Upcoming Banner Finance Training

Due to the Covid-19 pandemic and most employees are teleworking, Banner Finance Training can be scheduled with Penney Doughtie. The live training sessions will use TEAMS with audio, video, and shared screens. Send training request emails to doughtiep@ecu.edu.

**ECU Banner Finance Training for New Users**
The online training course will introduce new users to Banner Finance. The thirty minute video covers financial topics such as the chart of accounts (called FOAPAL), fund types, and rule class codes. This video also demonstrates basic navigation in Banner Self Service as well as Banner 9 Admin Pages. This training is required prior to a user requesting Banner Finance Security.

**Chrome River Training**
Chrome River is an accounting software application designed to automate and streamline Accounts Payable processes for travel expenses and corporate credit card transactions. This software product is customized to incorporate University travel rules and automated approval routing. Chrome River will replace the Online Travel system and the ProCard reconciliation process in WORKS. The Chrome River face-to-face training sessions will demonstrate navigation in Chrome River. Step by step instructions will be provided for the ProCard process, Blanket Travel, Pre-Approval Travel, Travel and Non-Travel Reimbursements for employees and students.

Dates TBA, go to [Cornerstone](#)

**Banner Finance 101/102 FOAPAL and SSB Training**
This two hour course is designed for Banner Finance users and provides detailed information about the chart of accounts (FOAPAL). Participants will navigate within the Banner Self Service System and learn to view budget information, transaction details and budget transfers.

Dates TBA, go to [Cornerstone](#)

**Banner 9 Finance 103 Admin Pages**
This two hour training session will introduce the Banner Finance users to Banner 9 Admin Pages. The participants will navigate within Banner 9 to view the budget information, document, FOPAL charts, and other relevant financial data in Banner 9.

Dates TBA, go to [Cornerstone](#)

**Introduction to Financial Services Processes**
This two-hour training session is designed to introduce new employees to Financial Services processes including: Banner Finance Security, Finance Application log ins, budget information, cash receipts, journal entries, purchasing methods, payment lookup, and much more.

Dates TBA, go to [Cornerstone](#)

**e~Print Report Training**
This course provides a demonstration on how to view Banner e~Print reports. The hands on training will allow the users to view the departmental budgets, users can

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bring FOAPAL information and get your questions answered. The attendees will view budget reports, transaction reports, and many more helpful ePrint reports. Also provided, is an ecuBIC demonstration.
Dates TBA, go to Cornerstone

**ODS and Quick Query Training**
This training will provide Banner Finance users with instructions on how to run Quick Queries and create custom queries. ODS - Operational Data Store is powerful tool for Banner Finance users and provides finance data history.
Dates TBA, go to Cornerstone

**Financial Monthly Departmental Review Training**
This training session will demonstrate each step of the University's Monthly Departmental Review of Financial Transactions Guidelines. Detailed instructions will be provided to retrieve the financial reports and transaction examples will be reviewed including: cash receipts, expenses, encumbrances, and payroll. Departmental documentation requirements and a completion log will also be reviewed. The Monthly Departmental Guidelines have been developed to meet the UNC GA Business Process Standards.
Dates TBA, go to Cornerstone

- Register for training classes on Cornerstone located on Pirate Port.
- All training is held in Materials Management Training Room 108, except the ECU Banner Finance Training for New Users which is a video.
- If you have questions, please contact Penney Doughtie doughtiep@ecu.edu.

10-06-20 10 am  Banner Finance 101/102 FOAPAL and SSB Training
10-07-20 10 am  Banner 9 Finance 103 Admin Pages Training
10-08-20 10 am  ODS and Quick Query Training
10-09-20 10 am  Introduction to Financial Services Processes
10-12-20 10 am  e~Print Report  Training
10-13-20 10 am  Financial Monthly Departmental Review Training
Chrome River training information is available on the [Chrome River Website](#).