

Applications

- _RSTAMP
- B-G-ID
- B-R-ID
- B-R-TREQ
- B-R-TREQ_AC
- B-R-TREQ_AT
- B-R-TREQ_DI
- B-R-TREQ_DR
- B-R-TREQ_FS
- B-R-TREQ_GB
- B-R-TREQ_GS
- B-R-TREQ_LW
- B-R-TREQ_MD
- B-R-TREQ_MG
- B-R-TREQ_MU
- B-R-TREQ_NR
- B-R-TREQ_PA
- B-R-TREQ_PH
- B-S-ADMN
- B-S-CRSE
- B-S-DGRE
- B-S-ID
- B-S-SECT
- DININGAP

Welcome to AppEnhancer Web Access

AppEnhancer 24.4

Banner Document Management System — Work Instructions

Previously known as ApplicationXtender / AppX



Contents

- [Pre-requisites](#)
- [Viewing existing documents](#)
- [Drag-n-drop new documents](#)
- [Create batch manually](#)
- [Index existing batch](#)

Pre-requisites for AppX web client

- Firefox / Chrome / Edge / Safari – all OK
- AppX PROD link: <https://bannerappx.yale.edu>
- Appx TEST link: <https://bannerappx-test.yale.edu>

Viewing documents

What to do when you want to view a document that has been previously indexed.

Viewing documents

Click on the application you want to view documents from

opentext | AppEnhancer™ CE 24.4 - BAN3

SYSOP

Applications

▸ _RSTAMP

▸ B-G-ID

▸ B-R-ID

▸ B-R-TREQ

▸ B-R-TREQ_AC

▸ B-R-TREQ_AT

▸ B-R-TREQ_DI

▸ B-R-TREQ_DR

▸ B-R-TREQ_FS

▸ B-R-TREQ_GB

▸ B-R-TREQ_GS

▸ B-R-TREQ_LW

▸ B-R-TREQ_MD

▸ B-R-TREQ_MG

▸ B-R-TREQ_MU

▸ B-R-TREQ_NR

▸ B-R-TREQ_PA

▸ B-R-TREQ_PH

▸ B-S-ADMN

▸ B-S-CRSE

▸ B-S-DGRE

▸ B-S-ID

▸ B-S-SECT

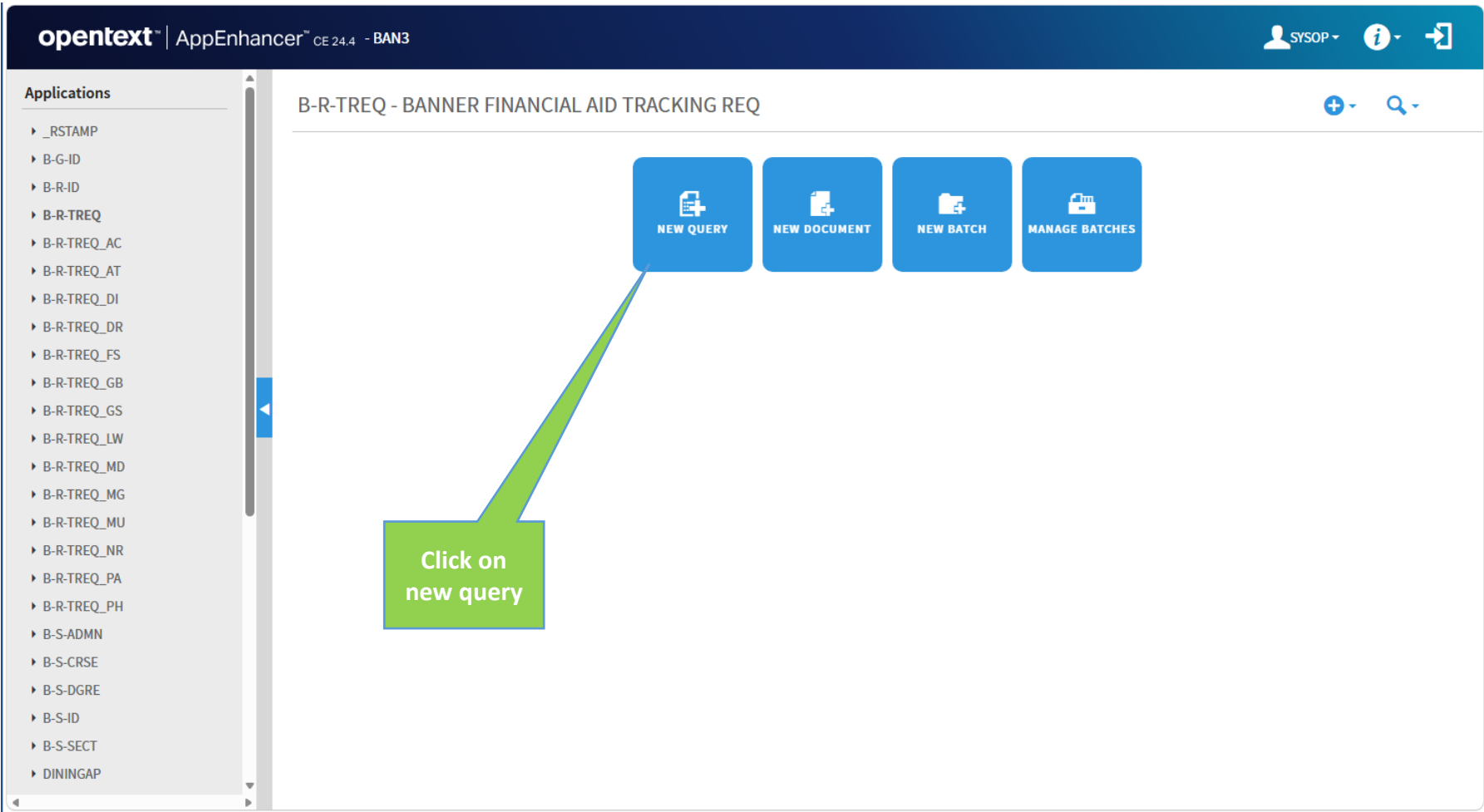
▸ DININGAP

Welcome to AppEnhancer Web Access

AppEnhancer Web Access allows you to manage all types of AppEnhancer documents.

By using AppEnhancer Web Access and a standard Web browser, you can create, index, retrieve, access, view, and manage AppEnhancer documents through the Internet.

Viewing documents



Viewing documents

The screenshot shows the 'opentext AppEnhancer CE 24.4 - BAN3' interface. On the left is a sidebar titled 'Applications' with a list of items including '_RSTAMP', 'B-G-ID', 'B-R-ID', 'B-R-TREQ', and various 'B-R-TREQ_' sub-items. The main area is titled 'New Search - B-R-TREQ'. It contains a 'Search Criteria' section with the instruction 'Enter a search term in the index fields to filter your results.' Below this are several input fields: 'ID' (containing '925'), 'PIDM', 'DOCUMENT TYPE' (with a dropdown icon), 'LAST NAME', 'FIRST NAME', 'SSN', 'BIRTH DATE' (with a calendar icon), 'AID YEAR' (with a range selector showing '2627' to '2526'), 'TRACKING REQUIREMENT', 'TRACKING STATUS', 'FUND', 'SOURCE/INST CODE', and 'PERIOD'. At the bottom are three buttons: 'RUN', 'SAVE', and 'CANCEL'. A green callout box with a blue border points to the 'ID' field, containing the text 'Enter your search criteria and click Run'.

Wildcard searches use an asterisk. For example, to search for anyone with a last name containing “Mark”, enter the value *MARK*, *Mark* or *mark* in the Last Name field.

When searching on Residential College, always enclose the name of the residential college in asterisks. Example: *MORSE*

Viewing documents

Hover over the document icon to preview the document.

Click on the document icon to open the file.

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Applications

_RSTAMP

B-G-ID

B-R-ID

B-R-TREQ

B-R-TREQ_AC

B-R-TREQ_AT

B-R-TREQ_DI

B-R-TREQ_DR

B-R-TREQ_FS

B-R-TREQ_GB

B-R-TREQ_MD

B-R-TREQ_MG

B-R-TREQ_MU

B-R-TREQ_NR

B-R-TREQ_PA

B-R-TREQ_PH

B-S-ADMN

B-S-CRSE

B-S-DGRE

B-S-ID

B-S-SECT

DININGAP

DININGCASH

DININGCATERING

DININGCREDITCARD

DININGHR

DININGJOBS

GRADREG

OISS

SAR

Query Results

B-R-TREQ > New Search > Query Results

Text Search

	ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE	AID YEAR	TRACKING REQUIREMENT	TRACKING STATUS	FUND	SOURCE/INST CODE	PER
☐	 92	2	TRACKING REQUIREMENT	M	N		1	2627	RFR01	R			
☐	 92	2	TRACKING REQUIREMENT	M	N		1	2627	XUOSUF	R			
☐	 92	2	TRACKING REQUIREMENT	M	N		1	2526	PW224				
☐	 92	2	TRACKING REQUIREMENT	M	N		1	2526	MISC	R			
☐	 92	2	TRACKING REQUIREMENT	M	N		1	2526	BUCKLE	R			
☐	 92	2	TRACKING REQUIREMENT	M	N		1	2526	XUOSUF	S			
☐	 92	2	TRACKING REQUIREMENT	M	N		1	2526	PTRN24	R			
☐	 92	2	TRACKING REQUIREMENT	M	N		1	2526	RFR01	D			

Documents 1 - 8 of 8

Previous

1

Next

Items per page: 25

If you hold the mouse over the document icon, the application will display a preview of the first page of the document.

If there is only one search result, AppXtender will skip this page and immediately display the document.

Reviewed September 2026

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Viewing documents

The screenshot displays the AppEnhancer interface for viewing a document. The top navigation bar includes the breadcrumb **STUDOCs-YC > New Search > Query Results > 92**. The document viewer shows a document titled **ER&M 3083 | Fall 2025** with sections for **LEARNING OBJECTIVES**, **REQUIRED MATERIALS**, and **ASSIGNMENTS AND GRADING**. A sidebar on the right contains document index values: **ID** (925), **PIDM** (2), **DOCUMENT TYPE** (MISCELLANEOUS), **LAST NAME** (V), **FIRST NAME** (A), **BIRTH DATE** (2), **RESIDENTIAL COLLEGE** (SAYBROOK), **ATTRIBUTE** (YC28), **TERM CODE** (202503), and **ACTIVITY DATE** (2026-07-02 09:48:40). A **MODIFY** button is located at the bottom of the sidebar. A left sidebar shows thumbnail images of document pages (Page 1 to Page 6). A top toolbar includes options for **Document**, **Page**, **Scanner**, **Rotate**, **Zoom**, **Annotation**, **Format**, **Actions**, and **Rubber Band OCR**. A search bar and buttons for **EMAIL**, **EXPORT**, and **PRINT** are also present.

Selected document displayed

Document index values

Thumbnail images of document pages

Use the breadcrumb at the top left corner of the AppX window to navigate back to the query results, the search screen or the initial screen. Here, the breadcrumb shows **STUDOCs-YC > New Search > Query Results > {selected student ID}**.

Drag and
drop new
documents

How to index a
document on your
computer or on a
folder accessible
from your
computer

Drag and drop a new document

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DJH72

▶ B-R-TREQ_AT

▶ B-R-TREQ_DI

▶ B-R-TREQ_DR

▶ B-R-TREQ_FS

▶ B-R-TREQ_GB

▶ B-R-TREQ_GS

▶ B-R-TREQ_LW

▶ B-R-TREQ_MD

▶ B-R-TREQ_MG

▶ B-R-TREQ_MU

▶ B-R-TREQ_NR

▶ B-R-TREQ_PA

▶ B-R-TREQ_PH

▶ B-S-ADMN

▶ B-S-CRSE

▶ B-S-DGRE

▶ B-S-ID

▶ B-S-SECT

▶ DININGAP

▶ DININGCASH

▶ DININGCATERING

▶ DININGCREDITCARD

▶ DININGHR

▶ DININGJOBS

▶ GRADREG

▶ OISS

▶ SAR

▶ SLD

▶ STUOCS-AC

▶ STUOCS-FS

▶ STUOCS-LW

▶ STUOCS-NR

▶ STUOCS-PH

▶ STUOCS-YC

▶ TRNFASRO

Welcome to AppEnhancer Web Access

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Click on the name of the application to get started

Drag and drop a new document

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CS574 ⓘ ↗

Applications

▶ B-G-ID

▶ B-R-ID

▶ B-R-TREQ

▶ B-R-TREQ_AC

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▶ B-S-ADMN

▶ B-S-CRSE

▶ B-S-DGRE

▶ B-S-ID

▶ B-S-SECT

▶ DININGAP

▶ DININGCASH

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▶ DININGCREDITCARD

▶ DININGHR

▶ DININGJOBS

▶ GRADREG

▶ OISS

▶ SAR

▶ SLD

▶ STUDOCS-AC

GRADREG - GRADREG

NEW QUERY

NEW DOCUMENT

NEW BATCH

MANAGE BATCHES

+

New Document

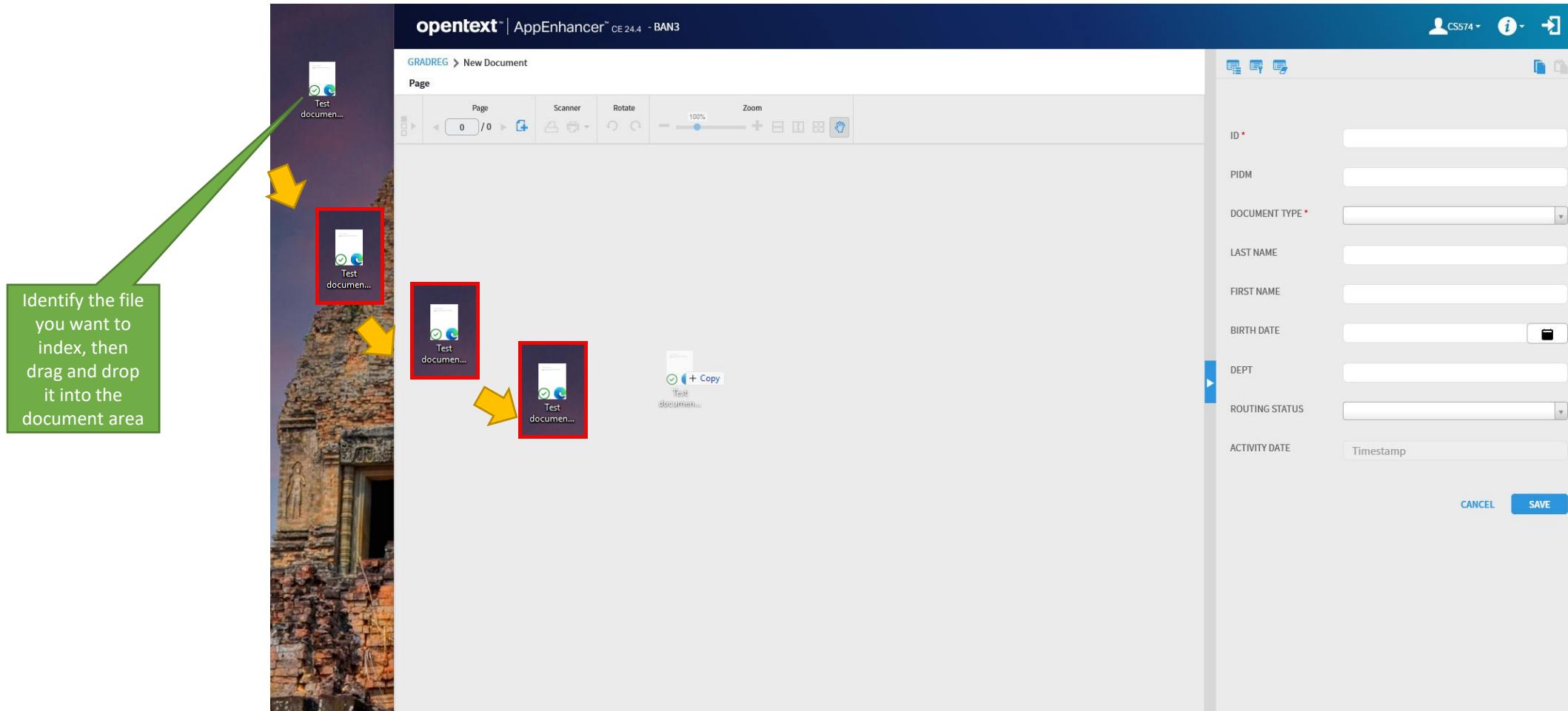
New Batch

Manage Batches

Click here to drag in a new document...

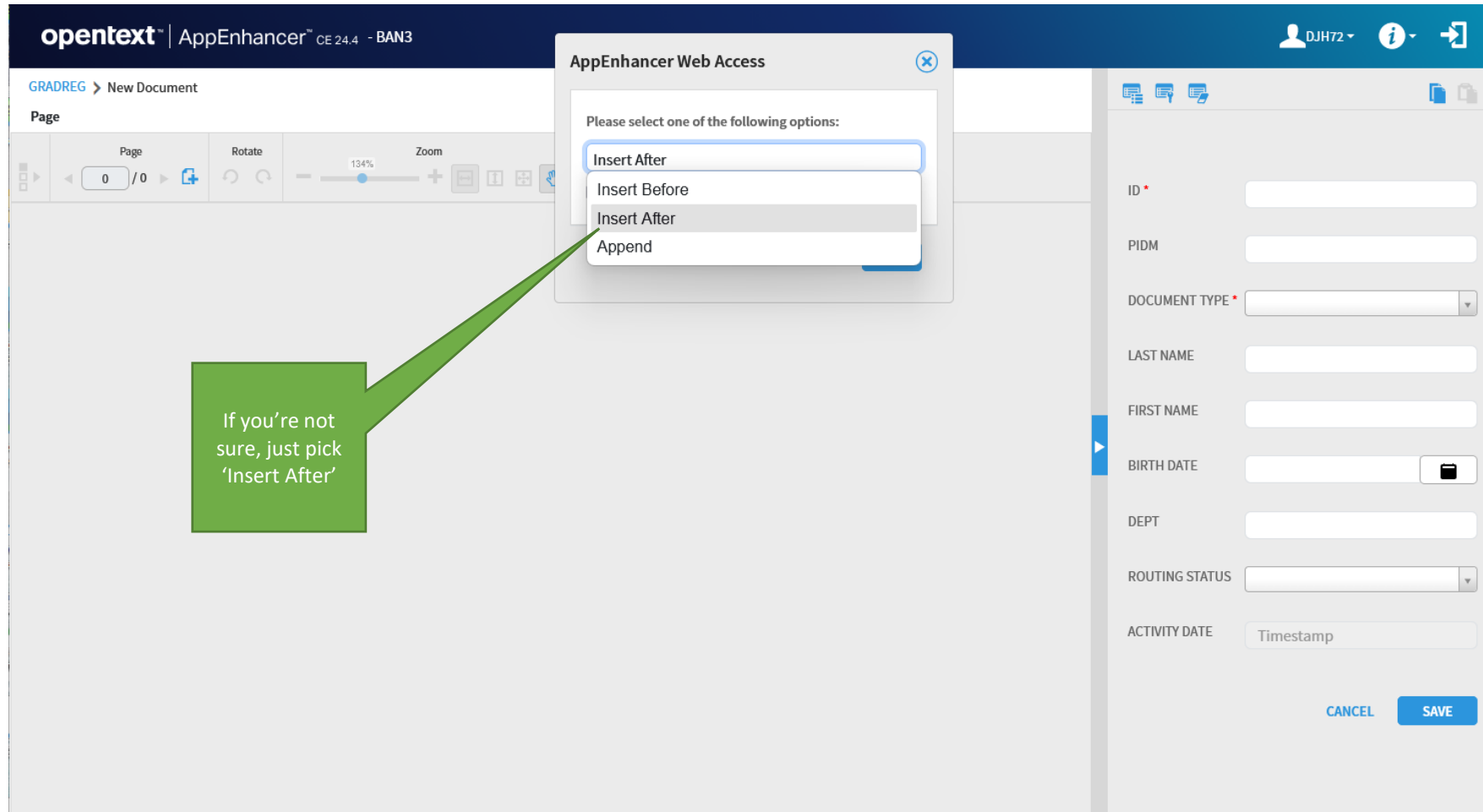
...OR click on the plus sign and then click on 'New Document'

Drag and drop a new document



In this example, we shrank the browser window so that we could see a PDF file that was on the desktop. We then clicked on the PDF file and dragged it into the document viewing area. Once the icon is dragged into the document viewing area, it will acquire the “+Copy” tag. When we drop the document, the application reads the file and renders it as a viewable image in the document viewing area.

Drag and drop a new document



Drag and drop a new document

opentext | AppEnhancer™ CE 24.4 - BAN3

GRADREG > New Document

Page

1 / 3

Rotate

Zoom 110%

Annotation

Page 1

Page 2

Page 3

Yale GRADUATE SCHOOL OF ARTS AND SCIENCES

Registration in Absentia Request

Ph.D. students whose program of study requires full-time dissertation research, field work, or study at another academic institution outside of Connecticut may request to be registered in absentia. Forms for requesting registration should be filed with your DGS at least one month before the beginning of the term in which you expect to be away from Connecticut.

If you have any questions, please contact records.uro@yale.edu.

1. Student Information Review

a. The student information is populated using information listed within the Student Information System (SIS).

b. If your student information is incorrect, please update your record prior to submitting this form by visiting [Yale Hub](#). If your adviser information is incorrect, contact your registrar to have your information updated.

First Name

E

Last Name

Student ID Number

94

Street Line 1

6

Street Line 2

City

State or Province

ZIP or Postal Code

7

Country

United States of America

Yale Email Address

@yale.edu

Phone Number

Cohort Year

GST7.0

Degree

Doctor of Philosophy

Department Name (1)

ID *

PIDM

DOCUMENT TYPE *

LAST NAME

FIRST NAME

BIRTH DATE

DEPT

ROUTING STATUS

ACTIVITY DATE

Timestamp

CANCEL

SAVE

Click here to display thumbnails of a multi-page document or a batch

Document displays here

Registration in Absentia Request

Reviewed September 2026

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Drag and drop a new document

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GRADREG > New Document

Page

Page

1 / 3

Rotate

Zoom

110%

Annotation

Yale GRADUATE SCHOOL OF ARTS AND SCIENCES

Registration in Absentia Request

Ph.D. students whose program of study requires full-time dissertation research, field work, or study at another academic institution outside of Connecticut may request to be registered in absentia. Forms for requesting registration should be filed with your DGS at least one month before the beginning of the term in which you expect to be away from Connecticut.

If you have any questions, please contact records.uro@yale.edu.

1. Student Information Review

a. The student information is populated using information listed within the Student Information System (SIS).
b. If your student information is incorrect, please update your record prior to submitting this form by visiting [Yale Hub](#). If your adviser information is incorrect, contact your registrar to have your information updated.

First Name E	Last Name 	Student ID Number 9
Street Line 1 6	Street Line 2 	
City 	State or Province GA	ZIP or Postal Code
Country United States of America		
Yale Email Address @yale.edu	Phone Number 	Cohort Year GST7.0
Degree 	Department Name (1) 	

ID *

PIDM

DOCUMENT TYPE *

LAST NAME

FIRST NAME

BIRTH DATE

DEPT

ROUTING STATUS

ACTIVITY DATE

CANCEL

SAVE

Enter the student ID and press Tab to auto-fill info from Banner

You will need to manually populate other required fields

The index fields ID and DOCUMENT TYPE have a small red asterisk at their top right corners to show that they are **required** fields.

In this view, the field ROUTING STATUS is not a required field and does not have the red asterisk.

Drag and drop a new document - Document already exists!

Document Index is Duplicated

⚠ The same index has been found in an existing document. Select APPEND to append to the existing document. Select CREATE to create a new document. Select CANCEL to modify the index.

CANCEL CREATE APPEND

APPEND will add this document after the last page of the existing document.

CREATE will attempt to create a new document with the same indexes (but will fail with Unique Key Violation error)

Yale GRADUATE SCHOOL OF ARTS AND SCIENCES

Registration Absentia Request

Ph.D. students whose program of study is in the Graduate School of Arts and Sciences may request to be registered outside of the beginning of the term in which you are currently registered. You must request this at least one month before the beginning of the term in which you wish to be registered.

If you have any questions, please contact your advisor or the Registrar's Office.

1. Student Information Review

a. The student information is populated using information listed within the Student Information System (SIS).
b. If your student information is incorrect, please update your record prior to submitting this form by visiting [Yale Hub](#). If your adviser information is incorrect, contact your registrar to have your information updated.

First Name: E Last Name: Student ID Number: [Redacted]

Street Line 1: 6 Street Line 2: [Redacted]

City: [Redacted] State or Province: [Redacted] ZIP or Postal Code: [Redacted]

Country: United States of America

Yale Email Address: [Redacted]@yale.edu Phone Number: [Redacted] Cohort Year: GST7.0

Degree: [Redacted] Department Name (1): [Redacted]

Page 1 / 3

Page 2

Page 3

ID: 9

PIDM: 2

DOCUMENT TYPE: REGISTRATION

LAST NAME: [Redacted]

FIRST NAME: E

BIRTH DATE: 08-J

DEPT: [Redacted]

ROUTING STATUS: [Redacted]

ACTIVITY DATE: Timestamp

CANCEL SAVE

You would usually APPEND the document when you get this message. This means that there will be a single document in AppX for a given set of index values, but that document can have many pages from multiple original documents and can be added to over time.

If you try to CREATE a document with the index values on screen, it will then display the error “**Unable to save the document index. A unique key violation has occurred.**” – this error is telling you that there is another document with the same index values, but this time it’s the underlying database that is throwing the error. ‘Unique Key Violation’ comes from the Oracle database which stores the index values for the document.

Drag and drop a new document

opentext™ | AppEnhancer™ CE 24.4 - BAN3

D 2

i

GRADREG > 918800164

Document Page

Text Search

EMAILEXPORTPRINT

Page

Rotate

Zoom

Annotation

Format

3 / 5

110%

More

1. Student Information Review

a. The student information is populated using information listed within the Student Information System (SIS).
b. If your student information is incorrect, please update your record prior to submitting this form by visiting [Yale Hub](#). If your adviser information is incorrect, contact your registrar to have your information updated.

First NameLast NameStudent ID Number

E9

Street Line 1Street Line 2

6

CityState or ProvinceZIP or Postal Code

CountryUnited States of America

Yale Email AddressPhone NumberCohort Year

@yale.eduGST7.0

DegreeDepartment Name (1)

ID *9

PIDM2

DOCUMENT TYPE *REGISTRATION

LAST NAME

FIRST NAMEE

BIRTH DATE08-J

DEPT

ROUTING STATUS

ACTIVITY DATE2023-04-28 12:23:00

Clicking SAVE saves the index values with the document, button then changes to MODIFY

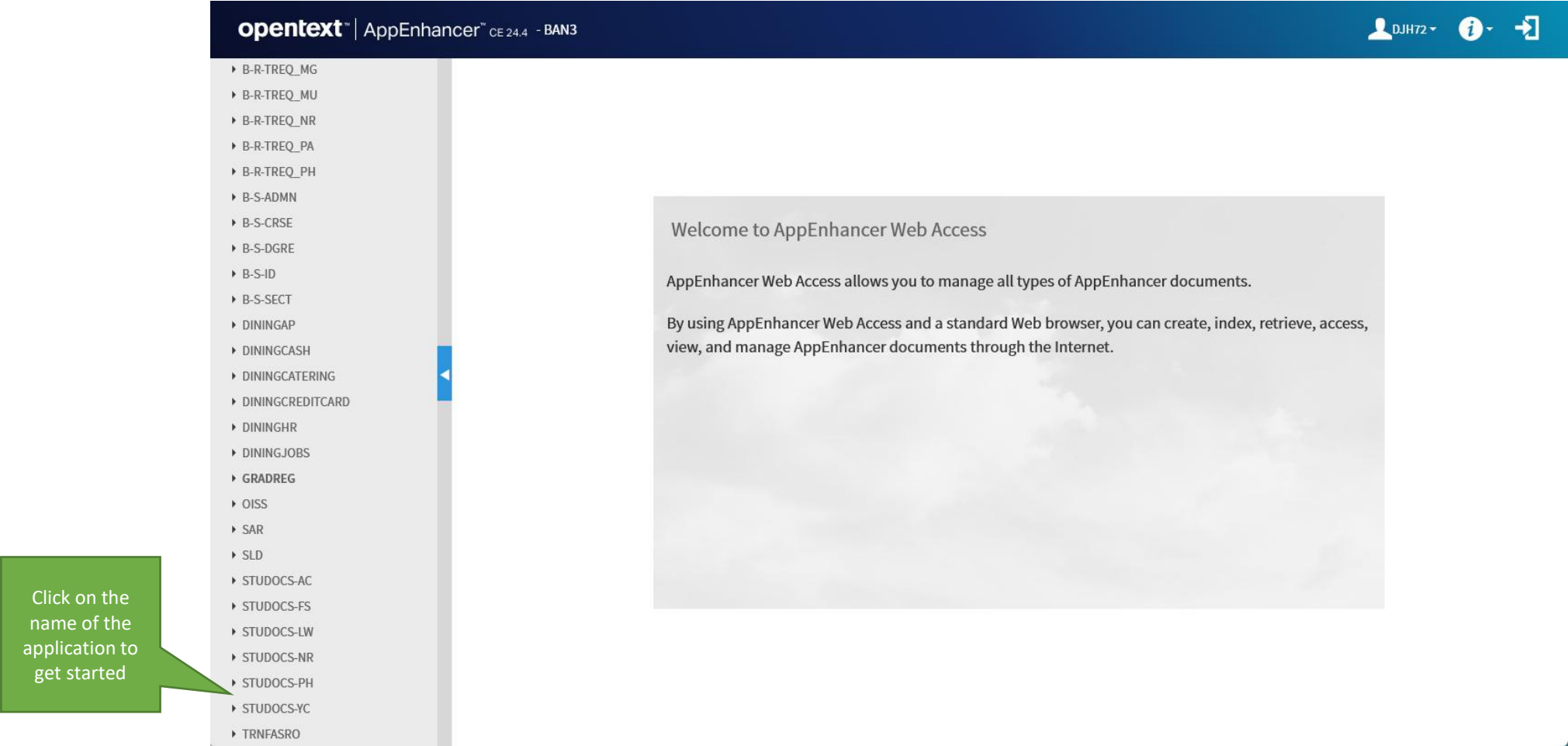
MODIFY

In the previous slide, this document had 3 pages, after appending a new document to the original, it now has 5 pages.

Create document batch

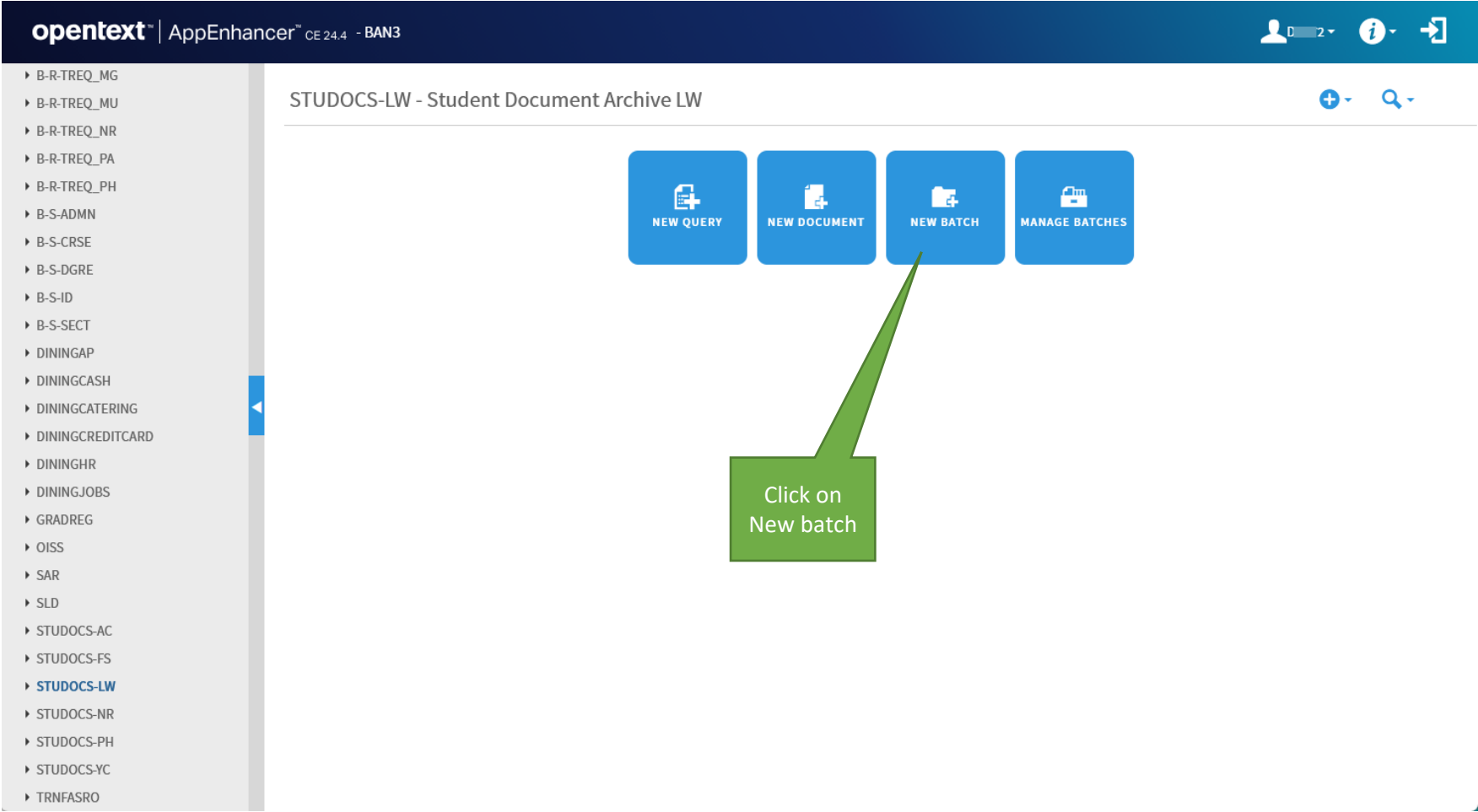
How to upload a group of documents into a batch that is saved in AppX.

Create batch manually



Click once on the name of the application to begin creating a batch.

Create batch manually



Create batch manually

opentext | AppEnhancer™ CE 24.4 - BAN3

STUDOCs-LW - Student D

Application*

STUDOCs-LW

Name*

myRockingTestBatch

Batch Security*

☒ Public

☐ Private

☐ Group

Description

Demonstrating the creation of a document batch that I can index later.

Batch security - new feature, default to Public if unsure.

CANCEL CONTINUE

Enter a name for this batch

(Optional) Enter a description of this batch

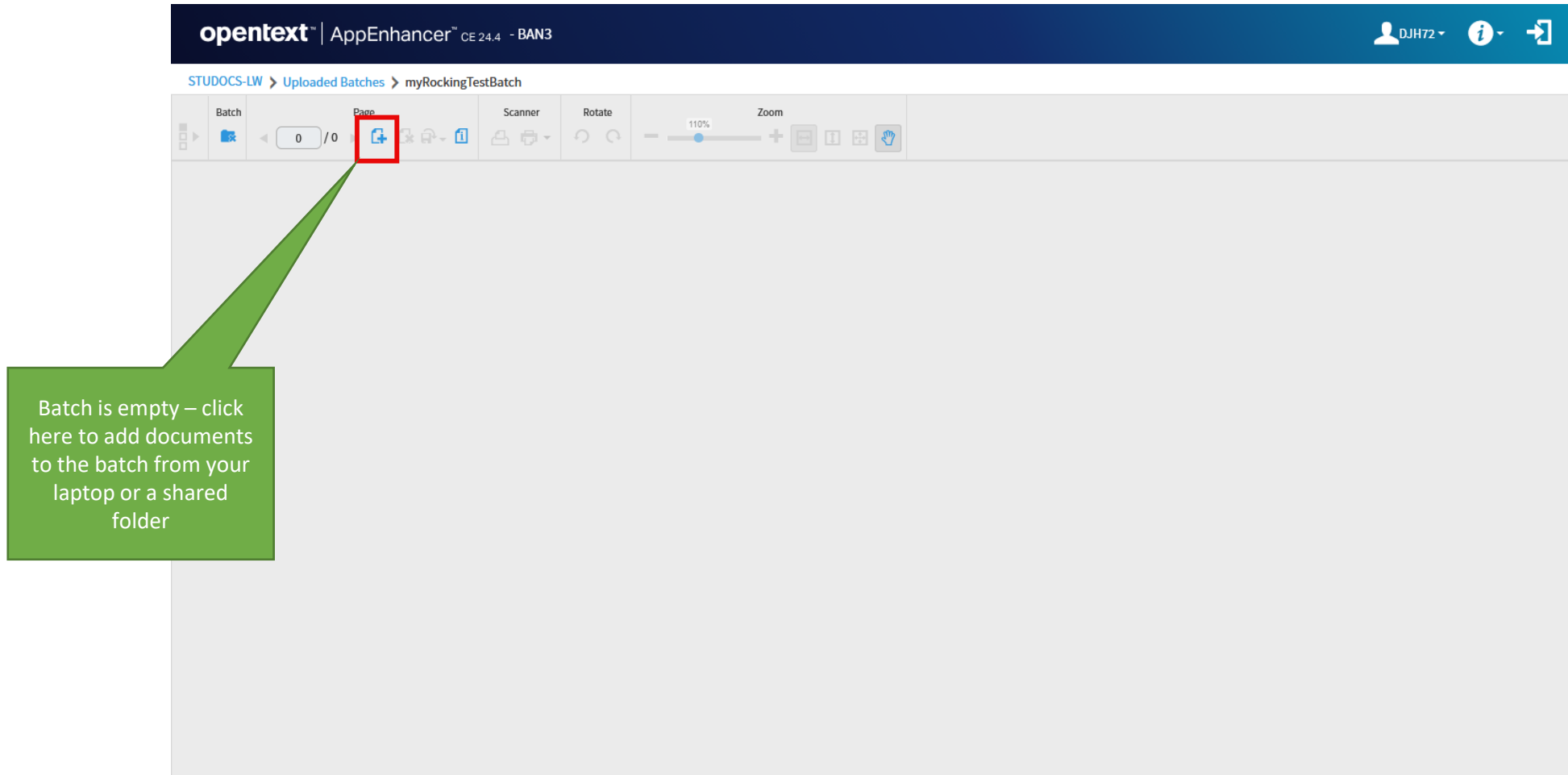
Click continue

The name of the application (repository) will fill in automatically. The user will need to add a name for the batch and a description (if they choose).

For Batch Security, you should mark it as **Public**. Permissions on the specific document repository would only allow approved document indexers to view and index the batch of file.

Click CONTINUE to go to the next step...

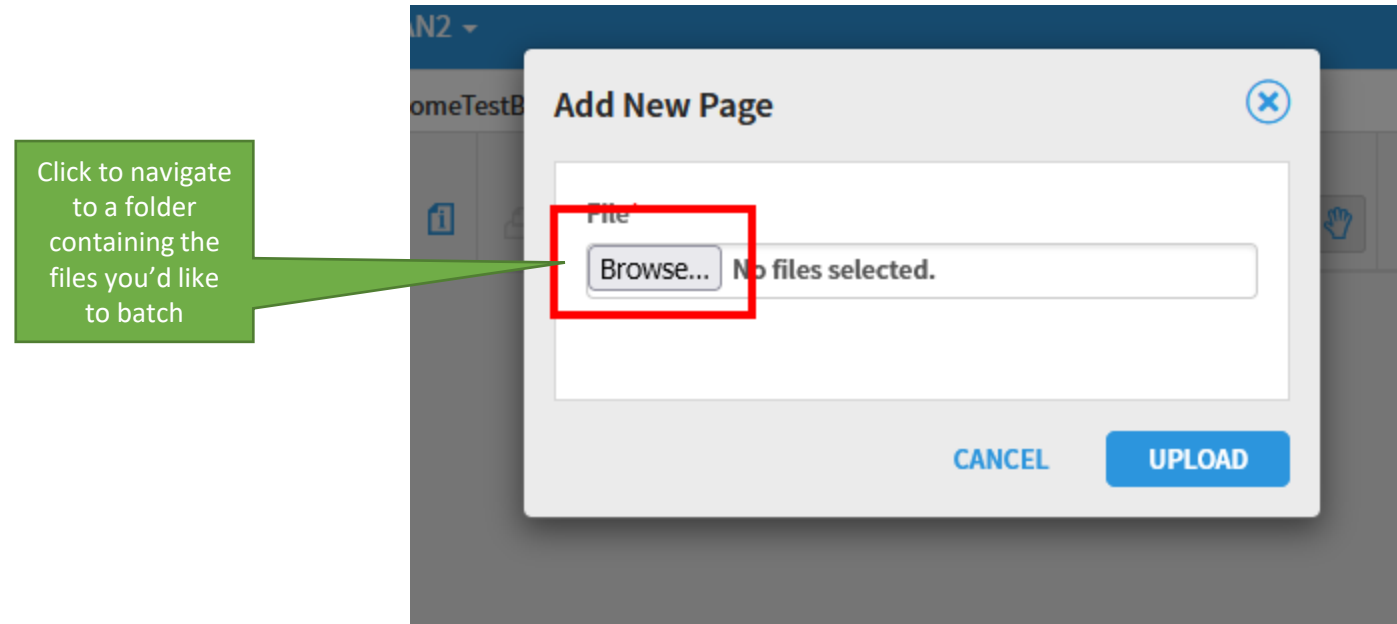
Create batch manually



You have created an empty batch at this point, so now it's time to add files to it.

To start click on the icon of a page with a plus sign on it.

Create batch manually



In the dialog window that appears, click the button to browse to a folder that has the files you want to add.

Create batch manually

opentext | AppEnhancer CE 24.4 - BAN3

Add New Page

STUDOCs-LW > Uploaded Batches > myDockingTestBatch

Batch 0 / 0

File Upload

Organize New folder

Downloads Documents Pictures App Xtender Documents git-wc

Windows (C:) > AdmApps (N:) > appxprod- (Q:) > appxstaging- (R:)

Name Date modified Type Size

PDF _202503_11713_OUTSIDELAW_202...	8/26/2025 11:51 AM	Microsoft Edge P...	444 KB
PDF _Spring_WriteReqInfo_20260212	2/14/2026 5:50 PM	Microsoft Edge P...	169 KB
PDF _202501_AUDIT-REQUEST_20250115	1/20/2025 9:50 AM	Microsoft Edge P...	269 KB
PDF _Spring_WriteReqInfo_20260209	2/10/2026 11:50 AM	Microsoft Edge P...	187 KB
PDF _BarRelease_20250213	2/18/2025 11:50 AM	Microsoft Edge P...	206 KB
PDF _Spring_SPVSD_RSRCH_20250113	1/15/2025 5:50 PM	Microsoft Edge P...	231 KB
PDF _202503_AUDIT-REQUEST_20250905	9/5/2025 5:50 PM	Microsoft Edge P...	197 KB
PDF _BarRelease_20250612	6/12/2025 5:50 PM	Microsoft Edge P...	167 KB
PDF _BarRelease_20260614	6/15/2026 9:50 AM	Microsoft Edge P...	166 KB
PDF _PRMSSN_CHG_GRD_STS_20260123	1/23/2026 5:50 PM	Microsoft Edge P...	124 KB
PDF _202501_22010_LATEDROP_20250129	2/3/2025 1:50 PM	Microsoft Edge P...	222 KB
PDF _202501_26875_ADD_20250129	1/30/2025 3:50 PM	Microsoft Edge P...	218 KB
PDF _202601_22899_OUTSIDELAW_20260...	1/15/2026 9:51 AM	Microsoft Edge P...	255 KB
PDF _202601_AUDIT-REQUEST_20260202	2/3/2026 7:50 AM	Microsoft Edge P...	202 KB
PDF _202601_21915_ADD_20260129	2/2/2026 11:50 AM	Microsoft Edge P...	168 KB
PDF _202601_21915_LATEDROP_20260310	3/19/2026 9:50 AM	Microsoft Edge P...	176 KB
PDF _202601_21915_LATEDROP_20260310	3/19/2026 9:50 AM	Microsoft Edge P...	176 KB

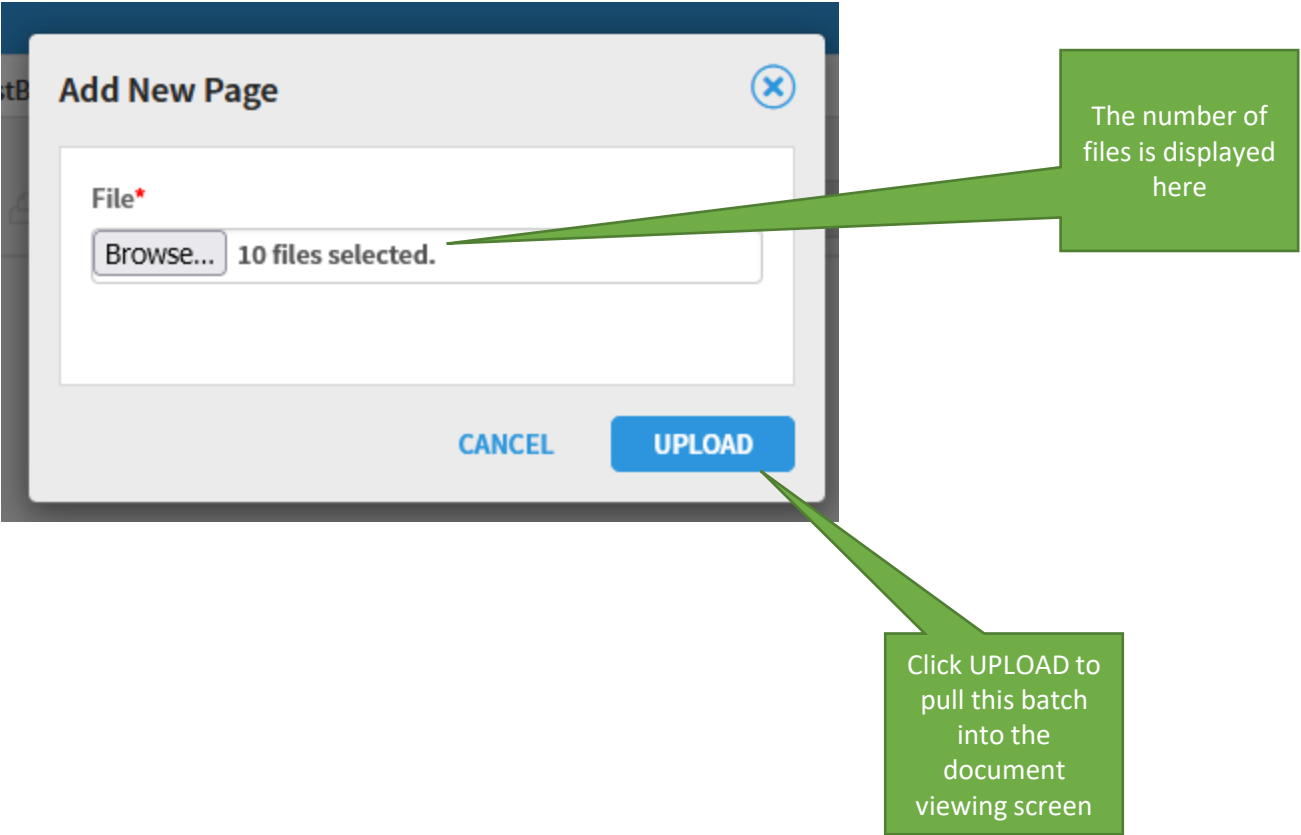
File name: "_202601_AUDIT-REQUEST_20260202" "_Spring_WriteReqInfo_20260212" "_202501_AUDIT-REQUEST_20250115" "All Files"

Open Cancel

Hold down Ctrl key and click individual files, Shift to grab a set of consecutive files

Then click 'Open' to bring these back to AppX

Create batch manually



Create batch manually

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STUDOCs-LW > Uploaded Batches > myRockingTestBatch

Batch

Page

Scanner

Rotate

Zoom

Annotation

Format

More

16 / 16

100%

Page 12

Page 13

Page 14

Page 15

Page 16

Comments to Student

Registrar Notes:

Registrar Processor Email:

Added to Canvas?

...

...

...

...

AEG

02/03/2026, 6:34 AM

Yes

The application will load the batch into the Document Viewing screen and display the last file in the batch

Click the breadcrumb to look at all uploaded batches or to back out to start screen

Reviewed September 2026

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Index an existing batch

How to index a
group of
documents
previously
uploaded to the
AppX application as
a batch

Index existing batch

Click on the name of the application to get started

opentext™ | AppEnhancer™ CE 24.4 - BAN2

DJH72 ⓘ ↗

▶ B-R-TREQ_NR

▶ B-R-TREQ_PA

▶ B-R-TREQ_PH

▶ B-S-ADMN

▶ B-S-CRSE

▶ B-S-DGRE

▶ B-S-ID

▶ B-S-SECT

▶ DININGAP

▶ DININGCASH

▶ DININGCATERING

▶ DININGCREDITCARD

▶ DININGHR

▶ DININGJOBS

▶ GRADREG

▶ OISS

▶ SAR

▶ SLD

▶ STUDOCS-AC

▶ STUDOCS-FS

▶ STUDOCS-LW

▶ STUDOCS-NR

▶ STUDOCS-PH

▶ STUDOCS-YC

▶ TRNFASRO

SAR - STUDENT ACCOUNTS RECEIVABLE

NEW QUERY

NEW DOCUMENT

NEW BATCH

MANAGE BATCHES

...OR click on the plus sign and then click on 'Manage Batches'

Click here to view existing batches...

Reviewed September 2026

29

Index existing batch

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Manage Batches

SAR > Uploaded Batches

☐	Name	Description	Create Time	Created By	Owner	Pages	State
☐	SAR-W9_batch	Test batch for SAR applic ...	2026-09-14 09:14:05	D		20	Idle
☐		- 7/28/2026 8:53:02 AM	2026-07-28 08:53:02	C		1	Idle
☐		- 7/27/2026 12:08:01 PM	2026-07-27 12:08:01	C		1	Idle
☐		- 7/14/2026 2:19:46 PM	2026-07-14 14:19:46	T		1	Idle
☐		- 7/12/2026 8:21:33 PM	2026-07-12 20:21:33	C		3	Idle
☐		- 7/9/2026 2:53:21 PM	2026-07-09 14:53:21	C		2	Idle
☐		- 7/7/2026 6:15:29 PM	2026-07-07 18:15:29	C		2	Idle
☐		- 7/7/2026 2:01:22 PM	2026-07-07 14:01:22	C		1	Idle
☐		- 7/7/2026 12:41:24 PM	2026-07-07 12:41:24	C		8	Idle
☐		- 7/6/2026 9:26:33 PM	2026-07-06 21:26:33	C		1	Idle
☐		- 6/11/2026 10:43:48 PM	2026-06-11 22:43:48	Ci		2	Idle

Batches 1 - 175 of 175

◀ Previous | 1 | Next ▶ Items per page: 500

Click on the blue triangle for options on what you can do with a batch.

First option (Index) is to index the batch in a Document Viewing window

Second option (Import) is to open the batch in a Document Viewing window and scan more documents into it

Third option (Edit) is to change the name of the batch

Fourth option (Change Owner) is to change who has access to this batch

Index existing batch

The screenshot shows the OpenText AppEnhancer interface. The top bar displays 'opentext | AppEnhancer CE 24.4 - BAN2' and a user profile 'DJHT2'. The breadcrumb trail is 'SAR > Uploaded Batches > SAR-W9_batch'. The interface is divided into three main sections: a left sidebar, a central document view, and a right-hand form.

Left Sidebar: A vertical list of document thumbnails labeled 'Page 1' through 'Page 5'. A green callout bubble points to this area with the text: 'If enabled, document thumbnails will appear on the left'.

Central Document View: Displays the first page of a document titled 'Request for Student's Taxpayer Identification Number (Substitute Form W-9S)' from Yale. The document includes sections for 'Instructions', 'Part I', 'Part II', 'Part III', 'Penalties', and 'Privacy Act Notice'. At the bottom, there are input fields for 'Student First Name', 'Student Last Name', and 'Student ID'. A green callout bubble points to the 'Student ID' field with the text: 'First page of batch will display first'.

Right-hand Form: An 'Index pane' containing several input fields for document metadata. A green callout bubble points to this pane with the text: 'Index pane'. The fields are: 'ID', 'PIDM', 'DOCUMENT TYPE' (dropdown), 'LAST NAME', 'FIRST NAME', 'SSN', 'BIRTH DATE' (calendar icon), 'AID YEAR' (dropdown), 'ROUTING STATUS' (dropdown), 'ACTIVITY DATE' (set to 'Timestamp'), and 'EFFECTIVE DATE' (calendar icon). At the bottom of the form are 'CANCEL' and 'SAVE' buttons.

Locate the student ID for the first page of this batch, enter that in the **ID** field and hit TAB.

Index existing batch

The screenshot displays the AppEnhancer interface. At the top, the header shows 'opentext | AppEnhancer CE 24.4 - BAN2'. Below the header, the breadcrumb trail indicates 'SAR > Uploaded Batches > SAR-W9_batch'. The main area is divided into two panes. The left pane shows a document viewer with a sidebar containing thumbnails for 'Page 1' through 'Page 5'. The right pane displays a form titled 'Request for Student's Taxpayer Identification Number (Substitute Form W-9S)'. The form includes sections for 'Instructions', 'Part I', 'Part II', 'Part III', 'Penalties', and 'Privacy Act Notice'. At the bottom of the form, there are input fields for 'Student First Name', 'Student Last Name', and 'Student ID'. The 'Student ID' field is populated with '93'. To the right of the document viewer, there is a metadata form with fields for 'ID', 'PIDM', 'DOCUMENT TYPE', 'LAST NAME', 'FIRST NAME', 'SSN', 'BIRTH DATE', 'AID YEAR', 'ROUTING STATUS', 'ACTIVITY DATE', and 'EFFECTIVE DATE'. The 'ID' field is populated with '93'. A green callout bubble points to the 'ID' field with the text 'Entering ID and hitting TAB populates basic info'. At the bottom right of the metadata form, there are 'CANCEL' and 'SAVE' buttons.

opentext | AppEnhancer CE 24.4 - BAN2

SAR > Uploaded Batches > SAR-W9_batch

Batch Page Scanner Rotate Zoom Annotation

1 / 20

Page 1

Page 2

Page 3

Page 4

Page 5

Yale

Request for Student's Taxpayer Identification Number
(Substitute Form W-9S)

Instructions

Purpose.

Yale University must get your correct identifying number to file Form 1099-T, Tuition Statement, with the IRS and to furnish a statement to you. This will be your Social Security number (SSN) or, if you are not eligible to obtain an SSN, your individual taxpayer identification number (ITIN). Form 1099-T contains information about qualified tuition and related expenses to help determine whether you, or the person who can claim you as a dependent, may take either the tuition and fees deduction or claim an education credit to reduce Federal income tax. For more information, see IRS Pub. 970, Tax Benefits for Higher Education.

Part I.

Please verify your name and mailing address. If you need to update your MAILING ADDRESS, you must do so in your SIS account.

Taxpayer identification number. Enter your SSN or ITIN. If you do not have an SSN or ITIN, and are applying for one, fill out and submit this form when you receive it.

Part II.

If providing a SSN or ITIN, check the box and sign your name to confirm the information provided. Yale University cannot change your records without your signature.

Part III.

Please fill out this part only if you are unwilling or unable to provide a taxpayer identification number. Check either the first or second box and sign the statement. By law, Yale University must ask you at least once a year for your taxpayer identification number in order to meet its obligation to file Form 1099-T.

Penalties

Failure to furnish correct SSN. If you fail to furnish your correct SSN or ITIN to Yale University, the IRS may impose a penalty of \$50 unless your failure is due to reasonable cause and not to willful neglect.

Misuse of SSNs. If Yale University discloses or uses your SSN in violation of Federal law, Yale University may be subject to civil and criminal penalties.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to give your correct SSN or ITIN to persons who must file information returns with the IRS to report certain information. The IRS uses the numbers for identification purposes and to help verify the accuracy of your tax return. The IRS may also provide this information to the Department of Justice for civil and criminal litigation and to cities and states to carry out their tax laws.

PART I

Student First Name Student Last Name

Student ID

ID

PIDM

DOCUMENT TYPE

LAST NAME

FIRST NAME

SSN

BIRTH DATE

AID YEAR

ROUTING STATUS

ACTIVITY DATE

EFFECTIVE DATE

CANCEL SAVE

Entering ID and hitting TAB populates basic info

When you enter the Student ID in the 'ID' field and hit tab, the application will retrieve some standard student information from a Key Reference table that is populated by Banner.

Index existing batch

openText | AppEnhancer CE 24.4 -BAN2

SAR > Uploaded Batches > SAR-W9_batch

Batch Page Scanner Rotate Zoom Annotation

1 / 20

Page 1

Page 2

Page 3

Page 4

Page 5

Yale

Request for Student's Taxpayer Identification Number
(Substitute Form W-9S)

Instructions

Purpose.

Yale University must get your correct identifying number to file Form 1099-T, Tuition Statement, with the IRS and to furnish a statement to you. This will be your Social Security number (SSN) or, if you are not eligible to obtain an SSN, your individual taxpayer identification number (ITIN). Form 1098-T contains information about qualified tuition and related expenses to help determine whether you, or the person who can claim you as a dependent, may take either the tuition and fees deduction or claim an education credit to reduce Federal income tax. For more information, see IRS Pub. 970, Tax Benefits for Higher Education.

Part I.

Please verify your name and mailing address. If you need to update your MAILING ADDRESS, you must do so in your SIS account.

Taxpayer identification number. Enter your SSN or ITIN. If you do not have an SSN or ITIN, and are applying for one, fill out and submit this form when you receive it.

Part II.

If providing a SSN or ITIN, check the box and sign your name to confirm the information provided. Yale University cannot change your records without your signature.

Part III.

Please fill out this part only if you are unwilling or unable to provide a taxpayer identification number. Check either the first or second box and sign the statement. By law, Yale University must ask you at least once a year for your taxpayer identification number in order to meet its obligation to file Form 1098-T.

Penalties

Failure to furnish correct SSN. If you fail to furnish your correct SSN or ITIN to Yale University, the IRS may impose a penalty of \$50 unless your failure is due to reasonable cause and not to willful neglect.

Misuse of SSNs. If Yale University discloses or uses your SSN in violation of Federal law, Yale University may be subject to civil and criminal penalties.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to give your correct SSN or ITIN to persons who must file information returns with the IRS to report certain information. The IRS uses the numbers for identification purposes and to help verify the accuracy of your tax return. The IRS may also provide this information to the Department of Justice for civil and criminal litigation and to cities and states to carry out their tax laws.

PART I

Student First Name Student Last Name

Student ID

ID

PIDM

DOCUMENT TYPE

LAST NAME

FIRST NAME

SSN

BIRTH DATE

AID YEAR

ROUTING STATUS

ACTIVITY DATE

EFFECTIVE DATE

CANCEL SAVE

Enter additional required info

Click save

Then select the Document Type from the drop-down for **DOCUMENT TYPE**. This field is required.

In the SAR application, other fields like **AID YEAR** and **ROUTING STATUS** are optional and may be added if desired. Most other applications like B-R-TREQ, B-S-ADMIN or STUOCS-YC have similar fields that are optional.

Index existing batch

The screenshot shows the OpenText AppEnhancer interface for a batch of pages. The top navigation bar includes the OpenText logo, 'AppEnhancer CE 24.4 -BAN2', and user icons. The breadcrumb trail is 'SAR > Uploaded Batches > SAR-W9_batch'. The main interface is divided into three sections: a left sidebar with a page index, a central document viewer, and a right sidebar with form fields.

Left Sidebar (Page Index): Shows a list of pages from Page 1 to Page 5. Page 1 is highlighted, and Page 2 is selected. The 'Batch' dropdown menu is open, showing '1 / 19'.

Central Document Viewer: Displays the content of the selected page (Page 2). The text reads: 'If you have questions or require assistance, please email YalePay@yale.edu.' A green callout points to this area, stating: 'Indexed page is removed from the batch. Next page is displayed'.

Right Sidebar (Form Fields): Contains various fields for student information, including ID, PIDM, DOCUMENT TYPE, LAST NAME, FIRST NAME, SSN, BIRTH DATE, AID YEAR, ROUTING STATUS, ACTIVITY DATE, and EFFECTIVE DATE. A 'MODIFY' button is at the bottom.

The system removes the page you just indexed and saved from the view and displays the next page in the batch. The number of pages in the batch is adjusted.

Note: The index information from the student is still displayed in the index pane.

Index existing batch – next page in batch is same student or vendor, same document type

The screenshot shows the opentext AppEnhancer interface. The top header displays 'opentext | AppEnhancer CE 24.4 -BAN2'. The main area shows a batch of pages, with a sidebar on the left listing 'Page 1' through 'Page 5'. A toolbar at the top contains various icons, including a red box highlighting the 'Attach Current Page' icon. A green callout box with a pointer indicates: 'Click 'Attach Current Page' to add the next doc to the same index'. The right sidebar contains a form with fields for ID, PIDM, DOCUMENT TYPE, LAST NAME, FIRST NAME, SSN, BIRTH DATE, AID YEAR, ROUTING STATUS, ACTIVITY DATE, and EFFECTIVE DATE, along with a 'MODIFY' button.

If the next page in the batch is simply another page for the same document / same student, simply click the icon for 'Attach Current Page' and it will add it to the previously indexed document.

Index existing batch – next page in batch is same student or vendor but different doc type

The screenshot displays the OpenText AppEnhancer interface. The top navigation bar shows 'opentext AppEnhancer CE 24.4 - BAN2'. The breadcrumb trail indicates the location: 'SAR > Uploaded Batches > SAR-W9_batch'. The document viewer shows a multi-page document titled 'Request for Student's Taxpayer Identification Number (Substitute Form W-9S)' from Yale. The sidebar on the right contains the following fields:

Field	Value
ID *	93
PIDM	28
DOCUMENT TYPE *	W9S
LAST NAME	
FIRST NAME	
SSN	
BIRTH DATE	
AID YEAR	
ROUTING STATUS	
ACTIVITY DATE *	2026-09-14 10:01:54
EFFECTIVE DATE	

A green callout box points to the 'MODIFY' button at the bottom right of the sidebar, containing the text: 'Click 'Modify' to keep the key index but change other index values like DOCUMENT TYPE or AID YEAR'.

In your batch, you may have many types of documents – parental tax returns, graduation applications, invoices from vendors, Blue Forms, etc.

To index a new document type for the **same student** or vendor, click 'Modify'

Index existing batch – next page in batch is same student or vendor but different doc type

opentext | AppEnhancer CE 24.4 - BAN2

SAR > Uploaded Batches > SAR-W9_batch

Batch

Page

Scanner

Rotate

Zoom

1 / 16

Page 1

Page 2

Page 3

Page 4

Page 5

Yale

Request for Student's Taxpayer Identification Number

(Substitute Form W-9S)

Instructions

Purpose.

Yale University must get your correct identifying number to file Form 1098-T, Tuition Statement, with the IRS and to furnish a statement to you. This will be your Social Security number (SSN) or, if you are not eligible to obtain an SSN, your individual taxpayer identification number (ITIN). Form 1098-T contains information about qualified tuition and related expenses to help determine whether you, or the person who can claim you as a dependent, may take either the tuition and fees deduction or claim an education credit to reduce Federal income tax. For more information, see IRS Pub. 970, Tax Benefits for Higher Education.

Part I.

Please verify your name and mailing address. If you need to update your MAILING ADDRESS, you must do so in your SIS account.

Taxpayer identification number. Enter your SSN or ITIN. If you do not have an SSN or ITIN, and are applying for one, fill out and submit this form when you receive it.

Part II.

If providing a SSN or ITIN, check the box and sign your name to confirm the information provided. Yale University cannot change your records without your signature.

Part III.

Please fill out this part only if you are unwilling or unable to provide a taxpayer identification number. Check either the first or second box and sign the statement. By law, Yale University must ask you at least once a year for your taxpayer identification number in order to meet its obligation to file Form 1098-T.

Penalties

Failure to furnish correct SSN. If you fail to furnish your correct SSN or ITIN to Yale University, the IRS may impose a penalty of \$50 unless your failure is due to reasonable cause and not to willful neglect.

Misuse of SSNs. If Yale University discloses or uses your SSN in violation of Federal law, Yale University may be subject to civil and criminal penalties.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to give your correct SSN or ITIN to persons who must file information returns with the IRS to report certain information. The IRS uses the numbers for identification purposes and to help verify the accuracy of your tax return. The IRS may also provide this information to the Department of Justice for civil and criminal litigation and to cities and states to carry out their tax laws.

PART I

Student First Name

Student Last Name

Student ID

ID

PIDM

DOCUMENT TYPE

LAST NAME

FIRST NAME

SSN

BIRTH DATE

AID YEAR

ROUTING STATUS

ACTIVITY DATE

EFFECTIVE DATE

92

28

SCHOLARSHIP CHECKS

B

J

06

2026-09-14 10:01:54

CANCEL

SAVE

Key index is the same (same student) , but we can change the Document Type

Click 'Save' to index the document and remove it from the batch

Reviewed September 2026

37

Index existing batch – next page is different student or vendor

The screenshot shows the AppEnhancer interface with the following elements:

- Header:** opentext | AppEnhancer CE 24.4 - BAN2
- Navigation:** SAR > Uploaded Batches > SAR-W9_batch
- Toolbar:** Batch, Page (1 / 14), Scanner, Rotate, Zoom (100%), and various document manipulation icons.
- Document Area:** Displays a Yale form titled "Request for Student's Taxpayer Identification Number (Substitute Form W-9S)". The form includes sections for Instructions, Purpose, Part I, Part II, Part III, Penalties, and Privacy Act Notice. At the bottom, there are input fields for Student First Name, Student Last Name, and Student ID (93).
- Right Panel:** Contains form fields for ID (93), PIDM (28), DOCUMENT TYPE (W9S), LAST NAME, FIRST NAME, SSN, BIRTH DATE, AID YEAR, ROUTING STATUS, ACTIVITY DATE (2026-09-14 10:01:54), and EFFECTIVE DATE. A MODIFY button is at the bottom right.
- Callout:** A green box with the text "Click 'New Document'" points to a document icon with a plus sign in the top left corner of the document area.

To switch to a new student (or document type, or term code, etc.) you **must** tell AppXtender that this is a new document. Click the icon that looks like a document with a tiny plus sign on it, under the word 'Batch' in the top left corner of the document area.

Index existing batch – next page is different student or vendor

The screenshot displays the AppEnhancer CE 24.4 - BAN2 interface. The top navigation bar shows the application name and version. The left sidebar contains a list of pages: Page 1, Page 2, Page 3, and Page 4. The central document viewer shows the first page of a form titled "Request for Student's Taxpayer Identification Number (Substitute Form W-9S)" from Yale. The form includes instructions, a purpose statement, and sections for Part I, Part II, and Part III. The right sidebar contains form fields for ID, PIDM, DOCUMENT TYPE, LAST NAME, FIRST NAME, SSN, BIRTH DATE, AID YEAR, and ROUTING STATUS. At the bottom right of the sidebar are "CANCEL" and "SAVE" buttons.

When you tell Appx that this is a new document, it will clear out the index fields. You would want to do this if the document is for a new student (or vendor) and unrelated to the previous document in the batch. You can then enter the ID field and hit TAB to retrieve reference index fields for the next student.

Index existing batch – all remaining pages are the same student, same document type

The screenshot shows the OpenText AppEnhancer CE 24.4 - BAN2 interface. The top navigation bar includes the OpenText logo and the text 'AppEnhancer™ CE 24.4 - BAN2'. The breadcrumb trail indicates the current location: 'SAR > Uploaded Batches > SAR-W9_batch'. The main toolbar contains various icons for document manipulation, including a red box highlighting the 'Attach All Pages' icon. A green callout box with an arrow points to this icon, containing the text: 'Click 'Attach All Pages' to attach remaining pages to the same index'. The right sidebar displays a form for document metadata, including fields for ID (9), PIDM (2), DOCUMENT TYPE (W9S), LAST NAME (R), FIRST NAME (A), SSN, BIRTH DATE (02), AID YEAR, and ROUTING STATUS. The 'SAVE' button is visible at the bottom of the sidebar.

Click 'Attach All Pages' to attach remaining pages to the same index

When all remaining pages in a batch are for the same student and document type, you can click the button that will attach all remaining pages in the batch to the existing document.

Index existing batch – all remaining pages are the same student, same document type

opentext | ApplicationXtender - BAN2

DJH72

SAR > Uploaded Batches > Batch_2018-07-24_01

Batch

Page

1 / 6

Page 1

Page 2

Page 3

Page 4

ApplicationXtender Web Access

⌵

⚠

All pages will be attached. Do you want to proceed?

CANCEL

OK

8. Click Next. The Destination Folder page is displayed.

ApplicationXtender Desktop 7.0 - InstallShield Wizard

EMC

The installation wizard will install the files for ApplicationXtender Desktop 7.0 in the following folder.

Destination Folder
C:\Program Files\TenderSolutions\Content Management\

Change...

Destination Folder: Click Next to install to this folder, or Change to install to a different folder.

< Back Next > Cancel

9. If you want to change the destination folder:
9.1. Click Change.
9.2. Browse to the desired folder.
9.3. Click OK.

10. Click Next. The Setup Type page is displayed.

ApplicationXtender Desktop 7.0 - InstallShield Wizard

EMC

☐ Complete

All program features will be installed. (Requires the most disk space.)

☐ Retrieval

Enables installation of components necessary to retrieve, view, print, and index ApplicationXtender documents

☒ Scanning

Enables installation of components necessary to retrieve, view, print, scan, and index ApplicationXtender documents

☐ Administrator

Enables installation of components necessary to administer the ApplicationXtender system

☐ Custom

Choose which program features you want installed and where they will be installed. Recommended for advanced users.

Setup Types: Choose the setup type that best suits your needs.

< Back Next > Cancel

FIRST NAME

SSN

BIRTH DATE

AID YEAR

ROUTING STATUS

ACTIVITY DATE *

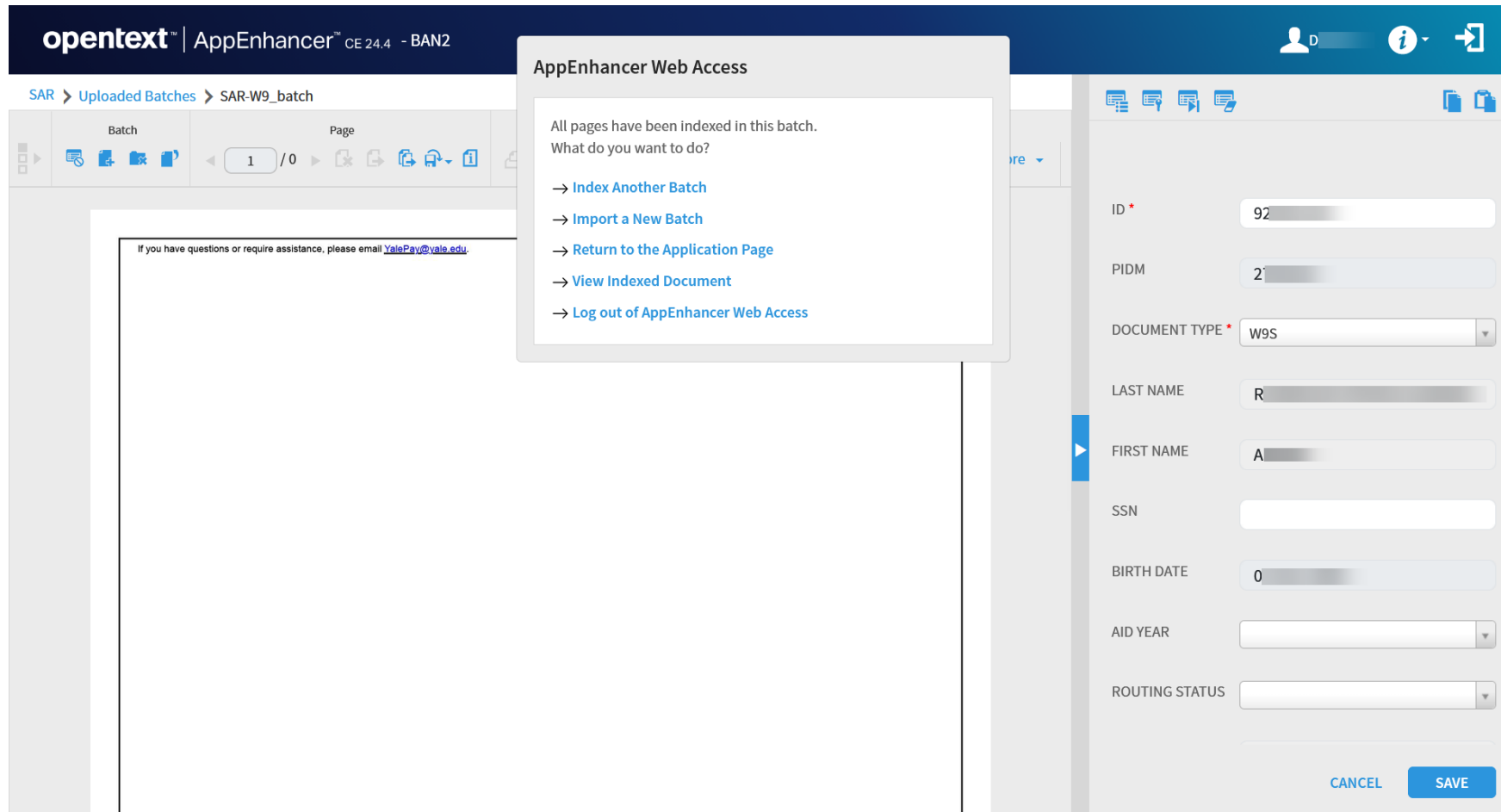
EFFECTIVE DATE

2018-07-26 14:01:39

MODIFY

Click 'OK'

Index existing batch



This screen means that you have indexed all the documents in the batch. Choose one of the options from this dialog box to continue.

If you're done with indexing for the time being, select the option for 'Return to the Application Page'.