GSU Banner Implementation Project
TRAINING PLAN for TRANSFER ARTICULATION

I. Mutual understandings/definitions
End User Training: training provided for students, faculty and staff, generally not found in functional offices, who need to access Banner or one of the Banner Web products for inquiry purposes, job submission processes, or limited data entry.

Functional Office Training: training provided for staff generally in functional offices, who need access to Banner or Banner Web products for transaction processing (data entry), inquiry purposes or reporting purposes.

Functional office responsibilities for Banner training:
1. Training of functional office staff, including cross training required for other functional offices
2. Where possible, training of faculty/staff outside of functional office (likely when numbers are not voluminous or the training is an intra-office collaborative effort)
3. Draft documentation of job aids, validation tables, and workflow among Banner forms.
4. Training on data interpretation (needed in conjunction with report training)

GSU In-house Trainer responsibilities for Banner training:
1. Basic navigation training
2. Job Submission training, in conjunction with functional offices
3. Letter Generation, in conjunction with functional offices
4. Population Selection, in conjunction with functional offices
5. Documentation, in conjunction with functional offices (Banner job aids, standard formatting of training materials)

II. Transfer Articulation – definition of training responsibilities

A. Transfer Articulation is done by staff in the Office of Admissions, Student Advisement Center, and the Offices of Academic Assistance/graduate admissions offices in the colleges. For undergraduate students, credit is entered by Admissions, articulated by SAC, and applied to a student’s program and/or re-equated if necessary by OAAs. For graduate students, credit is entered and equated (but not maintained in an articulation table) by OAAs/graduate admissions offices. Approximately 100 people will need to be trained on one or more elements of transfer articulation. Training will most likely occur for admissions staff when they are trained on primary admissions processes/forms. Training will most likely occur for advisement staff when they are trained on primary advisement processes/forms.
III. Transfer Articulation trainers

A. The TA training team will use 405 CS to train.
B. The trainers will attend a TRAIN THE TRAINER session. This was lead by Winnie Tsang Kosma.
C. Trainers:
   1. Members of the Transfer Articulation Focus Team: Tim Woltering, Dan Niccum, Linda Herndon, Julia Grubbs
   2. Members of the Degree Audit System Focus Team: Tim Woltering, Cathey Eves, Karl Adams, Jan Hudgins, Becky Cain, Linda King, Sue Fagan, Agnes Cook

IV. Training Development Strategies

A. Training will be developed around functional duties within TA, specifically: data entering of information on SHATRNS required before actual credit is entered on SHATAEQ, data entering of transfer credit for undergrad students on SHATAEQ and grad students on SHATRNS, maintenance of articulation table (TATR/TATC), procedures for articulation/rearticulating, rolling/unrolling to history, ordering of worksheets, equating for individual students on SHATRNS.

B. Training events and strategies
   1. Training will occur approximately late January, February, early March after all staff involved after completed a navigation training session.
   2. Staff members will be expected to practice in their individual offices outside the scheduled Banner times.
   3. Staff members will also be given assignments to complete during the individual practice times. Follow-up to assignments will occur prior to the next session. This will allow time for questions and review.

C. Testing Curriculum
   Feedback given during each training session will be used as update the training sessions. Ideas and documents provided to the trainers during the bi-weekly Training Committee meetings will also be utilized.

V. Schedule and location for training

A. Staff will be trained in 405 CS over an approximately 3-4 day period during the months of late January, February or March. Additional training will be arranged as review or follow up as necessary.
VI. Training materials/documentation/reference materials
   A. Documentation Requirements
      • In general, documentation need to be in the form of a functional task manual and assorted job aids.
      • Job aids need to include keyboard templates and quick reference cards.
      • A finalized “Data Entry Standards” documents will be required.

   B. Development of Materials
      • The Focus Team members for each team will be utilized in creating task specific documentation for the manual.

   C. Evaluation/Revision of Materials
      • Feedback will be gathered from “production users” in the office and revise accordingly.
      • Need to assign responsibility for the continuing upkeep of the functional task manual.

VII. Management and other issues
   A. Communication of training strategies/schedules
      Trainers will communicate training related issues/updates via e-mail.
   B. Managing training events
      Access to Banner is not given until the employee participates in a navigation training session.
   C. The trainers and the other personnel within each office who have attended system education will be responsible for ongoing support.
   D. Development of training plans for newly hired employees, as well as training for upgrades and revisions to software, has not been developed at this time.