

Banner 7 Computer Based Training Course Catalog

Updated 04/29/09



SUNGARD HIGHER EDUCATION

What can we help you achieve?

SunGard Higher Education
4 Country View Road
Malvern, Pennsylvania 19355
United States of America
(800) 522 - 4827

Customer Support Center website
<http://connect.sungardhe.com>

Distribution Services e-mail address
distserv@sungardhe.com

Other services

In preparing and providing this publication, SunGard Higher Education is not rendering legal, accounting, or other similar professional services. SunGard Higher Education makes no claims that an institution's use of this publication or the software for which it is provided will insure compliance with applicable federal or state laws, rules, or regulations. Each organization should seek legal, accounting and other similar professional services from competent providers of the organization's own choosing.

Trademark

Without limitation, SunGard, the SunGard logo, Banner, Campus Pipeline, Luminis, PowerCAMPUS, Matrix, and Plus are trademarks or registered trademarks of SunGard Data Systems Inc. or its subsidiaries in the U.S. and other countries. Third-party names and marks referenced herein are trademarks or registered trademarks of their respective owners.

Notice of rights

Copyright © SunGard Higher Education 2005-8. This document is proprietary and confidential information of SunGard Higher Education Inc. and is not to be copied, reproduced, lent, displayed or distributed, nor used for any purpose other than that for which it is specifically provided without the express written permission of SunGard Higher Education Inc.



Think before you print.

Table of Contents

Banner 7 CBT Courses	4
Acknowledgement Processing Using Banner 7	5
Admissions Processing Using Banner 7	6
Banner 7 Advancement System Overview	7
Banner 7 Finance System Overview	8
Banner 7 Financial Aid System Overview	9
Banner 7 Fundamentals	10
Banner 7 Human Resources System Overview	11
Banner 7 Student System Overview	12
CAPP Using Banner 7	13
Common Matching Using Banner 7	14
Fiscal Year-End Processing Using Banner 7	15
Event Management Using Banner 7	16
Letter Generation Using Banner 7	17
Payroll Processing Using Banner 7	18
Population Selection Series for Banner 7	19
Processing Non-Student Receivables Using Banner 7	20
Purchasing Using Banner 7	21
Registration Fee Assessment Using Banner 7	23
Spreadsheet Budgeting Using Banner Finance 7	24
Student Payment Processing Using Banner 7	25
Transfer Articulation Using Banner 7	26
Luminis Platform CBT Courses	27
Luminis Platform IV Training for Content Administrators	28
Luminis Platform IV Training for End Users	29
Luminis Platform IV Training for Technical Users	30
Luminis Platform IV – Banner 7 Functional Integration Overview	31

Banner 7 CBT Courses



Acknowledgement Processing Using Banner 7

Course Description

Acknowledgement Processing Using Banner 7 shows end users how to create an acknowledgement using Banner letter generation forms, identify records to acknowledge, extract data, and produce a download file.

The course features real-world scenarios, simulations, a procedural flow chart, screen shots, job aids and a glossary. Scenarios are used to set the stage for learning and describe real-life situations the advancement staff will encounter as they perform acknowledgement processing in their Banner Advancement system. Simulations allow learners to observe and perform each procedure in Banner. The process flowchart visually depicts the process flow that the staff would follow to perform acknowledgement processing. Screen shots are also provided as visual aids that allow learners to view the actual forms. The job aids detail the step-by-step procedures the learner will encounter when completing procedures in Banner.

Prerequisites

- Completion of the Education Practices CBT tutorial “Banner 7 Fundamentals” or equivalent experience navigating in the Banner system.
- Familiarity with the components of a letter
- Familiarity with merge techniques (such as those of Microsoft® Word) to create a letter outside of Banner

Topics

- Defining Letter Codes and Paragraph Codes
- Creating Variables
- Creating Paragraphs and Letters
- Establishing Acknowledgement Rules
- Identifying Records to Acknowledge
- Extracting Data
- Producing a Data File
- Generating Gift Replacements
- Personalizing My Banner

Duration

3 hours

Admissions Processing Using Banner 7

Course Description

Admissions Processing Using Banner 7 details three different paths used in admissions processing. The three paths include: Applicant to Student, Recruit to Applicant to Student and Quick Admit.

This CBT includes sections based on the procedures that are to be followed for each of the admissions processing paths. Scenarios in each section are used to set the stage for learning and describe real-life situations the admissions clerks will encounter as they enter prospects, recruits and/or applicant information into their Banner Student system. Lessons contained in the sections provide detailed explanations of each of the forms involved. These lessons are then reinforced with a simulation as well as a printable job aid to guide the learner in completing each of the admissions processing paths in the Banner system on their own. A new section has been added to demonstrate three different ways to streamline admissions processing.

This course is designed for admissions and recruiting office staff.

Prerequisites

Successful completion of the *Banner 7 Fundamentals* and the *Common Matching* CBTs or equivalent experience navigating in Banner

Topics

- Admissions Processing Overview
- Entering a Recruit
- Working with Applicants
- Converting a Recruit to an Applicant
- Performing a Quick Admit
- Streamlining Admissions Processing

Duration

4 hours

Banner 7 Advancement System Overview

Course Description

Banner 7 Advancement System Overview is designed for individuals who need an overall understanding of the Banner Advancement System. The goal of the course is to provide learners with an overview of the Banner Advancement module processes, menus, and terminology.

The course will demonstrate how to navigate through the Banner Advancement main and sub-menus and explain the purpose of each module. In addition, an interactive demonstration of creating QuickFlows and how they can be used in the Advancement system will be presented. Learners will be able to practice creating QuickFlows in a simulated environment.

The course also includes printable job aids that can be used as a quick reference guide to the Banner Advancement system. Unfamiliar terms are easily accessible from a glossary.

Prerequisites

Successful completion of the *Banner 7 Fundamentals* CBT or equivalent experience navigating within Banner

Topics

- Advancement System Process
- Advancement System Interfacing Capabilities
- High-level Menu Overview
- Sub-Menu Overview
- Creating QuickFlows

Duration

3 hours

Banner 7 Finance System Overview

Course Description

Banner 7 Finance System Overview is designed for individuals who need an overall understanding of the Banner Finance System. The goal of the course is to provide learners with an overview of the Banner Finance module processes, menus, and terminology.

The course will demonstrate how to navigate through the Banner Finance main and sub-menus and explain the purpose of each module. In addition, an interactive demonstration of creating QuickFlows and how they can be used in the Finance system will be presented. Learners will be able to practice creating QuickFlows in a simulated environment.

The course also includes a printable job aid that can be used as a quick reference guide to the Banner Finance system. Unfamiliar terms are easily accessible from a glossary.

Prerequisites

Successful completion of the *Banner 7 Fundamentals* CBT or equivalent experience navigating within Banner

Topics

- Finance System Process
- Finance System Interfacing Capabilities
- High-level Menu Overview
- Sub-Menu Overview
- Creating QuickFlows

Duration

3 hours

Banner 7 Financial Aid System Overview

Course Description

Banner 7 Financial Aid Overview computer-based training (CBT) is designed for individuals who need an overall understanding of the Banner 7 Financial Aid System. The goal of the course is to provide learners with an overview of the Banner Financial Aid module processes, menus, and terminology.

The course will demonstrate how to navigate through the Banner Financial Aid main and sub-menus and explain the purpose of each module. In addition, an interactive demonstration of creating QuickFlows and how they can be used in the Financial Aid system will be presented. Learners will be able to practice creating QuickFlows in a simulated environment.

The course also includes printable job aids that can be used as a quick reference guide to the Banner Financial Aid system. Unfamiliar terms are easily accessible from a glossary.

Prerequisites

Successful completion of the *Banner 7 Fundamentals* CBT or equivalent experience navigating within Banner

Topics

- Financial Aid System Process
- Financial Aid System Interfacing Capabilities
- High-level Menu Overview
- Sub-Menu Overview
- Creating QuickFlows

Duration

2 hours

Banner 7 Fundamentals

Course Description

Banner 7 Fundamentals is designed for all beginner Banner users. It is also suitable for new hires, executives, anyone who is upgrading from a previous version, or for those who need a refresher in the basics of Banner. This CBT provides the foundation for using Banner 7. After successful completion, learners will be familiar with Banner's interface and components, and will be able to navigate in the Banner System.

Prerequisites

Familiarity using a computer and mouse and with Microsoft Windows navigation

Topics

- Banner and related products
- The Unified Digital Campus
- Banner user interface
- Forms and navigation
- Help features
- Customization including, user preferences, QuickFlows, and My Banner
- 7 features and differences

Duration

6 hours

Banner 7 Human Resources System Overview

Course Description

Banner 7 Human Resources System Overview is designed for individuals who need an overall understanding of the Banner Human Resources system. The goal of the course is to provide learners with an overview of the Banner Human Resources module processes, menus, and terminology.

The course will demonstrate how to navigate through the Banner Human Resources main and sub-menus and explain the purpose of each module. In addition, an interactive demonstration of creating QuickFlows and how they can be used in the Human Resources system will be presented. Learners will be able to practice creating QuickFlows in a simulated environment.

The course also includes a printable job aid that can be used as a quick reference guide to the Banner Human Resources system. Unfamiliar terms are easily accessible from a glossary.

Prerequisites

Successful completion of the *Banner 7 Fundamentals* CBT or equivalent experience navigating within Banner

Topics

- Human Resources System Process
- Human Resources System Interfacing Capabilities
- High-level Menu Overview
- Sub-Menu Overview
- Creating QuickFlows

Duration

3 hours

Banner 7 Student System Overview

Course Description

Banner 7 Student System Overview is designed for individuals who need an overall understanding of the Banner Student System. The goal of the course is to provide learners with an overview of the Banner Student module processes, menus, and terminology.

The course will demonstrate how to navigate through the Banner Student main and sub-menus and explain the purpose of each module. In addition, an interactive demonstration of creating QuickFlows and how they can be used in the Student system will be presented. Learners will be able to practice creating QuickFlows in a simulated environment.

The course also includes a printable job aid that can be used as a quick reference guide to the Banner Student system. Unfamiliar terms are easily accessible from a glossary.

Prerequisites

Successful completion of the *Banner 7 Fundamentals* CBT or equivalent experience navigating within Banner

Topics

- Student System Process
- Student System Interfacing Capabilities
- High-level Menu Overview
- Sub-Menu Overview
- Creating QuickFlows

Duration

2 hours

CAPP Using Banner 7

Course Description

CAPP Using Banner 7 is designed for staff members who are responsible for student tracking toward degree or award completion. The goal of *CAPP Using Banner 7* is to provide you with the knowledge and practice to create an electronic degree auditing/compliance program at your institution.

The course provides both a Curriculum, Advising, and Program Planning (CAPP) overview and detailed step-by-step instructions. The course demonstrates how to use the forms and tools in the CAPP module to create an electronic degree auditing/compliance program. You will be able to practice creating each piece of a program in a simulated environment. Case studies will focus on application of the information presented. Job aids are available to support off-line learning and application.

Prerequisites

Successful completion of the *Banner 7 Fundamentals* CBT or equivalent experience navigating within Banner

Topics

- CAPP Overview
- CAPP Set Up
- Compliance and Testing
- Case Studies and Sample Exercises

Duration

20 hours

Common Matching Using Banner 7

Course Description

Common Matching Using Banner 7 is designed for individuals who are responsible for entering and maintaining person and non-person records in the Banner database, and for system administrators. The course provides guidelines and practice for using Banner's Common Matching process.

The course demonstrates how to set up the codes and rules needed for Common Matching and how to use Common Matching when entering person or non-person data. In addition, interactive demonstrations of the various tasks are presented. Learners are able to practice using the forms and procedures in a simulated environment.

The course also includes printable job aids that can be used as quick reference guides to the Common Matching process. Unfamiliar terms are easily accessible from a glossary.

Prerequisites

Successful completion of the *Banner 7 Fundamentals* CBT or equivalent experience navigating within Banner

Topics

- Duplicate Records Overview
- Common Matching Overview
- Creating Source Codes and Source Rules
- Working with Data Elements
- Defining Name Translation Rules
- Defining Common Matching Rules
- Completing User and Institutional Setup
- Querying for Matching Sources
- Using Online Common Matching
- Using Common Matching with Batch Loads

Duration

2 hours

Fiscal Year-End Processing Using Banner 7

Course Description

Fiscal Year-End Processing Using Banner 7 is an advanced self-paced, computer-based training course that provides you with the knowledge and practice to establish year-end closing processing schedules, roll General Ledger open account balances, define concurrent processing periods, roll encumbrances and remaining budgets, and close operating control accounts. The CBT contains process flows, demonstrations, and simulated practice opportunities.

This CBT features real-world scenarios, simulations, a procedural flow chart, screen shots, job aids and a glossary. Scenarios are used to set the stage for learning and describe real-life situations the accounting staff will encounter as they perform year end processing tasks in their Banner Finance system. Simulations allow learners to observe and perform each procedure, with or without guidance, in Banner. The process flow is an organized graphic that represents, in flowchart format, the fiscal year end processing procedure that is being described and the forms needed to complete each step. The flowchart visually depicts the process flow that the accounting staff would follow to perform fiscal year end closing. Screen shots are also provided as visual aids that allow learners to view the actual forms. The job aids detail the step-by-step procedures the learner will encounter when completing procedures in Banner.

This advanced course is designed for accounting staff that perform the year-end processing tasks.

Prerequisites

- Completion of the Education Practices CBT tutorials “Banner 7 Fundamentals” or equivalent experience navigating in the Banner System.
- Completion of these Banner Finance workbooks or equivalent experience in the Banner Finance System:
 - Chart of Accounts
 - Purchasing
 - Accounts Payable
 - Accounts Receivable

Topics

- Fiscal Year-End Processing Overview
- Preparing for Year-End Processing
- Performing the Fiscal Year-End Processing Tasks

Duration

6 hours

Event Management Using Banner 7

Course Description

Event Management Using Banner 7 is designed for individuals who are responsible for planning and managing institution events: commencements, open houses, conferences, and others. After completing the course, participants will be able to utilize the features and functionality in the Event Management module to manage events.

This course begins with an overview of the validation forms that are utilized within the Event Management module. A detailed scenario is then presented that walks the participant through the process of managing events using Banner.

Demonstrations and interactive simulations provide participants with an opportunity to either watch or perform related tasks. The tasks of assigning functions to an event, adding comments to a function, and tracking attendance are covered in this CBT.

This course also includes printable job aids that can be used as quick reference guides for performing processes in the Event Management module.

Prerequisites

Successful completion of the *Banner7 Fundamentals* CBT or equivalent experience navigating within Banner

Topics

- Validation Tables Overview
- Defining Buildings
- Defining Rooms
- Creating the Event
- Assigning Functions to an Event
- Using Comments
- Assigning Tasks
- Managing Participants
- Tracking Attendance
- Utilizing Query Forms

Duration

4 hours

Letter Generation Using Banner 7

Course Description

Letter Generation Using Banner 7 teaches you how to produce a letter or some other document for a particular population by extracting Banner data. The CBT begins with an overview of letter generation and a discussion of the two types of letters that can be produced. The CBT then focuses on how to create paragraph and letter codes, work with applications, build the content of paragraphs and letters, extract the data, and print a letter. A section on variables focuses on tasks such as creating simple and complex variable rules, copying variables, and creating joins.

All Banner 7 CBTs feature simulations, screen shots, job aids, and a glossary. Simulations allow you to observe and perform related procedures, with or without guidance, in two different modes. Screen shots are provided as visual aids that allow you to view the Banner letter generation forms. The printable job aids provide quick reference guides to Banner letter generation processes and forms, as well as tips and guidelines.

Prerequisites

- Successful completion of the *Banner 7 Fundamentals* CBT or equivalent experience navigating in Banner
- Familiarity with database concepts and naming conventions
- Identification of a population to receive the letter
- Familiarity with the merge techniques (such as those used in Microsoft Word) to create a letter outside of Banner if you choose to follow the download option

Topics

- Letter Generation Overview
- Setting Up Letter Generation
- Building Paragraphs
- Building the Letter
- Extracting the Data
- Printing the Letter
- Creating Variables
- Creating an Application

Duration

3 hours

Payroll Processing Using Banner 7

Course Description

Payroll Processing Using Banner 7 provides learners with the knowledge to validate earnings codes and hours, generate paychecks and direct deposit notices, update financial records, and adjust payroll transactions.

The course contains an introduction to the payroll process as well as an in-depth explanation on how to prepare for the payroll and the daily operations required in calculating, generating, and maintaining the payroll. In addition, interactive demonstrations detailing the various payroll functions are provided. These interactive demonstrations allow learners to participate in a simulated environment.

In addition, printable job aids are included that can be used as quick reference guides for performing critical functions within payroll processing. Unfamiliar terms are easily accessible from a glossary.

Prerequisites

- Successful completion of the *Banner 7 Fundamentals* CBT or equivalent experience navigating in Banner
- Familiarity with the Banner Human Resources product
- General understanding of position control and jobs records

Topics

- Payroll Processing Overview
- Setting Up Student Enrollment
- Tracking the Payroll Process in Banner
- Preparing for the Payroll
- Calculating Life Insurance
- Creating, Verifying, and Correcting Time Entry Records
- Recording Time
- Calculating the Payroll
- Processing Checks and Direct Deposits
- Updating Financial Records
- Adjusting the Payroll

Duration

5 hours

Population Selection Series for Banner 7

Course Description

The Population Selection Series is designed for individuals who are responsible for producing Banner reports or generating letters for specific populations. Throughout the course, demonstrations on how to perform specific tasks in Banner are provided. Learners can even practice performing these tasks in a simulated environment.

The course begins with an overview of the Banner database, which includes details about how data is stored and retrieved in Banner. Other lessons in the CBT teach learners how to create, extract, and view select groups of people, or "populations," from the data stored in Banner. Additionally, an optional section for advanced learners includes information on SQL to help in writing population selection rules.

The course also includes printable job aids, which contain tips for troubleshooting and building populations. Unfamiliar terms are easily accessible from a glossary.

Note: The series consists of Population Selection for Advancement, Population Selection for Financial Aid, and Population Selection for Student.

Prerequisites

- Successful completion of the Banner *7 Fundamentals* CBT or equivalent experience
- Familiarity with database concepts and naming conventions
- Experience with using standard query tools
- Familiarity with the Banner product module

Topics

- Entering and storing information in Banner
- Building population selection rules
- Extracting, viewing, and modifying populations
- Using SQL with population selection

Duration

4 hours

Processing Non-Student Receivables Using Banner 7

Course Description

Processing Non-Student Receivables Using Banner 7 is designed for institution staff responsible for collecting non-student receivables and performing related tasks. The course identifies the steps required to process non-student receivables based upon institutional rules as defined in Banner Accounts Receivable. Using scenarios, the course provides procedures and guidelines for setting up and processing receivables for non-student accounts. Additionally, applying and unapplying payments and running related processes are covered.

This course includes printable job aids that can be used as quick reference guides for performing payment processing tasks. Simulations guide the learners in completing the steps in the Banner system. Unfamiliar terms are easily accessible from a glossary.

Prerequisites

Successful completion of the *Banner 7 Fundamentals* and the *Student Payment Processing Using Banner 7* CBTs or equivalent experience navigating within Banner

Topics

- Payments
- Installment Plans
- Returned Checks
- Application and Unapplication of Payments
- Payment Audit History and Related Information
- Processes
- Recurring Non-Student Receivables
- Deposits
- Miscellaneous Transactions

Duration

5 hours

Purchasing Using Banner 7

Course Description

Purchasing Using Banner 7 is a self-paced, two-disc computer-based training course.

Disc 1: Requisitions Using Banner Self-Service 7 shows end users how to create a requisition using Banner Self-Service. *Disc 2: Purchasing Using Banner 7* shows the purchasing and procurement department the complete requisition, purchase order, receiving and invoice entry process. The CBTs contain process flows, demonstrations, and simulated practice opportunities.

This method of training delivery offers an institution and its employees the following benefits: training anytime and anywhere; consistent, repeatable training; increased learner control; and cost effective and efficient training. The two-disc format of this CBT course also has an additional benefit of providing two levels of training:

- Disc 1: short, focused training for employees who create requisitions in Banner Self-Service
- Disc 2: complete requisition to invoice entry process for the Purchasing and Procurement Department using Banner 7.

This CBT features real-world scenarios, simulations, a procedural flow chart, screen shots, job aids and a glossary. Scenarios are used to set the stage for learning and describe real-life situations the purchasing and procurement staff will encounter as they perform purchasing tasks in their Banner Finance system. Simulations allow learners to observe and perform each procedure in Banner. The process flowchart visually depicts the process flow that the purchasing and procurement staff would follow to perform purchasing tasks. Screen shots are also provided as visual aids that allow learners to view the actual forms. The job aids detail the step-by-step procedures the learner will encounter when completing procedures in Banner.

Prerequisites

Completion of the Education Practices CBT tutorial "Banner 7 Fundamentals" or equivalent experience navigating in the Banner System.

Topics

- **Disc 1: Requisitions Using Banner Self-Service 7**
 - Overview – The Req to Check Process
 - Creating a Requisition
 - Viewing a Requisition
 - Approving a Requisition
- **Disc 2: Purchasing Using Banner 7**
 - Purchasing Overview – The Req to Check Process
 - Requisitions
 - Buyer Assignment
 - Purchase Orders
 - Receiving and Invoices
 - Purchasing Queries

Duration for Disc 1

20 minutes

Duration for Disc 2

6 hours

Registration Fee Assessment Using Banner 7

Course Description

Registration Fee Assessment Using Banner 7 is designed for individuals in the Bursar and Registrar's Offices that deal with fee assessment.

The goal of this course is to help guide learners to build registration fee assessments and refunding rules, based upon their institutional guidelines.

The CBT takes the user through two scenario-based sections. The first scenario will teach the learner how to complete the setup forms necessary to ensure that fees are appropriately assessed. The second scenario takes the user through the steps of the actual fee processing. Once completed, the user will be able to set up and process fees accurately.

This course includes printable job aids that can be used as quick reference guides for performing fee assessment duties. Simulations guide the learners in completing the steps in the Banner system. Unfamiliar terms are easily accessible from a glossary.

Prerequisites

- Successful completion of the *Banner 7 Fundamentals: Forms and Navigation* CBT or equivalent experience navigating within Banner.
- Familiarity with the Banner Student product.

Topics

- Charge and Payment Code Setup
- Registration Assessment Setup
- Section Fees Setup
- Enrollment and Registration Status Control Setup
- Assessment Processing
- Assessment Audit History and Related Information
- Display Assessments and Payments

Duration

4 hours

Spreadsheet Budgeting Using Banner Finance

7

Course Description

Spreadsheet Budgeting Using Banner Finance 7 is designed for those individuals who are responsible for creating and maintaining budget information within Banner, as well as those who work with budgets outside of Banner, such as department heads and administrative staff.

The goal of the course is to provide learners with an understanding of the processes and procedures necessary for utilizing the Spreadsheet Budgeting enhancement.

This course contains a brief explanation of the hardware and software requirements as well as administrator tasks involved in setting up Spreadsheet Budgeting. An in-depth explanation of the features in Spreadsheet Budgeting including the Download, Validation, and Upload Wizard processes is provided as well. In addition, interactive demonstrations of the three Wizard features and various Spreadsheet Budgeting basics and are included. These interactive demonstrations allow learners to participate in a simulated environment.

This course also includes printable job aids that can be used as quick reference guides for performing critical functions in the Spreadsheet Budgeting enhancement. Unfamiliar terms are easily accessible from a glossary.

Prerequisites

- Successful completion of the *Banner 7 Fundamentals* CBT or equivalent experience navigating in Banner
- Familiarization with creating and maintaining budgets and phases in the Budget Development module.
- Experience in Microsoft Excel.

Topics

- Setting up Spreadsheet Budgeting
- Logging into, out of, and switching connections in a database
- FOAPAL Elements and Data Lookup Features
- Downloading data from Finance
- Validating the data
- Uploading data into Budget Development

Duration

4 hours

Student Payment Processing Using Banner 7

Course Description

Student Payment Processing Using Banner 7 provides guidelines and practice for setting up and processing student charges and payments in the Banner system.

This CBT includes sections based on the procedures that are to be followed for successfully configuring payment processing. Scenarios are used to set the stage for learning and describe real-life situations that personnel will encounter as they pre-define and manage payments. Lessons contained in the sections provide detailed explanations of each of the forms. These lessons are then reinforced with a simulation as well as a printable job aid to guide the learner in completing student payment processing in the Banner system on their own.

This course is designed for institution staff responsible for recording student payments.

Prerequisites

- Successful completion of the *Banner 7 Fundamentals* or equivalent experience navigating in Banner
- Familiarity with Banner Student, including Accounts Receivable.
- Successful completion of the *Registration Fee Assessment Using Banner 7* CBT is not required, but would be beneficial.

Topics

- Setting up and processing payments
- Defining and posting deposits
- Defining and calculating third party contracts
- Defining and calculating exemptions
- Defining and assigning installment plans
- Defining and processing returned checks
- Applying and unapplying payments
- Reviewing transactions

Duration

8 hours

Transfer Articulation Using Banner 7

Course Description

Transfer Articulation Using Banner 7 provides guidelines and practice for pre-defining and managing transfer credit at an institution.

This CBT includes sections based on the procedures that are to be followed for successfully articulating transfer information. Scenarios are used to set the stage for learning and describe real-life situations that personnel will encounter as they pre-define and manage transfer credit. Lessons contained in the sections provide detailed explanations of each of the forms. These lessons are then reinforced with a simulation as well as a printable job aid to guide the learner in completing the transfer articulation process in the Banner system on their own. A new section has been added to demonstrate three different ways to streamline transfer articulation.

This course is designed for registrar and admissions office staff.

Prerequisites

Successful completion of the *Banner 7 Fundamentals* or equivalent experience navigating in Banner

Topics

- Transfer articulation overview
- Setup of validation forms
- Defining transfer institution, transfer grades, and transfer courses
- Creating equivalency information
- Associating institution and courses to a student
- Case studies for defined and undefined institutions
- Methods for streamlining the Transfer Articulation process

Duration

3 hours

Luminis Platform CBT Courses



Luminis Platform IV Training for Content Administrators

Course Description

Luminis Platform IV Training for Content Administrators is designed for individuals responsible for entering and updating content. The purpose of this CBT is to provide content administrators with the requisite knowledge and skills to manage portal content. After successful completion, these individuals will be able to create the channels and content that will enable effective communication with the institution.

This course begins with an overview of channels, and how to create a personal layout and content customization. It teaches learners how to create skins, targeted announcements and targeted content channels. The CBT also instructs users how to publish channels and administer groups.

Demonstrations and interactive simulations provide participants with opportunity to either watch or perform related tasks. The tasks of creating a channel, creating a section, creating a sub-section and managing channels are covered in this CBT. This course also includes printable job aids that can be used as quick reference guides for performing processes as the Content Administrator.

Prerequisites

None

Topics

- Personal Layout and Content Customization
- Creating Skins
- Working with Targeted Announcements
- Creating Targeted Content Channels
- Publishing Channels
- Channel Management
- Managing Groups

Duration

3 hours

Luminis Platform IV Training for End Users

Course Description

Luminis Platform Training for End Users CBT prepares an institution's trainers, technology support personnel and all end users to take full advantage of all the features Luminis offers.

It teaches learners how to navigate in the Luminis system and apply personal layout and content customizations. Group and course elements are presented, including how to use content tools in the group and course studio. The CBT also allows users to utilize and manage e-mail features, and create events and tasks within the calendar application. In addition, interactive demonstrations detailing the various Luminis Platform functions are provided. These interactive demonstrations allow learners to participate in a simulated environment.

Printable job aids are included to be used as quick reference guides for performing critical functions within Luminis Platform. Unfamiliar terms are easily accessible from a glossary.

Prerequisites

- Ability to use a computer and mouse
- Familiarity with navigating in Microsoft Windows.

Topics

- Navigating in the Luminis system
- Applying personal layout and content customizations
- Using the Group and Course Studio
- Collaborating with group and course studio members
- Utilizing and managing the e-mail feature
- Creating events and tasks and utilize options in the calendar feature

Duration

4 hours

Luminis Platform IV Training for Technical Users

Course Description

The goal of the *Luminis Platform IV for Technical Users CBT* is to provide learners with an overview of Luminis Platform technical functionality.

This course is designed to provide an overview of how to use the technical functionality of Luminis Platform. The course discusses the user interface, the components of the system and how to best manage them, and how to interface with Luminis Platform in various ways from the command line. Backup and recovery strategies and troubleshooting procedures are discussed. Upgrades and hotfix patches and how to implement each are examined. Finally, you will see the options available to you to continue your Luminis Platform technical training.

Prerequisites

- Successful completion of the Education Practices computer-based training (CBT) *Banner 8 Fundamentals* or equivalent experience
- Recommended to:
 - users who are interested in attending the System Administration or SDK class
 - users who have content administration experience or who have already taken a *Luminis Platform for Content Administrators* CBT
 - beginner Luminis Platform technical users

Topics

- Pre-requisites for Luminis Platform Administration
- Introduction to the Luminis Platform
- Administration of the Luminis Platform
- Importing Users
- Luminis Platform Backup and Recovery
- Troubleshooting
- Upgrades, Patches and Hotfixes

Duration

- 4 hours

Luminis Platform IV – Banner 7 Functional Integration Overview

Course Description

Luminis Platform IV –Banner7 Functional Integration Overview is a self-paced, computer-based training course that provides you with the knowledge and practice to use Banner 7 forms that are integrated with the Luminis Platform IV to test the Luminis-Banner integration at your institution. At the end of this course, you will be able to create a course section, assign a faculty member to the course section, admit a student, and enroll the student in the course section. You will also be able to use Banner to trigger message events, such as holds, that appear in the Luminis Platform. And finally, you will be able to navigate in the Luminis Platform to verify the integration of Banner data.

The CBT contains process flows, demonstrations, simulated practice opportunities, and printable job aids.

This course is designed for IT professionals who need a high-level functional overview of Banner Student forms that are integrated with the Luminis Platform.

Prerequisites

- The Luminis Platform IV, Banner 7 Student , and Banner 7 Self Service systems are installed at your institution.
- IntComp 7.3 is installed and set up at your institution.

Topics

- Functional Integration Overview
- Banner Basics
- Faculty and Course Data
- Student Data
- Luminis Platform Basics

Duration

2 hours