Morehouse School of Medicine
Banner Finance Training

The Finance Division is pleased to announce its first Banner Conference at Morehouse School of Medicine. The conference will be held for four days on March 10 thru March 13th on the main campus at 720 Westview Drive. The conference is open to all MSM employees at all locations. Our goal is to hold the conference training annually to educate Morehouse School of Medicine's community on the technology used by the Division of Finance to process the School's financial transactions. We will also offer training on a smaller scale quarterly starting in October 2015. Please watch for upcoming announcements.

The training this year is geared to educate new users as well as provide a refresher to existing users on navigating effectively through what might be called a finance matrix. The conference consists of five tracks that will provide you the knowledge to navigate throughout Banner Finance:

Track #1: Understanding Accounting Transaction Detail

Track #2: Understanding Kronos Time Entry Management and Supervisory Approval

Track #3: Understanding Grant Account Management

Track #4: Understanding the Requirements for Purchasing Goods and Services

Track #5: Understanding Budget Queries and Budget Transfers

Registration will start on February 9, 2015. You may register using Cornerstone at https://msm.csod.com. Please register early as there is limited seating and availability is on a first come first serve basis.   When you register, you must select the track you plan to attend to allow us to adequately plan.

We will provide snacks during the breakout sessions; however, you will be on your own for lunch. You will be given 1 ½ hours for lunch each day.

If you have any questions, please contact Donna Florence at (404) 752-1660 or Ellis Purwanto at (404) 756-5045.

Thank you and we look forward to seeing you at the training sessions.

Banner Finance Conference Agenda

Division of Finance
Hosted by: The Controller's Office

Track 1	Understanding Accounting Transaction
Track 2	Understanding Kronos Time Entry Management and Supervisory Approval
Track 3	Understanding Grants Account Management
Track 4	Understanding the Requirements for Purchasing Goods and Services
Track 5	Understanding Budget Queries & Transfers

Tuesday, March 10, 2015

Time	Session	
8:30 a.m. – 9:00 a.m.	Registration	
9:00 a.m. – 10:30 a.m.	Introduction and Overview of Banner Training Conference - NCPC Auditorium	
10:30 a.m. – 10:45 a.m.	Break	
10:45 a.m. – 12:15 p.m.	Budget Queries & Transfer – NCPC eLab 104 (track#5)	Purchasing Goods & Services – NCPC 406 (track#4)
12:15 p.m. – 1:45 p.m.	Lunch (on your own)	
1:45 p.m. – 3:15 p.m.	Accounting Transactions – NCPC eLab 104 (track#1)	Grants Account Management – NCPC 124/126 (track#3)
3:15 p.m. – 3:30 p.m.	Break	
3:30 p.m. – 5:00 p.m.	Accounts Payable Processing – NCPC eLab 104 (track#1)	Time Entry Approval & Reporting – NCPC 103/105 (track#2)

Wednesday, March 11, 2015

Time	Session	
9:00 a.m. – 10:30 a.m.	Time Entry Approval & Reporting – NCPC 103/105 (track#2)	
10:30 a.m. – 10:45 a.m.	Break	
10:45 a.m. – 12:15 p.m.	Accounts Transaction Detail – RW eLab 103 (track#1)	Budget Queries and Transfer – NCPC 103/105 (track#5)
12:15 p.m. – 1:45 p.m.	Lunch (on your own)	
1:45 p.m. – 3:15 p.m.	Purchasing Goods and Services – RW eLab 103 (track#4)	Accounts Payable Processing – NCPC 124/126 (track#1)
3:15 p.m. – 3:30 p.m.	Break	
3:30 p.m. – 5:00 p.m.	Budget Queries and Transfer – RW eLab 103 (track#5)	Time Entry & Reporting – NCPC 103/105 (track#2)

Thursday, March 12, 2015

9:00 a.m. - 10:30 a.m.	Accounting Transaction Detail – NCPC eLab 104 (track#1)	Time Entry Approval & Reporting – NCPC 124/126 (track#2)	Purchasing Goods and Services – RW eLab 103 (track#4)
10:30 a.m. - 10:45 a.m.	Break		
10:45 a.m. - 12:15 p.m.	Accounts Payable Processing – NCPC eLab 104 (track#1)	Time Entry & Reporting – NCPC 124/126 (track#2)	Budget Queries and Transfer – RW eLab 103 (track#5)
12:15 p.m. - 1:45 p.m.	Lunch (on your own)		

1:45 p.m. - 3:15 p.m.	Accounting Transaction Detail – NCPC eLab 104 (track#1)	Banner Navigation and Understanding Banner FOAPAL – NCPC 103/105	Grants Account Management – Library eLab (track#3)	Purchasing Goods and Services – RW eLab 103 (track#4)
3:15 p.m. - 3:30 p.m.	Break			
3:30 p.m. - 5:00 p.m.	Accounts Payable Processing – NCPC eLab 104 (track#1)	Time Entry & Reporting – Library eLab (track#2)	Grants Account Management – NCPC 103/105 (track#3)	Budget Queries and Transfer – RW eLab 103 (track#5)

Friday, March 13, 2015

9:00 a.m. - 10:30 a.m.	Accounting Transaction Detail – NCPC eLab 104 (track#1)	Grants Account Management – NCPC 103/105 (track#3)	Purchasing Goods and Services – RW eLab 103 (track#4)
10:30 a.m. - 10:45 a.m.	Break		
10:45 a.m. - 12:15 p.m.	Accounts Payable Processing – NCPC 124/126 (track#1)	Time Entry & Reporting – NCPC eLab 104 (track#2)	Budget Queries and Transfer – RW eLab 103 (track#5)
12:15 p.m. - 1:45 p.m.	Lunch (on your own)		
1:45 p.m. - 3:15 p.m.	Banner Navigation and Understanding Banner FOAPAL – NCPC 103/105	Grants Account Management – NCPC eLab 104 (track#3)	Purchasing Goods and Services – RW eLab 103 (track#4)
3:15 p.m. - 3:30 p.m.	Break		
3:30 p.m. - 5:00 p.m.	Accounting Transaction Detail – NCPC eLab 104 (track#1)	Time Entry Approval & Reporting – NCPC 124/126 (track#2)	Budget Queries and Transfer – RW eLab 103 (track#5)

TOPIC	TARGET AUDIENCE	OVERVIEW
Introduction and Overview of Banner Training Conference		
Navigation	All Banner users.	This is a high level overview of Banner. You will learn basic Banner navigation and setting up Banner menu for frequently used screens through My Banner. This session will also provide an overview of Self Service Banner functionality, including: log in procedures; navigation; overview of available information.
Understanding Banner FOAPAL	Department Heads, Administrators, and those responsible for managing department account activity	This workshop is intended to give you an overview of the Banner chart of accounts. Identify fund, organization, account, program structure.
Track 1. Accounting Transaction Detail		
Viewing Department Account Transactions	Department Heads, Administrators, and those responsible for managing account activity	This workshop is intended to show you how to encumber transactions and how to view account activity. This workshop will offer instruction for better understanding of properly selecting Banner accounts when making purchases.
Submitting Invoices and Viewing Accounts Payable Transactions	Administrators, Department Heads, and those responsible for managing department account activity	This workshop will give a brief summary of how to submit invoices for payment, payment distribution, and to view vendor payments and its related documents. This workshop will give a brief summary of how travel requests and employee reimbursements are processed, the required documents, and the type of expenses that can be processed.
Track 2. Time Entry and Management		
Kronos Time Entry and Automated Leave Requests for Employees	All Employees	Employees will learn how to logon to the Kronos Time and Attendance site and enter the secure area using their User ID and their PIN. Users will see how to access their time sheet and how to enter "Exception Time" (in the case of salary employees) and their hours worked and leave taken (in the case of hourly employees). Users will learn how to submit their time sheet for approval. In addition, employees will learn where in Kronos they need to go to request future leave (time off) and create report of current and future accrual balances.
Kronos Time Entry – Approval	Supervisors	Employees, who are supervisors, will learn how to approve their subordinates time sheets in the Kronos Time and Attendance and where to locate the time sheets In addition they will see how to determine if their subordinates have not started their time sheet, how to return their subordinates time sheet for corrections, and how to set an employee to act as the supervisors "Proxy" in approving time sheets. Users will also learn how to run reports.

Track 3. Grants Proposals and Account Management		
Viewing Grant Transactions	Principle investigators, Grants Administrators, Sponsored Program Staff, individuals responsible for managing federal, state, or local grants	This workshop will provide information on how grants are managed in Banner. Users will learn how to view grant information such as the grant start/end date, status, available balances, activities, and your grant setups.
Track 4. Purchasing Goods and Services		
Initiating Requisitions	Administrative assistants with current responsibility to process departmental requests	This workshop is intended to familiarize users with how to create requisition and how to search the vendor database. The workshop will also provide an overview of the approval process, as well as, how to track the requisition from the purchase to the payment process.
Approving Requisitions	Supervisors with current responsibility to approve departmental requests	This workshop will familiarize users with the requisition approval process which includes how to determine if requisitions are awaiting approval, how to view requisition detail, and how to post decision.
Track 5. Account Budget & Transfers		
Understanding Budget	Department Heads, Administrators managing account activity	This workshop will provide information on how to logon to "Self Service" web site and to access budget status information by Account or Organizational Hierarchy.
Entering Budget Transfers	Administrative assistants with current responsibility to process departmental requests	Employees will learn how to process budget transfers via the Self Service Finance.