

MBUG 2023

Session Title: **Banner 9 Training Options for the End User**

Presented By: **Tamara Gibson**

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Institution:



MISSISSIPPI STATE UNIVERSITY™
INFORMATION TECHNOLOGY SERVICES



September 12, 2023 @ 8:30 – 9:15 a.m.

IP Casino Resort Spa – Ballroom D

Biloxi, Mississippi

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



Session Overview

This session will review the resources, tools and processes involved in setting up a training program for your users. It will review instructor-led training and online training using Canvas.

- **Determining Training Needs**
- **Exploring Different Training Modules**
 - **User Guides/Handouts**
 - **Video Guides**
 - **Instructor-Led Training**
 - **Online Training using an LMS**
- **Support for the End User**



Training Considerations

WHY OFFER TRAINING AT ALL?

- ▶ Rationale for training
 - Smoother transitions to learning the system
 - Easier to let go of the “old system/old way”
 - Job success
 - Users have more self-confidence
 - Work is more efficient and productive
 - Comfortable providing feedback to improve workflows/processes
 - Limited need for support
 - Users become self-sufficient
 - Able to efficiently train new users in-house



Planning for Training

- ▶ Define the problem
- ▶ Determine objectives and outcomes
 - ▶ Needs assessment
- ▶ Personnel organization
 - Availability: What is the time commitment?
 - Form a team/committee for consistency
 - Functional & Technical Members
 - Dedicated trainer available?
 - Consideration of skill sets
 - ▶ Reporting structure
- ▶ Evaluate Training Resources
 - Software available (site licenses)
 - Lab space (dedicated or shared)
 - Layout, equipment, peripherals
 - Printing options (in-house, vendor)
 - Funding



Training Challenges

- Identifying users for training
 - All users/departments, business managers, functional areas, etc.
- What products/processes in Banner will be covered?
- What training parameters will work best?
 - Determine delivery method
 - Registration required?
 - Training optional/mandatory?
 - Frequency of training
 - Program evaluation tools
 - Long term goals
- Communication channel considerations:
 - Online, email, social media, mailouts



Training Delivery Mediums

NEXT QUESTION:

Which training model best fits our needs?

- ▶ Customized User Guides Option
 - ▶ Handouts/Factsheets
 - ▶ User Manual
 - ▶ Video Tutorials
 - ▶ Webinars (live, on-demand)
 - ▶ Service/Product Provider Training
- ▶ Instructor-Led Training (ILT) Option
 - Hands-on
 - Individualized learning
- ▶ Online Training using a LMS Option



Customized User Guides Option

- ▶ 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 (cutepdf.com)
- ▶ Video Production (live, on-demand)
 - Camtasia
 - Microsoft PowerPoint
 - WebEx, Zoom, Teams



Customized User Guides Option

- ▶ Requires writing, page layout, video, and/or editing skills
- ▶ Develop a template
 - ▶ Same voice
 - ▶ Consistent look and feel
 - ▶ Ease of use
- ▶ Delivery of guides
 - ▶ Publish online
 - ▶ Deliver via email announcements
 - ▶ Provide hard copy

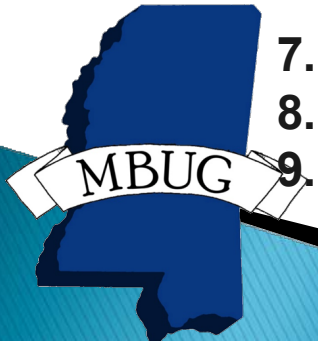


Customized User Guides Option

▶ Video Production

▶ Live or On-Demand (pre-recorded)

1. **Define the Problem:** training might aim to solve a noticeable performance gap
2. **Determine Measurable Outcomes**
3. **Design a Relevant and Interactive Program:** if your audience isn't paying attention, what's the point?
4. **Set Participants up for Success: Prepare before they start**
5. **Ensure Everyone Knows the Expected Outcomes**
6. **Use Platform Tools Creatively**
 - Polls for conversation starters.
 - Chat for group conversations.
 - Webcams for deeper dialogue.
 - Whiteboards for team collaboration.
 - Breakouts for practice and feedback.
7. **Ask the Right Follow-Up Questions**
8. **Check for Application**
9. **Focus on Changed Behaviors**



Customized User Guides Option

[Solutions](#)[Services](#)[Customer Stories](#)[Resources](#)[Company](#)[Schedule a Demo](#)

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Training Services

Engaging and comprehensive product training to support your organization.

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MSU Customized User Guide Examples

- ▶ Variety of Factsheets, User Guides, Handouts, Webpages, Videos, Webinars
- ▶ Published online
 - ▶ Website
 - ▶ Knowledge Base Articles
- ▶ Team of authors/editors specific to subject matter
 - ▶ Procurement Card User Guide
 - ▶ Vendor Guide
 - ▶ RPA Training Resources
 - ▶ ITS Documentation



MSU Admin Banner 9 Departmental User Manual

- ❖ Only accessible from Banner under My Links
- ❖ Living document
- ❖ 188 pages



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Administrative BANNER Departmental Users' Manual Version 9.x

Administrative BANNER is Mississippi State University's administrative software package, currently containing university finance, human resources, student and financial aid information.

This manual was created by User Training and Support to aid departmental users in understanding the use of online administrative tasks. In addition to this manual, User Training & Support also offers structured, hands-on classes for departments to receive instruction and practice in various areas of Administrative Banner. The training classroom is located at 10 McArthur Hall. The training schedule, as well as other related information, can be found on the ITS website at <http://www.its.msstate.edu>.

If you have questions about using Administrative Banner, contact the Service Desk:

Phone(662) 325-0631 or (888) 398-6394
Fax (662) 325-1832
In Person..... 108 Allen Hall
Email servicedesk@msstate.edu
Web..... servicedesk.msstate.edu

**A publication of User Training and Support in User Services,
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**Steve Parrott, Chief Information Officer
Teresa McMurray, Director of User Services
Tamara Gibson, Editor**

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Instructor–Led Training (ILT) Option

- ▶ Facilitated by an instructor in a classroom setting.
- ▶ ILT allows learners and instructors/facilitators to interact and discuss the training material individually or in a group setting.

ILT Considerations:

- ▶ Training Environment for Banner
- ▶ Identify dedicated trainer or team
- ▶ Involve Subject Matter Experts (SME)
- ▶ Develop Curriculum/Lesson Plan
- ▶ Provide Training Materials
- ▶ Create and post a Training Schedule
- ▶ Reserve training space and/or equipment
 - ▶ Participants bring their own equipment?
- ▶ Use a Registration system/tool
- ▶ Evaluation Tool – survey, evaluation
- ▶ Provide training certification and recordkeeping



MSU Instructor-Led Training Program

History of Banner Training:

- ▶ Implemented Banner July 1, 1993 (30 years)
- ▶ Training Offered from 1993 – Present
- ▶ Two (2) dedicated trainers from 1993–2006
 - ▶ 2006–Present > one (1) dedicated trainer
- ▶ Training database maintained by ITS
- ▶ Dedicated lab (15 participants + presenter)
- ▶ Available to all MSU employees (staff, admins)
- ▶ Prior to June 2023, training was mandatory before keying access was granted
- ▶ Currently training is no longer required to gain access



MSU Instructor-Led Training Program

- ▶ Monthly rotation of five (5) in-person classes
 - General *(monthly, except December & June)*:
 - Navigation & Financial Query Class, 8:30 am – 12:00 pm
 - Finance *(monthly, except December, May & June)*
 - Requisitions Class (2 days), 8:30am–4:00 pm
 - **Presentations: Procurement & Contracts/Procard Office**
 - Invoice Processing Class (1 ½ days),
8:30 am – 3:00 pm, 8:30 am – 12:00 pm
 - **Presentation: Accounts Payable**
 - Human Resources *(bi-monthly, except December & June)*
 - Payroll Time Entry, 9:30 am – 12:00 pm
 - **Presentation: Human Resources**
 - Leave Entry with eForms, 8:30 am – 3:00 pm
 - **Presentations: Internal Audit, Human Resources**



MSU Instructor-Led Training Program

- ▶ Class prerequisites exist:
 - ▶ Navigation Class required as the first class
 - ▶ Requires an Admin Banner Production account
 - ▶ Requisitions Class required before taking the Invoice Processing Class
- ▶ Monthly Schedule posted online
- ▶ Registration system built by ITS
 - ▶ Registration is REQUIRED
 - ▶ Send class emails (reminders, announcements)
 - ▶ Print class rosters and reports
 - ▶ Keeps training history of classes and users
 - ▶ Evaluation data
- ▶ Hands-on training using Banner Training Database
- ▶ Provide all class materials: Class Booklet, Handouts, PPT Handouts, Quiz, Keying Examples, etc.
- ▶ Class Evaluation Required
- ▶ Certificate of Completion provided



MSU Instructor-Led Training Program

TRAINING DATA:

- ▶ Fiscal Year 23: July 1 – June 30
 - 41 ILT BANNER classes
 - 311 participants completed training
 - Not a unique participant total

ITS Workshop Registration



ITS Training Lab



ITS Training Lab



SMART Podium Interactive Pen Display



SMARTTECH.COM



MSU Instructor-Led Training Program Registration Database

Information Technology Services
Access Control Page

Start Date **Jul-1-2022** 2022-07-01

End Date **Sep-10-2023** 2023-09-10

View Course Evaluation Statistics

Load People into the Course

Print Attendance Sheet

Edit the Course

Waiting on completion of another class.

Enrollment Management

Email the Class

Print Certifications

Print Custom Certifications

NetId

View Person's Record

Maximum Class Size

Seats Left

Enrolled

Waiting

Canceled

No Show

Completed

Could Not Complete or Course Canceled

Who Can Attend

Course Type

Workshop Title

Date
[D-M-Y]

Time

Entry Status

Courses that started before today.

						595	ADMIN BANNER - Navigation and Financial Query	07-Jul-2022	From: 8:30 am Until: 12:00 pm	Listed	15	1	0	0	3	0	14	0	MSU Staff & Administration
						596	ADMIN BANNER - Payroll Time Entry	12-Jul-2022	From: 9:30 am Until: 12:00 pm	Listed	15	3	0	0	1	0	12	0	MSU Staff & Administration
						644	ADMIN BANNER - Leave Entry with eForms	14-Jul-2022	From: 8:30 am Until: 3:00 pm	Listed	14	2	0	0	1	0	12	0	MSU Staff & Administration
						597	ADMIN BANNER - Requisitions (2 Day Class)	S: 19-Jul-2022 E: 20-Jul-2022	From: 8:30 am Until: 4:00 pm	Listed	14	1	0	0	5	0	13	0	MSU Staff & Administration
						593	ADMIN BANNER-Invoice Processing (1 1/2 Day Class)	S: 27-Jul-2022 E: 28-Jul-2022	From: 8:30 am Until: 12:00 pm	Listed	14	2	0	0	4	0	12	0	MSU Staff & Administration
						595	ADMIN BANNER - Navigation and Financial Query	03-Aug-2022	From: 8:30 am Until: 12:00 pm	Listed	15	6	0	0	3	1	9	0	MSU Staff & Administration
						597	ADMIN BANNER - Requisitions (2 Day Class)	S: 10-Aug-2022 E: 11-Aug-2022	From: 8:30 am Until: 4:00 pm	Listed	15	7	0	0	1	0	8	0	MSU Staff & Administration
						593	ADMIN BANNER-Invoice Processing (1 1/2 Day Class)	S: 23-Aug-2022 E: 24-Aug-2022	From: 8:30 am Until: 12:00 pm	Listed	15	8	2	0	3	0	5	0	MSU Staff & Administration

MSU Instructor-Led Training Program Registration Database

Enrollment Sheet

Course Type:	597 - ADMIN BANNER - Requisitions (2 Day Class)	Date :	July 18,-19 2023
Workshop Title:	ADMIN BANNER - Requisitions (2 Day Class)	Time:	8:30 am - 4:00 pm
Who can attend?:	MSU Staff & Administration	Course Status:	Listed
Class Size:	15/	Seats Left:	5
Presenter:	tpg1	Location:	McArthur Hall - Lab B
First Facilitator:		Course Code:	24325
Second Facilitator:		Course Eval Key:	rjpsbh4ztv
Prerequisites :	ADMIN BANNER - Navigation and Financial Query OR CANVAS Admin Banner - Navigation and Financial Query Course		
Lockouts :	This course is not for Affiliates. This course is not for Undergraduate students. This course is not for Graduate students. This course is not for Unpaid Graduate Students.		

Enrolled

ADMIN BANNER - Requisitions (2 Day Class) ~ July 18-19, 2023

Initial	NetID:	Name: Last, First	Title	Department:	Time of Enrollment
	hes154	Bell, Hannah	Asst Director, Bus Operati	Athletics - Business Office	Jun 26, 2023 13:54
	jcb733	Bray, Jasmine	Administrative Assistant I	Poultry Science	Jul 05, 2023 15:13
	tmc71	Clark, Tina	Business Coordinator	NRTC-Nat'l Research Ctr Bl	Jul 05, 2023 11:45
	kad250	Doss, Khaleah	Business Coordinator	Financial Aid	Jul 07, 2023 11:45
	mmo1	Foley, Marilyn	Business Coordinator	Police - Life Safety	Jun 08, 2023 16:06
	qtv2	Halford, Taylor	Administrative Assistant I	Animal & Dairy Science	Jun 20, 2023 13:44
	ldm7	Rice, Lodina	Administrative Assistant I	Geosciences	Jul 10, 2023 15:44
	ncr2	Robertson, Carey	Administrative Assistant I	Interior Design	Jun 16, 2023 16:15
	dms241	Smith, Doris	Administrative Assistant I	Landscape Architecture	Jun 09, 2023 11:48
	dat290	Torres, Daniela	Coord of Recruiting Ops	Athletics - Football	Jun 14, 2023 10:53

MSU Instructor-Led Training Program



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CERTIFICATE OF COMPLETION

Hannah Bell

Athletics - Business Office

Has Completed the Workshop

ADMIN BANNER - Payroll Time Entry

September 14, 2023

Instructor Tamara Gibson



Online Training using an LMS Option

“...Virtual classrooms aren’t new; they’ve been a viable learning solution for over 20 years. However, in 2020, this learning modality skyrocketed to the forefront of almost every organization’s mind. What was once a backup option quickly became the star of the show”.

Published in Training Industry Magazine, Jan/Feb 2021

- **Learning Management Systems (LMS) provide a centralized hub for learning and development**
 - allows employees to access the training and resources they need to adopt new tools and technologies.
- **One of the key benefits of an LMS is the ability to deliver learning content in a user-friendly and accessible manner**
- **LMSs also help administrators provide learning at the point of need**
 - Learners need to access the resources they need quickly and easily when adopting new digital tools



Online Training using a LMS Option

Key LMS Features for Online Training

- **Personalized learning paths:**
 - Ensures that employees receive relevant, targeted learning.
- **Interactive and engaging content:**
 - Includes videos, quizzes, gamified elements, and simulations that promote active participation and knowledge retention.

Ways to ensure successful LMS implementation and adoption

- **Clear communication and training:** Communicate the LMS's purpose and benefits, provide effective training on how to use the LMS, and outline the role of the LMS for skills development.
- **Leadership buy-in and support**
- **Continuous monitoring and evaluation:** Regularly monitor and evaluate the LMS's effectiveness, track user engagement, collect feedback and make any necessary adjustments.
- **Recognition and rewards:** Consider digital fluency in performance evaluations, provide incentives and recognize employees for their efforts in developing digital skills.



Online Training using a LMS Option

Benefist of using an LMS for Online Training

- **Reduced cost.** Travel and lodging costs can be reduced or eliminated completely.
- **Convenience.** Users can choose when and where they would like to participate in training courses – whether they are at home, in the office, or on their mobile devices.
- **Modular design.** Training content is offered in short, incremental modules, which can be completed independently or in combination with other courses or curricula.
- **Increased capacity and scalability.** Accommodates large numbers of users without increasing the amount of materials or space needed in typical ILT settings.
- **Increased diversity.** Users from a variety of culture and geographic backgrounds can participate simultaneously.



MSU Online Training Program

- ▶ Launched July 13, 2023
- ▶ Created as an external course
- ▶ Self-enrollment for Employees
- ▶ Available to all MSU employees (staff, admins)
- ▶ Created one Administrative Banner Master Course
 - ▶ Self-paced
 - ▶ No course prerequisites (order recommended)
 - ▶ Includes all five (5) Banner ILT classes
 - ▶ Designed content in “chunks”
 - ▶ Diverse materials: handouts, booklets, video, PowerPoints, supplemental documents
- ▶ Refresher courses for ILT classes



Logged over 800 hours on the project





EXT TERM

Home

Grades

Adobe Creative Cloud

Administrative Banner Training [Self Enroll]

View Course Stream

View Course Calendar

View Course Notifications

To Do

Nothing for now



Welcome to the Canvas Self Enroll Administrative Banner Training Master Course!

Information Technology Services (ITS) has designed this master course to include six (6) self-paced courses to train departmental users to use Administrative Banner 9 with efficiency and confidence. The target audience is beginner users with no previous experience in Banner or those who would like a refresher. There are three (3) training tracks in the **Canvas Self Enroll Administrative Banner Training Master Course** are outlined below:

GENERAL TRACK

- [Navigation and Financial Query Course](#) - Learn to navigate, search, view financial query pages, print reports and much more

HUMAN RESOURCES (HR) TRACK

- [Payroll Time Entry Course](#) - Learn to key semi-monthly payroll for non-exempt employees and print payroll vouchers
- [Leave Entry with eForms Course](#) - Process leave for employees and print reports to reconcile leave monthly

FINANCE TRACK

- [Requisitions Course](#) - Key orders for services, equipment and/or supplies
- [Invoice Processing \(Regular and Direct Pay\) Course](#) - Process payments on a purchase order and key direct payments to vendors
- [Direct Pay Invoice Processing Course](#) - Process vendor statements as direct payments



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
 - Bannerlink



Questions



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