Banner 9 Admin to ApplicationXtender 16.3 Integration

The purpose of this guide is to provide you with instructions for moving between Banner 9 and its integrated system, ApplicationXtender 16.3.

This integration works for baseline tracking requirements for Financial Aid and Admissions.

There are two different scenarios that will be covered in this guide.

    I.   **Connecting Banner 9 Admin Forms to AppX Document Manager**

    II.   **Connecting Banner 9 Admin Forms to AppX WebXtender**

Browser Tips:
1. Update your browser to the latest release.
2. Before you begin check your browser settings and allow pop-ups.

For help contact the Finance Support Center at 203-432-5394 or sharedservices@yale.edu.

Revised: 1/9/2020 Note: Updated to meet accessibility requirements. Removed pages 2- 4 per Dan.

Banner 9 Admin Forms to AppX WebXtender

Connecting to AppX WebXtender

1. Login to Banner 9 Admin Forms.

2. Go to **RRAAREQ** (Applicant Requirements). This will show the applicant tracking requirements.

3. Current **Aid Year** will be populated. Enter the student **ID** and click **Go**.

4. In the **Requirements** section select a requirement that has an '**X**' in the **Systems** indicator column.

5. Click **Retrieve** in the top tool bar.

Note: If the Pop-ups Blocked message displays, click the **Always allow pop-ups from https://banner.yale.edu** option then click **Done**.

6. The browser will open a new Banner tab for **opentext ApplicationXtender**.

7. The query results for the **student ID** requirement selected are displayed automatically in the document manager.

8. The student tracking document is displayed in the **WebXtender** application.