

Getting Started with Xtender

ApplicationXtender Web Access (WX)

New to document imaging and the Xtender software?

Use this checklist to get started:

- .. Adjust your pop-up blockers
- .. Change your Xtender password
- .. Log into Xtender
- .. Install components of the Xtender software on your computer
- .. Adjust user settings

You'll find step-by-step instructions for each of these tasks further down in this document.

Or... are you already using Xtender and you just have a new computer? If so, use this checklist to get your new computer ready to use with Xtender:

- .. Adjust your pop-up blockers
- .. Install components of the Xtender software on your computer

Looking for more information? Here are some more resources:

- .. Xtender documentation on the USNH Gateway webpage
<http://www.usnhgateway.org/> >> Documentation >> Xtender
- .. Xtender articles on the UNH IT Knowledge Base
<https://unh.edu/it/kb/> (search Xtender)
- .. Xtender training class through UNH IT
<http://it.unh.edu/> >> Software >> Training

Turn off pop-up blockers

Xtender uses pop-up windows to display information. If you find that you are not able to see a window, you may need to turn off or adjust your pop-up blocker.

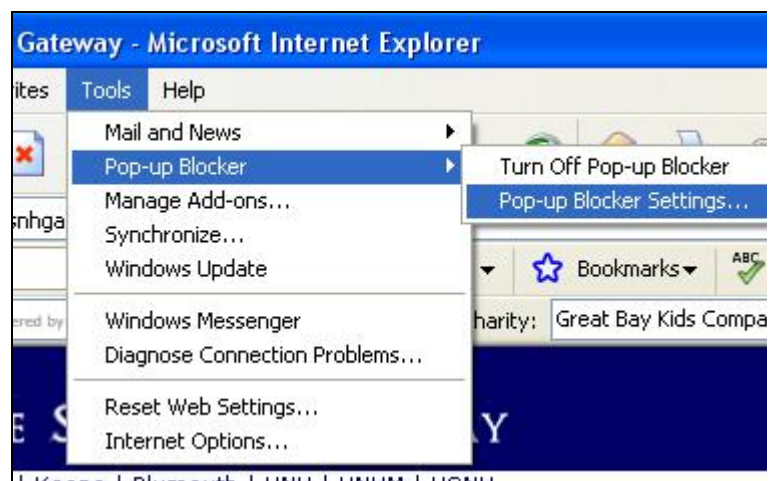
Internet Explorer has a pop-up blocker, but that may not be the only one at work. If you have search toolbars on your computer, you may need to turn off those pop-up blockers as well.

Instructions for adjusting the settings of the Internet Explorer pop-up blocker, as well as turning off pop-up blockers on two of the more popular toolbars, Google and Yahoo, are provided below.

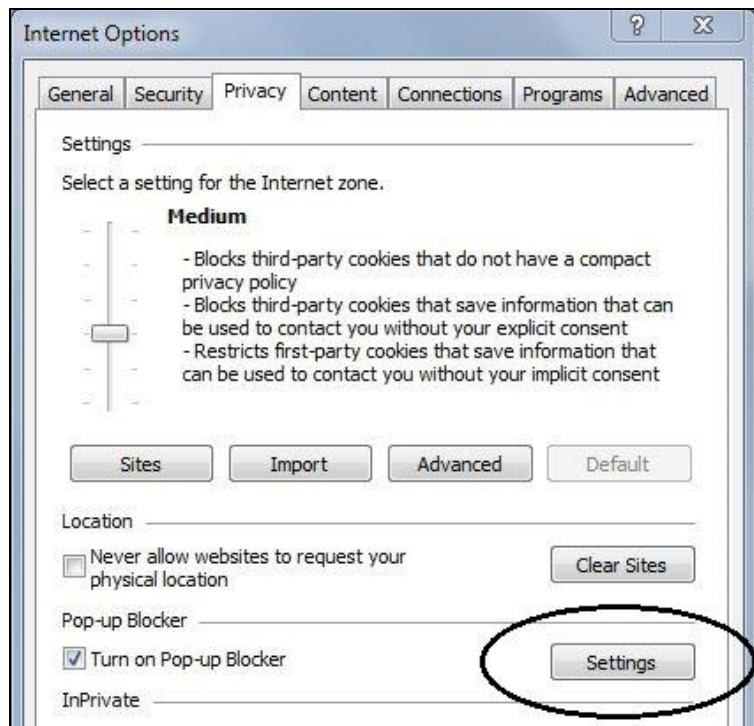
Internet Explorer

In Internet Explorer, it is possible to simply turn off the pop-up blocker, or leave the pop-up blocker on and specify which pop-ups are ok (such as the ones from Banner). The instructions below show you how to specify which pop-ups to allow.

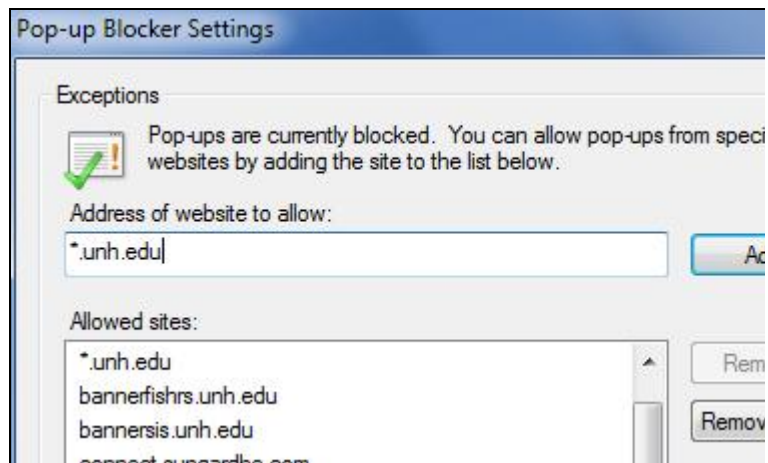
1. In **Internet Explorer 8**:
Follow the menu path: **Tools >> Pop-up Blocker >> Pop-up Blocker Settings**



2. In **Internet Explorer 9 and above**:
Click the **Tools** button. Select **Internet Options**.
Select the **Privacy** tab. Click the **Settings** button.



3. In the **Address of Web site to allow** field, enter ***.unh.edu**.



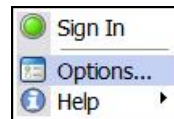
4. Click the **Add** button.
5. Click the **Close** button.

Google

1. Click on the down arrow on the **Settings** button



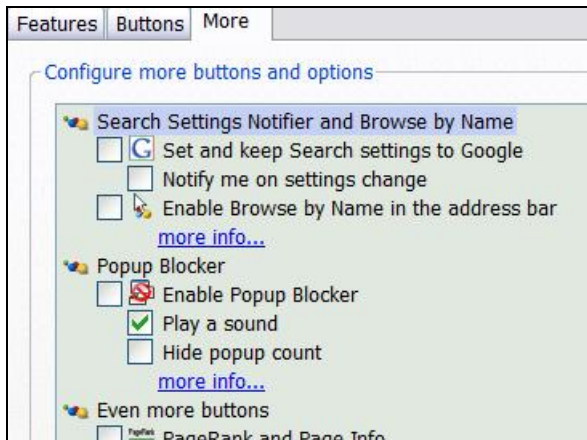
2. From the drop-down list, select **Options**



3. From the Toolbar Options screen, select **more...**

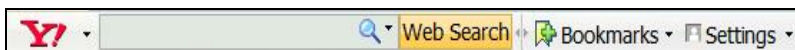


4. In the Popup Blocker section, unselect the **Enable Popup Blocker** checkbox.

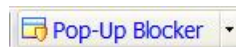


5. Click **Okay**

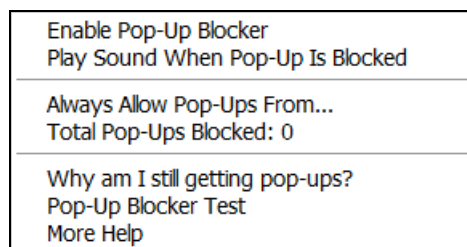
Yahoo



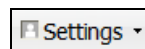
1. Click on the **Pop-Up Blocker** toolbar button down arrow



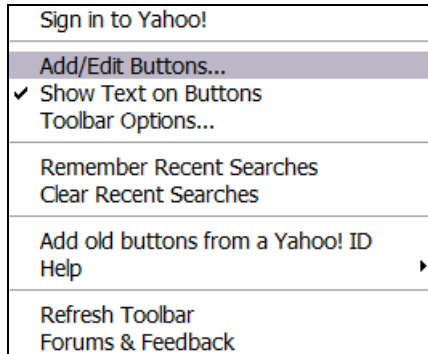
2. Uncheck the **Enable Pop-Up Blocker** line if checked
Note: A visual way of checking: If the button is yellow, it's enabled. If it's gray, the pop-up blocker is disabled.



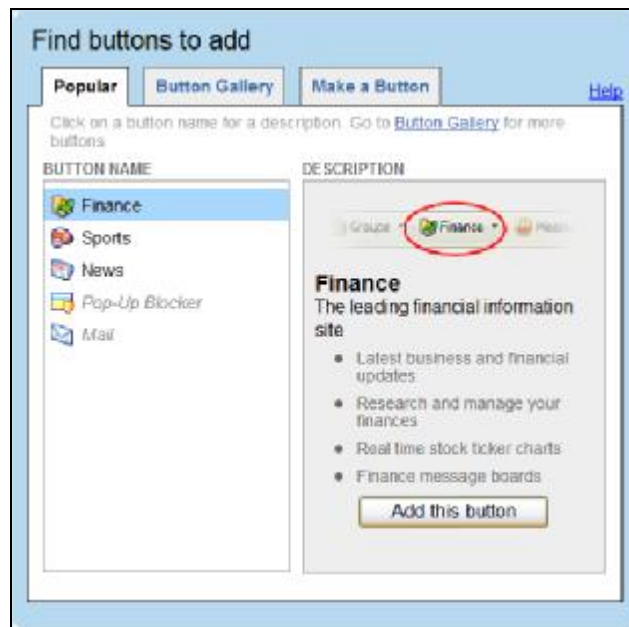
3. If you do not see the Yahoo Pop-Up Blocker toolbar button, click the **Settings** toolbar button.



4. Highlight the **Add/Edit Buttons...** line



5. Click on the **Pop-Up Blocker** name and then click on **Add this button** and got to Step 1 to verify if it's disabled.



Change your password

When your Xtender account is created, it is set up with a temporary password. It is important that you change it to something more secure. You can do that manually or by synchronizing it to your Banner password.

Banner users: You can change your Xtender password manually if you want to, but the easiest way to change your Xtender password is through Banner. Making the change through Banner will automatically synchronize your Xtender password to your current Banner password. You don't even need to know what your Xtender password is.

NON-Banner users: If you are a new user or have forgotten your Xtender password, contact the IT Service Desk (862-4242). If you already know your Xtender password, refer to the instructions further down in this document to manually change it.

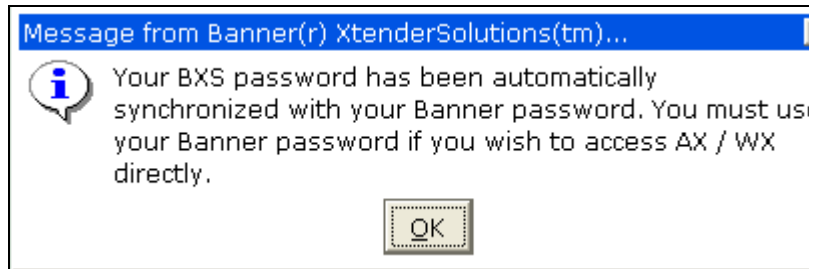
Synchronize your password to Banner

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. Navigate to a Banner form that you typically use.
4. Click the **BDM – Display Document** button (magnifying button) on the Banner toolbar.



5. If your Xtender password did not already match your Banner password, you may (or may not) see a message that your passwords have been synchronized. Passwords are synchronized even if you don't see the message.



If you do see this message, click **OK** to acknowledge it.

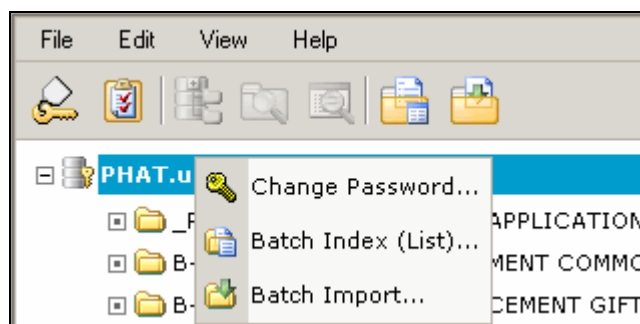
Note: If you see an hourglass instead of an arrow for your cursor, move your cursor over the synchronization message. The cursor should become an arrow again.

6. After the passwords are synchronized, the system opens another browser window and logs you into Xtender.
7. You may see a message saying “Permission denied to B-G-ID” or “No records found”. Or, you could see a screen with a list of documents. These are all normal outcomes – what you see depends on which Banner form you were on. That’s OK. Your password has been synchronized in all of these cases. Acknowledge any messages.
8. Log out of Xtender.
9. Log out of Banner.
10. 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 password manually

If you are **not a Banner user** (or you just want to manually change your password), use the steps below to manually change your Xtender password:

1. Log into **ApplicationXtender**.
See the “Log into Xtender” section of this Getting Started document for instructions on logging in, if necessary.
2. On the application list, **right-click** the database name (for example, PROD, BPRD, XPRD, SETI, BTST, PHAT) and select **Change Password** from the menu.



3. The Change Password box appears.
4. In the **Current Password** field, enter your current Xtender password.

Note: If you are a new Xtender user and do not have a current password – or if you have forgotten your password – contact the UNH IT Service Desk at 862-4242.

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.

Log into Xtender

Most users use the web version of Xtender to eliminate the need to install and maintain software on the computer. Although it is accessed through the internet, Xtender is available only to USNH users who have the appropriate VPN and Xtender accounts.

To log into ApplicationXtender:

1. Log into the Enterprise **VPN**.
2. Open **Internet Explorer** and go to the **USNH Gateway** page:
<http://www.usnhgateway.org/>.
3. Follow the menu path: **Production Systems >> Application Xtender Web Access** and select the appropriate database.
4. In the **Data Source** drop-down field, confirm that the correct database appears. Change, if necessary.
5. In the **User Name** field, enter your user name.
Note: This is typically your ITID.
6. In the **Password** field, enter your password.
7. Click the **Login** button.
8. ApplicationXtender opens.

Install Xtender Web Components

There are two ways to install the web components that Xtender requires in order to work correctly. The quickest way to install the Xtender web components is to use an installer, available from a UNH network folder. If you are not able to access this network folder, you can still install the components manually. (instructions below)

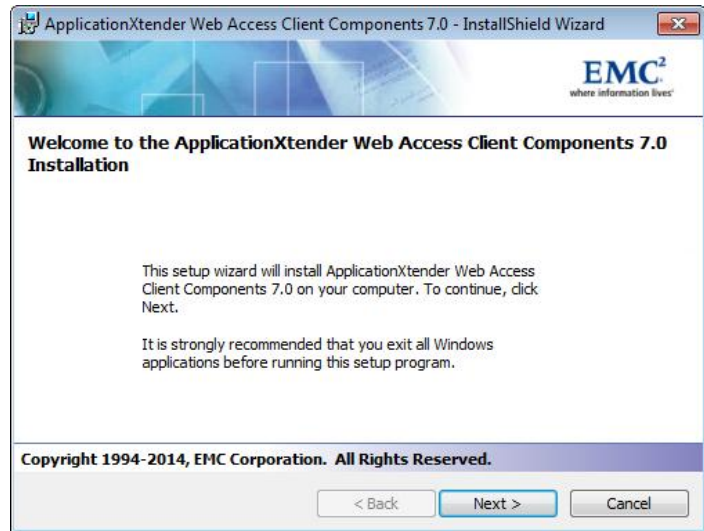
To install the Xtender components with the installer, follow these steps.

Note: You must have administrative rights to your machine.

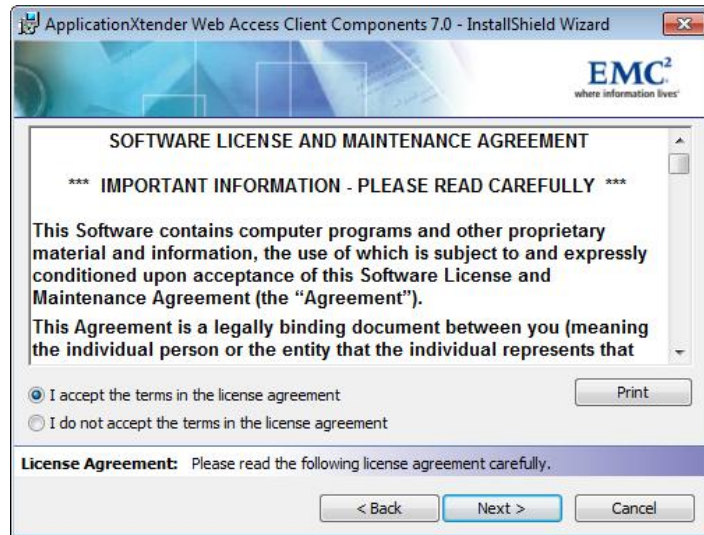
1. Log into the Enterprise **VPN**.
2. Open the following network folder:
[\\ecglib.unh.edu\public\\$\AX\7sp1\WebAccessClientComponents\7sp1](\\ecglib.unh.edu\public$\AX\7sp1\WebAccessClientComponents\7sp1)
3. Copy the **ApplicationXtender Web Access Client Components 7.0** file to your desktop and run it from there. This is the installer which will install the Xtender web components.
4. Click the **Run** button.



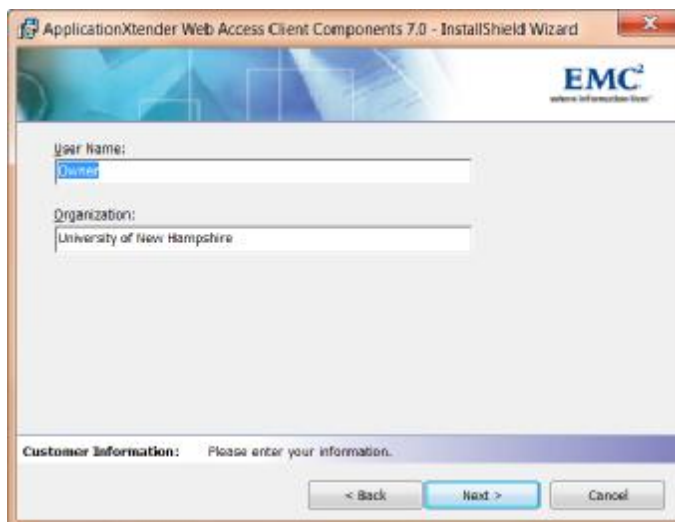
5. Click the **Next** button.



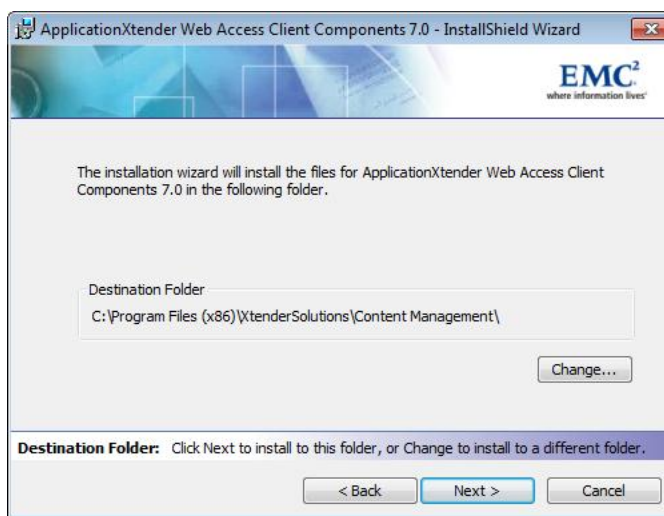
6. Select **I accept the terms in the license agreement** and click the **Next** button.



7. Enter User Name and Organization and click the **Next** button.

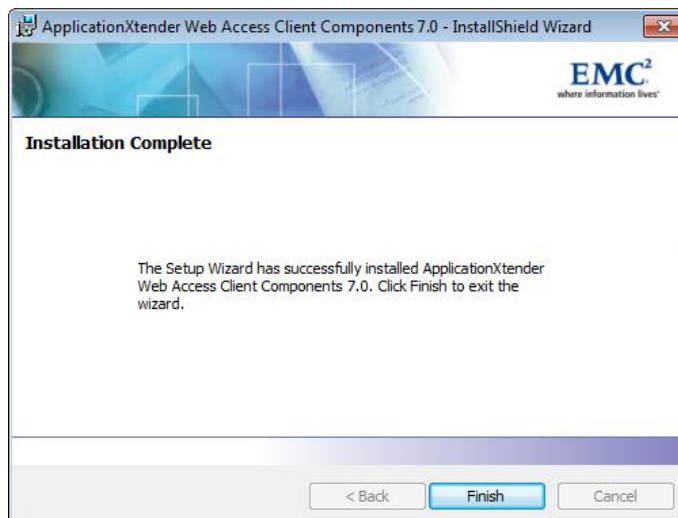


8. Confirm the Destination Folder and click the **Next** button.



9. Leave the default to **Complete** installation and click the **Next** button.

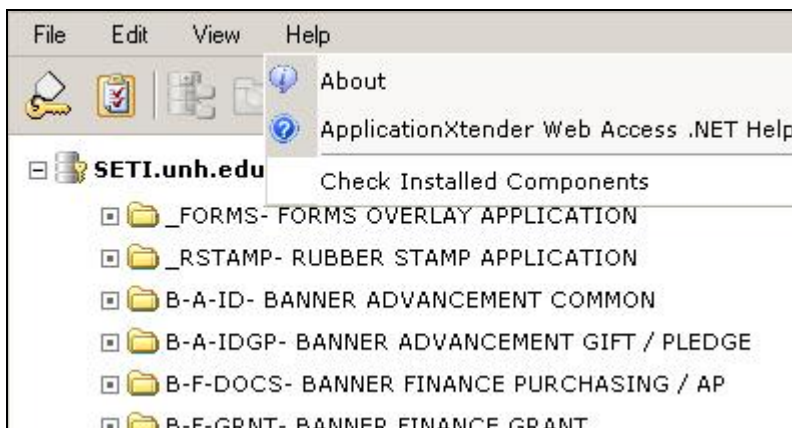
10. Click the **Finish** button to complete the installation.



To install the Xtender web components manually, follow these steps.

Note: You must have administrative rights to your machine.

1. Log into the Enterprise **VPN**.
2. Log into **Xtender**.
3. Follow the menu path: **Help >> Check Installed Components**.



4. You may see a yellow bar at the top of the window, telling you that you need to install an ActiveX control. Click that

message and move through the installation.

This will allow you to see the installation status in the Current install status section of the window.

5. Review the install status of the components.
6. If all the components are installed, click the **Close** button and skip the rest of the steps.
7. If the components are not installed, continue on with step 8.
8. Click the computer icon at the start of the first row to download the first component.







9. Run the installation.
10. Repeat steps 8-9 to install all of the components.
11. When you have installed the four components, click the **Close** button.

Note: The Current install status section may not show all components installed.

12. If you would like to confirm that each component was installed, follow the menu path: **Help >> Check Installed Components**. The Current install status section should show that each component is installed. The component versions may be different from this screen shot.

ApplicationXtender Web Access .NET components

	Component	Description	Download Size
	ApplicationXtender Web Access Scan Component 6.50	ApplicationXtender Web Access Scan Component is required for the interactive control.	9.2 MB
	ApplicationXtender Web Access Adobe Component 9.1	ApplicationXtender Web Access Adobe Component is required for viewing and printing PDF files.	55.5 MB
	ApplicationXtender Web Access Keyview Component 10.80	ApplicationXtender Web Access Keyview Component is required for rendering foreign files.	13.2 MB
	ApplicationXtender Spell Check Component 5.16	ApplicationXtender Spell Check Component is required to perform a text annotation spell check.	4.6 MB

Current install status

ApplicationXtender Scanning Component:	Installed (v6.50)
ApplicationXtender Adobe Component:	Installed (v9.1)
ApplicationXtender Keyview Component:	Installed (v10.8)
ApplicationXtender Spell Check Component:	Installed (v5.16)

Close
Help

Adjust 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. The settings changes below are suggestions.

To change your settings:

1. Log into the **VPN**.
2. Log into **Xtender**.
3. From the Application List screen, click the **User Settings** button on the toolbar.



4. 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**
5. On the **Interactive Viewer** tab:
 - Select the **Enable Interactive Viewer** checkbox
 - Select the **Use Keyview To Display Foreign Files** checkbox
6. 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
7. Make changes to any of the other tabs, as desired.
8. To save your settings, click the **Save** button.

Review the user documentation

User documentation is available on the USNH Gateway page and on the UNH IT Knowledge Base. Follow the menu paths below to review the documentation.

<http://www.usnhgateway.org/> >> **Documentation** >> **Xtender**

<https://unh.edu/it/kb/> (search **Xtender**)

Log into Xtender

ApplicationXtender Web Access (WX)

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2. Open **Internet Explorer** and go to the **USNH Gateway** page: <http://www.usnhgateway.org/>.
3. Follow the menu path: **Production Systems >> Application Xtender Web Access** and select the appropriate database.
4. In the **Data Source** drop-down field, confirm that the correct data source appears. Change, if necessary.
5. In the **User Name** field, enter your user name.
Note: This is typically your ITID.
6. In the **Password** field, enter your password.
7. Click the **Login** button.
8. ApplicationXtender opens.

Log into Xtender

ApplicationXtender Image Capture, Document Manager (AX)

The full client version of ApplicationXtender actually consists of separate software applications, which are installed directly on the computer. The two most commonly used are Document Manager and Image Capture:












- Image Capture is used to scan or import documents.
- Document Manager is used for the tasks you do with the documents after they have been scanned or imported, such as index, view, annotate, print, or delete.











To log into ApplicationXtender Document Manager or Image Capture:

1. Log into the **VPN**.
2. From the **Start Menu** on your computer desktop, follow the menu path: **All Programs >> ApplicationXtender Desktop**. Select either **Document Manager** or **Image Capture**.
3. In the **User Name** field, enter your user name.
Note: Typically this is your ITID.
4. In the **Password** field, enter your password.
5. Click the **Login** button.
6. ApplicationXtender opens.

Xtender (Web Access) Quick Reference

Commonly Used Buttons:

	<u>BDMS – Display Document</u> – (Banner) log into XtenderSolutions and search for docs for the active Banner record
	<u>BDMS – Add Document</u> – (Banner) log into XtenderSolutions and import docs to the active Banner record
	<u>Application List</u> – return to the list of applications
	<u>Logout</u> – log out of Xtender
	<u>User Settings</u> – view/change your WX settings
	<u>New Query</u> – return to a blank query screen
	<u>Query Results</u> – return to the list of documents retrieved by the query
	<u>Open Selected Documents</u> – view the documents you select from the query results, without returning to the query results list
	<u>Previous Document</u> – view the previous document in the query results, without returning to the query results list
	<u>Next Document</u> – view the next document in the query results, without returning to the query results list
	<u>Page Menu</u> – import or scan a document; delete a page

	<u>Rubber Stamp</u> – select a rubber stamp to annotate a document
	<u>Print Current Page</u> – print the page you're viewing
	<u>Batch List</u> – view batches waiting to be indexed
	<u>Document Index</u> – view the document's index fields
	<u>New</u> – index a new doc, starting with current page
	<u>Last Modified Index</u> – pull back the index from the last saved document, to index a new document
	<u>Select Indexes</u> – show all docs that have been indexed to the person. Appears during batch indexing.
	<u>Key Reference and Indexes</u> – search for all docs indexed with the same index info (ex., ID, last name), to use the same indexing. Also shows a general record for the person.
	<u>Attach Current Page</u> – attach the page you're viewing to the previously indexed document
	<u>Attach All Pages</u> – attach all the remaining pages in the batch to the previously indexed document
*	Wildcard for searching. Examples: Jo* – search for anything starting with “jo” *ing – anything ending with “ing” *the* - anything with “the” within the word

Import and index, from Banner:






1. Navigate to the appropriate Banner record.
2. In Banner, click the **BDM – Add Document** button.
3. In Xtender, click the **Page Menu** button.
4. Follow the menu path: **New Page >> Import File >> Append**.
5. Select the file to import and click the **Open** button.
6. Click the **New** button.
7. Confirm/enter the index information, and click the **Save** button.
8. In the All Document Pages Have Been Indexed window, select **Logout of AppXtender Web Access .NET** to log out of Xtender.





View student records, from Banner:

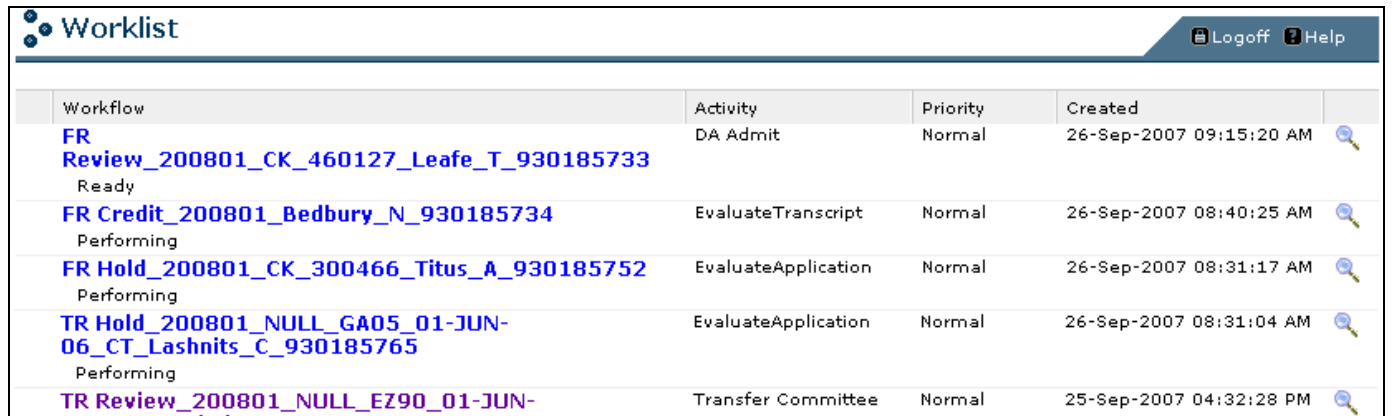
1. Navigate to the appropriate record in Banner.
2. Click the **BDM – Display Document** button.
3. Click the **Open Document** button next to the appropriate document.
Note: the documents that are retrieved may depend on which field your cursor was in on the Banner form.

Workflow Quick Reference

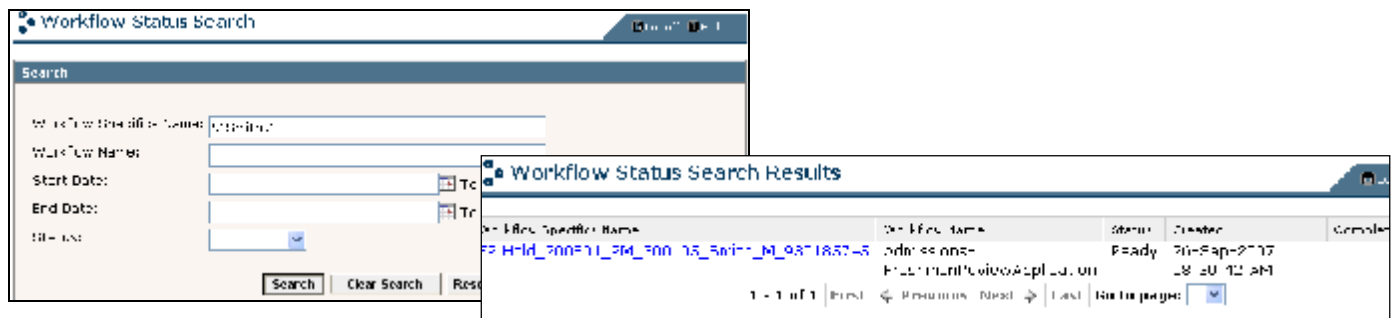
Commonly Used Buttons:

	Workflow Submit – (Banner) mark the current workflow activity as complete
	Workflow Release – (Banner) break the connection to the workflow activity. To reconnect, return to the worklist and select the activity again.
	Reserve – reserve a workflow activity for yourself or someone else. Removes activity from other users' worklists.
	Release – release a reserved activity back to all users who would normally see that activity
	Refresh – refresh the information on your screen. Can also use the Internet Explorer refresh button.

	Complete – manually mark an activity as complete
	View details – display details about the activity. Also use to reserve activity to yourself, or release it.
	Completed – checkmark on the workflow status screen indicates that the activity is complete
	Running – runner on the workflow status screen indicates that the workflow is at that activity
%	Wildcard for searching. Examples: FR% – search for anything starting with “fr” %ing – anything ending with “ing” %Smith% - anything with “Smith” within the word



Workflow	Activity	Priority	Created
FR Review_200801_CK_460127_Leafe_T_930185733 Ready	DA Admit	Normal	26-Sep-2007 09:15:20 AM
FR Credit_200801_Bedbury_N_930185734 Performing	EvaluateTranscript	Normal	26-Sep-2007 08:40:25 AM
FR Hold_200801_CK_300466_Titus_A_930185752 Performing	EvaluateApplication	Normal	26-Sep-2007 08:31:17 AM
TR Hold_200801_NULL_GA05_01-JUN-06_CT_Lashnits_C_930185765 Performing	EvaluateApplication	Normal	26-Sep-2007 08:31:04 AM
TR Review_200801_NULL_EZ90_01-JUN-	Transfer Committee	Normal	25-Sep-2007 04:32:28 PM



Workflow Specific Name	Workflow Name	Status	Created	Complete
FR Hold_200801_CK_300466_Titus_A_930185752	EvaluateApplication	Ready	26-Sep-2007 08:31:17 AM	

Do a workflow activity:










- On the Worklist screen, select an activity.
- When you have completed the activity, press the **Workflow Submit** button (if you're in Banner, from Workflow)
– **OR** –
Click the **View details** button (on your worklist) for the activity, and then click the **Complete** button.
- Return to your worklist, and click the **Refresh** button.





Search for a workflow:

- On the **Workflow Status Search** screen, enter your search criteria in the **Workflow Specifics Name** field. Use the wildcard, if necessary.
- Click the **Search** button.
- On the Workflow Status Search Results screen, select the workflow name to view the workflow status.

Xtender (Full Client) Quick Reference






Commonly Used Buttons/Keys – Document Manager (DM) & Image Capture (IC):





	<u>Banner XtenderSolutions</u> – (Banner) log into XtenderSolutions and search for docs for the active Banner record
	<u>BXS – Add Document</u> – (Banner) log into XtenderSolutions and import docs to the active Banner record
	<u>Application view</u> – (DM, IC) show/hide the list of applications
	<u>Configuration</u> – (DM, IC) view/change your user settings
	<u>New Query</u> – (DM) return to a blank query screen
	<u>Run Query</u> – (DM) run the active query
	<u>Query view</u> – (DM) show/hide the query window list of documents retrieved by the query
	<u>Rubber Stamp</u> – (DM) select a rubber stamp to annotate a document with
	<u>Show Index</u> – (DM) show or hide the document's index fields. Specify where they appear on screen.

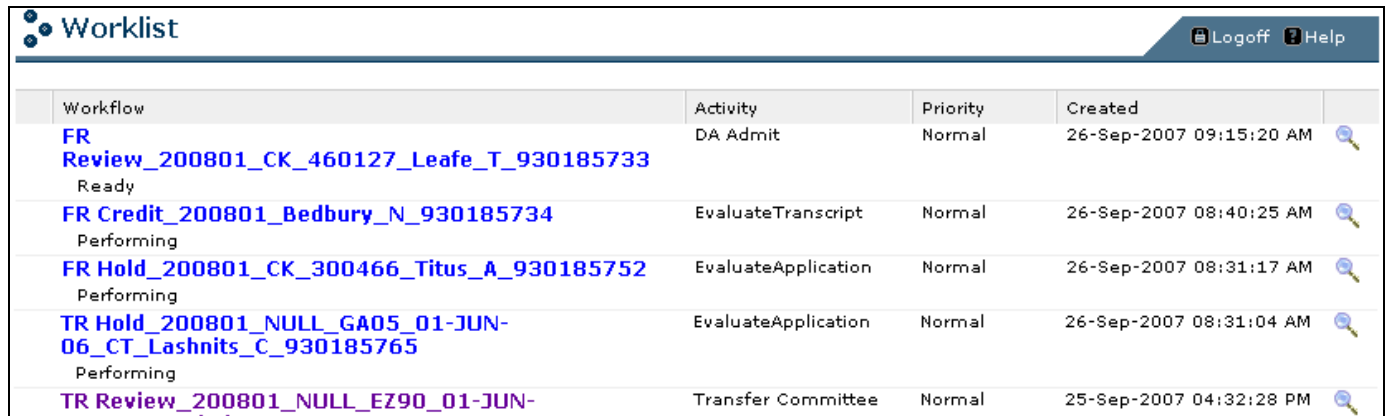
	<u>Scanner setup</u> – (IC) set the scanner settings for the batch to be scanned
	<u>New document</u> – index a new document, starting with current page
	<u>Attach Current Page</u> – (DM) attach the page you're viewing to the previously indexed document
	<u>Attach All</u> – (DM) attach all the remaining pages in the batch to the previously indexed document
Shift + F4	<u>Key Reference and Indexes</u> – (DM) search for all docs indexed with the same index info (ex., ID, last name), to use the same indexing. Also shows a general record for the person.
F4	<u>Select Indexes</u> – (DM) show all docs that have been indexed to the person. Appears during batch indexing.
F7	<u>Auto Index</u> – (DM) search for any doc types in the index table
F9	<u>Last Modified Index</u> – (DM) pull back the index from the last saved document, to index a new document
*	Wildcard for searching. Examples: Jo* – search for anything starting with “jo” *ing – anything ending with “ing” *the* - anything with “the” within the word

Workflow Quick Reference

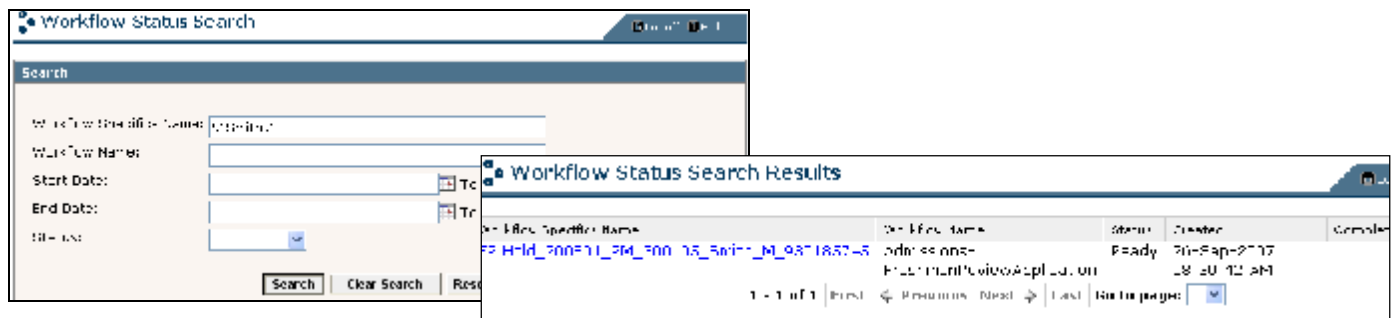
Commonly Used Buttons:

	Workflow Submit – (Banner) mark the current workflow activity as complete
	Workflow Release – (Banner) break the connection to the workflow activity. To reconnect, return to the worklist and select the activity again.
	Reserve – reserve a workflow activity for yourself or someone else. Removes activity from other users' worklists.
	Release – release a reserved activity back to all users who would normally see that activity
	Refresh – refresh the information on your screen. Can also use the Internet Explorer refresh button.

	Complete – manually mark an activity as complete
	View details – display details about the activity. Also use to reserve activity to yourself, or release it.
	Completed – checkmark on the workflow status screen indicates that the activity is complete
	Running – runner on the workflow status screen indicates that the workflow is at that activity
%	Wildcard for searching. Examples: FR% – search for anything starting with “fr” %ing – anything ending with “ing” %Smith% - anything with “Smith” within the word



Workflow	Activity	Priority	Created
FR Review_200801_CK_460127_Leafe_T_930185733 Ready	DA Admit	Normal	26-Sep-2007 09:15:20 AM
FR Credit_200801_Bedbury_N_930185734 Performing	EvaluateTranscript	Normal	26-Sep-2007 08:40:25 AM
FR Hold_200801_CK_300466_Titus_A_930185752 Performing	EvaluateApplication	Normal	26-Sep-2007 08:31:17 AM
TR Hold_200801_NULL_GA05_01-JUN-06_CT_Lashnits_C_930185765 Performing	EvaluateApplication	Normal	26-Sep-2007 08:31:04 AM
TR Review_200801_NULL_EZ90_01-JUN-	Transfer Committee	Normal	25-Sep-2007 04:32:28 PM



Workflow Specific Name	Workflow Name	Status	Created	Complete
FR Hold_200801_CK_300466_Titus_A_930185752	EvaluateApplication	Ready	26-Sep-2007 08:31:17 AM	

Do a workflow activity:

1. On the Worklist screen, select an activity.
2. When you have completed the activity, press the **Workflow Submit** button (if you're in Banner, from Workflow)
– **OR** –
Click the **View details** button (on your worklist) for the activity, and then click the **Complete** button.
3. Return to your worklist, and click the **Refresh** button.

Search for a workflow:

1. On the **Workflow Status Search** screen, enter your search criteria in the **Workflow Specifics Name** field. Use the wildcard, if necessary.
2. Click the **Search** button.
3. On the Workflow Status Search Results screen, select the workflow name to view the workflow status.

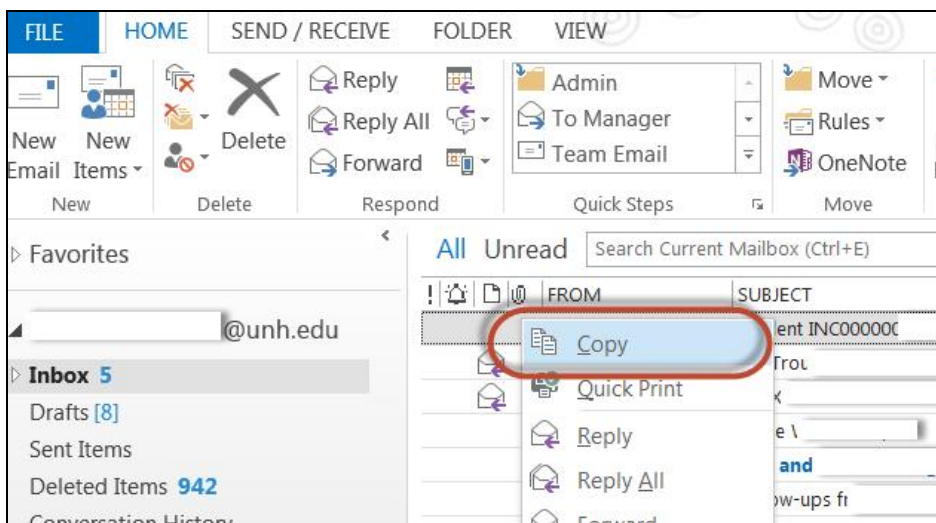
Save an Outlook Email into Xtender

Need to save an email from Outlook into Xtender? You can easily copy and paste it into Xtender.

Note: This tip is for anyone using the web version of Xtender and an installed version of Outlook (not Outlook Web App). It also assumes that you have the appropriate security to add documents into Xtender.

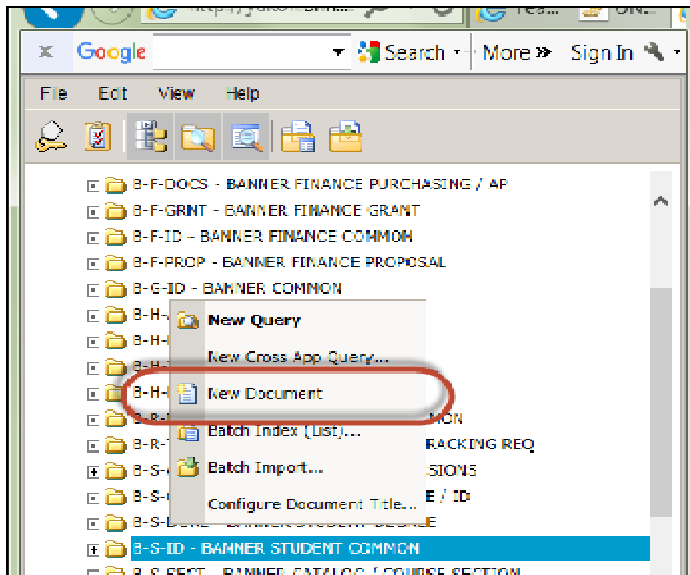
Here's how:

1. Start with both Xtender Web Access and Outlook open. In Outlook, you should be looking at the list of email. In Xtender, you should be looking at the Application List.
2. In **Outlook**, **right-click** on the closed email and select **Copy**.

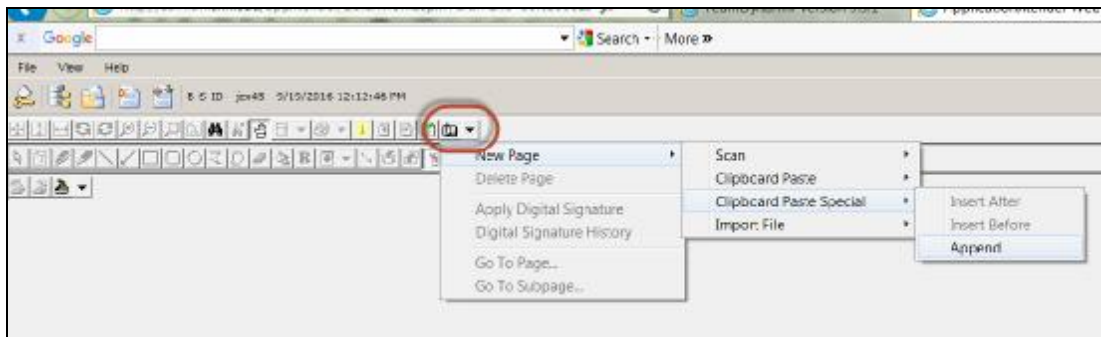


3. **Switch** to **Xtender**.

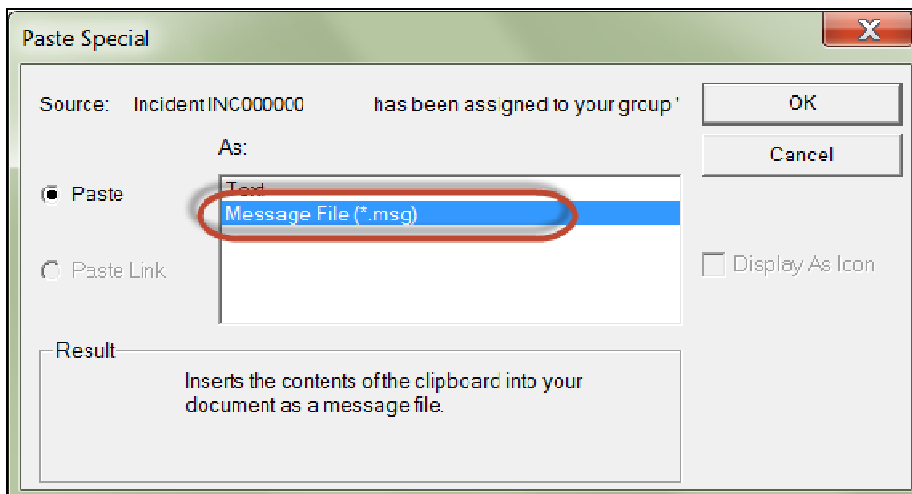
4. In **Xtender**, **right-click** on the appropriate **application** and select **New Document**.



5. Click the **Page Menu** button and follow the menu path: **New Page >> Clipboard Paste Special >> Append**.

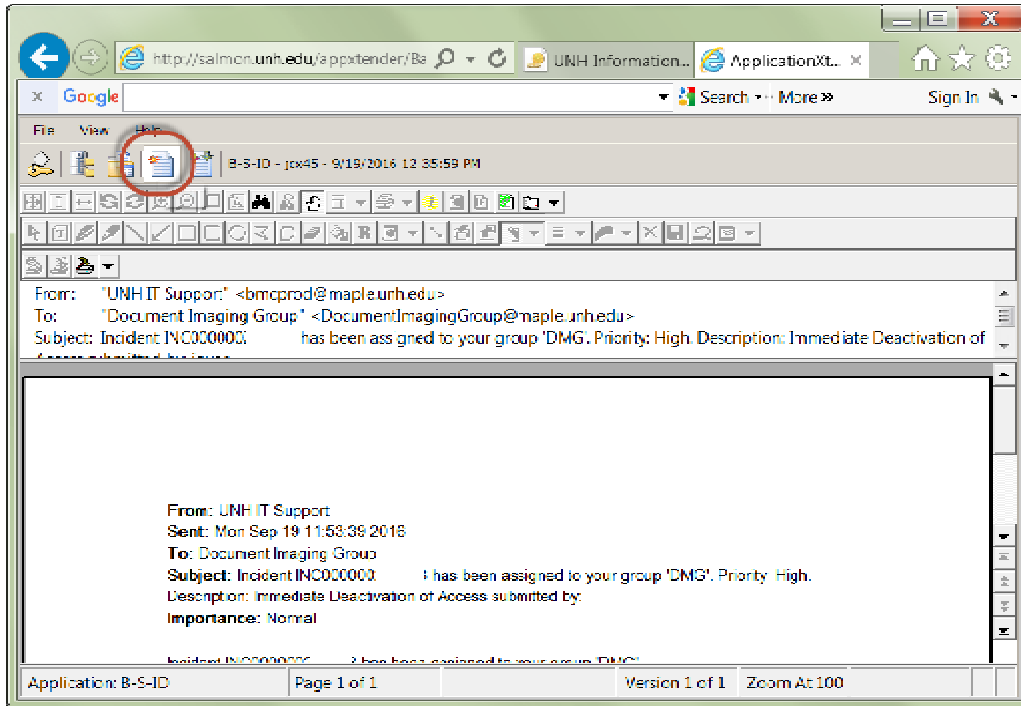


6. Select **Message File (*.msg)**, and click the **OK** button.



7. If you wish to index the document immediately, click the **New** button to open the indexing screen and index as you normally would.

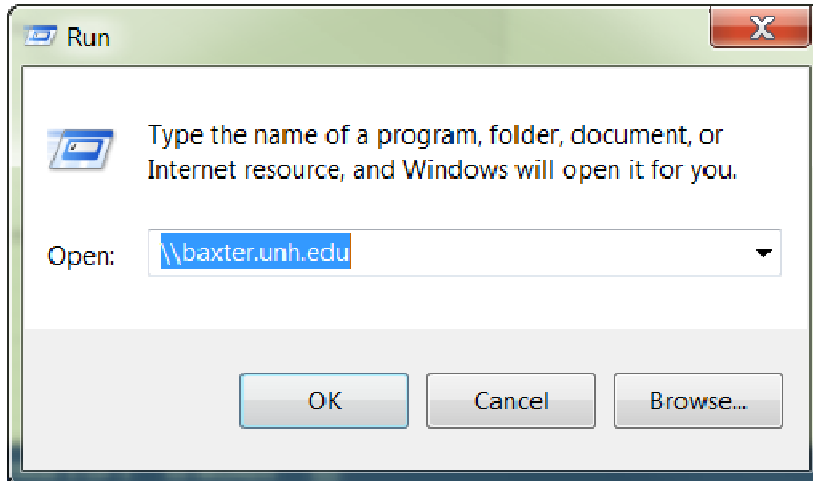
Note: If you simply close the document you just imported – without indexing it, it will wait patiently for you on the Batch List.



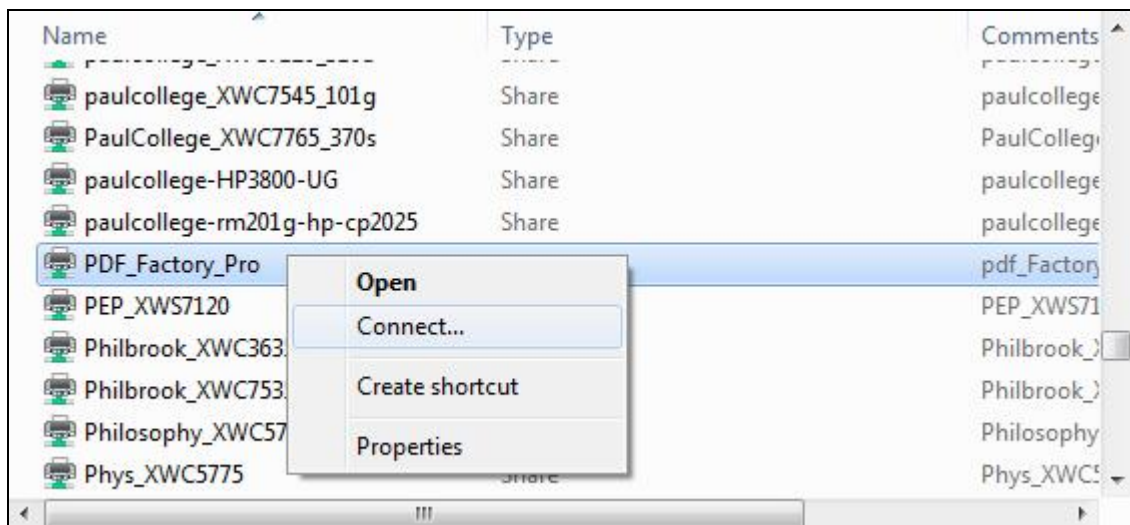
These steps work for copying in an attachment from an email as well. In step 2, open the email and right-click the attachment. Then, select Copy.

Installing the pdfFactory Pro print driver

1. From the run line (**Start >> Run**), type [\\baxter.unh.edu](http://baxter.unh.edu) and click the **OK** button.



2. **Right click** on the **PDF_Factory_Pro** printer and select **Connect...**



3. That's it. The driver is installed on your computer and you should be able to use pdfFactory Pro to "print" documents to PDF.