

Computer Based Training Course Catalog

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Think before you print.

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Banner 8 CBT Courses



Banner 8 Fundamentals

Course Description

Banner 8 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 8. After successful completion, learners will be familiar with Banner's interface and components, and will be able to navigate in the Banner System.

All SunGard Higher Education CBTs feature simulations, screen shots, job aid(s), and a glossary. Simulations provide a See It in Action and an interactive Try It Yourself learning experience. Job aids are printable documents that can be used as quick reference guides.

Prerequisites

- Familiarity using a computer and mouse and with Microsoft Windows navigation

Topics

- Banner and related products
- The Unified Digital Campus
- Banner components
- Banner's user interface
- Forms and navigation
- Performing queries
- Help features
- Customization including user preferences, QuickFlows, and My Banner

Duration

3 hours

Banner 8 Advancement Overview

Course Description

Banner 8 Advancement Overview computer-based training (CBT) is designed for individuals who need an overall understanding of the Banner 8 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 the overall Advancement process, then explain the purpose of each module within the Advancement system. Next, users will see how to perform basic tasks in Banner Advancement and will get an opportunity to view and complete each task. 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 as well as practice performing basic Advancement tasks in a simulated environment.

The course also includes a printable job aid that can be used as a quick reference guide to the Banner Advancement system.

Prerequisites

Successful completion of the *Banner 8 Fundamentals* CBT or equivalent experience navigating within Banner.

Topics

- Advancement process
- High-level menu overview
- Basic advancement tasks
- Integration capabilities
- QuickFlows

Duration

2 hours

Banner 8 Finance Overview

Course Description

Banner 8 Finance Overview is designed for all beginner Banner Finance 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 Finance.

This CBT provides the foundation for using Banner 8 Finance. The Finance process is described and the purpose of each module is explained. Simulations show basic tasks performed in Banner Finance as well as provide the opportunity for learners to practice them. After successful completion, learners will be familiar with Banner Finance processes, menus, and terminology.

All SunGard Higher Education CBTs feature simulations, screen shots, job aid(s), and a glossary. Simulations provide a See It in Action and an interactive Try It Yourself learning experience. Job aids are printable documents that can be used as quick reference guides.

Prerequisites

Successful completion of the *Banner 8 Fundamentals* CBT or equivalent experience navigating within Banner.

Topics

- Banner Finance process
- High-level menu overview
- Basic finance tasks from requisition to check
- Integration capabilities

Duration

3 hours

Banner 8 Financial Aid Overview

Course Description

Banner 8 Financial Aid Overview computer-based training (CBT) is designed for individuals who need an overall understanding of the Banner 8 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 the overall Financial Aid process, then explain the purpose of each module within the Banner Financial Aid system. Next, users will see how to perform basic tasks in Banner Financial Aid and will get an opportunity to view and complete each task. In addition, an interactive demonstration of creating QuickFlows and how they can be used in the Banner Financial Aid system will be presented. Learners will be able to practice creating QuickFlows and performing basic Banner Financial Aid tasks in a simulated environment.

The course also includes a printable job aid 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 8 Fundamentals* CBT or equivalent experience navigating within Banner.

Topics

- Financial Aid process
- High-level menu overview
- Basic financial aid tasks
- Integration capabilities
- QuickFlows

Duration

2 hours

Banner 8 Human Resources Overview

Course Description

Banner 8 Human Resources Overview computer-based training (CBT) is designed for individuals who need an overall understanding of the Banner 8 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 the overall Human Resources process, then explain the purpose of each module within the Banner Human Resources system. Next, users will see how to perform basic tasks in Banner Human Resources and will get an opportunity to view and complete each task. In addition, an interactive demonstration of creating QuickFlows and how they can be used in the Banner Human Resources system will be presented. Learners will be able to practice creating QuickFlows and performing basic Banner Human Resources tasks 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 8 Fundamentals* CBT or equivalent experience navigating within Banner.

Topics

- Human Resources process
- High-level menu overview
- Basic human resources tasks
- Integration capabilities
- QuickFlows

Duration

2 hours

Banner 8 Student Overview

Course Description

Banner 8 Student Overview computer-based training (CBT) is designed for individuals who need an overall understanding of the Banner 8 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 the overall Student process, then explain the purpose of each module within the Banner Student system. Next, users will see how to perform basic tasks in Banner Student and will get an opportunity to view and complete each task. In addition, an interactive demonstration of creating QuickFlows and how they can be used in the Banner Student system will be presented. Learners will be able to practice creating QuickFlows and performing basic Banner Student tasks 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 8 Fundamentals* CBT or equivalent experience navigating within Banner.

Topics

- Student process
- High-level menu overview
- Basic human resources tasks
- Integration capabilities
- QuickFlows

Duration

2 hours

Admissions Processing using Banner 8 Student

Course Description

This course provides an overview of Banner 8 Admissions Processing and detailed step-by-step instructions for admissions processing.

Scenarios are used

- To demonstrate how to use the components and tools in Banner 8 Admissions Processing to handle recruit, standard applicant and continuing education applicant.
- To provide practice opportunities for entering recruits, standard applicants and continuing education applicant in a simulated environment.

A job aid is available to support learning and the application of concepts to required tasks.

Prerequisites

Before taking this CBT, you should have completed the following Training Services CBT tutorials or have equivalent experience navigating within Banner:

- *Banner 8 Fundamentals*
- *Common Matching Using Banner 7*

Topics

- Entering a recruit
- Working with applicants
- Converting a recruit to an applicant
- Performing a Quick Admit
- Streamlining admissions processing

Duration

3 hours

Banner Workflow 8 Overview

Course Description

Banner Workflow 8 Overview computer-based training (CBT) is designed as an introduction for staff members who are planning to learn how to create workflows and respond to Worklist items. The goal of the course is to provide learners with an overview of the Banner Workflow application, menus, and terminology.

The course will demonstrate the overall Banner Workflow functionality and provide the opportunity to see and practice high-level tasks and processes necessary to identifying, developing, and running a workflow. It will also provide the knowledge and practice to respond to workflow activities.

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

Prerequisites

A basic understanding of how workflows may be used in your institution and experience using a computer and mouse.

Topics

- Navigating in Banner Workflow
- Managing Users, Roles, and Security Groups
- Creating a Workflow Definition
- Drawing a Workflow Model
- Defining Activity Properties
- Validating a Workflow
- Completing Workflow Activities
- Reviewing Workflow Status
- Handling Alerts
- Integration capabilities

Duration

2-3 hours

Population Selection Series Using Banner 8

Course Description

The *Population Selection Series for Banner 8* is designed for individuals who are responsible for producing Banner reports or generating letters for specific populations. The course begins with an overview of the Banner database, including how data is stored and retrieved in Banner. The CBT focuses on how to create, extract, and view select groups of people, or "populations," from the data stored in Banner.

Each CBT has a module-specific training scenario (Student, Advancement, or Financial Aid) that reinforces the concepts and provides guided practice for creating specific populations based on multiple criteria in a simulated environment.

This CBT provides the foundation for using Banner 8.0 to create and extract populations based on specific criteria. Multiple hands-on simulated practice opportunities to create and manage population selections and view population selection results are provided.

All SunGard Higher Education CBTs feature simulations, screen shots, job aid(s), and a glossary. Simulations provide a See It in Action and an interactive Try It Yourself learning experience. Job aids are printable documents that can be used as quick reference guides.

Note: The series consists of Population Selection using Banner Student 8, Population Selection using Banner Advancement 8, and Population Selection using Banner Financial Aid 8.

Prerequisites

- Successful completion of the Education Practices computer-based training (CBT) Banner 8 Fundamentals or equivalent experience
- Familiarity with database concepts and naming conventions
- Experience with using standard query tools
- Familiarity with the Banner product module

Topics

- Introduction to Population Selection
- Defining Rules and Objects
- Using Population Selection
- Working with Population Selection Results

Duration

4 hours per CBT

Enrollment Management CBT Courses



Recruiting and Admissions Relationship Fundamentals using Banner Enrollment Management 1

Course Description

Recruiting and Admissions Relationship Fundamentals using Banner Enrollment Management 1 is designed for recruiting and admissions staff who need to manage population lists and individual profiles. It is also suitable for new hires, executives, anyone who is working with recruiting profiles, or for those who need a refresher in the basics of Recruiting and Admissions Relationships.

This CBT provides the foundation to use Recruiting and Admissions Relationships 1.0 to manage population lists and individual profiles. Multiple hands-on simulated practice opportunities to create and manage population lists and view individual profiles are provided.

All SunGard Higher Education CBTs feature simulations, screen shots, job aid(s), and a glossary. Simulations provide a See It in Action and an interactive Try It Yourself learning experience. Job aids are printable documents that can be used as quick reference guides.

Prerequisites

- None

Topics

- Overview and Navigation
- Working with Profiles
- Working with Population Lists
- Reviewing Funnels

Duration

2 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