Banner XE / 9 – Navigational Training

1. Introduction: Who we are, What’s changing and Why, and more resources...
   a. Banner Upgrade page for more info & resources: http://bannerupgrade.tamucc.edu
   b. Know issues we are still working though as of 1/11/18:
      HOLDs: use Banner 8 for HOLDs as we are building a new process in 9
      TIMEOUT: Set at 30 minutes, but seems to timeout sooner—again, researching it.
   c. Terminology in Banner 9 has changed:
      Banner INB => Banner AppNav
      Form => PAGE
      Block => SECTION
      Next Block (action) => GO (button)
      Rollback (action) => Start Over (button)
      Query => FILTER
      Shortcut key changes:
      Next Block (action): Cntl + PageDown => ALT + Page Down
      Previous Block (action): Cntl + PageUp => ALT + Page Up
      Rollback/Refresh: Shift F7 => F5
      NEW Person Search: 1). Position cursor in ID field
      2). Press the TAB key
      3). Type last name, first initial (can use % as wildcard)
      4). Press Enter key
      5). In ‘Extended Search’ window, select:
         ‘Press to see results’ (Name & ID only)
         ‘Person Detail’ (all Person detail)

2. Banner 9 Production/LIVE: https://banner.tamucc.edu and select ‘Banner 9’
   [Direct link: https://bxe-prod.tamucc.edu/applicationNavigator/ ]

3. Banner 9 – Navigational Demonstration:
   a. How to LOG IN to Banner 9 ‘AppNav’
   b. How to navigate to a Page, Save, Option Menu/Related Pages, Dynamic Help, etc.
   c. How to execute a Query/Filter/Person Search
   d. How to use the new Next Block shortcut
   e. How to run a Job Submission and view output

4. Subject Matter Experts – Business Unit leads to offer deeper trainings and/or QA:
   a. RECORDS: Christie Roberts and Mary Galvan
   b. ADMISSIONS:
      i. Undergrad-> Monica Martinez
      ii. Graduate-> Sandra Kureska
   c. FINANCIAL AID: Tracie Perez
   d. BUSINES OFFICE/BURSAR: Christina Holzheuser

Revision Date: 1/24/18 by MR