



IWU Banner 9 Self Service User Guide

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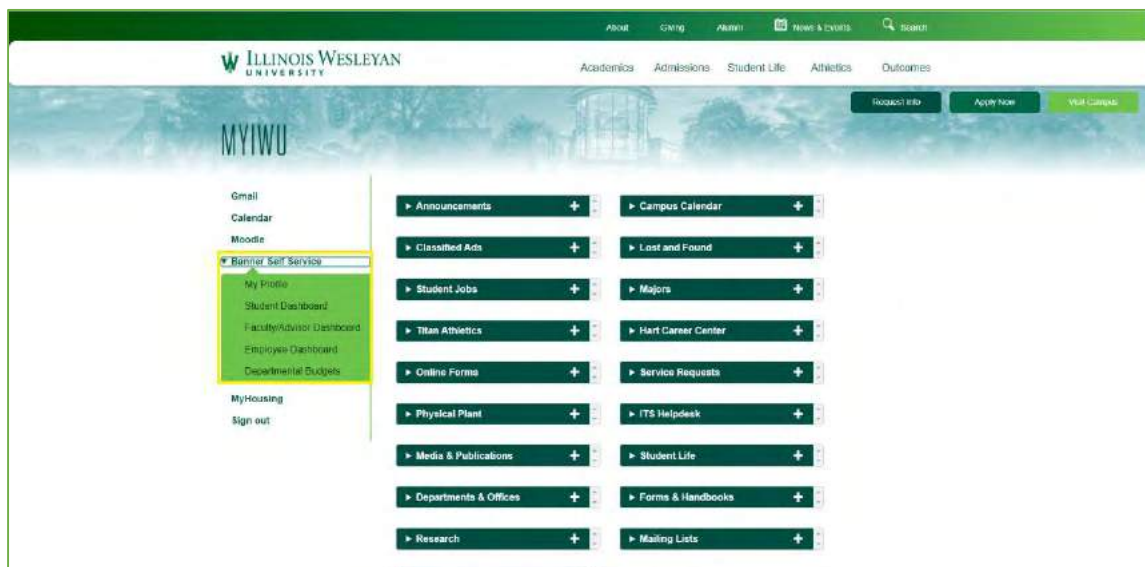
Banner 9 Self Service Introduction

Welcome to the Banner 9 Self Service User Guide. This document will assist you with the new features that are available to Banner 9 Self Service.

You can access Banner 9 Self Service from the left menu pane in [MyIWU](#) by clicking on the Banner Self Service link to view the Self Service submenu. From here, you will have the option to select the following links:

- My Profile
- Student Dashboard
- Faculty/Advisor Dashboard
- Employee Dashboard
- Departmental Budgets

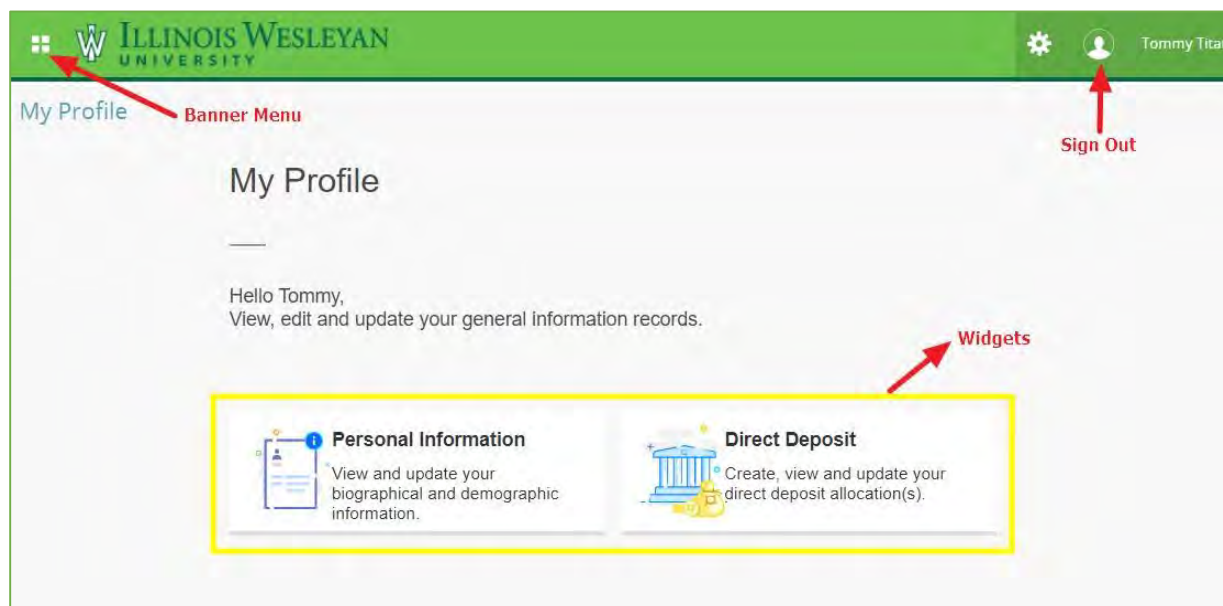
Once you have selected the link of your choice, you will be directed to the selected dashboard in Banner 9 Self Service. If you do not have access to that service, you will receive a message saying you are not authorized.



My Profile

If you click on the My Profile in the Banner Self Service submenu from [MyIWU](#), you will be taken to the new My Profile Dashboard. The new Banner 9 Self Service home page will look similar the screen below.

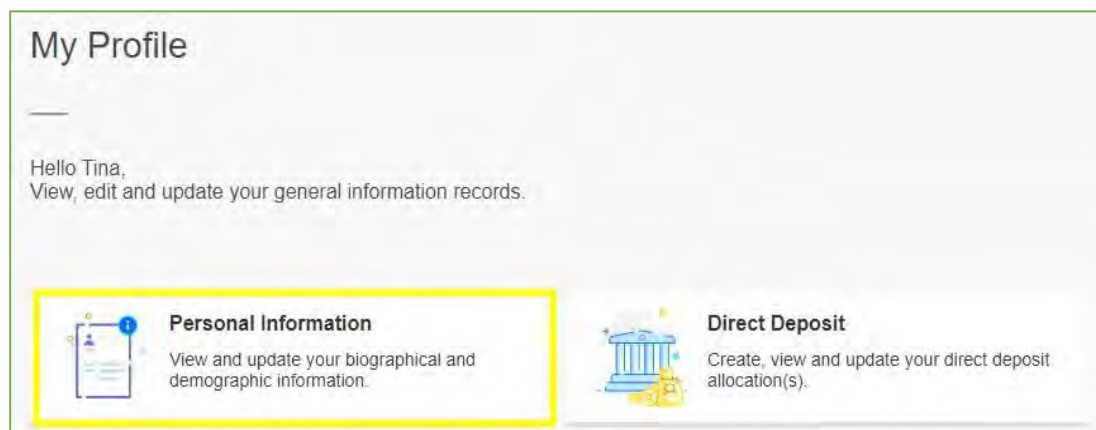
NOTE: THE WIDGETS AND MENUS AVAILABLE WILL DEPEND ON YOUR ROLE AT IWU (FACULTY, STAFF, OR STUDENT)




From the new My Profile Dashboard you will be able to access all Self Service modules (dependent on your role at IWU—student, faculty, or staff).

Personal Information Page

The Personal Information page can be accessed through the My Profile, Student, Faculty/Advisor, or Employee Dashboards, as well as from the Banner Menu. This page allows you to review and edit any of your personal information that you have registered with Illinois Wesleyan University. You can access the Personal Information page in two ways:

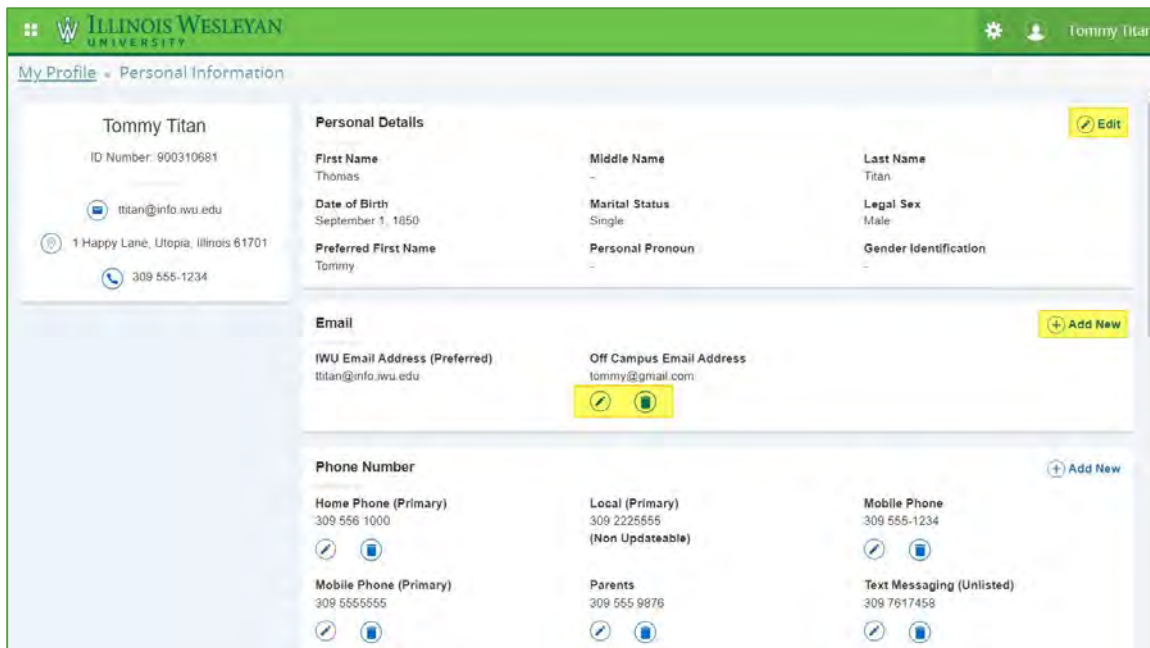


Click on the Personal Information widget or access it through the Banner Menu button  in the upper left corner of the dashboard.



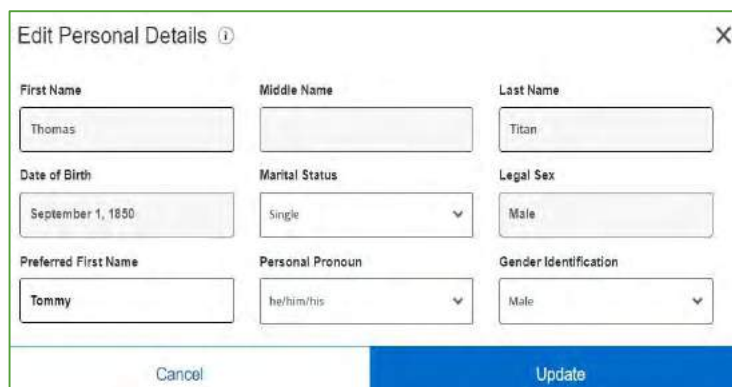
The Personal Information page will display your Personal Details, Email, Phone Number, Address, Emergency Contact, and Additional Details. Within each section you can add, edit, and delete your personal information by clicking on the corresponding buttons (see highlighted buttons below).

NOTE: SOME INFORMATION IS NOT UPDATEABLE AND CAN ONLY BE CHANGED BY CONTACTING THE APPROPRIATE OFFICE (REGISTRAR’S OFFICE FOR STUDENTS, HR OFFICE FOR FACULTY AND STAFF).



Personal Details Section

You can update the fields with the white background. To update the greyed-out fields you will have to contact the appropriate office (Registrar's Office for students, HR Office for faculty and staff). Click the Update button to save your changes and return to the Personal Information page.

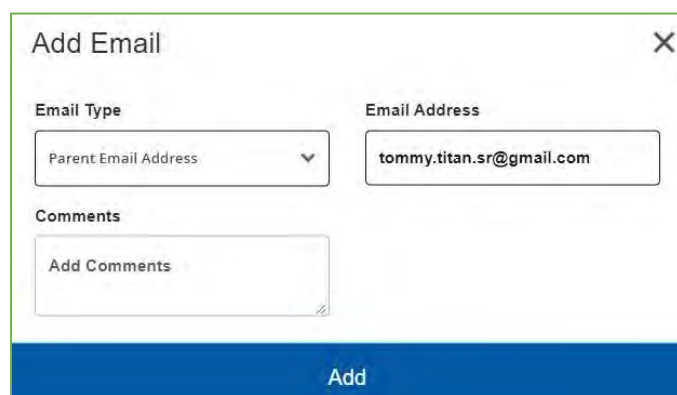


The 'Edit Personal Details' form is a modal window with a title bar containing an information icon and a close button. It contains several input fields arranged in a grid. The first row includes 'First Name' (text input with 'Thomas'), 'Middle Name' (greyed-out text input), and 'Last Name' (text input with 'Titan'). The second row includes 'Date of Birth' (calendar picker with 'September 1, 1850'), 'Marital Status' (dropdown menu with 'Single'), and 'Legal Sex' (text input with 'Male'). The third row includes 'Preferred First Name' (text input with 'Tommy'), 'Personal Pronoun' (dropdown menu with 'he/him/his'), and 'Gender Identification' (dropdown menu with 'Male'). At the bottom, there are two buttons: 'Cancel' and 'Update'.


Email Section


You can add a new email address or edit/delete an existing email address.

To add a new email address, click the Add New button. Select the type of email you want to add. You have the option to add non-custodial parent email, off-campus email, or parent/guardian email. Then enter a valid email address and optional comments. Click the Add button to save and return to the Personal Information page.



The 'Add Email' form is a modal window with a title bar containing a close button. It contains three main sections. The first section is 'Email Type' with a dropdown menu showing 'Parent Email Address'. The second section is 'Email Address' with a text input field containing 'tommy.titan.sr@gmail.com'. The third section is 'Comments' with a text area containing 'Add Comments'. At the bottom, there is a large blue button labeled 'Add'.

To edit an existing email address, click on the Edit button  below the email you want to update. Make the changes and click the Update button to save and return to the Personal Information page.

To delete an existing email, click on the Delete button  below the email you want to delete. You will receive a warning message to confirm the deletion. Click Delete to confirm or click Cancel if you change your mind.

NOTE: IF AN EMAIL ADDRESS DOES NOT HAVE AN EDIT OR DELETE BUTTON BELOW THE EMAIL, IT IS NOT UPDATEABLE AND YOU WILL HAVE TO CONTACT THE APPROPRIATE OFFICE (REGISTRAR'S OFFICE FOR STUDENTS, HR OFFICE FOR FACULTY AND STAFF) TO DISCUSS ANY CHANGES.

Phone Number Section

You can add a new phone number or edit/delete an existing phone number.

To add a new phone number, click the Add New button. Select the phone number type you want to add. You have the option to add home phone, mobile phone, non-custodial parent, on campus-office phone, parent/guardian, or text messaging. Then enter the area code and phone number. Select whether that contact number will be primary or unlisted for the phone type selected. Click the Add button to save and return to the Personal Information page.

Add Phone Number [X]


Phone Type
Select Phone Type [v]

Phone Number
Area Code [] Phone Number [] Extension []

International Access Code and Phone Number
International Phone Number []

Primary Unlisted

Add

To edit an existing phone number, click on the Edit button  below the phone number you need to update. Make the changes and click the Update button to save and return to the Personal Information page. *Dashes are not necessary when entering a phone number.*

Edit Phone Number [X]


Phone Type
Mobile Phone

Phone Number
309 [] 5551234 [] Extension []

International Access Code and Phone Number
International Phone Number []

Primary Unlisted

Cancel [] **Update**

To delete an existing phone number, click on the Delete button  below the phone number you want to delete. You will receive a warning message to confirm the deletion. Click Delete to confirm or click Cancel if you change your mind.

⚠ Are you sure you want to delete the selected telephone number?

Cancel [] Delete []

NOTE: IF A PHONE NUMBER DOES NOT HAVE AN EDIT OR DELETE BUTTON BELOW THE PHONE NUMBER, IT IS NOT UPDATEABLE AND YOU WILL HAVE TO CONTACT THE APPROPRIATE OFFICE (REGISTRAR'S OFFICE FOR STUDENTS, HR OFFICE FOR FACULTY AND STAFF) TO DISCUSS ANY CHANGES.

Address Section

You can add a new address or edit/delete an existing address.


To add a new address, click the Add New button. Students have the option to add home address, IWU alert, off-campus residence, and parents' address. Faculty and staff have the option to add home address and IWU alert address. Select the address type you want to add along with the dates that the address type will be valid. If the address is current with no future end date, leave the Valid Until field blank. Then enter a permissible address, city, state/province, county (optional), zip, and country. Click the Add button to save and return to the Personal Information page.

NOTE: IF ADDING A NEW ADDRESS TO REPLACE AN ADDRESS THAT IS NO LONGER VALID, PLEASE REMEMBER TO DELETE THE OLD ADDRESS AS WELL.

The 'Add Address' form contains the following fields:

- Type of Address: Select Address Type (dropdown)
- Valid From: MM/dd/yyyy (calendar icon)
- Valid Until: MM/dd/yyyy (calendar icon)
- Address Line 1: Enter Address Line 1
- Address Line 2: Enter Address Line 2
- Address Line 3: Enter Address Line 3
- Address Line 4: Enter Address Line 4
- City: Enter City
- State/Province: Select State (dropdown)
- County: Select Country (dropdown)
- Zip/Postal Code: Enter Zip Code
- Country: Select Country (dropdown)


At the bottom is a blue button labeled 'Add'.

To edit an existing address, click on the Edit button  below the address you want to update. Make the changes and click the Update button to save and return to the Personal Information page.

The 'Edit Address' form contains the following pre-filled fields:

- Type of Address: Home Address
- Valid From: 07/09/2015 (calendar icon)
- Valid Until: MM/dd/yyyy (calendar icon)
- Address Line 1: 1 Happy Lane
- Address Line 2: Enter Address Line 2
- Address Line 3: Enter Address Line 3
- Address Line 4: Enter Address Line 4
- City: Utopia
- State/Province: Illinois (dropdown)
- County: Select Country (dropdown)
- Zip/Postal Code: 61701
- Country: United States of America (dropdown)

At the bottom are buttons for 'Cancel' and 'Update'.

To delete an existing address, click on the Delete button  below the address you want to delete. You will receive a warning message to confirm the deletion. Click Delete to confirm or click Cancel if you change your mind.

The dialog box contains the following text and buttons:

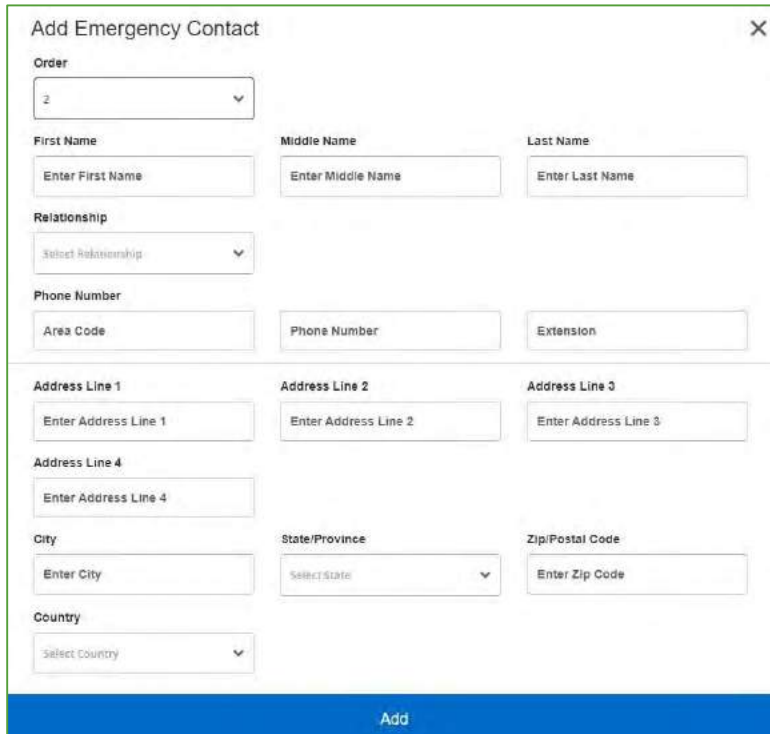
⚠ Are you sure you want to delete the selected address?

Buttons: Cancel, Delete

Emergency Contact Section

You can add a new emergency contact or edit/delete an existing emergency contact.


To add a new emergency contact, click the Add New button. Select the order in which we should alert your new emergency contact along with their name, relationship, phone number, and full address. Click the Add button to save and return to the Personal Information page.



The screenshot shows a form titled "Add Emergency Contact" with a close button (X) in the top right corner. The form is organized into several sections:

- Order:** A dropdown menu with the value "2" selected.
- Name:** Three input fields labeled "First Name", "Middle Name", and "Last Name", each with a placeholder "Enter [Name Type] Name".
- Relationship:** A dropdown menu with the placeholder "Select Relationship".
- Phone Number:** Three input fields labeled "Area Code", "Phone Number", and "Extension".
- Address:** Four input fields labeled "Address Line 1", "Address Line 2", "Address Line 3", and "Address Line 4", each with a placeholder "Enter Address Line [Number]".
- City:** An input field with the placeholder "Enter City".
- State/Province:** A dropdown menu with the placeholder "Select State".
- Zip/Postal Code:** An input field with the placeholder "Enter Zip Code".
- Country:** A dropdown menu with the placeholder "Select Country".

At the bottom of the form is a blue button labeled "Add".

To edit an emergency contact, click on the Edit button  below the contact you need to update. Make the changes and click the Update button to save and return to the Personal Information page.

Edit Emergency Contact
✕

Order

1

First Name

Margo

Middle Name

L

Last Name

Jones

Relationship

Mother

Phone Number

309

666-3379

Extension

Address Line 1

1211 Park Street

Address Line 2

Enter Address Line 2

Address Line 3

Enter Address Line 3

Address Line 4

Enter Address Line 4

City

Bloomington

State/Province

Illinois


Zip/Postal Code


11111

Country

United States of America

Cancel
Update

To delete an existing emergency contact, click on the Delete button  below the emergency contact you want to delete. You will receive a warning message to confirm the deletion. Click Delete to confirm or click Cancel if you change your mind.

 Are you sure you want to delete the selected emergency contact?

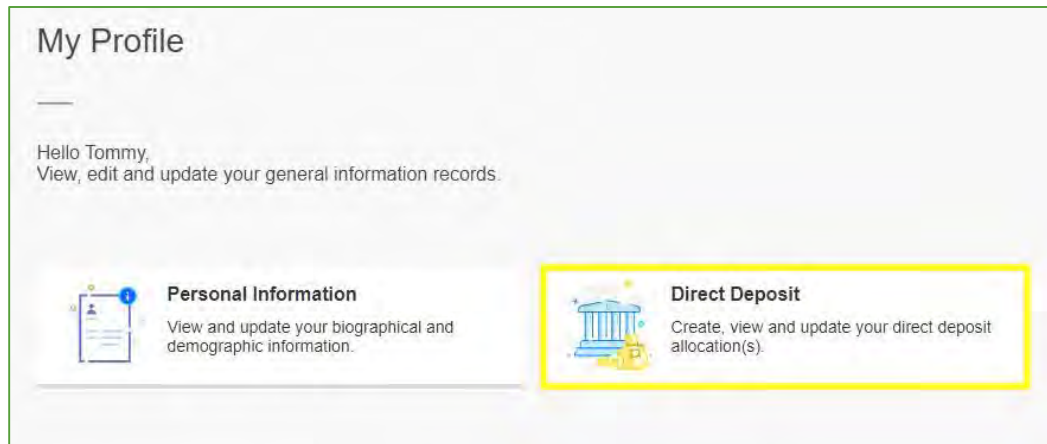
Cancel
Delete

Additional Details Section

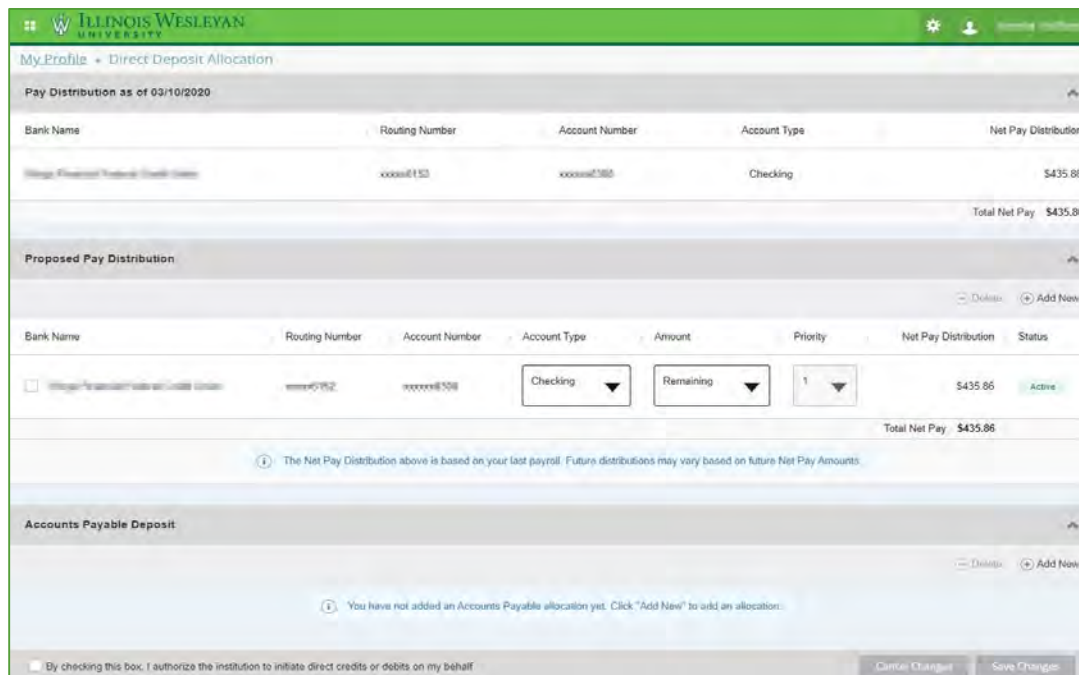
The information displayed in this section is not updateable. You can contact the appropriate office (Registrar's Office for students, HR Office for faculty and staff) to discuss changes.

Direct Deposit Page

The Direct Deposit page can be accessed through the My Profile Dashboard. This page allows you to review and edit any of your direct deposit banking information that you have registered with Illinois Wesleyan University. You can access the Direct Deposit page by clicking on the Direct Deposit widget



The Direct Deposit Allocation page displays your latest pay distribution, your proposed pay distribution, and any accounts payable deposits. You can update your banking information from this page by click in the Add New button or by contacting the Business Office.



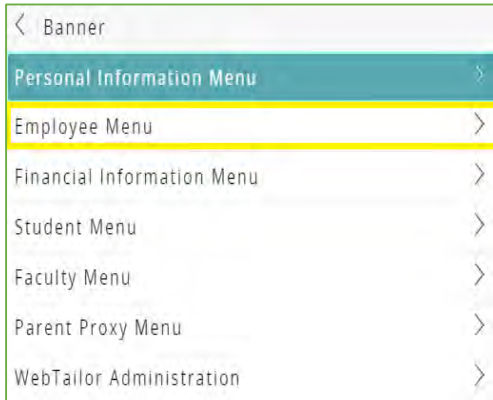
Employee Self Service

The Employee Self Service Menu is available for all faculty and staff. This module allows employees to view and/or manage their leave balances, pay information, earnings, taxes, job and employee information. In addition, supervisors can view information on the staff members they manage.

Step 1: Select the Banner Menu icon in the top left corner next to the IWU logo.



Step 2: Click “Banner”, then “Employee Menu”.



Step 3: Click “Employee Self-Service”. You will be taken to the new Employee Dashboard.



[Continue here to learn about navigating the Employee Dashboard.](#)

Finance Self Service

The Financial Information Menu is available for faculty and staff that have budget access in Banner. This module will allow you to query your budget information just as you did in Banner 8 Finance Self Service.

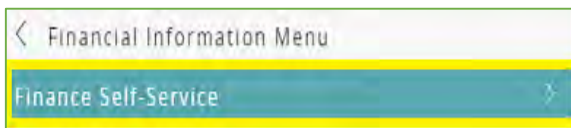
Step 1: Select the Banner Menu icon in the top left corner next to the IWU logo.



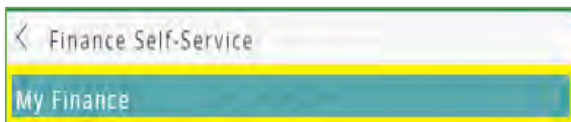
Step 2: Click “Banner”, then “Financial Information Menu”.



Step 3: Click “Finance Self-Service”.



Step 4: Click “My Finance”. You will be taken to the new My Finance Dashboard.



[Continue here to learn more about the new My Finance Dashboard.](#)

Student Services Dashboard

The Student Menu is available for all students. This module allows students to register for courses, view their academic records and financial aid, make payments to the University, and access their 1098T tax information. Use the directions below to access Student Self Service from the My Profile Dashboard. However, the Degree Evaluation functionality is still in the Banner 8 version so you will be directed to Self Service 8 where you can continue to use the module as before.

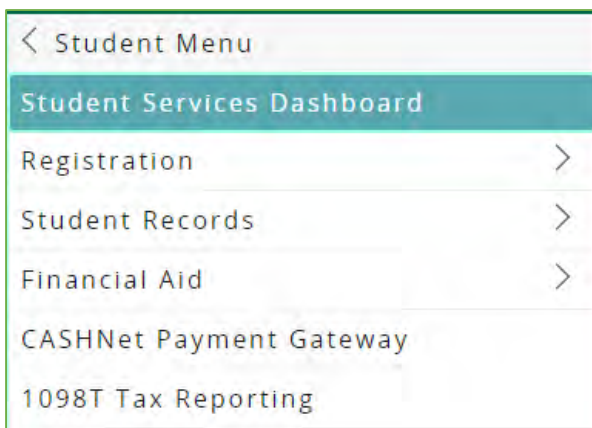
Step 1: Select the Banner Menu icon in the top left corner next to the IWU logo.



Step 2: Select “Banner”, then “Student Menu”.



Step 3: Select any of the options available in the Student Menu to be directed to your request.



Click here for more information on the Student Services Dashboard: [Banner 9 Self-Service Video Tutorials](#)

Faculty Self-Service

The Faculty Menu is available for all advisors and faculty members. Use the directions below to access Faculty Self Service from the My Profile Dashboard. However, all Faculty Self Service functionality is still in the Banner 8 version so you will be directed to Self Service 8 where you can continue to use the module as before.

Step 1: Select the Banner Menu icon in the top left corner next to the IWU logo.



Step 2: Click "Banner", then "Faculty Menu".



Step 3: Select any of the options available in the Faculty Menu to be directed to directed to your request.



Click here for more information on the Faculty Services Dashboard: [Banner 9 Self-Service Video Tutorials](#)

Parent Proxy Menu

The Parent Proxy Access Menu is available for all students. This module allows students to assign proxy access to selected Banner Self Service pages or allows parents to sign into their student's account if the parent has been given proxy access. Use the directions below to access Parent Proxy from the My Profile Dashboard. However, all Parent Proxy functionality is still in the Banner 8 version so you will be directed to Self Service 8 where you can continue to use the module as before.

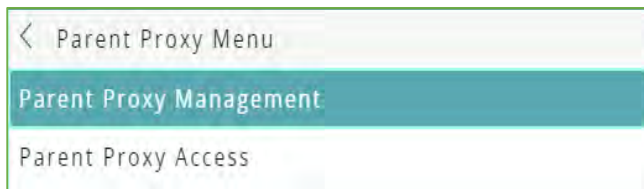
Step 1: Select the Banner Menu icon in the top left corner next to the IWU logo.



Step 2: Select “Banner”, then “Parent Proxy Menu”.



Step 3: Select any of the options available in the Parent Proxy Access Menu to be directed to your request.



Click here for more information on the Parent Proxy Dashboard: [Banner 9 Self-Service Video Tutorials](#)

Sign Out of Banner 9 Self Service

To sign out of Banner 9 Self Service from the My Profile Dashboard, click on the person icon next to your name in the upper right corner of the page.

My Profile

[Sign Out](#)

My Profile

Hello Tommy,
View, edit and update your general information records.



Personal Information

View and update your biographical and demographic information.



Direct Deposit

Create, view and update your direct deposit allocation(s).