Synchronize an Xtender Password to a Banner Password

ApplicationXtender Web Access (WX)

and

ApplicationXtender Document Manager (AX)

If you are an Xtender user who routinely views imaged documents through Banner, it is possible to synchronize your Xtender and Banner passwords. This allows you to view imaged documents directly from Banner, without stopping to log into Xtender separately.

Follow these steps to synchronize your passwords the first time you log into Banner after you get an Xtender account, *or* whenever your Banner password changes:

1. Log into the Enterprise **VPN**.

2. Log into **Banner**.
   Note: You must do separately this for each Banner database you have access to (i.e., PROD, SETI, BPRD, BTST). Select the appropriate database.

3. From any Banner form, click the **BDM – Display Document** button (magnifying button) on the Banner toolbar.

4. If your Xtender password did not match your Banner password, you may (or may not) see a message that your passwords have been synchronized. Passwords are synchronized <u>even if you don't see the message</u>.
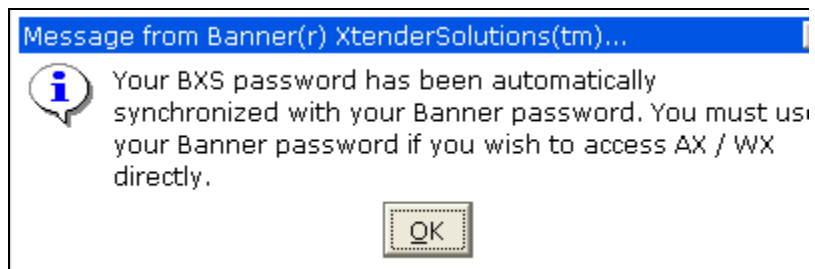
   If you do see this message, click **OK** to acknowledge it.
   Note: If you see an hourglass instead of an arrow for your cursor, move your cursor over the synchronization message. The cursor should become an arrow again.

5. After the passwords are synchronized, the system opens another browser window to log you into Xtender.

6. You may see a message saying "No records found" or "Permission denied to B-G-ID". Or, you could see a screen with a list of documents. These are all normal outcomes –

what you see depends on the Banner form you were on. That's fine. Your password has been synchronized in all of these cases. Acknowledge any messages.

7. Log out of Xtender.

8. Log out of Banner.

9. That's it. Your Xtender password now matches your Banner password and if you ever need to log into Xtender directly (rather than through Banner), the user name is your ITID, and the password is this Banner password.

Change your Xtender Password

ApplicationXtender Web Access (WX)

and

ApplicationXtender Document Manager (AX)

For Banner XtenderSolutions users, the easiest way to change your Xtender password is through Banner. Making the change through Banner will automatically match your Xtender password to your current Banner password. For more information, refer to the user documentation titled "Synchronize an Xtender password to a Banner password".

If you do not use Banner and Xtender together, use the steps below to change your Xtender password:

1. Log into ApplicationXtender (Web Access or Document Manager, whichever you typically use).

2. On the application list, **right-click** the database name (for example, PROD, BPRD, PHAT, BTST) and select **Change Password** from the menu.

3. The Change Password box appears.

4. In the **Current Password** field, enter your current Xtender password.

5. In the **New Password** field, enter a new Xtender password.

6. In the **Confirm New Password** field, enter the same new Xtender password that you entered in the previous step.

7. Click the **OK** button.

8. Click through the acknowledgement messages.

9. Log out of ApplicationXtender.
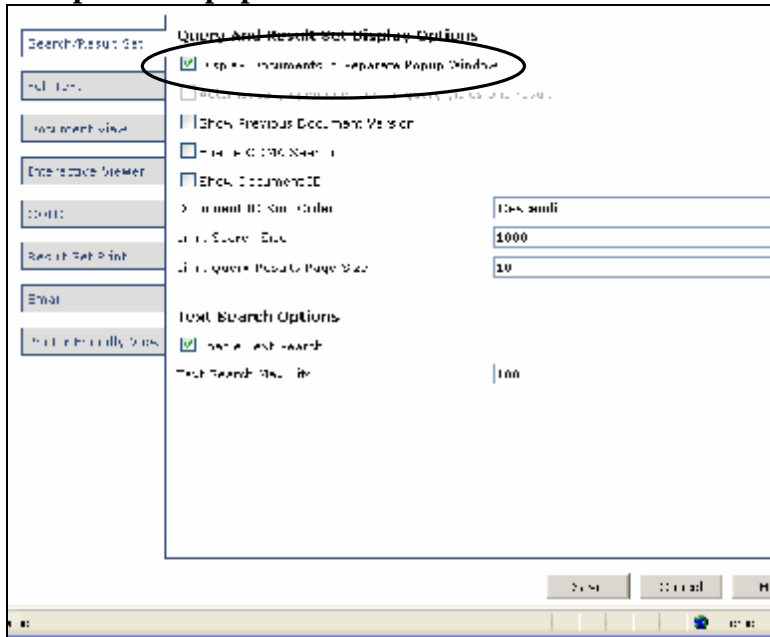
View more than one document at a time

ApplicationXtender Web Access (WX)

1. Log into ApplicationXtender Web Access.
   Note: Log into the database where you wish to make the change (for example: PHAT, BTST, BPRD, PROD).

2. Click the **View/Modify User Settings** button.
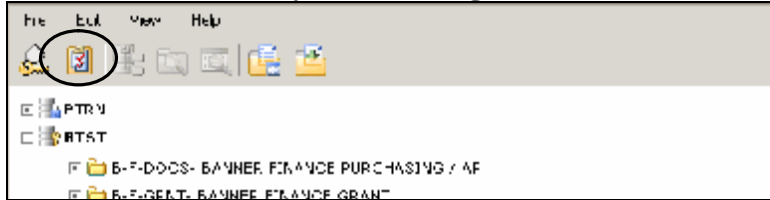
3. On the **Search/Result Set** tab, click the **Display Documents in Separate Popup Window** checkbox to select it.

   This will allow you to open multiple documents within one session of Xtender. When this checkbox is not selected, Xtender displays one document at a time, in the same window.

4. Click the **Save** button.

5. Log out of Xtender.

Define your User Settings

The User Settings button allows you to control the way documents are retrieved, displayed, exported, and printed in Xtender. The changes you make to your settings will not affect other users.

ApplicationXtender Web Access (WX)

To change your settings:

1. From the Application List screen, click the **User Settings** button on the toolbar.

2. On the **Search/Result Set tab**:
    * Select the **Display Documents in Separate Popup Window** checkbox
    * Set **Limit Search Size** to **200**
    * Set **Limit Query Results Page Size** to **100**

3. On the **Interactive Viewer** tab:
    * Select the **Enable Interactive Viewer** checkbox
    * Select the **Use Keyview To Display Foreign Files** checkbox

4. On the **COLD** tab:
    * In the COLD Options section,
        a. Select **Image** in the **Default View COLD Form Overlay** drop-down box
        b. Select **Image** in the **Default Print COLD Form Overlay** drop-down box
    * In the Color Bars section,
        a. Unselect the **Show Color Bars** checkbox

5. Make changes to any of the other tabs, as desired.

6. To save your settings, click the **Save** button.

Define your User Settings

ApplicationXtender Document Manager (AX)

The Configuration button allows you to control the way documents are retrieved, displayed, exported, and printed in Xtender. The changes you make to your settings will not affect other users.

To change your settings:

1. Click the **Configuration** button on the toolbar.

2. Make changes to any of the tabs, as necessary.

   Recommended settings (others can be set according to your preference):

   - **View tab**:
     Select the **Use KeyView to display foreign files** checkbox

   - **COLD tab**:
     In the **Form Overlay Settings** section, select the **Image** radio button for both **Screen** and **Printer**.

     In the **Default Color Bar Settings** section, **unselect** the **Show** checkbox.

3. To save your settings, click the **Save** button.