

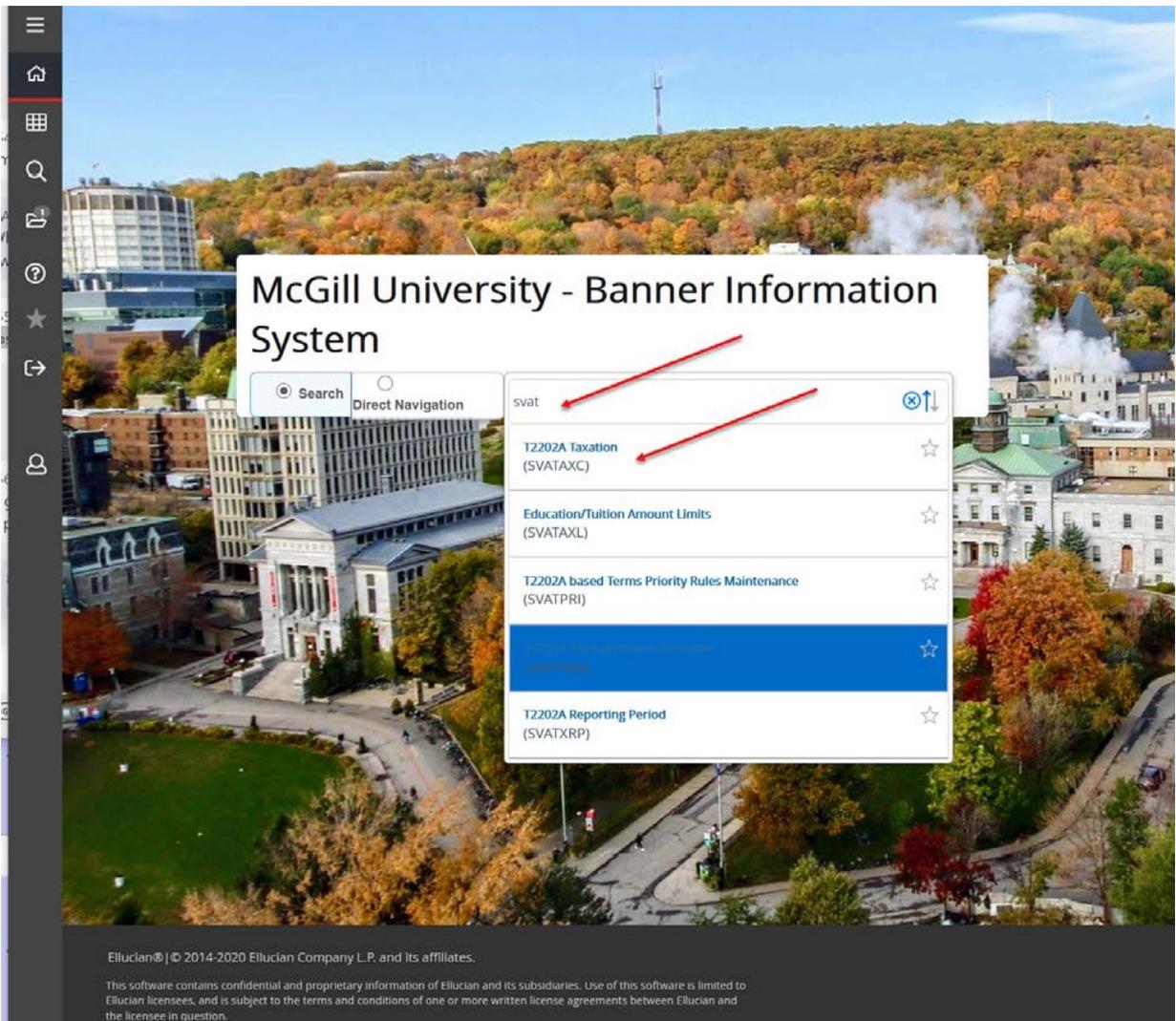
Banner 9 Navigation for Student Tax Receipts

URL: <https://horizon.mcgill.ca/applicationNavigator/>

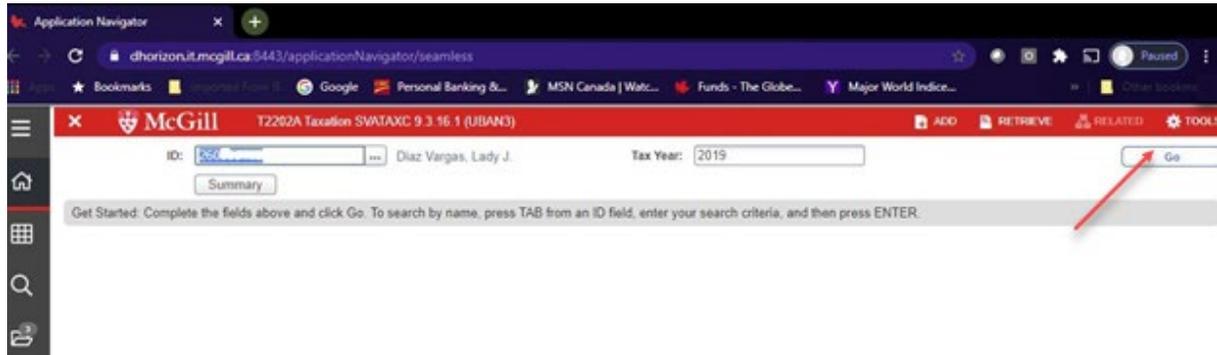
This URL will not be posted on the McGill website anywhere, so bookmark it or save it to your desktop. We suggest that you use Chrome or Firefox as a browser to access Banner 9.

Log in using your McGill username (first.last@mcgill.ca) and McGill password, and not your Banner username and password.

This is what the home screen looks like. To get to a form, start typing the form name in the textbox, then select the form you want to go to.



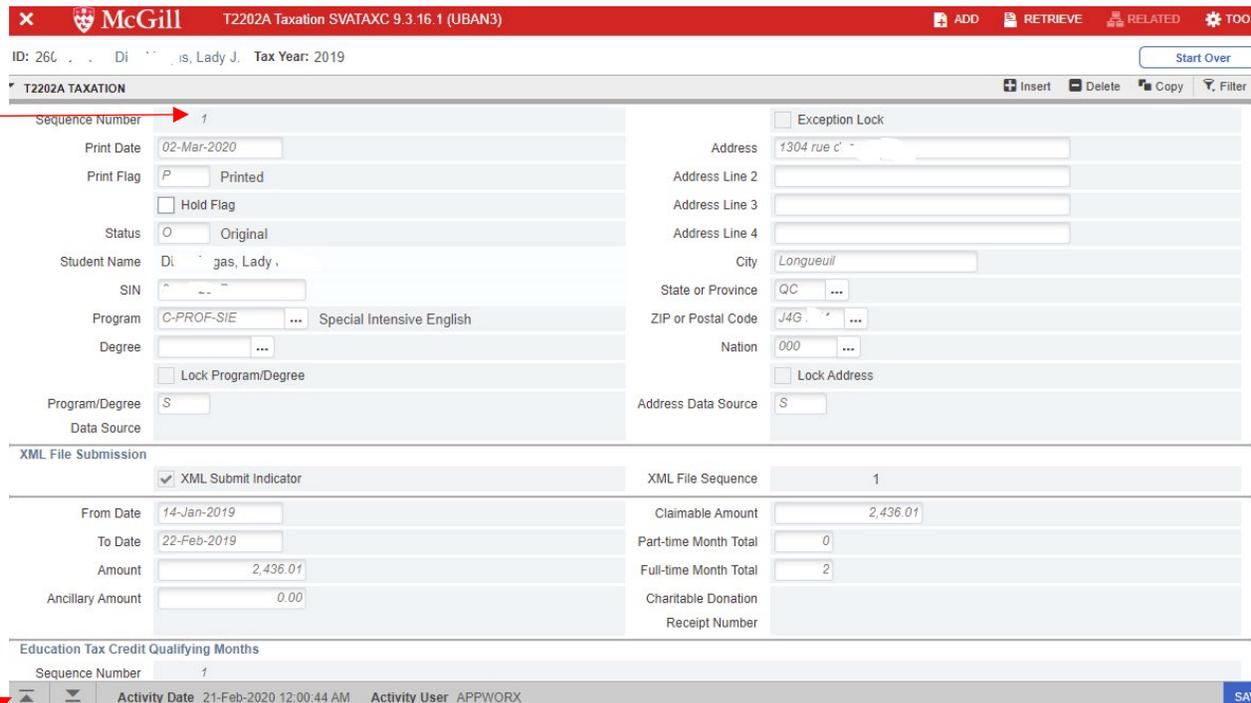
To select a student, type in the student ID, and the tax year. Click on the **Go** button at the top right-hand corner.



On SVATACX (T2202 form in Banner) you will see in the upper left-hand corner the sequence number of the transactions. The most recent transactions will always be the first one displayed.

To navigate through multiple records (sequence numbers) there will be left and right navigation arrows at the bottom left-hand side of the screen. There are different reasons why a student may have multiple sequences for a particular tax year. When students have made a payment that is pertinent to the tax year, there could be a second sequence of the record. To see a previous record, simply use your arrow keys to move from one record to the next.

To move from one block to another (Next Block/Previous Block) use the up and down arrow keys on the footer line to move from block to block. The shortcut keys are ALT + PGDN/ALT + PGUP.



On the second screen of SVATAXC, when you select a term, the rules governing that term for the number of months or the amount attributed to that period will display in either the Student Rule Calculation or the CRN calculation. This helps to determine the hours per week, which will inform the FT or PT month eligibility.

McGill T2202A Taxation SVATAXC 9.3.16.1 (UBAN3) ADD RETRIEVE RELATED

ID: 260 s, Lady J. Tax Year: 2019 Start Over

TUITION TAX CREDIT ELIGIBLE FEES Insert Delete Copy

Sequence Number	Term *	Multiple Tax Year Term	Campus Code	From Date *	To Date *	Amount	Ancillary Amount	Charitable Amount
1	201901		1	14-JAN-2019	22-FEB-2019	2,436.01	0.00	
					Total	2,436.01	0.00	

1 of 1 Per Page Record 1

Lock Tuition Comment

Tuition Data Source S

STUDENT RULE CALCULATION DETAIL Insert Delete Copy

Rule Type *	Student Calculation Rule Number	Student Exclusion Rule Number	Start Date *	End Date *	Hours per Week Equivalent

1 of 1 Per Page Record 1

Student Rule Weighted Term Percentage Remaining Balance

CRN RULE CALCULATION DETAIL Insert Delete Copy

CRN Rule Number *	CRN *	Meeting Time/Extension Number	Start Date *	End Date *	Actual Term Percentage	Hours per Week Equivalent	Valuated Term Percentage
20	10200	0	14-Jan-2019	22-Feb-2019	1	10.5	1
					Total	10.5	1

1 of 1 Per Page Record 1

CRN Rule Weighted Term Percentage Remaining Balance

Activity Date 21-Feb-2020 12:00:44 AM Activity User APPWORX

Note that if there is a recalculation of the receipt, the footer will display the date and the user who generated the transaction.

To select another student, select the **START OVER** button (top right).

Note that you can change the column widths to show more or less of a column.

The last block on SVATAXC shows the reporting periods and the total \$ and months attributed to each period.

The screenshot shows the McGill T2202A Taxation SVATAXC 9.3.16.1 (UBAN3) interface. The top navigation bar includes the McGill logo, the application name, and buttons for ADD, RETRIEVE, RELATED, and TOOLS. Below the navigation bar, the user ID is 26f, the name is Lady J., and the tax year is 2019. A 'Start Over' button is visible. The main content area is titled 'REPORTING PERIODS' and contains a table with the following data:

Sequence Number	Reporting Period *	From Month	To Month	Error Message	Amount	Ancillary Amount	Claimable Amount	Charitable Amount	Part-time Month Total	Full-time Month Total
1	1	1	4		2,436.01	0.00	2,436.01	0.00	0	2
2	2	5	8		0.00	0.00	0.00	0.00	0	0
3	3	9	12		0.00	0.00	0.00	0.00	0	0
Total					2,436.01	0.00	2,436.01	0.00	0	2

The 'Amount' column is circled in red. The interface also shows navigation controls at the bottom, including '1 of 1' and '10 Per Page', and a 'Record 3 of 3' indicator.

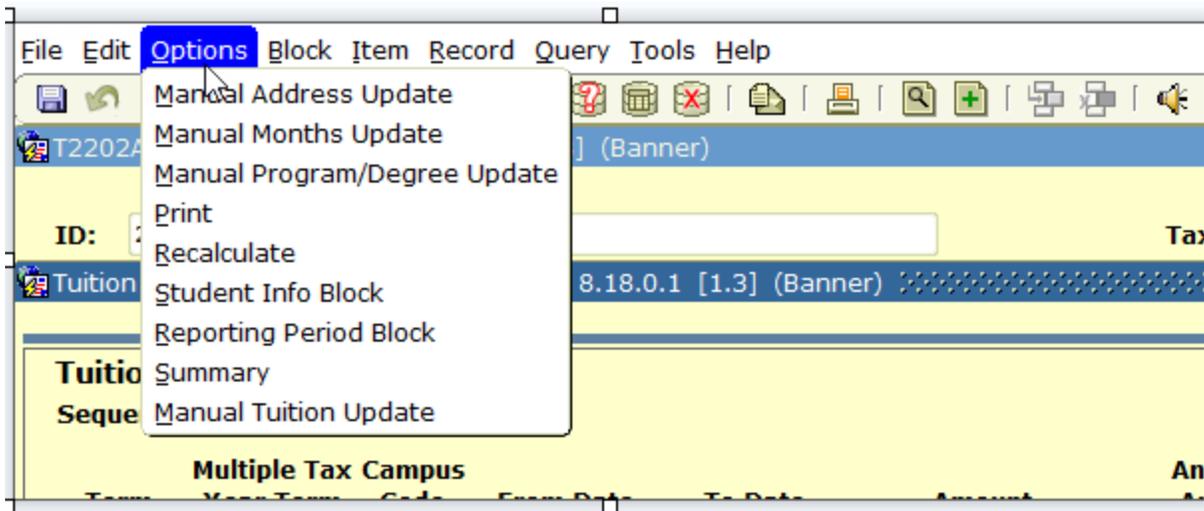
When you click on the **TOOLS** button, an options menu opens. For example, if the page allows you to Export, you will be able to export the data contained on the page to Excel. Note that TOOLS menu is scrollable via a greyed out bar beside the menu. To escape the TOOLS menu simply hit the ESC key.

The screenshot shows the McGill T2202A Taxation SVATAXC 9.3.16.1 (UBAN3) interface with the TOOLS menu open. The menu is scrollable and contains the following options:

- Search
- ACTIONS
 - Refresh (F5)
 - Export (Shift+F7)
 - Print Screenshot (Ctrl+Alt+P)
 - Clear Record (Shift+F4)
 - Clear Data (Shift+F5)
- Item Properties
- Display ID Image
- Exit Quickflow
- About Banner
- OPTIONS
 - Manual Address Update
 - Manual Months Update
 - Manual Program/Degree Update

A red arrow points to the TOOLS button in the top navigation bar. A green bracket highlights the menu options.

This screenshot shows that under Options in INB, you had effectively the same choices.

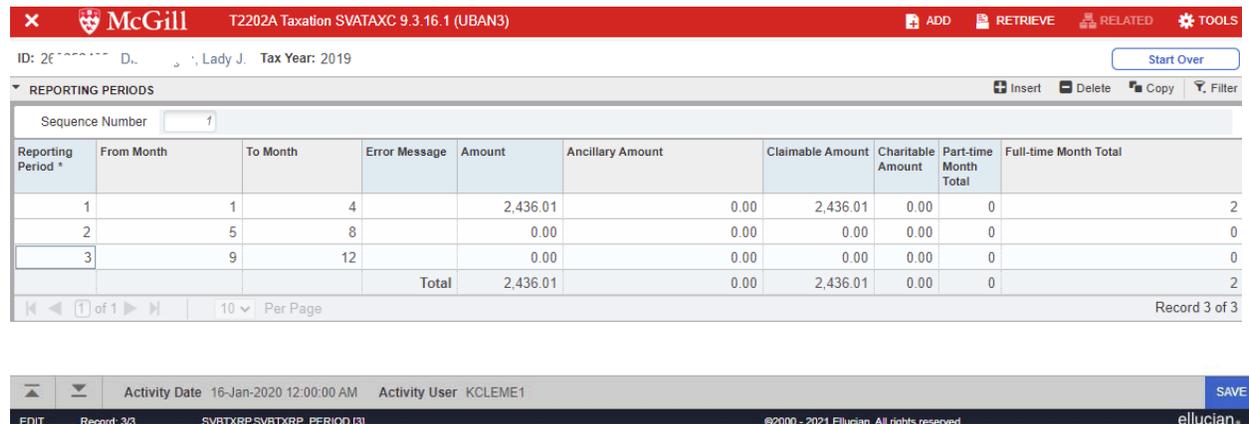


Shortcut keys

Some of the navigation buttons displayed below in INB that you have come to count on, are now not so visible within Banner 9 pages. Here are some shortcuts:



Save – little blue button – bottom right



Reporting Period *	From Month	To Month	Error Message	Amount	Ancillary Amount	Claimable Amount	Charitable Amount	Part-time Month Total	Full-time Month Total
1	1	4		2,436.01	0.00	2,436.01	0.00	0	2
2	5	8		0.00	0.00	0.00	0.00	0	0
3	9	12		0.00	0.00	0.00	0.00	0	0
Total				2,436.01	0.00	2,436.01	0.00	0	2

Rollback – F5 or refresh



Insert Record: F6 Remove

Record: Shift F6 Previous

Record: Arrow up Next

Record: Arrow down

Previous Block : Alt pgup

Next Block: Alt pgdn

Updated: February 16, 2021

Enter Query (search): F7

Opens a query box:

McGill T2202A Taxation SVATAXC 9.3.16.1 (UBAN3)

ADD RETRIEVE RELATED TOOLS 1

ID: ... Lady J. Tax Year: 2019

Enter a query; press F8 to execute.

TUITION TAX CREDIT ELIGIBLE FEES

Basic Filter Advanced Filter

Term Multiple Tax Year Term Campus Code From Date To Date

Add Another Field ...

Clear All Go

Term *	Multiple Tax Year Term	Campus Code	From Date *	To Date *	Amount	Ancillary Amount	Charitable Amount
201901		1	14-JAN-2019	22-FEB-2019	2,436.01	0.00	0.00
Total					2,436.01	0.00	0.00

Record 1 of 1

Lock Tuition Comment

Tuition Data Source S

STUDENT RULE CALCULATION DETAIL

Rule Type *	Student Calculation Rule Number	Student Exclusion Rule Number	Start Date *	End Date *	Hours per Week Equivalent
Student Rule Weinhart Term					Remaining Balance

Record 1 of 1

Clicking on the three ellipse (...) next to Campus Code, for example, brings up the campus code validation table where you can select which campus to search on. The date fields bring up the calendar.

Make your selection and tap F8 to execute – as per the hint at the top right hand corner. To exit the hint, press the yellow box at the extreme top right – in this case marked with a “1”. Tap GO to exit the query

Campus Validation (STVCAMP)



Criteria

Code	Description	Activity Date	Dict Code
1	Downtown	25-May-2002	
2	Macdonald	26-Sep-2001	
3	Off-Campus	17-Aug-1999	
50	Private Exempt	01-Aug-2001	
4	Distance	01-Aug-2001	
51	Downtown Private	01-Aug-2001	
52	Macdonald Private	01-Aug-2001	
53	Off-Campus Private	01-Aug-2001	
54	Distance Private	01-Aug-2001	

Navigation: 1 of 1 | 20 Per Page | Record 1 of 19

Cancel

OK

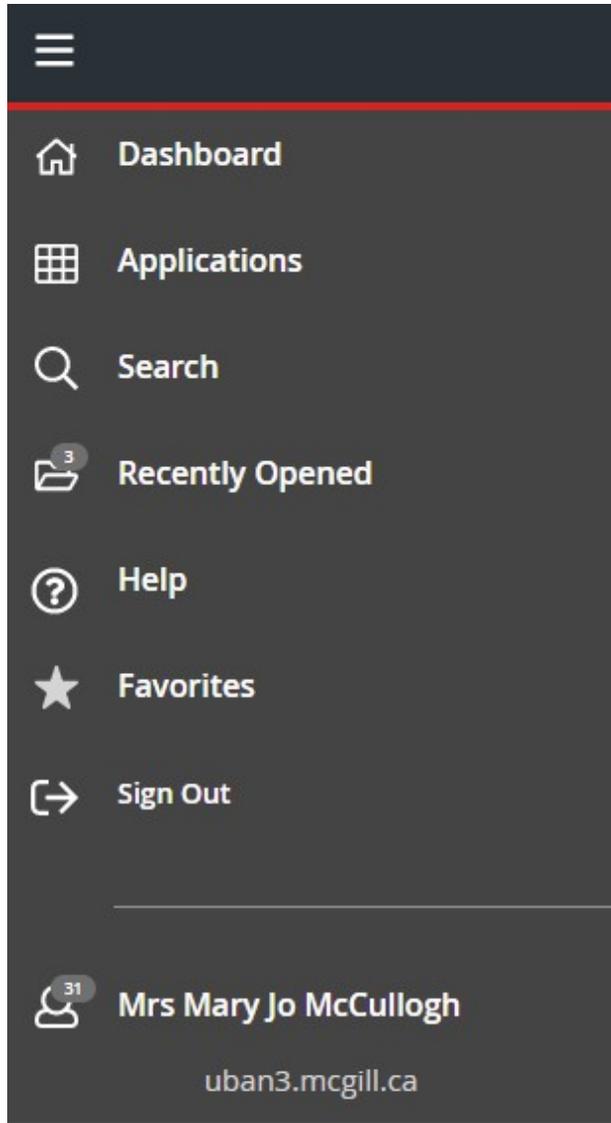
Note that you can Filter again, or clear your filter:

TUITION TAX CREDIT ELIGIBLE FEES | Insert | Delete | Copy | Filter

Active filters: Campus Code: 1 Clear All Filter Again

Let's explore the left side of the navigation screen:

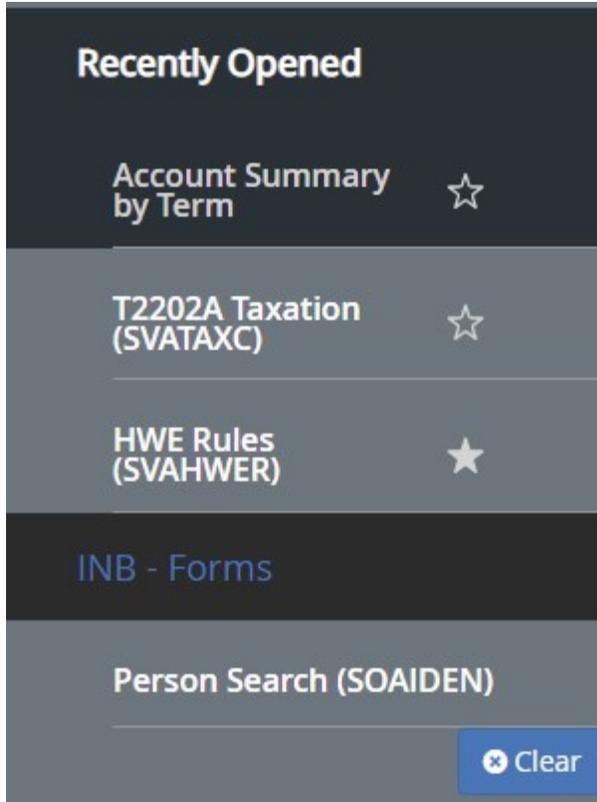




This displays the meaning of each icon

Applications brings up:
Banner Menus – like Student; Finance
Or your personalized Banner menu in My Banner

Note the Sign Out function



Recently Opened allows you to see what you have had opened. You can return to any of those pages. You can also “Clear” the history by hitting the button at the bottom.

Note that you cannot use Person Search here. Instead, use person search within the page you are accessing the person search. be



NOTE: In Banner 9, when searching by first or last name that has accents, if you do not enter the accents or wildcards % in your name search, the person will not be found.

The screenshot shows a database interface with a red navigation bar at the top containing icons and labels for 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS', along with a page number '2'. Below this, two green message boxes with checkmarks indicate: 'Query caused no records to be retrieved. Re-enter.' and 'Query canceled.'. At the bottom, a pagination bar shows '1 of 76858' (circled in red), a dropdown menu set to '20', and the text 'Per Page'. On the far right of the pagination bar, it says 'Record 1 of 1537146'.

Instead, type the name with an accent, if you know one exists, or type the name with a % in place of the accented character, i.e. d%gas.