Banner HR INB

End User Guide

Human Resources Management
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Logging In

Go to myNEU and enter your username and password.

Go to Services and Links and select Internet Native Banner (INB).

Next, Java will launch. On the first window that pops up, check the box next to the ‘Always Trust’ statement and Click the Run button. You will only have to do this once.

Next, the following Security Warning window will appear (it will appear each time you launch Banner INB) and it is important that you always select No. (If you happen to click Yes, you will likely just see a white screen, and you will have to log in again.)
Navigation in Banner INB

Home Page – How to Select a Form

Enter the Form name in the field at the top of the page and press Enter*.

*Note: You will see that on each page of the Banner INB application, there will be a section at the bottom of the page that displays the appropriate search command for that page.

You can also use GUAPMNU (Organize My Banner) to add your common forms to My Banner (your main page).
Toolbar – How to Navigate Forms, Employees and Records

- **Rollback:** Use this once you have finished viewing a Banner (e.g., an employee record or a position record) record, and you would like to look up another record on the same Form.
  - Keyboard shortcut = Shift+F7
- **Next Block:** Once you have selected a record within a Form, you must press this icon to fill in the fields on the Form.
  - Keyboard shortcut = Ctrl+PgDn
- **Exit:** Press this X when you need to leave the Form, and request a new Form. The record value(s), if applicable, which you have been viewing, will automatically be on your next Form. Don’t forget to press the Next Block icon to fill in the fields on your new Form.
  - Keyboard shortcut = Ctrl+Q

**Shortcuts between Forms**

If you’re in a form (for example, NBAJOBS) and press F5, a small drop down will appear across the top of the screen saying Go To...

You can enter any other form name (for example, NBAPOSN) and go there, with the same employee or job information. **Please note:** if you change the employee/job number, and then go back, it will still be the first employee/job number.

To exit, you can press the little ‘x’ in the blue or the one that is normally there and go back to the first page you were on.
Steps to Search for and View Employee Information (using PPAIDEN)

From the Home Page:
1. Enter PPAIDEN
2. Note the Page Command, Press Enter

3. Press the drop down arrow next to the ID field in the ‘Key Block’ section of the page.
   a. The fields in the ‘Key Block’ section of the screen will be blank if you are doing a search right after
      logging on. However, if you arrive at this page having pressed the ‘Rollback’ icon, or have
      navigated to this Form after having viewed an employee record on another Form, you will see
      the fields in the Key Block section already populated with the previous record’s values. Press
      the arrow as seen in the screen shot below and you will be able to search for your next employee
      record.
4. Option List window: Select Person Search. (Note: PPAIDEN stores individuals other than employees, as
   you may see in search results.)
5. Enter a search string, use % as a wildcard.

6. Note the Page Command, press F8

7. Search results: Double click on the ID# of the record you would like to view.
a. Search Results: Which row is the one you want?

i. The search results may display several rows per employee. You may click on any of these rows to navigate to that employee’s PPAIDEN record.

ii. The search results will also display all results of your search. In the example in step 7, you will see there are 2 employees who met the search of “Husky%”, NU and Janice. However you may have search results showing >1 person with the same first and last name (e.g., Jane Smith). In this case you will actually not be able to know, from this page, who is the employee you want to see. There are two other search options in Banner INB:

1. **Use Alternate ID search:** At the start of the search (described in step 3 of this section) you press the arrow next to the ID field in the Key Block, and to do an Alternate Search, choose the Alternate ID Search link in the Options List window. Enter the SSN and press F8.
8. Now that you have selected an employee (the name appears on the Key Block) you must click the 'Next Block' icon in the Toolbar in order to fill in the fields on the Form.

Note: The Forms that store historical transactional information display additional fields in the Key Block section. These fields include a Position Number, and/or Query Date. The pages of this guide that describe those Forms will have specific search instructions in the context of these additional fields.

Viewing Forms and Locating Information

PPAIDEN – Personal Information

Current Identification tab
Alternate Identification tab

*Note: the PeopleSoft Enplid is stored on the page.*

Address tab

*Note: Multiple employee ‘addresses’ are stored in PPAIDEN and they are identified in the Address Type field. Use the scroll bar to view additional Address Types.*
Telephone tab

Note: Multiple employee phone numbers are stored in PPAIDEN and they are identified in the Telephone Type field. Use the scroll bar if there are more than 3 Telephone records for this employee.

Biographical tab
E-Mail tab

Note: Multiple employee email addresses are stored in PPAIDEN and they are identified in the E-mail Type field. Use the scroll bar if there are more than 3 email records for this employee.

Emergency Contacts tab (Not used)
Additional Identification (System use only)

PEAEMPL – Employee Information
- Enter the employee’s NUID or click on the arrow next to the ID field, and select Alternate ID Search
- Enter the employee’s Name or other identifiable information and click Execute on the Query menu

- Double click on the correct employee

- Next Block to view the General Employee tab
1. Employee Class-A code that generalizes the type of employment for the employee
2. Home Organization- A code that describes the department in the University that the employee works
3. Adjusted Service Date-Reflects the date an employee gained full-time, benefits eligible status

United States Regulatory
If you need IPEDS information, it can be found here
NBAJOBS – Pay Information

Note: On each tab in this Form you have access to historical information; therefore you must select the ‘as of’ date before clicking on the ‘Next Block’ icon. This is found in the Query Date field, on the Key Block section. The earlier your Query Date, the more historical rows you will see displayed. (The earliest date in banner is 7/1/10).

- To change the Query Date on this screen, you must first press Rollback. Then select the new Query Date and press Next Block.

Note: This Form has additional search fields in the Key Block section, and all must be filled in to view the NBAJOBS information. Once you have selected an employee, you must then select which Position you want to view for that employee.

- Click on the arrow next to the Position field, and select the List of Employee’s Jobs from the Option List.

See next page for the Position search results.
Position Search Results: Click on the Position Number

![Position Search Results Image](image-url)

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Job Status</th>
<th>Description</th>
<th>Employee Class</th>
<th>Pay ID</th>
<th>COA</th>
<th>Organization</th>
<th>Job Change Reason</th>
<th>Employer</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-JAN-2012</td>
<td>Active</td>
<td>Administrative Manager</td>
<td>Act</td>
<td>SM</td>
<td>000100</td>
<td>PM/DEV</td>
<td>HUD</td>
<td></td>
</tr>
</tbody>
</table>
Base Job tab

**Note:** the Effective Date on this tab drives the information you will see on the subsequent tabs.
Payroll Default tab

*Connected to Job Detail effective tab*

Deferred Pay tab

*Connected to Job Detail effective tab*
Miscellaneous tab

Connected to Job Detail effective tab

Note: Supervisor information will not be displayed on this page. To derive an employee’s Supervisor, you must use the Reports To Position information in NBAPOSN.

Excluded Deductions/Benefits tab (Not used)
Default Earnings tab

*If you would like to view this information with a different Effective Date*, go to Options, and then ‘View Earn code Effective Dates’

Another window will pop up.
Work Schedule tab (Not used)
Job Labor Distribution tab

*If you would like to view this information with a different Effective Date,* go to Options, and then *‘View Earn code Effective Dates’*

Another window will pop up.
PPACMNT - Education Information

PTRJCRE - Job Change Reason Codes
## Glossary of Banner INB Terms

<table>
<thead>
<tr>
<th>Banner INB Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form</td>
<td>Similar to the concept of a menu item in PeopleSoft, a Form in Banner INB contains categories of information. Once you are in a Form, you may see tabs which identify additional sub-categories of fields and information. All the Banner INB Forms are listed and described in the Forms – Quick Reference section of this guide.</td>
</tr>
<tr>
<td>Block</td>
<td>Most pages in Banner INB are separated into Blocks. At the top of the page there is the ‘Key Block’ and below that you will see the information corresponding to the values in the fields in the Key Block.</td>
</tr>
<tr>
<td>Key Block</td>
<td>Most Forms display a Key Block, which is the top section of the page and the values in the Key Block fields determine what will be displayed within the Blocks on the page below. You begin to search for your record by clicking on the arrow next to the ID field in the Key Block.</td>
</tr>
</tbody>
</table>
| Next Block      | An icon found in the toolbar, Next Block executes the command which populates all the fields in the blocks below the Key Block.  
  - Keyboard shortcut = Ctrl+PgDn |
| Rollback        | An icon found in the toolbar, Rollback is essentially the opposite of Next Block. Rollback executes the command which clears all the fields in the blocks below the Key Block. You must use Rollback to begin a new search for another record in the Form or to change any of the values in the fields shown in the Key Block, such as Query Date or Position ID.  
  - Keyboard shortcut = Shift+F7 |
| Query Date      | Any Form containing historical transactions will display a Query Date field in the Key Block. The default date of the Query Date is today’s date, so the transactional rows of information displayed to you in the Form is limited to the row ‘as of’ today, plus any future dated transactions. If you would like to view all transactions beginning on a certain date in history, you will enter that historical date. Note: the earliest date in Banner is 7/1/2010. |