Banner 7.x HR Forms Information

Training Manual

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Banner Pyramid

**Definition**
Payroll calendar
Group of employees with similar characteristics
Tool for tracking and reporting positions
Used in compensation analysis
Budgeted entity assigned to a department
Assign the employee to the position
Distribute costs to one or more departments

**Application to UT**
Salaries Bi-Weekly
Unclassified
Professional Staff / similar to job group codes
Manager
Manager of Payroll Assignment
Labor Distribution

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Chart of Accounts

<table>
<thead>
<tr>
<th>FRS Element</th>
<th>glmap</th>
<th>Account</th>
<th>object</th>
<th>Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accnt Index</td>
<td>Chart</td>
<td>Fund</td>
<td>Organization</td>
<td>Account</td>
</tr>
<tr>
<td>Feature (optional)</td>
<td>Reporting entity</td>
<td>Accnt entity</td>
<td>Budget units departments</td>
<td>Assets</td>
</tr>
</tbody>
</table>

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Page 3

Page 4
## Chart of Accounts

<table>
<thead>
<tr>
<th>Index</th>
<th>Fund</th>
<th>Org.</th>
<th>Account</th>
<th>Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>A10169</td>
<td>100000</td>
<td>10169</td>
<td>User entered</td>
<td>Education- Dean</td>
</tr>
<tr>
<td>R10169</td>
<td>100001</td>
<td>10169</td>
<td>User entered</td>
<td>Education</td>
</tr>
<tr>
<td>L10169</td>
<td>100271</td>
<td>10169</td>
<td>User entered</td>
<td>Education Lab Fees</td>
</tr>
</tbody>
</table>

### Category

- **A + Org**: Unrestricted
- **C + Org**: Scholarships
- **F + Org**: Unrestricted Foundation
- **H + Org**: Overhead
- **L + Org**: Lab Fees
- **R + Org**: Release Time
- **S + Org**: Small Grants
- **T + Org**: Tech Fees
- **U + Org**: URAFP
- **X + Org**: Auxiliary
- **2 + ******: Grant
- **1 + ******: Faculty Start Up/Cost Share
Old  ⟷  New

- Object Code ⟷ Account Code
- Account # ⟷ Index #
- Job Group ⟷ Employee Class
- Civil Service Codes ⟷ Position Class
  - Hay Grades

Accessing MyUT Web Portal

Procedure:
1) Launch Internet Explorer
2) Enter http://myut.utoledo.edu in the address field - click 'go'
3) Type your UTAD user name
4) Type your UTAD password
5) Click the Login button

myUT web portal will open
1. Left click on the groups icon
2. Left click on Banner HR Users Group text.
Banner HR Users Group

Accessing Banner

1. Left Click on the Work Life Tab

3. Featured links to support resources
Banner-Address Information

1. All forms are accessed from the general menu. Enter the XXXXXXX 7 character form name in the Go To field.

PPADDR- Employee Address
PEAEMPL- Employee Information
PEALEAV- Leave Balance
NBAJOBS- Employee Job Information
NBAPOSN- Position Definition
NBAPBUD- Position Budget
NBILST- Employee Job Inquiry
NBIPINC- Position Look Up
NBIPORG- Position List by Org
POCIDEN- Employee Search

2. Type in the form name PPADDR to look up address information. Hit the enter key.
Banner-Address Information

3. Type Rocket # into ID field if known

4. Left click on the black triangle if Rocket # is not known

5. Left click on the Person Search link
6. To start a search, left click on the select query icon.

7. Enter the last name of the person you are searching for. Enter a first name if you want to limit the search. The wildcard % can be used if you are not sure of the spelling. For example, I could use the first three letters of a last name and the wildcard.

8. Left click on the execute query icon.

9. Double left click on the Rocket # of the employee you want to select.
Banner-Address Information

10. Rocket # and name will be displayed in the key block.

11. Click on the next block icon.

Banner-Address Information

12. Review information. You cannot change information. Address type PU is permanent US address, OF office address.

13. Click on the block x to return to the general menu.
Banner-Address Information

1. Enter PEAEMPL into the Go To field
2. Hit the enter key

Banner-Employee Information

1. With the PEAEMPL form open
2. In the ID field, type the Employee ID
3. Go to the next block
4. Review the information
5. When you're done, exit the form
Banner-Leave Information

1. With the PEALEAV form open
2. In the ID field, type the Employee ID
3. Go to the next block
4. Review the information
5. When you're done, exit the form
1. With the NBAJOBS form open
2. In the ID field, type the employee ID
3. In the position field, select the position # and suffix, using the drop down menu
4. Go to the next block
5. Review the position begin date and end date in the general job tab
6. When you're done, exit the form
Banner-Jobs Information

1. Select the Job Detail Tab
2. Review job status, working title, and employee class
3. Review Compensation Information
4. When you're done, exit the form

Banner-Jobs Information

1. Select the Payroll Default
2. Review the information
3. When you're done, exit the form
Banner-Jobs Information

1. Select the Job Labor Distribution tab.
2. Review the index # and account code information.
3. When you're done, exit the form.

Banner-Position Information

Enter NBULST into the Go To field and hit the enter key.
Banner – Position Information

1. Enter employee's Record # or use the drop down to search.
2. Click on the next block icon.
3. Review the position number.
4. Click on the back to exit to the general menu.

Banner – Position Information

Enter NBPINC into the Go To... field. Hit the enter key.
Banner – Position Information

1. With the NBIPINC form open.
2. Enter the date in the Query Date field to determine if the position is open on that date.
3. In the Posn field, type the Position ID or use the drop down menu.
4. Move to the next block.
5. Review the information. A position is defined as open if its status is Active (A), and there are no records listed.
6. When your done, exit the form.

Banner – Position Information

Enter NBAPGN into the Go To field. Hit the enter key.
Banner – Position Information

1. With the NBAPOSN form open
2. Type in the Position number or use the drop down menu
3. Go to the next block
4. Review the information
5. When you're done, exit the form

Enter NBAPOSN into the Go To field. Hit the enter key.
Banner - Position Information

1. With the NBAPBUD form open
2. In the Fiscal Year field, type the year desired
3. Enter the position number in the position field or use the drop down menu
4. Move to the next block

Banner - Position Information

1. Select the Salary Budget Tab
2. Review the information
Banner – Position Information

1. Select the Labor Distribution Tab
2. Review the information
3. When you're done, exit the form a

Web Report Library

Enter
http://reports.utoledo.edu

Enter UTAD ID and Password
Training Account Username:train Password:train

Expand Public Folders (click on + in front of folder)
Web Report Library

Expand Test Folder
(click on + in front of folder)

Expand Human Resources Folder
(click on + in front of folder)

Note: This folder will be in the Public Folder for Production

Web Report Library

Click on General Inquires text

Click on Report you want to run
Web Report Library

Enter parameters then select OK

Click on the export report icon to save it as an acrobat or excel file. Report prints best as an adobe file.

View Report

Personnel Action Forms Home Page

http://humanresources.utoledo.edu/personnelaction

Welcome

If Personnel actions you find all personnel action forms are PDF format that you can see in complete there on screen.

Due to title restrictions on how to complete each form.

Hiring/termination that help you identify the next step in HR process.

You can not help complete for each form. In case you have questions contact us or need help.

Links to information that can help you complete the forms.
Personnel Action Forms Home Page

COA Crosswalk