

University of Idaho Banner Train Track

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



Professional Development and Learning

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Table of Contents

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

- 3: Introduction (Banner account setup)
- 4: Advancement/Alumni Module
- 5-6: Finance Module
- 7-8: Human Resources Module
- 9: Student Module

Introduction

Professional 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.*

Resources

- New users - [PDL 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.

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.

Advancement Alumni Forms

Type: One-one-One

Prerequisite: Banner Navigation—active Banner account

Contact: Irma Sixtos » 208-885-8973 » irmas@uidaho.edu

Description: This training is for personnel with a need to access Advancement/Alumni information through Banner forms. The training provides instruction to query and navigate through the different forms (sub modules) such as APASBIO. New hires to the Advancement area are trained on this module along with FERPA.

Advancement Argos

Type: One-one-One

Prerequisite: Advancement Alumni Forms

Contact: Patricia Bartholomew » 208-885-9816 » pcbartholomew@uidaho.edu

Description: This training is for personnel with the need to access Advancement\Alumni information through Argos software. The Argos software enables users to access data from the Advancement database in real time. Primarily targeted at Development Officers, this training is designed to get the trainee setup with Argos and get them comfortable pulling data that satisfy their business needs.

Advancement Prospect

Type: One-one-One

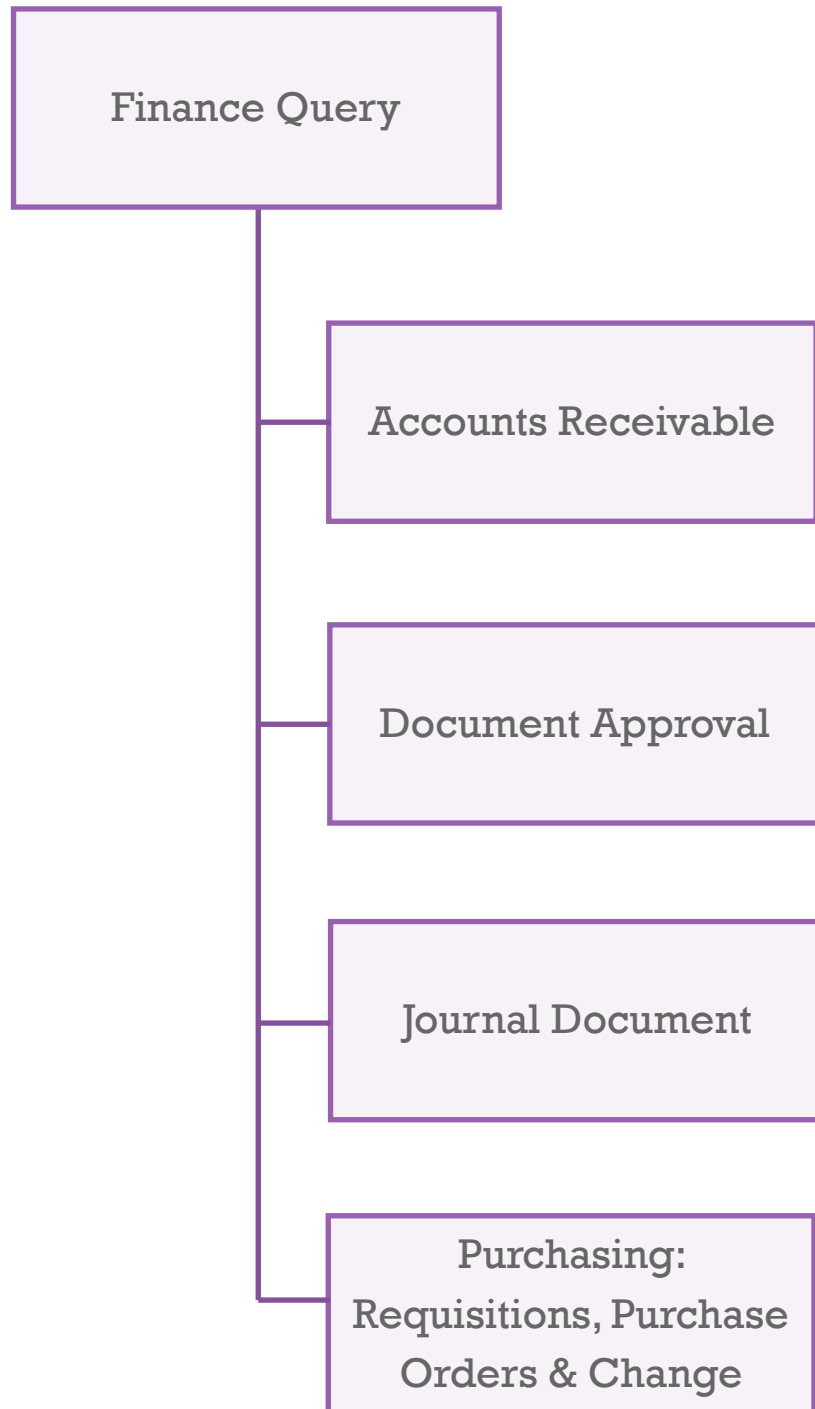
Prerequisite: Advancement Argos

Contact: Trevor Price » 208-885-5207 » devres@uidaho.edu

Description: This training covers where and how to find prospect information in Banner/VandalWeb/Argos, entering/viewing contact reports in VandalWeb and/or Banner, and who to contact in Advancement Services with requests or updates.

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

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

Description: Cashiering process for department deposits.

Document Approval

Type: Online

Prerequisite: Finance Query

Contact: Linda Keeney >> 208-885-5379 >> 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

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

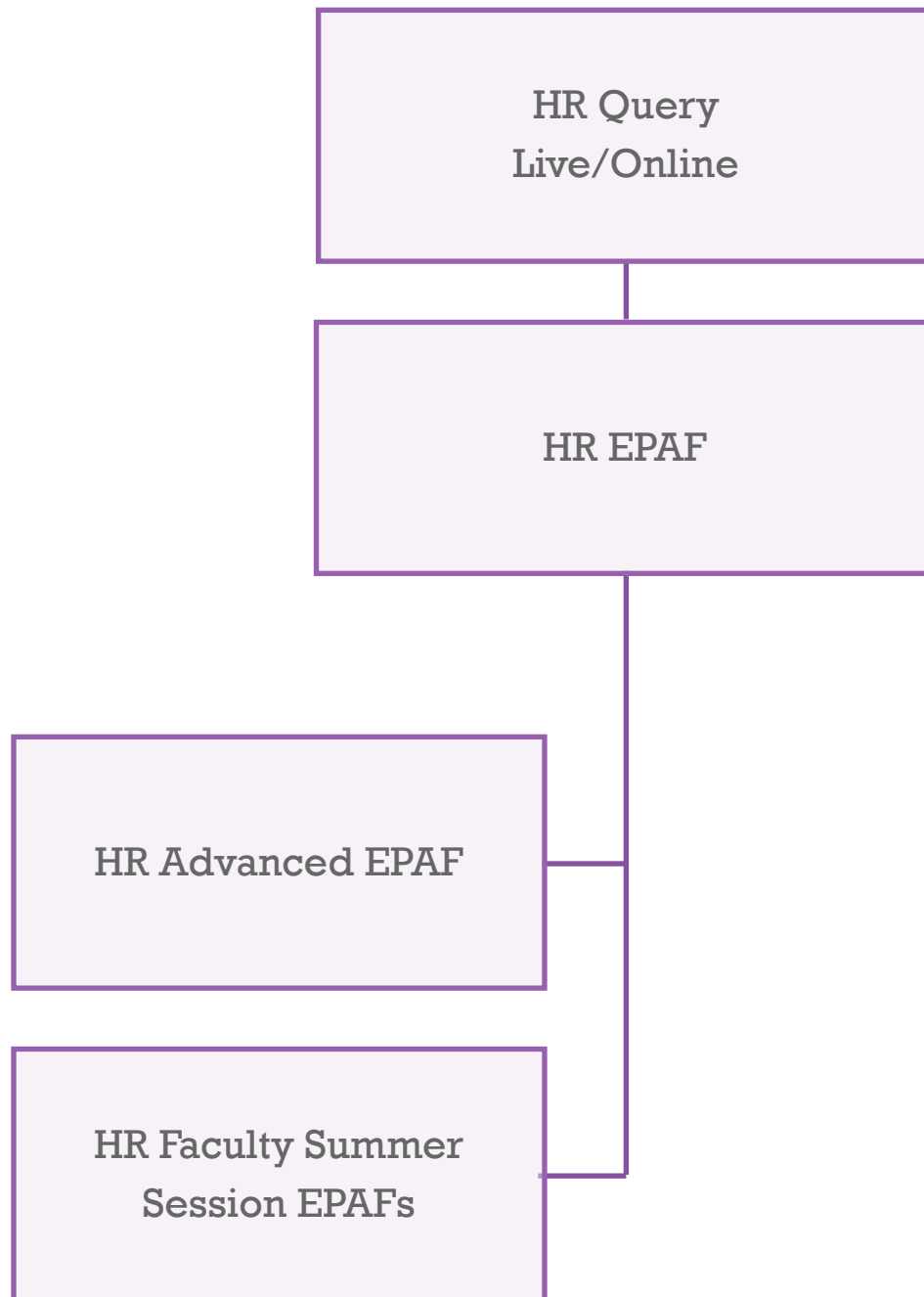
Type: One-on-one

Prerequisite: Finance Query

Contact: Julia McIlroy, Crystal Christopherson >> 208-885-6116 >> purchasing@uidaho.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



HR Query



Type: Online; live sessions scheduled periodically.

Prerequisite: Banner Navigation—active Banner account

Contact: Myung Chun >> 208-885-3728 >> mchun@uidaho.edu

Dan Noble >> 208-885-3677 >> 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, PEAEMPL, 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

Dan Noble >> 208-885-3677 >> danieln@uidaho.edu

Jill Robertson >> 208-885-7122 >> jrobertson@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.

HR Advanced EPAF

Type: Live

Prerequisite: HR EPAF

Contact: Myung Chun >> 208-885-3728 >> mchun@uidaho.edu

Dan Noble >> 208-885-3677 >> danieln@uidaho.edu

Jill Robertson >> 208-885-7122 >> jrobertson@uidaho.edu

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

HR Faculty Summer Session EPAFs

Type: Live (remote access available)

Prerequisite: HR EPAF

Contact: Myung Chun >> 208-885-3728 >> mchun@uidaho.edu

Dan Noble >> 208-885-3677 >> danieln@uidaho.edu

Jill Robertson >> 208-885-7122 >> jrobertson@uidaho.edu

Becky Latshaw >> 208-885-7045 >> 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

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.

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

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.

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