

# University of Idaho

# Banner Train Track

This guide includes course descriptions, prerequisites, and trainer contact information.



## **Employee Development and Learning**

Phone: 208-885-2323

Email: [gsmu@uidaho.edu](mailto:gsmu@uidaho.edu)

[Website](#)

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If you are a new employee or Banner user, please read through the introduction for Banner account setup.

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# Introduction

Employee Development and Learning works together with UI's Banner trainers to offer employees a successful and efficient Banner training experience.

If you are a new employee or new to Banner, please follow our Banner Steps-to-Success to gain access to Banner. *You must have an active Banner account prior to taking additional training.*

If you are a returning employee to UI and need your previous Banner account restored to active status, please contact us at [gsmu@uidaho.edu](mailto:gsmu@uidaho.edu) for assistance.

## Resources

- New users - [EDL Banner Webpage](#)
- You can find all current available Banner training on [GoSignMeUp!](#) UI's online learning management system.
- [Banner Navigation Keys and Icon Sheet](#)

## Steps-to-Success

### 1.

[New employees](#) and affiliates must complete all paperwork with Human Resources or an off campus HR representative. Your department will then initiate an Electronic Personnel Action Form (EPAF), which is required for you to obtain a Banner account login. Please check with your supervisor if you are unsure if an EPAF has been originated for you. Complete step one before moving on to step two.

### 2.

Obtain a Banner account login:

- Complete [Banner Navigation Training](#) online from our registration site GoSignMeUp! Make sure to submit the Banner account request form at the end of the training.
- ITS will create your Banner account and notify you within 24 business hours.
- Before you can login to Banner, you will need to change your AD password (required in order to sync your password with Banner account login) by logging into [help.uidaho.edu](http://help.uidaho.edu).

Only when you have an active Banner account should you proceed to step three. Do not take additional training until you have a Banner account as you will not be granted access to specific modules without an account.

### 3.

Once you have completed steps one and two, you are now ready to take additional training. After consulting with your supervisor, review this guide and the [GoSignMeUp!](#) course catalog to identify which training to take.

A general rule to remember is you must complete the Query training for the module you need access to (HR Query, Finance Query etc.) before completing other training within those modules.

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**NOTE: Advancement Services now uses CRM Advance (an Ellucian product) for fundraising management. Additional training is currently under development. Please contact Advancement Services with questions at [advserv\\_it@uidaho.edu](mailto:advserv_it@uidaho.edu) or 208– 885-2072**

## Prospect Management

**Type:** Instructional Video

**Prerequisite:** None

**Description:** This quick instructional video will familiarize you with the available prospect management functions within CRM Advance. You can view the video [here](#) or register for the course on GoSignMeUp! to receive a link.

**PLEASE NOTE:** This instructional video will not be reflected on your official training record as it is informational only. Your completion will not be tracked.

# Finance

**Special Note:** Purchasing Card Program & Travel Expense Training, while not part of the Banner Finance Module training track, is required for all Purchasing Card (P-Card) holders and Record Keepers. There are no Banner prerequisites to take the training. You can find a detailed course description and contact information on the [GoSignMeUp!](#) website.



## Finance Query



**Type:** Online

**Prerequisite:** Banner Navigation—active Banner account

**Contact:** Linda Keeney ☐ 208-885-5379 ☐ [finaccess@uidaho.edu](mailto:finaccess@uidaho.edu)

**Description:** This online training provides an overview of some of the most commonly used Banner and VandalWeb finance query forms, finance terms, vendor history and invoice status data, and how to find and view posted transactions.

## Accounts Receivable

**Type:** One-on-one

**Prerequisite:** Finance Query

**Contact:** Linda Aherin ☐ 208-885-2140 ☐ [laherin@uidaho.edu](mailto:laherin@uidaho.edu)

**Description:** Cashiering process for department deposits.

## Document Approval

**Type:** Online

**Prerequisite:** Finance Query

**Contact:** Linda Keeney ☐ 208-885-5379 ☐ [lkeeney@uidaho.edu](mailto:lkeeney@uidaho.edu)

**Description:** This online training provides a basic review of Banner finance approval forms.

## Journal Document

**Type:** Online

**Prerequisite:** Banner Navigation—active Banner account

**Contact:** Linda Keeney ☐ 208-885-5379 ☐ [lkeeney@uidaho.edu](mailto:lkeeney@uidaho.edu)

**Description:** This training is for employees who have Banner finance access and are responsible for managing budgets. Hands-on implementation of a budget transfer, how it affects the adjusted budget and available balance, the importance of budget transfers for proper budget management and alleviating NSF documents, and what budgets/funds are allowed budget transfers. Proper use of a cost transfer, revenue transfer, payroll cost transfer and IDG.

## Purchasing: Requisitions, Purchase Orders & Change Orders

**Type:** One-on-one

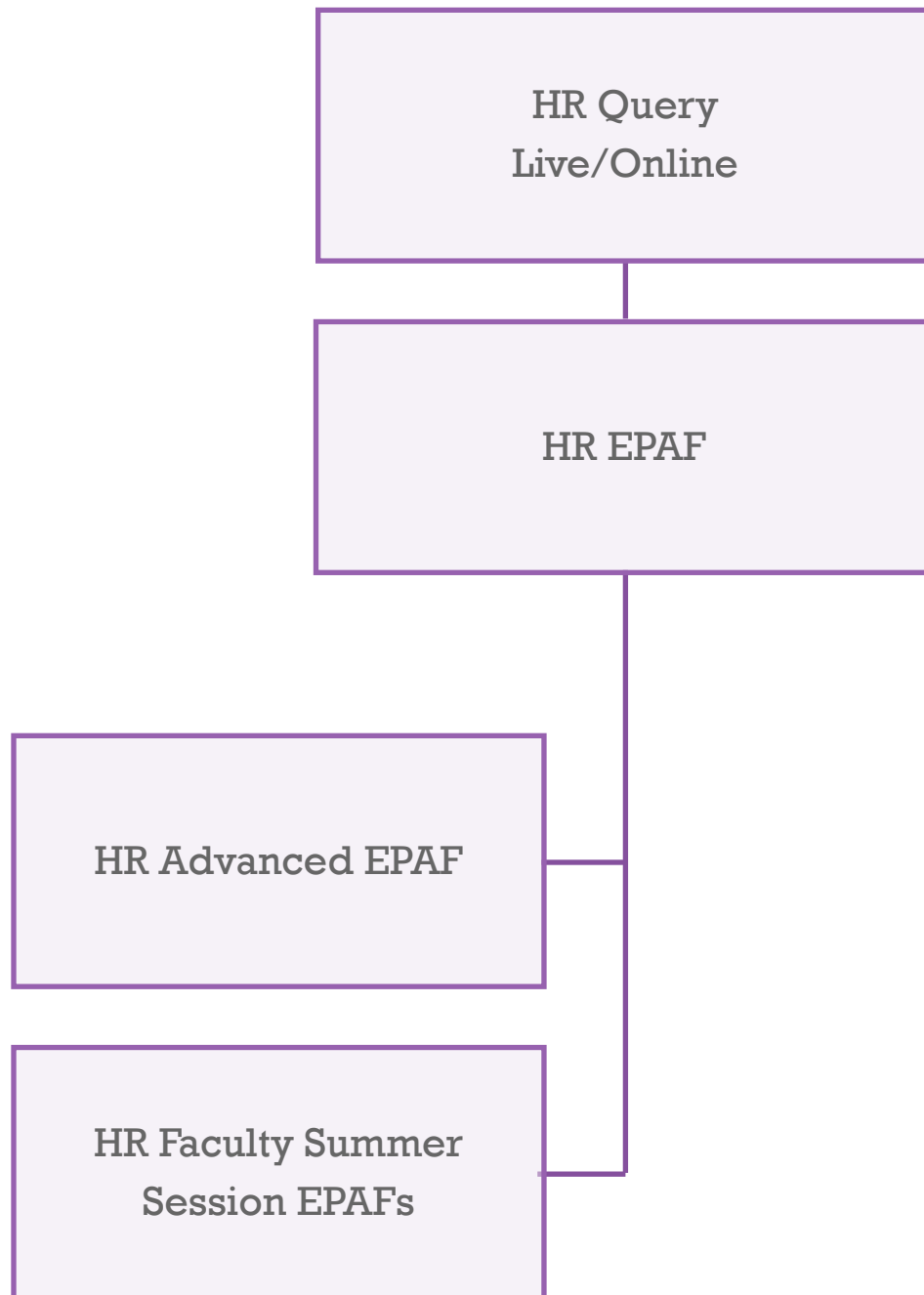
**Prerequisite:** Finance Query

**Contact:** Julia McIlroy, Crystal Christopherson ☐ 208-885-6116 ☐ [purchasing@uiidaho.edu](mailto:purchasing@uiidaho.edu)

**Description:** This training serves as an introduction to create Purchase Orders, Requisitions and Change Orders. It is designed for any employee who may enter or approve these documents.

# Human Resources

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## HR Query



**Type:** Online; live sessions scheduled periodically.

**Prerequisite:** Banner Navigation—active Banner account

**Contact:** Myung Chun ☐ 208-885-3728 ☐ [mchun@uidaho.edu](mailto:mchun@uidaho.edu)

Dan Noble ☐ 208-885-3677 » [danieln@uidaho.edu](mailto:danieln@uidaho.edu)

**Description:** This training is a prerequisite for all other Banner Human Resources (HR) module training. It provides instruction on how to look up and navigate through query forms within the Banner HR module: SPAIDEN, PEAEML, NBAJOBS, PHILIST, PEALEAV, PEIATND, FTIORGH, NBAPOSN, and PHIACCR.

Employees who work with personnel or payroll information should complete this training.

## HR EPAF

**Type:** Live

**Prerequisite:** HR Query

**Contact:** Myung Chun ☐ 208-885-3728 ☐ [mchun@uidaho.edu](mailto:mchun@uidaho.edu)

Dan Noble ☐ 208-885-3677 » [danieln@uidaho.edu](mailto:danieln@uidaho.edu)

**Description:** This training provides hands-on instruction for entering Electronic Personnel Action Forms (EPAFs) in the Banner HR Module. Trainees are given scenarios in which they must enter a new employee into Banner or change existing information. Handouts provide trainees assistance in selecting the appropriate approval category before the EPAF is entered.

This class should be taken by employees who will be entering EPAFs for a department, as well as those individuals who will be proxy for them in their absence.

Employees should register for this course and then contact a course instructor to schedule an appointment for live training.

## HR Advanced EPAF

**Type:** Live

**Prerequisite:** HR EPAF

**Contact:** Myung Chun ☐ 208-885-3728 ☐ [mchun@uidaho.edu](mailto:mchun@uidaho.edu)

Dan Noble ☐ 208-885-3677 » [danieln@uidaho.edu](mailto:danieln@uidaho.edu)

**Description:** This training builds on the Human Resources EPAF training and includes tips, tricks, frequently asked EPAF questions, and refreshers.

Employees should register for this course and then contact a course instructor to schedule an appointment for live training.

## HR Faculty Summer Session EPAFs

**Type:** Live (remote access available)

**Prerequisite:** HR EPAF

**Contact:** Myung Chun ☐ 208-885-3728 ☐ [mchun@uidaho.edu](mailto:mchun@uidaho.edu)

Dan Noble ☐ 208-885-3677 » [danieln@uidaho.edu](mailto:danieln@uidaho.edu)

Jill Robertson ☐ 208-885-7122 » [jrobertson@uidaho.edu](mailto:jrobertson@uidaho.edu)

Becky Latshaw ☐ 208-885-7045 » [rlatshaw@uidaho.edu](mailto:rlatshaw@uidaho.edu)

**Description:** This class is for Summer Session Faculty EPAF's ONLY. In this session you will review categories, dates, salary calculations and go over scenarios.



# Student

## Student Information Query

**Type:** Online

**Prerequisite:** Banner Navigation—active Banner account

**Contact:** Chris Menter ☐ 208-885-2029 ☐ [cmenter@uidaho.edu](mailto:cmenter@uidaho.edu)

**Description:** This training covers student record information from admission through graduation for administrative personnel.

Completion of Student Information Query modules 1-4 are required for any access consideration. Optional module 5 is for users who are responsible for creating the departmental class schedule. Links to these modules are provided upon registration for Student Information Query.

Training manuals are available on the Registrar's website: [www.uidaho.edu/registrar/faculty/training](http://www.uidaho.edu/registrar/faculty/training).

Access requests will be reviewed for consideration upon completion of the minimum requirements.

## Student Reporting

**Type:** Online

**Prerequisite:** Student Information Query

**Contact:** Chris Menter ☐ 208-885-2029 ☐ [cmenter@uidaho.edu](mailto:cmenter@uidaho.edu)

**Description:** Student reporting training is designed for academic college and department administrative personnel to generate student data reporting.

The Student Reporting module is an overview of generating Banner reports. The individual report tutorials detail how to generate each specific report.

Training manuals are available on the Registrar's website: [www.uidaho.edu/registrar/faculty/training](http://www.uidaho.edu/registrar/faculty/training).

Access will be reviewed for consideration upon completion of the training.