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OVERVIEW

Xtender is used by Texas Tech University and Texas Tech University Health Sciences Center to scan in paper documents for easy accessibility. Documents scanned within Xtender are to be used for University purposes only.

This handout is intended for general users who need assistance in navigating and viewing documents within the Xtender system.

Security is set up for each individual user. Users are given access to only those folders, also known as applications, which are needed for their job responsibilities. For example: A user within a department could require access to both the Student System and Human Resources records. Prior to gaining any access, the user must comply with the specific guidelines needed for each system.

Xtender training is not required prior to gaining access. FERPA training must be completed prior to gaining access to any Student Records folders. Refer to How to Gain Access to Xtender below to request access.

This training guide is universal and works for all Modules, whether it's Student Records, Human Resources, Finance, or other miscellaneous folders within Xtender.

HOW TO GAIN ACCESS

Student Records:
All users must complete the FERPA prior to gaining access to Xtender Student.
  • Xtender Student access is granted after the completion of the Banner Student Banner Basics training.

Finance Records/Human Resource Records:
Requests for access should be submitted to EAS through a JIRA request.
  • The owner of the folder/application will submit approval to EAS.

Human Resource Records:
Requests for access should be submitted to EAS through a JIRA request.
  • The owner of the folder/application will submit approval to EAS.

Miscellaneous Academic Departments Records:
Academic Departments across campus are utilizing Xtender in scanning their department’s documents into their own departmental folders. Access into the department’s folders require you to get the appropriate permission to be granted access into those departments’ folder(s).
  • Requests for access should be submitted to EAS through a JIRA request.
    • The owner of the folder/application will submit approval to EAS.

**Refer to this handout for instructions on how to submit a JIRA request (page 17).
KEY TERMS FOR XTENDER

Document Management System – A centralized storage repository that includes tools for reliably creating, managing, searching, and securing documents over long periods of time.

Application / Folder – Index-driven data storage structure where documents can be stored and retrieved.

Index – An index contains a group of fields where descriptive information pertaining to documents can be stored. This group of field definitions is used to store the information within an application.

Document – A page or group of pages stored in an application and identified by index information. To create a new document, users add an object to the application and attach index information to it.

Page – An image, digital file, or other object that represents the content of a document.

Batch – A group of electronic files for one or more documents, each of which has one or more pages.

Annotation – A note or shape added to a document or batch page, typically to focus attention on a particular part of the page. They types of annotation available include, text, highlighting, lines, arrows, shapes and rubber stamps.

HOW TO GET STARTED

Log into Xtender:

- URL: http://imaging.texastech.edu
  - Login with your current eRaider username and password
  - OR
- Raiderlink>A&F Work Tools Tab>Finance Portal>Xtender (Document Management)

Once logged in, all authorized folders (also known as applications) should be listed.

XTENDER HOME PAGE

Below is an example of authorized folders (ex. Student) that could be displayed, depending on user’s security access:

RETRIEVE A RECORD IN A FOLDER

Highlight and Double Click on the Folder, this will take you to the Query Criteria screen to start a search.
TO SEARCH FOR A PERSON'S RECORDS

On the Query Criteria Screen, select New Query (if not already selected).

- Enter in the Criteria to be searched in the Search Value fields (Name, ID#, Birth Date, etc.)
- Click the Submit button or hit Enter.
- The asterisk (*) is used as wildcard to help your search.

HOW TO USE THE SEARCH RESULTS RETURNED FROM THE QUERY

All documents tied to the search criteria entered will be displayed from the query. Multiple names could be displayed if the search criteria were too broad and general (if needed, narrow the search).

- The Headers when clicked on can sort ascending or descending.
HOW DO I START A NEW SEARCH FROM THE QUERY RESULTS PAGE?

What happens if I need to start a new search after I retrieve my Query Results?

To Start a **NEW** Query:

- Click on the **New Query** Icon.
- Repeat search steps as needed.

To **NARROW Down** the Search on the current Query:

- Click on the **Modify Query** hyperlink to the far right of page (scroll over if needed).
- Enter in additional criteria in search value fields.
- Repeat search step as needed.

HOW TO VIEW A SPECIFIC DOCUMENT

**Highlight & Double Click** on the document to view:
Below is a display of an example document:

- Click the Query Results icon to go back to see all the documents if needed.

Tip: When the 📚 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.

**HOW TO EMAIL A DOCUMENT FROM XTENDER**

You can email up to 10 Megabytes of images from Xtender, this is based on the email restrictions for the university. This means larger documents, generally 15-20 pages plus will not go through and you could receive an error message.

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 should then receive an email notification with an Email Registration Code:

![Email Registration Code Image]

Copy and Paste, or manually type in the Email Registration Code in the Confirmation Code field, and then click OK:

![Confirmation Code Image]

TO EMAIL A SINGLE DOCUMENT

Xtender offers the ability to send single or multiple documents. Below are the steps to send a single document:

**Double Click and Open** the Document:
- Go to the Document drop-down menu
- Select Mail Document
- All records must be kept secure and used for university purposes only!
Enter in the Person's e-mail that will receive the emailed document(s), and then click Send.

- The recipient will receive multi-page TIF file(s) that are viewable in Microsoft Picture, Windows Photo Viewer, Fax Viewer, or any other imaging software.

For a few moments the status shows the e-mail is being processed, and then it will change once it has successfully sent.

\[\text{Note: When emailing there is an option regarding annotations and hyperlinks that could have been added to the document in Xtender. Look for the option to Hide Annotations.}\]
TO E-MAIL MULTIPLE DOCUMENTS

Xtender offers the ability to send single or multiple documents. Below are the steps to send a multiple documents:

On the Query Results screen, check the boxes next to the documents to be e-mailed:

Click on the **Email Selected Documents** icon in the toolbar:

Enter in the “**To**” field the **person’s email** that you would like to send the documents to and then click **SEND**.

- The recipient will receive multi-page TIF file(s) that are viewable in Microsoft Picture, Windows Photo Viewer, Fax Viewer, or any other imaging software.
- For a few moments the status shows the e-mail is **being processed**, and then it will change once the e-mail was **successfully** sent.

**Note:** If pop-blockers are turned on, you will need to hold down the <CTRL> key on your keyboard, or on the pop-up window, select Temporarily Allow Pop-ups, or Always Allow Pop-ups from this Site.
## HOW TO NAVIGATE ON A DOCUMENT

<table>
<thead>
<tr>
<th>Function</th>
<th>Navigation</th>
<th>Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>To <strong>View Additional Pages</strong> of a document</td>
<td>Click Next Page icon to view the additional pages of the document</td>
<td><img src="image1.jpg" alt="Next Page Icon" /></td>
</tr>
</tbody>
</table>
| To **Zoom In** (or Zoom Out) on the document | Click on the Zoom In icon, this will enlarge the document making it easier to read. 
*Note:* Click on the Hand to move the document in the viewing pane, or click on the scroll bar on the bottom and side. | ![Zoom In Icon](image2.jpg) |
| To **Rotate** the document            | Click on Rotate Right (or Rotate Left) Icon  
This will rotate the document to make it easier to read.                                           | ![Rotate Right Icon](image3.jpg) |
| To View the **Next Document**        | Click on the Next Document (or Previous Document) Icon  
This will take you through the other documents on the person’s record returned in the query.     | ![Next Document Icon](image4.jpg) |
| To View the **Query Results** page    | Click on Query Results icon  
This will take you back to the screen that displays all the documents under the person’s record. | ![Query Results Icon](image5.jpg) |
| To Run a **New Query**               | Click on the New Query Icon  
Enter new query criteria                                                                                 | ![New Query Icon](image6.jpg) |
# XTENDER NAVIGATION ICONS

<table>
<thead>
<tr>
<th>ICON</th>
<th>FUNCTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Logout Icon]</td>
<td>Logout</td>
<td>This function will Close and Logout of Xtender.</td>
</tr>
<tr>
<td>![Application List Icon]</td>
<td>Application List</td>
<td>This function will take you back to the Home Page.</td>
</tr>
<tr>
<td>![Query Results Icon]</td>
<td>Query Results</td>
<td>This function will display all the results of the query you searched.</td>
</tr>
<tr>
<td>![New Query Icon]</td>
<td>New Query</td>
<td>This function will take you to the Query Criteria form so you can do a new query search.</td>
</tr>
</tbody>
</table>
| ![Previous Document Icon] | Previous Document Next Document | This function will take you to the Next DOCUMENT on the person’s record.  
*Example:* The person has multiple documents under their name; this function will move you from Document to Document, NOT page to page within the document. Refer to Next Page and Previous Page on moving from page to page within the document under the Document Icons legend. |
| ![Toggle Document Thumbnail View Icon] | Toggle Document Thumbnail View | This function will display a thumbnail view of the documents. Click on icon to view Thumbnail view, and then click on icon to return to Full Page view.  
*Note:* This Thumbnail requires installation of the Microsoft Silverlight plug-in. Contact your IT support within your department or IT Help Desk. |
## XTENDER DOCUMENT ICONS

<table>
<thead>
<tr>
<th>ICON</th>
<th>FUNCTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Fit to Page</td>
<td>Fit Height</td>
<td>Fit Width](image)</td>
</tr>
<tr>
<td>![Rotate Left</td>
<td>Rotate Right](image)</td>
<td>Allows you to rotate the document making it easier to view</td>
</tr>
<tr>
<td>![Zoom In</td>
<td>Zoom Out](image)</td>
<td>Zooms In will make the document larger and easier to read and allows to Zoom Out</td>
</tr>
<tr>
<td>![Next Page</td>
<td>Previous Page](image)</td>
<td>Click on Next Page to look at all pages affiliated within a single document</td>
</tr>
</tbody>
</table>
| ![Print Current Page | Print Document/PDF Print](image) | **Print Current Page**: Allows you to print a single page.  
**Print Document/PDF Print**: Allows you to print multiple pages within the document |
| ![Magnifier](image) | Allows you to magnify your view from 50 up to 400.  
To close the window, click on the “x” on the Magnifier pop-up window |
HOW TO INSTALL XTENDER (IF APPLICABLE)

Xtender is an Internet Explorer (IE) based program. When using in other browsers, functionality is limited to viewing only and software installation is not required (It is not recommended to use other browsers).

For Internet Explorer (IE) browser:

- If this is your first time using Xtender, or Xtender has been updated recently, you may be prompted to install new software.
- For assistance on installation of software, contact your IT support person or IT Help Desk.

Internet Explorer (IE) software installation instructions:

Disclaimer: The instructions below work for Internet Explorer (IE) and may look slightly different depending on the version you are using. If you have questions about installing the software, please contact your IT support person or IT Help Desk.

When you first click on Xtender it may ask you to install it. You may receive the prompt below:

Right Click on notification and click Install This Add-on for all Users on This Computer:

Click Install:

Note: If your computer has pop-up blockers on, you may need to hold down the <CTRL> key while the software is installing.
COMPATIBILITY VIEW ISSUES (WILL ONLY NEED TO COMPLETE IF HAVE ISSUES)

If you installed Internet Explorer 11 also known as 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 the click **Add**.
  - Type in *ttu.edu* and then 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 (FAQS)

**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) 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
HOW TO VIEW YOUR FOLDER(S)/APPLICATION(S) ACCESS LEVEL(S)

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 \textbf{View My Banner Access} in the left sidebar menu.
3. Click on \textbf{Xtender Groups}. This will display the folder(s) that you have access to, followed by your access level (the number of folder(s)/application(s) is listed at the top):

   \begin{table}[h]
   \centering
   \begin{tabular}{|l|}
   \hline
   Xtender Group Name \tab \textbf{Displays the} \tab \textbf{Number of} \tab \textbf{folders} \\
   \hline
   ACCOUNTING SERVICES \tab \textbf{MASTER} \\
   ACCOUNTS PAYABLE \tab \textbf{BROWSE} \\
   AFISM TRAINING STUDENT \tab \textbf{MASTER} \\
   AR CR \tab \textbf{BROWSE} \tab \textbf{Level of access is} \tab \textbf{highlighted} \\
   BUDGET OFFICE \tab \textbf{BROWSE} \\
   FST FIXED ASSETS \tab \textbf{MASTER} \\
   FST REPORTING \tab \textbf{UPDATE} \\
   \hline
   \end{tabular}
   \end{table}

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