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. <u>Know issues</u> 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. <u>Terminology in Banner 9 has changed</u>:
      Banner INB => Banner **AppNav**
      Form => **PAGE**
      Block => **SECTION**
      Next Block (action) => **GO** (button)
      Rollback (action) => **Start Over** (button)
      Query => **FILTER**

      <u>Shortcut key changes</u>:
      Next Block (action):   Cntl + PageDown => **ALT** + Page Down
      Previous Block (action): Cntl + PageUp => **ALT** + Page Up
      Rollback/Refresh: Shift F7   => **F5**

      <u>NEW Person Search</u>:   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