Banner to AppX 16.3

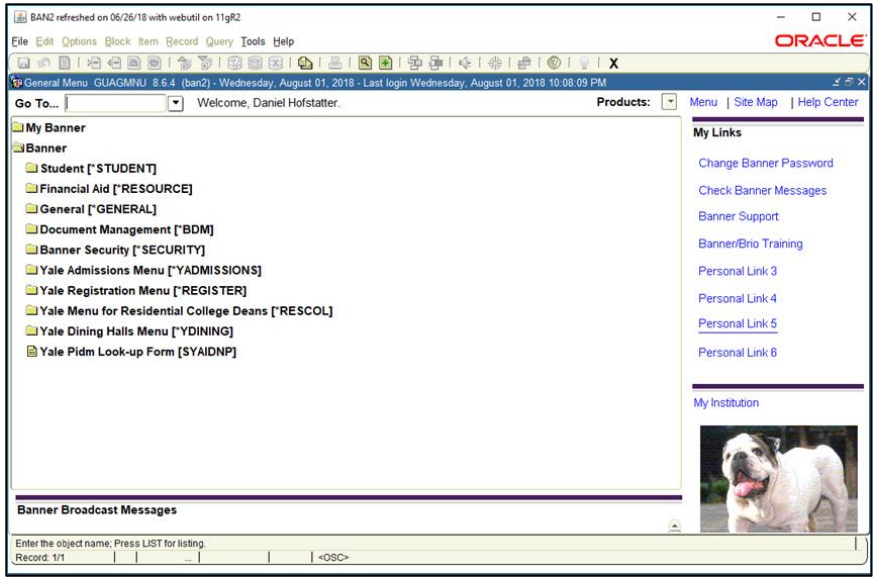
Description: This Quick Guide provides the steps necessary to move between Banner and its integrated system, ApplicationXtender in four different scenarios.

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

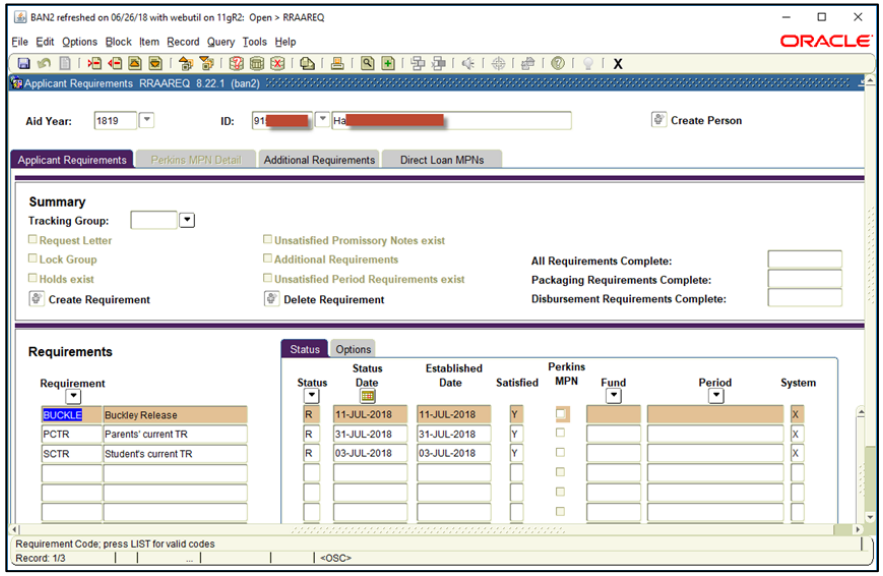
- Scenario #1: Banner 8 Forms to AppX Document Manager 16.3
- Scenario #2: Banner 8 Forms to AppX WebXtender 16.3
- Scenario #3: Banner 9 Admin forms to AppX Document Manager 16.3
- Scenario #4: Banner 9 Admin Forms to AppX WebXtender 16.3

Scenario 1: Banner 8 Forms to AppX Document Manager 16.3

1. Log into Banner 8 Forms.

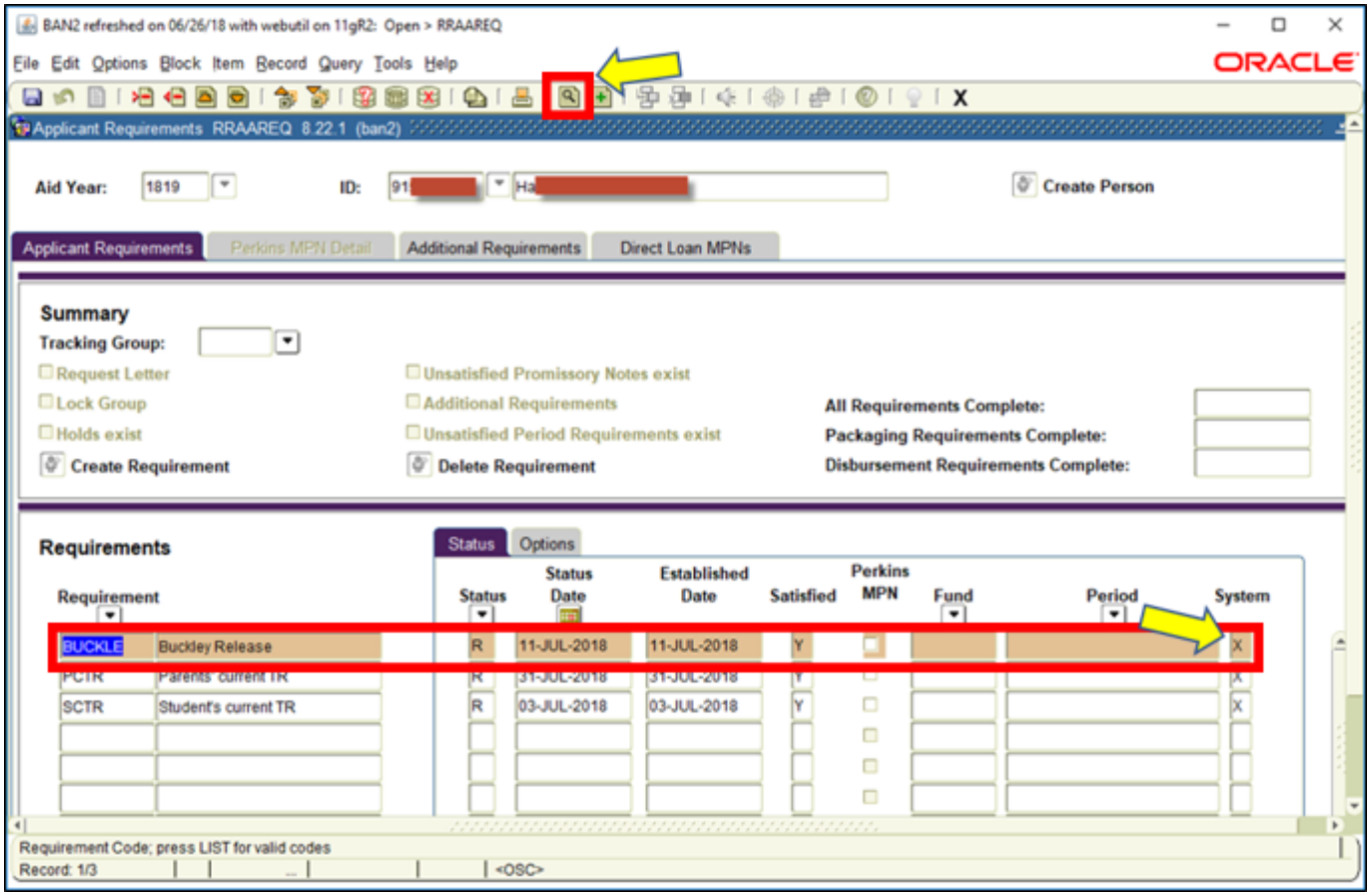


2. Load Financial Aid tracking requirements for a student.



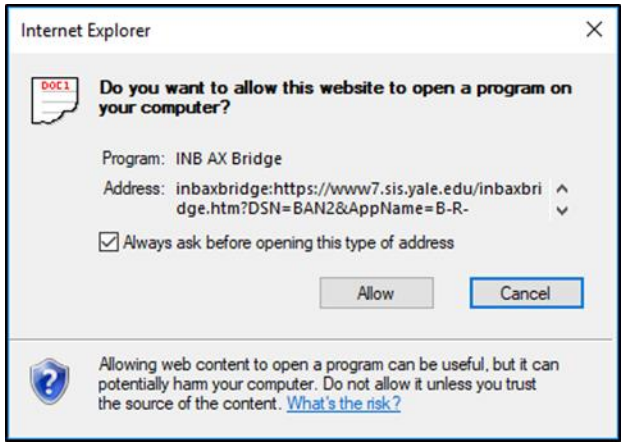
Banner 8 Forms to AppX Document Manager 16.3 (cont.)

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

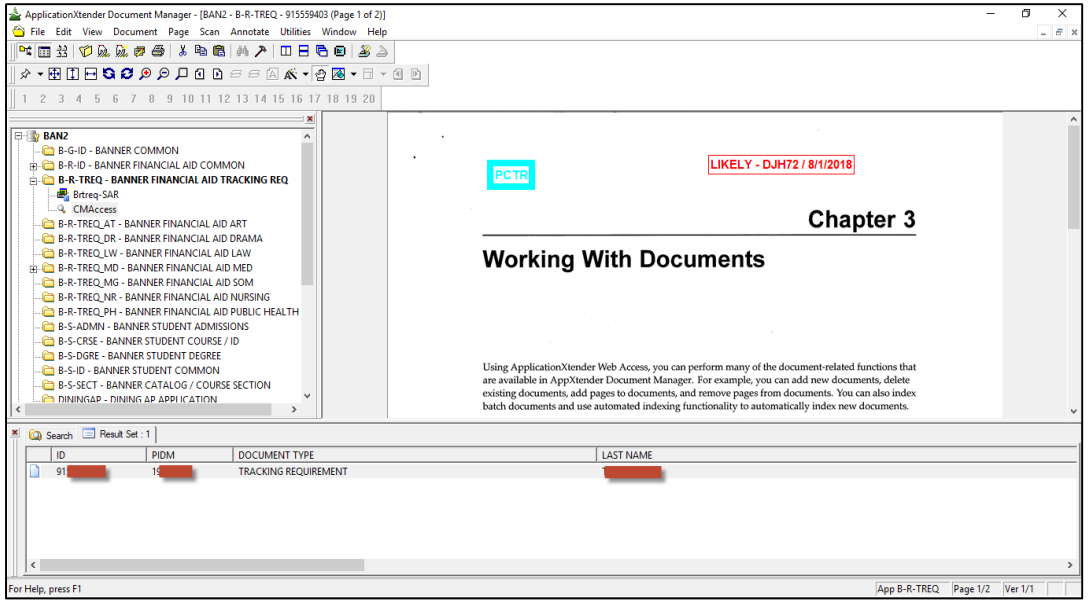


Banner 8 Forms to AppX Document Manager 16.3 (cont.)

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

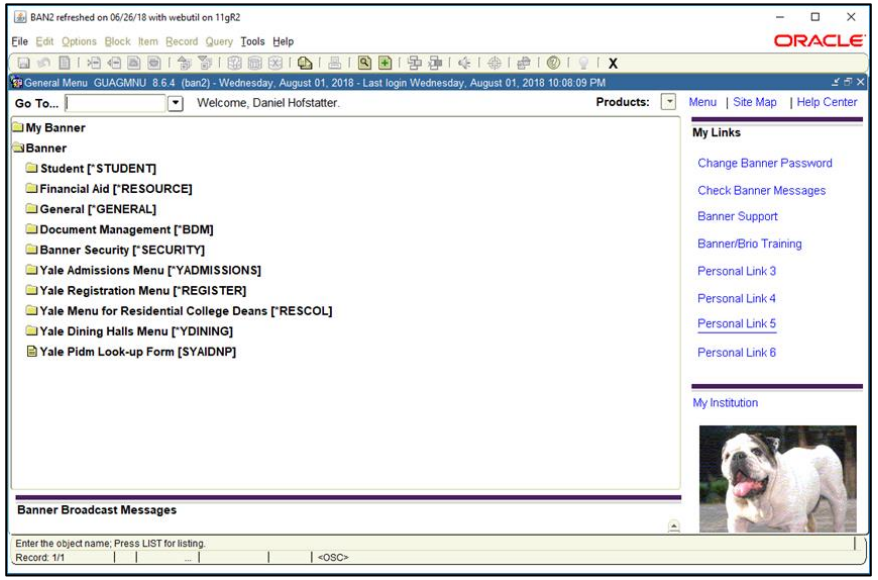


5. The INB-AX bridge program will open the Document Manager application and retrieve the document automatically.

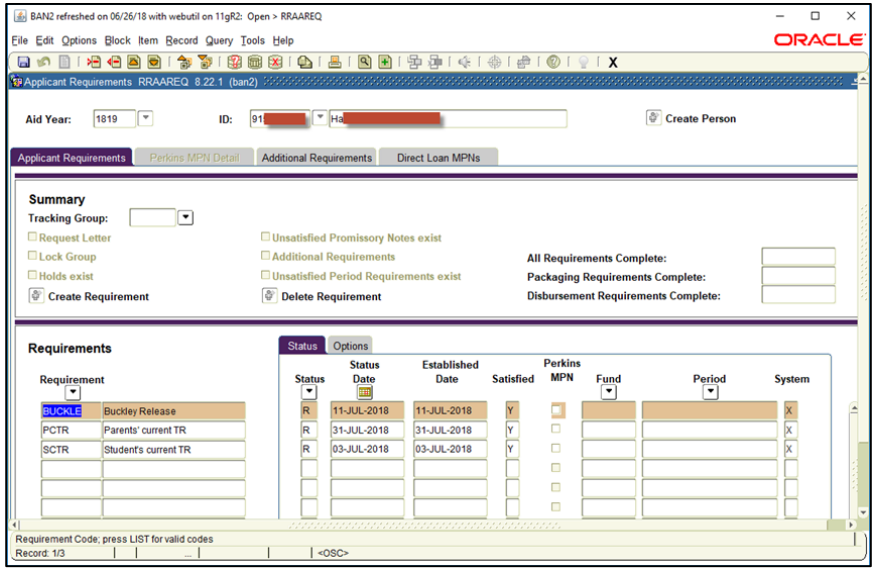


Scenario 2: Banner 8 Forms to AppXtender WebXtender 16.3

1. Log into Banner 8 Forms.

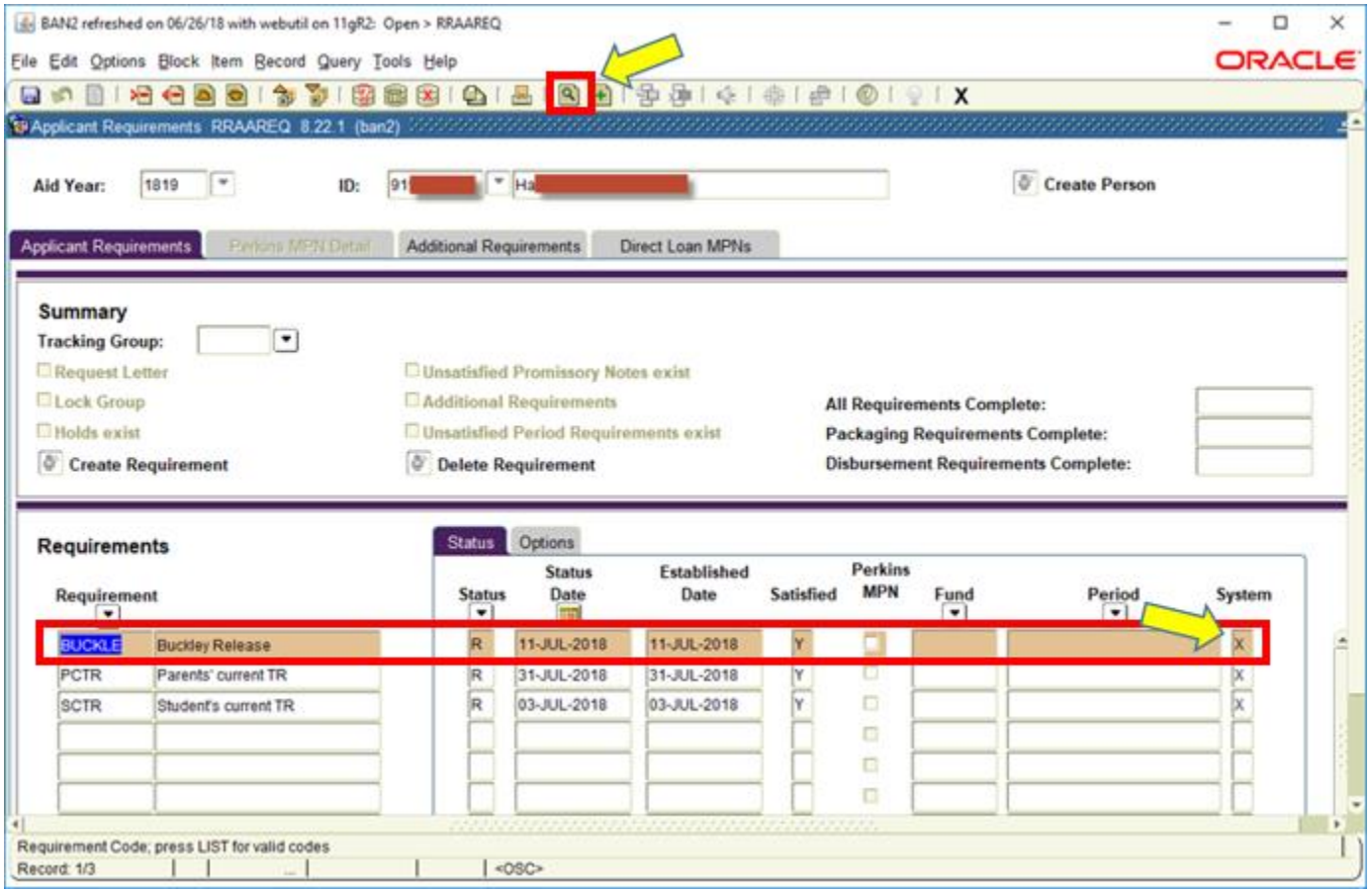


2. Load Financial Aid tracking requirements for a student.



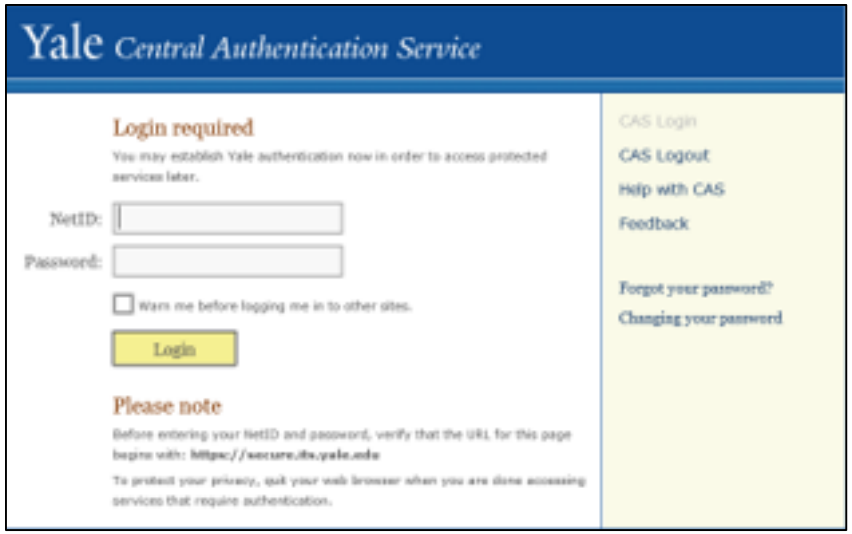
Banner 8 Forms to AppXtender WebXtender 16.3 (Cont.)

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



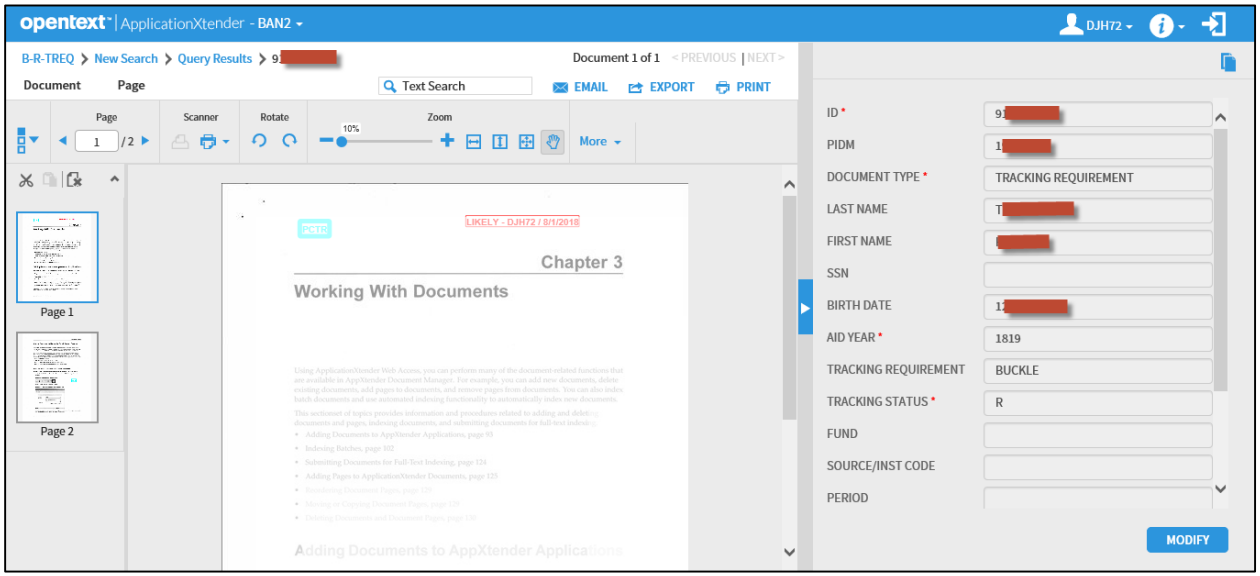
Banner 8 Forms to AppXtender WebXtender 16.3 (Cont.)

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.



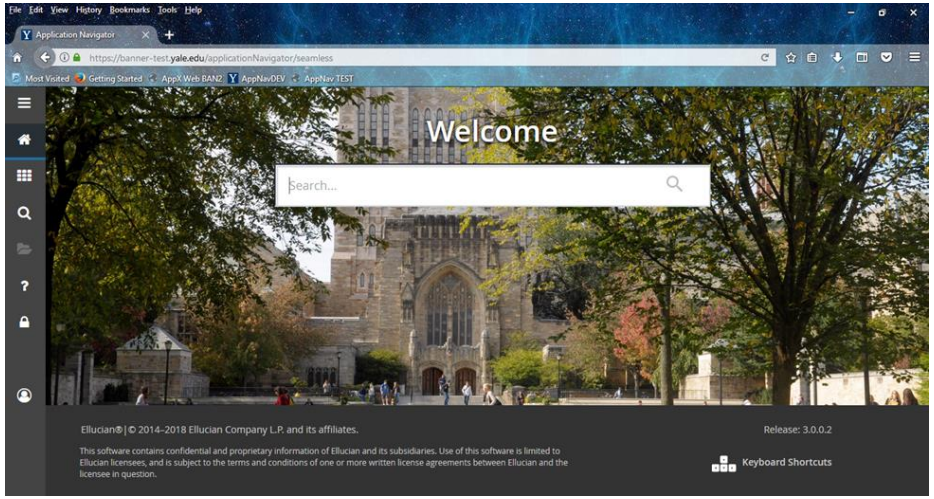
Banner 8 Forms to AppXtender WebXtender 16.3 (Cont.)

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

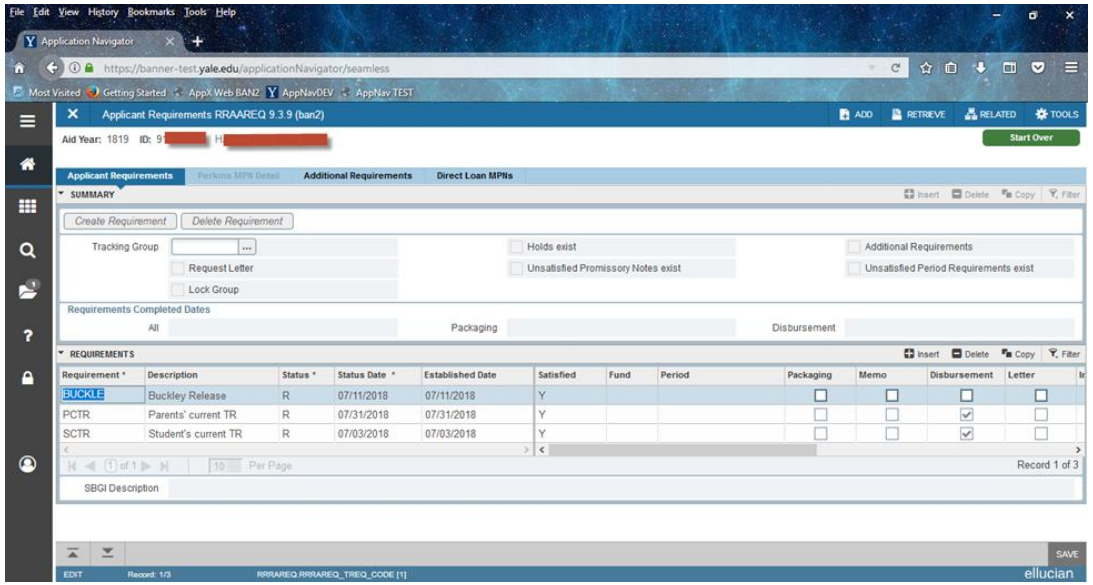


Scenario 3: Banner 9 Admin Forms to AppXtender Document Manager 16.3

1. Log into Banner 9 Admin Forms.

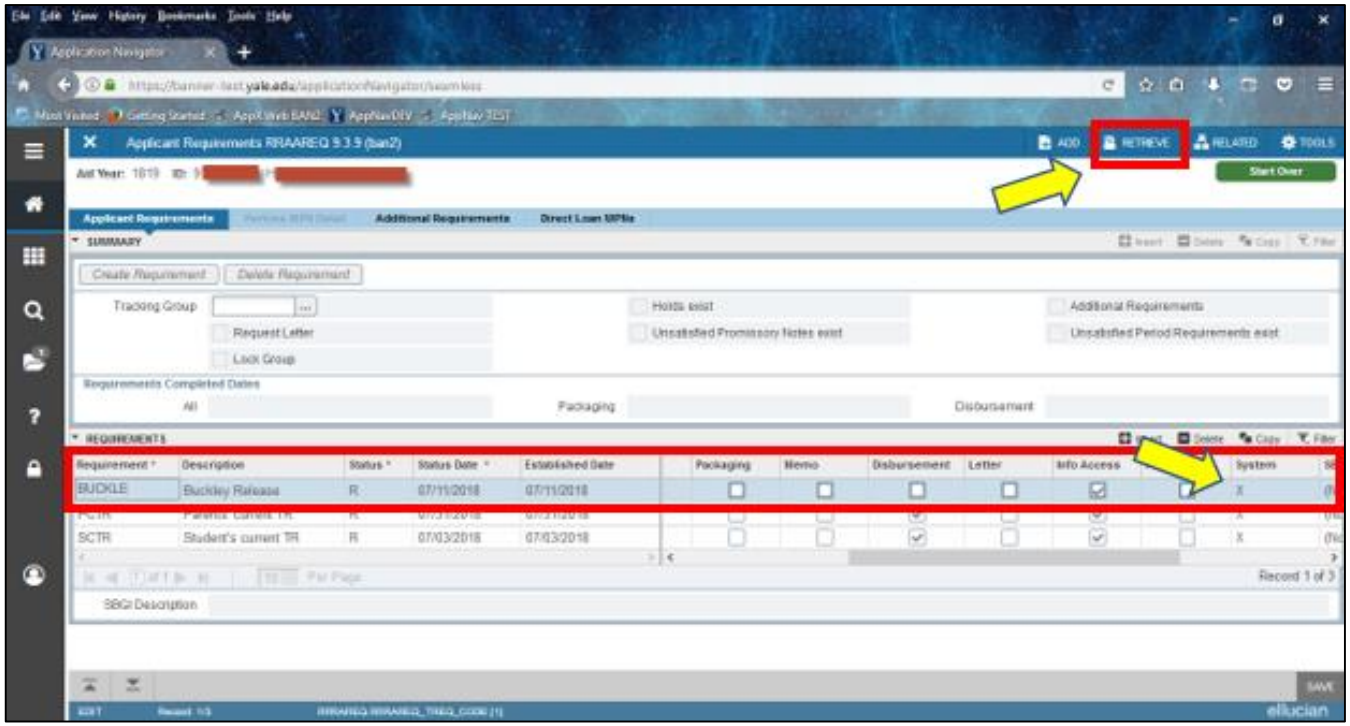


2. Load financial Aid tracking requirements for a student.



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:

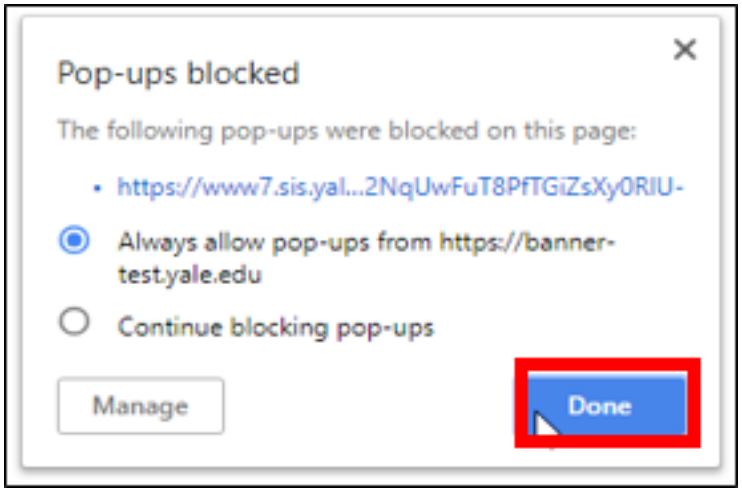


Banner 9 Admin Forms to AppXtender Document Manager 16.3

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

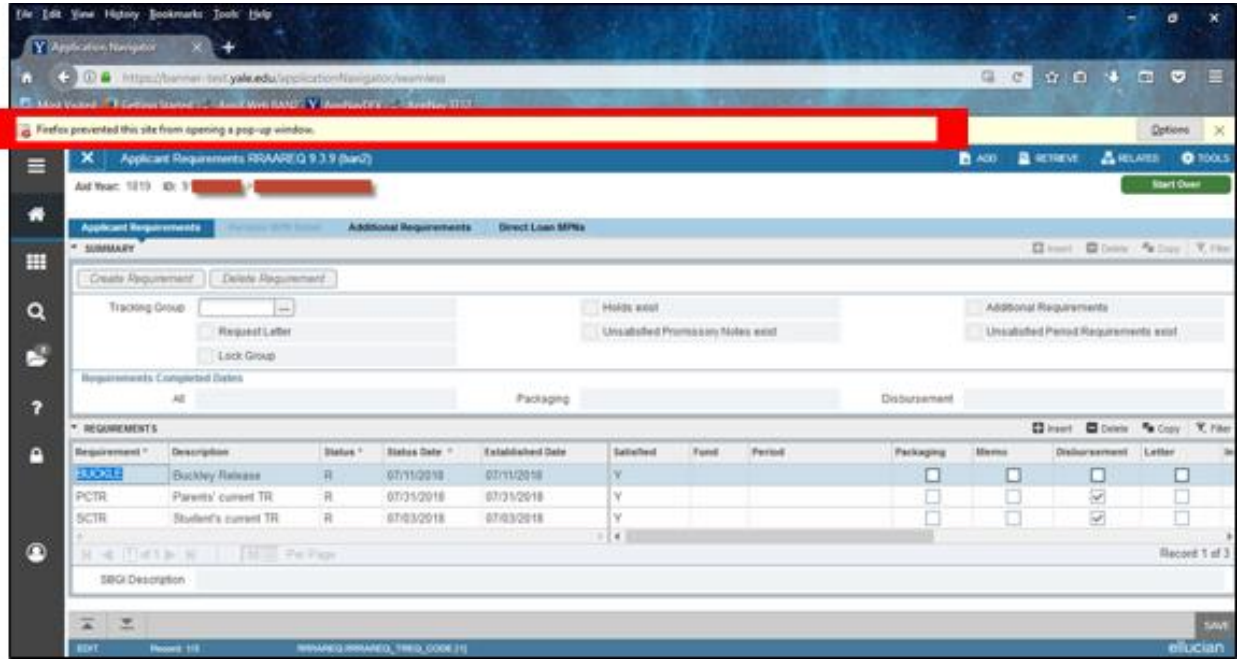
- You may allow pop-ups on Google Chrome by clicking the icon in the address bar:

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

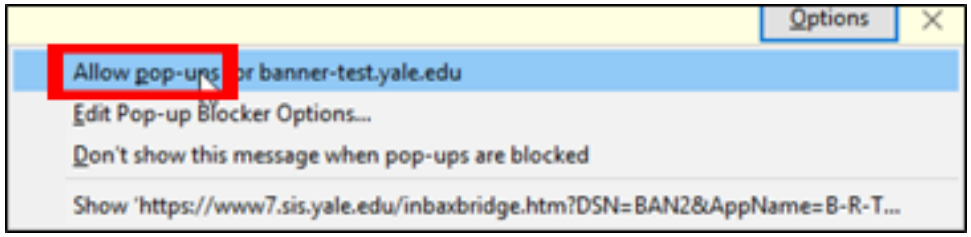


Banner 9 Admin Forms to AppXtender Document Manager 16.3

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

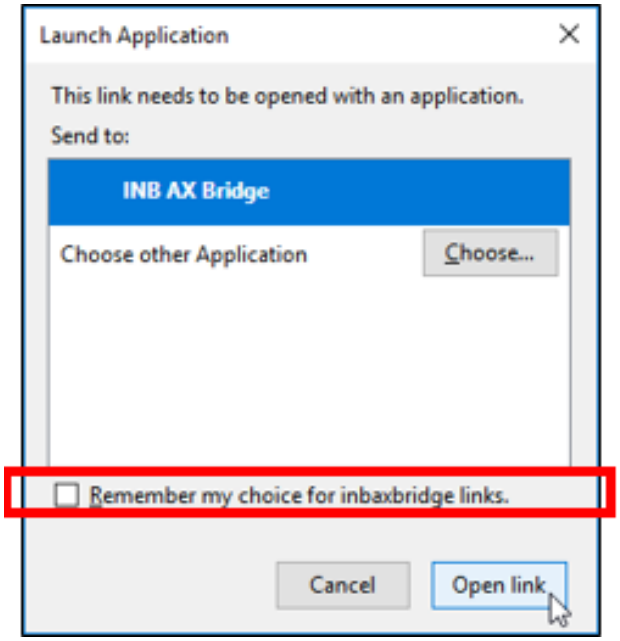


- Click on the options button and select the option 'Allow pop-ups for banner.yale.edu'.



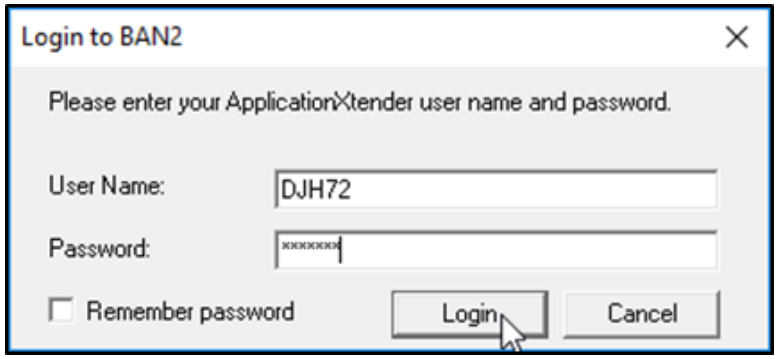
Banner 9 Admin Forms to AppXtender Document Manager 16.3

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'.

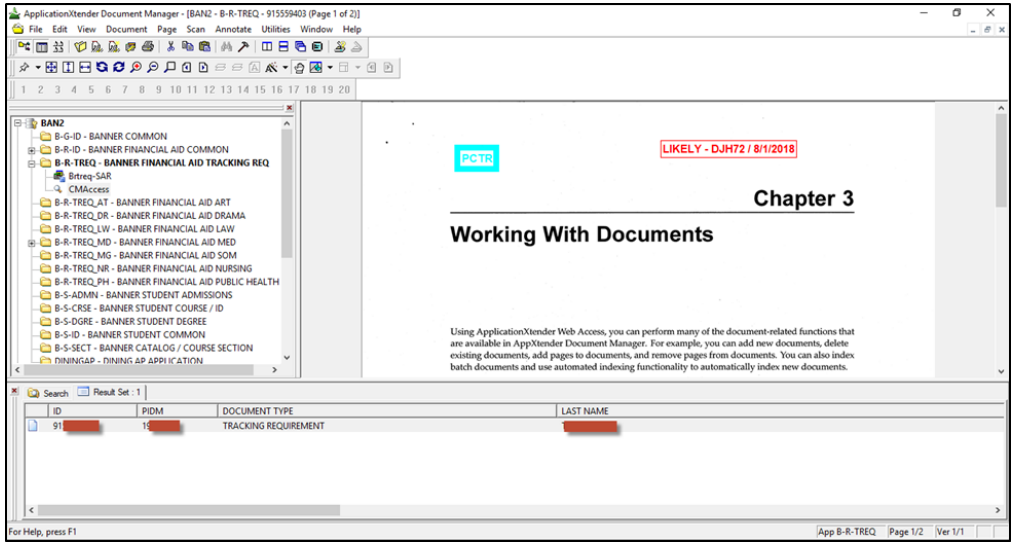


Banner 9 Admin Forms to AppXtender Document Manager 16.3

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

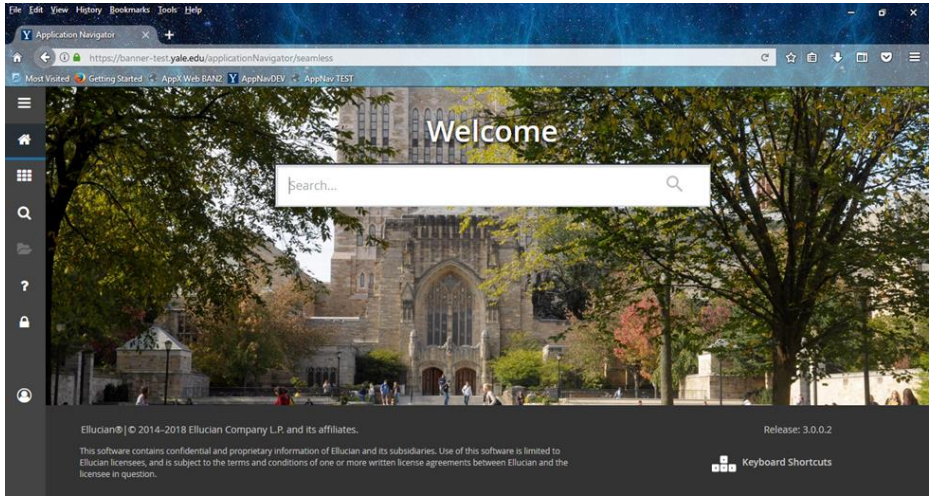


6. Once logged on, Document Manager will automatically retrieve and display the document.

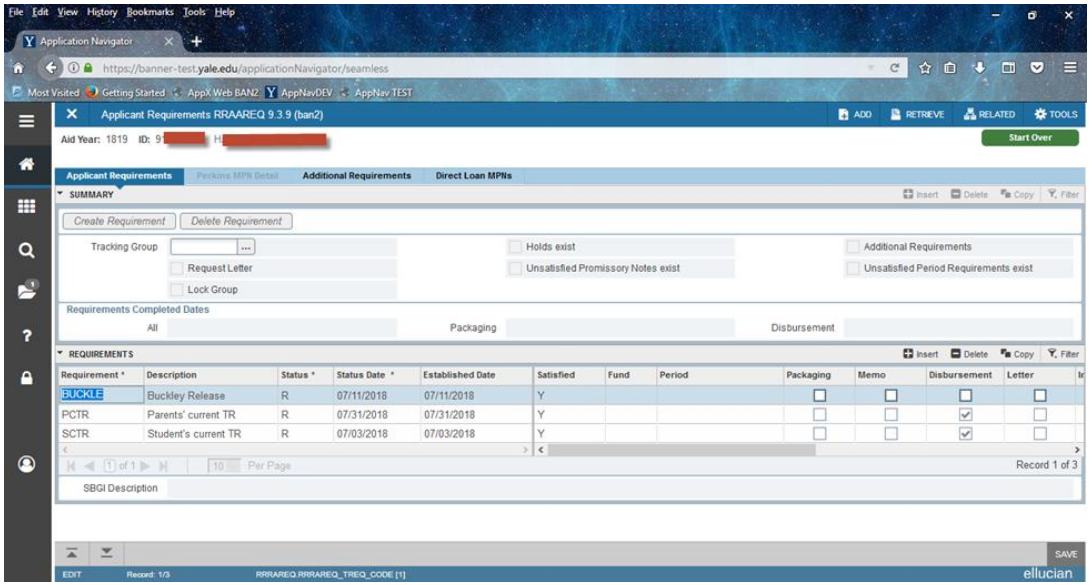


Scenario 4: Banner 9 Admin Forms to AppXtender Document Manager 16.3

1. Log into Banner 9 Admin Forms.

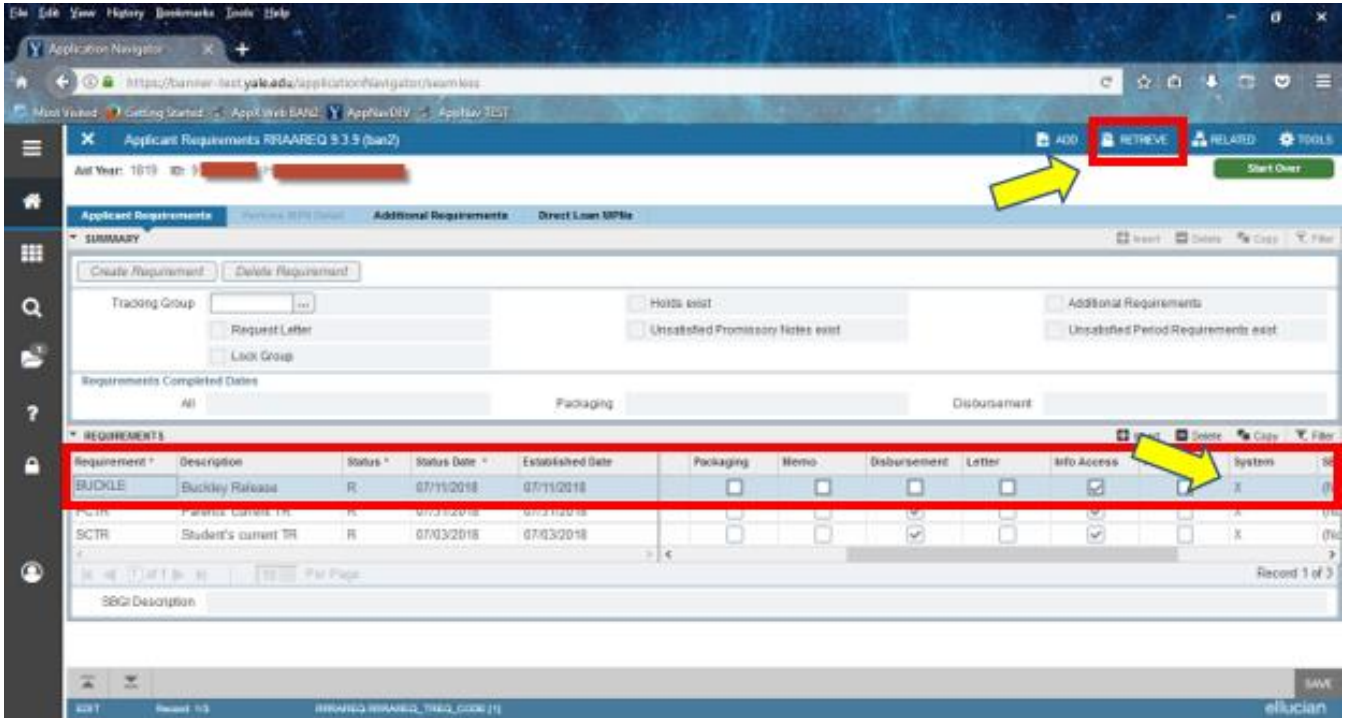


2. Load financial Aid tracking requirements for a student.

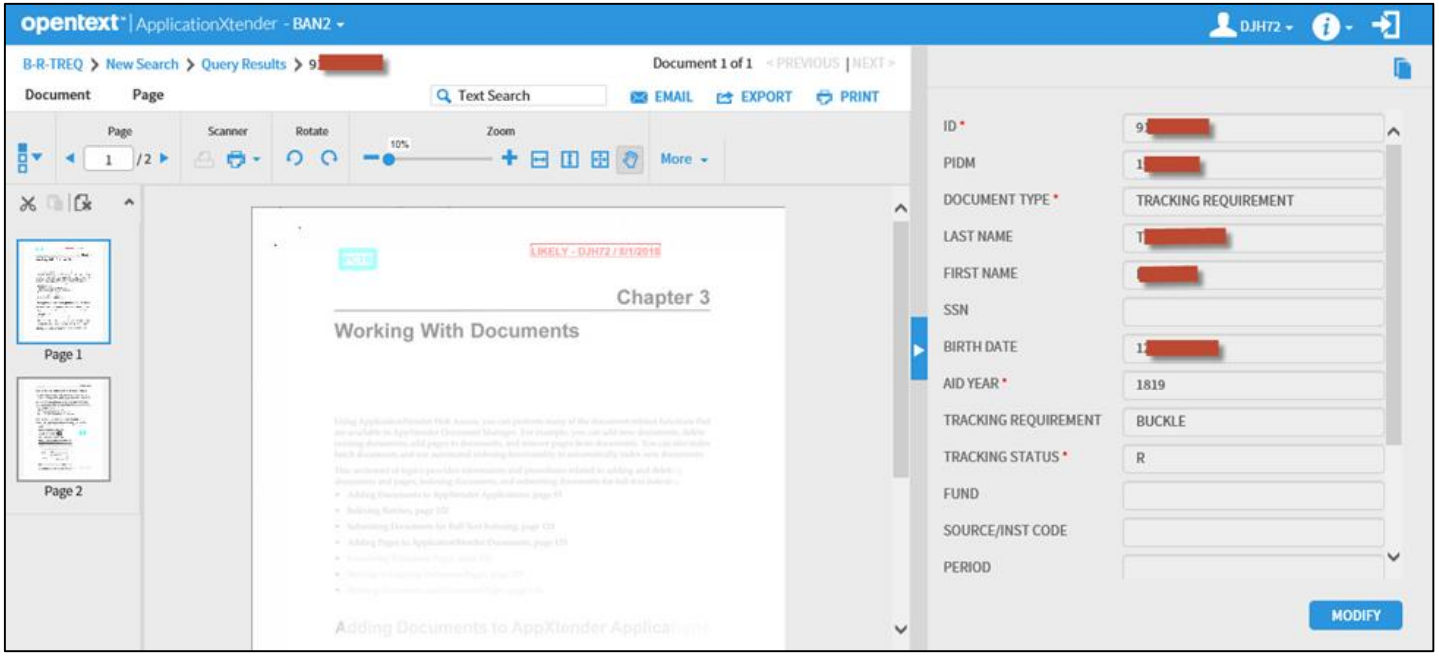


Banner 9 Admin Forms to AppXtender Document Manager 16.3

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:



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

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