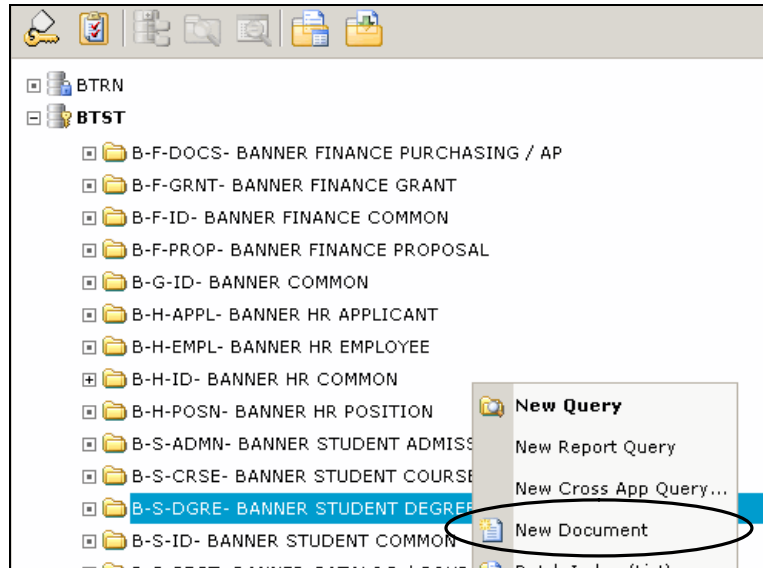


Import and index a single document

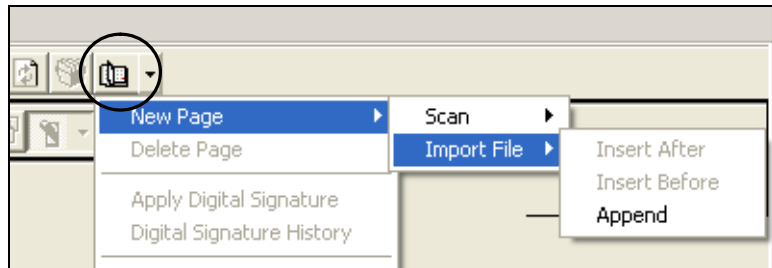
ApplicationXtender Web Access (WX)

In order to import a document into Xtender, you must first have the document saved off somewhere.

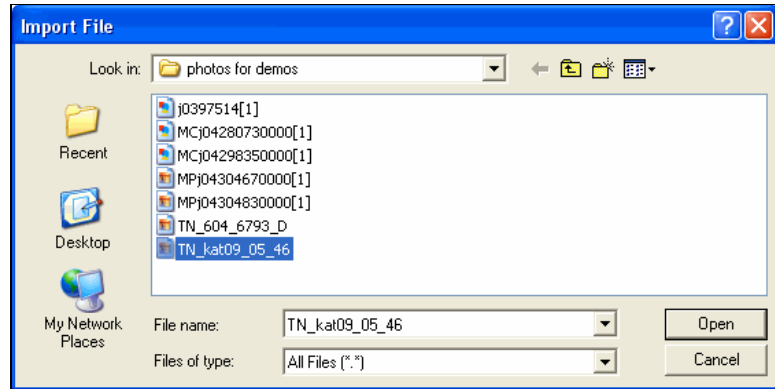
1. Log into ApplicationXtender Web Access.
2. From the Application List, **right-click** the application you will import the document into, and select **New Document** from the menu.



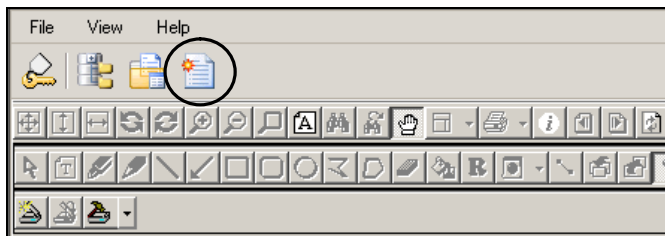
3. Click the **New Page** button.



4. Follow the menu path: **New Page >> Import File >> Append**.
5. In the **Import File** box, select the file you wish to import and click the **Open** button.



6. The document is imported and is now ready to be indexed.
7. Click the **New** button.



8. The **Index Name/Field Value** screen appears.
Note: The index fields you see depend on the application you are in.

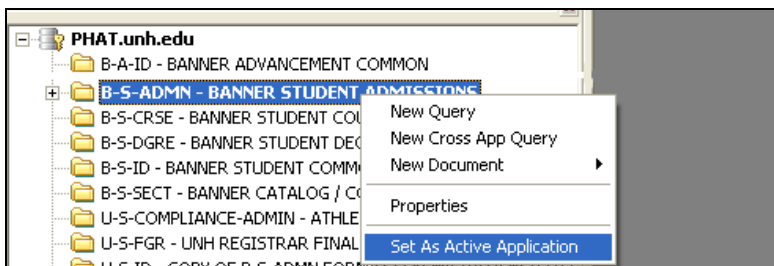
Index Name	Field Value
ID	<input type="text"/>
PIDM	<input type="text"/>
DOCUMENT TYPE	<input type="text"/>
LAST NAME	<input type="text"/>
FIRST NAME	<input type="text"/>
SSN	<input type="text"/>
BIRTH DATE	<input type="text"/>
POSITION	<input type="text"/>
POSITION NUMBER	<input type="text"/>
POSITION SUFFIX	<input type="text"/>
HIRE DATE	<input type="text"/>
TERMINATION DATE	<input type="text"/>
ROUTING STATUS	<input type="text"/>
ACTIVITY DATE	2006-12-07 13:22:50

9. Enter the index terms.
Note: Fields in bold are required.
10. When you have entered the index terms, click the **Save** button.
11. When you click Save, you may see an error message, indicating that a unique key violation has occurred. This means that the document type already exists for this person.
 - a. If you **do not see this error**, continue to **step 12**.
 - b. If you **see this error**, please refer to the user documentation titled “What do I do about this Unique Key Violation?”.
12. The document is now imported and indexed.
13. Log out of Xtender to end your session.

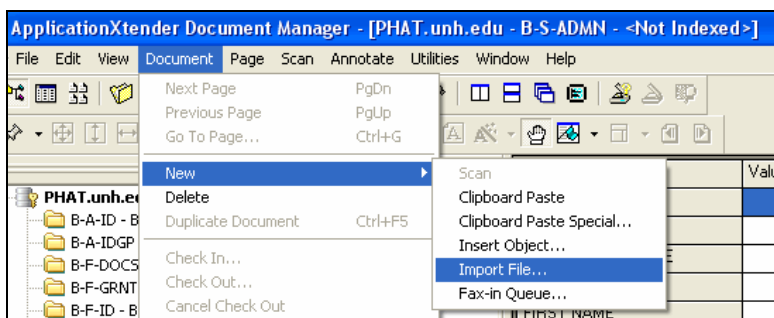
Import and index a single document

ApplicationXtender Document Manager (AX)

1. Open ApplicationXtender Document Manager and log in.
2. In the Xtender **application list**, **right-click** the appropriate application (example: ID, POSN, EMPL, PHAT), and select **Set as Active Application** from the menu.
This will ensure that all the imported documents will be saved to that application.



3. Follow the menu path: **Document >> New >> Import File**.



4. In the **Import File** box, select the file you wish to import and click the **Open** button.
5. The document appears, along with the screen to index the document.
6. Enter the appropriate index terms and click the **Save** button.
Note: Fields in bold are required.
7. When you click Save, you may see an error message, indicating that there is already a document with that unique key value. This means that the document type already exists for this person.
 - a. If you **do not see this error**, continue to **step 8**.
 - b. If you **see this error**, please refer to the user documentation titled “What do I do about this Unique Key Violation?”.

8. The document is now imported and indexed.
9. Log out of Document Manager.

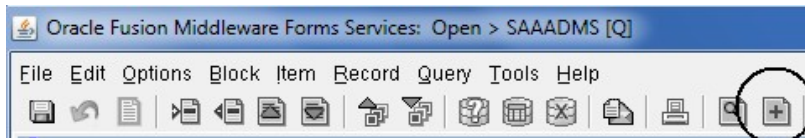
Import and index a single document from Banner

Application Xtender Web Access (WX)

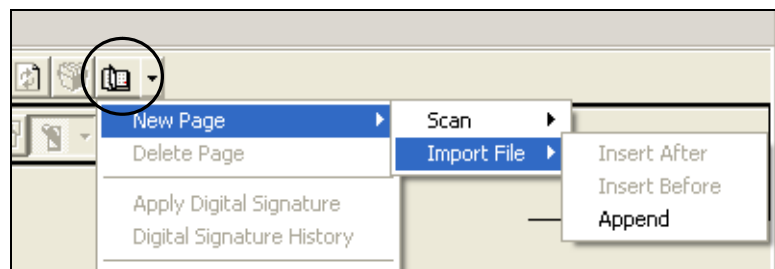
In order to import a document into Xtender, you must first have the document saved off somewhere.

For example, if you wish to import an email from Outlook, you must first open that email in Outlook, choose File >> Save as, name the email, choose Text Only in the Save As Type drop-down, and save it.

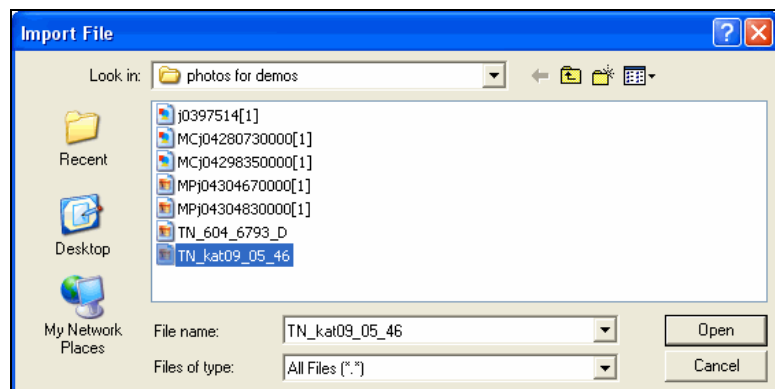
1. Log into Banner, and navigate to the appropriate record.
2. Click the **BDMS – Add Document** button to log into Xtender.



3. In Xtender, click the **New Page** button.

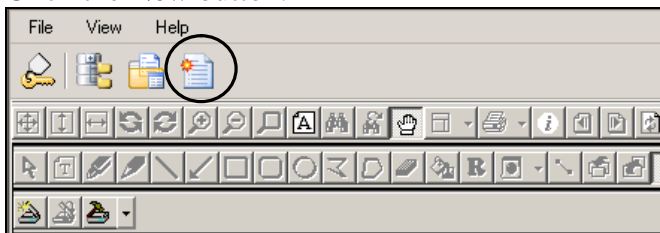


4. Follow the menu path: **New Page >> Import File >> Append**.
5. In the **Import File** box, select the file you wish to import and click the **Open** button.



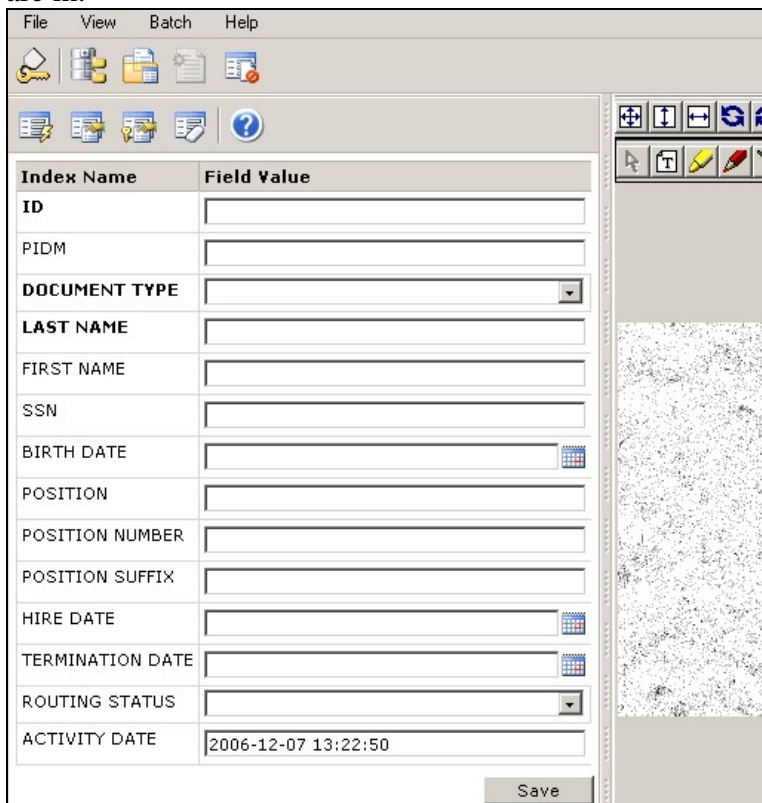
6. The document is imported and is now ready to be indexed.

7. Click the **New** button.



8. The **Index Name/Field Value** screen appears.

Note: The index fields you see depend on the application you are in.



Index Name	Field Value
ID	<input type="text"/>
PIDM	<input type="text"/>
DOCUMENT TYPE	<input type="text"/>
LAST NAME	<input type="text"/>
FIRST NAME	<input type="text"/>
SSN	<input type="text"/>
BIRTH DATE	<input type="text"/>
POSITION	<input type="text"/>
POSITION NUMBER	<input type="text"/>
POSITION SUFFIX	<input type="text"/>
HIRE DATE	<input type="text"/>
TERMINATION DATE	<input type="text"/>
ROUTING STATUS	<input type="text"/>
ACTIVITY DATE	2006-12-07 13:22:50

9. Confirm and enter the index terms.

Note: Many of the fields will be filled in from the Banner record you were in.

Note: Fields in bold are required.

10. When you have entered index terms, click the **Save** button.

11. When you click Save, you may see an error message, indicating that a unique key violation has occurred. This means that the document type already exists for this person.

a. If you **do not see this error**, continue to **step 12**

- b. If you **see this error**, please refer to the user documentation titled “What do I do about this Unique Key Violation?”.

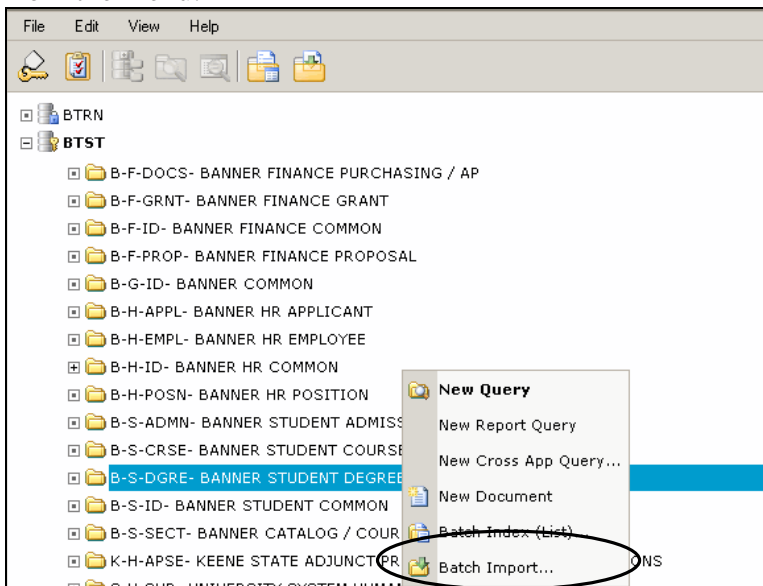
12. The document is now scanned and indexed.

13. Log out of Xtender to end your session.

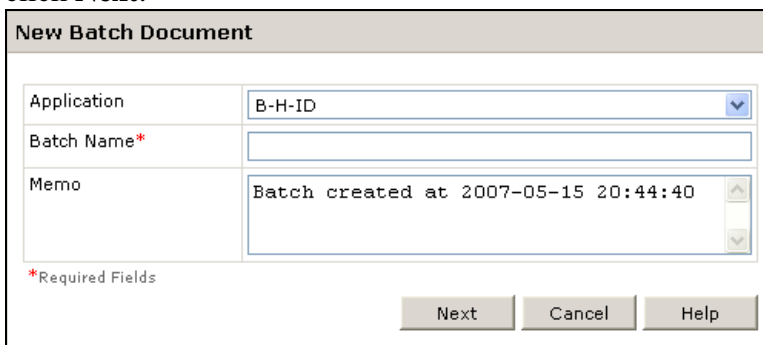
Scan a batch of documents

ApplicationXtender Web Access (WX)

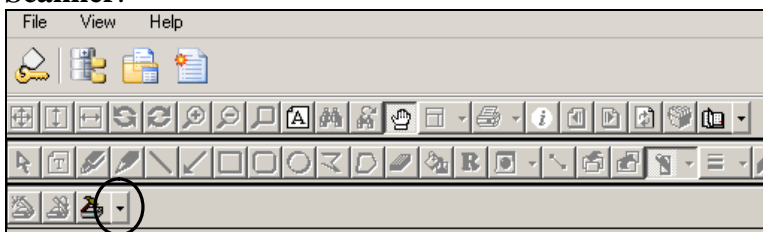
1. Log into ApplicationXtender Web Access.
2. In the application list, **right-click** the appropriate **application** (example: EMPL, ADMN, ID), and select **Batch Import** from the menu.



3. The New Batch Document screen appears.
4. In the **Batch Name** field, enter a temporary batch name, and click **Next**.

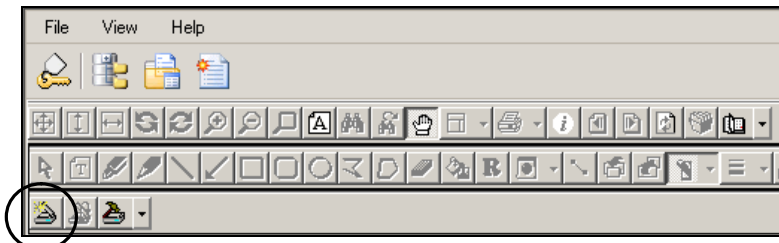


5. Click the **Scanner Setup** drop-down arrow, and select **Select Scanner**.



6. Choose your scanner and click **OK**.

7. Set your scanner settings, as necessary.
8. Place the documents to be scanned in the scanner.
9. Click the **Scan** button.

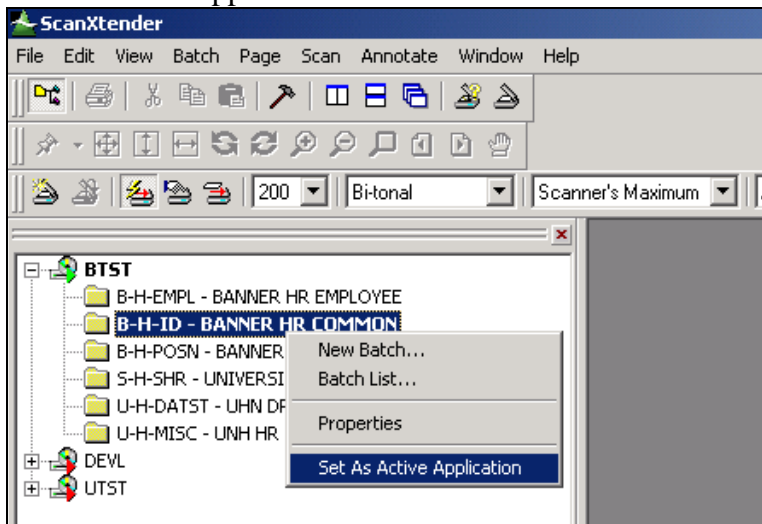


10. Once the documents have been scanned, they are ready to be indexed. For instructions, please refer to the **Index a batch of documents (WX)** user documentation.

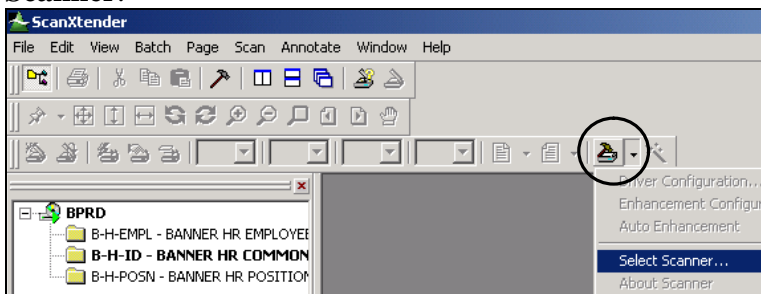
Scan a batch of documents

ApplicationXtender Image Capture (AX)

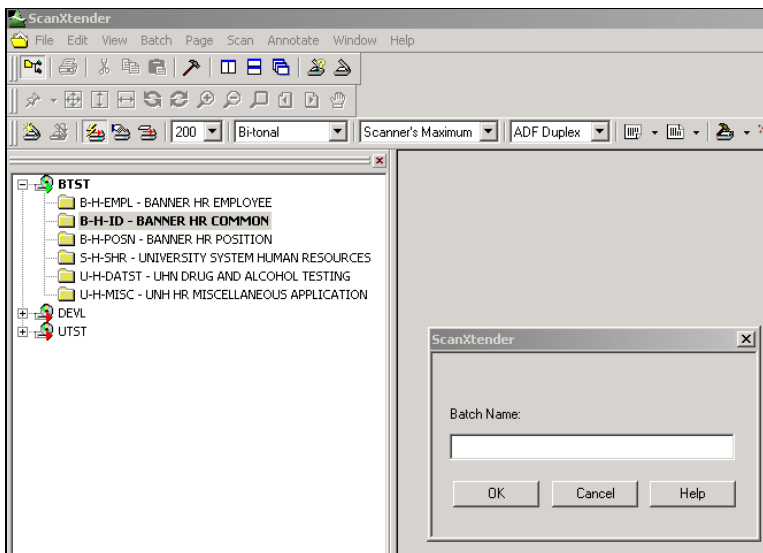
1. Open ApplicationXtender Image Capture and log in.
2. In the Xtender **application list**, **right-click** the appropriate application (example: ID, POSN, EMPL), and select **Set as Active Application** from the menu. This will ensure that all the scanned documents will be scanned to that application.



3. Click the **Scanner Setup** drop-down arrow, and select **Select Scanner**.



4. Choose your scanner and click **OK**.
5. Adjust the scanner and page settings, as necessary.
6. Put your documents in the scanner.
7. To begin scanning, follow the menu path: **Batch >> New Batch**.
8. In the **Batch Name** field, enter a temporary batch name and click **OK** to start the scanning.



9. When you have finished scanning the batch, follow the menu path: **File >> Exit** to close the batch and Image Capture.
10. The documents are now ready to be indexed. For instructions, please refer to the **Index a batch of documents (AX)** user documentation.

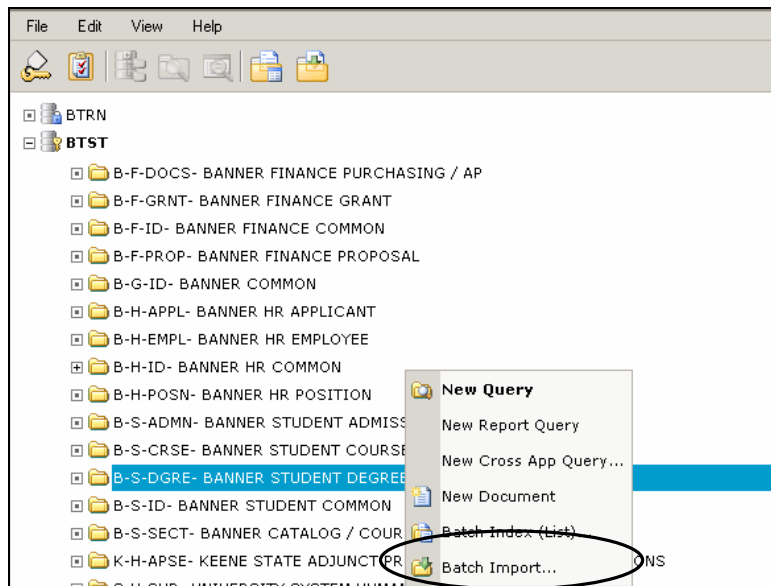
Import a batch of documents

ApplicationXtender Web Access (WX)

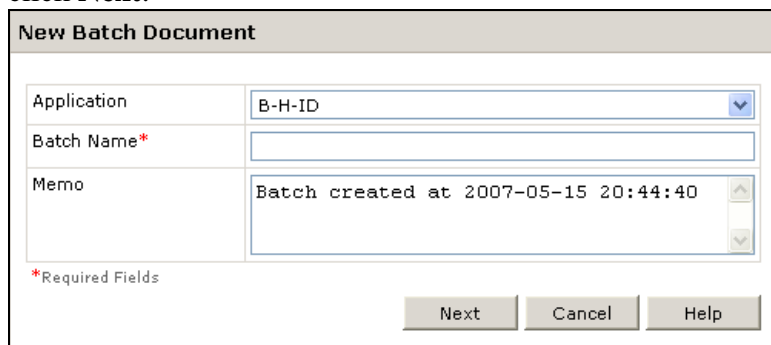
There may be times when you need to add documents to Xtender which are already electronic. The files may be electronic because you scanned the paper documents with an MFP, or because the file was not received on paper (for example: an email, Excel spreadsheet, or MS Word document).

Follow these steps to import a batch of documents into Xtender.

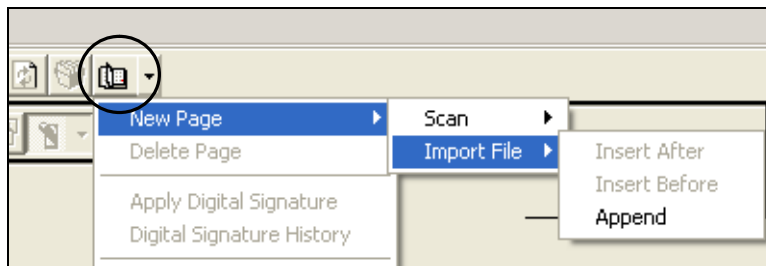
1. Log into ApplicationXtender Web Access.
2. In the application list, **right-click** the appropriate **application** (example: EMPL, ADMN, ID), and select **Batch Import** from the menu.



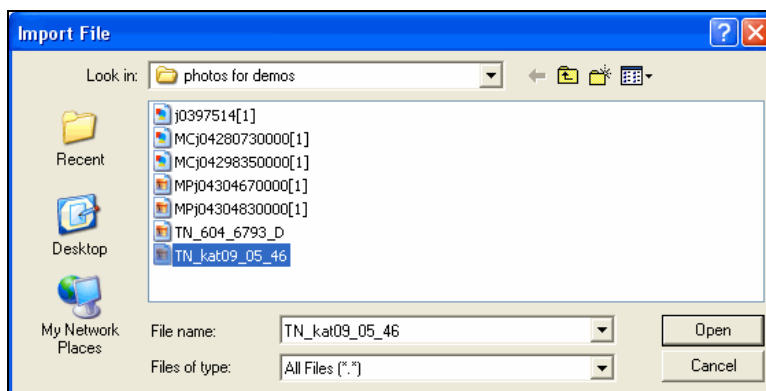
3. The New Batch Document screen appears.
4. In the **Batch Name** field, enter a temporary batch name, and click **Next**.

A screenshot of the 'New Batch Document' form. The form has three main input fields: 'Application' (a dropdown menu set to 'B-H-ID'), 'Batch Name*' (an empty text field), and 'Memo' (a text area containing 'Batch created at 2007-05-15 20:44:40'). Below the fields, there is a legend for '*Required Fields'. At the bottom right, there are three buttons: 'Next', 'Cancel', and 'Help'.

5. Click the **New Page** button.



6. Follow the menu path: **New Page >> Import File >> Append**.
7. In the **Import File** box, select the files you wish to import and click the **Open** button.



8. The documents are now imported and ready to be indexed.
9. Once the documents have been imported, they are ready to be indexed. For instructions, please refer to the **Index a batch of documents (WX)** user documentation.

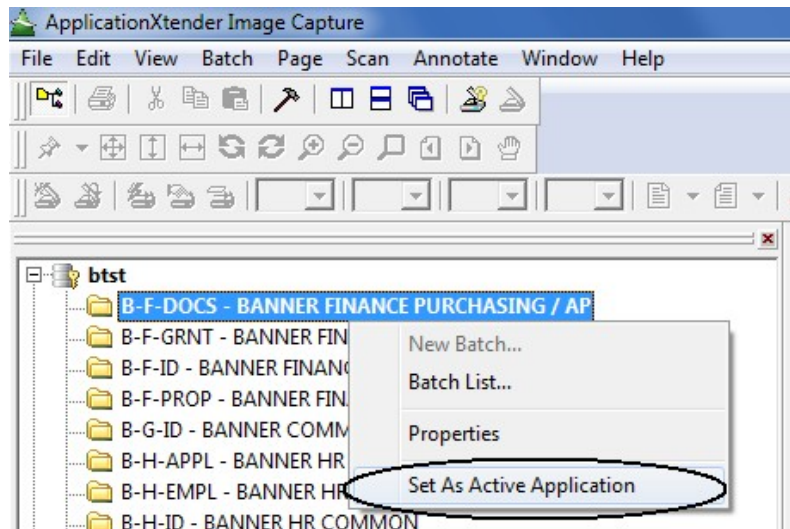
Import a batch of documents

ApplicationXtender Image Capture (AX)

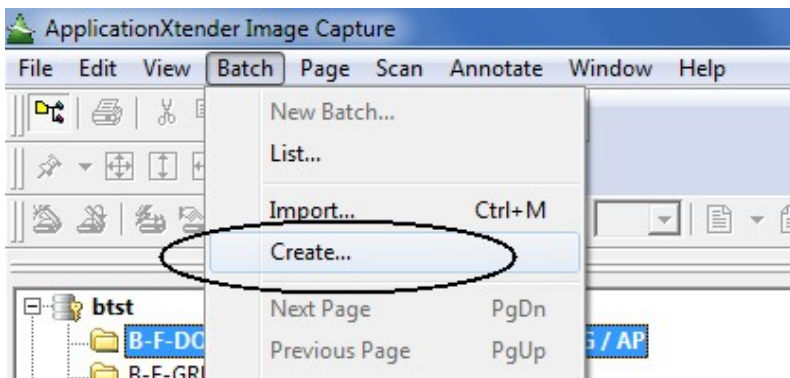
There may be times when you need to add documents to Xtender which are already electronic. The files may be electronic because you scanned the paper documents with an MFP, or because the file was not received on paper (for example: an email, Excel spreadsheet, or MS Word document).

Follow these steps to import a batch of documents into Xtender.

1. Open ApplicationXtender Image Capture and log in.
2. In the Xtender **application list**, **right-click** the appropriate application (example: ID, POSN, EMPL), and select **Set as Active Application** from the menu.
This will ensure that all the imported documents will be saved to that application.



3. Follow the menu path: **Batch** >> **Create**.



4. In the **Import File** box, select the files you wish to import, enter a **Batch Name**, and click the **Open** button.

5. The batch has been created and the documents are now ready to be indexed. For instructions, please refer to the **Index a batch of documents (AX)** user documentation.

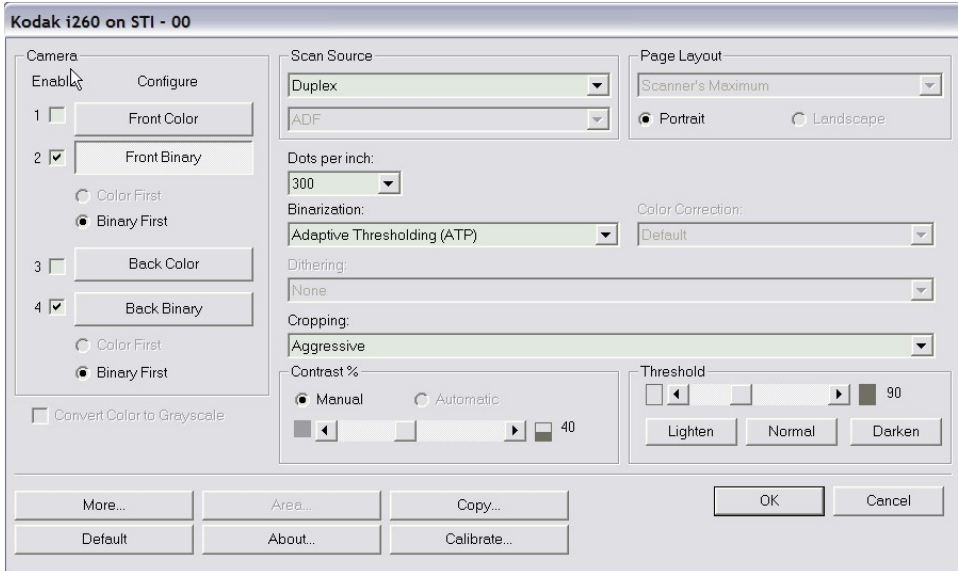
Kodak i260 Defined Scanner Settings

ISIS i260 Driver

Front Binary

Front Binary

Button – Front Camera Settings – Page 1

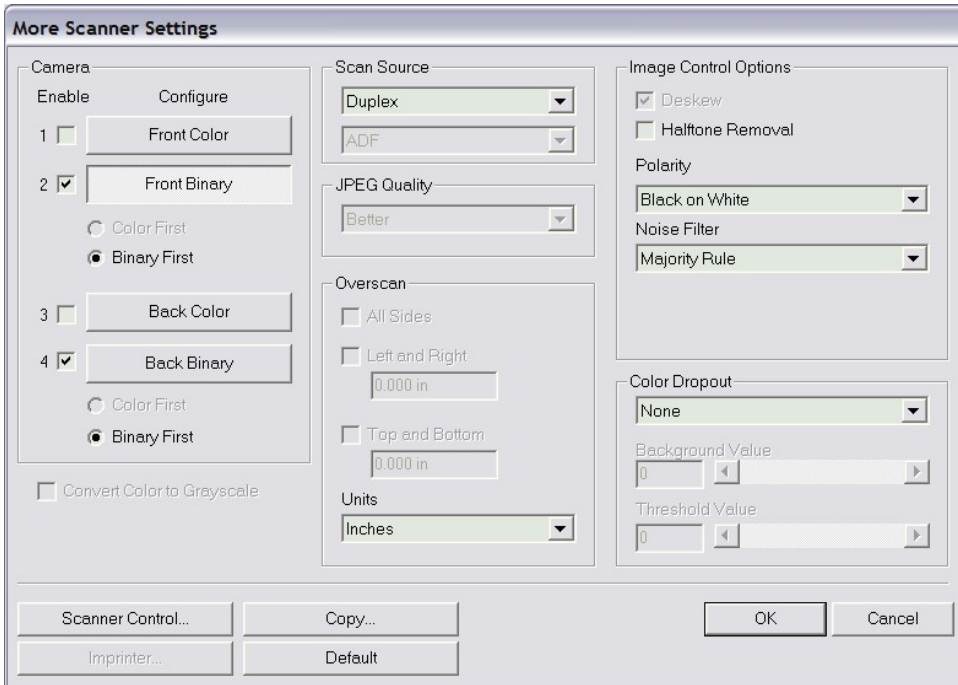


Front Binary

Button - Settings – Page 2

More...

button



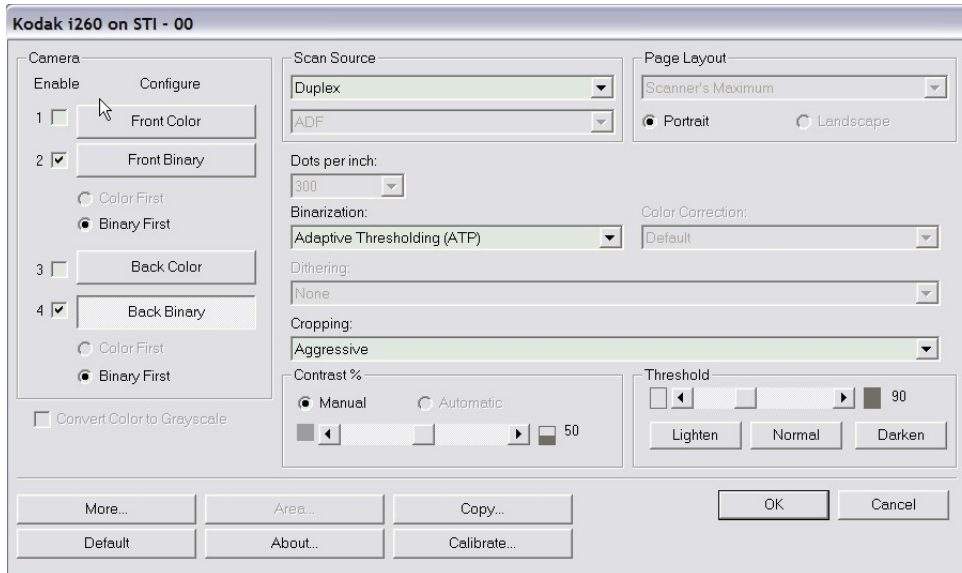
Kodak i260 Defined Scanner Settings

ISIS i260 Driver

Back Binary

Back Binary

Button - Settings Page 1

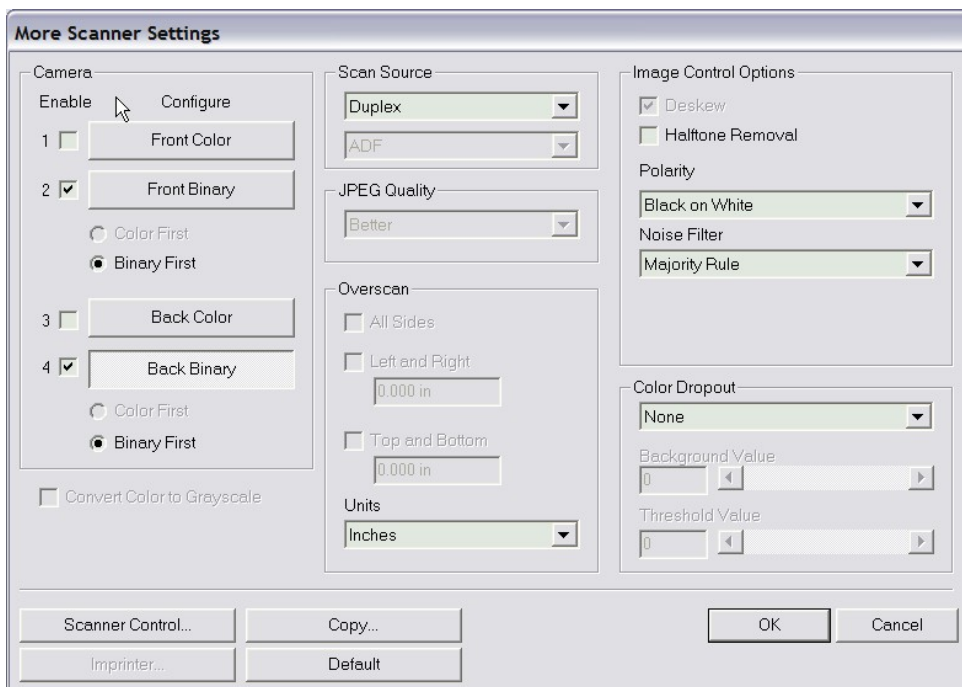


Back Binary

Button - Settings – Page 2

More...

button



What do I do about this Unique Key Violation error?

ApplicationXtender Web Access (WX)

When you see a Unique Key Violation error message while you are indexing a document, it means there is already a document indexed with the same key pieces of information.

Xtender does not allow more than one document to be indexed with the same key fields, so you have 2 choices: 1) index with different information, or 2) attach the new document to the document which was previously indexed.

To attach the new document to the document which has already been indexed:

1. Click the **OK** button to acknowledge the error.



2. Click the **Key Reference & Indexes** button to search for other documents saved with the same index terms.



3. The documents are displayed in a table where the index terms had been. Scroll to the right to see information for the document, to confirm you found the one you're looking for.

Document 1 - 1 of 1			
	STUDENT ID	LAST NAME	F
	123443333	SMITH	J

4. Once you find the document you want to add the new pages to, click the **Attach to Document** button.

Document 1 - 1 of 1			
	STUDENT ID	LAST NAME	F
	123443333	SMITH	J

5. This will attach the single page you're looking at, to the end of the document which had previously been indexed.
6. Xtender returns you to the regular indexing page, but now

anything you attach will be attached to the previously indexed document. Continue indexing as you normally would.

What do I do about this Unique Key Violation error?

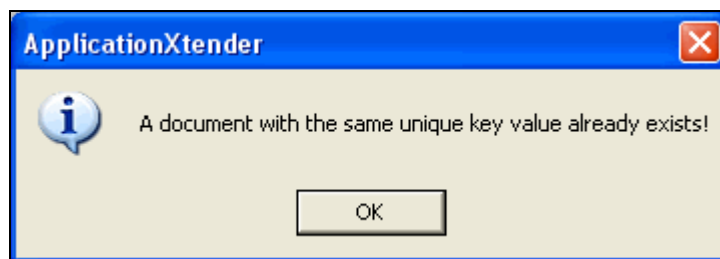
ApplicationXtender Document Manager (AX)

When you see a Unique Key Violation error message while you are indexing a document, it means there is already a document indexed with the same key pieces of information.

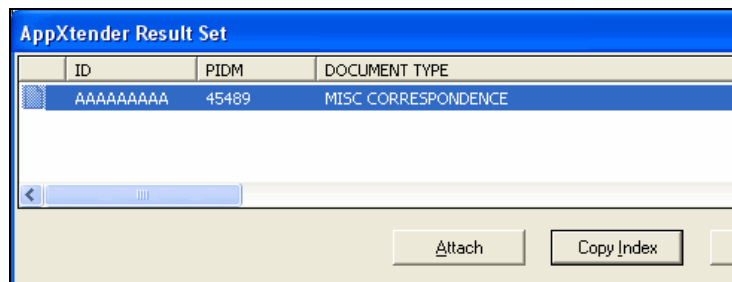
Xtender does not allow more than one document to be indexed with the same key fields, so you have 2 choices: 1) index with different information, or 2) attach the new document to the document which was previously indexed.

To attach the new document to the document which has already been indexed:

1. Click the **OK** button to acknowledge the error.



2. Press the <Shift> + <F4> keys on your keyboard to search for other documents saved with the same index terms.
3. The documents are displayed in a table.



4. Select the document you would like to attach to and click the **Attach** button.
5. This will attach the single page you're looking at, to the end of the document which had previously been indexed.
6. Xtender returns you to the regular indexing page, but now anything you attach will be attached to the previously indexed document. Continue indexing as you normally would.

Move / copy a batch to a different application

ApplicationXtender Web Access (WX)

It is possible to either move or copy batches from one application to another.

Note: You must have privileges to create batches in the target application. If you are moving batches from one application to another, you must also have privileges to delete batches. (If you are copying batches out of an application, you do not need to have the ability to delete batches.)

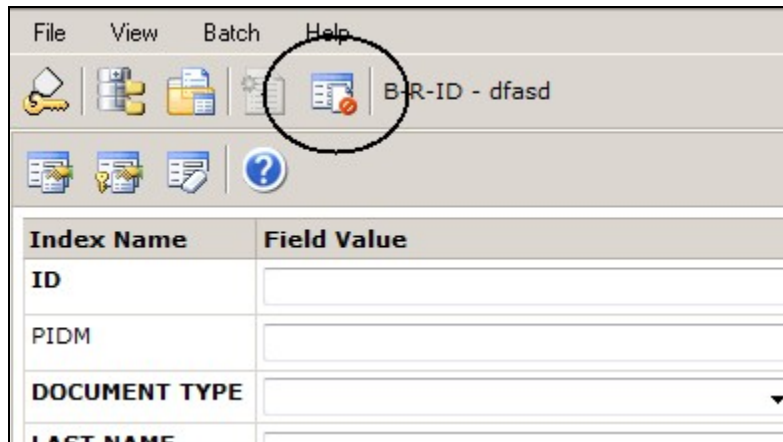
Copying batches from one application to another is a multi-part process:

- copy the batches from the source application (this creates a batch with the new pages),
- index the batch, and
- delete the batch from the original application.

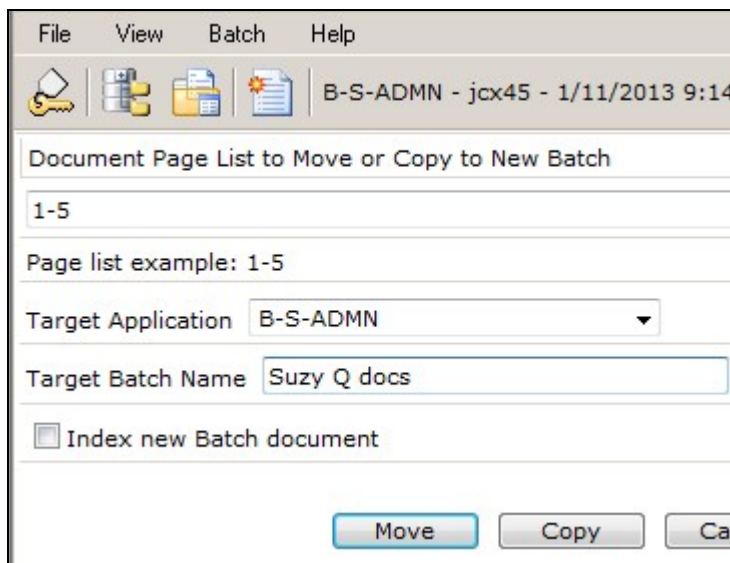
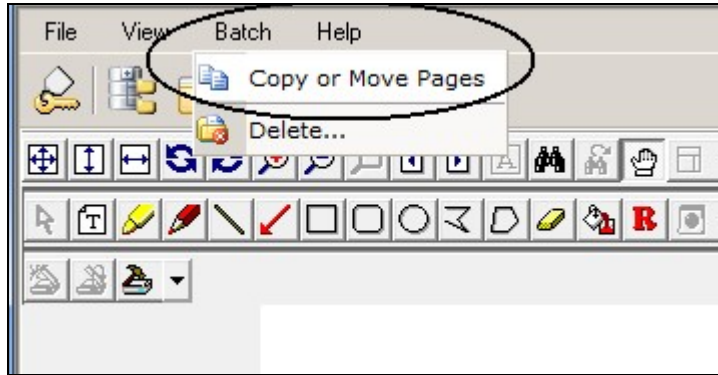
Note: If you move – rather than copy – the batches, you do not need to go back to the original document to delete the batch.

To move or copy batches:

1. Log into ApplicationXtender Web Access.
2. In Xtender, open the batch.
3. Click the **Return to Batch scanning** button.

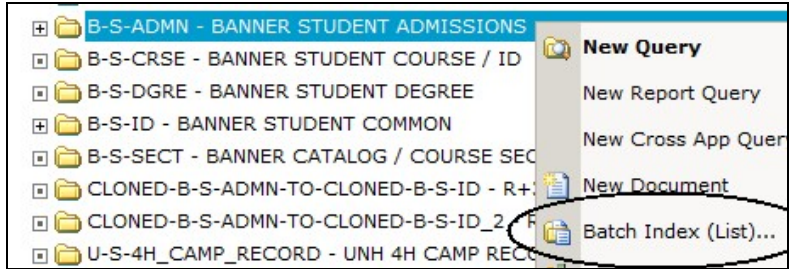


4. Follow the menu path: **Batch >> Copy or Move Pages.**



5. In the **Document Page List to Move or Copy to New Batch** field, select the pages to copy or move.
6. In the **Target Application** drop-down, select the application the batch should be created in.
7. In the **Target Batch Name** field, name the batch or accept the default.
Note: The batch name is temporary; it will not be seen in Xtender once the document has been indexed.
8. Click the **Move** or **Copy** button.
9. Close the batch you just exported from.
10. Return to the **Application List**.

11. Right-click on the application, and select **Batch Index (List)...** from the menu.



12. Select the batch you just created and index it.
Note: Refer to the Indexing documentation on the USNH Gateway page, if necessary.
13. If you did not move the batch in step 8, someone with privileges to delete batches should delete the batch from the source application.
14. Log out of ApplicationXtender Web Access.