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.
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.