



Xtender User Guide

Enterprise Systems Team 02-11-2020



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Introduction

ApplicationXtender is Illinois Tech's document imaging system. ApplicationXtender, hereafter referred to as "Xtender", enables users to query, create, index, and annotate electronic documents in a variety of formats for subsequent retrieval.

- Scan documents to create new documents, add to existing documents, or batches. Scanning in Xtender requires the installation of the "Captive Cloud Toolkit" software. If needed, please ask your LAN Admin to install Captiva Cloud Toolkit
- Add/Import electronic files to Xtender as individual documents, batches, and individual pages.
- Index documents by specifying information in the application-specific index fields, Indexing enables you to organize, search, and retrieve documents efficiently.
- Retrieve documents through queries by using various search methods.
- Attach annotations or redactions to highlight important information, comment on the contents of the page, or block areas of the page from view.

Document Storage and Display

You can store any type of file in Xtender. Depending on the type, Xtender stores files as supported or unsupported file types. When you capture electronic files, Xtender first verifies the file type, and then stores the file as the identified type (such as image, text, foreign file format). The functions available are file-type dependent. Features that are available with one file type might not be available in another.

Also, supported and unsupported files types are displayed in different ways.

Definitions

For the purposes of this Policy the following definitions apply:

- "Capture" means the creation of an Image from a Document.
- "Document" means an original paper or film Record.
- "Document Imaging Program" means an authorized program following strict control guidelines and established procedures to ensure the accuracy, reliability and trustworthiness of resulting Images.
- "Image" means an electronic reproduction of a Document.
- "Indexing" means adding contextual information to an Image to enable the retrieval of the Image and document its origin.
- "Official Copy" means the copy of a University Record designated in Local Procedures to satisfy the University's retention requirements where multiple copies of a Record exist.
- "Quality Assurance" means a process which takes place after Indexing to verify the accuracy and completeness of a sample of Images and their indexing.
- "Quality Control" means the procedural steps in place to provide confidence that the Image yields the same data as the Source Document.
- "Record Authority" means the position designated in the RCRS as having authority over a particular Record Series.
- "Record" means any record of information however recorded, whether by electronic means, in print form, on film or otherwise.
- "Source Document" means any Document that has been captured.
- "University Record" means a fixed unit of information in any format that documents a transaction, decision or relationship made by the University. It has continuing value in the future to complete further work, to provide evidence, to serve as institutional memory of obligations, responsibilities, decisions and actions, or to document the unique character and history of the institution.



Supported File Types

Supported file types are defined as those file types that Xtender can display within the Xtender window. The following file types are supported:

1. Text files (TXT), COLD, and ERM

COLD data is the report data that is generated from existing applications, which are indexed by using an extraction process, and downloaded into Xtender applications. After the import, the files are stored in the compressed text file format that is proprietary to Xtender. Form overlays that are added (from Xtender Reports Management) to these documents enable you to view the report data in the context of a standard form. You cannot add form overlays to PDF documents from Xtender Reports Management. The Render Server renders COLD and ERM documents with form overlays.

Note: Usually, text files display as text files; otherwise, they display as foreign files. ASCII, EBCDIC, and EBCDIK are the supported text formats.

2. Image files (JPEG, GIF, TIFF, Windows Bitmap, PCX, DCX, and TGA)

Image files are stored in common formats such as TIFF, JPEG, GIF, and Bitmap. The Render Server renders all other image formats, including TIFF, into one of these formats to enable proper display of image files in different platforms and browsers.

By default, Xtender stores images in their native format (for example, a TIFF file is stored as a TIFF file). It can also store image files in a different format if Xtender supports that format. When you store an image file in a specific image format, Xtender ignores the original format and stores all images in the selected format.

Note: Progressive JPEG files are not supported. These files are imported as foreign files.

3. Adobe Portable Document Format (PDF) files

The Render Server renders PDF files as images. You can add annotations to a PDF file and also perform functions such as printing, exporting, and emailing. If the software cannot extract text from a PDF file, the pages are processed for text content by using OCR. If you have access to the Index Agent for full-text indexing, you can submit PDF files for full-text indexing.

Note: Non-image PDF and non-text PDF files will not be OCRed by the index agent.

4. Rich Text Format (RTF) files, Hypertext Markup Language (HTML) files, and Extensible Markup Language (XML) files

Xtender stores RTF, HTML, and XML files as foreign files. A web page is typically in HTML format. If you have access to the Index Agent for full-text indexing, you can submit RTF and HTML files for full-text indexing.

Unsupported-Foreign File Types

Unsupported file types may be imported into Xtender, but cannot be displayed in the Xtender Viewer. Examples of



foreign files types include but are not limited to Excel spreadsheet files, MS-Word documents, and PowerPoint files.



When you hover over a foreign file in the query results screen, the document thumbnail will reveal the document is foreign. Below is what displays.

Here are two options to view a foreign file that is stored in Xtender. Both options are acceptable if the intent is to view the document content.



1. **Download the foreign file.** This option displays the foreign file within the application associated with the file type. For example, a file with a “.xls” file extension will display in Microsoft Excel; files with a “.docx” extension will display in Microsoft Word and so on.
2. **Render the foreign file.** This option will display the contents within your web browser window.

Accessing Xtender

There is one (1) way to access Xtender:

1. You can access Xtender from the Banner Admin Pages.



Not all Banner Admin users have access to Xtender. You must request access to use Xtender by submitting a request to supportdesk@iit.edu.

Banner – Xtender Access Items of Note:

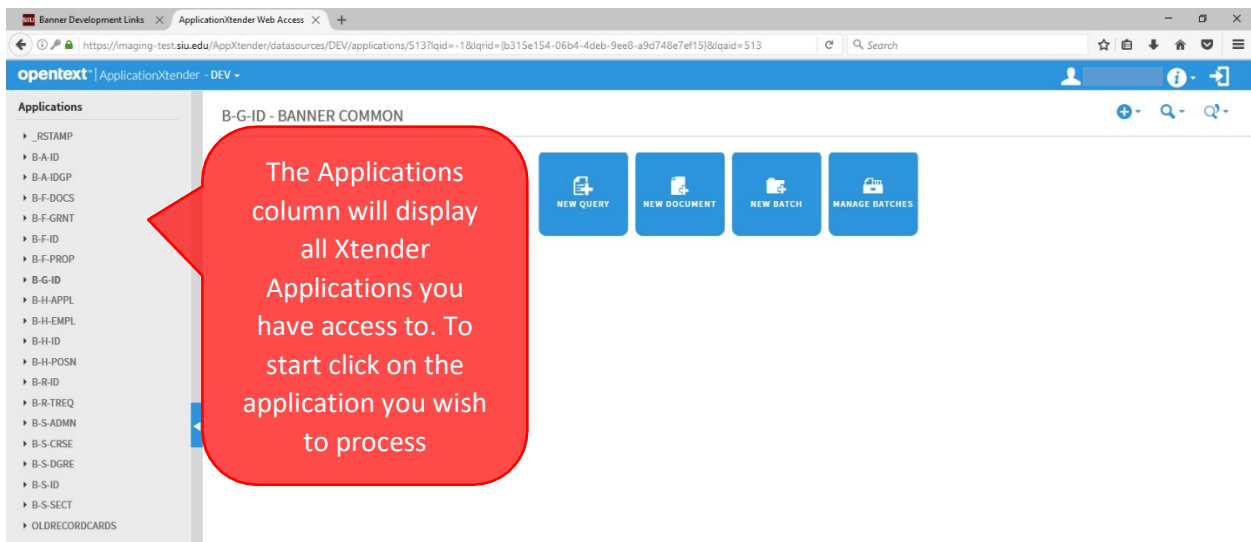
Xtender access from an Admin Page enables you to view or index Xtender documents that share related key information such as Campus Wide ID (CWID). But, note the following when navigating within the Banner system and attempting to access Xtender documents:

1. Not all Admin Pages pages are configured for Xtender access. If you don’t see the Banner Document Management heading under the Tools menu, which indicates the Banner form is not linked to Xtender.



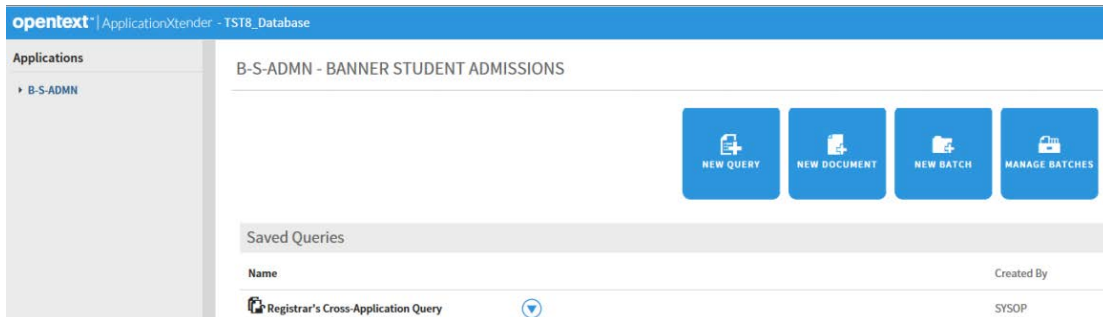
2. The Xtender document/page that will launch from an Admin Page form depends on where your cursor is placed on the page.
3. Some Xtender content is filtered or restricted based on content. When viewing or indexing documents in Xtender, be aware that Xtender security may determine what documents you can view based on **document level security**. Some Xtender applications restrict what document types can be viewed or indexed. If you attempt to view a document from Banner and don't have the necessary document security, no documents will display.

Xtender Welcome Page



Xtender Home Page

To begin Xtender navigation to a specific application, click on the application name on the left side of the Xtender Welcome page. Clicking on any Xtender application will take you to the Xtender Home page, where you can run queries, create new documents, or create/manage batches:





Creating/Running Queries



Xtender Query Overview

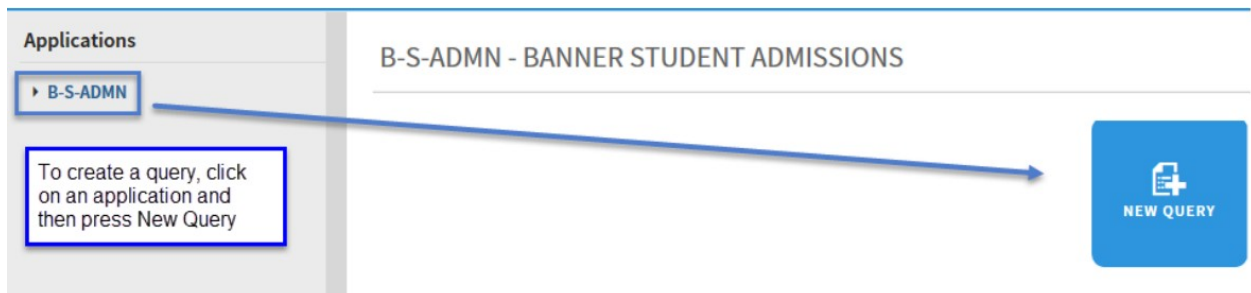
Xtender provides a variety of document search and retrieval methods. Documents can be searched by index, wildcard, a list of values, and a combination search. You can search either one application or across multiple applications simultaneously. The Xtender query tool enables you to create a new query, edit an existing query, or run an already created query. Once a query is created, it can be saved for later use. Saved queries appear under the associated application.

After you retrieve a document from a query, you can view, print, annotate, add and delete pages or documents, and modify index and document properties.

The “New Query” option will produce an option to query Xtender for the selected application and show query fields that are unique to each application.

Creating and Running a New Xtender Query

1. Select the required application from the list of applications on the left side of the page and click **New Query** to open the **New Search** page.



2. In the **New Search** page, specify the search criteria by using the index fields. Queries can be created by entering one or more values in any of the index fields. The more index values you enter for a query, the narrower the search and number of documents will be returned.



New Search - B-S-ADMN

Search Criteria

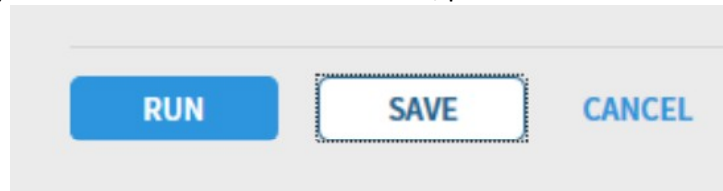
Enter a search term in the index fields to filter your results.

ID

PIDM

DOCUMENT TYPE

3. After all Query Selection Criteria has been entered, perform one of the following actions:



- Click **RUN** to run the query without saving it for future use.
- Click **SAVE** to be able to run the query at any time. If the query is being saved, give the query a name and optionally check the “Available to all users” checkbox if you want to share the query with other users. If you do not check that checkbox, your query is considered a private query that only you and users with the Administrator privilege can access.

Save Search

Name*

Available to all users

SAVE **CANCEL**

Methods of entering Query Search Criteria Values



Xtender offers a sophisticated range of options for selecting search criteria. The search criteria can be as simple as one field value (like a Student ID,) or a complex combination of multiple values. This section describes the different methods of entering your search criteria.

1. **Single value search criteria.** Query search criteria can be as simple as a single value entered in a search field. In the ID field, for example, you could enter a specific student’s CWID to see all documents in an application for a specific student.

New Search - B-S-ADMN

Search Criteria

Enter a search term in the index fields to filter your results.

ID

Xtender Search Criteria Tip: Wildcard character in search fields

In the **New Search** page, index search criteria can be specified by using the asterisk (wildcard) character in at least one field. For example, specify 2018* to search for documents with a term code that begins with the characters “2018.”

2. **Multiple select/Input and enter Search Criteria** – for search fields that are tied to a predefined list of values (like Document Type,) you can enter values by clicking in the field and entering one or more values.

DOCUMENT TYPE

In the example below, clicking in the Document Type field produced a list of values to select from. This search criteria entry method lets you select one or more values from a list.

DOCUMENT TYPE	<input type="text"/>
LAST NAME	
FIRST NAME	
SSN	
BIRTH DATE	

[Null]

AD - CONVERSION

AD - FSH APP PACKET

AD - FSH MISC.

AD - TEST SCORES

Once you have finished selecting the multiple select values, the search criteria for that field will show the selected list of values as in the example below.



New Search - B-S-ADMN

Search Criteria
Enter a search term in the index fields to filter your results.

To enter multiple values, select a value from the list presented, then click in the search criteria white space to select the next value

ID

PIDM

DOCUMENT TYPE

- Search Range Search Criteria** – to search based on a range of values, select the Search Range icon. That range would be entered as follows when clicking on the Search Range icon next to the term code field:

TERM CODE → Search Range

After clicking on the Search Range icon, you will be prompted to enter your beginning and ending values. Note that your “Type of Comparison” can use a number of relational operators, as shown below:

Range Search

Type of Comparison:

Value:

And:

Greater Than
Greater Than or Equal
Less Than
Less Than or Equal
Not Equal To

In the example below, the query will search for all documents in B-S-ID with a term code between 201760 and 201840.

Range Search [X]

Type of Comparison:

Value:

And:

CANCEL OK

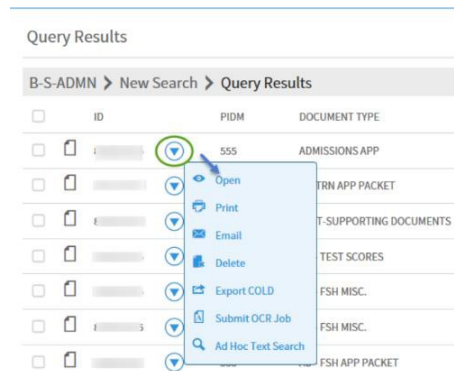
- Search List Search Criteria**- this search criteria allows you to enter multiple select values for a query. As an example, if you wanted to query on 2 or more CWIDs, you would click on the List search icon and one-by-one, enter the CWIDs for your query.



You can add and remove fields in your search by clicking the corresponding buttons in the **List Search** screen.

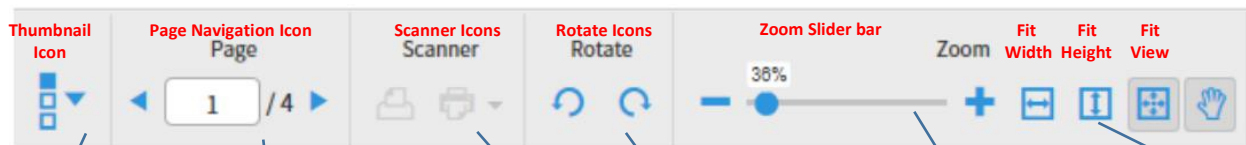
Query Results Window

When you submit a query, one or more rows of query results will display in the Xtender Query Results Window as shown in the example below. To open, print, email, delete, etc. a document, click on the down-arrow as shown and select the action from the menu.



Navigating Documents/Pages

Xtender Document – Page Toolbar



This allows you to turn thumbnail display on or off. When the arrow next to the icon is pointed down, thumbnails are displayed. Clicking on the icon changes the mode to hide thumbnails and arrow will point right.

This displays the current page number of a document and provides you a method of advancing between pages. To navigate pages, simply click the right or left arrows of the navigation window

If you have either a local or network scanner attached to your computer, the two scanner symbols will display in the scanner section of toolbar. The icon on the right called the "Select Scanner" icon allows you to specify standard scanner attributes. Pages should be scanned black and white (if possible)

Rotate enable you to rotate a page either clockwise or counter-clockwise. The Rotate Icons will not display if the document is a foreign file. You can click the page heading above the toolbar and select the Rotate and Save option to save the page in the current rotated format.

This provides easy method of zooming in and out on a page.

These allow you to resize the current page to maximize the viewing content either by width, height or overall size. The best icon to use depends on the original size of the page when it was imported or scanned.



All documents – supported and unsupported – display with the standard document/page toolbar shown above. Supported file types will also display with an Annotation toolbar.

Document Thumbnails

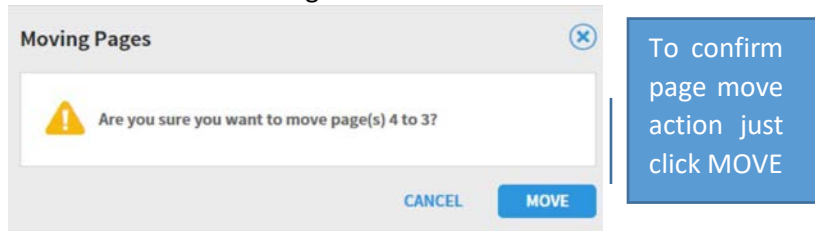
Documents with two or more pages will open display with the Thumbnail window. The thumbnail view is helpful to see a page at a glance for navigation purposes. In addition, the thumbnails also provide a means of reordering pages by clicking and dragging a page to the order of the document you choose.

Thumbnail Actions – Change Page Order

Pages can be reordered with a multi-page document one of two ways:

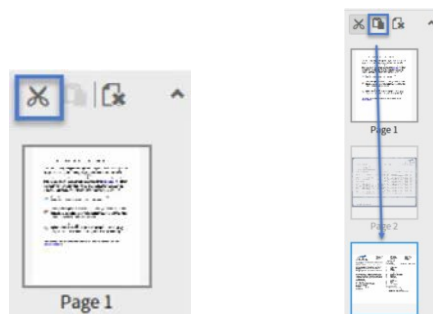
1. **Using a click-and-drag method.**

To move a page using the thumbnail display, click on the page you want to move and drag it up or down in the thumbnail window. Doing so will result in a confirmation window.

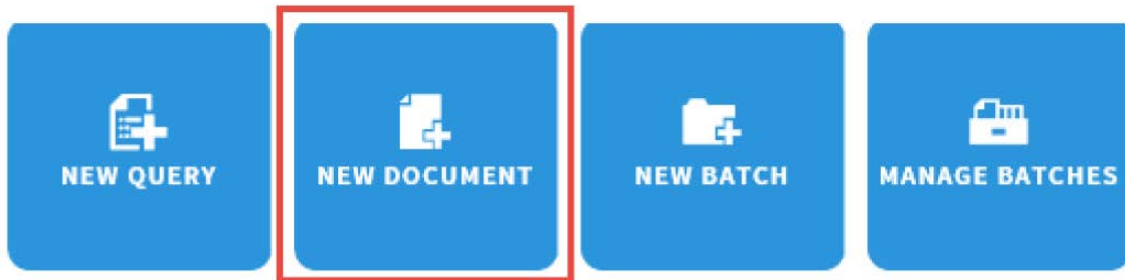


2. **Cut and Paste method.**

To move a page within the document using the Cut and Paste method, begin by clicking the Cut icon. To paste the cut page, you must then click on the page you wish to paste the cut page after. As with the click and drag method you will be prompted to confirm the page move/paste action.



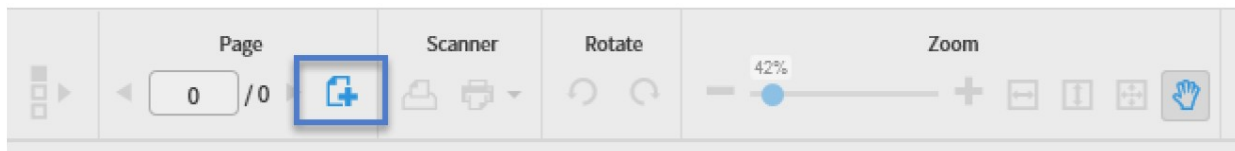
Creating a New Document



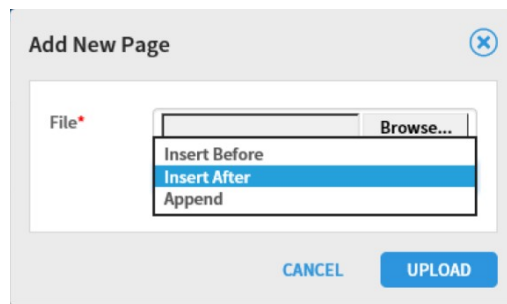
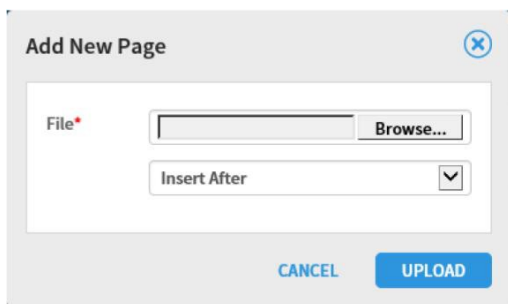
New documents can be created in Xtender by using the New Document tab or by creating a batch, as described later. To create/index a document using the New Document option, there are two methods:

1. Import a document from your local files system.
2. Scan a document from either a local or network scanner.

Importing a Local File New Document – Toolbar Method



Xtender enables you to import electronic documents from your local file system by clicking on the Add Page icon on the toolbar. This will open the Add New Page screen.

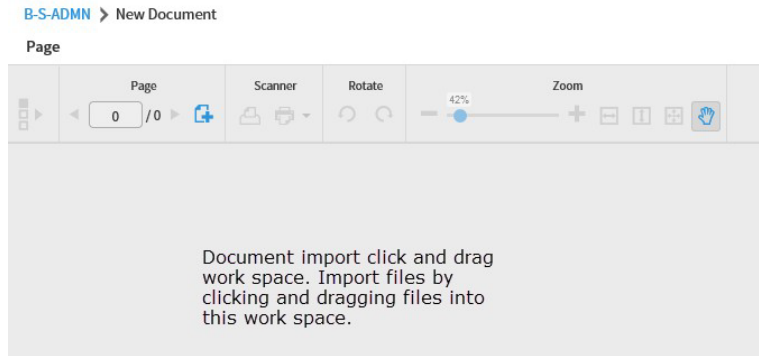


There are 3 options for placement of the page(s) you are importing. The first page placement doesn't matter but, after adding more pages, you can then insert or append new pages before or after the previous pages.



Importing a Local File New Document – Click and Drag Method

The second method of importing a local file document uses a Windows click and drag technique. Once the New Document workspace is open you can simply click on the file you want to import from your system and drag it into the New Document workspace. The document will then show the same as if you imported it from the toolbar. You still get the 3 page positional options of Insert Before, Insert After or Append.

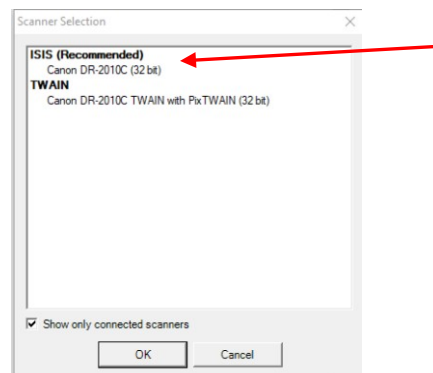
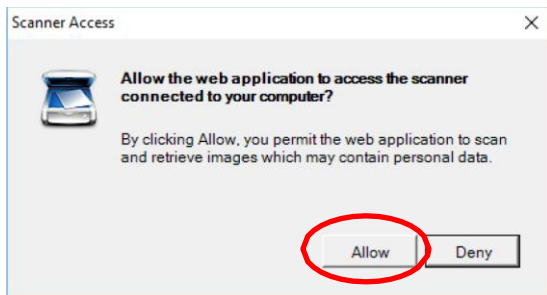


Creating New Documents with a Scanner

The second technique of creating new documents in Xtender is the scanning method. If you have a local or network scanner available to your computer, Xtender 16.3 first requires the installation of supporting software called “Captiva Cloud Toolkit.” Please submit a ticket to Desktop Support to have this software installed if you have not already done so.

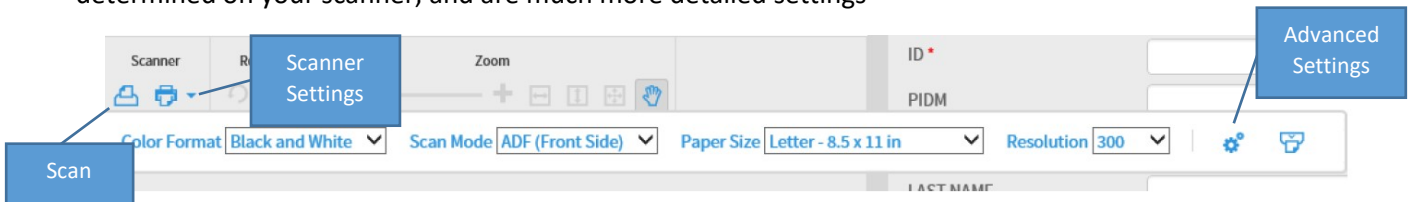
Setting Up Your Scanner

Once you have Captiva Cloud Toolkit installed, click on the highlighted scanner icon in the toolbar (the scanner icon with the drop-down arrow.) This action will prompt you to allow use of your scanner with Xtender. When prompted, click “Allow.” Once you have allowed scanner access, you may then be prompted to select the scanner driver software you elect to use. If you have the option, always select ISIS drivers – they work most efficiently with Xtender.

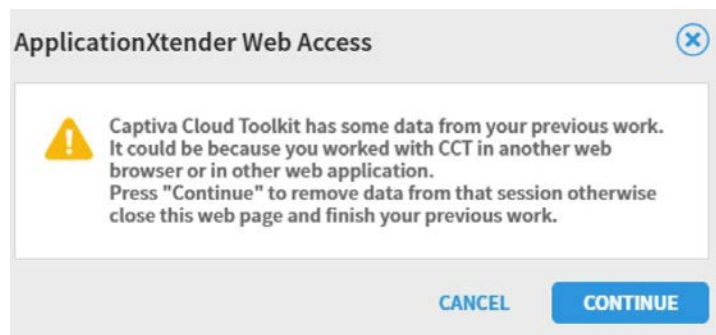




Once the scanner is enabled for Xtender, there are two scanner icons highlighted on the New Document toolbar. The scanner icon on the right enables you to configure settings for scanned documents such as the color format, resolution, etc. For more advanced settings you can click on the “Advanced Settings” gear icon on the right of the scanner toolbar. The settings available are determined on your scanner, and are much more detailed settings

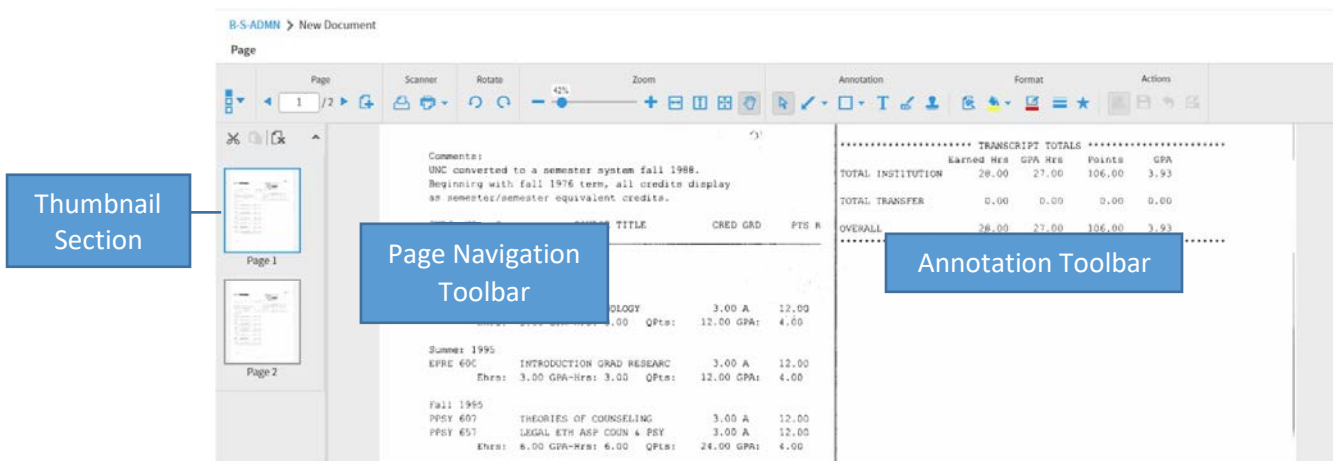


Note if you see the following message display when you attempt to use your scanner, click CONTINUE to resume scanning.



Scanning a Document

Click on the Scan icon from the toolbar. Your scanner will begin scanning operations. While the scanner is operating, you will see the following message display in a pop-up window: “There is a running scan operations. Click the “CANCEL” button if you want to stop the scan operation.” When the scanner is finished scanning, your page/document is now available for indexing. You will notice thumbnails on the right, and the page navigation and the Annotation toolbar at the top.





Indexing a Document

Whether you have created a document by importing, copying and pasting, or scanning, the indexing steps will be the same. Xtender indexing values will vary from application to application, so bear in mind that the examples shown are for one application – B-S-ADMN.

Indexing Window

The screenshot shows the 'Indexing Window' form with the following fields and annotations:

- ID***: A text input field with a red asterisk. A blue callout box labeled 'Denotes Required Field' points to the asterisk.
- PIDM**: A text input field.
- DOCUMENT TYPE***: A dropdown menu with a red asterisk. A blue callout box labeled 'Dropdown list available' points to the dropdown arrow.
- LAST NAME**: A text input field.
- FIRST NAME**: A text input field.
- SSN**: A text input field.
- BIRTH DATE**: A date picker field.
- TERM CODE**: A dropdown menu.
- APPLICATION NUMBER**: A text input field.
- ADMISSIONS REQUIREMENT**: A dropdown menu.
- INSTITUTION NUMBER**: A text input field.
- ROUTING STATUS**: A dropdown menu.
- ACTIVITY DATE***: A date field with a blue callout box labeled 'Timestamp' pointing to the date input and another blue callout box labeled 'Always Auto-filled' pointing to the field.
- VPDI_CODE**: A text input field.
- DISPOSITION DATE**: A date picker field.
- RECRUITER ID**: A text input field.

At the bottom of the form are 'CANCEL' and 'SAVE' buttons.

Indexing Navigation, Rules and Tips

When indexing a document, there are certain rules in Xtender you must follow:

1. **Primary Index Values:** In most cases the primary index for applications will be the first field – ID. When you enter the first index value and tab off of that field, Xtender will auto-fill related index values. An example would be in the B-S-ADMN application, entering the ID will auto-fill PIDM, LAST NAME, FIRST NAME, SSN and BIRTHDATE. This design ensures that values related to the primary index value are always consistently used and saves time in data entry.



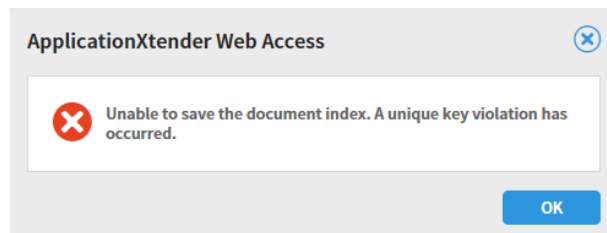
- Required Fields:** All fields marked with a red asterisk are required fields, as shown in the above Index Window screen shot. Required fields must have a value entered in order for you to save a document.
- Drop-down List Usage:** Index fields with a drop-down arrow are predefined values to ensure consistent spelling and value usage. The desired value can be entered by simply clicking one of the values in the drop-down list.
- Activity Date:** Applications with an Activity Date will show the field as required, but this is an auto-filled field that requires no entry. You will see "Timestamp" already in the field.

Once all index values have been entered for a page/document, clicking SAVE will show the documents along with its index values. The SAVE button will change to MODIFY once save is complete.

The screenshot shows the Xtender application interface. On the left is a document viewer with a toolbar containing options like Page, Scanner, Rotate, Zoom, and More. The document content includes a header with 'Record of:' and 'Date issued: 26-APR-2018', followed by a table of course data. On the right is a form with fields for ID, PIDM, DOCUMENT TYPE, LAST NAME, FIRST NAME, SSN, BIRTH DATE, TERM CODE, APPLICATION NUMBER, ADMISSIONS REQUIREMENT, INSTITUTION NUMBER, ROUTING STATUS, ACTIVITY DATE (pre-filled with '2018-05-09 15:50:26'), VPDI CODE, DISPOSITION DATE, and RECRUITER ID. A blue callout box with the text 'Save changes to modify' points to the 'MODIFY' button at the bottom right of the form.

Unique Key Violation Message

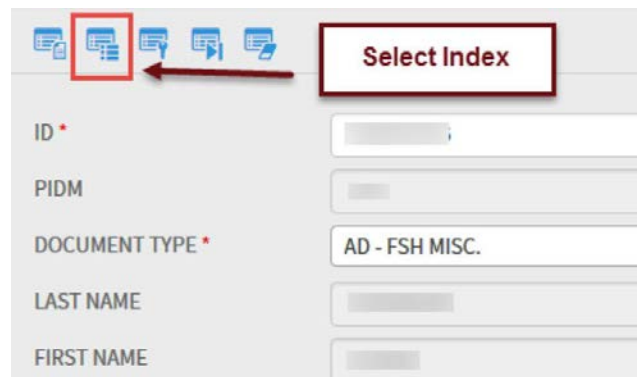
If you receive the following message when trying to save your document indexing, it indicates that a document already exists in Xtender with the same index values you entered.



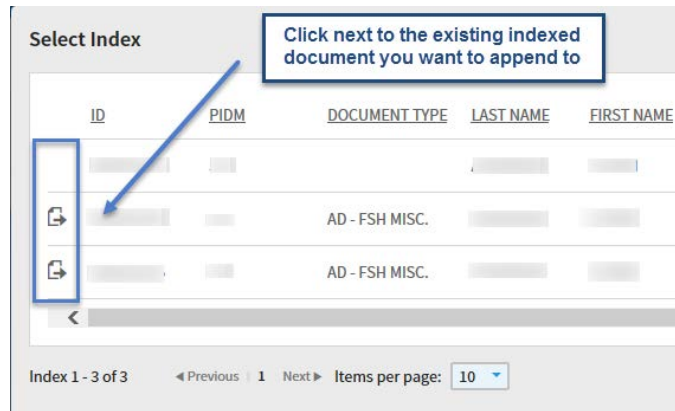
At this point, you have two choices of how to proceed:

1. You can change the index values to make the document indexes unique.
2. You can append the new document to the existing document with the same keyvalues.

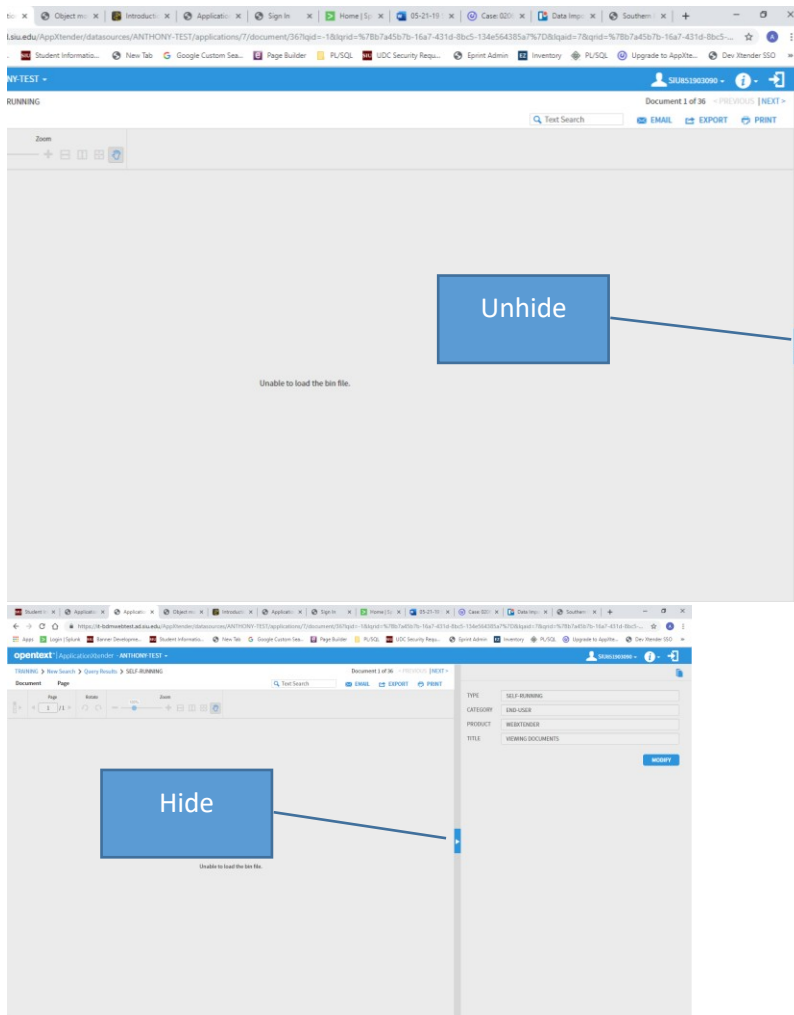
To append your new page/document to an existing document, click the OK button on the unique key error message and select the "Select Index" icon at the top of the Indexing window.



You will then be presented with one or more documents choices to append your new document to. Once you have chosen the appropriate row, click on the Attach icon and your new page(s) will be appended to the previously indexed document.



The screen shot below shows how to hide/unhide the index window:





Creating a New Batch



In addition to adding documents individually, Xtender enables you to create and index documents in batches. Batches are particularly useful when a department assigns the task of scanning multiple pages to an employee whose sole function is the scanning function. Once all pages have been gathered into a batch, the same or separate individual(s) can process the batch of pages/documents in bulk.

Creating a New Batch:

Click the New Batch icon. This action will produce the Batch setup screen. Select the desired application for your batch, give it a unique name, and click Continue. The batch description field is optional.

Upload New Batch

Application* B-S-ADMN

Name*

Description

CANCEL CONTINUE

After you click continue you will be taken to the same screen as you were for New Document. At this point, you can scan and /or import documents/pages just as you did with the New Document option.



Managing Batches



The Manage Batches option lists all batches that have been created either from a scanner or via imported pages/documents.

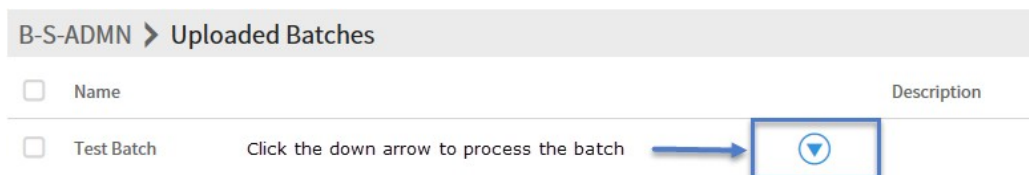
Manage Batches + - 🔍

B-S-ADMN > Uploaded Batches

<input type="checkbox"/> Name	Description	Create Time -	Created By ▾	Pages	State
<input type="checkbox"/> Test Batch		2018-05-09 16:19:44	GLENN JACKERSON	1	Idle

Batches can be managed on of two ways:

1. Click the checkbox next to a batch, which allows you to delete a batch if it is in an idle state. If you have administrative privileges, you also have the option of resetting a batch status to idle.
2. Click the down-arrow next to the batch name to open and process the batch:



Clicking the down-arrow to process a batch produces the following three options for batch processing:



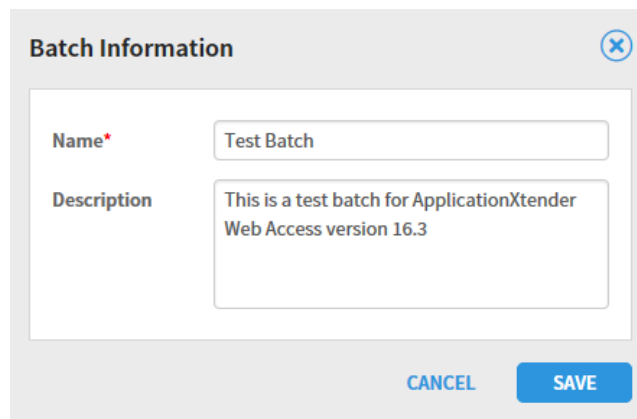


How to Index a Batch

The Batch Index Window allows you to both index a batch as well as add/modify annotations to each page/document in the batch. The toolbar for the Batch Index window looks the same as indexing a New Document. Indexing a batch is the same process as indexing a New Document.

How to Edit a Batch

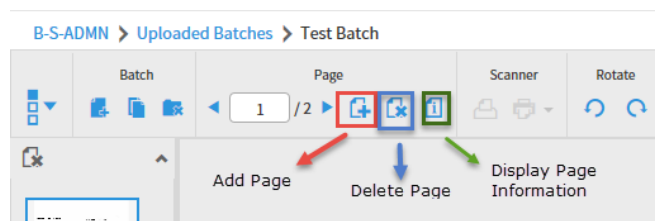
The Batch Edit option opens the Batch Information dialog box, enabling you to change the name or description of the batch. No further changes to the batch occur with this option.



How to Import a Batch

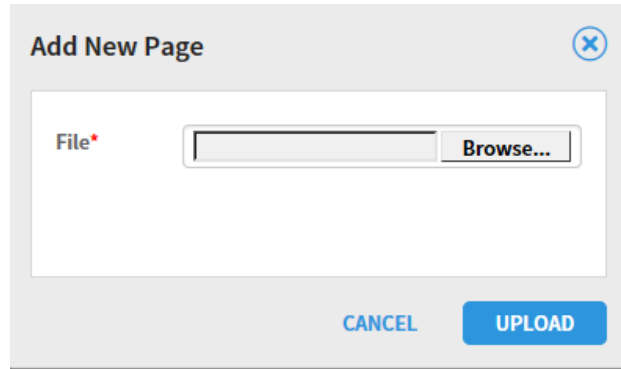
The Batch Import option allows you to add pages to batches one of three ways:

1. Click and drag a file from your local file system into the Batch window, which allows you to add that page to the existing batch.
2. Click the Add Page icon on the batch toolbar. This option lets you select a file from you file system and add it to the batch. Note that the Page portion of the Batch Processing toolbar also lets you delete a page or display page information. The page information icon will display the format of the page/document/file. The file, for example, could be a PDF file, image file (.jpg, .tiff, etc.)





If the Add Page icon is pressed, you will be presented with a screen allowing you to point to a file in your local file system you wish to import into the batch:



- 3. The third option for adding a page to a batch is the Scan option. The scanner icon on the right side in the scanner toolbar will start your scanner and append the scanned pages to the end of the existing batch.



When scanning into a batch, you will get the same scanning message you do for documents.

Xtender Keyboard Shortcuts

SHORT CUT	FUNCTION
CTRL+ALT+n	Upload New Document
CTRL+ALT+m	Upload New Batch
CTRL+ALT+b	Manage Batches
CTRL+ALT+c	Select Scanner
CTRL+ALT+S	Scan
Batches	
CTRL+ALT+t	Attach current page
CTRL+ALT+a	Attach all pages
ALT+pagedown	Next Page
ALT+pageup	Previous Page
ALT+i	Rotate left



ALT+r	Rotate right
ALT+up arrow	Zoom in
ALT+down arrow	Zoom out
ALT+S+L	Rotate and save - 90° clockwise
ALT+S+2	Rotate and save – 180° clockwise
ALT+S+3	Rotate and save – 270° clockwise