

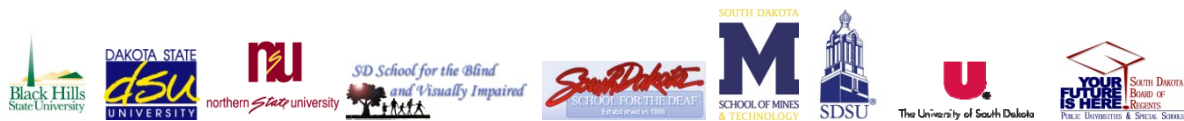
# HUMAN RESOURCES INFORMATION SYSTEM

SOUTH DAKOTA BOARD OF REGENTS  
HUMAN RESOURCES/FINANCE INFORMATION SYSTEMS

## General Banner HR Menu Procedures Manual

Version 1.1

Updated 03/12/2010



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## Introduction

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### Overview

Welcome to the South Dakota Board of Regents Human Resource Information System. This chapter explains the general HR Banner Navigation in the Banner Human Resources System. This section will not contain any information for the On-line Employment System (PeopleAdmin Applicant Tracking and Position Description). The goal of this manual is to provide an overview of the Banner Human Resources module processes, menus, and terminology. Separate manuals detailing the topics found within the Human Resources module are available and a subset of the overall procedures manuals. The manuals contain detailed information about the forms and processes required for set up and day-to-day operations.

This manual will identify the features and functions of the Human Resources system, identify and describe in general the primary forms in the Human Resources system, and describe some of the additional services provided by the Human Resources system. Overall this manual provides a high-level general overview.

### Intended Audience

The intended audience includes any individual using the HR Banner system.

### Documentation and Disclaimer

All information that is entered into this system must be free of discriminatory intent. All information used should be reflective of the position or work required or related information. It is the policy of the South Dakota Board of Regents to take affirmative action and to ensure that all employment practices are free of discrimination. In addition, the Board of Regents fully supports incorporation of non-discrimination and Affirmative Action rules and regulations into all of its employment practices. South Dakota Board of Regents is an equal employment opportunity employer.

## **Glossary**

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Please review the functional manuals for specifics on glossary terms impacting the direct area.

## **Rule, Validation, Maintenance Forms**

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Please review the functional manuals for specifics on Rule and Validation Forms.

## Business Process

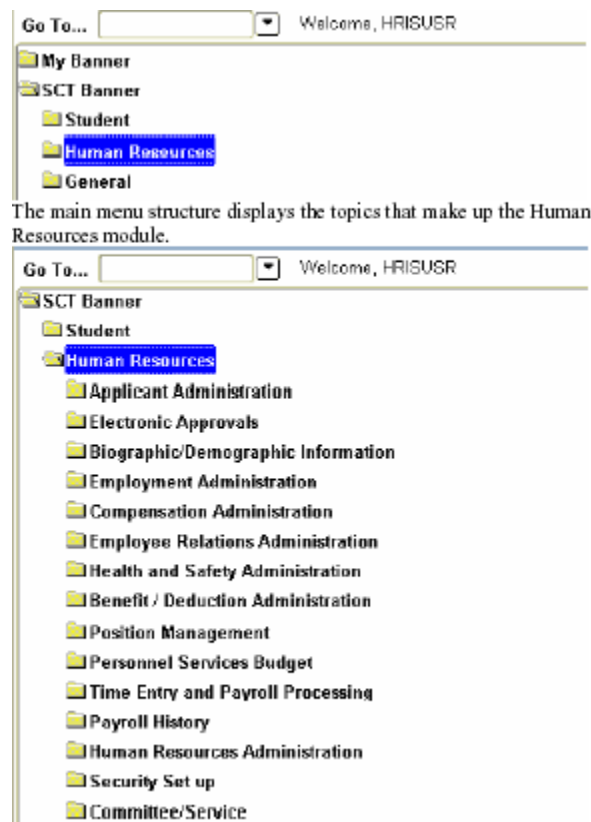
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### I. General Banner Menu

#### A. General Navigation

The SCT Banner Human Resources main menu can be used to select menus, forms, jobs, and QuickFlows. The main menu shows the various levels of menus and submenus available. Menus are nested in folders. The user can navigate through SCT Banner by expanding these menus. Personal menus can be tailored to individual needs.

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



#### B. Applicant Administration Menu

The Applicant Administration module creates and maintains records on applicants for existing positions. SDBOR will not be using this module due to On-Line Employment System.

#### C. Electronic Approvals Menu

The Electronic Approvals module is designed to accommodate a more efficient approval signature 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, and
- provide an audit trail of all approval/disapproval history.

### 1. Benefits

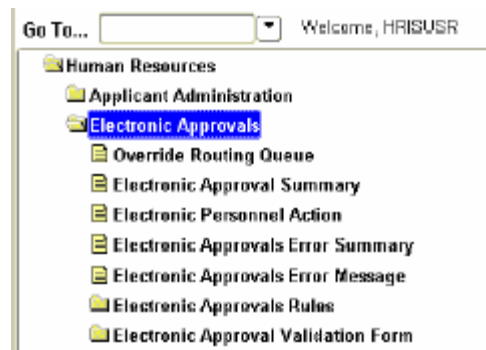
Users can track their items requiring approval through an online form. Approvers can easily view items that need approval signatures and add their own comments to an action.

### 2. Design

The design of the Electronic Approvals functionality with SCT Banner Human Resources is based on the current routing of a paper Personnel Action Form (PAF).

Electronic Approvals allows the user 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.

### 3. Menu



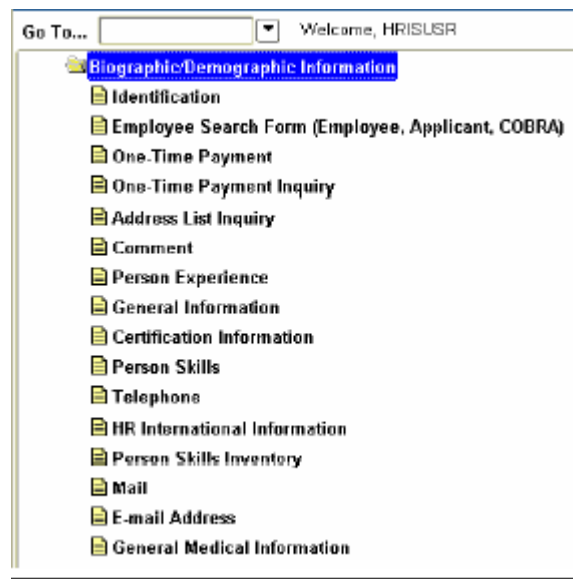
### 4. Primary Forms

- a. Electronic Approval Summary Form (NOAAPSM) - enables approvers to view minimal information about an Electronic Approvals transaction for which they are required to take action.
- b. Electronic Personnel Action Form (NOAEPAF) - provides your institution with an electronic version of the Personnel Action Form.

### D. Biographic/Demographic Information Menu

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.

## 1. Menu



## 2. Primary Form

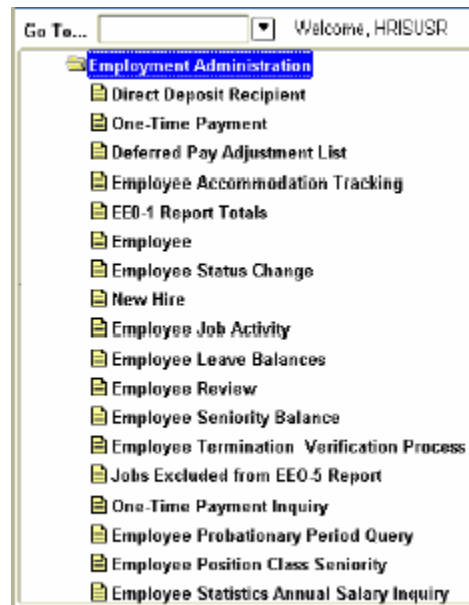
Identification Form (PPAIDEN) - enables the entry of basic biographic/demographic data about anyone associated with the institution – direct or indirect.

## E. Employment Administration Menu

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



## 1. Menu



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

## 2. Primary Form

Employee Form (PEAEMPL) - Establishes employee information, including data on status, service dates, leave and benefit categories, leaves, and terminations.

## F. Compensation Administration Menu

The Compensation Administration module supports compensation information for an employee.

## 1. Menu



## 2. Primary Form

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 description, start and end dates, status, hours, and

salary information. NBAJOBS allows future-dated changes to be entered for job information. Note: At least one active job assignment must exist for an employee in order for payroll to be processed.

## G. Employee Relations Administration Menu

The Employee Relations module enables the user 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.

### 1. Menu



### 2. Primary forms

- a. Employee/Job Labor Relations Form (PEABARG) - Collects and displays information on an employee's bargaining units and the jobs with which they are associated.
- b. Employee Relations Grievance Form (PZAGREV) - Collects data on employee grievances. PZAGREV is a SD modified form (formally PEAGREV).

## H. Health and Safety Administration Menu

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

## 1. Menu



## 2. Primary Forms

- a. Health and Safety Incident Form (PEAHSIN) - Maintains information on health and safety related incidents.
- b. Position Hazard Form (PEAPNHZ) - Allows the institution to associate known hazardous materials, activities, or locations, with a specified position.

## I. Benefit/Deductions Administration Menu

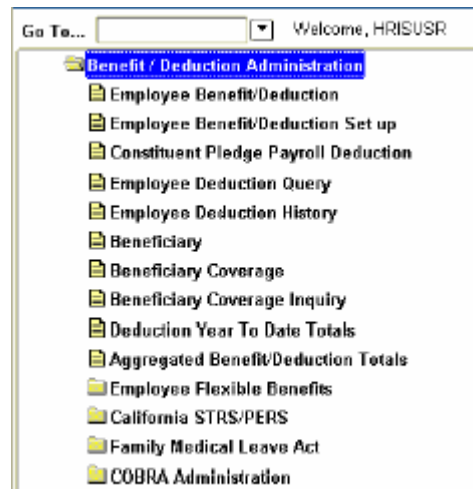
### 1. Introduction

The Benefit/Deduction Administration module offers four benefit capabilities for which an organization can outline and document.

### 2. Benefit/Description

- a. Benefit Definition - Provides for an unlimited number of benefits and benefit plans using a variety of calculation methods and flexible rule structures.
- b. Eligibility Administration - Enables the user to control the benefit programs in which an employee may participate. SCT Banner Human Resources eligibility administration functions can group the benefits into an unlimited number of benefit/deduction categories, and allows the organization to set up eligibility for those programs and cross bargaining unit, organizational, and functional boundaries, if needed.
- c. Flexible benefit administration - Enables the organization to allow employees to design creative benefit packages that meet their individual needs while staying within cost guidelines. Will not be used by SDBOR.
- d. COBRA administration - Automates the vast majority of COBRA calculations, correspondences, and billing transactions. Will not be used by SDBOR.

### 3. Menu



#### 4. Primary Forms

- a. 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.
- b. Employee Benefit/Deduction Setup Form (PDADBSU) - Enables an experienced user to quickly perform an employee's initial deduction setup.
- c. Beneficiary Form (PDABENE) - Captures information on the beneficiaries and dependents of employees for administrative purposes.
- d. Beneficiary Coverage Form (PDABCOV) - Allows for the viewing, adding, and deleting of dependents and beneficiaries by employee for each benefit.

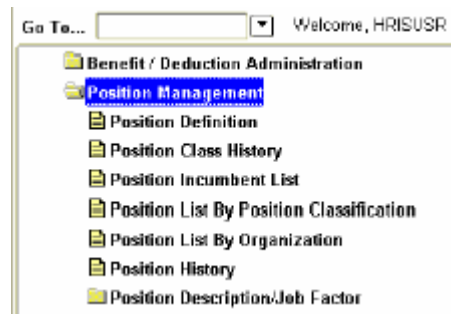
#### J. Position Management Menu

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

Position Control: Enables the organization to define job families, positions, and position characteristics, job descriptions, and minimum qualifications. Budget and available full-time equivalents (FTE) are checked on every employment and salary action to ensure that funds and positions are available.

Position Budgeting: Provide for the definition and monitoring of salary, premium earnings, and fringe benefits budgets. An unlimited number of budgeting methods and "what-if" scenarios are supported.

## 1. Menu



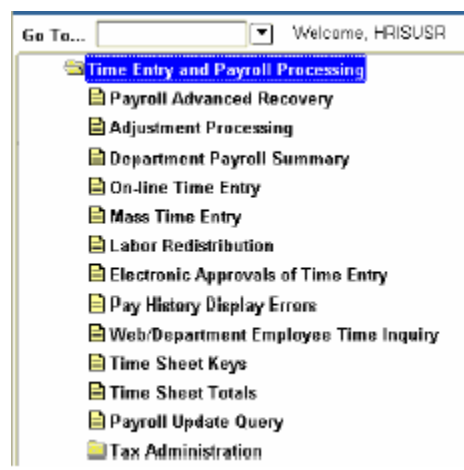
## 2. Primary Forms

- a. Position Definition Form (NBAPOSN) - Enables organization to define all positions.
- b. 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.

## K. Time Entry and Payroll Processing Menu

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

### 1. Menu



## 2. Primary Forms

- a. Online Time Entry Form (PHAHOUR) - Enables the payroll office to enter hours an employee works in a specified pay period. Captures any hours defaulted from the job record to allow for exception-only time entry.

- b. Mass Time Entry Form (PHAMTIM) - Enables the entry or display of hours for a number of employees.

### **L. 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.

### **M. Self Service Employees**

Self Service Employees is a tool that enables the employees of an institution to access certain areas of the records through a secured portal that is validated through 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 eliminating the need for Human Resources professionals to assist or intervene in every payroll and benefits/deductions inquiry or change.

### **N. Self Service Time Entry**

In concert, the Self Service Employees and SCT Banner Human Resources systems enable employees to report their time on the Web and to submit the time transactions (time sheets or leave requests) directly from the Web to the SCT Banner HR system. After a time transaction is submitted to the system, it can go through an electronic approvals process.

During the approvals process, the employee receives feedback on the Web regarding the approval status of the time transaction or any changes made to that transaction by approvers. After the time transaction is approved, it continues through the normal payroll process. This functionality results in efficient administration of both the time entry process and overall payroll processing procedures.

## **II. Quick Flows**

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

When entering a QuickFlow name on the QuickFlow Form (GUAQFLW) the system executes the first form defined in the QuickFlow list then 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: The user can only execute QuickFlow lists that were defined using the GTVQUIK and GUAQUIK forms.

First, use the QuickFlow Code Validation Form (GTVQUIK) to create the name of the QuickFlow. Then, use the QuickFlow Definitions Form (GUAQUIK) to add and remove forms

on the QuickFlow. Use the arrow icons in the center of the screen to add or remove forms on the Current Forms list. Note: The user can scroll through the list of available forms or use the Find function to locate specific forms.

Create a QuickFlow for a process that requires many different forms to be completed. Complete the process below to create a QuickFlow.

- A. Access the QuickFlow Code Validation Form (GTVQUIK).
- B. Select the Insert Record function.
- C. Enter a QuickFlow code in the QuickFlow field. The code can be up to 4 characters.
- D. Enter a description in the Description field of the QuickFlow code. The description can be up to 30 characters.
- E. Click the Save icon.
- F. Click the Exit icon.
- G. Access the QuickFlow Definition Form (GUAQUIK).
- H. Enter the code in the QuickFlow field that was just created on the QuickFlow Code Validation Form (GTVQUIK).
- I. Select the Next Block function.
- J. Click the Insert or Remove arrow icons in the center of the screen to add or remove forms on the Current Forms list. Warning: Make sure to enter the forms in the order they should be accessed to achieve the task required. The Find function to locate the form can be used by entering the search information, including “%”, the SCT Banner wild card, to pull up the form names. Scroll through the list of form names in the Available Forms section.
- K. Click the Save icon.
- L. Click the Exit icon.
- M. Access the QuickFlow form (GUAQFLW).
- N. Enter the name of the QuickFlow process that you created in Step 3 in the QuickFlow field.
- O. Click the Start button.
- P. Exit through each of the forms in the process to return to the QuickFlow form.
- Q. Click the Exit icon.

### **III. Procedure Manual Template and Overview for the Functional Manuals**

The Banner HR Procedure Manual chapters will include the following sections:

#### **A. Introduction**

This section will provide a general overview of the module (chapter) being reviewed. There will be bulleted points that will provide key points of what the user will find from reviewing the chapter or module.

#### **B. Glossary**

If applicable, this section will include terminology that will be used in the module (chapter) to provide core conceptualization of the term. This allows the users to use the term as intended within the module and within the processes defined.

### **C. Rule and Validation Form Overview**

This section provides a high overview of the rules or validation tables that will be used in the module.

### **D. Business Process Analysis**

This section will provide the processes that SDBOR has defined for use in the organization. This section is the key section on the identified steps for the processes required for SDBOR.

### **E. Business Query and Reporting**

This section identifies any inquiry forms or reporting forms that can be used in this module.

### **F. Other Information**

#### **1. Rule and Validation Form Initial Setup and Information – As Applicable**

This section provides how the rule and validation forms are set up during implementation as well as providing information on how to update the form if applicable. This section is geared at identifying the primary owner of the form and security maintenance.

#### **2. Rule and Validation Variables Defined – As Applicable**

This section outlines the documented and defined variables that were created. These variables will be placed within banner a defined in the field help on the local tab.

#### **3. Business Process Analysis Visio's – As Applicable**

During the implementation process, the HRIS Module and other modules (i.e., budget) identified key processes for the implementation of the HRIS system. These are attached for a fundamental understanding of why the process and why the HRIS system was designed for SDBOR.



## Queries and Reports

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There is nothing to report in this section.

## **Other Information**

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There is nothing to report in this section.