

Banner to AppX 16.3

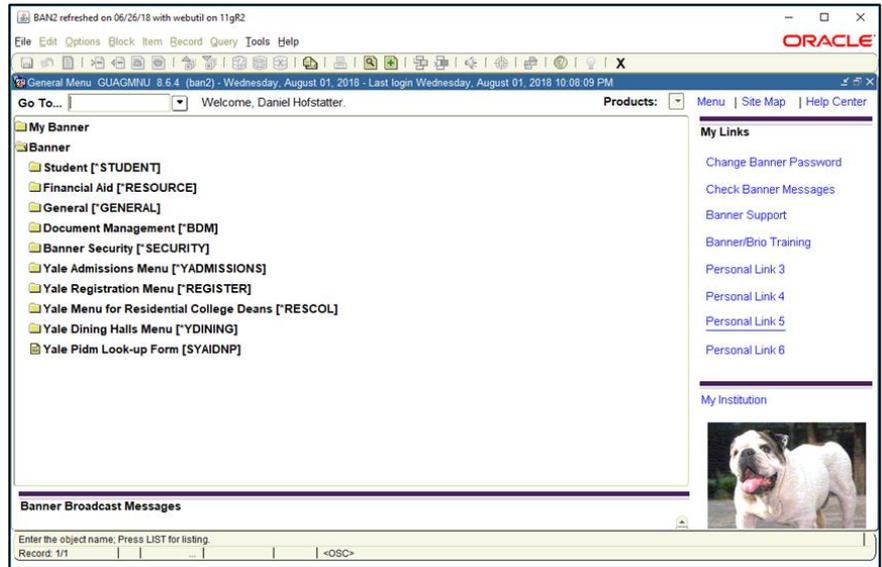
Description: This Quick Guide provides the steps necessary to move between Banner and its integrated system, ApplicationXtender in four different scenarios.

Note: This integration works for the baseline tracking requirements tracking for Financial Aid and for Admissions. There are four scenarios for moving between systems:

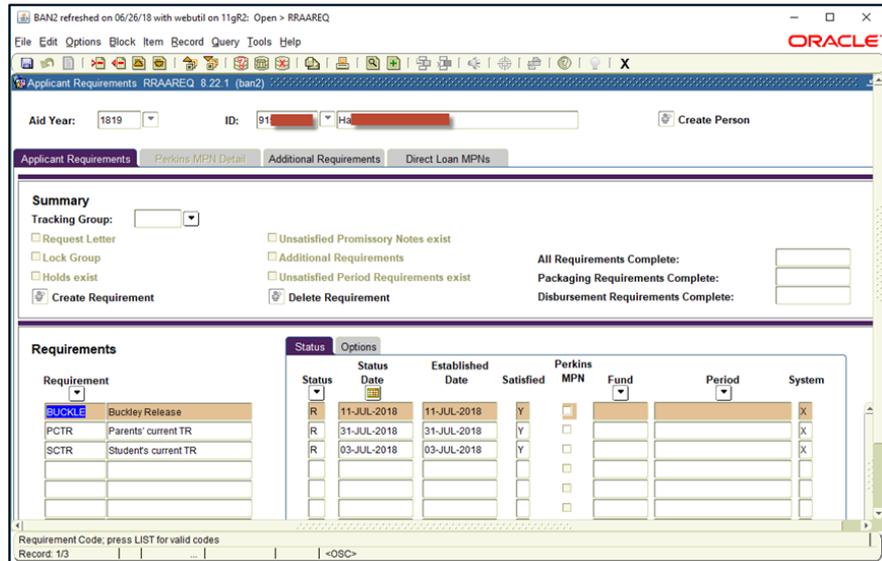
- Scenario #1: Banner 8 Forms to AppX Document Manager 16.3
- Scenario #2: Banner 8 Forms to AppX WebXtender 16.3
- Scenario #3: Banner 9 Admin forms to AppX Document Manager 16.3
- Scenario #4: Banner 9 Admin Forms to AppX WebXtender 16.3

Scenario 1: Banner 8 Forms to AppX Document Manager 16.3

1. Log into Banner 8 Forms.



2. Load Financial Aid tracking requirements for a student.



Banner 8 Forms to AppX Document Manager 16.3 (cont.)

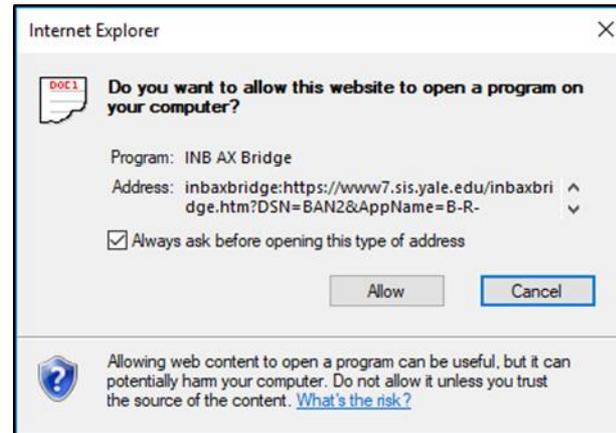
- Select a requirement that has a system indicator of "X" and click on the small magnifying glass icon in the Banner toolbar.

The screenshot shows the Banner 8 Applicant Requirements form. The toolbar at the top contains a magnifying glass icon highlighted with a red box and a yellow arrow. The 'Requirements' table below has a row for 'BUCKLE' highlighted in red, with a yellow arrow pointing to the 'X' in the 'System' column.

Requirement	Status	Status Date	Established Date	Satisfied	Perkins MPN	Fund	Period	System
BUCKLE Buckley Release	R	11-JUL-2018	11-JUL-2018	Y	<input type="checkbox"/>			X
PC1R Parents' current 1R	R	31-JUL-2018	31-JUL-2018	Y	<input type="checkbox"/>			X
SCTR Student's current TR	R	03-JUL-2018	03-JUL-2018	Y	<input type="checkbox"/>			X
					<input type="checkbox"/>			
					<input type="checkbox"/>			

Banner 8 Forms to AppX Document Manager 16.3 (cont.)

4. Click **Allow** upon seeing a pop-up requesting permission to run the INB-AX bridge.



5. The INB-AX bridge program will open the Document Manager application and retrieve the document automatically.

ApplicationXender Document Manager - [BAN2 - B-R-TREQ - 915550403 (Page 1 of 2)]

File Edit View Document Page Scan Annotate Utilities Window Help

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20

BAN2

- B-G-ID - BANNER COMMON
- B-R-ID - BANNER FINANCIAL AID COMMON
- B-R-TREQ - BANNER FINANCIAL AID TRACKING REQ
 - brtreq-SAR
 - QIMAccess
 - B-R-TREQ_AT - BANNER FINANCIAL AID ART
 - B-R-TREQ_DR - BANNER FINANCIAL AID DRAMA
 - B-R-TREQ_LW - BANNER FINANCIAL AID LAW
 - B-R-TREQ_MD - BANNER FINANCIAL AID MED
 - B-R-TREQ_MG - BANNER FINANCIAL AID SOM
 - B-R-TREQ_NR - BANNER FINANCIAL AID NURSING
 - B-R-TREQ_PH - BANNER FINANCIAL AID PUBLIC HEALTH
- B-S-ADMIN - BANNER STUDENT ADMISSIONS
- B-S-CRSE - BANNER STUDENT COURSE / ID
- B-S-DGRE - BANNER STUDENT DEGREE
- B-S-ID - BANNER STUDENT COMMON
- B-S-SECT - BANNER CATALOG / COURSE SECTION
- FININGAP - FINING AP APPLICATION

PCTR

LIKELY - DJH72 / 8/1/2018

Chapter 3

Working With Documents

Using ApplicationXender Web Access, you can perform many of the document-related functions that are available in AppXender Document Manager. For example, you can add new documents, delete existing documents, add pages to documents, and remove pages from documents. You can also index batch documents and use automated indexing functionality to automatically index new documents.

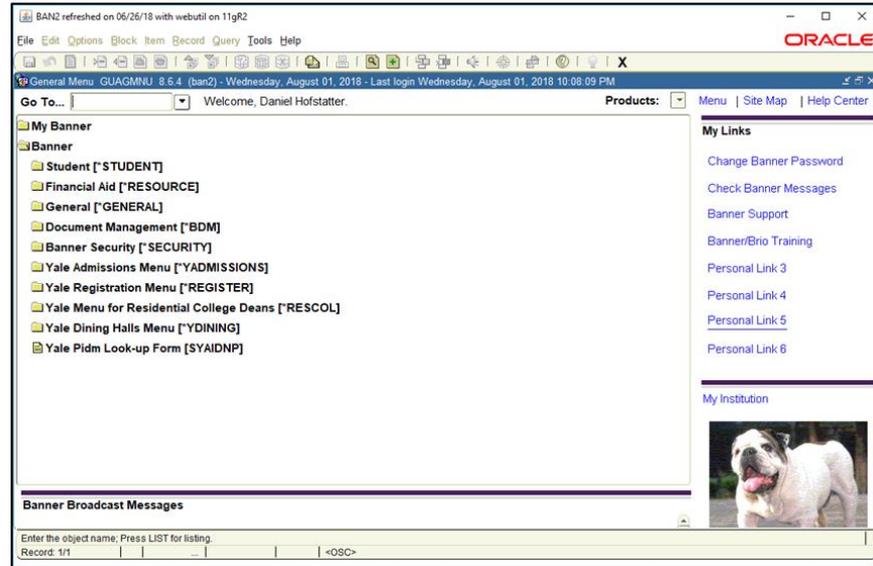
ID	PIDM	DOCUMENT TYPE	LAST NAME
91	15	TRACKING REQUIREMENT	

For Help, press F1

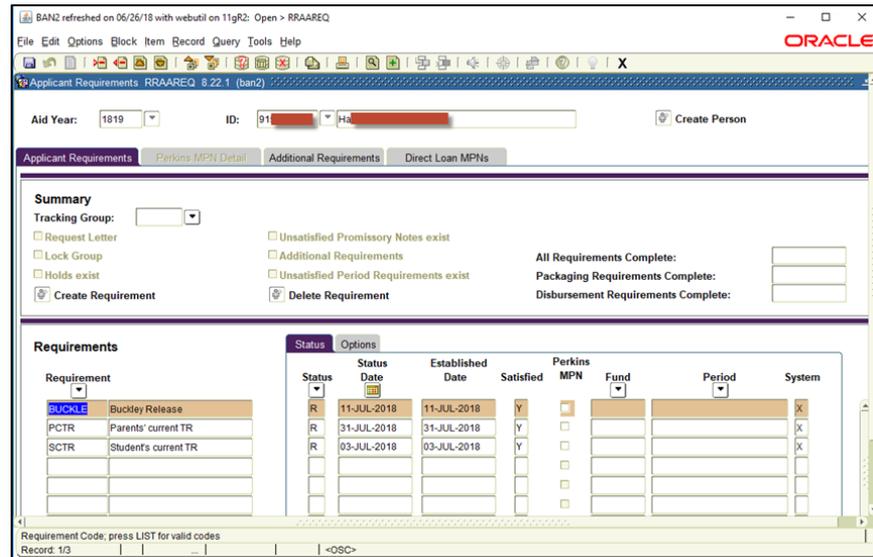
App B-R-TREQ Page 1/2 Ver 1/1

Scenario 2: Banner 8 Forms to AppXtender WebXtender 16.3

1. Log into Banner 8 Forms.



2. Load Financial Aid tracking requirements for a student.



Banner 8 Forms to AppXtender WebXtender 16.3 (Cont.)

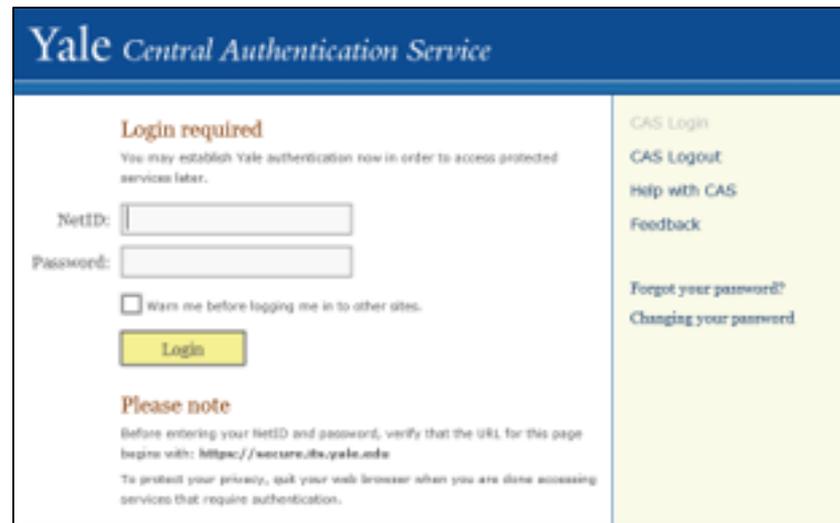
- Select a requirement that has a system indicator of "X" and click on the small magnifying glass icon in the Banner toolbar.

The screenshot shows the Banner 8 Applicant Requirements form. The toolbar at the top contains a magnifying glass icon highlighted with a red box and a yellow arrow. The 'Requirements' table below has a row for 'BUCKLE' highlighted with a red box, and a yellow arrow points to the 'X' in the 'System' column.

Requirement	Status	Status Date	Established Date	Satisfied	Perkins MPN	Fund	Period	System
BUCKLE	R	11-JUL-2018	11-JUL-2018	Y	<input type="checkbox"/>			X
PCTR	R	31-JUL-2018	31-JUL-2018	Y	<input type="checkbox"/>			X
SCTR	R	03-JUL-2018	03-JUL-2018	Y	<input type="checkbox"/>			X

Banner 8 Forms to AppXtender WebXtender 16.3 (Cont.)

4. Banner will open a new tab in your Internet Explorer browser with a CAS authentication window. Use your NetID and CAS password to authenticate. Do not use your Banner password.



The screenshot shows the Yale Central Authentication Service (CAS) login page. The page has a blue header with the text "Yale Central Authentication Service". Below the header, there is a "Login required" section with a warning message: "You may establish Yale authentication now in order to access protected services later." This section contains two input fields for "NetID:" and "Password:", a checkbox for "Warn me before logging me in to other sites.", and a yellow "Login" button. Below this is a "Please note" section with instructions: "Before entering your NetID and password, verify that the URL for this page begins with: <https://secure.its.yale.edu>" and "To protect your privacy, quit your web browser when you are done accessing services that require authentication." On the right side of the page, there is a yellow sidebar with links: "CAS Login", "CAS Logout", "Help with CAS", "Feedback", "Forgot your password?", and "Changing your password".

Banner 8 Forms to AppXtender WebXtender 16.3 (Cont.)

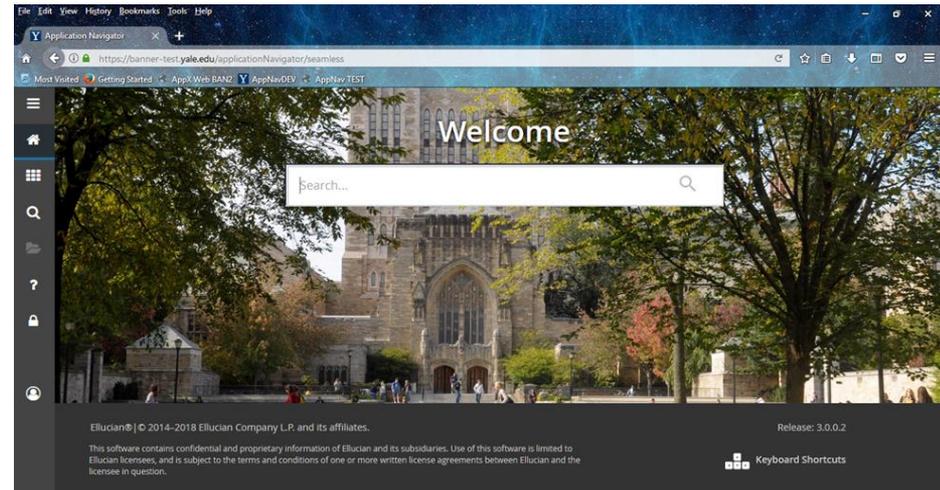
5. After CAS authentication, the AppXtender web client will open the document attached to the requirement.

The screenshot displays the AppXtender web client interface. The top navigation bar includes the logo 'opentext | ApplicationXtender - BAN2' and user information 'D.JH72'. The main content area is divided into three sections:

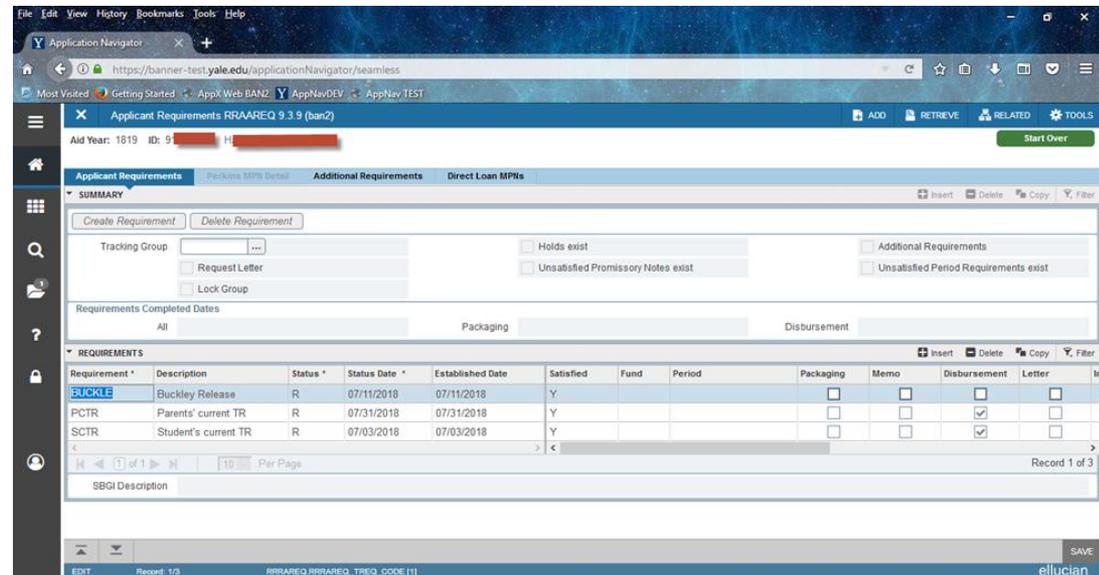
- Document Viewer:** Shows 'Document 1 of 1' with navigation options for 'PREVIOUS' and 'NEXT'. It includes a search bar, 'EMAIL', 'EXPORT', and 'PRINT' buttons. Below this is a toolbar with 'Page' (1/2), 'Scanner', 'Rotate', 'Zoom' (10%), and 'More' options.
- Document Content:** Displays a document page titled 'Chapter 3 Working With Documents'. The page includes a 'POSTED' stamp, a date stamp 'LIKELY - DJH72 / 8/1/2018', and a list of links for adding documents to AppXtender Applications.
- Form:** A vertical form on the right side of the screen with fields for: ID (9), PIDM (1), DOCUMENT TYPE (TRACKING REQUIREMENT), LAST NAME (T), FIRST NAME, SSN, BIRTH DATE (1), AID YEAR (1819), TRACKING REQUIREMENT (BUCKLE), TRACKING STATUS (R), FUND, SOURCE/INST CODE, and PERIOD. A 'MODIFY' button is located at the bottom right of the form.

Scenario 3: Banner 9 Admin Forms to AppXtender Document Manager 16.3

1. Log into Banner 9 Admin Forms.



2. Load financial Aid tracking requirements for a student.



Banner 9 Admin Forms to AppXtender Document Manager 16.3

3. Select a requirement that has a system indicator of “X” and click the **Retrieve** button in the upper-right corner of the application window:

The screenshot shows the Banner 9 Admin Forms interface. The browser address bar displays the URL: <https://banner-test.yale.edu/applicationnavigator/learn/less>. The page title is "Applicant Requirements RRAAREQ 9.3.9 (ban2)". The interface includes a navigation menu on the left and a main content area with a "SUMMARY" section and a "REQUIREMENTS" table. The "REQUIREMENTS" table has columns: Requirement #, Description, Status, Status Date, Established Date, Packaging, Memo, Disbursement, Letter, Info Access, System, and S. The first row, "BUCKLE Buckley Release", has a status of "R", status date of "07/11/2018", established date of "07/11/2018", and a system indicator of "X". The "Retrieve" button in the upper right corner of the application window is highlighted with a red box and a yellow arrow. Another yellow arrow points to the "System" column of the first row in the requirements table.

Requirement #	Description	Status	Status Date	Established Date	Packaging	Memo	Disbursement	Letter	Info Access	System	S
BUCKLE	Buckley Release	R	07/11/2018	07/11/2018	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	X	(R)
FCUR	Parents current TR	R	07/03/2018	07/03/2018	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		(R)
SCTR	Student's current TR	R	07/03/2018	07/03/2018	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		(R)

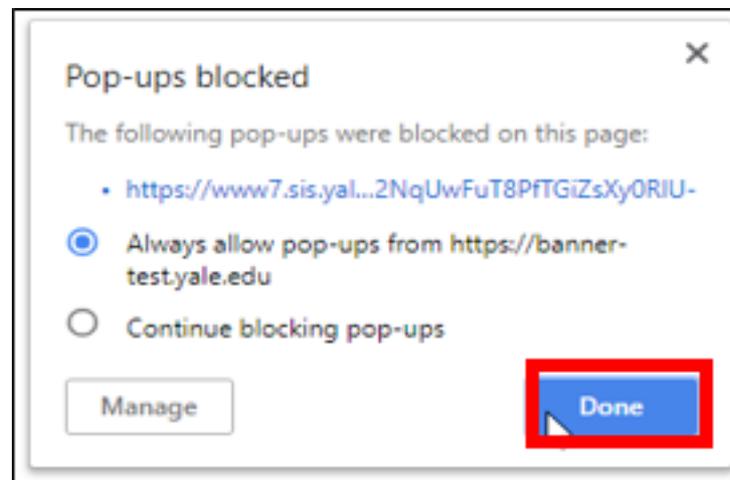
Banner 9 Admin Forms to AppXtender Document Manager 16.3

Note: Your browser's settings may automatically block pop-ups. Change these settings to allow pop-ups to appear on the browser.

- You may allow pop-ups on Google Chrome by clicking the icon in the address bar:

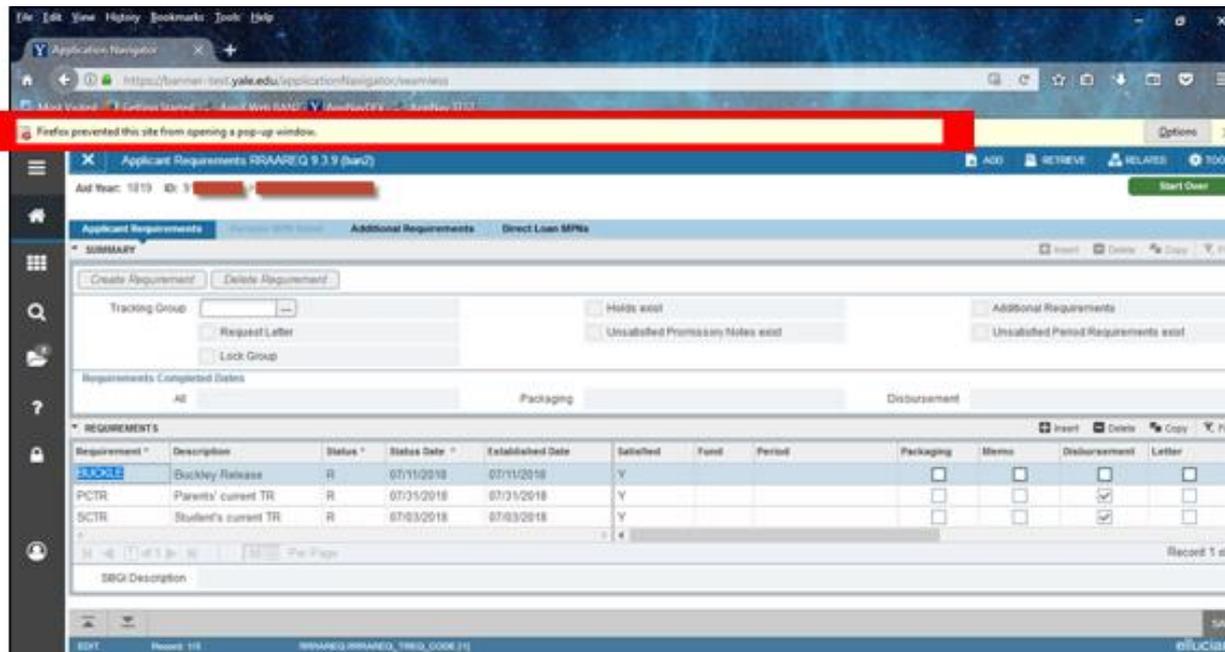


- Click on that tiny little box and when the pop-up box appears, tell Chrome to always allow pop-ups from the server:

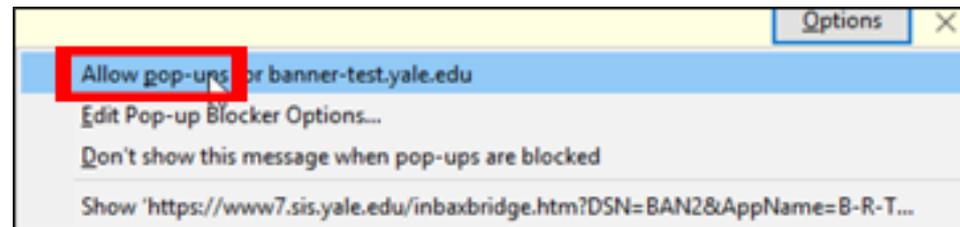


Banner 9 Admin Forms to AppXtender Document Manager 16.3

- You may allow pop-ups on Firefox by reviewing the following message displayed upon denying a pop-up on screen:

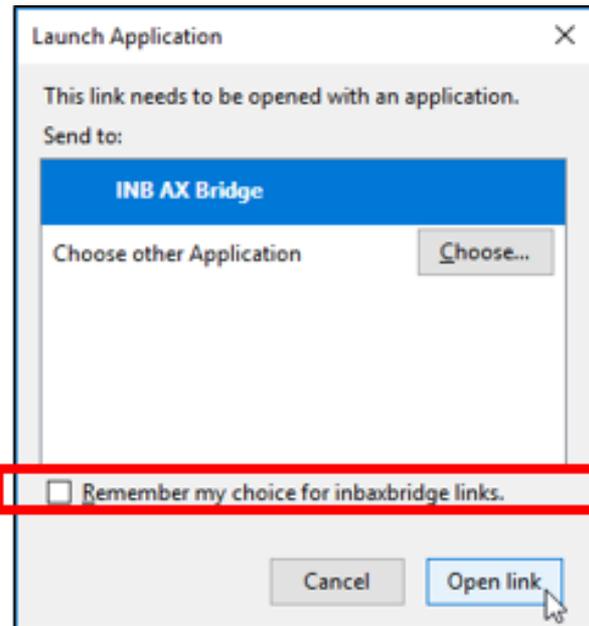


- Click on the options button and select the option 'Allow pop-ups for banner.yale.edu'.



Banner 9 Admin Forms to AppXtender Document Manager 16.3

4. This will open another window in your browser with the pop-up. The pop-up will be the INB-AX bridge asking for permission to run. Click 'Open Link'. The system will do this for every document you retrieve from within Banner, so it's possible you could have many additional tabs opened up in your browser.
- **Note:** If you don't want to see this pop-up message window every time you open a document from Banner, click the box for 'Remember my choice for inbaxbridge links'.



Banner 9 Admin Forms to AppXtender Document Manager 16.3

5. The INB-AX bridge will open Document Manager and ask for your Banner ID and Banner password.

Login to BAN2

Please enter your ApplicationXtender user name and password.

User Name: DJH72

Password: ██████████

Remember password

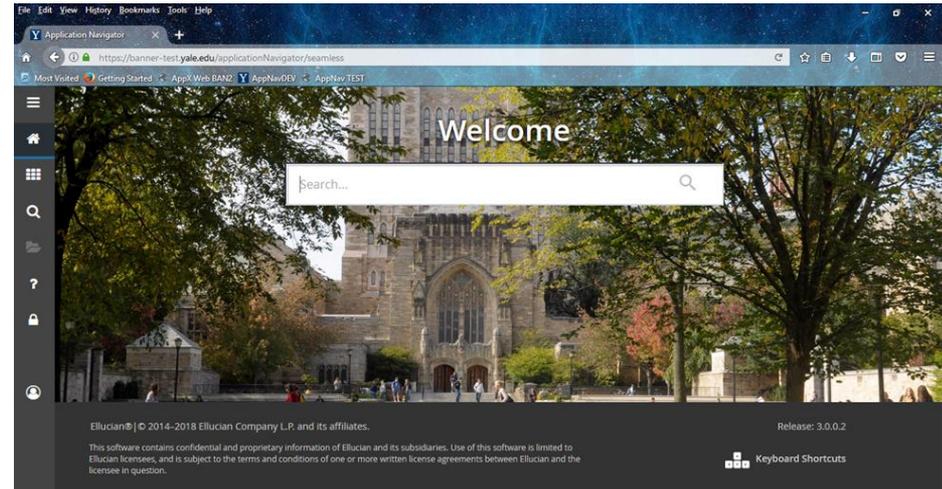
Login Cancel

6. Once logged on, Document Manager will automatically retrieve and display the document.

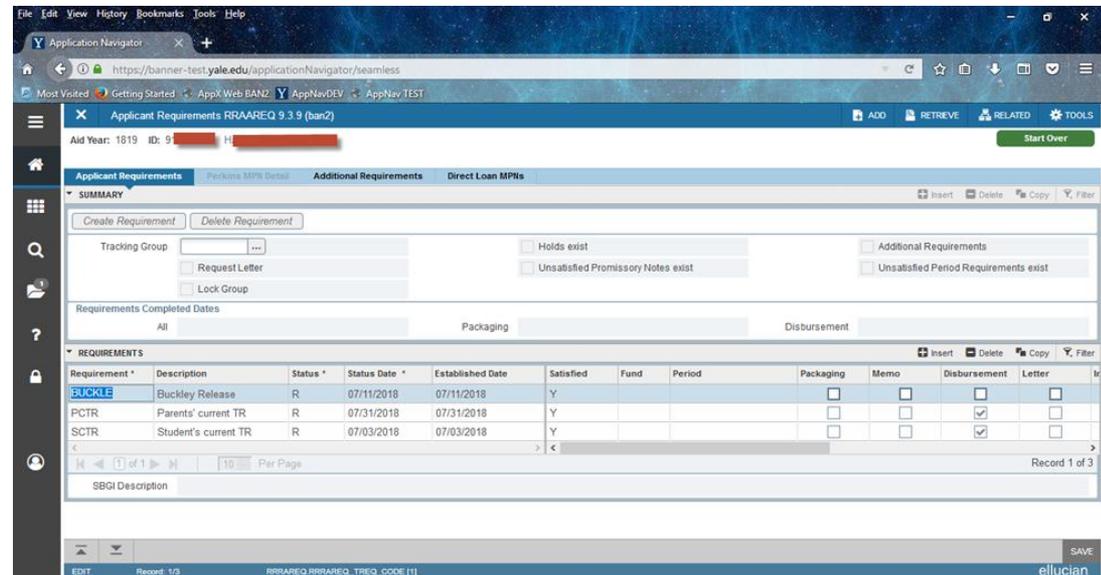
ID	PIDM	DOCUMENT TYPE	LAST NAME
91	1	TRACKING REQUIREMENT	

Scenario 4: Banner 9 Admin Forms to AppXtender Document Manager 16.3

1. Log into Banner 9 Admin Forms.



2. Load financial Aid tracking requirements for a student.



Banner 9 Admin Forms to AppXtender Document Manager 16.3

- Select a requirement that has a system indicator of “X” and click the **Retrieve** button in the upper-right corner of the application window:

The screenshot shows the Banner 9 Admin Forms interface. The top navigation bar includes a 'RETRIEVE' button, which is highlighted with a red box and a yellow arrow. Below the navigation bar, there is a 'SUMMARY' section with various options like 'Create Requirement', 'Delete Requirement', and 'Request Letter'. The main content area displays a table of requirements. The first row, 'BUCKLE', is highlighted with a red box and has a yellow arrow pointing to its 'System' column, which contains an 'X' indicator. The table has columns for Requirement #, Description, Status, Status Date, Established Date, Packaging, Memo, Disbursement, Letter, Info Access, System, and S.

Requirement #	Description	Status	Status Date	Established Date	Packaging	Memo	Disbursement	Letter	Info Access	System	S
BUCKLE	Buckley Release	R	07/11/2018	07/11/2018	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	X	(f)
FCUR	Parents current TR	R	07/03/2018	07/03/2018	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	X	(f)
SCTR	Student's current TR	R	07/03/2018	07/03/2018	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	X	(f)

Note: Review the pop-up solutions mentioned in slides 11-12 if your browser automatically blocks pop-ups from appearing on your screen.

Banner 9 Admin Forms to AppXtender Document Manager 16.3

- Banner 9 will open another tab in your browser and automatically load the student's tracking document in the WebXtender application.

The screenshot displays the AppXtender Document Manager interface. The top navigation bar includes the breadcrumb "B-R-TREQ > New Search > Query Results > 9" and the document identifier "Document 1 of 1". The main area is divided into three sections:

- Document Viewer:** Shows a document titled "Chapter 3 Working With Documents". The document content includes a heading "Chapter 3 Working With Documents" and a list of topics:
 - Using ApplicationXtender Web Access, you can perform many of the document-related activities that are available in ApplicationXtender Document Manager. For example, you can add new documents, delete existing documents, add pages to documents, and remove pages from documents. You can also create back documents and use automatic indexing functionality to automatically track new documents.
 - This section of help provides information and procedures related to adding and deleting documents and pages, indexing documents, and removing documents for full-text indexing.
 - Adding Documents to ApplicationXtender Applications page 91
 - Indexing Documents page 102
 - Subsetting Documents for Full-Text Indexing page 103
 - Adding Pages to ApplicationXtender Documents page 104
 - Tracking Documents page 105
 - Removing Existing Documents page 106
 - Adding Documents to Documents page 107
- Metadata Form:** A form on the right side of the interface for entering document details. The fields and their values are:
 - ID: 9
 - PIDM: 1
 - DOCUMENT TYPE: TRACKING REQUIREMENT
 - LAST NAME: T
 - FIRST NAME: [Redacted]
 - SSN: [Redacted]
 - BIRTH DATE: 1
 - AID YEAR: 1819
 - TRACKING REQUIREMENT: BUCKLE
 - TRACKING STATUS: R
 - FUND: [Redacted]
 - SOURCE/INST CODE: [Redacted]
 - PERIOD: [Redacted]
- Tools:** A toolbar at the top of the viewer area includes options for Page (1/2), Scanner, Rotate, Zoom (10%), and actions like EMAIL, EXPORT, and PRINT.