

Xtender

Scanning and Indexing

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Introduction to Xtender

Xtender is used by the Texas Tech System, Texas Tech University, Texas Tech University Health Sciences Center - Lubbock and Texas Tech University Health Sciences Center – El Paso 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 entered by accessing Xtender from Banner or 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 are housed in what is called a folder /application/ filing cabinet. All terms indicate the location in which the document is stored.

Supported Files

The Document Viewer displays the content of support file types. Natively supported file types include: text files, Computer Output to Laser Disk (COLD) documents, Enterprise Report Management (ERM) files, image files (JPEG, GIF, TIFF, etc.) Rich Texas Format (RTF) files, HTML, XML and PDF files.

You can add annotations to image, text and PDF files and you can also print, email and export these files.

When files that are not natively supported by Xtender are imported such as Excel and Word Documents, they are stored as a foreign file in their native file format. These pages are represented in the system as a link. Annotation buttons, zoom controls and the rotate function in the system are not available for these files. You can print, export and email them.

How to Gain Access

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.

Student Records: TTU

- 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

Functional Departments and Miscellaneous Academic Department 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 page 23 of this handout for instructions on how to submit a JIRA request.

HSC Lubbock and El Paso Records:

- Complete FERPA Training
- Request Xtender access through TeamApp
- Supervisor of requestor will approve 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
 - Mend 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

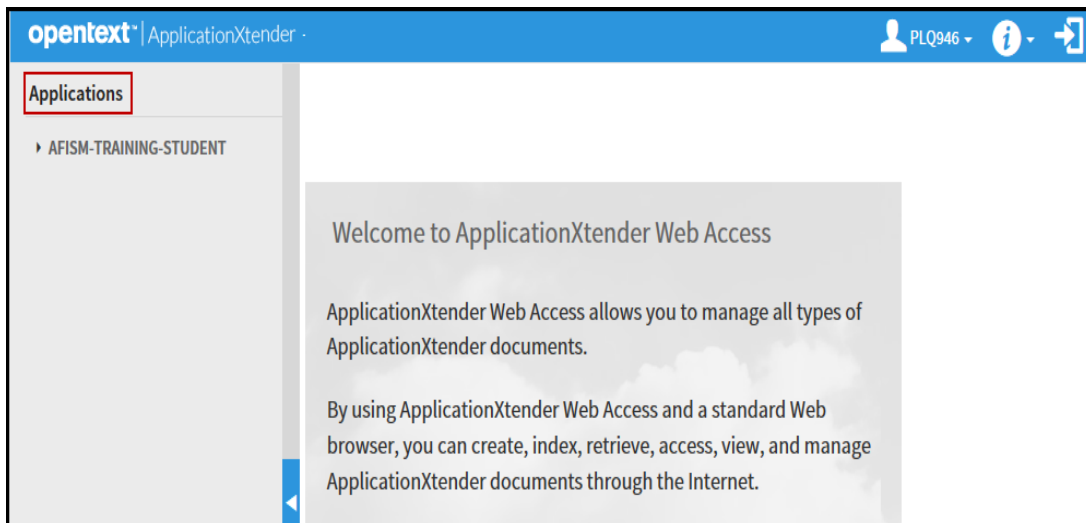
Log into Xtender:

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

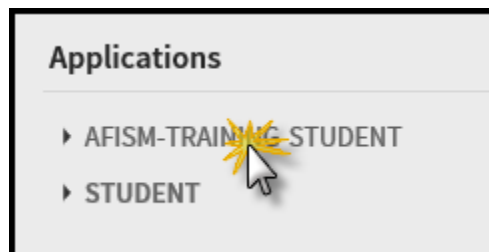
User enters eRaider username and password. Once logged in, all **authorized** applications (folders) will be listed.

Xtender Home Page

Shown below is an example of what the user might find on the home page. Notice the “Application” label in the left menu. The folders (applications) that the user has access to display below the label. The access privileges that are granted to each user control the documents that you can access within ApplicationXtender Web Access and the functionalities that are available when you work with documents.



To access a specific folder, click on that folder in the application list.



Application (Folder) Home Page

AFISM-TRAINING-STUDENT ← Folder housing the documents

5 6 7

1 2 3 4

NEW QUERY NEW DOCUMENT NEW BATCH MANAGE BATCHES

Saved Queries 8

Name	Created By
Find 012345678	MVK763
All R #	VGT915
Ashley's Test Query	DCT206
Snigdha Test	IQP605

Recently Created Documents 9

Document Title	Created Time	Created By
R11111111	2018-07-24 11:39:36	Jill Lindsey (jilindse)
R11111111	2018-07-24 11:35:47	Jill Lindsey (jilindse)
R88888888	2018-07-24 11:14:33	Jill Lindsey (jilindse)
R88888888	2018-07-23 15:14:40	Jill Lindsey (jilindse)
R88888888	2018-07-17 16:48:07	Jill Lindsey (jilindse)

The folder housing the documents is identified in the upper left pane of the window. Within this view are the following options:

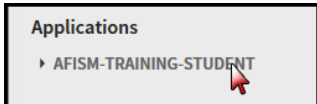
- (1) New Query – Create a search for documents in the folder.
- (2) New Document – Import and immediately index a new document.
- (3) New Batch – Import document(s) with option to index now or index later
- (4) Manage Batches – Index saved batches, delete or edit the batches, and reset status of batch.
- (5) Access to links to import a new document, import a new batch, and manage a batch.
- (6) Execute a new query within selected folder or within multiple folders.
- (7) Opens the last document indexed in the view pane.
- (8) Saved Queries – Frequently used queries created for all who have access to the folder to execute.
- (9) View recently created documents by clicking on the Document Title.

Importing and Scanning Documents

Documents can be scanned to a computer and then imported into Xtender, or they may be scanned directly into Xtender, or imported from Banner. The import may be completed as a “New Document” or as a “New Batch”. If a “New Document” is selected, you will import the document into the system and immediately index it. If you select “New Batch”, you have the option of indexing it immediately or keeping it in a “batch” status to process later.

New Document

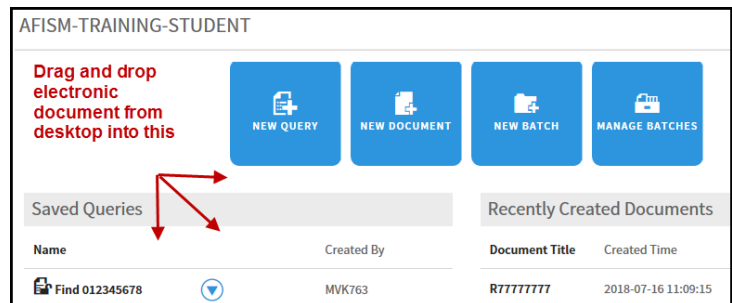
Select the application that will house the document



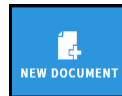
Bring the document into Xtender using one of the following options:

1. Drag and Drop from Desktop

While in Application Folder, drag and drop the electronic file or files from your desktop into the main panel.

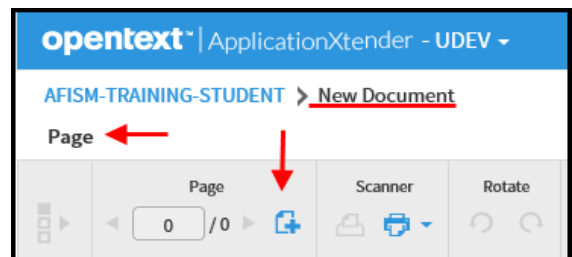


2. Import from Desktop

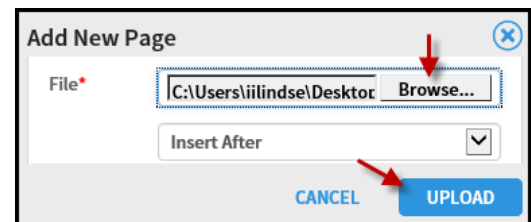


Select the “New Document” icon

a. In window that opens, select “Page” in either location:



b. Select “Import File”. Browse your desktop to find the document and upload.



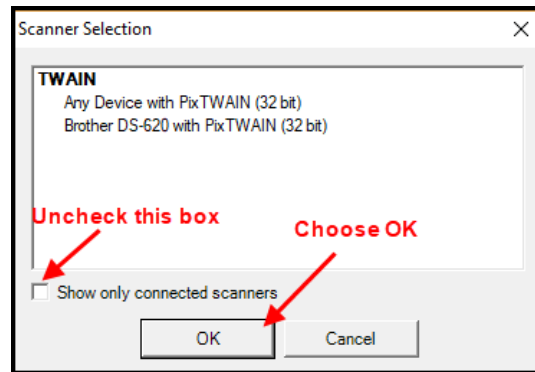
3. Scanning into Xtender

With a scanner connected to your system, you can scan directly into Xtender.

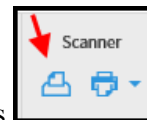
- a. Select the scanner. Click on the icon (not the dropdown) as shown with the arrow below.



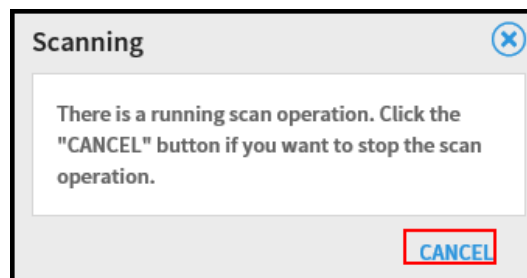
- b. In Scanner Selection box, uncheck “Show only connected scanners” then choose OK



- c. Load documents into Scanner, select scanner icon on left side of options



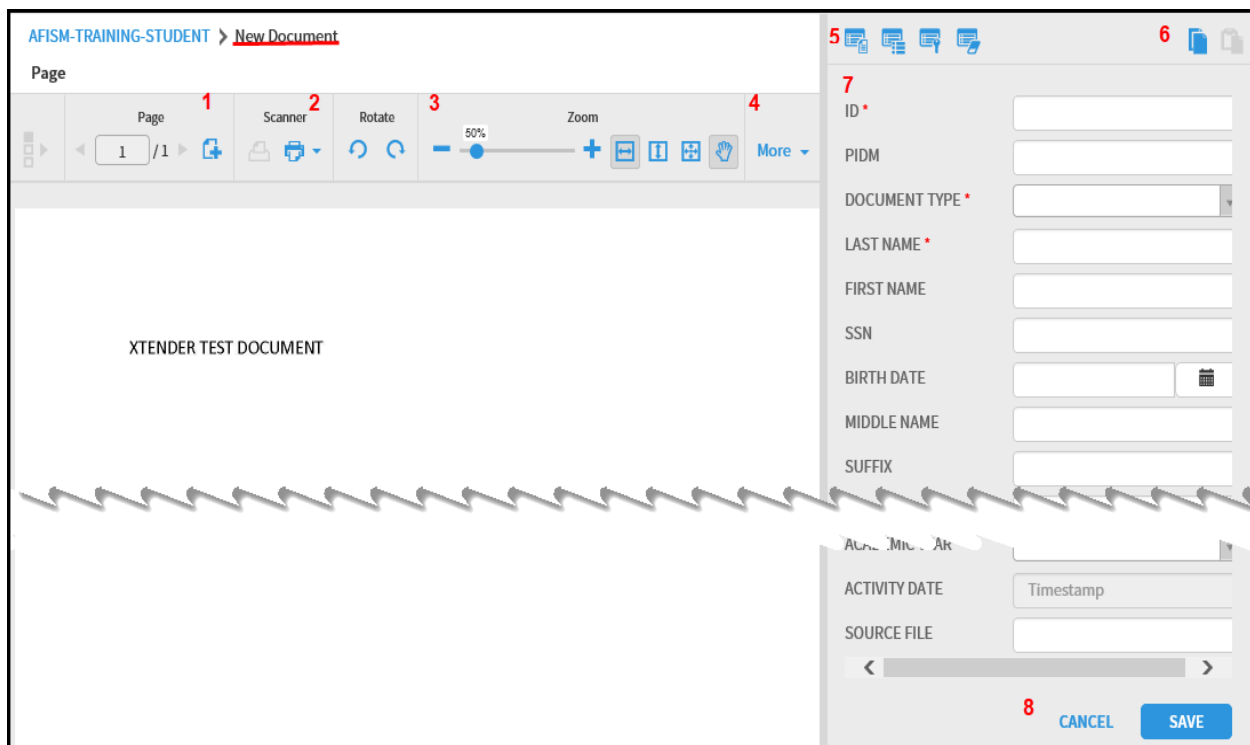
- d. When all pages have been scanned, select CANCEL.



Managing the Document

Using one of the import methods described above, the document will be visible within the view pane. The options within the view pane include:

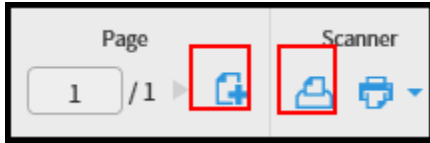
- 1 –“Page” Icon to add a page or pages to current document
- 2 – “Scanner” Icon to scan pages to current document
- 3 - Positioning document icons are located in the tool bar above the document
- 4 – “More” dropdown to locate tools used for anotating document
- 5 – Indexing options such as clear index, populate with last used index, search recently used indexes
- 6 – Supports Copying of the index
- 7 – Index field for enter key words that will be used to search for document. Those with an asterick are required
- 8 – Supports Saving or Cancelling the index



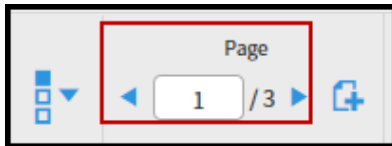
Adding Pages to Document

The pages that are added will inherit the index of the document they are appending.

- Drag and drop additional pages from desktop, or:
- Select page or scanner option if added pages using those methods

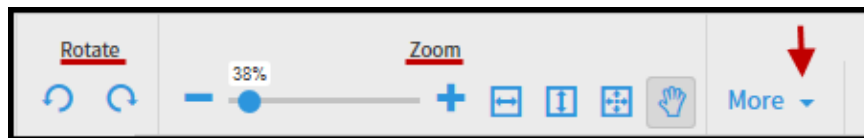


- Browse and locate document, select location, select upload as directed in “New Document” section, page 7
- Scan document in as directed in “New Document” section, page 8
- Once uploaded, “Page” shows number of pages within document with directional arrows for navigating between pages



Positioning and Annotating

- Rotate document to reposition if necessary
- Use sliding bar to zoom document, or select plus (+) to increase and minus (-) to decrease
- Use directional arrows to fit document to screen



- Select “More” to access annotation options

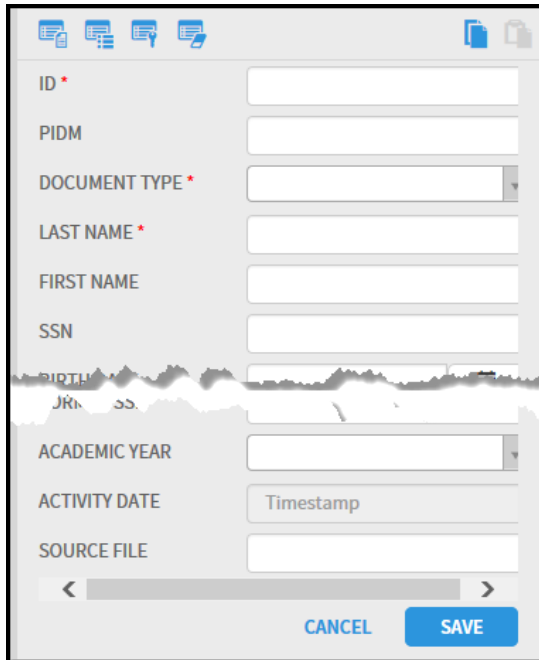


- Within “Annotation”, select desired option and use “Format” options as needed
- Within “Actions” you may erase the annotation, save them or reverse previous actions


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 fields are pre-populated with a list of drop down values, and other fields allow for entering key words. The more detailed and specific the index, the easier it is to retrieve the document.

- All Index fields with the asterisk (*) 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, or "Cancel" to delete document

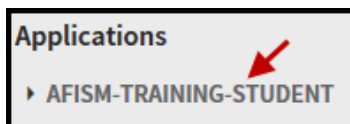


A screenshot of a web-based form for indexing documents. The form contains several input fields: ID *, PIDM, DOCUMENT TYPE *, LAST NAME *, FIRST NAME, SSN, BIRTH DATE, JRN SS, ACADEMIC YEAR, ACTIVITY DATE (with a 'Timestamp' label), and SOURCE FILE. At the bottom of the form are two buttons: 'CANCEL' and 'SAVE'. The form is partially obscured by a torn paper effect.

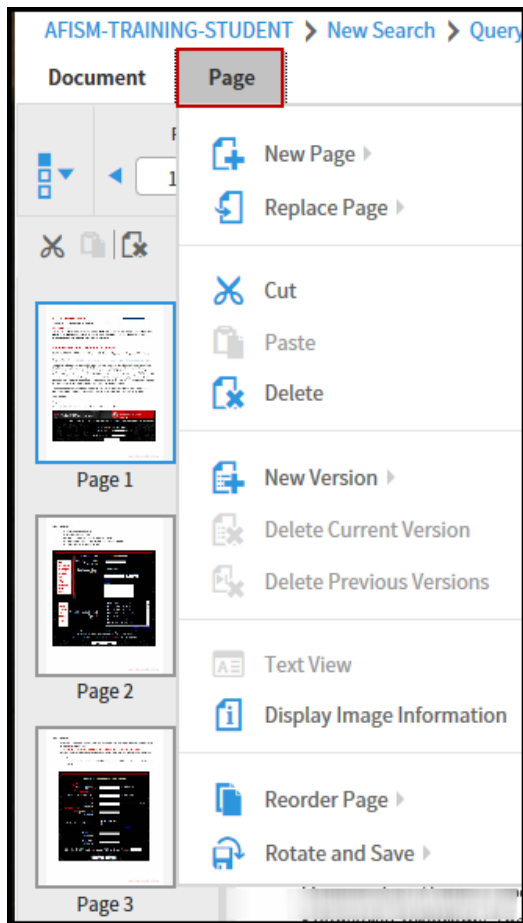
- Select "Modify"  at the bottom of the indexed document to make changes.
- In the upper left of the view pane are options to search for text within the document or to email, export or print the document.



To return to the "Application List", select the Application in the top left of the view pane.



Working with Pages



Adding Pages:

- To append new pages to the end of the document, drag and drop the electronic file(s) from your desktop into the open document area.
- To insert new pages before or after a particular page in the document, select the page thumbnail then drag n drop into the thumbnail section. Also, from the Page menu, select New Page, browse and select desired electronic file and choose where you want to load the new pages.
- Select upload
- When you add a mail file (.MSG format) to a document, you can choose to add the mail attachment as new pages. When you do so, the new uploaded file will be split into several pages, depending on how many attachments the file has. The user setting **Import Email Attachment as New Page** enables or disables this function.

Scanning Pages to Documents

Pages can be added to documents by scanning (New Page, Replace Page and New Version).

- For New Page, scan and insert the scanned pages before or after the current page or append to the current document
- For Replace page, scan and replace the current page with the scanned page (only the first page scanned is used to replace the current page)
- For New Version, scan and create a new page version for the current page page (only the first page scanned is used to replace the current page)

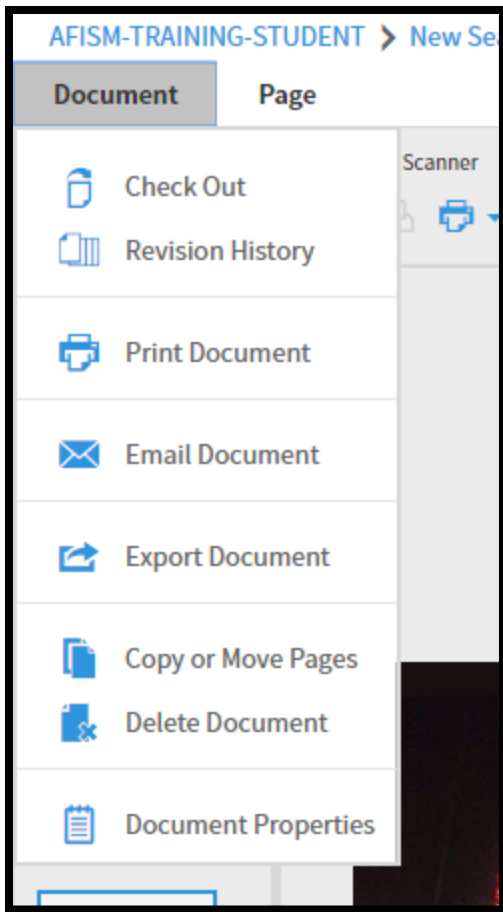
Reordering Pages

Pages can be moved within the document by using this feature. Move them up down, to the first or last position, also can be done by dragging and dropping in the thumbnail section.

Rotate and Save

If pages were imported in wrong position, use this option to correct, then save changes.

Working with Indexed Documents

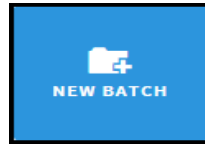


Indexed Documents:

- **Check-in / check-out mode:** When you check out a copy of the document, it remains your working copy until you check it back in. This process creates new versions of the document while maintaining older versions and prevents another user from making changes to the same document simultaneously which could result in data loss.
- **Revision History:** When multiple versions of a document are created, a record is created. This lists the revisions that have been made, who checked in the revision, the date the revision was made, and displays any comments.
- The system allows documents to be **printed, emailed** or **exported**.
- You can **Copy or Move** document pages between ApplicationXtender applications. The pages are processed as a new batch in the target application.
- **Delete Document:** A document may be deleted from the view pane of a query by selecting the Delete icon. Special privileges may be required for this.

New Batch

When a document is imported as a “Batch”, it can be indexed immediately or later.



1. Select the “New Batch” button.

A dialog box titled "Upload New Batch" with a close button (X) in the top right corner. It contains three input fields: "Application*" with a dropdown menu showing "AFISM-TRAINING-STUDENT", "Name*" with a text box containing "Test 1", and "Description" with a text box containing "This is optional". At the bottom, there are two buttons: "CANCEL" and "CONTINUE". A red arrow points to the "CONTINUE" button.

- Select “Application” to house document
- Provide a name for the batch
- Provide description if desired
- Select continue

e. The view pane opens with the Folder and Batch Name indicated.

- Load page(s) or document(s) by desired method
 - Drag and drop, upload from desktop, or scan)

The document will be visible in the view pane. The document can be indexed immediately or at a later date and time. Above the document the following options are available.



- | | | |
|-----------------------|-------------------------|-------------------|
| 1. View Thumbnail | 4. Delete Document | 7. Delete Page |
| 2. New Document | 5. Previous / Next Page | 8. Scan |
| 3. Copy or Move Pages | 6. Add Page | 9. Select Scanner |

To index the document upon upload, select the New Document icon and follow the steps outlined on page 11 titled “Indexing Documents”.

Manage Batches



All documents that have not been indexed are accessed via “Manage Batches”. They are stored by name, description; time of upload, the Oracle ID of who uploaded batch, number of pages and current state of the batch. The “Batch” must be indexed in order for others to access these documents.

<input type="checkbox"/>	Name	Description	Create Time	Created By	Pages	State
<input type="checkbox"/>	Test 2		2018-08-13 16:12:54	PLQ946	1	Idle
<input type="checkbox"/>	Test 1	This is optional	2018-08-13 15:58:29	PLQ946	28	Idle
<input type="checkbox"/>	Batch 01	Employment docs	2018-07-24 16:27:18	PLQ946	1	Idle

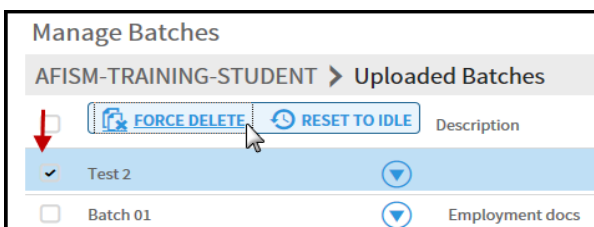
Select a Batch for Indexing

To select a batch to index, double click on the batch within the Name column or open the drop down to the right of the desired batch and select “Index”. Follow steps on page xx of document for indexing.



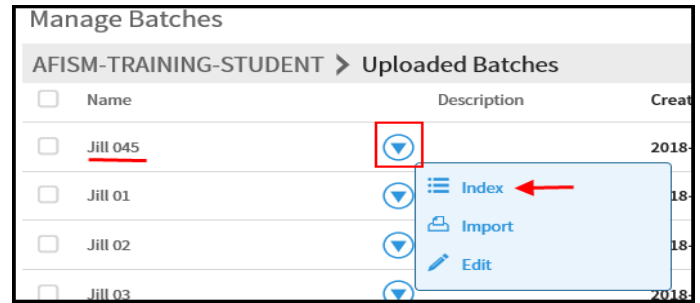
Delete a Batch or Reset to Idle

Select the desired batch(es) by clicking in the check box. From option pop-up, select desired action. To delete all batches, select the checkbox labeled Name above the list of documents. Choose option from pop-up



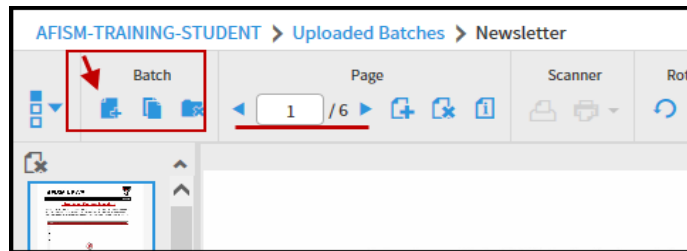
Indexing Documents from Manage Batches

Select the multi-page document from the “Manage Batches” area that is to be indexed, using drop down to right, choose Index.

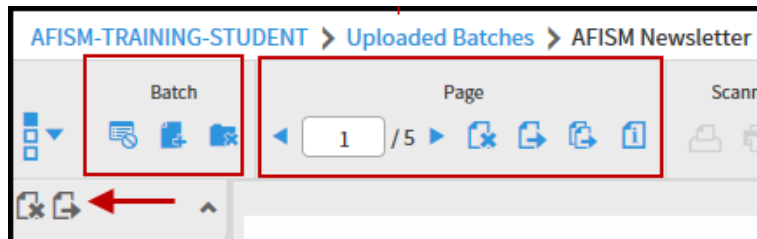


The Batch Index toolbar appears with the first page of the batch in View Pane. Index page as desired, choose save.




- After page 1 is indexed, each following pages can have the the same index or a different index.
 - To change index, select New Document and index page as desired.







- Manage the rest of the document with the options in “Batch” or “Page”



“Batch” Options:

-  Cancel indexing. Document remains in “Manage Batches” area for later indexing
-  Create a New Document
-  Delete remaining batch from the system

“Page” Options:

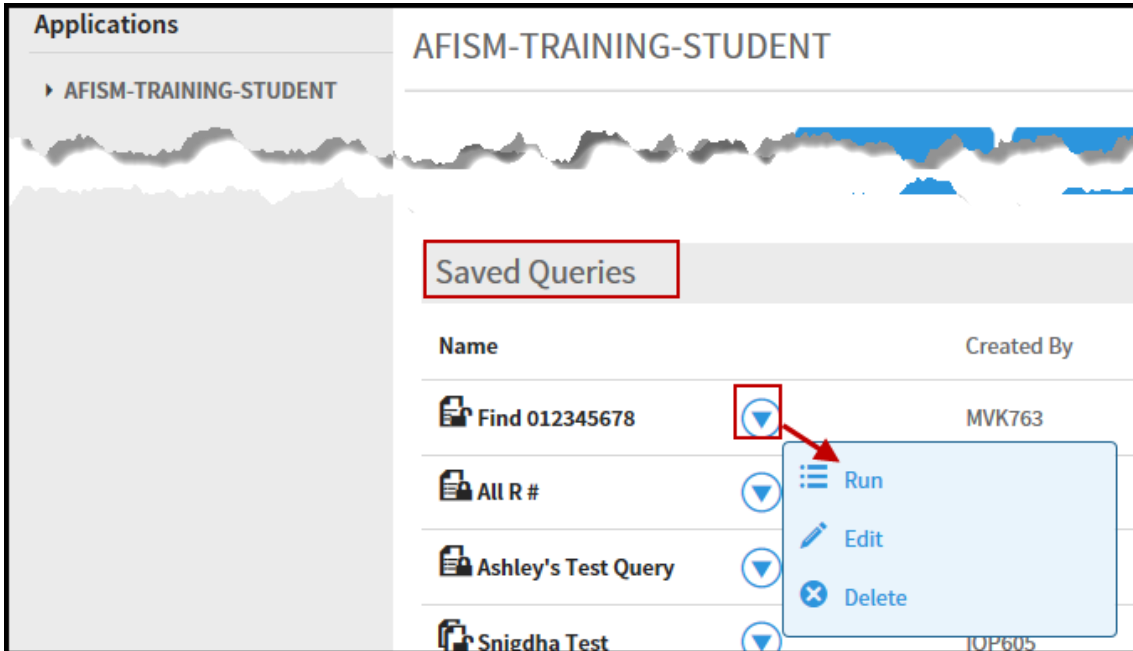
-  Select desired page for indexing
-  Delete page in view pane
-  Add current page in view pane to previous page with same index
-  Index all pages of document with index used on page 1

Querying a Document

A query is a search for a document that is stored in a folder within Xtender.

Saved Queries

A saved query can be private or available for all users. These queries are housed under the application for which they were created as shown below. A locked-padlock icon to the left of the query indicates that the query is private. An unlocked-padlock icon means that all users can access and run the query, by selecting the drop down and selecting “Run” as shown below. Notice that the query can also be edited or deleted.





New Query

To start, select the Application from the tree prompt that you want to query.



Once inside the application, select the button “New Query”

Enter search terms in the index field(s) to filter your results.

- Multi select fields provide drop down when activated
- Search a range of values by selecting the icon  to the right of the index field
- Search a list by selecting the icon  to the far right of the index field

A screenshot of a web application search interface titled "New Search - AFISM-TRAINING-STUDENT". The form has a header "Search Criteria" and a sub-header "Enter a search term in the index fields to filter your results." Below this are several input fields: "ID", "PIDM", "DOCUMENT TYPE" (with a dropdown menu showing "Multiple select / Input and enter"), "LAST NAME", "FIRST NAME", "DEPARTMENT", and "ACADEMIC YEAR" (with a dropdown menu showing "Multiple select / Input and enter"). To the right of each input field are two small icons: a range search icon and a list search icon. At the bottom of the form are three buttons: "RUN" (blue), "SAVE" (white with a red border), and "CANCEL" (blue).

- Select Run to execute the query
- Select Save to save the query for others who have access to the application to use

Query Results

The results of the query are displayed as shown on the following page. There are multiple options available with the documents that are retrieved.

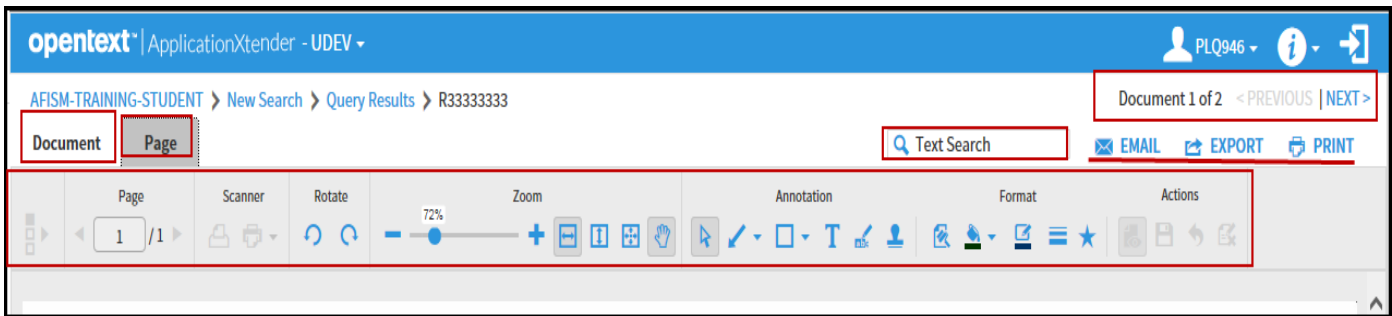
The screenshot shows a 'Query Results' interface for 'AFISM-TRAINING-STUDENT'. At the top, there is a search bar with 'Text Search' and a refresh icon. Below the search bar, a row of action buttons is visible: 'Open', 'Delete', 'Export', 'Print', and 'Email'. A table of results follows, with columns for 'ID', 'TYPE', 'LAST NAME', 'BIRTH DATE', and 'MIDDLE NAME'. The table contains six rows, each with a document icon, a dropdown arrow, and a checkbox. A red box labeled '1' highlights the first checkbox. A red box labeled '2' highlights the first three checkboxes. A red box labeled '3' highlights the dropdown arrow of the fourth row, which has a context menu open showing options: 'Open', 'Print', 'Email', 'Delete', 'Export COLD', and 'Ad Hoc Text Search'. A search bar at the bottom right contains the text '4 Text Search'.

ID	TYPE	LAST NAME	BIRTH DATE	MIDDLE NAME
<input type="checkbox"/>				
<input checked="" type="checkbox"/>	R33333333	GRADUATION SURVEY		TEST
<input checked="" type="checkbox"/>	R33333333	CHANGE		TEST
<input checked="" type="checkbox"/>	R33333333	DEMIC TRANSFER		TEST
<input type="checkbox"/>	R33333333	MISSION APPS		TEST
<input type="checkbox"/>	R33333333	HIVAL		TEST
<input type="checkbox"/>	R33333333	OTOS		TEST

1. Select all documents returned in the query. Then apply desired actions as shown in the box as labeled – open, delete, export, print or email
2. Select one or more documents and apply desired action within the box described above
3. Select a single document and using the drop down to the right, access the options available for it.
4. Enter text search that will be executed for all documents returned in query

Viewing a Document from Query Results

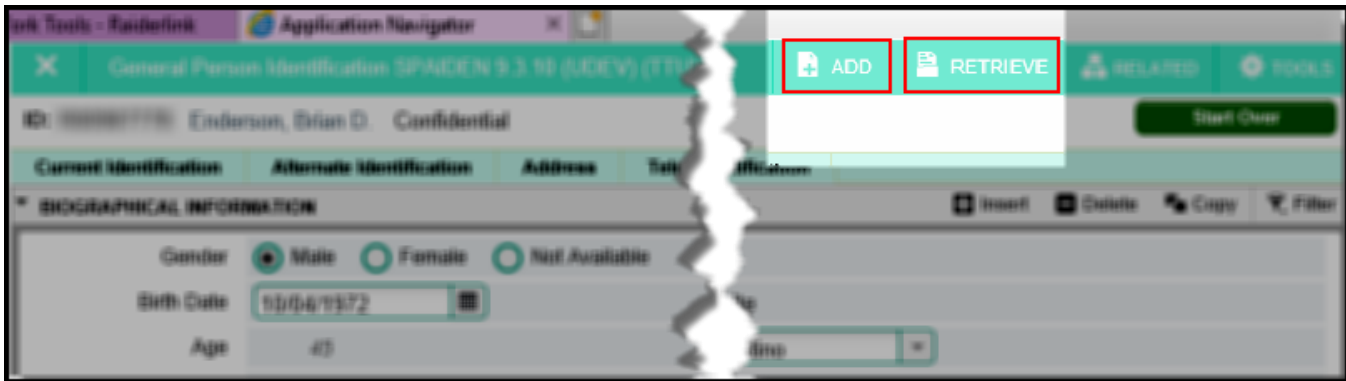
Once a document(s) is selected and the option to “open” is chosen, that selection opens in the View Pane of Xtender. Following is information about the functionality of the options available from the View Pane when document(s) have been opened from a query.



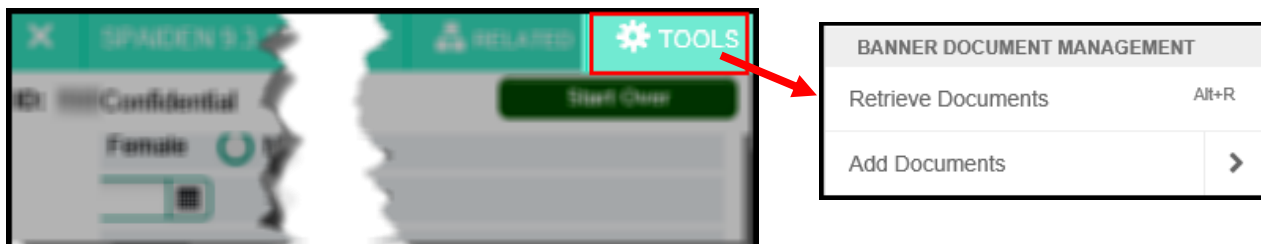
- Application List, New Search, or Query Results are active links
- On the Right, you’ll see “Document 1 of 2”, this is where you can view the next or previous documents from your query search
- Document tab: See page 13 for more information
- Page tab: See page 12 for more information
- Page: See page 9 for more information
- Scanner: See page 8 for more information
- Zoom, Annotations, Format and Actions: See page 10 for more information
- Text Search the document for a specific word, number, or phrase
- Email, Export and Print the document

Banner to Xtender

Xtender can be accessed via a form within Banner. This provides for efficient flow of work processes. From the Banner form, access Xtender by following the steps below:



- Select “Add” to add documents to Xtender
 - You will be directed to the home page of Xtender. Select the desired application from the menu and follow the steps on page xxxxxxx of this document to add documents to Xtender.
- Select “Retrieve” to Query Xtender from a Banner form.
- The query can be executed at block-level, item-level, or item-value-level, by placing the cursor at the appropriate location on the form.
 - A query from most key blocks returns a set of documents related only by ID. Most forms are delivered with a key block-level context rule that searches the associated B-%-ID application using ID as a parameter.
 - You will be directed to the Query Results page.
 - Follow navigation directions on page xxxxx of this document for further options.
- Select “Tools” in upper right for other options to access Xtender



- **Retrieve Documents or Alt + R** queries based on the Banner form being used and location of mouse within that form
- **Add Documents** - opens to window that allows you to access Xtender to add documents.

Frequently Asked Questions

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

HSC Lubbock - IT Solution Center

- Online: <https://www.ttuhsc.edu/it/is/itsolutioncenter/>
- Abilene: (325) 696-0550 ITSolutions@ttuhsc.edu
- Amarillo: (806) 414-9550 ITSolutions@ttuhsc.edu
- Lubbock: (806) 743-1234 ITSolutions@ttuhsc.edu
- Permian Basin: (432) 703-5500 RegionalITSolutions@ttuhsc.edu

HSC El Paso - IT Solution Center

- El Paso: (915) 545-6800 elp.helpdesk@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

Viewing Xtender Access

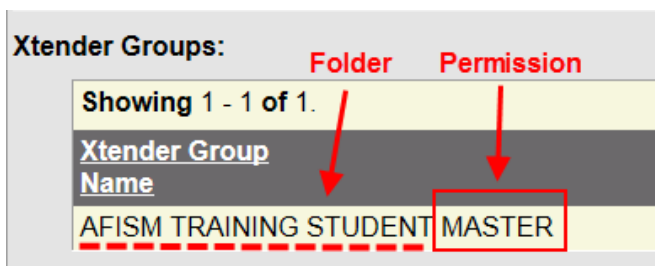
Access within the Xtender application is granted by folder/application level. Each folder is managed by one user who requests/grants access. To view your level of access within each folder(s)/application(s), follow these steps:

1. Login to TeamApp:
 - Raiderlink>A&F Work Tools Tab>AFISM Portlet>TeamApp
2. Click **View My Banner Access** in the left sidebar menu.
3. Enter ERAider ID in field provided, select Xtender Groups



The screenshot shows a form with a text input field labeled "eRaiderID:" and a dropdown menu labeled "Xtender Groups". A red arrow points to the input field, and a red box highlights the dropdown menu.

4. The folders you have access to are shown, followed by your access level



The screenshot shows a table titled "Xtender Groups:" with columns for "Folder" and "Permission". The table contains one row with the folder name "AFISM TRAINING STUDENT" and the permission level "MASTER". Red arrows point to the "Folder" and "Permission" headers, and a red box highlights the "MASTER" permission level.

Xtender Group Name	Folder	Permission
AFISM TRAINING STUDENT		MASTER

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

How do I get access to the folder(s) that I need?

TTU Only - 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 below:

The screenshot shows the Jira 'Create Issue' form for the project 'RD - Xtender (XT)'. The form is filled out with the following information:

- Project:** RD - Xtender (XT)
- Issue Type:** Request
- Summary:** Access Request
- 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:** (empty)
- Component/s:** Permissions/Security Request
- Resolution:** Fixed

The 'Create' button is highlighted with a red arrow.