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Prepared By: Wichita State University
Banner User Services

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Banner Training and Help Desk Plan, Phase II

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Mark Twain once said

“I knew a man who picked a cat up by the tail. He learned 40 percent more about cats than the man who didn't.”

During the implementation phase of Banner, we picked up a lot of cats and received a lot of scratches. We learned new techniques and made adjustments to keep us on the path to success.

Lessons Learned

The most valuable training lessons learned during Banner implementation were not those focused on the “how to” topics related to Banner training, WSU procedures or data entry.

Rather, we worked with our WSU community to identify their needs and to guide them as they use Banner in their day-to-day activities.

Key points

- Banner User Services and functional experts work closely to develop materials and presentations.
- Attendees have a variety of learning styles and skill levels.
- Pilot group feedback provides insightful information regarding presentations, learning guides, on-line help and other materials.
- Building Banner navigation into learning guides allow attendees to focus on each form's functionality and options. WSU procedures are also incorporated into training.
- Learning guides are written to accommodate both the frequent and infrequent Banner users.
- Banner training is required.
- After reviewing information such as the “How Do I…” guides, department support personnel provide valuable Banner channels and Self Services assistance to students and faculty.

Continued on next page
Lessons Learned, Continued

- Banner channels and Self Service training and support options are delivered in a variety of formats.
  - Training is strongly encouraged but not required.
  - Faculty options are supported through on-line help, telephone assistance and open labs.
  - The majority of students do not use Banner channels and Self Service options during regular business hours. On-line help must be clear, accurate and easily accessible.
  - Telephone support calls are reviewed to determine if additional documentation is needed.
<table>
<thead>
<tr>
<th>Section</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Banner Training and Help Desk Plan, Phase II</strong></td>
<td><strong>B</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Phase I</th>
<th>The original <em>Banner User Services Help Desk and Training Plan</em> provided the basis for the WIN project's training and help desk support.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase II</td>
<td><em>Banner Training and Help Desk Plan, Phase II</em> builds upon the concepts developed and lessons learned in Phase I. Improvements included in Phase II ensure continued quality Banner training and help desk support to the WSU campus community.</td>
</tr>
<tr>
<td>Where to locate the plans</td>
<td>The Banner training and help desk plans, Phase I and Phase II, are located on the WSU portal, <a href="http://myWSU.wichita.edu">http://myWSU.wichita.edu</a>. Select the Help for Faculty/Staff tab, Training Opportunities channel, Training Information.</td>
</tr>
<tr>
<td>Statistical information</td>
<td>Periodically, Banner User Services reports summarized training statistics in the WIN Communicator and other university communications.</td>
</tr>
<tr>
<td>Statistical information</td>
<td>Statistical information is posted on <a href="http://wichita.edu/WIN">http://wichita.edu/WIN</a>.</td>
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</tbody>
</table>
Banner User Services Responsibilities

Key functions
Banner User Services (BUS) was established in 2004 to provide training and support for the Wichita State University Information Network (WIN). BUS is responsible for:

- Banner Help Desk
  Management and operations of the Banner Help Desk

- Training
  Planning, development and delivery of curriculum

- Learning Resources
  Development and maintenance of training materials

- On-line Help
  Development and maintenance of Self Service and myWSU on-line help information

- Evaluation of help desk calls and training evaluations
  Determine if adjustments are needed to on-line help, learning guides or training presentations.

  Quick reference guides or other communications are written and distributed to clarify concepts and/or procedures

Positions
Banner User Services is comprised of two positions and report to the UCATS Manager of User Services.

  WIN User Support and Training Coordinator
  WIN User Support and Training Specialist

Functional Experts

Key functions
Functional experts are the subject matter experts for their module or application and oftentimes provide the following support to their area and/or campus departments.

- Documentation for their departmental operations

- One-on-one assistance via telephone or desk-side

- Develop materials and co-present training sessions with Banner User Services

It is important to remember that functional experts are “borrowed” resources. These duties are in addition to their normal job functions, and may have limited time to devote to training and support.
## Workshops

### Pre-implementation

Sungard Higher Education, WSU and other universities recommended specialized workshops for Banner functional experts or their designees and university managers in preparation for implementation. A series of pre-implementation workshops were created and delivered to the WSU campus community.

Session descriptions and other information are found in the document *WIN Training and Workshop Sessions Overview*, located on the Help for Faculty/Staff tab on [http://myWSU.wichita.edu](http://myWSU.wichita.edu) in the Training Opportunities channel.

- Implementation Strategies for Supervisors
- Train the Trainer
- Customer Care
- WIN Writers Track 1: Developing Custom Materials
- WIN Writers Track 2: Banner Template and Full Shot
- WIN Writers Track 3: Web Content Contributors

### Post-implementation

From time to time, workshops are offered to the WSU community. The following workshops are of most interest.

- **WIN Writers, Tracks 1 and 2**
  Departments continue to update Web pages and office procedure manuals. Track 1 lays the foundation for writing skills. Track 2 provides hands-on time using the learning guide template and screen capture software, Full Shot.

- **Customer Care**
  Many areas across campus give assistance to students, faculty and staff without realizing they are actually providing help desk support. This workshop is focused on quality customer support provided over the telephone or face-to-face.
Training

Focus

During Phase I, Sungard HE trained the Banner core module users. Banner User Services (BUS) and functional experts concentrated their efforts on campus department personnel, faculty and students.

In Phase II, training and support is focused on the following areas.

- Access for new employees or changes of current employee’s job duties requires training in order to gain access to the appropriate Banner forms. Previously training employees and infrequent Banner users are welcome to attend.

- Tips, Tricks and Traps are typically refresher sessions for previously trained campus department personnel. Sessions are focused on tips to help streamline usage and traps to avoid.

- Additional Banner options continue to be introduced to campus department personnel and require classroom training and documentation.

- New Banner releases may generate changes to documentation. Significant changes may also require classroom training.

- Banner channels and Self Service updates may generate changes to on-line help for faculty, staff and students.

- Students do not use Banner Channels and Self Service during regular business hours. The development and maintenance of quality, just-in-time help for students is a key part of the student support plan.

Training needs assessment

The needs assessment items listed below were used in Phase I and continue to be used to develop new training plans. For details, review Banner User Services Help Desk and Training Plan.

- Determine training topics in conjunction with functional experts.

- Identify potential number of trainees.

- Estimate length of session (90 minutes, half day, etc.).

- Determine dates and frequency of session offerings.

Pilot groups

Pilot groups continue to be built into the training schedule to help refine both training resources and presentations.

Continued on next page
Training, Continued

| **Banner training** | Training is required for Banner access. 
|                     | Banner training sessions are instructor led and include Banner functionality as well as WSU procedures. 
|                     | Sessions focused on Banner maintenance options are often co-presented by Banner User Services and functional experts. 
|                     | Banner inquiry and Self Service sessions are typically presented by Banner User Services. |
| **Banner channels** | Banner channels, Self Service and Reporting Services options are “point and click” and are often considered self explanatory. However, understanding the information presented and the underlying WSU procedures is not always intuitive. |
| **Self Service**    | Faculty and staff training is not required but is recommended for Self Service and Reporting Services. Open labs are available to faculty at the start of each term and during grade entry. |
| **Reporting Services** | Students use Banner channels and Self Service and rely upon strategically placed on-line help information rather than instructor led training sessions. |
| **myWSU**           | Banner User Services works with functional experts, University Computing and other areas at WSU to evaluate, develop and deliver additional training opportunities to the campus community. |
Employee Training

Workshops

- Banner User Services (BUS) will continue to offer customer service and other workshops as needed (see page 10). Additional topics will also be considered.

Navigation training

- Navigation training is required prior to gaining access to Banner forms. It is offered on an as-needed basis by Banner User Services for back office personnel (see Back office turnover training below). Navigation training is incorporated into Banner training sessions for campus departments.

Cross module training

- Cross Module Training needs are identified by the functional experts. The various FEs develop and conduct cross module training for specific departments on a limited number of Banner forms. For example, Financial Aid provides training to Admissions and Accounts Receivable for specific forms within the financial aid module.

Back office turnover training

- Back office is a term used to identify core Banner areas such as Financial Operations, Human Resources and the Registrar's Office. Back office functional experts train new employees in their area after they have completed Navigation training.

Campus department training

- Banner User Services (BUS) provides training for the campus community. Typically, training is developed and conducted with a functional expert and include Banner functionality and WSU procedures. For example, Purchase Requisition and Approvals training is developed and presented by BUS and the Purchasing office.

Student Training

- Student Banner channels and Self Service instructions are provided as PDFs, on-line help and myGuides rather than instructor led sessions.

- Banner User Services works closely with the functional experts and help desks to ensure the placement and delivery of clear, accurate on-line help.
Training Resources and On-Line Help

**Learning Guides**

Learning guides are detailed instructions used in instructor led training sessions.

The guides are created using the “Banner template” developed by Banner User Services to provide a standardized look and feel. Some departments also use the template to document their office procedures.

Banner learning guides are available as PDFs on the Help for Faculty/Staff tab on WSU’s portal, [http://mywsu.wichita.edu](http://mywsu.wichita.edu) and are distributed in training.

**myGuides**

On-line videos, referred to as myGuides, are developed by BUS primarily for student and faculty Self Service options.

myGuides are an excellent way to communicate “how to” topics to a large audience “just-in-time”. Add-ins such as sound and interactivity will be used to enhance the user experience and encourage viewing.

Student myGuides are posted on the Student Help tab on WSU’s portal, [http://mywsu.wichita.edu](http://mywsu.wichita.edu).

Employee myGuides are posted on the Help for Faculty/Staff tab on WSU’s portal, [http://mywsu.wichita.edu](http://mywsu.wichita.edu).

Continued on next page
When WSU on-line help is available for a particular Self Service option, a black and white question mark is displayed on the page as shown in the example below.

Clicking on the option will take the user to specific help information.

- Banner User Services is responsible for the development and maintenance of robust help information in Self Service and the portal, myWSU.

- Help desk calls are reviewed to help determine the topics and placement of information.

- Web page statistics are periodically reviewed to determine page usage in conjunction with events such as registration and grade entry.

The goal is to make it easy for the user to find the right answer quickly and without help desk assistance.

Continued on next page
How Do I... guides take a different approach to help information by focusing on an event or process rather than a specific Banner or Self Service option.

“How Do I...Help a Student Register?”, for example, is an interactive Web page that helps the employee work through registration problems with a student. In the example below, item #3, “Does the student have an Active SGASTDN record and term?” instructs the user to review a specific Banner form, provides short explanations to help the student and appropriate contact information.

![Diagram of Banner form information]

3. Does the student have an Active SGASTDN record and term?

<table>
<thead>
<tr>
<th>Student Status</th>
<th>Eligible for Registration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>New students - New Term matches term of admissions on SAAADMS</td>
</tr>
</tbody>
</table>

If a student is reactivated for the summer semester but does not enroll in summer classes, they must be reactivated again for the fall semester.

<table>
<thead>
<tr>
<th>Student Status</th>
<th>Not Eligible for Registration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inactive</td>
<td>Contact the Registrar’s Office to reactivate 316-978-3055</td>
</tr>
<tr>
<td>Inactive No Show</td>
<td>Contact the Admissions Office to reapply</td>
</tr>
</tbody>
</table>

If the student does not have a SGASTDN record, but they do have an Admissions Application on SAAADMS, then student must contact the appropriate admissions office before they are able to register:

- Undergraduate Admissions: 316-978-3085
- Graduate Admissions: 316-978-3095
- International Admissions: 316-978-3232
Training Registration

Training schedule and registration

**Training/Workshop Registration** is located on the Help for Faculty/Staff tab on [http://mywsu.wichita.edu](http://mywsu.wichita.edu). Employees use this option to view, register or drop training sessions.

- **Register** button – View session description, dates/times and/or register for training.
- **Session** button – View or drop individual registrations.

Evaluations

Evaluation forms are distributed at the end of instructor led training sessions and are used to help identify areas where training materials or delivery require improvement.

The results of the training evaluations are presented graphically and posted on the WIN Web site.

Security

Access

Banner User Services, functional experts and members of the Banner security team work together to ensure access to Banner is properly created and maintained.

Banner

Training is required to gain access to Banner forms.

Self Service

Training is strongly recommended but not required for access to Self Service. Training is designed to provide an understanding of the processes and procedures as they relate to Self Service and Reporting Services.
### University Help Desks

#### Banner Help Desk

The Banner Help Desk is the responsibility of Banner User Services. It provides support to WSU faculty and staff as it relates to Banner, Banner channels, Self Service, Reporting Services and myWSU. The Banner Help Desk can be reached during regular business hours at 316-978-5800 or bannerhelp@wichita.edu.

Calls are addressed in a timely manner and reviewed to determine if additional training or documentation is needed or if current materials require modification. Banner User Services works closely with department functional experts and members of WSU’s University Computing and Telecommunications Services (UCATS) department to communicate and resolve issues.

#### University Computing Help Desk

University Computing Help Desk provides password, hardware, software and student e-mail assistance to the campus community. They can be contacted at 316-978-HELP during regular business hours or e-mail helpdesk@wichita.edu.

In addition, students contact the University Computing Help Desk with myWSU, Banner channels and Self Service questions. They are encouraged to click on the Student Help tab located on the portal, http://myWSU.wichita.edu, where the most frequently asked questions are addressed. If a call requires additional assistance, it is transferred to the Banner Help Desk.

#### Blackboard Help Desk

Blackboard training and support is provided by the Media Resource Center (MRC) at 316-978-7777 or blackboardhelp@wichita.edu.

FAQ’s and training information are located on the Help for Faculty/Staff tab on http://myWSU.wichita.edu.

#### Technical Help Desks

Technical help desks across campus provide hardware and software support to faculty, staff and students, typically within their college or department.

### Banner Help Desk Call Tracking

#### Software

UCATS help desks will log help desk calls on-line. Projected start date is Fiscal Year 2008.
# Help Desk Contact Information

<table>
<thead>
<tr>
<th>Type of Question</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Passwords (e-mail, hardware, software)</td>
<td>Richard Ryan (316-978-HELP) <a href="mailto:HelpDesk@wichita.edu">HelpDesk@wichita.edu</a></td>
</tr>
<tr>
<td><strong>Students:</strong> myWSU and Self Service</td>
<td>University Computing Help Desk Ken Pavlichek Jessica Wolf Brenda Johnson Marguerite Schmidt</td>
</tr>
</tbody>
</table>

## Banner Training & Support

<table>
<thead>
<tr>
<th>Faculty</th>
<th>Banner myWSU Self Service Reporting Services</th>
<th>Banner User Services 316-978-5800 <a href="mailto:BannerHelp@wichita.edu">BannerHelp@wichita.edu</a> Becky North Jennifer Snyder</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>and</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff</td>
<td>Banner training schedule and registration</td>
<td><a href="http://mywsu.wichita.edu">http://mywsu.wichita.edu</a>, Help for Faculty/Staff tab, Training Opportunities</td>
</tr>
</tbody>
</table>

In Self Service, look for this icon to view on-line help.

## Banner Functional Experts Contact Information

**Banner User Services (978-5800)** assists users with Banner, Self Service and Reporting Services information covered in training.

**Functional Experts** are listed in the Contact Information section of all Banner learning guides.