

BDMS ApplicationXtender (AppXtender) for Finance Budget Managers

Use Single Sign On and Banner to Activate Document Images (AppXtender)

1. Login to mysjfc.edu
2. Click the link to **Banner 9** from top of the Launchpad
3. Type **FGIBDST** (Organization Budget Status) to look up a budget
 - a. Enter the appropriate Org and Fund info and select **[GO]**
4. Click or Highlight the **YTD Activity** amount of the Account row that you wish to review.
5. Click the **Related** button in the blue ribbon at the top.
 - a. From the menu, select **Transaction Detail Information [FGITRND]**
 - b. A list of transactions for that Account will display.
6. You will only be able to view Invoice documents that start with the letter “I” (capital i)
 - a. Find the Document number in the **Document*** column of the invoice to view
 - b. Click or Highlight the invoice document number
 - c. Copy or write down the Document number (You will need this in AppXtender)
7. On the Upper right Task Bar, Select **[Retrieve]**
 - a. If required, login to SJFC using your normal network credentials.
 - b. A new web browser tab with Opentext | ApplicationXtender will open
 - c. Click **[OK]** to “The number of records found exceeded the search size....”

View a Document in Document Images (AppXtender)

1. In the **Applications** menu (left side of screen), click B-F-Docs
2. In the center screen, click **New Query**.
3. In the **Document ID** field, enter the document number that you wrote down. For example, I0123456.
 - a. **Only Invoice documents** (starting with “I0” - second character is a zero) **can be viewed** in Banner Finance at this time.
 - b. Journal entries (starting with “J”, “F”, “B”) that perform a transfer or budget entry, can’t be viewed as many FOAPA’s are on each Journal entry.
4. Select **[RUN]** or press the **[Enter]** key.
 - a. **AppXtender verifies Fund-Org security.** You will only be able to view documents that you have access to. If an invoice was split between 2 or more departments, one of which you do not have access to, then you will not be allowed to view it. You must have access to all FOAPA’s charged on this invoice.
5. Viewing a document.
 - a. If you have access to this document, then the document will display.
 - b. If you do not have access, a message like, “No document found” is displayed.
 - i. Click **[OK]** and try a new document number
 - c. To prevent excessive printing, the Export and Print buttons are not available. If you need a pdf of this document, please contact Accounts Payable to send it to you.
 - d. To view another document, click B-F-Docs in the upper left corner
 - i. Go back to step 2 of **View a Document in Document Images (AppXtender)**

Exiting Document Images (AppXtender)

1. When done viewing documents, log out using the “arrow pointing to a door” icon in upper right corner of AppXtender screen.
 - a. Are you sure you want to log out? Select **[LOGOUT]**
2. Click “x” to exit from the Browser tab.