

# Finance AppXtender Web User Guide

For AppXtender Web Version 5.4

You can access Xtender through SNAP or through Banner. See below for detailed instructions.

## Accessing Xtender through Banner

1. Open **Internet Explorer** and type <http://snap.sdbor.edu> for PROD and <http://testportal.sdbor.edu> for TEST into your web browser address bar.
2. Log into SNAP.
3. Click on the **Finance** tab.
4. Click on the **Banner General Menu** link.
5. Once into Banner, click on the Xtender icon as shown below. The blank query screen will appear.



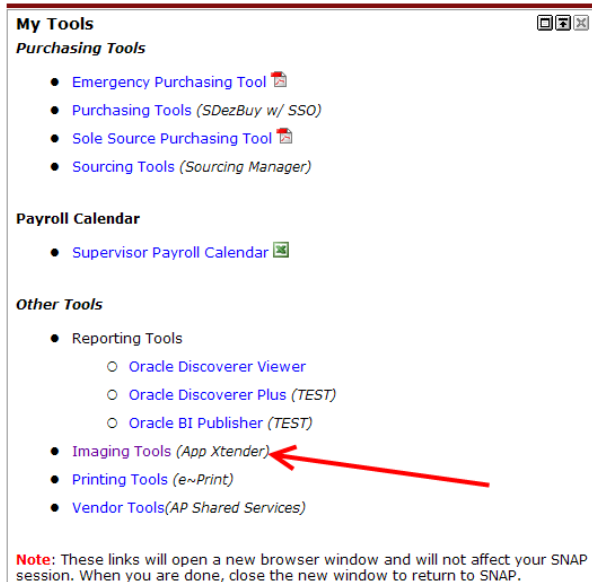
6. If you receive the message, "No Documents Found", click on the **OK** button.



## Accessing Xtender Through SNAP

1. Go to Internet Explorer or Firefox and type <http://snap.sdbor.edu> for PROD and <http://testportal.sdbor.edu> for TEST into your web browser address bar.
2. Log into SNAP or Test Portal.
3. Click on the **Finance** tab.
4. Find **My Tools > Other Tools**.

5. Find and click on **Imaging Tools (AppXtender)**. This will take you to the login screen for WebXtender.



6. Login as you would log into SNAP. (The checkbox under the username and password fields can be left as is.)

EMC documentum ApplicationXtender

## Login

Welcome to **ApplicationXtender Web Access**, please provide your user name and password:

Data Source: test.sdbor.edu

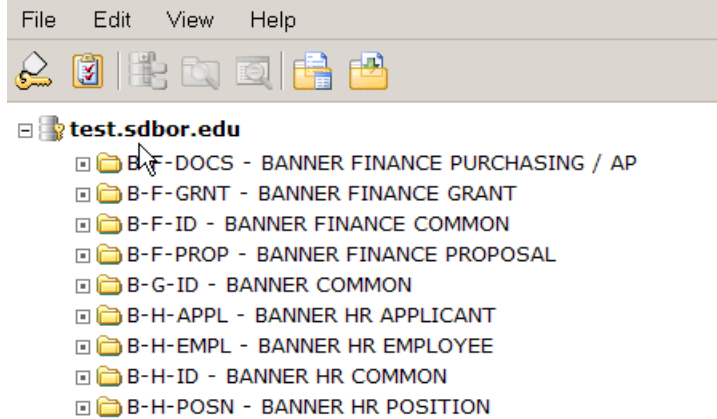
User Name:

Password:

Request Full Text Search Support

[?](#) for more information, see [Logging into ApplicationXtender Web Access](#).

7. Logging in takes you to the application list, as shown below.

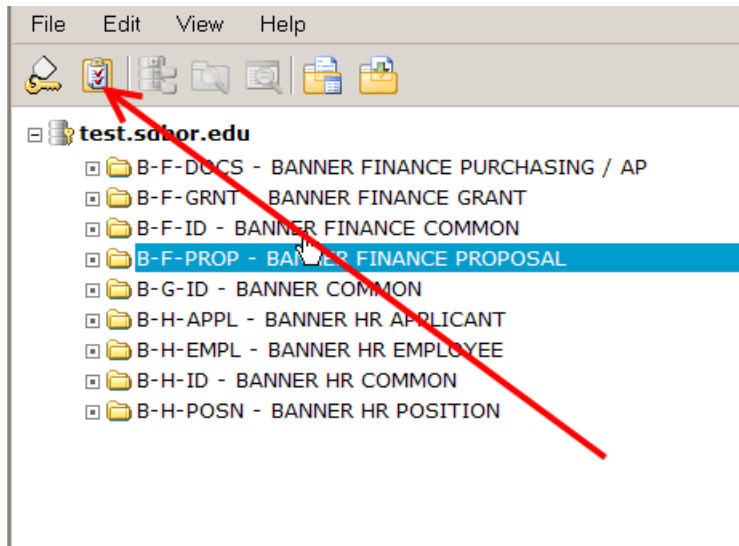


Note: You may not see all of the above folders listed when you are logged in. The folders that you see are the folders you have access to. This particular screen shot shows folders for Finance as well as HR.

## Turn on Interactive viewer (only needs to be done one time per user)

If this computer will be used for scanning, please ensure that the interactive viewer setting is turned on so that all scanning functionality will appear. **Note: Scanning is only supported in Internet Explorer 6 and 7.** Steps to turn on the interactive viewer are below.

1. Click on **Modify User Settings** as shown below.



2. Click on **Interactive Viewer**.

The screenshot shows a configuration window with a sidebar on the left containing several view options: Search/Result Set, Full Text, Document View, Interactive Viewer (highlighted with a red arrow), COLD, Result Set Print, Email, and Printer Friendly View. The main content area is titled 'Query And Result Set Display Options' and includes the following settings:

- Display Documents in Separate Popup Window
- Automatically open document if query yields one result
- Show Previous Document Version
- Enable ODMA Search
- Show Document ID
- Document ID Sort Order:
- Limit Search Size:
- Limit Query Results Page Size:

Below this is the 'Text Search Options' section:

- Enable Text Search
- Text Search Max Hits:

3. Ensure that “**Enable Interactive Viewer**” is checked as below.

The screenshot shows the same configuration window, but the sidebar now has 'Interactive Viewer' selected. The main content area is titled 'Interactive Viewer Options' and includes the following settings:

- Enable Interactive Viewer (highlighted with a red arrow)
- Use KeyView To Display Foreign Files
- Scale-To-Gray
- Display Annotation Toolbar
- Default Image Size:

Below this is the 'Print Options' section:

- Print Original Size
- Fit To Page
- Dithering
- Acceleration:
- Endorse Printed Pages
- Overlap Endorsement On Image
- Endorsement Position:
- Endorsement Text (roughly 200 characters are allowed):

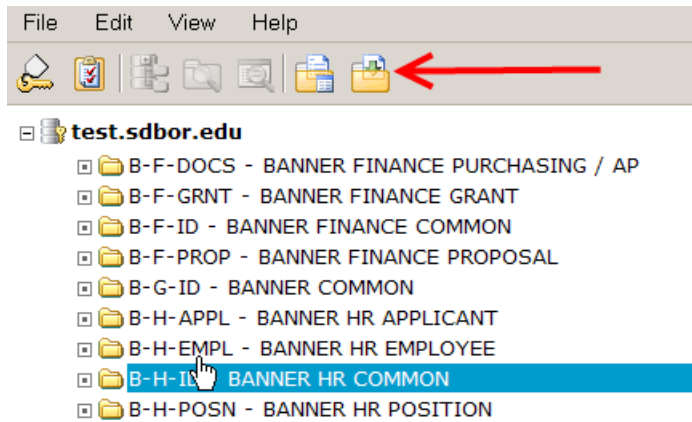
4. Click the **Save** button at the bottom of that page to save your settings.

**Note: If at any time during your Xtender session you receive prompts to install software please contact your IT dept to ensure this is done properly.**

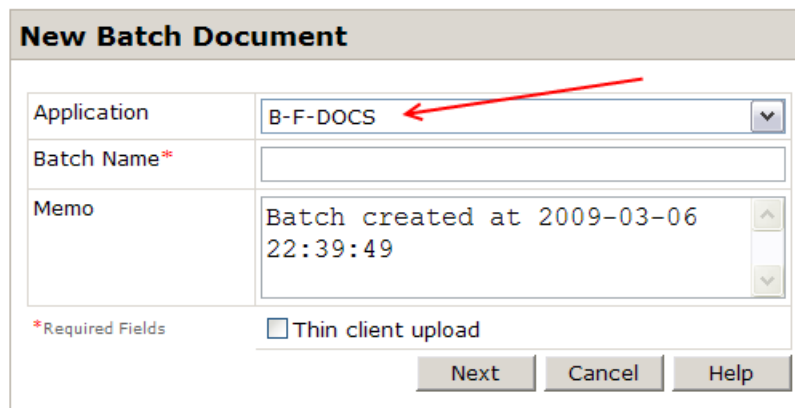
## Scanning

Finance attachments can be saved to various applications (B-F-DOCS, B-F-GRNT, B-F-ID, B-F-PROP).

1. Click on **File > Batch Import**, OR click on the Batch Import icon as seen below.



2. For our example: select B-F-DOCS in the **Application** drop-down menu, shown below.



New Batch Document	
Application	B-F-DOCS
Batch Name*	
Memo	Batch created at 2009-03-06 22:39:49
*Required Fields	<input type="checkbox"/> Thin client upload
<input type="button" value="Next"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/>	

3. Name your batch according to Finance naming conventions as shown below. (Campus Identifier\_mmddyy\_Type of Document\_Your Initials\_Batch Number) Then click on the **Next** button as below.

**New Batch Document**

Application: B-F-DOCS

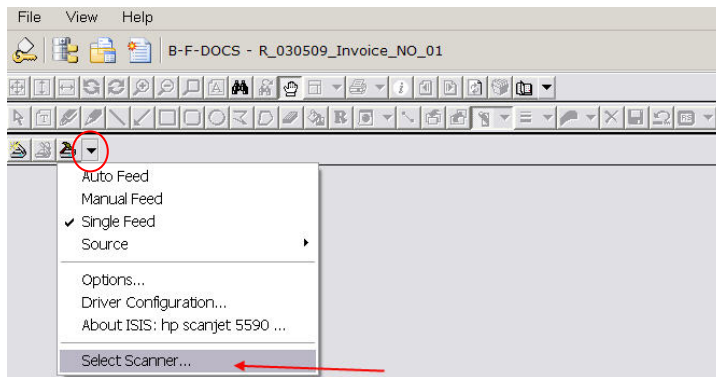
Batch Name\*: R\_030509\_Invoice\_NO\_01

Memo: Batch created at 2009-03-06 22:39:49

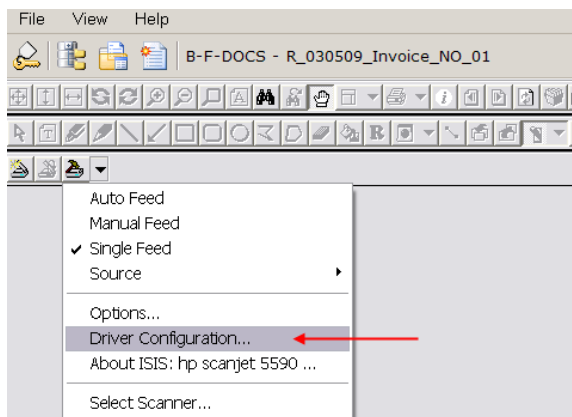
\*Required Fields  Thin client upload

Next Cancel Help

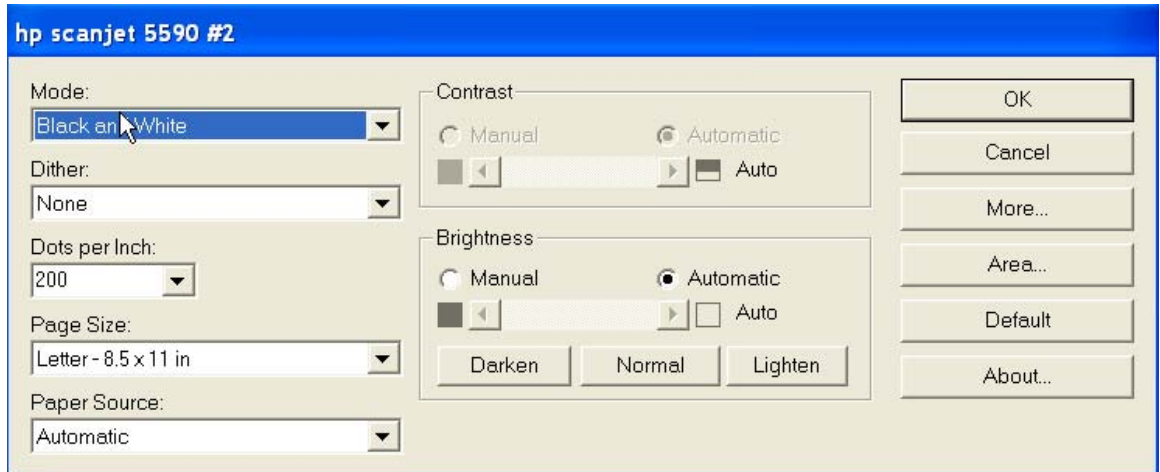
4. Load documents into the scanner document feeder, face up, with headers in the feeder first, or however your scanner directs.
5. If this is the first time you're using the software, click on the **Setup** drop-down arrow, shown below and choose a scanner for the software to use. Note: ISIS drivers are the standard, choose this option, if unavailable please contact your IT dept.



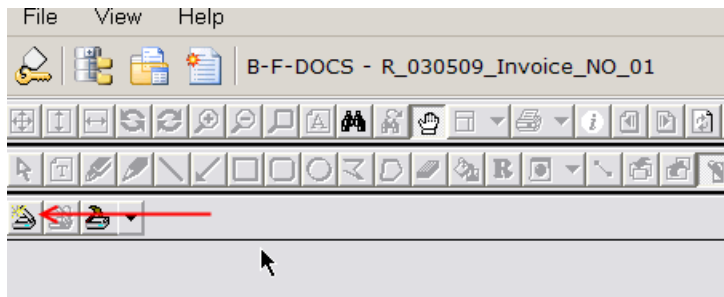
6. It is also a good idea to check your driver configuration if this is the first time you're scanning. Click on **Setup > Driver Configuration**, as shown below. This will bring up a screen specific to your scanner set up, so we will not show a screen shot of what this looks like. Check to make sure the mode of scanning is set to Black and White and that your DPI or Dots Per Inch is set to 200 or 300. This will ensure that Xtender works well with your documents.



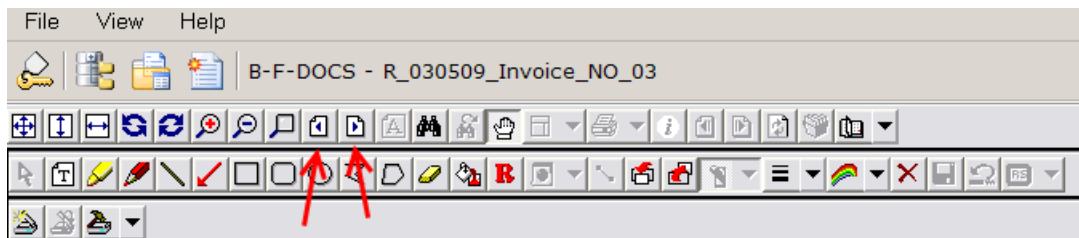
7. An example of what the driver configuration could look like is below.




8. After checking driver configuration click on the **Scan** button, shown below.

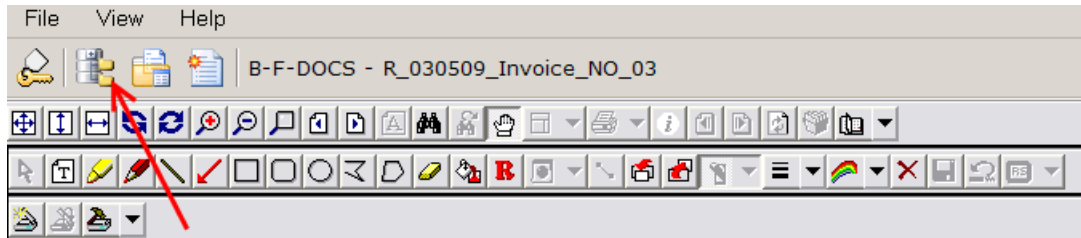


9. Scan the document according to your scanner instructions. Some scanners will require you to choose the feeder option, etc. This depends on the type of scanner you're using.
10. Close the scanner window or hit **Cancel** once the documents are finished scanning, if necessary. Some scanners will scan without bringing up a new window.
11. Scanned documents appear in Xtender. To review documents, use the **Previous Page or Next Page arrows**, shown below to see all pages and verify they have scanned correctly.



12. After reviewing the scanned documents, exit the page by clicking on the **Application list** icon, shown below.

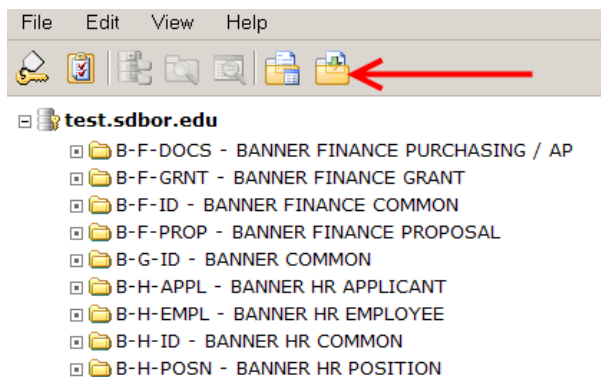
**Warning:** DO NOT close Xtender using the close  in the upper right-hand corner. If you do not use the **Application list** icon shown below, your batch could get stuck and need to be reset by RIS staff.



## Importing

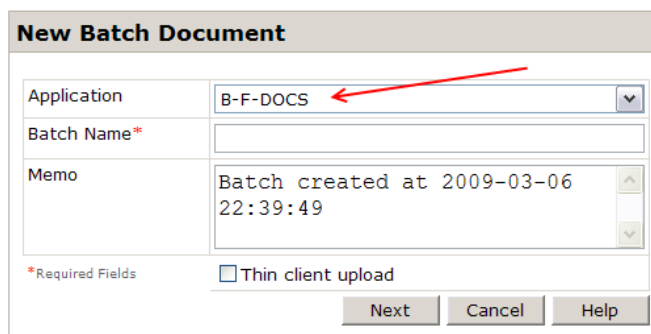
Xtender accepts documents in various formats – pdf, Word, Excel, html. Almost anything with text can be imported.

1. Click on **File > Batch Import**. OR click on the **Batch Import** icon as seen below.



Note: You may not see all of the above folders listed when you are logged in. The folders that you see are the folders you have access to. This particular screen shot shows folders for Finance as well as HR.

2. For our example: select B-F-DOCS in the **Application** drop-down menu as shown below.

A screenshot of the 'New Batch Document' dialog box. The dialog box has a title bar 'New Batch Document'. It contains a table with the following fields:

Application	B-F-DOCS
Batch Name*	
Memo	Batch created at 2009-03-06 22:39:49

A red arrow points to the 'Application' dropdown menu. Below the table, there is a checkbox labeled 'Thin client upload' which is currently unchecked. At the bottom of the dialog box, there are three buttons: 'Next', 'Cancel', and 'Help'. A small asterisk and the text '\*Required Fields' are located to the left of the 'Thin client upload' checkbox.



3. Name your batch according to Finance naming conventions as shown below.  
(Campus Identifier\_mmddyy\_Type of Document\_Your Initials\_Batch Number) and click **Next** as below.

**New Batch Document**

Application: B-F-DOCS

Batch Name\*: R\_030509\_Invoice\_NO\_01

Memo: Batch created at 2009-03-06 22:39:49

\*Required Fields  Thin client upload

Next Cancel Help

4. Xtender will come up. Click on the **Page Menu icon** (shown below, figure 1) > **New Page > Import File > Append.** (shown below, figure 2)

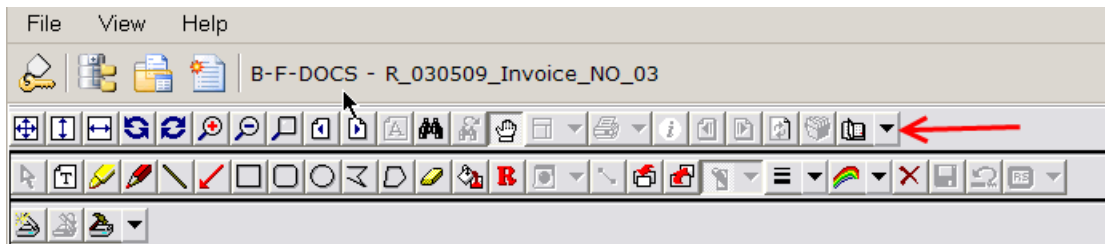


Figure 1

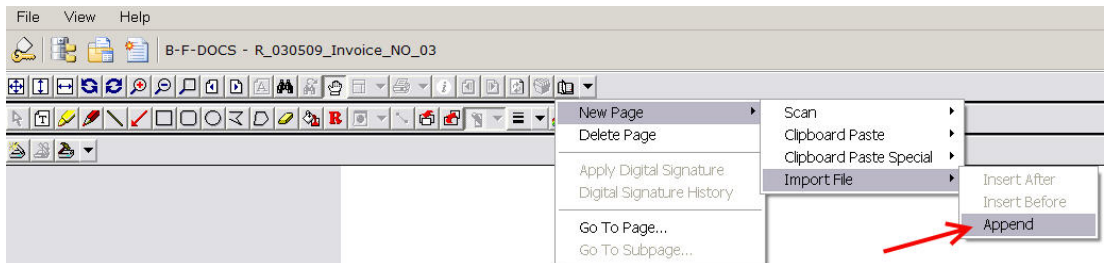
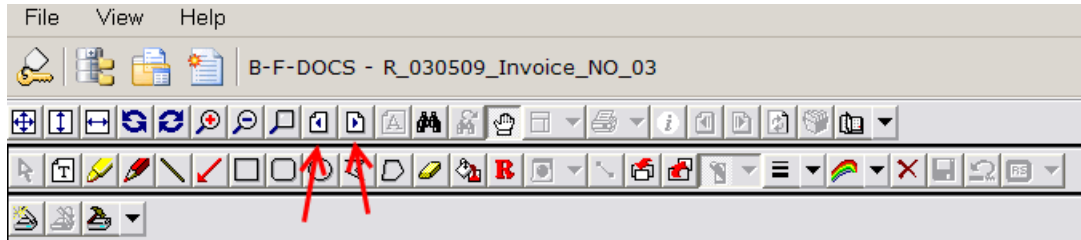



Figure 2

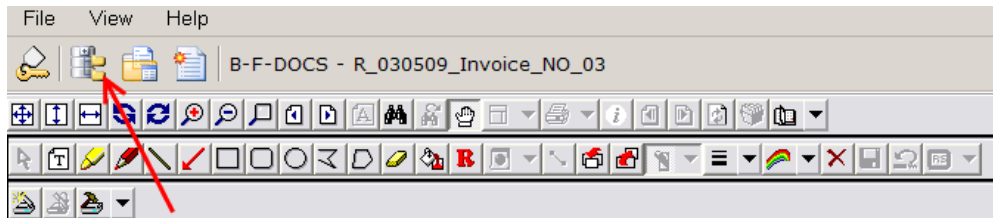
5. The **Import File** window will appear. Locate and select the file you wish to import from your computer.
6. Click on **Open**.

- Your document(s) will appear in the Xtender window. To review documents, use the **Previous Page or Next Page arrows**, as shown below to see all pages and verify they have imported correctly.



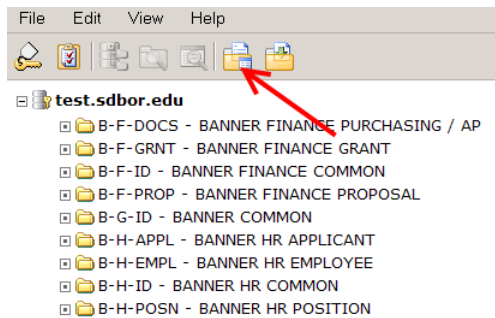
- After reviewing the imported documents, exit the page by clicking on the **Application List** icon, shown below.

**Warning:** DO NOT close Xtender using the close  in the upper right-hand corner. If you do not use the **Application list** icon shown below, your batch can get stuck and need to be reset by RIS staff.



## Indexing


- Open Xtender as we've discussed above.
- You can locate your batch by clicking on the **Batch List** icon, shown below. OR by clicking on **View > Batch Index (List)...**






- Pending batches will pop up in a new window.
- Choose the application you scanned your document(s) into earlier from the **Current Application** drop-down box, shown below. (In this case we will chose B-F-DOCS.)

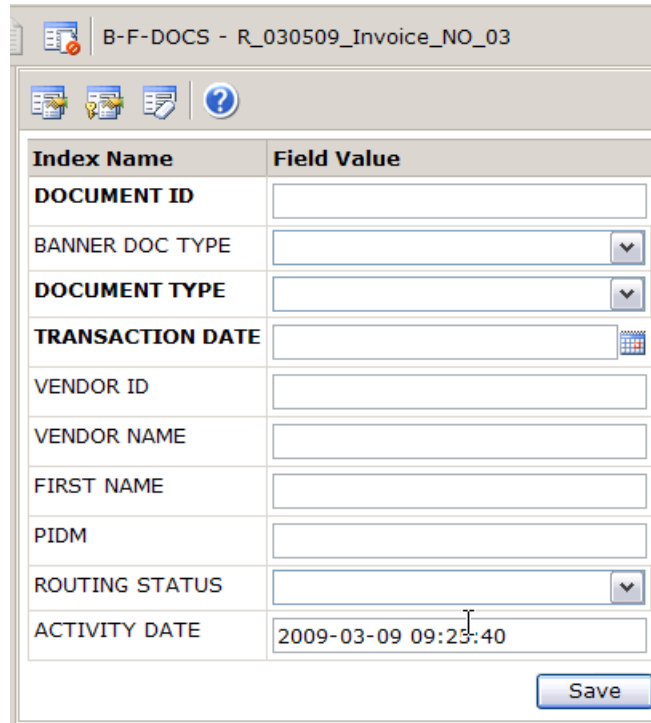
**Application Batch List**

—————> **Current Application** B-F-DOCS

- Batches are stored in date and time order. Move to the end of the batch list if needed by clicking  in the upper right corner of the window.
- Click on the **Document** icon, shown below; next to the batch name in order to access the batch for indexing.

<input type="checkbox"/>		R_030509_Invoice_NO_01
<input type="checkbox"/>		R_030509_Invoice_NO_02
<input type="checkbox"/>		R_030509_Invoice_NO_03

- The Indexing page automatically pops up and looks similar to the below.



Index Name	Field Value
<b>DOCUMENT ID</b>	<input type="text"/>
BANNER DOC TYPE	<input type="text" value="v"/>
<b>DOCUMENT TYPE</b>	<input type="text" value="v"/>
<b>TRANSACTION DATE</b>	<input type="text"/>
VENDOR ID	<input type="text"/>
VENDOR NAME	<input type="text"/>
FIRST NAME	<input type="text"/>
PIDM	<input type="text"/>
ROUTING STATUS	<input type="text" value="v"/>
ACTIVITY DATE	2009-03-09 09:23:40

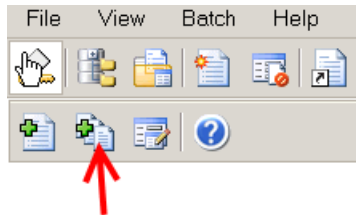
Save

- In the **Document ID** field, type the Document ID.
- Hit the **Tab** key on the keyboard and information pertaining to the document will auto-populate in the fields from Banner.  
NOTE: The page will reload once you hit tab.

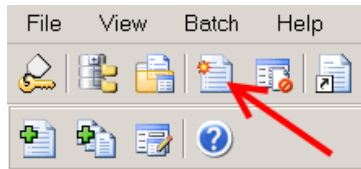
10. Click on the drop down arrow next to **Document Type** and select **Invoice**.

Index Name	Field Value
DOCUMENT ID	I0000056
BANNER DOC TYPE	INVOICE
DOCUMENT TYPE	INVOICE
TRANSACTION DATE	05-Jul-2006
VENDOR ID	A00003502
VENDOR NAME	
FIRST NAME	
PIDM	5864
ROUTING STATUS	
ACTIVITY DATE	2009-03-09 09:25:40

11. Click on the **Save** button. This will attach *only* the current page to the document chosen.
12. To attach additional pages, you can choose the **Attach Current Page** button, or **Attach All Pages** button, shown below to finish indexing your document.



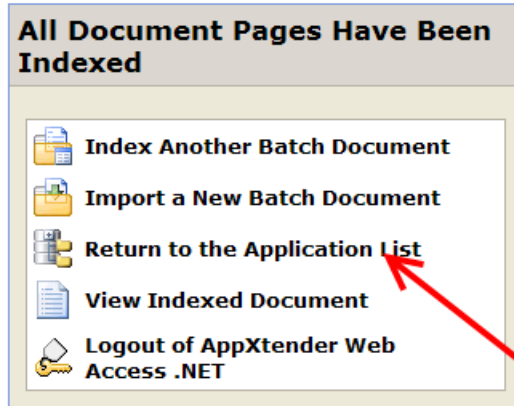
13. To attach additional pages, but to differ a different record, you must click the **New Document** button, shown below. Enter the new document ID in the Document ID field, and choose the new document type.




14. Click on the **Save** button.

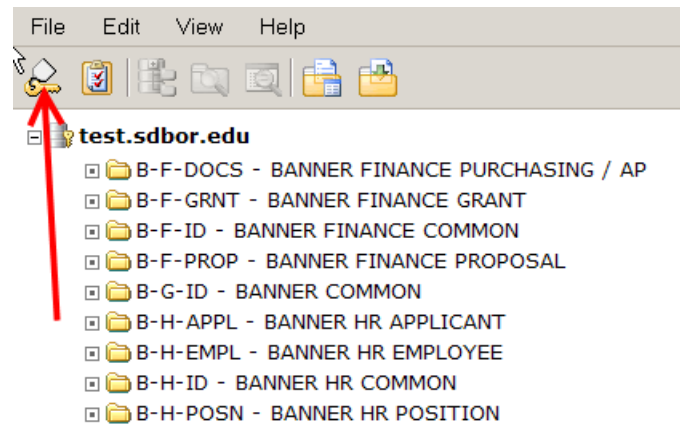
15. Once all batch pages have been attached to documents, you will receive a message that tells you all pages have been attached and the batch no longer exists.

Select the option that you would like to complete next. For this manual we will use **Return to the Application List**



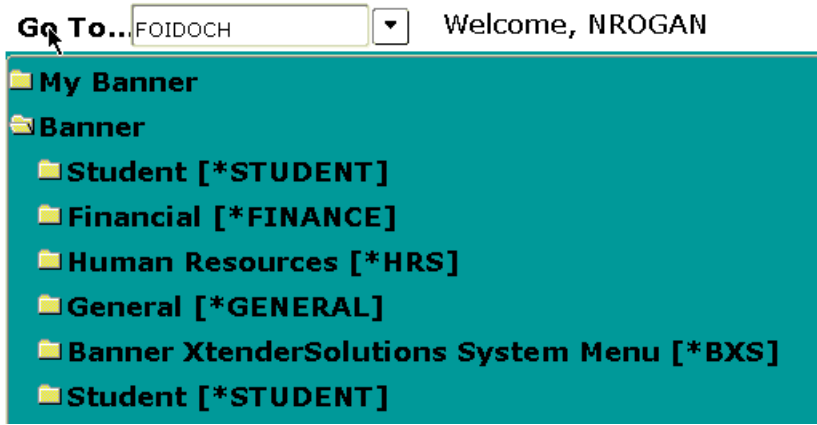
**Warning:** DO NOT close Xtender using the close  in the upper right-hand corner.

**Warning:** If you are on the Application list in Xtender, you must click **File > Logout** OR the Logout icon on the left side of the toolbar). **DO NOT** use the upper right hand corner X to close this screen! Once you logout, you will return to the login screen – you can use the upper right corner X to close this screen only.



## Verifying your Documents

1. To verify that all pages from the batch are now attached to Banner, go to the form in Banner needed to view the document. In this case, we will go to **FOIDOCH**.



2. Bring up the document type for the documents you've scanned.
3. Click on the Xtender icon as shown below.



4. You will see all documents that have been attached to FOIDOCH for that document ID. Click on the **Document** icon, shown below to view attachments.

**Document 1 - 2**

	ID
<input type="checkbox"/>	A00002
<input type="checkbox"/>	A00002

5. Verify that all documents have been attached.

## Adding additional pages to an already indexed file using Xtender

1. To *Import* additional pages, find your already indexed file in Xtender and open it by using the method we used to verify your documents.
2. Click on the **Page Menu icon** (shown below, figure 1) > **New Page** > **Import File** > **Append**. (shown below, figure 2)

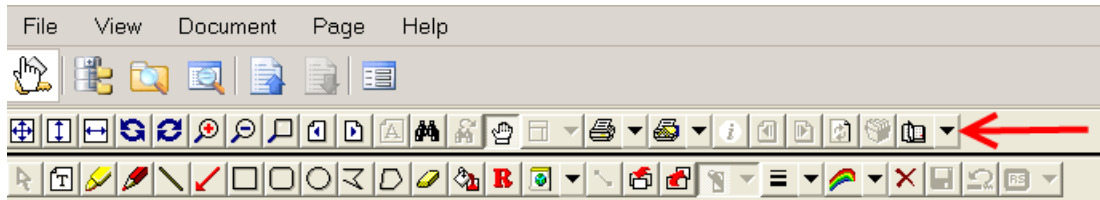


Figure 1

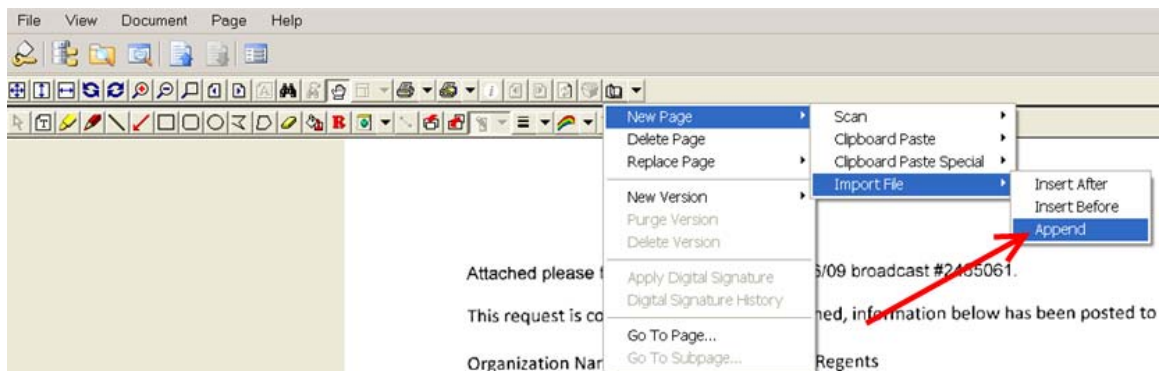


Figure 2

3. Locate the file to be imported and select **Open**.
4. After reviewing the imported documents, exit the page by clicking on the **Application List** icon.
5. To *Scan* additional pages, find your already indexed file in Xtender and open it by using the method we used to verify your documents.
6. Click on **Page** on the menu bar and select **Enable Scanning** from the menu, as shown below.



7. Click on the **Page Menu icon** (shown below, figure 1) > **New Page > Scan > Append**. (shown below, figure 2)

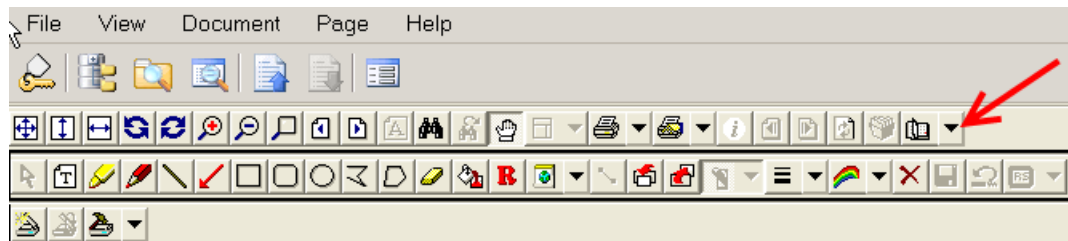


Figure 1

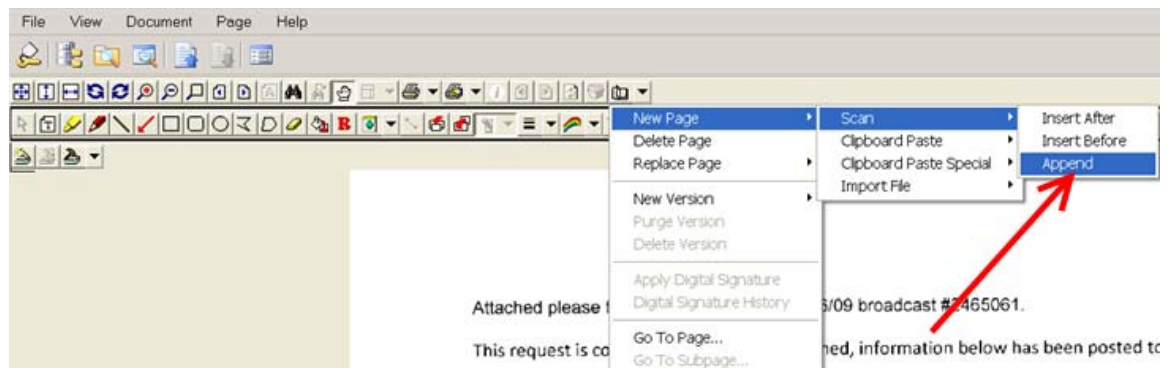



Figure 2

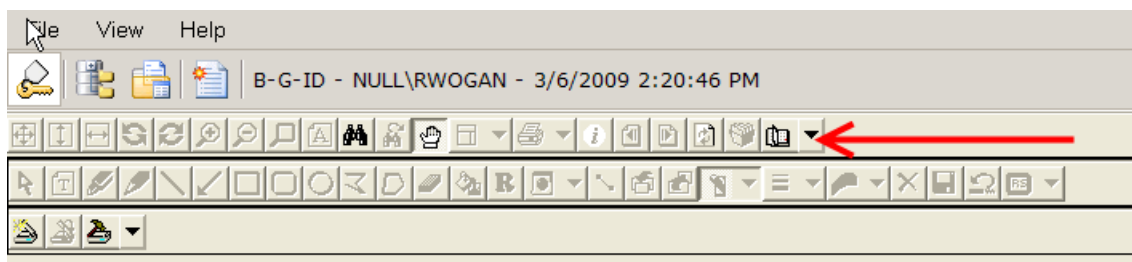
8. Scan or import documents as described earlier.
9. After reviewing the imported or scanned documents, exit the page by clicking on the **Application List icon**.




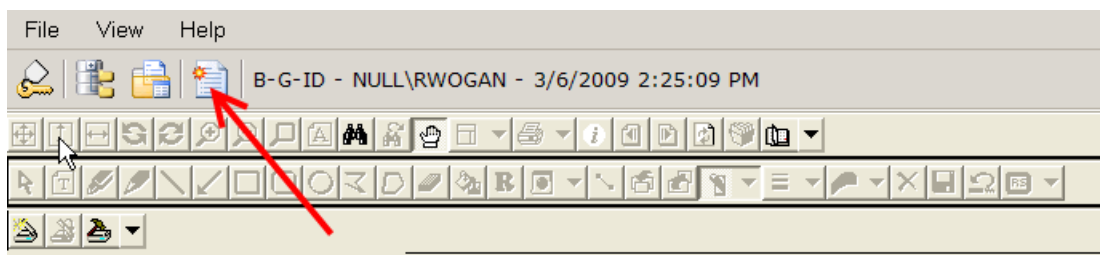
## Other Options: Using the button in Banner.

1. Clicking on the  button in Banner will open a Batch window, shown below and is a shortcut to import or scan documents into the Xtender system.

Once the Batch window loads use the **Page Menu** as described earlier to either import or scan documents as a batch.

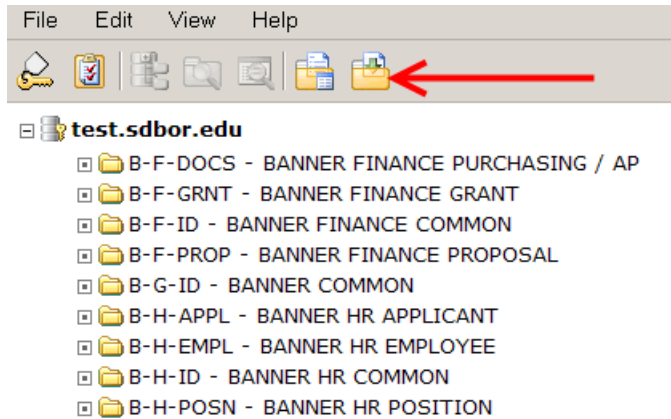


2. To index the document click on the **New Document** icon as shown below and follow indexing instructions described earlier in this manual. **Note:** If you do not choose to index the document now it, will be saved as a batch in the correct application based on the Banner screen you were in when clicking on . The batch name will list your username so that you can find it at a later date.



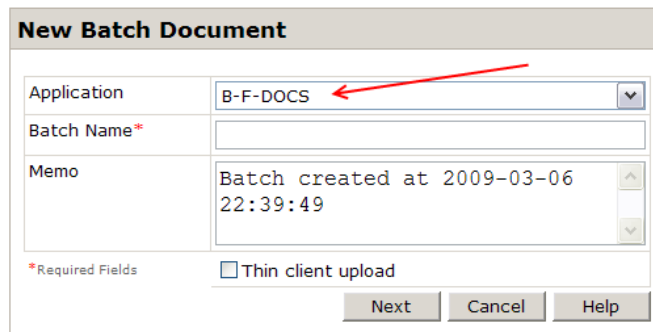
## Other Options: Copying and Pasting into Xtender from the “Clipboard”

1. Go to whatever application or document you would like to copy information from and highlight the information and hold the Ctrl key on your keyboard and press the letter “C” on your keyboard. This copies the selected information to your “Clipboard”.
2. Click on **File > Batch Import**. OR click on the **Batch Import** icon as seen below.



Note: You may not see all of the above folders listed when you are logged in. The folders that you see are the folders you have access to. This particular screen shot shows folders for Finance as well as HR.

3. For example: select B-F-DOCS in the **Application** drop-down menu as shown below.



The image shows a dialog box titled 'New Batch Document'. It has a table with the following fields:

Application	B-F-DOCS
Batch Name*	
Memo	Batch created at 2009-03-06 22:39:49

Below the table, there is a checkbox labeled 'Thin client upload' which is unchecked. At the bottom of the dialog, there are three buttons: 'Next', 'Cancel', and 'Help'. A red arrow points to the 'B-F-DOCS' selection in the Application dropdown menu.

- Name your batch according to Finance naming conventions as shown below. (Campus Identifier\_mmddyy\_Type of Document\_Your Initials\_Batch Number) and click **Next** as below.

**New Batch Document**

Application: B-F-DOCS

Batch Name\*: R\_030509\_Invoice\_NO\_01

Memo: Batch created at 2009-03-06 22:39:49

\*Required Fields  Thin client upload

Next Cancel Help

- Xtender will come up. Click on the **Page Menu icon** (shown below, figure 1) > **New Page > Clipboard Paste > Append.** (shown below, figure 2)

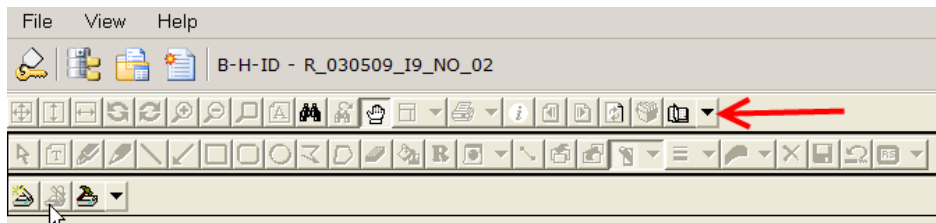


Figure 1

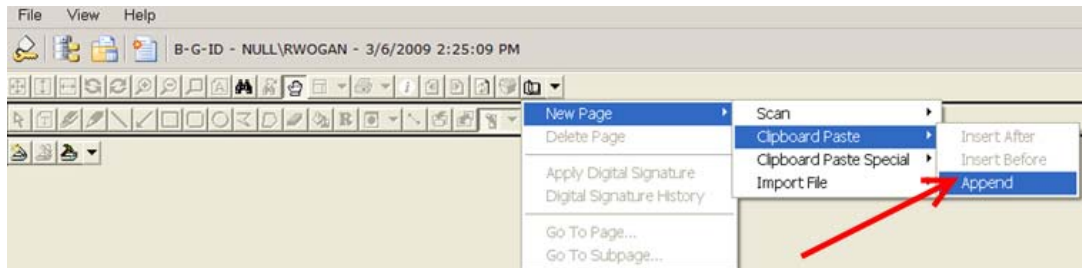


Figure 2

- Xtender will paste in the information that you copied in step 1.

Do you have questions about Xtender? Call Nicole Ogan, BOR Training & Development Manager at 605-773-3455 or email at [nicoleo@sdbor.edu](mailto:nicoleo@sdbor.edu).