Xtender

Scanning
&
Indexing

TEXAS TECH UNIVERSITY
Administration and Finance
Information Systems Management
TABLE OF CONTENTS

Introduction to Xtender ................................................................. 2
Gaining Access ................................................................................. 2
Terminology, Preparation, Getting Started ........................................ 3
Xtender Home Page ......................................................................... 4
Importing Documents ...................................................................... 4
Working the Batch Index .................................................................. 7
Batch List Options ........................................................................... 8
Import & Index Document ............................................................... 8
Selecting Document(s) to Index ..................................................... 9
Indexing Document(s) ................................................................. 9
Multiple Pages ............................................................................... 12
Annotating ..................................................................................... 13
Searching for Indexed Document(s) .............................................. 14
Navigating Search Results ........................................................... 15
Saving a Query ................................................................................. 16
Viewing a Document ...................................................................... 17
Attaching Pages to an Indexed Document ...................................... 19
Emailing from Xtender ................................................................. 20
Installing Xtender / Compatibility View Issues .............................. 22
Frequently Asked Questions ........................................................ 23
Viewing Xtender Access .............................................................. 24

March 2017
**Introduction to Xtender**

**Xtender** is used by Texas Tech University and Texas Tech University Health Sciences Center as a document management system. This document repository and imaging product provides the ability to capture, organize, and retrieve paper and computer generated documents. Xtender also provides users with the ability to make modifications to the stored documents by redacting sensitive data or adding notes. It is best used for long-term document archival.

Documents are scanned into Xtender either directly from a scanner or to a computer and then imported into Xtender. Once in Xtender, the document(s) are indexed with key words for easy retrieval when needed. The documents as housed in what are is called a folder /application/ filing cabinet. All terms indicate the location in which the document is stores.

Those who will be using Xtender must be given access to the system at the request of their supervisor. Users are given access to only those folders/ applications/ filing cabinet needed for their job responsibilities. Prior to gaining any access, the user must comply with the specific guidelines needed for each system. Refer to **How to Gain Access to Xtender** on requirements of each module.

**How to Gain Access**

**Student Records:**

- Complete FERPA Training prior to gaining access to Xtender Student
- Complete Banner Student / Banner Basics Training
  - Xtender Student access is granted after above steps are completed

**Finance / Human Resource Records**

- Requests for access should be submitted in a JIRA request to EAS.
  - The owner of the folder/application will submit approval to EAS.
    - Refer to this handout for instructions on how to submit a JIRA request.

**Miscellaneous Academic Department Records:**

Academic Departments across campus are utilizing Xtender to scan departmental documents to their own folders.

- Request for access should be submitted to EAS using a JIRA request
  - The owner of the folder/application will submit approval to EAS
    - Refer to page 23 of this handout for instructions on how to submit a JIRA request.
Terminology

- **Document Management System** – A centralized storage repository that includes tools for reliably creating, managing, searching, and securing documents over long periods of time
- **Index** – Key information / identity associated with a document that allows searching and retrieving of that document
- Document – A specific set of pages associated with a common index
- **Page** – An image, digital file, or other object that represents the content of a document
- **Batch** – A collection of documents/pages that have not been indexed
- **Application / Folder / Filing Cabinet** – Terms used to refer to the holding place of documents

**Preparation**

- Gather documents - sources for documents include Paper documents, Digital Documents (E-mail, Office Docs), Fiche / Film and Generated documents (i.e. from a Web Form)
  - Xtender is not a place to store HIPPA information
  - For PCI (Credit Card) information, mark out all but last 4 characters of card number, refer to OP62.06 Appendix F
- Prepare documents
  - Remove all paperclips and staples to avoid damaging the optical scanning surface of the scanner
  - Med tear and folds, especially on the leading edge
  - Separate the documents into batches according to their respective Xtender application (folder). If they are scanned into the wrong application, they have to be deleted and re-scanned into the appropriate application
- Equipment needed – copier / scanner / MFC device

**Getting Started**

Log into Xtender:

- **URL:**  [http://imaging.texastech.edu](http://imaging.texastech.edu)
- Raiderlink > A&F Work Tools Tab > Finance Channel > Xtender (Document Management)

User enters eRaider username and password

Once logged in, all **authorized** folders (applications) will be listed.
Xtender Home Page

Shown below is an example of what the user might find on the home page. The access given to the user determines which folders (applications) display. The user is able to import documents into or retrieve documents from the applications shown.

Importing Documents – Creating a Batch

Documents can be scanned to your computer and then imported into Xtender or they may be scanned directly into Xtender. These imported documents are called a “Batch” until they are indexed. The preferred method is to scan the document to a secure area on the user’s computer and then import the electronic file into Xtender.

There are two ways to import data into Xtender from your computer:

Option 1. Scan documents into Xtender for indexing at a later time

1. Select “File” in the top menu, select “Batch Import” from the sub menu

Or, right click on folder to import document into, select Batch Import:
Provide the “Batch Name” in field provided, select “Thin Client upload”

ii. Batch name – provide identifier for document(s) imported

iii. Auto-populates indicating when imported

iv. Check the Thin client upload box

v. Select Next to continue

Banner above “Import New Page” box provides “Folder” and “Batch Name” for document(s). To import:

1. Select Browse, locate document(s). Double click document to attach
2. Select Upload

The document can be indexed immediately by selecting the “New Page” icon as shown below.

If not indexed immediately the document will remain in Xtender and can be accessed later by selecting View and then Batch Index from the home page of Xtender
Working the Batch Index

The “Batch” must be indexed in order for others to access these documents in the application/folder/filing cabinet. The person responsible for indexing can access these documents by following either of the steps below:

1. Right click on the folder that holds the document(s), click “Batch Index

OR

2. Click on View, then select “Batch Index”:

The “Application Batch List” displays. Note the Current Application provides location of these documents.

- **Name** shows the Batch Name entered when importing; **Pages** refers to the number of pages in the document
- **Timestamp** shows when the documents were imported
- **Scanned by** shows who imported them into Xtender
- **State** defines if the documents are being worked by anyone or if available index (idle)
Application Batch List Options:

There are 5 menu options in the upper left of the Batch List pane that allow management of the batch:

- **Logout** - Logs user out of Xtender returning them to the eRaider sign in screen
- **Application List** – Displays the list of applications / folders a user can access
- **Delete Batch** – Delete a batch from list, first select check box to left of Batch Name
- **Reset Batch** – If a batch is stuck in “indexing” or “scanning” state; only those with admin rights can reset it to idle so that that others can complete work on it
- **Batch Import** – Create a new batch within work area
- **Refresh Batch List** – Refreshes the screen with latest list of batches

**Import & Index Document**

Some prefer to import a document and index it immediately. To do this, right click on the folder that will house the document, then select “New Document”.

---

March 2017
The window opens to the work area within Xtender. Select the drop down as shown below.

Notice the options provided:

- **Scan** – creates a document from the image your scanner generates. This method is best used with paper documents that are not yet in an electronic file
- **Clipboard Paste / Clipboard Paste Special** – allows pasting to document directly. Clipboard Paste pastes the data in default format; Clipboard Paste Special allows you to specify the format of the data
- **Import File** – bring document in from computer desktop

The document is imported directly into the work area for indexing.

- Indexing attaches key terms to document to be used as search criteria when retrieving document
  - Select the page icon shown below to begin indexing

---

**Cognos Tips and Tricks**

**Setting your Home Page.** You can select the default home page of Cognos to suit your reporting needs. For example, if you will be executing Finance Reports, you may want to set the TTU Finance Folder as your Cognos “Home”. To do this, navigate in Cognos to your desired “Home” page. Using the drop down to the right of the house icon in the top border, select Set View as Home. The next time you access Cognos the system will open to this page. Anytime you are in Cognos you click on the house icon and you will be returned to the Home Page.
Selecting Document to Index

- From the “Application Batch List”
- Click on the folder to the left of the Batch Name to bring the document(s) into the work pane for indexing

Indexing Documents

Indexing is the process of attaching identifying values (words) to the document that will be used as a search word identifier when retrieving the document at a later time. Some of the Indexed fields are pre-populated with a list of drop down values and other fields allow for entering identifying key words.

- All Index fields in **bold font** must be filled in before the index can be saved.
- Enter key words in appropriate fields as related to the document being indexed.
  - There is an auto populate feature which allows some fields to populate based upon entry of a person’s R#.
- Select “save” when finished

See Screen shots on the following page which show the Index Name, Field Value fields and Save options.
If when working with a document there is a need to modify the Index, choose the modify button which is located in the Index Field area. Make desired corrections, then choose save.

**Other Possible Newsletter Information:**

Reminder from Payroll Services: Departments, please have all your non-exempt employees submit their timesheets for the December 1st-15th pay period on time and approved by December 19th to avoid a delay on their December 22nd pay date. Employees who do not submit their timesheet timely will need a manual check request submitted by their department. Manual Check Requests for the December 1-15 period will pay on January 6, 2017.

**Holiday Schedule:**

TTU Holiday Schedule: December 23rd — December 30th

**Class Spotlight: Financial Management 101: Introduction to FOAP Codes**

Prior to attending Finance, Budget and Procurement classes, it is necessary to learn about TTU’s financial structure. This course provides an overview of the structure, codes, expenditure guidelines and available budget balances. During this class you are introduced to key concepts and terms that are foundational to your job duties as related to finance processes. This class is a pre-requisite to many classes offered by AFISM. Learning outcomes provided during this session include:

- Discover the purpose and use of the FOAP Codes for their department
- Discover the differences in funds, budgets, and associated managers
- Review terms and procedures common to Texas Tech’s financial system
- Review the fiduciary responsibilities of financial managers

**Question of the Month – How can I tell if I have access to Xtender?**

Utilize the “Modify” button to edit the saved index.
Multiple Pages

If the document has more than one page, after the first page is indexed, the second page will appear, continuing to display page by page until indexing is finished. Rather than index each page one at a time, utilize the icons above the Index Name Field to index more efficiently.

- This icon is used to attach the currently displayed page to the previously indexed page.
- This icon is used to attach all pages in the batch to the previously indexed page.
- This icon allows to clear the values appearing in the index.
- This icon returns user to Batch List to select another batch to process.
- This icon clears the indexing values and allows to be processed as a separate page / document.
- This icon allows scanning additional pages into current batch being processed, with option to place new page(s) in front of or behind current page or to append the current document.
- This icon allows viewing of last indexed document.

When the indexing of a document has been completed the user will receive notice below. Choose desired option from the list within:
**Annotating**

Use the icons above the document to annotate if needed. This can be done while indexing or while viewing a document.

- **Select** – Select an individual annotation to work with
- **Add Text** – Add a text annotation to the document
- **Annotate** – Highlight/Draw on the document
- **Create Shapes** – Create a shape on the document. Can be filled with the paint bucket and used with the paint bucket and redaction tools to create a redaction.
- **Paint Bucket** – Fills a shape
- **Redaction** – Use with shape and paint bucket tools to create an opaque, unmovable, shapes. **Can be used to hide certain kinds of sensitive info (not good for hiding credit card numbers).**
- **Rubber Stamp** – drop down of annotation options to “stamp” documents (department specific).
- **Eraser** – Erase an annotation
- **Toggle Annotations On/Off** – Display the document with or without annotations
- **Line Style and Color** – Change line, shape or pencil color and width. Change font color and size.
- **Delete, Save, Undo** – Delete, save, or undo annotations
- **Send To Front/Send to back** – Ability to layer order of annotations/stamps on the document.

1. Once you have completed uploading your file, click on the “New” button located on the

Specifying a Document Type

NOTE: Refer to the “ePAF Required Attachments and Corresponding Document Types” list to select the appropriate Document Type.
Searching for Indexed Document

From the Application page of Xtender, select Edit > New Query

Or, Right Click on the desired folder for the query, then select New Query

On the Query Criteria Screen, enter the key search words in the Search Value field

- The asterisk * is used as a wildcard to help with your search
- Click “Submit” or hit “Enter” to start query
Navigating Search Results

All documents indexed with the submitted search criteria will display.

- If the search returns too many results, utilize the [Modify Query] link in the far upper right of the query results and enter different criteria
- To view a document double-click on the document row

From the Query Results screen you may email, print a document, search for text within a document and with proper permissions you may delete documents.

Select document(s) using the check box, choose icon to apply desired action

- **Print Selected Documents** – Print all selected documents
- **E-mail Selected Documents** – E-mail all selected documents
- **Open Selected Documents** – Open all selected documents (this essentially allows the user to move through only the selected documents using the next and previous document buttons)
- **Delete Selected Documents** – Delete all selected documents
Saving a Query

A query can be saved for everyone in the department can quickly access the documents needed:

- Enter the desired query values in the Search Value field
- Provide a Query Name
- Select “Available to All Users”
- Select Save

To execute a saved query:

- Open the application folder, by clicking on the + plus to left of it
- Right click on Query Name
- Select Run
**Viewing Document**

To view a document, double click on the document in the query results screen.

The document opens in the view pane. From here, it is possible to print, email, annotate, append, as well as apply other actions to the document.

Some of the icons used in document management include:

- **View Index** – Open the index fields for a document for viewing/editing.
- **View Thumbnails** – View a list of pages as thumbnail images/pages. Ability to re-order within this screen for multi-page documents.
- **Fit to Screen** – Adjust the image to fit 100% within the screen.
- **Rotate** – Rotate the document.
- **Zoom & Magnify** – Zoom in/out or magnify sections of the document.
- **Print** – Print the document. The button on the left prints the current page. The button on the right will print the entire document or a range of pages within the document.
- **Page Functions** – This menu contains all functions related to individual pages (Add, Delete, etc.).
- **Query Results** – Displays results returned from last query.
- **New Query** – Starts a new query from scratch.
- **Next Result** – View the next document from the Query Results list.
- **Previous Result** – View the previous document from the Query Results list.
Shown below is the view the user has when working with a document as well as location of some of Xtender’s features when viewing a document:

- **Query Results** icon directs user back to list of documents found in search
- **Icons** that are active may vary between users based on security access
- **Next Page** identified in lower tool bar, use designated icons to move between pages
- **Scroll Bar** on right provides movement within document page

**THE RESULT:** The document selected will be displayed.

Click the **Query Results** icon to go back to see all the documents

**Hover:** When the hand is displayed on the document, hold down the left button on your mouse then you can move the document up and down on the screen.
Attaching Pages to an Indexed Document

If the document is not already in the view pane, query for document and bring into view screen. Navigate to the page where new page will be entered. Index of document will be attached to new page.

- Choose menu icon
- Select New page – Scan or Import File
- Select Insert After / Insert Before / Append

Emailing From Xtender

You can email up to 10 Megabytes of images from Xtender. Due to normal mail restrictions, larger files are not allowed. This means larger documents, usually 15+ pages, will not go through. You will receive an email message when the file is too large. Documents may have to be sent in multiple emails.

The first time you attempt to email a document from Xtender, you might need to enter in your email address (it must be your TTU.EDU or TTUHSC.EDU email address), then click OK:

You will receive an email notification with an Email Registration Code:
Copy and Paste, or manually type in the Email Registration Code in the **Confirmation Code** field, and then click **OK**:

![Email Address Confirmation](image)

**Emailing a Document from Query Results**

From the Query Results page, select the document(s) to be email by clicking inside the check box to the left of the document

1. Choose the Email icon in the toolbar

![Query Results for Application 'AFISM-TRAINING- STUDENT'](image)

Complete Email as desired

- Note that any annotations made on the document can be hidden if desired.

![Email Selected Documents From Resultset](image)
Emailing from View Pane

From the “view” pane, select “Document” then “Mail Document” from the drop-down menu.

Enter Recipients email address, provide subject line and select send.

Send Email Status displays and shows email is being processed:

Once email is successfully sent, the status displays successful. Close window.
Installing Xtender / Compatibility View Issues

If you installed Internet Explorer 11 (IE11) on your web browser, or any other newer version, this could cause Xtender to look different. The icons could come up missing and the layout is at the top is different. Below are the steps to troubleshoot if you run into these issues.

**To make Xtender compatible with IE 11:**

- Click on the **Tools** icon on IE 11 browser (top right corner of browser)
- Click on **Compatibility View Settings**

- In the **Add this website box**, type in **texastech.edu** and click **Add**.
  - Type in **ttu.edu** and click **Add**.
  - Click **Close**

The correct layout will display all of the icons available on the toolbar:
**Please note that only IE 8.0 or higher supports the full interactive functionality. All other browsers only operate in thin client mode (limited functionality).**

## Browser Support

The following table shows the compatibility of web browsers with ApplicationXtender components.

<table>
<thead>
<tr>
<th>Browser</th>
<th>ApplicationXtender Web Thin Client</th>
<th>ApplicationXtender Web Interactive Client</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chrome 35.0 for Windows, Chrome 35.0 for Mac 10.6</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Firefox 30.0 for Windows, Firefox 30.0 for Mac 10.6</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Internet Explorer 8.0, 9.0, 10.0, 11.0 for Windows*</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Safari 5.1.7 for Windows, Safari 6.1.3 for Mac 10.6</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

* ApplicationXtender Workflow Manager 7.0 SP1 supports only Internet Explorer 9.

## Frequently Asked Questions

### I received a message of Webpage has Expired?
If you click on the Back and Forth button on your Web Browser, you could receive a message of “Webpage has expired”:

- **Internet Explorer (IE):** Press the `<F5>` key, then click **Retry** on the pop-up window. This should bring up Xtender again.

### Where do I get help?
All other technical issues with Xtender should be reported to the help desk at your institution using one of the following methods:

**TTU - IT Help Central**
- Phone: (806)742-HELP (4357)
- E-mail: ithelpcentral@ttu.edu
- Online: [http://www.depts.ttu.edu/ithelpcentral/assistance_request.php](http://www.depts.ttu.edu/ithelpcentral/assistance_request.php)

**HSC - IT Solution Center**
- Amarillo: (806) 354-5404 helpdesk.amarillo@ttuhsc.edu
- El Paso: (915) 545-6800 elp.helpdesk@ttuhsc.edu
- Odessa: (432) 335-5108 helpdeskodessa@ttuhsc.edu
- Lubbock: (806) 743-1234 ITSolutions@ttuhsc.edu
Need additional Training?
If you feel that you need additional training over the navigation of Xtender, you can contact AFISM and a representative will contact you to schedule training:

- AFISM | 742-KNOW | afism2know@ttu.edu

How do I get access to the folder(s) that I need?
The links below were created to allow you one click access to open a JIRA to submit a request for Xtender. Each link requires that the Summary and Description be filled out prior to clicking create. Use the links and steps below to submit your requests.

- **Summary:** Summarize your request for Xtender (name of the folder, etc.)
- **Description:** Provide details of what you need assistance with in Xtender i.e. the folder you would like created, your eRaider username, level of access you would like for the users (supervisor will request for user, etc.)
- **Click Create**

Click below if you are requesting access to an existing Xtender folder:
https://jira.texastech.edu/secure/CreateIssueDetails!init.jspa?pid=12510&issuetype=13&priority=4&components=12906

Click below if you are requesting a new Xtender folder be created:
https://jira.texastech.edu/secure/CreateIssueDetails!init.jspa?pid=12510&issuetype=13&priority=4&components=12907

Click below if you are requesting modification to an existing Xtender folder:
https://jira.texastech.edu/secure/CreateIssueDetails!init.jspa?pid=12510&issuetype=13&priority=4&components=11514

EAS will then contact the appropriate owner of each application (folder) and will email you information that:
- Your request has been approved and access has been set up, or
- Additional information is needed prior to granting access

A Jira is shown on the following page.
Create Issue

Project: RD - Xtender (XT)
Issue Type: Request

Summary: Access Request

Attachment: Drop files to attach, or browse.

Description:

Please Grant Access to (provide folder(s))

To: Provide Name, R#

Provide type of access desired: Options are Browser, Update, Master

Assignee: Automatic

Priority: Normal

Labels

Component/s: Permissions/Security Request

Resolution: Fixed

[Create]
**Viewing Xtender Access**

Access within the Xtender application is granted by folder/application level. Each folder is managed by one user who requests/grants access. To view your level of access within each folder(s)/application(s), follow these steps:

1. Login to TeamApp:
   - Raiderlink>A&F Work Tools Tab>AFISM Portlet>TeamApp
2. Click on the left sidebar menu.
3. Enter ERaider ID in field provided, select Xtender Groups
   - ![ Xtender Groups with eRaiderID and Xtender Groups buttons ](image)
4. The folders you have access to are shown, followed by your access level

**User access is granted and managed through the department based on business need. The number of folders/applications will vary by user and department.**