

# MBUG 2014

Session Title: Documentation, Training and Support for the Banner End User

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Institution: Mississippi State University

Date: September 16, 2014  
9:00 a.m. – 10:00 a.m.



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# Session Rules of Etiquette

- Please turn off your cell phone
- If you must leave the session early, please do so discreetly
- Please avoid side conversations during the session
- Please Sign-In



# Topics of Discussion

- ▶ Why create Banner documentation
- ▶ Tools to create Banner documentation
- ▶ Suggested guidelines for creating a training plan
- ▶ Training mediums for the end user
- ▶ Providing support to the end user



# Documentation

- ▶ Determine what products / processes to document
  - Student, Finance, Human Resources
- ▶ Form a Project Team
  - Funding
  - Knowledge base (user and technical)
  - Writing/editing and production
- ▶ Types of documentation
  - Handouts
  - Factsheets
  - Manual
  - On-line resources



# Documentation Tools

- ▶ Word Processing Software
  - Microsoft Word
- ▶ Page Layout Software
  - Adobe InDesign
  - Microsoft Publisher
- ▶ Screen Capture & Photo Editing Software
  - Techsmith SnagIt
  - Adobe Photoshop
- ▶ PDF Creator
  - Adobe Acrobat
  - Cute PDF



# Training Considerations

- ▶ Rationale for training
  - Smoother transitions
    - Easier to let go of the “old system”
  - Job success
    - Users have more self-confidence
  - Limited need for support
    - Hands-on exposure with retention
    - Immediate follow-up resources



# Planning and Preparing for Training

- ▶ Determine objectives and sequence
- ▶ Personnel organization
  - Form a team
    - Dedicated
    - Technical
- ▶ Training Resources
  - Lab (dedicated or shared)
  - Layout and equipment
  - Handouts/instruction
  - Peripherals



# ITS Training Lab



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# ITS Training Lab



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# Training Challenges

- ▶ Training Challenges
  - Identifying users that will require training
  - When will training be offered?
  - What type of training will work best?



# Training Delivery Mediums

- ▶ Instructor-led classroom training
  - Hands on
  - One-on-one
- ▶ Self-paced, computer-based training
  - e-learning via Blackboard
- ▶ Online
  - Webinars

Virtual Training



# Selecting an Appropriate Training Delivery Medium

- ▶ What requirements do I need to consider when selecting an appropriate training medium?
  - Adult learning needs
  - Tasks to be completed
  - Training environment
- ▶ Long-term training
  - Develop yearly training goals
    - Use class evaluation results
  - Major system upgrade plan of action



# Training Specifics

- ▶ Registration system
  - Training History
  - Issue Certificate of Completion
- ▶ Overview of training @ MSU
  - Introduction (Navigation & Financial Query)
  - Finance (Requisitions and Invoices)
  - Human Resources (Payroll, Leave, Electronic Approvals of Online Job Labor Redistributions)
- ▶ Functional training
  - Training within specifics areas:
    - Procurement, Registrar, Financial Aid, etc.



# Training Numbers

- ▶ Dedicated BANNER training
  - March 23, 2013 through March 20, 2014
    - 45 BANNER classes completed
      - 49 classes scheduled
    - 344 participants completed training
    - Not a unique participant total












# Administration Page - General Course Listing

[Return to Admin Menu](#)

Start Date **Mar-21-2013**  End Date **Sep-21-2014** 

[\[ List Course Completions \]](#)









































































-  View Course Evaluation Statistics
-  Enrollment Management
-  Load People into the Course
-  Email the Class
-  Print Attendance Sheet
-  Print Certifications
-  View the Course Details
-  Print Specific Certifications
-  Waiting on completion of another class.

NetId

Maximum Class Size  
 Seats Left  
 Enrolled  
 Waiting  
 Canceled  
 No Show  
 Completed  
 Could Not Complete  
 or Course Canceled

Course Type Workshop Title Date [M-D-Y] Time Entry Status Who Can Attend

Courses that started before today.

|   |   |   |   |   |   |    |   |                                  |                                   |                        |                    |                                  |
|---|---|---|---|---|---|----|---|----------------------------------|-----------------------------------|------------------------|--------------------|----------------------------------|
|    |    |    |    |    |    | 1  | ADMIN BANNER - Electronic Approvals     | 21-Mar-2013                      | From: 10:00 am<br>Until: 12:00 pm | Canceled               | 15 15 0 0 0 0 0 2  | MSU<br>Administration<br>& Staff |
|    |    |    |    |    |    | 2  | ADMIN BANNER - Invoice Processing       | S: 26-Mar-2013<br>E: 27-Mar-2013 | From: 8:30 am<br>Until: 3:00 pm   | Listed                 | 15 15 0 0 1 1 9 0  | MSU<br>Administration<br>& Staff |
|    |    |    |    |    |    | 4  | ADMIN BANNER - Navigation and Financial | 03-Apr-2013                      | From: 8:30 am<br>Until: 12:00 pm  | Listed                 | 15 15 0 0 1 0 7 0  | MSU<br>Administration<br>& Staff |
|    |    |    |    |    |    | 6  | ADMIN BANNER - Requisitions             | S: 09-Apr-2013<br>E: 10-Apr-2013 | From: 8:30 am<br>Until: 4:00 pm   | Listed                 | 15 15 0 0 1 0 2 0  | MSU<br>Administration<br>& Staff |
|    |    |    |    |    |    | 2  | ADMIN BANNER - Invoice Processing       | 16-Apr-2013                      | From: 8:30 am<br>Until: 4:00 pm   | Listed                 | 15 15 0 0 1 0 3 0  | MSU<br>Administration<br>& Staff |
|    |    |    |    |    |    | 55 | Maymester Payroll Training              | 18-Apr-2013                      | From: 8:30 am<br>Until: 11:30 am  | Not Open<br>Enrollment | 15 3 0 0 2 1 12 0  |                                  |
|    |    |    |    |    |    | 55 | Maymester Payroll Training              | 18-Apr-2013                      | From: 1:30 pm<br>Until: 4:00 pm   | Not Open<br>Enrollment | 15 8 0 0 2 1 7 0   |                                  |
|  |  |  |  |  |  | 4  | ADMIN BANNER - Navigation and Financial | 01-May-2013                      | From: 8:30 am<br>Until: 12:00 pm  | Listed                 | 15 14 0 0 1 0 10 0 | MSU<br>Administration<br>& Staff |
|  |  |  |  |  |  | 5  | ADMIN BANNER - Payroll Time Entry       | 02-May-2013                      | From: 9:30 am<br>Until: 12:00 pm  | Listed                 | 15 15 0 0 1 1 13 0 | MSU<br>Administration<br>& Staff |
|  |  |  |  |  |  | 3  | ADMIN BANNER - Leave Entry              | 08-May-2013                      | From: 8:30 am<br>Until: 3:00 pm   | Listed                 | 15 14 0 0 4 0 11 0 | MSU<br>Administration<br>& Staff |
|  |  |  |  |  |  | 1  | ADMIN BANNER - Electronic Approvals     | 09-May-2013                      | From: 10:00 am<br>Until: 12:00 pm | Listed                 | 15 15 0 0 0 2 5 0  | MSU<br>Administration<br>& Staff |
|  |  |  |  |  |  | 4  | ADMIN BANNER - Navigation and Financial | 02-Jul-2013                      | From: 8:30 am<br>Until: 12:00 pm  | Listed                 | 12 12 0 0 5 0 12 0 | MSU<br>Administration<br>& Staff |

# Certificate of Completion



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*Information Technology Services*

*Certificate  
of completion*

**Michelle Terry**  
**Service Learning Center**

*Has completed the Workshop*  
**ADMIN BANNER – Leave Training with eForms**  
**September 09, 2014**

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**Instructor** Tamara Gibson





# NAVIGATION & FINANCIAL QUERY

- ▶ This class is designed for new users with no Administrative Banner experience or current users with little Administrative Banner experience. Participants will learn how Administrative Banner is used at MSU, basic form structure, and navigation skills.
- ▶ Several financial query forms will be reviewed including forms that are useful for viewing account balances and financial transactions, tracking purchasing activity for a department, searching for vendor addresses, and printing departmental monthly ledger sheet reports.
- ▶ 8:30 a.m. – 12:00 p.m.
- ▶ Offered monthly
  - except June and December
- ▶ Database
  - Production
- ▶ Prerequisite:
  - Administrative Banner PROD Account
- ▶ Requirements for access:
  - Currently employed at MSU as an Administrator or Staff
  - Completion and submission of the *Banner Access Request Form* requesting *BAN\_YQRYFIN* access



# PAYROLL TIME ENTRY

- ▶ This class is offered to departmental users to train them on the forms and processes involved in keying time for semi-monthly employees.
- ▶ University payroll policies and procedures are reviewed during a presentation by the Department of Human Resources Management.
- ▶ Participants work through keying a sample payroll and printing reports.
- ▶ 9:30 a.m. – 12:00 p.m.
- ▶ Offered bi-monthly
  - except June and December
- ▶ Database
  - Training
- ▶ Prerequisite:
  - Navigation & Financial Query Class
- ▶ Requirements for access:
  - Currently employed at MSU as an Administrator or Staff
  - Completion and submission of the *Banner Access Request Form* requesting *BAN\_DEPTSJN* & *BAN\_JOBSQRY* access



# LEAVE ENTRY w/eFORMS

- ▶ This class is offered to departmental users to train them on the forms and processes involved in keying leave either from the *Application for Leave Form* or electronically via eForms.
- ▶ University leave policies and procedures are reviewed during a presentation by the Department of Human Resources Management, as well as, security and auditing by the Office of Internal Audit.
- ▶ Participants work through keying sample leave requests and printing reports.
- ▶ 8:30 a.m. – 3:00 p.m.
- ▶ Offered bi-monthly
  - except June and December
- ▶ Database
  - Training
- ▶ Prerequisite:
  - Navigation & Financial Query Class
- ▶ Requirements for access:
  - Currently employed at MSU as an Administrator or Staff
  - Completion and submission of the *Banner Access Request Form* requesting *BAN\_LEAVE1* or *BAN\_HRLEAVEQ* access



# REQUISITIONS

- ▶ This two-day class covers the steps and processes required to create, complete, print and approve a requisition.
- ▶ A review of university and state policies for requisitions and procurement card usage is presented by the Office of Procurement & Contracts.
- ▶ This class requires submission of a requisition assignment that must be approved before access is granted.
- ▶ 8:30 a.m. – 4:00 p.m.
- ▶ Offered monthly
  - except May, June and December
- ▶ Database
  - Training
- ▶ Prerequisite:
  - Navigation & Financial Query Class
- ▶ Requirements for access:
  - Currently employed at MSU as an Administrator or Staff
  - Completion and submission of the *Banner Access Request Form* requesting *BAN\_REQ* access



# INVOICE PROCESSING

- ▶ This two-day class covers the steps and processes required to create, complete, print and approve a regular or direct pay invoice.
- ▶ A review of university and state policies for invoices is presented by the Office of Procurement & Contracts (Accounts Payable).
- ▶ 8:30 a.m. – 3:00 p.m. (day 1)
- ▶ 8:30 a.m. – 12:00 p.m. (day 2)
- ▶ Offered monthly
  - except May, June and December
- ▶ Database
  - Training
- ▶ Prerequisite:
  - Navigation & Financial Query Class
  - Requisitions Class
- ▶ Requirements for access:
  - Currently employed at MSU as an Administrator or Staff
  - Completion and submission of the *Banner Access Request Form* requesting *BAN\_INV* access



# ELECTRONIC APPROVALS OF ONLINE JOB LABOR DISTRIBUTIONS

- ▶ The EAJLR process allows users to view current distributions, make future changes and forward for approval.
- ▶ In this class participants will key a sample redistribution, query documents, approve transactions and print reports.
- ▶ 10:00 a.m. – 12:00 p.m.
- ▶ Offered bi-monthly
  - except June and December
- ▶ Database
  - Training
- ▶ Prerequisite:
  - Navigation & Financial Query Class
- ▶ Requirements for access:
  - Currently employed at MSU as an Administrator or Staff
  - Completion and submission of the *Electronic Approvals Request Form for Human Resource Actions & ORG access*



# Major BANNER Upgrade Sample Training Plan

- ▶ Create Committee/Team
  - ▶ Develop a timeline
  - ▶ Create documentation
  - ▶ Create an online resource
    - Provide information and progress
  - ▶ Focus Group
    - Two focus groups lasting one hour each
- Purpose:** Obtain feedback from users about training needs and support
- ▶ Identify training needs and support
  - ▶ Create training classes and registration system
  - ▶ “Test Your Computer” Week
  - ▶ Offer Preview Sessions
    - Lecture format
  - ▶ Open lab time
  - ▶ Publish Banner Downtime & Launch Dates
  - ▶ Offer new workshops



# Supporting the End User

- ▶ Provide technical support
  - Campus wide
  - Departmental
- ▶ Provide user support
  - One-on-one (phone, email, etc.)
  - Printed resources (manuals, factsheets)
  - On-line resources (read, print, view)
- ▶ Mailing list service
  - Sympa (replaced Majordomo)
  - Bannerlink





# Questions

