## Banner 9 Navigation for Student Tax Receipts

#### URL: <a href="https://horizon.mcgill.ca/applicationNavigator/">https://horizon.mcgill.ca/applicationNavigator/</a>

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.

| <b>6</b> . A | plication Navigator | × 🕂                  |  |                                |                           |                      |   |                     |
|--------------|---------------------|----------------------|--|--------------------------------|---------------------------|----------------------|---|---------------------|
| € 3          | C a dhorizon        | sit.mogil.ca/8443/a  |  |                                |                           |                      | • | A R Paused I        |
| <b>1</b>     | 🛨 Bookmarks 📃       |                      | 🌀 Google 📜 Personal Banking &          | 🔮 MSN Canada   Watc 🕌          | Funds - The Globe         | Y Major World Indice |   | 🕶 📔 Other Sockers   |
| ≡            | × 😽 Mc              | Gill T2202           | A Taxation SVATAXC 9.3.16.1 (UBAN3)    |                                |                           | aco 🖬                |   | 🔏 RELATED 🛛 🔅 TOOLS |
| ය            | 10.                 | Summary              | m Diaz Vargas, Lady J.                 | Tax Year:                      | 2019                      |                      |   | Go                  |
| ⊞            | Get Started: Compl  | ete the fields above | and click Go. To search by name, press | TAB from an ID field, enter yo | ur search criteria, and t | hen press ENTER.     |   | /                   |
| Q            |                     |                      |  |                                |                           |                      |   |                     |
| 2            |                     |                      |  |                                |                           |                      |   |                     |

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.

| T2202A TAYATION      |                                      |                       |                | C Insert | Delete | Conv.   | ΎF |
|----------------------|--------------------------------------|-----------------------|----------------|----------|--------|---------|----|
| 12202A TAXATION      |                                      |                       |                | moon     | Delete | • 00099 |    |
| Sequence Number      | 1                                    |                       | Exception Lock |          |        |         |    |
| Print Date           | 02-Mar-2020                          | Address               | 1304 rue c'    |          |        |         |    |
| Print Flag           | P Printed                            | Address Line 2        |                |          |        |         |    |
|                      | Hold Flag                            | Address Line 3        |                |          |        |         |    |
| Status               | O Original                           | Address Line 4        |                |          |        |         |    |
| Student Name         | Di gas, Lady ,                       | City                  | Longueuil      |          |        |         |    |
| SIN                  | A                                    | State or Province     | QC             |          |        |         |    |
| Program              | C-PROF-SIE Special Intensive English | ZIP or Postal Code    | J4G            |          |        |         |    |
| Degree               |                                      | Nation                | 000            |          |        |         |    |
|                      | Lock Program/Degree                  |                       | Lock Address   |          |        |         |    |
| Program/Degree       | S                                    | Address Data Source   | S              |          |        |         |    |
| Data Source          |                                      |                       |                |          |        |         |    |
| XML File Submission  |                                      |                       |                |          |        |         | _  |
|                      | ✓ XML Submit Indicator               | XML File Sequence     | 1              |          |        |         |    |
| From Date            | 14-Jan-2019                          | Claimable Amount      | 2,436.01       |          |        |         |    |
| To Date              | 22-Feb-2019                          | Part-time Month Total | 0              |          |        |         |    |
| Amount               | 2,436.01                             | Full-time Month Total | 2              |          |        |         |    |
| Ancillary Amount     | 0.00                                 | Charitable Donation   |                |          |        |         |    |
|                      |                                      | Receipt Number        |                |          |        |         |    |
| Education Tax Credit | Qualifying Months                    |                       |                |          |        |         | _  |
| Sequence Number      | 1                                    |                       |                |          |        |         |    |

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.

|   |  |                             |   | XC 9.3.16.1 (U | JBAN3)                      |                                     |               |  | ADD                   |                                 | EVE 🕋       | RELATE          |
|---|--|-----------------------------|---|----------------|-----------------------------|-------------------------------------|---------------|--|-----------------------|---------------------------------|-------------|-----------------|
| ID: 260 -   | . E. 1   | s, Lac                      | ly J. Tax Year: 2019  |                |                             |                                     |               |  |                       |                                 |             |                 |
|   | CREDIT EL  | LIGIBLE FE                  | ES  |                |                             |                                     |               |  |                       | 🗄 Insert                        | Delete      | Co              |
| Sequence  | Number   | 1                           |   |                |                             |                                     |               |  |                       |                                 |             |                 |
| Term *  | Multiple Ta  | ax Year Ter                 | m Campus  | s Code         | From Date *                 | To Date *                           |               | Amount                                     | Ancillary Amou        | int                             | Charitable  | Amoun           |
| 201901  | ]  |                             | 1   |                | 14-JAN-2019                 | 22-FEB-2                            | 2019          | 2,4  | 36.01                 | 0.00                            |             |                 |
|   |  |                             |   |                |                             |                                     | Total         | 2,4  | 36.01                 | 0.00                            |             |                 |
| K < 1   | of 1 🕨 🕅   |                             | 5 🗸 Per Page  |                |                             |                                     |               |  |                       |                                 |             | 1               |
|   |  | Lock T                      | uition  |                |                             | Com                                 | ment          |  |                       |                                 |             |                 |
| Tuition Dat   | a Source   | S                           |   |                |                             |                                     |               |  |                       |                                 |             |                 |
| STUDENT R   | ULE CALCU  | LATION DE                   | TAIL  |                |                             |                                     |               |  |                       | 🔒 Insert                        | 🗖 Delete    | Pe Co           |
| Rule Type *   | Stude  | ent Calculat                | tion Rule Number  | Stu            | Ident Exclusion R           | ule Number                          |               | Start Date *                               | End Date *            | Hours per W                     | Veek Equiva | lent            |
|   |  |                             |   |                |                             |                                     |               |  |                       |                                 |             |                 |
|   |  |                             |   |                |                             |                                     |               |  |                       |                                 |             |                 |
|   | of 1 🕨 🕅   |                             | 5 🗸 Per Page  |                |                             |                                     |               |  |                       |                                 |             |                 |
| K ◀ 1 0<br>Stud   | of 1 🕨 刘<br>Ient Rule  |                             | 5 🗸 Per Page  |                |                             | R                                   | emaining Bal  | ance                                       |                       |                                 |             |                 |
| K I Stud<br>Weigh   | of 1   | 4                           | 5 🔻 Per Page  |                |                             | R                                   | emaining Bal  | ance                                       |                       |                                 |             |                 |
| Stud<br>Veigh<br>Pe   | lent Rule<br>ted Term<br>rcentage  | 1                           | 5 V Per Page  |                |                             | R                                   | temaining Bal | ance                                       |                       |                                 |             |                 |
| K CRN RULE C  | of 1 > > > > > > > > > > > > > > > > > >   | DN DETAIL                   | 5 v Per Page  |                |                             | R                                   | temaining Bal | ance                                       |                       | Insert                          | Delete      | C               |
| K I Stud<br>Stud<br>Weigh<br>Pe<br>CRN RULE C<br>CRN RULE O   | of 1 > M<br>lent Rule<br>ted Term<br>rcentage  | ON DETAIL<br>CRN *          | 5 v Per Page  | mber           | Start Date *                | End Date *                          | Actual Term   | ance                                       | ours per Week Equival | E Insert                        | Delete      | T C             |
| Stud<br>Weigh<br>Pe<br>CRN RULE C<br>CRN RULE O   | of 1 All the ted Term recentage  | DN DETAIL<br>CRN *<br>10200 | 5 V Per Page  | mber<br>0      | Start Date *<br>14-Jan-2019 | End Date *<br>22-Feb-2019           | Actual Term   | ance<br>Percentage F<br>1                  | ours per Week Equival | ent Va<br>10.5                  | Delete      | T C             |
| K CRN RULE C<br>CRN RULE C  | ent Rule<br>ted Term<br>rcentage<br>CALCULATIC<br>aber *<br>20                                       | DN DETAIL<br>CRN *<br>10200 | 5 V Per Page  | mber<br>0      | Start Date *<br>14-Jan-2019 | End Date *<br>22-Feb-2019           | Actual Term   | ance<br>Percentage F<br>1<br>Total         | ours per Week Equival | Insert     Va     10.5     10.5 | Delete      | ¶∎ C<br>n Perce |
| Image: Market of the second | of 1 Alent Rule<br>ted Term<br>rcentage<br>CALCULATIC<br>aber *<br>20                                | DN DETAIL<br>CRN *<br>10200 | 5 v     Per Page   Meeting Time/Extension Nu       5 v     Per Page         | mber 0         | Start Date *<br>14-Jan-2019 | R<br>End Date *<br>22-Feb-2019      | Actual Term   | ance<br>I Percentage F<br>1<br>Total       | ours per Week Equival | ent Va<br>10.5<br>10.5          | Delete      | F C             |
| CRN RULE C<br>CRN RULE C<br>CRN RULE C  | of 1 > H<br>lent Rule<br>ted Term<br>rcentage<br>CALCULATIC<br>liber *<br>20<br>of 1 > H<br>Veighted | ON DETAIL<br>CRN *<br>10200 | 5 v     Per Page   Meeting Time/Extension Nu       5 v     Per Page       1 | mber 0         | Start Date *<br>14-Jan-2019 | R<br>End Date *<br>22-Feb-2019<br>R | Actual Term   | ance<br>Percentage F<br>1<br>Total<br>ance | ours per Week Equival | ent Va<br>10.5<br>10.5          | Delete      | Perce           |

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.

| × 😽 McC            | Gill T22          | 202A Taxation | SVATAXC 9.3.16.1 (UBA | AN3)     |                  |                  | 🔒 add  🖺 Re       | TRIEVE                      | 🛓 RELATED 🛛 🌞 TOOLS   |  |  |  |  |
|--------------------|-------------------|---------------|-----------------------|----------|------------------|------------------|-------------------|-----------------------------|-----------------------|--|--|--|--|
| ID: 260 Dia        | , , Lady J.       | Tax Year: 20  | )19                   |          |                  |                  |                   |                             | Start Over            |  |  |  |  |
| REPORTING PERIODS  |                   |               |                       |          |                  |                  |                   |                             |                       |  |  |  |  |
| Sequence Number    | Sequence Number 1 |               |                       |          |                  |                  |                   |                             |                       |  |  |  |  |
| Reporting Period * | From Month        | To Month      | Error Message         | Amount   | Ancillary Amount | Claimable Amount | Charitable Amount | Part-time<br>Month<br>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                     |  |  |  |  |
|                    | 10 🗸              | Per Page      |                       |          |                  |                  |                   |                             | Record 3 of 3         |  |  |  |  |

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 TOOLSs menu simply hit the ESC key.

| ID: 20.               | Di , Lady     | J. Tax Year: 2019 |               |                         |                  |                  | 1                    | Q Search  |            |
|-----------------------|---------------|-------------------|---------------|-------------------------|------------------|------------------|----------------------|---|------------|
| REPORTIN              | G PERIODS     |                   |               |                         |                  |                  | -                    | ACTIONS   |            |
| Sequenc               | e Number 1    |                   |               |                         |                  |                  |                      | Refresh   | F5         |
| Reporting<br>Period * | From Month    | To Month          | Error Message | Amount                  | Ancillary Amount | Claimable Amount | Charitable<br>Amount | Export  | Shifter    |
| 1                     |               | 1 4               |               | 2,436.01                | 0.00             | 2,436.01         | 0.00                 | Print Screenshot  | Ctrl+Alt+P |
| 2                     |               | 5 8               |               | 0.00                    | 0.00             | 0.00             | 0.00                 |   |            |
| 3                     |               | 9 12              |               | 0.00                    | 0.00             | 0.00             | 0.00                 | Clear Record  | Shift+F4   |
|                       |               |                   | Total         | 2,436.01                | 0.00             | 2.436.01         | 0.00                 |   |            |
| k ◀ ①                 | of 1 🎽 📔 10   | ) ✓ Per Page      |               | 2 (00.46) 503 500 700 5 |                  |                  |                      | Clear Data<br>Item Properties   | Shift+F5   |
| k ⊲ 1                 | of 1 🍉 Η 👘 10 | ) ✓ Per Page      |               |                         |                  |                  |                      | Clear Data<br>Item Properties<br>Display ID Image<br>Exit Quickflow   | Shift+F5   |
| K < 1                 | of 1 ▶ 🛉 10   | v   Per Page      |               |                         |                  |                  |                      | Clear Data<br>Item Properties<br>Display ID Image<br>Exit Quickflow<br>About Banner   | Shift+F5   |
|                       | of 1 ▶ 🦂 10   | v   Per Page      |               |                         |                  |                  |                      | Clear Data<br>Item Properties<br>Display ID Image<br>Exit Quickflow<br>About Banner<br>OPTIONS  | Shift+F5   |
|                       | of 1 🕨 🕅 10   | v   Per Page      |               |                         |                  |                  |                      | Clear Data<br>Item Properties<br>Display ID Image<br>Exit Quickflow<br>About Banner<br>OPTIONS<br>Manual Address Update                         | Shift+F5   |
| H < (                 | of 1 ▶ 🛉 10   | v Per Page        |               |                         |                  |                  |                      | Clear Data<br>Item Properties<br>Display ID Image<br>Exit Quickflow<br>About Banner<br>OPTIONS<br>Manual Address Update<br>Manual Months Update | Shift+F5   |

| ٦ |              |        |                              |   |
|---|--------------|--------|------------------------------|---|
|   | <u>F</u> ile | Edit   | Options Block Item Record Qu | ery <u>T</u> ools <u>H</u> elp              |
|   |              | 5      | Manwal Address Update        | 🚱 📾 😫 l 💁 l 📇 l 🖳 🖳 🔛 l 😓 🖓                 |
|   | CT B         | 22024  | Manual Months Update         | 1 (Banner)                                  |
| ľ | 220          |        | Manual Program/Degree Update | 1 (   |
|   |              |        | Print                        |   |
|   | 11           | ): [   | Recalculate                  | la  |
|   | 🧑 Τι         | lition | Student Info Block           | 8.18.0.1 [1.3] (Banner) 2000000000000000000 |
|   |              |        | Reporting Period Block       |   |
|   | Т            | uitio  | Summary                      |   |
|   | s            | eque   | Manual Tuition Update        |   |
|   |              |        | Multiple Tax Campus          | <b>A</b>                                    |
|   |              | т      | Multiple Tax Campus          | An A    |
| J |              |        |                              |   |

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

| ×   | McGill T          | 2202A Taxation SVA | TAXC 9.3.16.1 | (UBAN3)  |                  |                  | 🔒 AI                 | a 📲 ac                      | RETRIEVE  | 🖧 REL       | ATED    | tools     |  |  |
|---|-------------------|--------------------|---------------|----------|------------------|------------------|----------------------|-----------------------------|-----------|-------------|---------|-----------|--|--|
| ID: 261000  | Dia Strady .      | Tax Year: 2019     |               |          |                  |                  |                      |                             |           | C           | Start C | ver       |  |  |
| ' REPORTING PERIODS 🕒 Insert 🗖 Delete 🖣 Copy 🔍 Filt |                   |                    |               |          |                  |                  |                      |                             |           |             |         |           |  |  |
| Sequenc   | Sequence Number 1 |                    |               |          |                  |                  |                      |                             |           |             |         |           |  |  |
| Reporting<br>Period *                               | From Month        | To Month           | Error Message | Amount   | Ancillary Amount | Claimable Amount | Charitable<br>Amount | Part-time<br>Month<br>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         |  |  |
| K ◀ 1   | of 1 🕨 🔰 🛛 10     | ✓ Per Page         |               |          |                  |                  |                      |                             |           |             | Reco    | rd 3 of 3 |  |  |
|   |                   |                    |               |          |                  |                  |                      |                             |           |             |         |           |  |  |

Activity Date 16-Jan-2020 12:00:00 AM Activity User KCLEME1

E0IT Record 3/a SVBTXRP.SVBTXRP\_FERIOD(3)

#### 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

#### Enter Query (search): F7

#### Opens a query box:

| × 🎕                               | McGill T2202A Taxat   | ion SVATAXC 9.3.16.         | 1 (UBAN3)                                       |  |  | add 🖺 Retrieve 🛔                                       |   |
|-----------------------------------|---|-----------------------------|---|--|--|--|---|
| ID: 1 Joc 11 A                    | Dia Lady J. Tax Year  | 2019                        |   | 1  | <b>O</b>   | Enter a query; press F8 to exe                         | cute.   |
| TUITION TAX                       | CREDIT ELIGIBLE FEES  |                             |   |  |  | 🖬 Insert   | Delete 📲 Copy 🏹 Filter  |
| Basic Filter                      | Advanced Filter   |                             |   |  |  |  | o   |
| Term                              | Multip  | le Tax Year Term            | Campu   | ıs Code  | From Date  | To Date  | •   |
| Add Anothe                        | er Field 👻  |                             |   |  |  |  |   |
|                                   |   |                             |   |  |  |  | Clear All Go  |
|                                   |   |                             |   |  |  |  | · · · · · · · · · · · · · · · · · · ·   |
| Sequence                          | Number 1  |                             |   |  |  |  |   |
| Sequence                          | Number 1<br>Multiple Tax Year Term  | Campus Code                 | From Date *                                     | To Date *  | Amount   | Ancillary Amount                                       | Charitable Amount   |
| Sequence<br>Term *<br>201901      | Number 1<br>Multiple Tax Year Term  | Campus Code                 | From Date *<br>14-JAN-2019                      | To Date *<br>22-FEB-2019   | Amount 2,436.01                                    | Ancillary Amount                                       | Charitable Amount   |
| Sequence<br>Term *<br>201901      | Number 1<br>Multiple Tax Year Term  | Campus Code<br>1            | From Date *<br>14-JAN-2019                      | To Date *<br>22-FEB-2019<br>Total                                  | Amount<br>2,436.01<br>2,436.01                     | Ancillary Amount 0.00 0.00                             | Charitable Amount 0.00 0.00   |
| Sequence<br>Term *<br>201901      | Number 1<br>Multiple Tax Year Term  | Campus Code<br>1            | From Date *<br>14-JAN-2019                      | To Date *<br>22-FEB-2019<br>Total                                  | Amount 2,436.01 2,436.01                           | Ancillary Amount<br>0.00<br>0.00                       | Charitable Amount<br>0.00<br>0.00<br>Record 1 of 1  |
| Sequence<br>Term *<br>201901      | Number 1<br>Multiple Tax Year Term  | Campus Code<br>1            | From Date *<br>14-JAN-2019                      | To Date * 22-FEB-2019 Total Comment                                | Amount<br>2,436.01<br>2,436.01                     | Ancillary Amount<br>0.00<br>0.00                       | Charitable Amount<br>0.00<br>0.00<br>Record 1 of 1  |
| Sequence<br>Term *<br>201901      | Number 1<br>Multiple Tax Year Term<br>of 1 >>> 5 >> Per Pag<br>Lock Tuition<br>a Source S   | Campus Code<br>1<br>e       | From Date *<br>14-JAN-2019                      | To Date * 22-FEB-2019 Total Comment                                | Amount<br>2,436.01<br>2,436.01                     | Ancillary Amount<br>0.00<br>0.00                       | Charitable Amount<br>0.00<br>0.00<br>Record 1 of 1  |
| Sequence<br>Term *<br>201901<br>K | Number 1<br>Multiple Tax Year Term<br>f1  | Campus Code<br>1            | From Date *<br>14-JAN-2019                      | To Date * 22-FEB-2019 Total Comment                                | Amount<br>2,436.01<br>2,436.01                     | Ancillary Amount<br>0.00<br>0.00                       | Charitable Amount<br>0.00<br>0.00<br>Record 1 of 1<br>Delete Copy T, Filter                                     |
| Sequence<br>Term *<br>201901<br>K | Number 1<br>Multiple Tax Year Term<br>f1 ► F 5 ∨ Per Pag<br>□ Lock Tuition<br>a Source S<br>JLE CALCULATION DETAIL<br>Student Calculation Rule Number                       | Campus Code<br>1<br>e       | From Date * 14-JAN-2019 tudent Exclusion Rule I | To Date *       22-FEB-2019       Total       Comment       Number | Amount<br>2,436.01<br>2,436.01<br>Start Date * End | Ancillary Amount 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0. | Charitable Amount<br>0.00<br>0.00<br>Record 1 of 1<br>Delete Copy T, Filter<br>reek Equivalent                  |
| Sequence<br>Term *<br>201901<br>K | Number 1<br>Multiple Tax Year Term<br>of 1 ► H 5 ~ Per Pag<br>□ Lock Tuition<br>a Source S<br>JLE CALCULATION DETAIL<br>Student Calculation Rule Number                     | Campus Code<br>1<br>e<br>Si | From Date * 14-JAN-2019 tudent Exclusion Rule F | To Date *       22-FEB-2019       Total       Comment       Number | Amount<br>2,436.01<br>2,436.01<br>Start Date * End | Ancillary Amount 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0. | Charitable Amount<br>0.00<br>0.00<br>Record 1 of 1<br>Delete Copy T, Filter<br>reek Equivalent                  |
| Sequence<br>Term *<br>201901<br>K | Number 1<br>Multiple Tax Year Term<br>f1 ► F 5 ~ Per Pag<br>□ Lock Tuition<br>a Source S<br>JLE CALCULATION DETAIL<br>Student Calculation Rule Number<br>f1 ► F 5 ~ Per Pag | Campus Code 1 1 Si          | From Date * 14-JAN-2019 tudent Exclusion Rule I | To Date *       22-FEB-2019       Total                            | Amount 2,436.01<br>2,436.01<br>Start Date * End    | Ancillary Amount 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0. | Charitable Amount<br>0.00<br>0.00<br>Record 1 of 1<br>Delete Copy T, Filter<br>reek Equivalent<br>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)

| Code       | Description              | Activity Date | Dicd<br>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   |              |
| <b>K</b> - | I of 1 ► ► 20 ► Per Page | R             | ecord 1 of 1 |

×

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

|                 | TUITION TAX CREDIT ELIGIBLE FEES |  |   |          |      |
|-----------------|----------------------------------|--|---|----------|------|
| Active filters: | Campus Code: 1 Clear All         |  | ( | Filter A | gain |
|                 |                                  |  |   |          |      |

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



# ≡

# 슈 Dashboard

Ξ

Applications

Q Search

🗁 Recently Opened

? Help

🛧 Favorites

〔→ Sign Out

Mrs Mary Jo McCullogh گئ

uban3.mcgill.ca

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              |         |
|------------------------------|---------|
| Account Summary<br>by Term   | ☆       |
| T2202A Taxation<br>(SVATAXC) | ☆       |
| HWE Rules<br>(SVAHWER)       | *       |
| INB - Forms                  |         |
| Person Search (SOA           | NDEN)   |
|                              | 🙁 Clear |

| ×      | 😽 McGill               | Perso   | n Search SOAIDEN 9.3.12 (U | BAN3)       |             |            |        | 🔒 ADD        |                   | RELATED    | 🔆 TOOLS   | 1       |
|--------|------------------------|---------|----------------------------|-------------|-------------|------------|--------|--------------|-------------------|------------|-----------|---------|
| * PERS | ON SEARCH              |         |                            |             |             |            |        | 📀 Enter a qu | uery; press F8 to | o execute. |           |         |
| Basic  | Filter Advanced Filter |         |                            |             |             |            |        |              |                   |            |           | 8       |
| ID     |                        | •       | Last Name                  | •           | First Name  | 0          | Middle | Name         | 0                 |            |           |         |
|        |                        |         |                            |             |             |            |        |              |                   |            |           |         |
| Chang  | e Indicator            |         | •                          |             |             |            |        |              |                   |            |           |         |
|        |                        |         | Add A                      | nother Fiel | d 🗸         |            |        |              |                   |            |           |         |
|        |                        |         |                            |             |             |            |        |              |                   |            | Clear All | Go      |
| ID     | Last Name              | •       | First Name                 |             | Middle Name | Birth Date |        | Change Indic | ator Prefi        | ix         | Suffix    |         |
| .4     |                        |         |                            |             |             |            |        |              |                   |            |           | Þ       |
| € ⊲    | 1) of 1 🕨 🕅            | 10 🗸    | Per Page                   |             |             |            |        |              |                   |            | Record    | 11 of 1 |
| O Cas  | e Insensitive Query    | Case Se | nsitive Query              |             |             |            |        |              |                   |            |           |         |

**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.



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.