



Xtender

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Xtender Introduction

Nancy Grassel
Kelli Shuman

Why Xtender?

- Paperless office
- Document availability
- Clear audit trail
- Consistency

Xtender Forms

- Document types tied to forms

- Naming Conventions
 - Consistency
 - Continuity
 - Metadata File

Security

- What can others see and/or do?
 - Scanning
 - Indexing
 - Annotating
- Forms/Setup

Where we are now

- Documents to be scanned
- Where to index
- Naming conventions



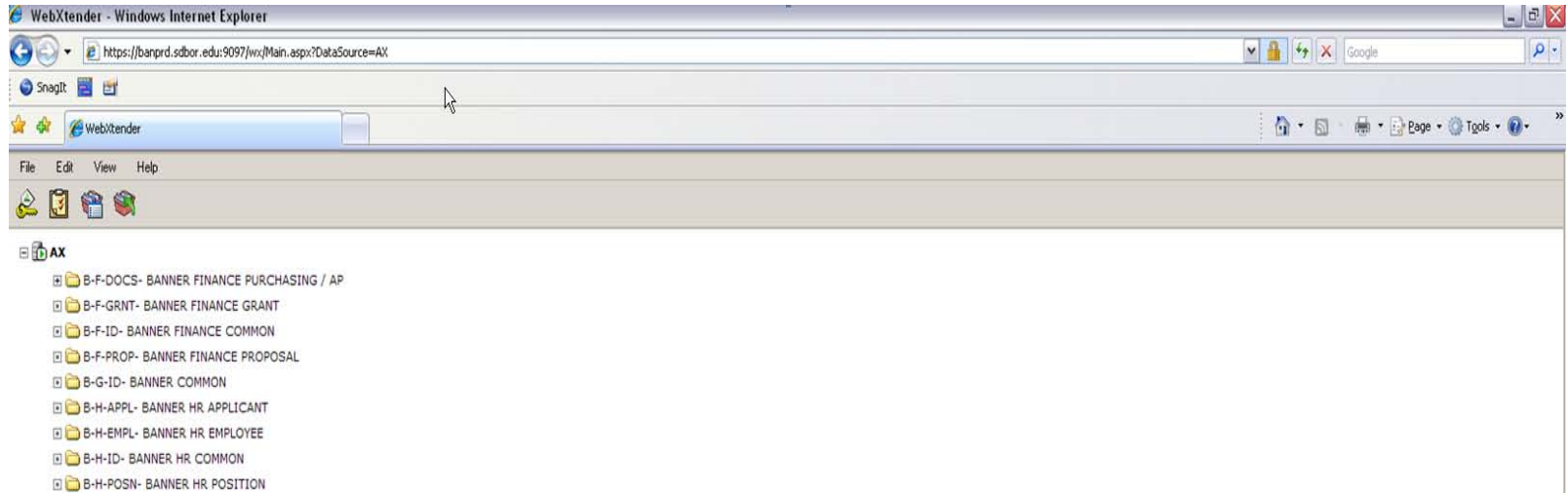
Navigating Xtender

Ryan Ogan

Logging In

- Through Banner single sign on
- Through SNAP direct link to Xtender

Applications List



Batch Importing

- Different Options
 - Scanning
 - Importing
- Naming Scheme for Batches
 - Campus code_date_document type_user initials_batch number for the day
- Annotations
 - Overlaying annotations on documents
 - Redactions

Batch Importing

Index Name Field Value

ID

PIDM

DOCUMENT TYPE

LAST NAME

FIRST NAME

SSN

BIRTH DATE

ROUTING STATUS

ACTIVITY DATE 2008-04-25 16:23:53

Save

```
# THOMAS.ORA Network Configuration File: C:\oracle\ora92\network\admin\tnames.ora
# Generated by Oracle configuration tools.

PROD.SDBOR.EJ2 =
  (DESCRIPTION =
    (ADDRESS_LIST =
      (ADDRESS = (PROTOCOL = TCP) (Host = 206.176.16.122) (Port = 9022))
    )
    (CONNECT_DATA =
      (SID = PROD)
    )
  )

OOSP.SDBOR.EJ2 =
  (DESCRIPTION =
    (ADDRESS_LIST =
      (ADDRESS = (PROTOCOL = TCP) (Host = 206.176.16.122) (Port = 9023))
    )
    (CONNECT_DATA =
      (SID = OOSP)
    )
  )

OOST.SDBOR.EJ2 =
  (DESCRIPTION =
    (ADDRESS_LIST =
      (ADDRESS = (PROTOCOL = TCP) (Host = 206.176.30.75) (Port = 1522))
    )
    (CONNECT_DATA =
      (SID = OOST)
    )
  )

PPRD.SDBOR.EJ2 =
  (DESCRIPTION =
    (ADDRESS_LIST =
      (ADDRESS = (PROTOCOL = TCP) (Host = 206.176.30.3) (Port = 1522))
    )
    (CONNECT_DATA =
      (SID = PPRD)
    )
  )

TWNS.SDBOR.EJ2 =
  (DESCRIPTION =
    (ADDRESS_LIST =
      (ADDRESS = (PROTOCOL = TCP) (Host = 206.176.30.3) (Port = 1522))
    )
  )
```

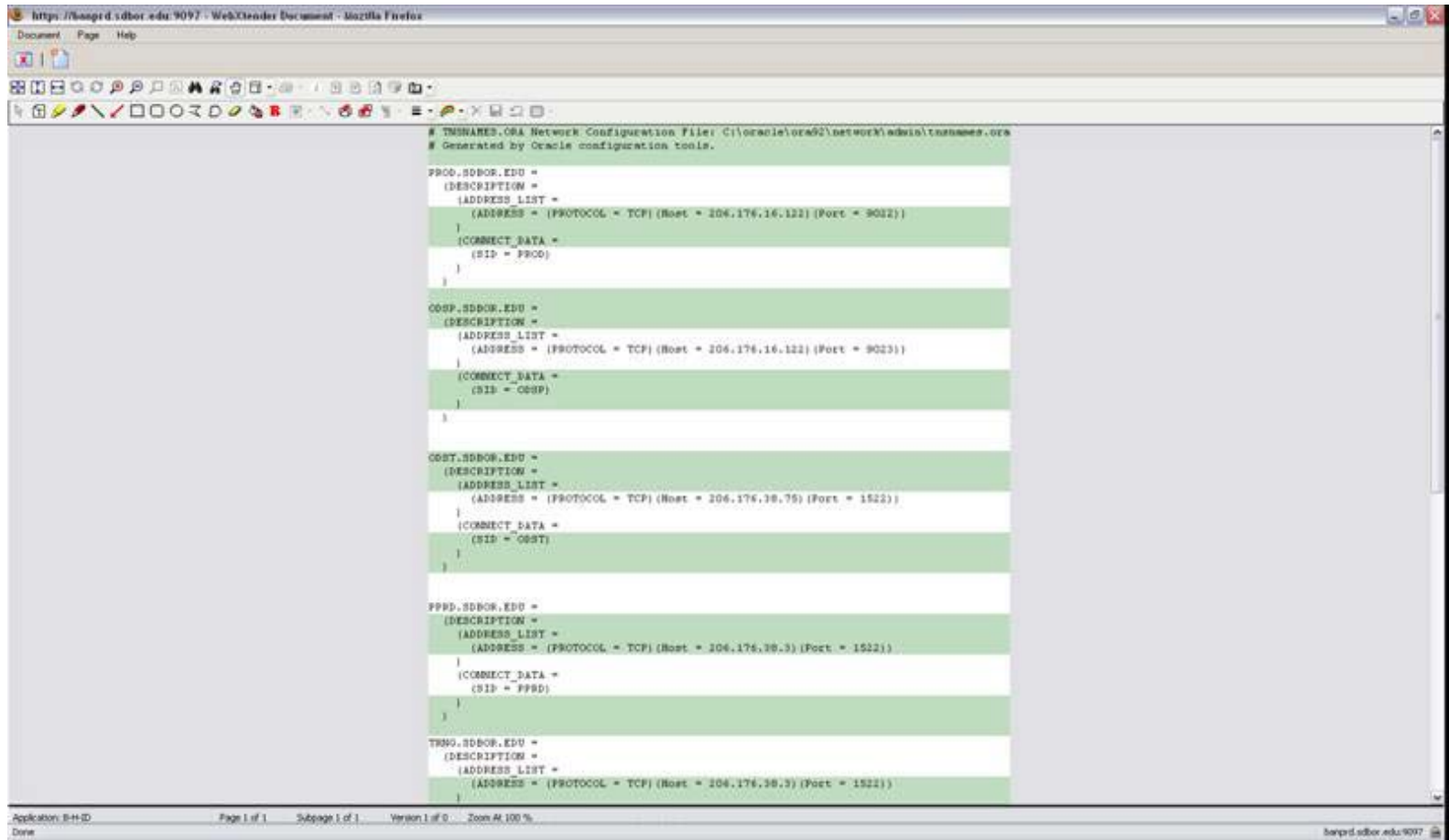
Application: B4H-ID Page 1 of 1 Subpage 1 of 1 Version 1 of 0 Zoom At 100%

http://sdbor.edu:9097

Batch Indexing

- Finding your batch
- Adding batch to Banner document
 - Filling in index information
 - Document Types
 - Annotations/redactions as necessary

Annotations/Redactions



```
# TNSNAMES.ORA Network Configuration File: C:\oracle\ora92\network\admin\tnsnames.ora
# Generated by Oracle configuration tools.

PROD.SDBOR.EDU =
  (DESCRIPTION =
    (ADDRESS_LIST =
      (ADDRESS = (PROTOCOL = TCP) (Host = 206.176.16.122) (Port = 9022))
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    (CONNECT_DATA =
      (SID = PROD)
    )
  )

OOSP.SDBOR.EDU =
  (DESCRIPTION =
    (ADDRESS_LIST =
      (ADDRESS = (PROTOCOL = TCP) (Host = 206.176.16.122) (Port = 9023))
    )
    (CONNECT_DATA =
      (SID = OOSP)
    )
  )

OOST.SDBOR.EDU =
  (DESCRIPTION =
    (ADDRESS_LIST =
      (ADDRESS = (PROTOCOL = TCP) (Host = 206.176.38.75) (Port = 1522))
    )
    (CONNECT_DATA =
      (SID = OOST)
    )
  )

FPRD.SDBOR.EDU =
  (DESCRIPTION =
    (ADDRESS_LIST =
      (ADDRESS = (PROTOCOL = TCP) (Host = 206.176.38.3) (Port = 1522))
    )
    (CONNECT_DATA =
      (SID = FPRD)
    )
  )

TRNG.SDBOR.EDU =
  (DESCRIPTION =
    (ADDRESS_LIST =
      (ADDRESS = (PROTOCOL = TCP) (Host = 206.176.38.3) (Port = 1522))
    )
  )
```

Application: B-H-ID Page 1 of 1 Subpage 1 of 1 Version 1 of 0 Zoom At 100 % Done

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Querying

- Running queries from Xtender
 - Saving queries
- Running queries from Banner
 - Can query from many different screens

Context Rules

- Banner Context Determination Form

The screenshot displays the Oracle Developer Forms Runtime interface for the 'EXABCXT' application. The main window title is 'Oracle Developer Forms Runtime - Web: Open > EXABCXT'. The browser address bar shows 'BXS Context Determination Form EXABCXT: 7.0 (PROD)'. The 'Form Name or Pattern' is set to 'PPAIDEN' and the form type is 'Identification Form'.

The left pane shows a tree view of the form structure:

- PPAIDEN (Identification form)
 - id (ID)
 - spbpers
 - spbpers_citz_code
 - DOCTYPE: PROOF OF CITIZENSHIP
 - id (ID)
 - spbpers_dead_ind
 - Y
 - DOCTYPE: DEATH CERTIFICATE
 - id (ID)
 - spraddr
 - DOCTYPE: NAME/ADDRESS CHANGE** (highlighted)
 - id (ID)
 - spriden_current
 - ssn
 - DOCTYPE: SSN CARD
 - id (ID)

Context / Parameter Rules Activity

Form Context

Form: PPAIDEN Item:

Block: SPRADDR Item Value:

Associated ApplicationXtender/WebXtender Settings

Application Name: B-H-ID Saved Query:

Document Type: NAME/ADDRESS.CHANGE

Context Search Criteria

Banner Item Field Name	XtenderSolutions Index Field Name
ID	ID
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Document Types

Oracle Developer Forms Runtime - Web: Open > ETVDTYP

File Edit Options Block Item Record Query Tools Help

BXS Document Type Validation Form ETVDTYP 7.0.1 (PROD)

Document Type Code	Description	Baseline Data	User ID	Activity Date
401K FORMS	401K Forms, Checks and Amortization Schedules	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
ACCEPTANCE LETTER	Acceptance Letter	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
ADMISSIONS APP	Admissions Application	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
ADMISSIONS REGS	Admissions Requirements	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
AGENCY NOTES	Agency Notes	<input type="checkbox"/>	BANMGR	16-MAY-2006
ALIEN REG CARD	Alien Registration Card (Green Card)	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
APPLICANT INFO	Applicant Information	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
APPLICATION FORM	Application Form	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
APPLICATION INFO	Application Information	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
ATTENDANCE ROSTER	Attendance Roster	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
AWARD ACCEPTANCE	Award Acceptance	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
AWARD OFFER LETTER	Award Offer Letter	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
BENEFIT BACK-UP DOCS	Birth/Marriage Certificates, Family Change Forms, Insurance Claims	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
BENEFIT FORMS	Enrollment Forms, Medical and Dental Forms, Benefits Confirmation and Statements	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
BROKERAGE STMT	Brokerage Statement	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
CERTIFICATIONS	Certifications	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
CHARITABLE CONT	United Way Donations	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
CHECK	Check	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
CLASS ROSTER	Class Roster	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
COBRA FORMS	Termination Letters, Continue Medical Benefits for 18 months	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
COLLEGE TRNSCRIPT	College Transcript	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
CONFIDENTIAL PAPERS	Papers for Employee Disciplinary Action	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006
CONTACT FORM	Contact Form	<input checked="" type="checkbox"/>	BANMGR	16-MAY-2006

Document Type Code As Used in XtenderSolutions; Must be Unique.

Record: 1/7 | ... | <OSC>