Project Team Meeting

May 16, 2003
How Do I’s
- What are they?
- Why are they important?
- What will be done with them?
<table>
<thead>
<tr>
<th>ID</th>
<th>Category</th>
<th>Process Name</th>
<th>How Do I....</th>
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</table>
| 1  | Compensation | Processing Payroll Transactions | • Put a new employee on the system  
• Change the funding source of an existing appointment  
• Process payments from OPS funds for a line item employee  
• Post changes in classification  
• Move an employee from one department to another  
• Process benefits choices  
• Implement mass transactions  
• Have I learned methods to solve documented issues regarding this activity  
• Have I learned benefits/value-adds of the Banner software |
• **How Do I...**
  - This is the title of the topic

• **Description**
  - This section should outline a detailed description of the topic that provides the context as well as the content for the reader.

• **University/Departmental Policy**
  - This section outlines the Federal, Accreditation, University and/or departmental policies that apply to this topic. It provides information on where the student/staff/parent might find the policy for their reference.

• **Required Documentation**
  - This section outlines any documents/forms that must be submitted by the student/parent to begin the process. It also outlines any documentation/forms that the staff must fill out for the entire process to be completed.

• **Requested By/Purpose**
  - This section outlines who the typical requesters of this topic might be. Additionally it outlines whether the requests come individually or in lists. If the reason why a customer needs this information is not clear from the description, this section outlines the purpose.

• **Process**
  - This section describes in bulleted format, each step of the process including such things as handoffs, appeals, wait times, etc.

• **Banner Procedures**
  - This section describes in bulleted format, each step of the procedure to be performed on the Banner system.
Why are they important?
- They identify the business tasks that comprise a process
- They provide a focus for training
- They will document how the business process is accomplished in BANNER?
What will be done with them?

- They will be used to create process documentation for all users
- They will be the foundation of user training objectives and training material
- They will provide structure for test plans and test cases?
• **How do I’s?**
  - Every user should generate a list that reflects the processes they do as part of their jobs
  - The Team Coordinators will review and consolidate these lists
  - These lists will be published to be used during training classes
  - Team Coordinators will designate members responsible for documenting the answers to the questions
How do I’s?

- Team Leaders will accumulate the documentation
- UWF Trainers will use the documentation to develop training classes
- Team Coordinators will use the documentation to prepare the test plan and test cases for a given functional area
- Team Leaders will use the documentation to prepare test plans for the functional modules
- Team Leaders will use the documentation to prepare Business Process Documentation for their Functional Area