Banner 9
Frequently Asked Questions
for Student and Financial Aid Offices

Contents

OFFICES OF STUDENT REGISTRATION & FINANCIAL AID

Q. What changes should I expect to see in Banner 9 for Student and Financial Aid Administration?

Banner 9 brings with it a new user interface and improved navigation and accessibility. The Banner 9 administrative applications—including Banner Human Resources, Banner Finance, Banner Student, Banner Accounts Receivable, Banner Financial Aid, and Banner Advancement—all now have a consumer-web feel. Users will benefit from an intuitive, modern experience, whether they're accessing applications via mobile, portal, or self-service interfaces. Each application includes usability improvements, easing the learning curve and reducing the need for training. Power users, too, will gain enhanced usability and navigation without losing their familiar business rules and shortcuts. It will also give you greater flexibility as you'll be able to run Banner on any browser or tablet. So while the administrative applications have a new look and feel, the functionality still works in the same familiar way. You will not need to learn a new application; you will just learn new navigation.

You can view a demo of:
[Banner Student Administration](#)
[Banner Financial Aid](#)
[Banner Student Aid](#)

In addition to an updated user experience in the administrative Student application, there are several Banner 9 self-service application updates for Student. While institutions are not required to upgrade to Banner 9 self-service by the end of 2018, these are valuable improvements to consider. These include:

Attendance Tracking - offers faculty members an easy, all-new tool for documenting student attendance, saving the registrar and financial aid officers' time. You can view a demo [here](#).

Advising Student Profile - now consolidates a student's profile, education, and career path on a single page. And it's newly accessible to advisors and students, allowing for truly personalized advice that helps students make better academic decisions. You can view a demo [here](#).

Student Self-Service now includes Class Roster and View Grades functionalities:
- **Class Roster** lets faculty members review their students' academic profiles and schedules, communicate with students over email, print class rosters, and more.
- **View Grades** lets faculty members, students, and their advisors view a student's academic progress.

Faculty Grade Entry – now offers faculty members mobile capability for entering assignment grades and posting midterm, final, and incomplete grades. The application can then automatically compute a final grade. To make things even easier, faculty members can also import grades directly from their existing spreadsheets or their learning management system.

Events Management – helps you plan, manage, and monitor both virtual and in-person events such as first-year orientation, campus seminars, and conferences. Attendees can easily register online, and they'll even receive automatic updates about details such as time and location—so your events will be better attended and you can invest in events that pay off.

Registration – has been updated with intuitive registration tools and a mobile-friendly design to make it easier than ever for students, advisors, and administrators to use.

Q. What is the context behind the upgrade timeframe? Can this be pushed out?

A significant driver for this timeframe is that Banner 8 administrative applications (or Banner INB) run on Oracle Forms 11gR2. Oracle Forms and Reports 11gR2 is ending Oracle's Extended Support on Dec. 31, 2018 and entering Sustaining Support starting Jan. 1, 2019.

Oracle's Sustaining Support does not include:
- New feature updates, fixes, security alerts, data fixes, and critical patch updates
- New tax, legal, and regulatory updates
- New upgrade scripts
- Certification with new third-party products/versions
- Certification with new Oracle products

Ellucian recognizes this level of support for Oracle Forms and Reports would not be acceptable to institutions therefore we are moving Banner 8 administrative applications to Sustaining Support starting Jan. 1, 2019.

Banner 8 self-service does not depend upon Oracle Forms, and will continue to be supported beyond Dec. 31, 2018. Institutions are encouraged to upgrade their administrative applications first.

Q. What happens if we can't upgrade to Banner 9 in time? What are the risks?

As you know, Ellucian will move Banner 8.x administrative forms to Ellucian's Sustaining Support status on January 1, 2019. This move aligns to the underlined extended support date for Oracle Forms 11gR2 ending on Dec. 31, 2018.

Once in Sustaining Support, there will be *no new software releases, patches or fixes, regulatory updates, or solution enhancements*. Sustaining Support begins at the end of Maintenance Support and lasts until Ellucian announces End of Life.

During Ellucian's Sustaining Support, customers will still have the following:

- Support from Action Line analysts via the Ellucian Support Center, email or phone
- Access to *previously supplied* patches, fixes and regulatory updates
- Full access to online content such as knowledge base articles, product documentation, eCommunities forums, and product downloads

Risks: If an institution remains on Banner 8 administrative forms past 2018, and runs into any issues or requires application changes such as regulatory updates, Ellucian will not be able to provide assistance on these issues beyond Action Line support.

Q. What are the regulatory risks / timeline I need to consider?

Ellucian plans to deliver Banner 8 regulatory releases, including Financial Aid updates for 2019-20 processing, through November 2018. However, we strongly encourage customers to complete the move to Banner 9 administrative applications before starting your 2019-2020 financial aid processing to ensure continuity and minimize disruptions as you move into 2019. By staying current on the software and upgrading before the end of 2018, you ensure the safest path forward for your institution.

Ellucian **does not** plan to deliver any Banner 8 regulatory updates for administrative applications in December 2018 (e.g. U.S. W-2s, Canadian T-4s, etc.) due to the small window in which they can be used effectively. As a reminder, once in Sustaining Support, there will be no new software releases, patches or fixes, regulatory updates, or solution enhancements for Banner 8 administrative applications, even if related to 2018 processing and reporting. **Note: This information ONLY applies to Banner 8 administrative applications on Oracle Forms; all Banner Self-Service regulatory updates will continue to be released in Banner 8.**

Of course, it is unclear yet what regulatory changes will be necessary in 2018 or beyond. The safest thing to do is plan your upgrade so your team won't have to worry about these issues. Ellucian is ready to help you throughout the upgrade process.

Q. Who else has moved forward with the Banner 9 upgrade?

Nearly all Banner customers have already begun the process or moved to Banner 9. There are case studies on Ellucian's site and on the Banner 9 Guide. Also there is a library of client presentations on Banner 9 available on the Banner 9 Guide at this link.

Q. What do I need to consider if our institution has modifications?

Ellucian has tools to help bring your administrative form modifications forward to Banner 9. Within the Banner 9 Guide, your IT team can upload your administrative forms for an analysis of your modifications. After completing the survey, your analysis is sent directly to your Account Executive who can discuss your results with your IT team as well as the services offerings Ellucian provides to assist with the process. You may find that many of your modifications can be eliminated as well due to features that have been added to Banner since the modification was first implemented.

Q. Do we need Services to complete the upgrade to Banner 9?

In short, no. If your IT staff is already upgrading and maintaining Banner 8, they have the skills needed to upgrade to Banner 9.

To date, many customers have moved to Banner 9 with little or no services support from Ellucian. That said we recognize that every customer situation is different. Your specific plan will depend on the people and time you have available to support the upgrade and the degree to which you have modified Banner.

There are two primary types of services developed for the Banner 9 Upgrade: (1) Forms Transformation Services offered at a discount rate, to move your previous administrative form modifications into the extensibility framework within Banner 9 Admin, and (2) Professional Services to ready your environment or help with process management.

Additionally, considering Ellucian Solution Manager (ESM) and single sign-on are both prerequisites for Banner 9 Admin, many clients have leveraged Ellucian Services to set up and establish these enablers and accelerate their Banner 9 upgrade efforts. There is also **optional** technical training available to help IT teams with these efforts. The Banner 9 Essentials training covers many of these pre-requisites for IT teams and is also offered at a discounted rate.

Q. What training or re-training of staff will be needed to use the new system?

Very minimal training is needed for the new user interface. For the forms, Banner 8 to Banner 9 was a "one to one" form replacement, so all fields and completion processes will be the same for users. Think of this move as moving from an older version of an email browser (like Gmail or Yahoo) to a newer version. Most users have been able to pick it up with little to no training.

If you find you do need user training, within the Banner 9 Guide and Ellucian Education Services, we offer the following training options:

- Webinars
- Online classes
- Training documentation / user guides

Q. Will I experience any down time with the move to Banner 9?

Your IT Office is able to run Banner 8 and Banner 9 concurrently as your institution moves through the upgrade process.   There will be minimal down time compared to upgrades of years past.

Q. Will our IT staff have to acquire new skills to conduct or maintain the upgrade?

In short, no. If your IT staff is already upgrading and maintaining Banner 8 INB, SSB, and Online Help, they have the skills needed to upgrade and maintain Banner 9.   Ellucian Solution Manager simplifies the upgrade process for your IT staff, reducing the time to load upgrades and eliminating manual steps that are prone to error.

Choosing to run Banner 9 on Tomcat instead of Weblogic, or extending Banner 9 by bringing custom functionality into the application may require additional, very common java based technical skills your IT staff may or may not have, but these skills are not needed to upgrade from Banner 8 to Banner 9.

Q. What are the implications for integration with Ellucian DegreeWorks?

The Banner 9 Administrative Applications and Self-Service Applications continue to work seamlessly with Ellucian DegreeWorks.

Q. So what's the bottom line and what should I do next?

Keep in mind that getting the administrative applications moved over to Banner 9 is most important, and must be done by December 31, 2018 to receive needed regulatory updates, and other software updates. Take a look at the Banner 9 administrative applications videos so that you know what to expect.

Also, while it is possible to run Banner 8 SSB and Banner 9 INB concurrently, the Banner 9 self-service applications have significant improvements in functionality, usability and navigation. You may wish to become familiar with all that Banner 9 has to offer beyond the administrative functions.