

Banner Finance & HR Newsletter

January 2004, Issue No. 3

The Banner Administrative System

The Banner System is the financial, human resources, and sponsored projects administrative and student system at George Mason University. Banner is used at more than 1,000 colleges and universities across the country. Mason started its Banner implementation in July of 2002. The system consists of four integrated modules: Finance, Human Resources, Sponsored Projects, and Student. Currently, the Finance, Human Resources, and Sponsored Projects systems are fully operational. The conversion of the Student module is now underway, and it will be live for the Fall 2004 semester. The users of Banner span the entire University, including principal investigators, department chairs, administrative staff, and soon students as well.

Banner Finance Module

The Finance module is the official system of financial record for the university. General Accounting submitted Fiscal Year 2003 financial statements to the Board of Visitors and the auditors based on data from the Finance module.

Administrative staff, including General Accounting, Budget, Accounts Payable, Cash Office, Purchasing, and Sponsored Programs, use this module to run the daily financial operations of the university.

Banner Human Resources Module

The Human Resources module is the central repository for all personnel information at the university. Human Resources and department administrative staff use this module to manage the daily personnel operations at the university.

This module allows HR to accomplish functions such as: hiring faculty and classified staff, processing payroll, compensation changes, promotions, leaves, and terminations. Administrative staff in departments process hiring, compensation changes and terminations for wages, adjuncts, and graduate assistants using the electronic approvals system within the

HR module. University employees report time worked and leave taken using the Self Service portion of the HR module.

Banner Sponsored Projects Module

The Sponsored Projects Module contains both descriptive and financial information related to sponsored research. The Office of Sponsored Programs (OSP) utilizes this module to perform functions such as: entering new projects and budgets; billing; and allocating indirect charges.

OSP financial managers, accounts receivable staff, team leaders, grants administrators, and grants specialists use the Sponsored Projects module along with the Finance and HR modules to manage the daily operations of sponsored research.

Banner Student Module

As mentioned, the Student Module will go live for the Fall 2004 semester. Faculty, administrative staff, and students will use the module to perform several functions including: registration, financial aid, student accounts, and internal research and reporting. Students are already using the Self Service portion of the Student module to apply for admission, and financial aid will become active next month.

Banner Interfaces

Banner Self Serve

Banner Self Serve is the web-based ad hoc reporting tool for finance. The data in Self Serve is real time updated from the Finance and Human Resource modules. Self Serve is used by employees to report time and view pay stubs, benefits, and other personal data. Self Serve is the primary method for principal investigators and budget managers to review financial information on their organizations and sponsored projects.

Banner e-Print

Banner e-Print is the web-based standard reports tool for finance and human resource data. e-Print provides dated reports at least once a month.

Banner Internet Native

Banner Internet Native is the back-office web-based system used by finance, human resources, and administrative staff to perform their daily functions.

Oracle Discoverer

Oracle Discoverer is an ad hoc reporting tool for those who need to consolidate a large number of funds or organizations. Another Oracle tool, Cognos, currently is being tested to see if it can supplement Discoverer for the most complex reports.

New Required HR Process

Human Resources now requires that supervisors complete the Exit Alert form when an employee leaves service at GMU. The new process is designed to prevent overpayments that could occur when an employee leaves the university.

Supervisors are still responsible for completing the paperwork associated with the separation, but the Exit Alert is the quickest way to inform Human Resources that an employee is planning to leave Mason, or go on a leave without pay status.

Please go to the following website to access the Exit Alert form:

<http://hr.gmu.edu/forms/exitalert.doc>

Banner Productivity Tip Award

Do you know a great shortcut?

Have a slick way to make Banner work for you?

Submit your ideas for the best productivity tip award. All tips will be featured on the Patriot Project website.

The award winner will receive a \$25 gift certificate to the bookstore from the Banner Training and Communications Advisory Committee.

Members of the Training and Communications Advisory Committee will vote to determine the winner.

Please submit your ideas by February 13th via email to:

Nita Ghosh, nghosh@gmu.edu

Steering Committee Meeting Update

The Steering Committee met on December 19th to discuss priorities with respect to enhancements to Banner Finance and HR. They identified the following as the top three:

- Enhance content in the EA approver email to include additional pertinent information;
- Auto populate the home department organization by position number selected; and
- Build a repository in e~Print that is research specific.

Work will begin immediately on these enhancements, and progress will be tracked in the newsletter. The modification for line item budgeting for sponsored projects is being programmed by a consultant and is expected to be completed by the end of the spring semester. Please contact a steering committee member for more information on these enhancements, comments, or suggestions.

Upcoming Finance & HR Training

Dates:

- 02-09-04: Electronic Approvals: Adjuncts, Grad Assistants, Misc. Pays (FX)
- 02-17-04: Electronic Approvals (PW)
- 02-23-04: Electronic Approvals: Wage, Work Study (FX)
- 02-25-04: Banner Finance Self Service Training (FX)
- 02-25-04: Banner Faculty Finance Self Service Training (FX)

For details and up to date information on training times, locations, and registration, please go to:

<http://www.gmu.edu/PatriotProject/train.html>

Electronic Approvals Reminder

NBA JOBS 'Date' Fields:

- The NBAJOBS Effective Date is the date that the transaction actually happened (e.g., the day the new hire started working).
- The NBAJOBS Personnel Date is the date that the transaction should have happened.

Ideally, these two dates should match.

Please contact Shira Goodfellow if you have any questions at sgoodfel@gmu.edu

Suggestions? Contact one of the Finance & Human Resources Steering Committee Members:

Beth Brock, Assistant Vice President and Controller; Fiscal Services, Committee Chair
Leslie Dyre, Director Finance, HR; College of Arts & Sciences
Raymond D'Souza, Director, Administration and Finance; School of Law
Bill Coester, Administrator; School of Public Policy
Martin Ford, Senior Associate Dean; Graduate School of Education
Carrie Gilotte, Director Database Application Services; Technology Systems Division - ITU
Linda Harber, Assistant Vice President; Human Resources
Ken Hubble, Internal Audit Director; Internal Audit and Management Services
Kathleen Johnson, Director Budget and Personnel; School of Information Technology
Chris Jones, Chair; Environmental Science and Policy
Susan Jones, University Registrar; Registrar
Donna Kidd, Assistant Vice President, Budget and IPR; Budget Office
Ann McGuigan, Director; Office of Sponsored Programs
Dorian Mroz, Director Finance and Administration; College of Visual & Performing Arts
Jennifer Murphy, Director Technology Transfer; Provost Office
Wendy Payton, Director Special Projects, Vice Provost for Academic Affairs; Provost Office
David Roe, Financial Officer; GMU Foundation Inc.
Dave Rossell, Associate Provost for Personnel and Budget; Provost Office
Libby Thompson, Financial Manager; Institute for Conflict Analysis & Resolution