

University Human Resources

Online Training Resources





Vicki Larabell, Manager Training and Professional Development

<u>File Edit View History Bookmarks Yahoo! Tools Help</u>

www.oakland.edu/uhr/training/

Training Homepage

Oakland University...

Faculty and Staff Training

Faculty and Staff Training Home Current Training - Enroll Now! Web Development - CareWorks CMS **Employment Services Training** Benefits and Retirement Training Miscellaneous Trainings Professional Development Library SkillSoft Online Training Banner Resources on Port Adm Shared Data Training on PortAdm Request for Banner Training Training History Evaluate Our Training Contact Faculty and Staff Training **Building a Better U**

UHR Home



eBill | Webmail | MySAIL | 📥

Search OU

Our mission is to provide the tools and resources needed for Oakland University employees to effectively and efficiently perform their jobs.

Our area is responsible for training on:

- New technologies
- Web development
- Desktop applications
- Banner
- Employment issues
- Management skills

These responsibilities are met through classroom/laboratory trainings, one-on-one trainings, online courseware, and presentations from outside experts. We also have a library of professional development books, videos, and courses for faculty and staff use.

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Building a Better U UHR Home OU Home > Faculty and Staff Training > Current Training - Enroll Now!

Current Training - Enroll Now!

Current Course Offerings

Courses currently being offered are shown below. Please note that this is **not** an exhaustive list of all cours that are available throughout the year but rather just a list of what is scheduled at present. If you want to take course that is not currently scheduled, please check back at the beginning of each month, when the new tra offerings for that month are released.

Curriculum	Courses Currently Scheduled
AP ASSEMBLY	Overview of Online Resources for Managers
Banner	Banner Digital Library Banner for New Users OURA Advanced Banner for Grant Financial Management OURA Banner for Grant Financial Management
Business Systems MS PowerPoint Excel & Word MS Access and morel	1-on-1 Computer Training
EMERGENCY PREPAREDNESS	Preventing Workplace Violence at Oakland University
Employee Health & Safety	Environmental Health & Safety
Faculty Workshops	Center for Excellence in Teaching and Learning (CETL) Training
Grant, Contract & Research Administration	Grant Writer's Seminar OURA Advanced Banner for Grant Financial Management OURA Banner for Grant Financial Management OURA Budget Preparation for Sponsored Programs OURA Electronic Proposal Routing Application

OURA Funding Searches Using PIVOT - First Friday of every month

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University Communications and Marketing

Submit a Question/Comment Who is my Account Manager? Staff Directory

Services

Logos, Marks and Fonts

Mail Guidelines

Publications

OU Style Guidelines

OU Fast Facts

Required CMS Training

Communications and Marketing Anibal House 2200 N. Squirrel Road Rochester, MI 48309-4401 (map) (248) 370-3184 fax: (248) 370-3182



Required CMS Training

The five video segments covering the basic use of the Content Management System (CMS) are located in the tabs below. After viewing all five segments, answer the questions that are listed in the tab titled "CMS Training Assessment." Once the questions are answered, make sure to click submit. Access to the requested CMS pages will be available within three business days. Advanced CMS use training videos will be available soon.

Questions regarding CMS training should be directed to your UCM account manager.

LOGGING ADDING/LOCATING CREATING ADDING RICH TEXT CMS TRAINING SUPPLEMENTAL TRAINING TRAINING TRAINING

Rich Text Editor

This video covers all areas of the Rich Text Editor. Each tool available for use will be listed and explained. Several tools that are more extensive, such as the format strippers and the hyperlink manager will be explained in more detail. This video is essential for understanding how to properly add content to a page.



∠ url

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OU Home > Faculty and Staff Training > Employment Services Training

Employment Services Training

SkillCheck Assessment Overview

Learn how UHR Employment Services' SkillCheck Assessment software can help you set goals for success in your career! This presentation discusses what to expect, what the assessment measures, and how you can use your results as a tool for your own professional development.



Support Documents

SkillCheck/SkillSoft Comparison Chart (For Microsoft Office 2007) Keyboard Shortcuts

Employment @Oakland University - Changes in I-9 Guidelines

The following slides provide a guide for processing the Form I-9.



Employment @ Oakland University - Staying in Compliance with New Regulations

The campus-wide training in February 2010 about new regulations regarding future hires was widely attended. If you missed the live session, you can still access the materials by clicking the image below for a PDF version.



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OU Home > Faculty and Staff Training > Benefits and Retirement Training

Benefits and Retirement Training

Outcomes Based HMOs Presentation, October 2012

Sessions with Benefits staff and HMO representatives were held to address questions and concerns related to the new Outcomes Based HMO plans coming in 2013. The materials from the sessions are available here (PDF):



For Retirees

If you are a retiree, who would like to make payments for your retiree benefits online, you can visit UHR Marketplace.

For detailed instructions on how to make payments, please click here.

HMO Presentations, April 2012

Representatives from HAP, Blue Care Network and Priority Health HMOs made presentations about the staff "Outcomes Based" HMO plans that are coming in 2013. Some highlights:

- Current HMO plans are "participation based". If you don't meet the goals set by the plan you may still qualify for the higher level benefit by participating in programs to improve health.
- Outcomes based plans require you to meet the targets set by the plans to reach the higher level of benefits. Each plan offers help in reaching the targets.

The materials from each of the HMO presenters are available here:



To view a comparison chart of the three HMOs, please click here.

For a video of the full presentation, see below.

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Social Media in the Workplace | 2012 Contract Update for Managers | Workers Compensation Claims Process

Social Media in the Workplace

In July 2012, an attorney and a social media specialist did a presentation related to the pros and cons of using Social Media, such as Facebook, Twitter, and Linkedin, in the work environment.



2012 Contract Update for Managers

The University Human Resources, Environmental Health and Safety, and Risk Management departments presented an overview to managers on the recently ratified Clerical Technical and Service and Maintenance Contracts. These materials will help managers understand updates to the current contracts.



Workers Compensation Claims Process
Check out this interactive workflow created by the Department of Risk Management. It will open with Microsoft PowerPoint.

Creat out this interactive worknow created by the Department of Risk Management, it will open with Microsoft Power-Point



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OU Home > Faculty and Staff Training > Professional Development Library

Professional Development Library

The UHR Technical Training and Professional Development Department has a great collection of materials for professional development. If you would like to check out or review these items, please contact us.

Subjects include:

Accountability and Personal Responsibility
Communication
Conflict Resolution
Customer Service
Ethics and Compliance
Goal Setting
Growth and Change
Management and Leadership
Morale and Motivation
Personal Growth and Development
Recruiting, Retention and Interviewing
Teamwork and Productivity
Training Tips and Games

Item	Category	Description
Accountability That Works!	Accountability and Personal Responsibility	What would your organization be like if no one ever asked, "Whose fault is this?"; What if we could all let go of the 'blame game' and view accountability as a method for achieving increased personal and team effectiveness? Full Course (Box containing video and DVD (approx 22 min), leader's guide, 10 pins, 10 Accountability Cards, PowerPoint CD; packet of 10 participant workbooks)
Value of Time	Accountability and Personal Responsibility	In today's ever-changing and hectic workplace, peopleare constantly wishing that they had "more time" to get things done, Yet, they don't stop to think about the inherent value of each and every moment they already have. (Perhaps if they did, they wouldn't waste so many of them.) This brief and persuasive meeting opener or closer purely and simply characterized just thatthe inherent value of each increment of time. Time is valuableuse it wisely. DVD (2:30) & discussion guide.

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OU Home > Faculty and Staff Training > Skill Soft Online Training

SkillSoft Online Training

Building and sustaining a high-performance culture within Oakland University requires an investment in the personal and professional development of its workforce. University Human Resources is committed to providing quality personal and professional development opportunities to support faculty, staff and administrators in their pursuit of career growth and professional excellence. Everyone is encouraged to take advantage of the numerous and varied learning opportunities that are available, including online learning.

SkillSoft provides a vehicle to build skills and knowledge, and enhance strengths gained from experience or education. Faculty, staff and administrators have access to a library of approximately 1500 courses, which can be taken via the Internet from any computer, at any location with Internet access, any time of day or night. There are three primary curricula for selection:

- Business Skills Curriculum include topics such as management and leadership, written and verbal communication skills for personal and professional effectiveness, and customer service skills;
- Desktop Curriculum offers courses on Microsoft Office applications, internet browsers, and Adobe programs;
- IT professionals can select from Oracle database courses and project management skills. SkillSoft courses are easy to
 navigate and the learner is actively engaged through audio, case studies, animation and the ability to print handouts for
 reference. Pre- and post-tests provide an opportunity to demonstrate proficiency.

A bookmarking feature allows learners to move in and out of courses based on the learner's schedule and needs. One section of material can be completed in as little as 15 minutes. Learners can refresh or update themselves on various sub-topics within a course or select entire courses to enhance proficiency. To make the best use of time, learners may "test out" of topics within a course in which they can demonstrate proficiency by taking a pre-test. The course content automatically adjusts to cover only the information the learner needs.

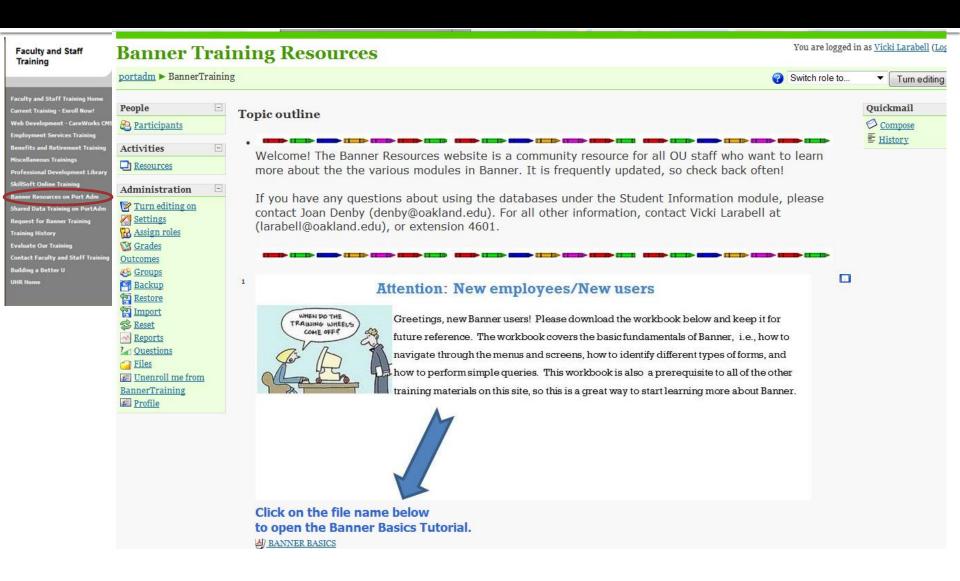
Learners can print certificates of completion on courses in which they have earned an 80 or higher.

All Oakland University faculty and staff are eligible for this training tool.

New users: Click here to request your account on SkillSoft.

Returning users: Click here to sign into SkillSoft.

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Access Queries for the Student Module Created by Joan Denby

Documentation for using Access Databases

- Banner and MS Access for Beginners
- Append Query
- Banner Student Job Aid

Access 2007 Helpful Hints

Creating a Report in MS Access 2007

- Creating a Macro and Other Things
- Crosstab-Unduplicated-Unmatched Documentation

Choosing a View to Use with MS Access and Banner

Building a Switchboard

Using Expressions as Criteria

Postcard Names Not Enrolled Documentation

ODBC Troubleshooting Errors

☑/ Fields in Student Views

NRS Sample Database Handout

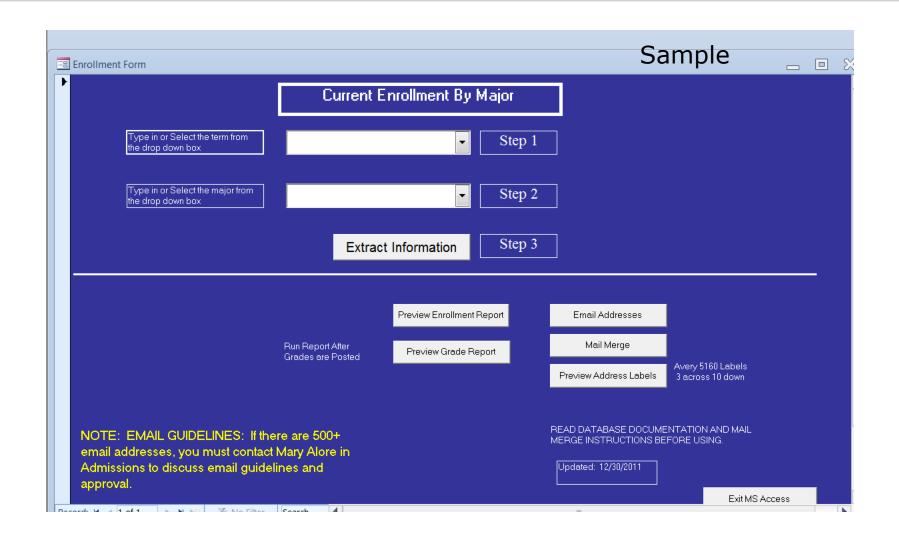
Understanding a Relational Database and Other Things

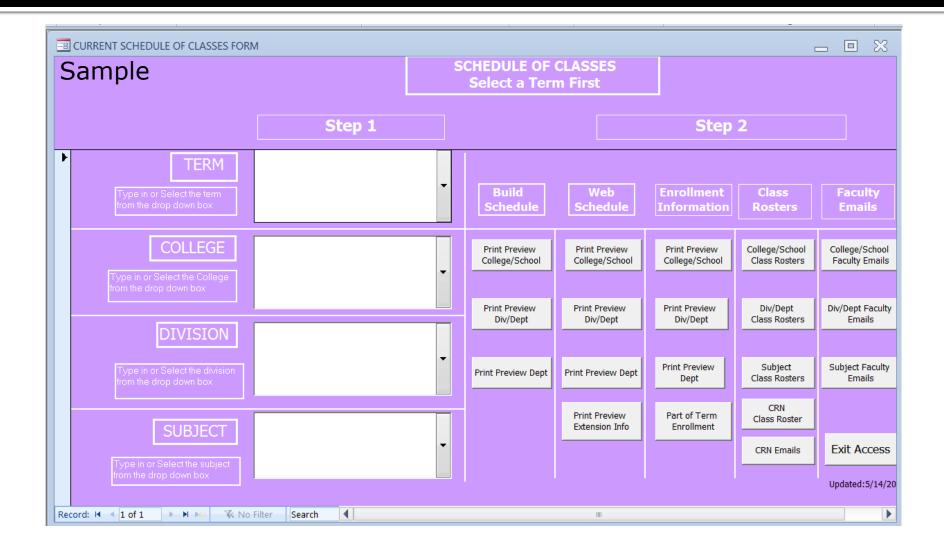
- Current Enrollment Documentation
- Grad Admissions Documentation

Undergraduate Graduation Database Instructions

Joann's Access Databases - Please download to your desktop before using!

- Action Queries
- 9 90 Credits No Graduation Application (change criteria)
- A & S Major Audit Database
- Active Sections 4 Database (Updated 9/21/2010)
- Anton Frankel Center2 Database (updated with new Registration Code)
- Athletics8 Database (9-10-2012)
- (changed Major Database (changed original major)
- Chartwells Main Campus (Bldg/Part of Term/Day/Time/Enrollment Info)
- Classroom Monitor By Part of Term/Day/Faculty
- COM-JRN Database
- Crosstab-Unduplicated-Unmatched Database
- @ Current Enrollment by Major4.mdb (updated 12/30/2011)
- Enrollment Summary By Major2 (updated 12/30/2011)
- Enrollment Summer by Major Music2 (Updated 2/24/2012)
- (Grades Database
- Graduate Admissions MS Access 2007
- Graduate Admissions MS Access 2003
- Graduated Students Awarded Degrees
- Graduated Students Awarded Degrees (.mdb format)
- Macomb Extension Enrollment2 (Updated 2/24/2012)
- Minors and Concentrations Database
- NRS Sample Database
- OpenClass Database
- Open Gen Ed Database (Revised 12-14-2010)
- Override Database By Term and Adviser
- Postcard Names-Not Enrolled Database
- Repeat Course Database
- Repeat Course Database 2003 Format
- Retention Database (updated with new views)
- Schedule Information 32 Database
- Seaholm Extension Enrollment2 (Updted 2/24/2012)





The Banner Finance Module



The Banner Finance Module contains a variety of processes that help purchase and pay for goods and services, and also manage budgets, projects, endowed funds and sponsored programs. Feel free to download any of the training workbooks listed below.

Running the OULedgers Database

Click on the file below to open the instructions

Running the OUledgers database

Departmental Time Entry for Students - handout

Instructions - Department Time Entry - Students

Commonly used Finance Forms

Commonly Used Banner Finance Forms

Managing Accounts Payable

Managing Accounts Payable - User workbook

Managing Accounts Payable - Forms and Tables

Managing Accounts Receivable

Managing Accounts Receivable - User workbook

Managing Accounts Receivable - Forms and Tables

Managing the Budget Development Cycle

Managing the Budget Development Cycle - User Workbook

Reconciling and Managing General Ledger Accounts

Reconciling and Managing General Ledger Accounts - User Workbook

Reconciling and Managing General Ledger Accounts - Forms and Tables

Managing the Budget Development Cycle - Forms and Tables

Banner Finance user group files

Excel to Access Exercise

Building Complex Queries in Access Using Banner Finance Tables

The Banner Advancement Module



Banner Advancement

Attention Advancement module users. We have recently added the Advancement module to our Banner Digital Library. Please email Vicki Larabell (larabell@oakland.edu) if you are interested in looking at the new online tutorials.

- Banner Advancement Condensed Training
- Banner Advancement Overview Ppt
- Banner Event Planning Manual

Banner Advanced Technical Information

Using the Banner Data Dictionary

Data Dictionary

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Data Entry Standards for Banner Users

Welcome to the training for Data Entry Standards for Banner Users.

Please open and review the training module located below entitled: **Data Entry Standards for Banner Users**.

The training will take between 30 and 60 minutes to complete.

After you feel comfortable with the information in the training, please click on **Shared Data Exam** and answer the fifteen questions. Be sure to click **Submit All and Finish** when you have answered all questions.



- 1 Data Entry Standards for Banner Users
 - Data Custodianship Table
 - Shared Data Exam

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Banner Training Request

In order to provide you with the specific Banner training that you need, you will need to complete the following needs assessment. The more detail that you can provide, the better we will be able to help you.

assessment. The more detail that you can provide, the better we will be able to help you.			
If you are a new employee, you may need to inquire of your coworkers and/or supervisor to find out what your exact job responsibilities are in regards to Banner access. Please make any necessary inquiries prior to requesting training.			
Name •			
Email ,			
Telephone •			
• Job Title			
• Department			
1. Have you received your Banner username and password from UTS? (You would've retrieved this in person from 220 DHE) Yes No			
If your answer was "no," you should talk to your supervisor or office staff about obtaining access to the proper modules prior to requesting training.			
2. Please check the Banner module(s) that you will be using.			
Student			
Advancement			
Human Resources			
Other			

Other Useful Resources

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Training History - User

PLEASE LOGIN Type in your NETID (OU e-mail) name and password below and then click SUBMIT. When typing in your NETID name, do not include the "@oakland.edu" part.					
NETID UserName					
NETID Password					
	Submit				

PERSONAL INFORMATION

Shown below is your personal information. Note that this information is drawn out of Banner. If this information is not correct, please contact Vicki Larabell. Once the values are corrected in Banner, you should see them updated here immediately.

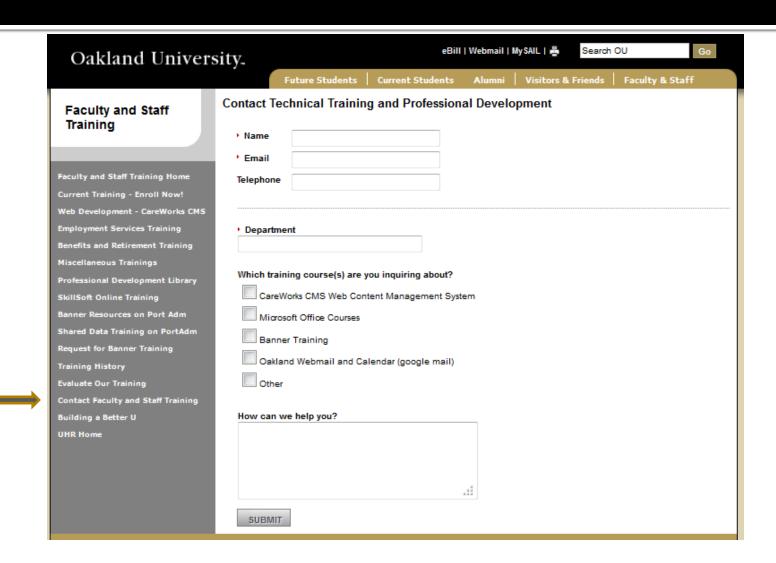
Name	Vicki Larabell
E-mail	larabell@oakland.edu
Department	University Human Resources Dept (2637)
Division	Finance & Administration
ECLS Code	WD-Admin Professional FT (PF)

COURSES YOU'VE ENROLLED IN

Shown below are the courses that you've been marked as having attended since the training history start date of January 10, 2011.

Total number of records shown: 1				
Course Name	Dates/Times	Instructor		
Management Best Practices	5/22/2012 1:05 - 4:30 p.m.	Jacqui Shulte		

Other Useful Resources



Other Useful Resources

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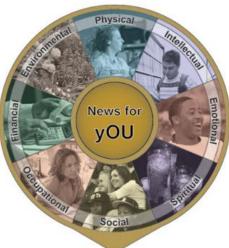


Are you taking advantage of FREE ACCESS to the Rec Center?



Read More >>





To get the latest on personal health information resources and events, click on the area of the wheel that you'd like to focus on.

Wellness is multidimensional. It includes many components, all of which work together in an individual's process of improving quality of life and developing a sense of well-being. The model that Oakland University promotes includes: physical, intellectual, spiritual, emotional, environmental, social, occupational, and financial wellness.

Latest news updates for Building a Better yOU



OU employees invited to slim down in Weight Watchers program

Training Services - Welcome Banner Student Banner Financial Aid Banner Finance Banner Human Resources Travel and Expense **Banner Fundamentals** This course will introduce you to the Banner suite of products as well as teach you how to navigate in and personalize Banner. The Banner forms naming convention will also be explained. It is recommended that you take this course before taking other Banner product courses. • What's New in Banner 9 9.0 • Navigating in Banner 8.0 | 9.0 • Personalizing Banner 8.0 **Location Management** In this course you will define buildings and rooms and update attributes of each for purposes of housing assignments and class scheduling. • Location Management Overview 8.1 - 8.5 • Managing Residence Halls Managing Classrooms Recruitment In this course you will learn how to enter and maintain information about prospective students. This information entails details about the prospects education history, the demographic and biographic details about the prospects, and how the person became a prospect of the institution.

• Recruitment Overview 8.1 - 8.5

• Managing Prospect Information Managing Regionalization

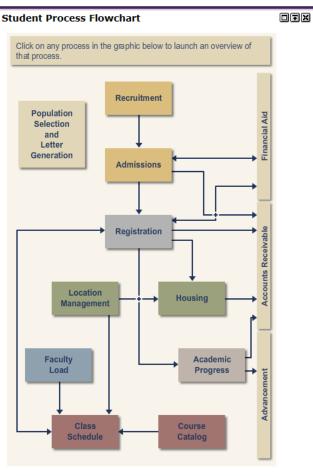
• Running Recruitment Reports

• Managing Appointments with Prospects

Processing Prospect Information Provided

Entering Prospects

Electronically



Course Catalog In this course you will learn how to manage your institution's course catalog in Banner. You will learn how to create and update a course, including course details such as course title, department, credit and contact hours, syllabus information, registration restrictions, schedule restrictions, and other course requirements. You will learn how to prepare a printed Course Bulletin Report, and how to share catalog data with other institutions. • Course Catalog Overview 8.1 | 8.2 - 8.3 | 8.4 | 8.5 | 9.0 • Creating a Course 8.0 | 9.0 • Entering Courses in the Course Catalog 8.0 | • Adding Course Details 8.0 | 9.0 Entering Restrictions 8.0 | 9.0 • Creating the Printed Catalog 8.0 | 9.0 Managing Catalog Data Transfer 8.0 Class Schedule In this course you will establish and maintain a course schedule, create schedule and registration restrictions, and produce schedule reports. • Class Schedule Overview 8.1 - 8.5 | 9.0 • Scheduling a Section of a Course 8.0 | 9.0 • Defining Multiple Sections 8.0 | 9.0 Managing Multiple Sections 8.0 | 9.0 Running Class Schedule Reports 8.0 | 9.0 Faculty Load

In this course, you will learn to create a faculty

record, assign, and maintain faculty and advisors. dynamically calculate the individual workloads and

January 10, 2013

Banner Finance

Banner Human Resources

Travel and Expense

January 10, 2013

Banner Fundamentals

This course will introduce you to the Banner suite of products as well as teach you how to navigate in and personalize Banner. The Banner forms naming convention will also be explained. It is recommended that you take this course before taking other Banner product courses.

- What's New in Banner 9 9.0
- Navigating in Banner 8.0 | 9.0
- Personalizing Banner 8.0

Purchasing Goods and Services



In this course, you will learn how to purchase goods and services following the process from requisitions, bid processing, and purchase orders through receiving.

- Purchasing Goods and Services Overview
- Purchasing and Procurement Foundations
 Processing Requisitions
 Managing Approvals
 Managing the Bid Process
 Creating Purchase Orders

- Working with Purchase Orders
 Managing Blanket Purchase Orders
 Managing Change Orders
 Receiving Goods

Managing Accounts Payable



In this course, you will learn how to manage accounts payable following the process from invoices and credit memos to processing payments. You will learn how to perform accounts payable queries, run 1099 reports, and manage purchase cards.

Managing Accounts Payable Overview 8.3

Reconciling and Balancing General Ledger Accounts



In this course, you will learn how to work with general accounting transactions, including encumbrances and journal vouchers. In addition, you will learn how to use gueries to review budget information, trial balances, transactions, encumbrances and documents created in the general ledger processes. You will also learn how to use Governmental Accounting Standards Board (GASB) Reporting within Banner Finance.

- Reconciling and Balancing General Ledger Accounts Overview 8.3 - 8.5
- Working with Encumbrances
- Working with Journal Vouchers and Cash
- Using the Internal Vendor Processing **FUPLOAD**
- Running General Ledger Queries
- Running General Ledger Reports
- Managing GASB Reporting
- Managing Fiscal Year End Processes

Managing Budgets



In this course, you will learn how to manage budgets following the process from budget development to budget monitoring and maintenance.

- Managing Budgets Overview 8.3 8.5
- Managing the Budget Development Cycle
- Managing Budgets in Banner Self-Service
- Working with Labor Budgets

Managing Cost Accounting



In this course, you will learn how to track and bill all costs associated with projects, whether performed for internal departments or external customers. You will learn how to assign billing rates, create customers and projects, record project charges, bill

Creating and Managing an Employee Record



Training Services

In this course you will learn how to manage employee records by capturing personal, employee, and compensation information.

- Creating and Managing an Employee Record Overview 8.2 - 8.7
- Creating a New Person Record
- Managing Applicant/Employee Information
- Creating Employee Record
- Managing an Employee Record
- Managing Benefits and Deductions
- Managing Beneficiary, Cobra and FMLA Coverage
- Running Benefit and Deduction Reports
- Managing
 Retirement Benefits
 with Combined
 Limit

Training on Banner Human Resources for version 8.2 and on is provided. To launch a lesson, select the version number next to the lesson title based on the version your institution is using.

Note: Some lessons will offer a range of applicable versions. For example, the link 8.2-8.5 will offer appropriate training for Banner Human Resources 8.2 through 8.5.

- Introduction to Creating a New Person Record 8.2 8.3 | 8.4 8.7
- Generating a Person Record 8.2 8.7
- Establishing a New Employee 8.2 8.3 | 8.4 8.7

Generating a Person Record TRAINING SERVICES

Adding a new person into the Banner Human Resources system requires that a person record be created first. You will use the Identification Form (PPAIDEN) to establish a unique ID number for a person and capture biographic and demographic information.

In this lesson, you will learn how to create a person record and enter detailed personal information using PPAIDEN. The lesson *Using the NewHire Form* reviews a shortened process for entering new employees into Banner.

identification PPAIDEN 8.0			
Current Identification			
Last Name: First Name: Middle Name: Prefix: Suffix: Preferred First Note you may use PPAIDEN to perform initial data entry of a non-person (such as a vendor or business) into Banner Human Resources as well.	Last Update User: Activity Date: Origin:		
Non-Person User: Create Date:			

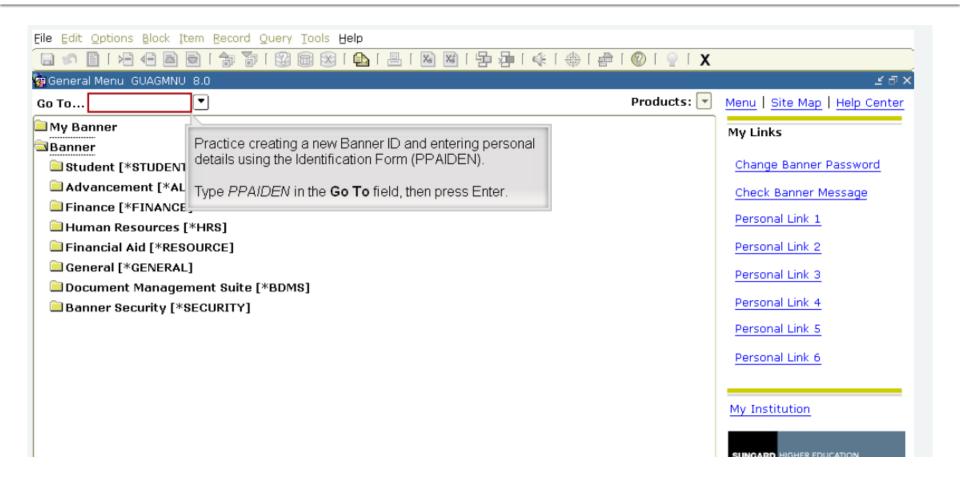


In this hands-on exercise, you will practice creating a record for an applicant, Jocelyn E. Long, in Banner Human Resources. You will generate a unique ID for her as well as enter biographic information.

Try It Yourself







How to utilize the Banner tutorials for your department.

Set up a quiet room with a computer where people can schedule a time to sit down and review a module.

Schedule a conference room with an internet connection so a training session can be offered to many people at once.

Make screen captures of the various processes and make your own training handouts.

To schedule an appointment to review or use the Banner Digital Library, please call Dana Pierce on 4579 or send email to dpierce@oakland.edu

Questions?

Thank you for your time!