Upcoming Banner Finance Training

Due to the Covid-19 pandemic and most employees are teleworking, Banner Finance Training sessions will use TEAMS with audio, video, and shared screens.

**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 Admin Pages. This training is required prior to a user requesting Banner Finance Security.

**Automated Journal Entries Training – Finance Self Service**
This two-hour course is designed for Banner Finance users that will enter journal entries. This training will demonstrate how to create and approve journal entries in Finance Self Service. Required training and security will be covered. Training Date TBA.

**Automated Journal Entries Training – Banner Admin Pages**
This two-hour course is designed for Banner Finance users that will enter journal entries. This training will demonstrate how to create and approve journal entries in Banner Admin Pages. Required training and security will be covered. Training Date TBA.

**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.

Training Dates and Information can be found on the [Chrome River Website](https://financialservices.ecu.edu/systems-coordination/).

**Banner Finance 101/102 FOAPAL and Finance Self Service 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. Training Date TBA.
Banner Finance 103 Banner Admin Pages
This two-hour training session will introduce the Banner Finance users to Banner Admin Pages. The participants will navigate within Banner to view the budget information, document, FOPAL charts, and other relevant financial data in Banner.
Training Date TBA.

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.
Training Date TBA.

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 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.
Training Date TBA.

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.
Training Date TBA.

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.
Training Dates TBA.

• Register for training classes on Cornerstone located on Pirate Port.
• Training sessions are presented on TEAMS.
• If you have questions, please contact Penney Doughtie doughtiep@ecu.edu.