially supported opportunities for research and clinical experience.
- EXAMPLE • Academic (A)
- EXAMPLE • Graduate (G)
- EXAMPLE • Post-Docs and Interns (P)
- EXAMPLE • Residents (R)
- EXAMPLE • Graduate hourly (H)
- EXAMPLE • Students (s)
- EXAMPLE • Retirees (t)

PAY ID

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Employee Groups

- EXAMPLE • Civil Service (C)
- EXAMPLE • Extra Duty (E)
- EXAMPLE • Academic (A)
- EXAMPLE • Faculty (F) • Those who are continuing their education/training after medical school.
- EXAMPLE • Academic Unpaid (U)
- EXAMPLE • Graduate Assistants and Pre-doctoral Fellows (G)
- EXAMPLE • Post-Docs and Interns (P)
- EXAMPLE • Residents (R)
- EXAMPLE • Graduate hourly (H)
- EXAMPLE • Students (s)
- EXAMPLE • Retirees (t)

Residents

Those who are continuing their education/training after medical school.

PAY ID

EMPLOYEE
GROUPEMPLOYEE
CLASS

Hover your mouse over each Example

UNIVERSITY OF ILLINOIS
SPRINGFIELD • CHICAGO • DECATUR • JOLIET

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NEXT >



ADOBE® CAPTIVATE™

Employee Groups

- EXAMPLE • Civil Service (C)
- EXAMPLE • Extra Duty (E)
- EXAMPLE • Academic (A)
- EXAMPLE • Faculty (F)
- EXAMPLE • Academic Support (S)
- EXAMPLE • Academic Support (S)
- EXAMPLE • Graduate Assistants and Pre-doctoral Fellows (G)
- EXAMPLE • Post-Docs and Interns (P)
- EXAMPLE • Residents (R)
- EXAMPLE • Graduate hourly (H)
- EXAMPLE • Students (s)
- EXAMPLE • Retirees (t)

Graduate Hourly (Paid Bi-weekly)

- Graduate students who are employed in an hourly support role. This role does not entitle them to a tuition waiver.
- Minimum of a Bachelor's degree required.

PAY ID

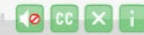
EMPLOYEE
GROUPEMPLOYEE
CLASS

Hover your mouse over each Example

UNIVERSITY OF ILLINOIS
CHICAGO

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NEXT >



ADOBE CAPTIVATE™

Employee Groups

- EXAMPLE • Civil
- EXAMPLE • Extr
- EXAMPLE • Aca
- EXAMPLE • Fac
- EXAMPLE • Aca
- EXAMPLE • Aca
- EXAMPLE • Gra
- EXAMPLE • Pos
- EXAMPLE • Residents (R)
- EXAMPLE • Graduate hourly (H)
- EXAMPLE • Students (s)
- EXAMPLE • Retirees (t)
- Students (Paid Bi-weekly)**

 - Undergraduate students employed in a variety of roles as needed by campus units and departments.
 - Financial support may be tied to federal work study program.
 - Graduate students employed in a variety of roles as needed by campus units and departments.

PAY ID

EMPLOYEE
GROUPEMPLOYEE
CLASS

Hover your mouse over each Example

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SPRINGFIELD • CHICAGO • ST. LOUIS

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ADOBE CAPTIVATE™

Employee Groups

- EXAMPLE • Civil Service (C)
- EXAMPLE • Extra Duty (E)
- EXAMPLE • Academic (A)
- EXAMPLE • Faculty (F) • Employees that have retired from the university, but have been re-hired by the university.
- EXAMPLE • Academic Unpaid (U)
- EXAMPLE • Graduate Assistants and Pre-doctoral Fellows (G)
- EXAMPLE • Post-Docs and Interns (P)
- EXAMPLE • Residents (R)
- EXAMPLE • Graduate hourly (H)
- EXAMPLE • Students (s)
- EXAMPLE • Retirees (t)

Retirees

Employees that have retired from the university, but have been re-hired by the university.

PAY ID

EMPLOYEE
GROUPEMPLOYEE
CLASS

Hover your mouse over each Example

UNIVERSITY OF ILLINOIS
SPRINGFIELD • CHICAGO • DECATUR

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NEXT >



ADOBE CAPTIVATE™

Employee Classifications

Employee Group	Employee Group Definition	Employee Class
C- Civil Service	Support Staff: Accountant, Clerk, Electrician	CA, CB, CC, CD, DA, DB, CE, CF, DD, DE, DG, CG, CH, DK, DL, CJ, DN, DP, CL, DR, DS
B - Academic Professional	Administrative, Research Director, Research Programmer	BA, BB, BC, BD, BE, BF, BG, BH, BJ, BK, BL, BM
A- Faculty	Teaching and Research: Tenure/Tenure-Track	AA, AB, AC, AD, AE, AF, AG, AH, AM
U - Academic Unpaid	Official tie to University with no pay	UA
G - Graduate Assistants and Pre-docs	Graduate Assistant, Teaching Assistant, Research Assistant	GA, GB
P - Post Docs and Interns	Teaching: Non Tenure-Track Post-Doc, Lecturer	PA, PB, PC
R- Residents	Resident Full-Time	RA, RB
Others	<i>Examples Include:</i> Clerical, General Services, 900 Hour Limit, Undergrad - Office, Kitchens, Library, Sporadic Technical Other Work - Degree Required	EH, ES, HA, SA, TR, WT, MM, LP

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Position Class

A **Position Class** (P-class) encompasses a job title or classification, which is identified by a five-character code. This code is used to group employees in similar positions. Each position of the code has an important function.

Position Class Code Example: AAAAA - TENUR 9MO PROFS

1st character: indicates tenure/tenure track faculty, other academics, assistant & fellows or reserve fro growth

2nd character: indicates the service reference, such as a 9-month, 10-month, 12-month, <9month, and Non-service

3rd character: indicates rank, such as professor, instructor, post doc, research associate, grad appointment, etc.

4th character: indicates a rank modifier, such as clinical, research, medical, library/research, and admin/technical

5th character: indicates a status modifier, such as interim, acting, visiting, and emeritus.

POSITION
CLASS

POSITION

JOBS

Click Next to
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Position

A **Position** is defined as an approved, budgeted slot held by a unit for which an employee can be recruited and hired. Positions may be active (filled or vacant), inactive, cancelled or frozen. A position can have either one job with a single incumbent associated with it, or it can be "pooled" and have many jobs with multiple incumbents associated with it.

A Position contains additional information, such as:

- Title
- Classification
- Employee class
- Position budget
- Exempt status

POSITION
CLASS

POSITION

JOBS

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Jobs

A job is attained when a position is filled by an individual that is set up as an employee in Banner. Therefore, before a job can be created, there must be both an employee and a corresponding position in Banner. This level is most closely associated with appointments in the University's current environment. An employee may have multiple jobs within one or more positions. A job contains additional information, such as:

- Job begin date
- Title
- FTE
- Employee Class
- Pay Rate
- Salary Range
- Suffix

POSITION
CLASS

POSITION

JOBS

Click Next to
continue

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ADOBE CAPTIVATE™

Employee Example:**Name:** Frank Smith**Physical Campus:** Urbana**Chart of Accounts:** 9 (University Administration)**Home Org:** 9-904000 (Assoc VP Human Resources)**Pay ID:** Monthly (MN)**Position:** U81177**Job:** U81177-00**Employee Group:** Academic Professional (B)**Employee Class:** (BA) Academic Professional
12-month, benefit eligible

PAY ID

POSITION
CLASSEMPLOYEE
GROUP

POSITION

EMPLOYEE
CLASS

JOBS

PAY ID

EMPLOYEE CLASS

POSITION CLASS

POSITION

JOBS

**Click Next to
continue**

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Ch. 3 - Entering Data Into Banner

Users will learn about concepts pertaining to:

- Banner history
- Frequently used Banner forms
- Terminology related to Banner.

Click Next
to continue

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The Banner Enterprise Resource Planning System:

The University of Illinois selected **Banner** as the UI-Integrate software system.



An **Enterprise Resource Planning (ERP)** system is a suite of integrated programs designed to meet administrative and organizational needs. For higher education, the integrated suite includes Student Administration, Human Resources, and Financial System Applications.

Banner is a comprehensive suite of information systems that uses graphical-user-interface (gui) technology to integrate Student, Human Resources, and Finance Administration modules.

SunGard Higher Education [developer of Banner] provides software, strategic consulting, and technology management services to colleges and universities. They help more than 1,600 institutions worldwide strengthen institutional performance by improving constituent services, increasing accountability, and enhancing the education experience.

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Frequently used Banner forms:

PPAIDEN

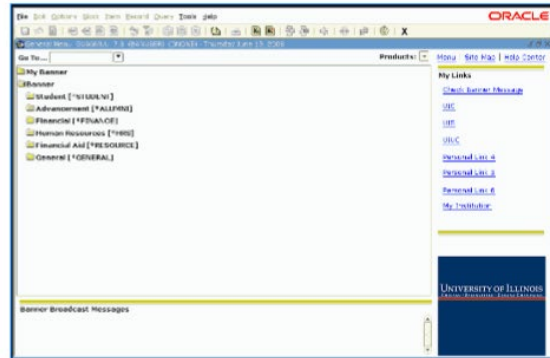
PEAEMPL

NBAPOSN

NBAJOBS

Over the next four screens, we will be covering frequently used banner forms.

- PPAIDEN
- PEAEMPL
- NBAPOSN
- NBAJOBS



Banner forms are essentially input mechanisms for entering data into the Banner database.

Hover your mouse over the image to see the form in detail

Click Next to continue

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NEXT >



ADOBE CAPTIVATE™

Frequently used Banner forms:



Over the next few
frequent

- PPAIDEN

- PEAEMPL

- NBAPOSN

- NBAJOBS



entering data into the Banner database.

Hover your mouse over the image to see the form in detail

Click Next to
continue

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ADOBE CAPTIVATE™

Frequently Used Banner Forms: PPAIDEN



- A form in Banner that contains biographical and demographical data.
- Contains employees' official mailing addresses (which the University, CMS, and SURS use to send out important documents).
- Much of the data in **PPAIDEN** is contributed from the employee via

If this were the only form that was completed, only biographical and demographical data would be available.

Hover your mouse over the image to see the form in detail

Click Next to continue

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ADOBE CAPTIVATE™

Frequently Used Banner Forms: PPAIDEN

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and
doc

• Muc
cont

demographical data would be available.

Hover your mouse over the image to see the form in detail

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ADOBE CAPTIVATE™

Frequently Used Banner Forms: PEAEMPL

PPAIDEN

PEAEMPL

NBAPOSN

NBAJOBS

- This form provides information about the employee as a whole, not based on any one job they may hold.
- For instance, the employee's home department, benefits category, [whether they are eligible for benefits, and what kind], and leave category [whether they are eligible for leave and what kind] can be found on this form.

The screenshot shows the PEAEMPL form in the Oracle HR system. The form is titled "General Employee" and contains several sections for data entry. The "Employee Status" section includes fields for Employee Status, Employee Class, Employee Group, Leave Category, and Benefit Category. The "Home Department" section includes fields for Home Department, Check Distribution, and District or Division. The "Service Dates" section includes fields for Current Hire, Original Hire, Adjusted Service, Seniority, First Work Date, and Last Work Date. The "Termination" section includes fields for Reason and Termination Date. The "Leave of Absence" section includes fields for Reason, Begin Date, and End Date. The "Hiring Location" section includes fields for Location, College, and Campus. The form is displayed in a web browser window with the Oracle logo in the top right corner.

Hover your mouse over the image to see the form in detail

Click Next to continue

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NEXT >



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Frequently Used Banner Forms: PEAEMPL

- This is the employee's primary department.

- For information on the different kinds of departments, see the HR Front End Training manual.

Employee: PEAEMPL 7.2 (BANPROD) (0NONE)

ID: Frank Smith

General Employee United States Regulatory Canadian Regulatory

Employee Status: Active

Employee Class: BA Acad/Pro 12mth Ben Elig

Employee Group: B Academic Professionals

Leave Category: Y3 12/12 mth 2 FH 25

Benefit Category: M1 FT Monthly All Benefits

COA Organization

Home Department: 9 904030 Assoc VP Human Resources

Check Distribution: 9 904030 Assoc VP Human Resources

District or Division: U UIUC Urbana / Champaign

Service Dates

Current Hire: 21-AUG-1999

Original Hire: 21-AUG-1999

Adjusted Service: 21-AUG-1999

Seniority: 21-AUG-1999

First Work Date: 21-AUG-1999

Last Work Date:

Termination

Reason:

Termination Date:

Leave of Absence

Reason:

Begin Date:

End Date:

Hiring Location

Location:

College:

Campus:

Hover your mouse over the image to see the form in detail

Click Next to continue

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ADOBE CAPTIVATE™

Frequently Used Banner Forms: NBAPOSN

PPAIDEN

PEAEMPL

NBAPOSN

NBAJOBS

- A form in Banner that provides position information.
- It categorizes people within an employee group [which relates to e-classes]

Some elements pertaining to this form are:

- Frank's Employee Class
- Frank's Position Title and Position Class

Differentiating a position from a job:

The NBAPOSN [position] form remains empty until a person fills that position. Once the position is filled, the job now exists.

Hover your mouse over the image to see the form in detail

Click Next to continue

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UNIVERSITY

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Frequently Used Banner Forms: NBAPOSN

Position Definition: NBAPOSN, 7.3.0.1 (BANPROD) (0NONE)

Position Number: U81177

Position Status: Active Type: Single
Position Begin Date: 01-JUL-2003 Position End Date: COA: 9

Compensation and Classification

Position Class: RALHA COORD HR TRNPD Appointment Percent: 100.00
Position Title: TRAINING PROG COORD
Employee Class: EA Acad/Pro 12mth Ben Elig
Job Progression: ☒ Exempt Indicator
Salary Group: 2009 Academic ☐ Accrue Seniority
Salary Table: AA
Salary Grade: LNDFO
Salary Step: 0
Range Low: 1.00
Range Midpoint: 1.00
Range High: 999,999.00
Step Value:
Reports To:
Work Schedule:
Probationary Period:
Bargaining Unit:
Job Location:

position is filled, the job now exists.

Hover your mouse over the image to see the form in detail

Click Next to continue

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Frequently Used Banner Forms: NBAJOBS

PPAIDEN

PEAEMPL

NBAPOSN

NBAJOBS

- A form in Banner that provides job information.
- The following elements are in the NBAJOBS form:
 - Details pertaining to the job
 - Account from which Frank is paid

The screenshot shows the NBAJOBS form in the Oracle HR Front End Foundations application. The form is titled "Employee Job: NBAJOBS 7.1.6.3 (BANNER) (Online)". It contains various fields for job information, including ID, Position, Suffix, Last Paid Date, Query Date, Begin Date, End Date, Job Type, COA, Increase NHI and DD, Eligible Date, Deferred Balance, Probationary Period, Probationary Begin Date, Probationary End Date, Encumbering Data, Salary Encumbrance, Fringe Encumbrance, Total Encumbrance Hours, Contract Start, Contract End, and Total Contract Hours. The form is organized into sections with tabs for "New Job", "Job Data", "Job History", "Job Information", "Job Encumbrance", "Job Probation", "Job Contract", and "Job Label".

Hover your mouse over the image to see the form in detail

Click Next to continue

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ADOBE CAPTIVATE™

Frequently Used Banner Forms: NBAJOBS

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- infor

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- De

- Ac

Employee Jobs NBAJOBS 7.3.0.3 (BANPROD) (ONONE)

ID: Position: U81177 Suffix: 00 Last Paid Date: 15-JUL-2008 Query Date: 01-JUL-2008

Base Job Job Detail Payroll Default Deferred Pay Miscellaneous Excluded Deductions/... Default Earnings Work Schedules Job Labor Distribution

Effective Date: 01-JUL-2008 Personnel Date: 01-JUL-2008 Status: Active Title: TRAINING PROG COORD Job FTE: 1.000 Appointment Percent: 100.00 Encumbrance Hours: Encumbrance Indicator: System Calculated Hours per Day: 8.00 Employee Class: BA Acad/Prv 12mth Ben Elig Leave Category: Y3 12/12 mth 2 FH 25 Change Reason: LD031 Labor Distribution Change Employer Code: UI University of Illinois

Pay Plan Group: 2008 Grade: UNDFD Table: AA Step: 0

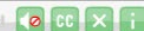
Compensation Rate: 26.846703 Hours per Pay: 173.33 Assign Salary: 5,000.03 Factor: 12.0 Pays: 12.0 Annual Salary: X0,000.00

Hover your mouse over the image to see the form in detail

Click Next to continue

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Employee Example:

Name: Frank Smith

Physical Campus: Urbana

Chart of Accounts: 9 (University Administration)

Home Org: 9-904000 (Assoc VP Human Resources)

Pay ID: Monthly (MN)

Employee Group: Academic Professional (B)

Employee Class: (BA) Academic professional 12-month,
benefit eligible

Position: U81177

Job: U81177-00

PPAIDEN

PEAEMPL

NBAPOSN

NBAJOBS

Information about Frank as an employee, his jobs, benefits, etc. is found on several different forms in Banner. In the next chapter we will look at the HR Front End Application where all of this information will be consolidated to one location.

Click Next to
continue

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Additional Terminology Related to Banner:

Banner uses several dates for different purposes. Some common dates used in Banner are:

- **Last Paid Date:** Date that Frank last received a check from the University. The date of the most recent payroll for which the employee was paid.
- **Personnel Date:** The date a transaction should go into effect for Frank. For example: The date Frank's pay increase will go into effect. The date the job change occurred

Effective Date: The date that the change becomes effective in Banner. This is the date the job change is effective for payroll purposes. For Example: when a transaction is submitted for Frank, it is the date that Banner assigns as the date the change becomes effective.



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Ch.4 - The HR Front End Application

Users will learn about concepts pertaining to:

- Why the HR Front End was created
- Locating data in the HR Front End
- Transitioning from Banner to the HR Front End

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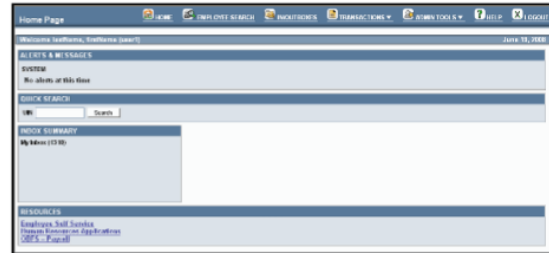
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The HR Front End Application:

The HR Front End was created to simplify the processing of transactions that are performed by HR employees at the University of Illinois. It condenses information [taken from several forms] in Banner and condenses it to one location in the HR Front End.



The HR Front End will not be replacing Banner. However, many of the transactions that are currently being performed in Banner will now be performed in the HR Front End. The information will be pulled from Banner and to the HR Front End and then fed back into Banner from the HR Front End.

Hover your mouse over the image to zoom in on it.

Click Next to continue

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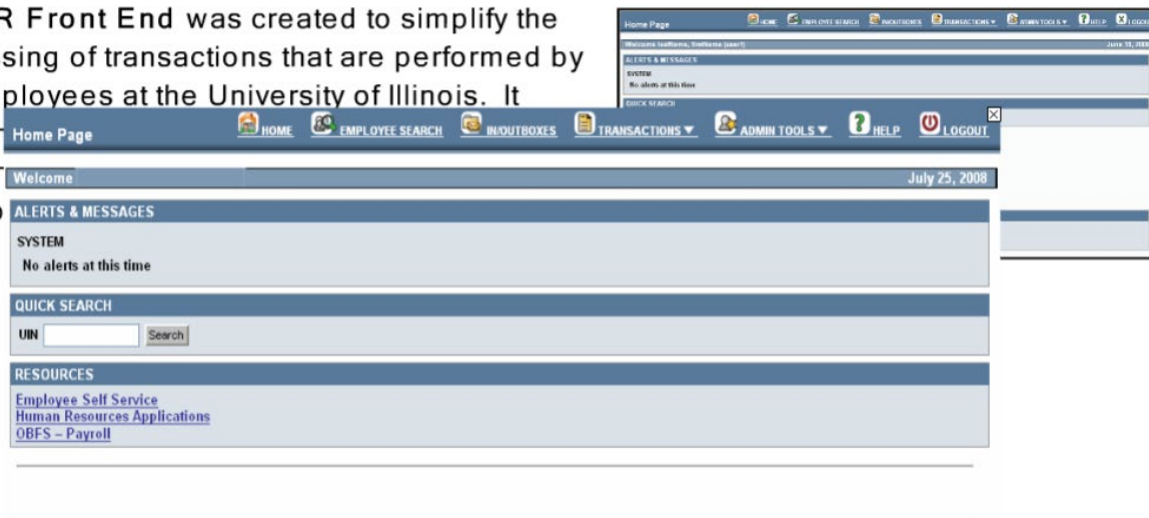
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ADOBE CAPTIVATE™

The HR Front End Application:

The HR Front End was created to simplify the processing of transactions that are performed by HR employees at the University of Illinois. It is a web-based application that is used by HR employees in the University of Illinois. It is a web-based application that is used by HR employees in the University of Illinois.



Hover your mouse over the image to zoom in on it.

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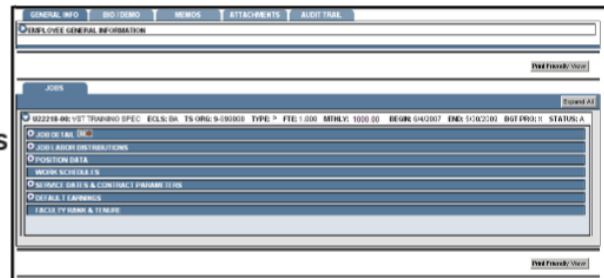
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The HR Front End Features:

- Built-in Business rules
- Business processing
- Different ways that users can view employees:
 - Employee Record View (ERV)
 - Timeline View
- Document attachment feature - which enables users to also view documents that they have attached
- Edits
- Online help tool
- Robust routing and security features



Hover your mouse over the image to zoom in on it.

Click Next to continue

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The HR Front End Features:

- Built-in Business rules

- Business processing

- Disposition

- Job

- Job

- Disposition

- Job

- Job

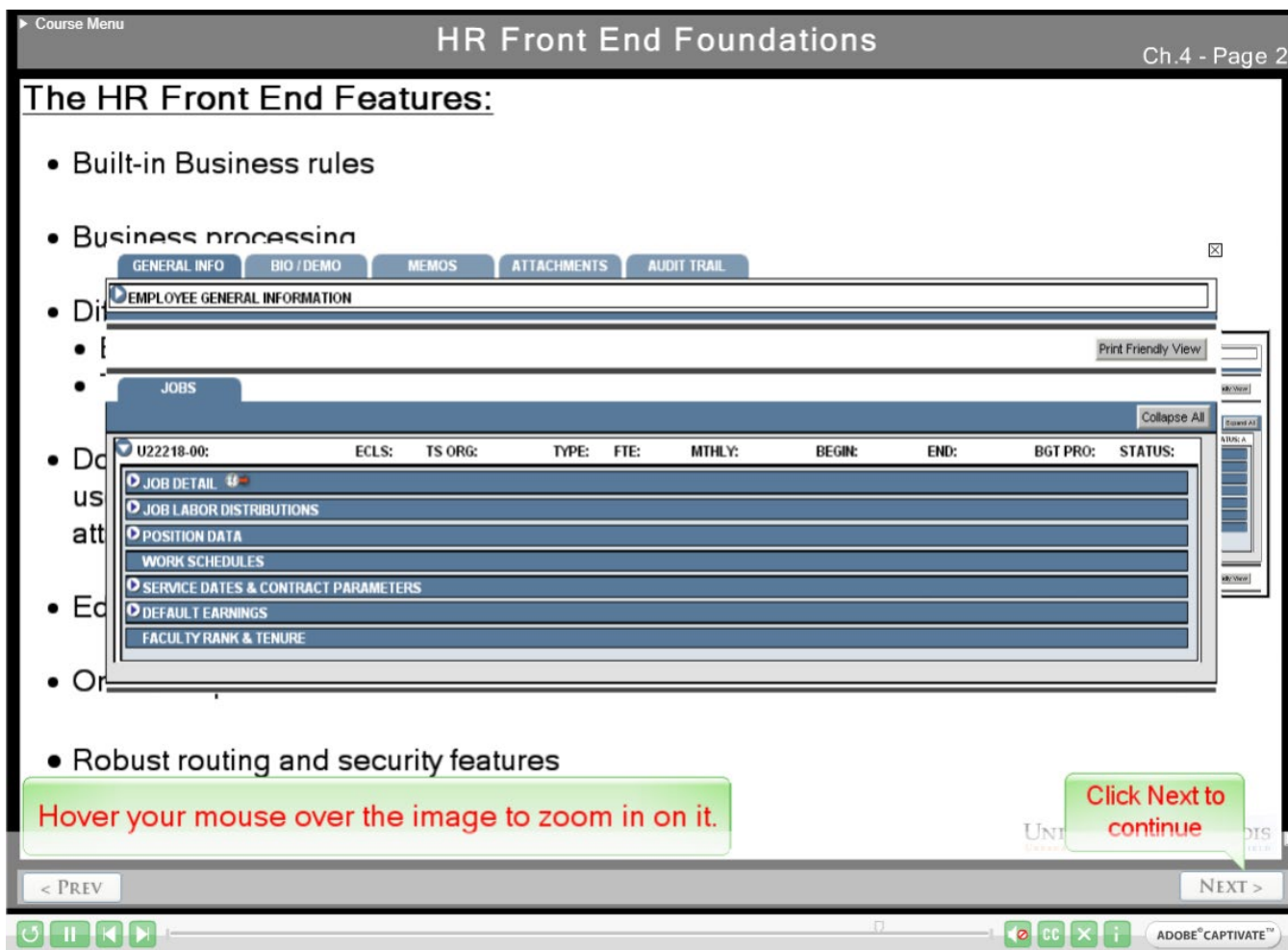
- Job

- Job

- Robust routing and security features

Hover your mouse over the image to zoom in on it.

Click Next to continue



The HR Front End:

Information that is in the PPAIDEN form in banner [biographical and demographical data] will be located in the **bio/demo** tab in the HR Front End.

The diagram illustrates the relationship between the PPAIDEN form and the HR Front End interface. At the top, four tabs are shown: PPAIDEN, PEAEMPL, NBAPOSN, and NBAJOBS. The PPAIDEN tab is highlighted with a red border and a red arrow pointing down to the 'BIO / DEMO' tab in the HR Front End interface. The HR Front End interface shows a list of tabs: GENERAL INFO, BIO / DEMO, MEMOS, ATTACHMENTS, and AUDIT TRAIL. The BIO / DEMO tab is selected, and its contents are displayed in a table with the following rows: EMPLOYEE BIO DEMO INFORMATION, ADDRESSES, EMERGENCY CONTACT INFORMATION, EDUCATION, WORK HISTORY, LICENSES, CERTIFICATIONS, DRIVERS LICENSES, and LANGUAGES.

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The HR Front End:

Employee information that is found in the PEAEMPL form in Banner will be located in the **General Info** Tab in the HR Front End.

The screenshot displays the HR Front End interface with four tabs: PPAIDEN, PEAEMPL (highlighted with a red box), NBAPOSN, and NBAJOBS. Below the tabs is the 'EMPLOYEE GENERAL INFORMATION' form. The form includes fields for NAME (LAST, FIRST, MIDDLE), EMPLOYEE STATUS (Active), HOME CHART ORG (9 - University of Illinois - Admin), ORGANIZATION (904000 - Assoc VP Human Resources), CAMPUS (C - Chicago), HIRE DATES (CURRENT: 8/21/1999, ORIGINAL: 8/21/1999), SERVICE DATES (ADJ SERVICE: 8/21/1999, AWARD: 8/21/1999), TERMINATION (LAST WK DAY, TERM DATE, REASON), E-CLASS (BA - AcadPro 12mth Ben Elig), BENEFIT CATEGORY (M1 - FT Monthly All Benefits), RETIREMENT CODE (RS), CITIZENSHIP (US - Citizen), VISA TYPE (01 - No Current Visa), EXP DATE, and LEAVE OF ABSENCE (BEGIN DATE, END DATE, REASON).

Click Next to
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UNIVERSITY OF ILLINOIS
CHICAGO

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ADOBE CAPTIVATE™

The HR Front End:

Position information [found in NBAPOSN in Banner] will be in the position data accordion [under the Jobs tab] in the HR Front End.

PPAIDEN PEAEMPL **NBAPOSN** NBAJOBS

JOBS

UB1177-00: TRAINING PROG COORD ECLS: BA TS ORIG: 9-904000 TYPE: P FTE: 1.000 MTHLY: 904000 BEGR: 12/16/2007 BGT PRD: R STATUS: A

POSITION DATA

CHANGE DATE: POSITION #: 12/17/2007 UB1177

POSITION CLASS: RAUHA - COORD HR TRNPD POSITION TITLE: TRAINING PROG COORD POSITION EMPLOYEE CLASS: BA - AcadPro 12mth Ben Elig

TYPE: S - Single POSITION BEGIN DATE: 7/1/2003 PAPE #: 49919 - COORDINATOR

SALARY GROUP: 2000 TABLE: AA GRADE: UNDFD STEP: SALARY RANGE LOW: 1.0 MID: 1.0 HIGH: 999999.0

BARGAINING UNIT: NONE - NONE PROB PERIOD: ACCRUE SENIORITY: N - No JOB PROGRESSION: No Job Progression

POSITION DESCRIPTORS: BLANK

BUDGET PROFILE: Select One BUDGET COA: 9 BUDGET ORG: 904000 - Assoc VP Human Resources

POSITION LABOR DISTRIBUTION								
COA	Index	Fund	Organization	Account	Program	Activity	Location	Percent
9		100000	904000	211300	904000			100.0
TOTALS								100.0

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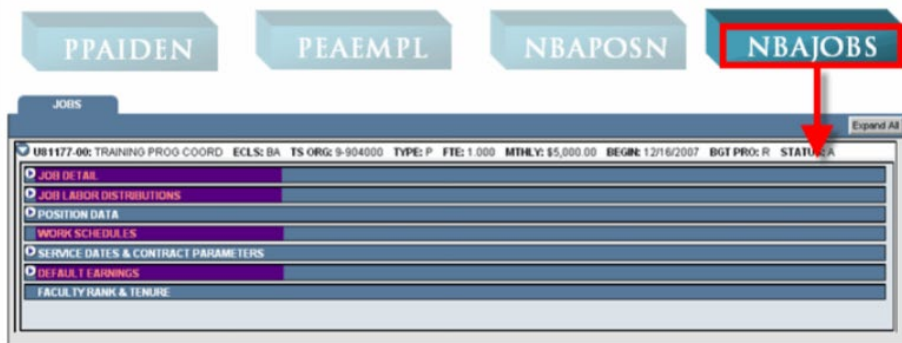
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The HR Front End:

Job information [that is found in NBAJOBS in Banner] will be in the **Jobs** tab in the HR Front End.



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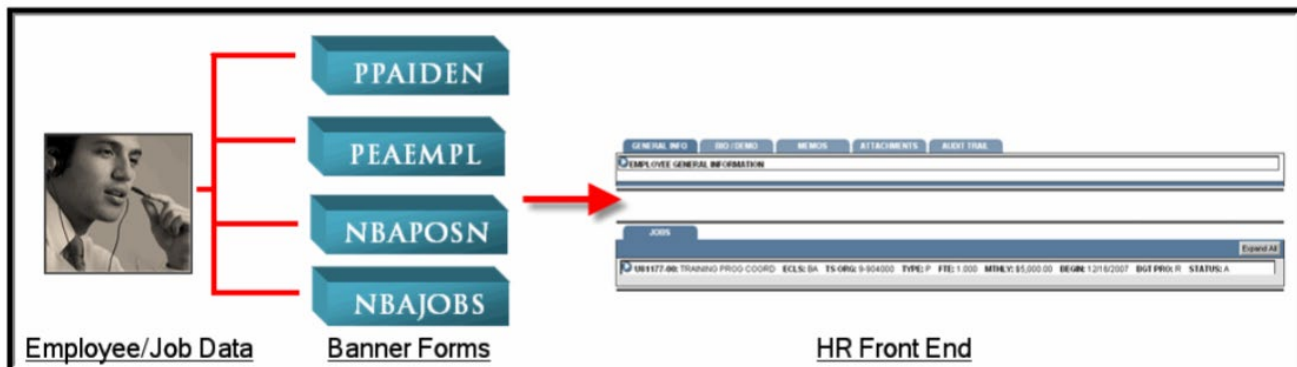
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The HR Front End:

The HR Front End takes the Employee and Job Data from Banner (where information is located in various places), and brings the information together in one convenient location.



Click Next
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Course Concept Review

The following concepts were covered in this course:

CH1. University Structure

Users learned about concepts pertaining to:

- Physical campuses
- University Administration
- Global Campus
- Accounting elements of the C-FOAPAL structure
- Organizations

CH2. University Employees:

Users learned about concepts pertaining to:

- The HR Pay ID hierarchy structure
- Categorizing employees
- Pay id
- Employee groups
- Employee classes and classifications

CH3. Entering Data Into Banner:

Users learned about concepts pertaining to:

- Banner history
- Frequently used Banner forms
- Terminology related to Banner

CH4. The HR Front End Application:

Users learned about concepts pertaining to:

- Why the application was created
- Locating data in the application
- Transitioning from Banner to the HR Front End Application.

You have reached the conclusion of the course.
to retake the course. To begin again, click the start button.

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