# McGill

# ApplicationXtender Desktop Client User Guide

Last Updated: November 13, 2019

# Table of Contents

# Introduction

ApplicationXtender (AX) clients include:

- **Document Manager** client is used to create, annotate, index, and retrieve documents.
- **Image Capture** client is used for bulk scanning where the users can scan paper documents to create batches that can be opened using the Document Manager client.

**Target audience**: Staff who uses Banner INB and need AX tools to view, scan, and/ or index documents.

## How to request/ access

**Request**

The Data Security Designate has to submit the webform (Request access to AX) to grant access for those who require the AX clients via RD (RemoteApp and Desktop) Web Access or installed on their computer.

**Access**

- **AX Clients**(Document Manager and Image Capture client) can be
  - Used Via RD (RemoteApp and Desktop) Web Access. For more details, see ApplicationXtender tools via RD Web Access
  - Installed on your computer

## Sign in to ApplicationXtender clients from your computer

Note: if you would like to have the AX clients install on your computer, you will need ask a Data Security Designates in your department/unit to submit the webform (Request access to AX) and provide a reason why you need AX clients to be installed on your computer.

1. Once AX clients are installed on your computer, open Document Manager.
2. Sign in with your *Banner UserID and password.

**\*Banner INB UserID and Banner Password:**for more information, go to http://kb.mcgill.ca/it/easylink/article.html?id=1001

## Sign in to ApplicationXtender tools via RD Web Access

For details on the sign-in procedure, choose the instruction set based on your computer operating system:

Windows

- RD Web Access to Banner INB and ApplicationXtender tools (for ALL users)
- Start menu for RD Web Access to Banner INB and ApplicationXtender Tools (for IT-managed computers)

Mac OS

- MS Remote Desktop setup for Banner INB and ApplicationXtender Tools

Note: once you have logged into the RD Web Access, choose one the following ApplicationXtender tools icons:

# Workstation settings

Make sure that **044-ISR AX-Accounts** (AX service accounts) are allowed to logon locally and that you are able to "Impersonate a client". This should be done by the System Administrator when AX is installed, but if you have any issues accessing the AX database, you can verify the settings as follows:
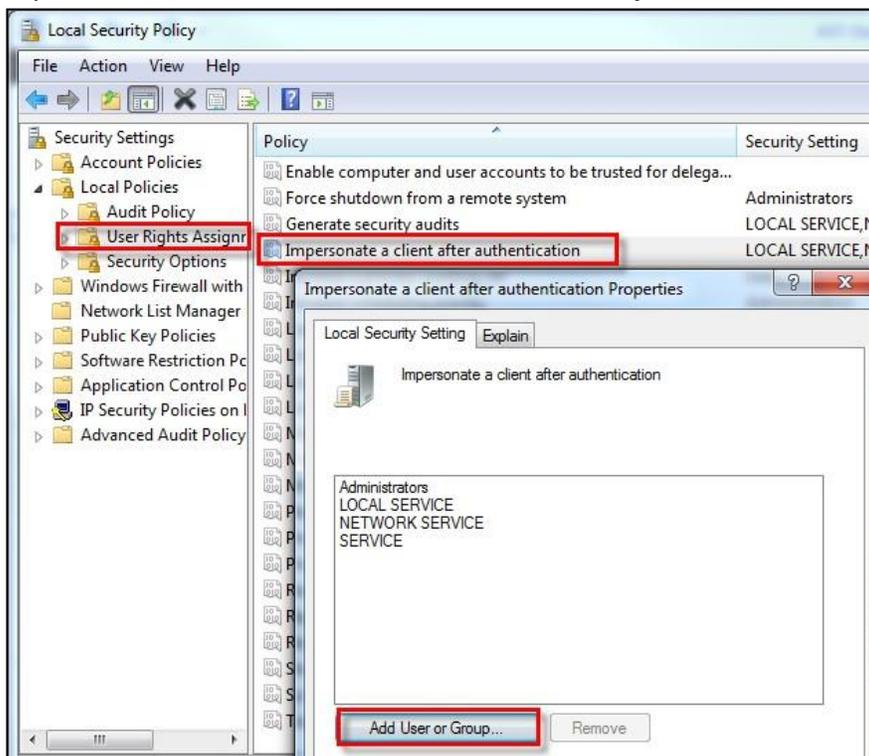
1. Go to **Start** > **Administrative Tools** > **Local Security Policy**
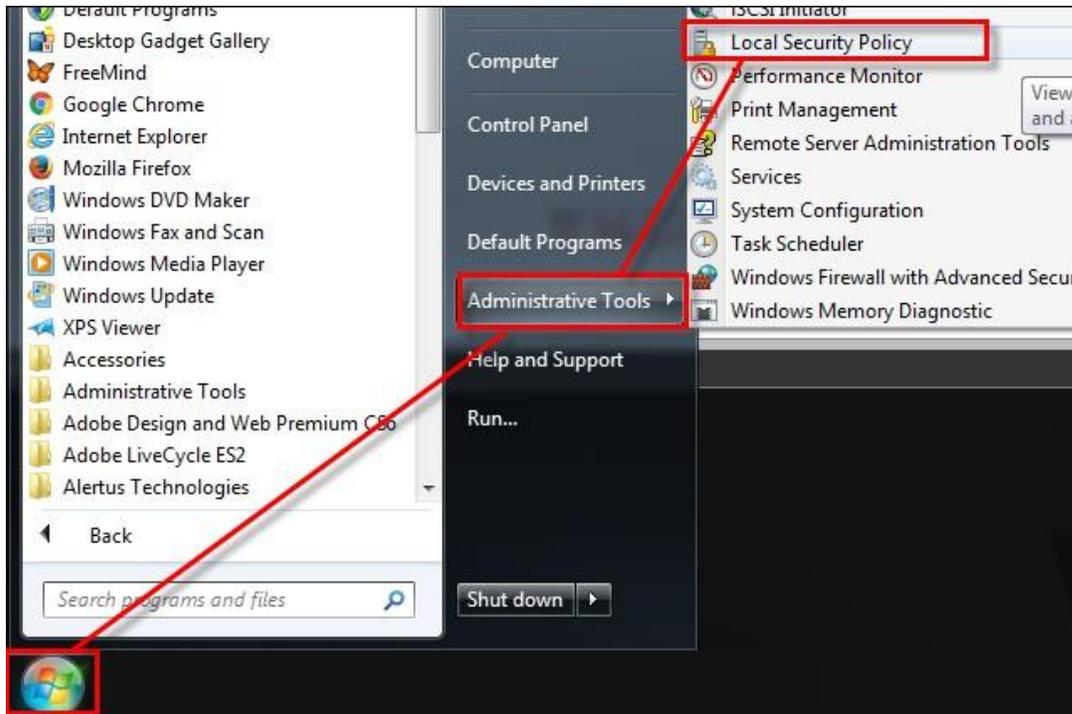
2. Go to **Local Policies** > **User Rights Assignment** > **Allow** log on locally; click **Add User** or **Group** and enter **044-ISR AX-Accounts** if it isn't there; click **OK** to add it.
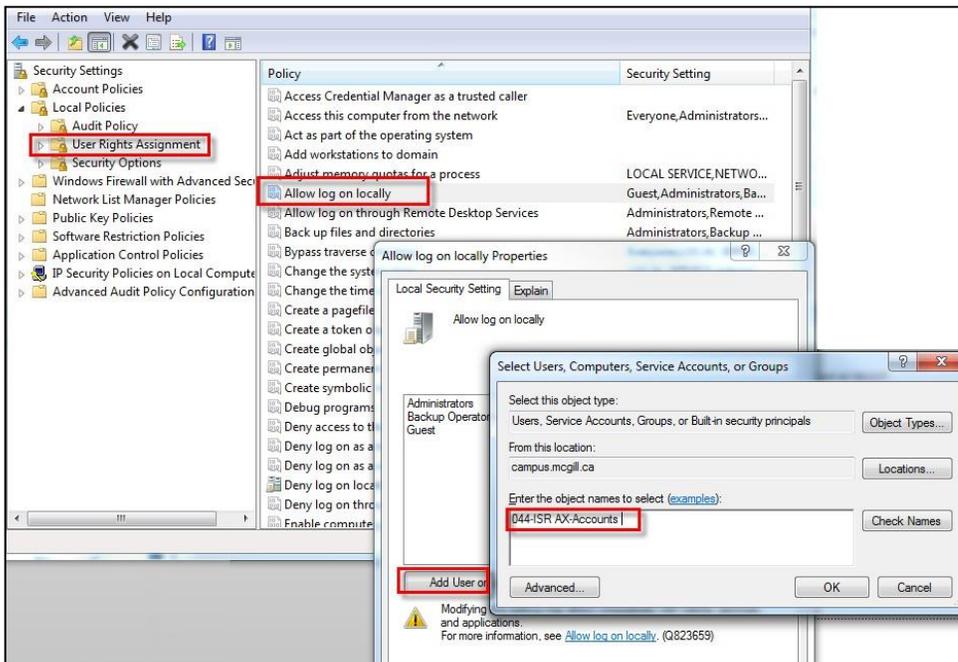


3. Go to **Local Policies** > **User Rights Assignment** > **Impersonate** a client after authentication; if your name is not listed, click **Add User** or **Group**.

4.  Enter your **McGill Username** (first.last@mcgill.ca) or an Active Directory group to which you belong in the textbox and click **OK**.
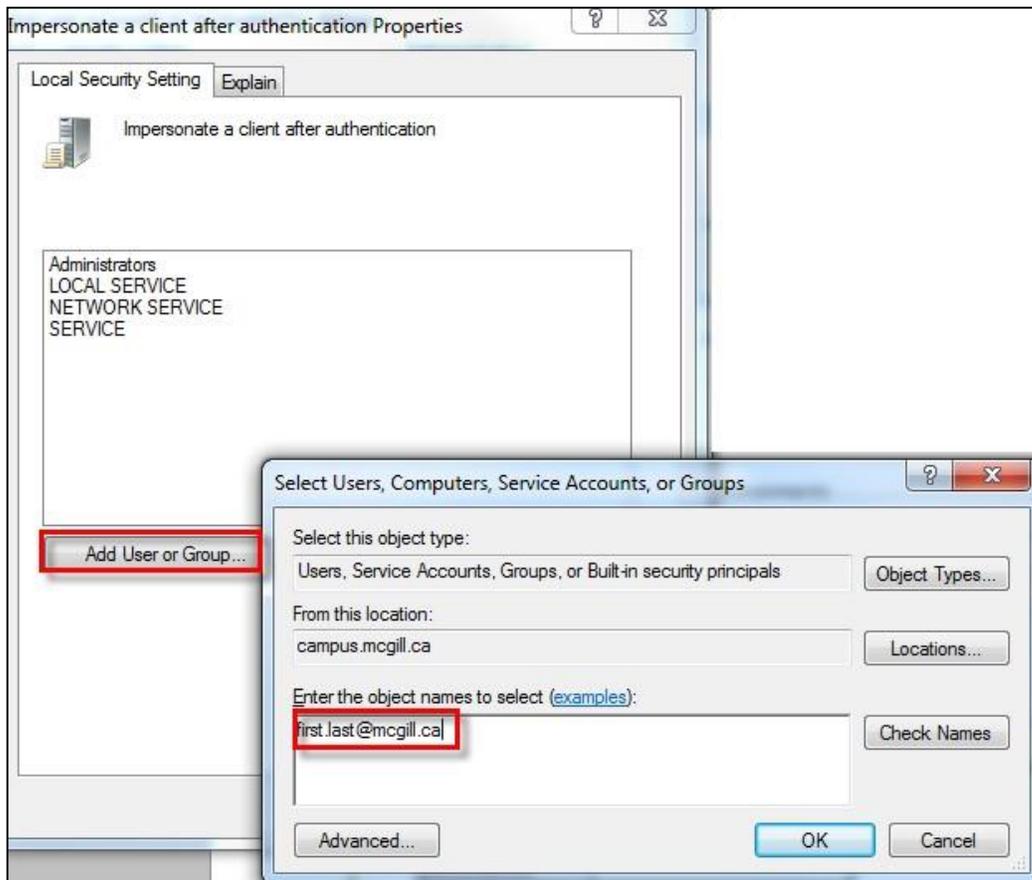
# First time users: Before logging into Document Manager

Make BANNER.MCGILL.CA your default Data Source:

1. Go to **Start** > **All Programs** > **ApplicationXtender Desktop** > **Data Source Selector**.
2. Double-click on BANNER.MCGILL.CA in the list, or select it and click **Set as Default**;
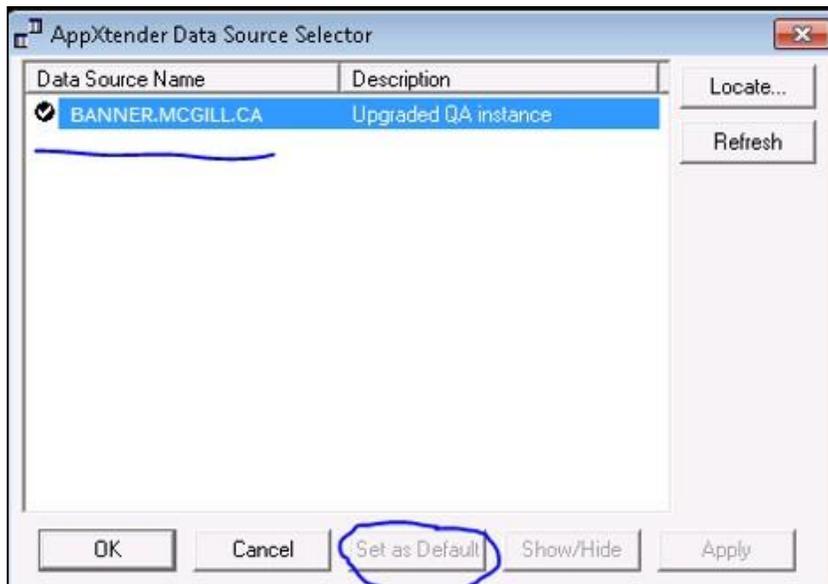
# Document Manager – Application view

When you enter the Document Manager for the first time, you don't see the application view. To view the application window:
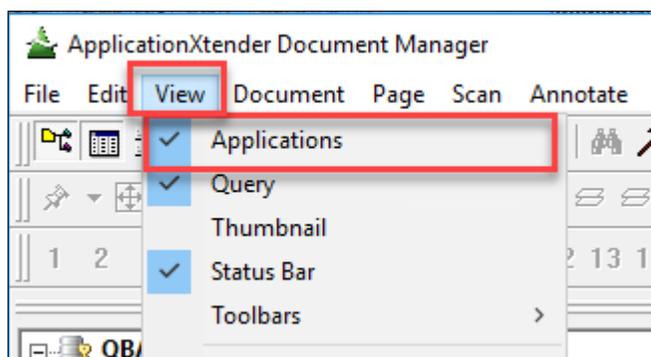
1. Launch **Document Manager:**
   - From Banner INB OR
   - Directly from your Windows Desktop (click **Start > ApplicationXtender Desktop > Document Manager**)
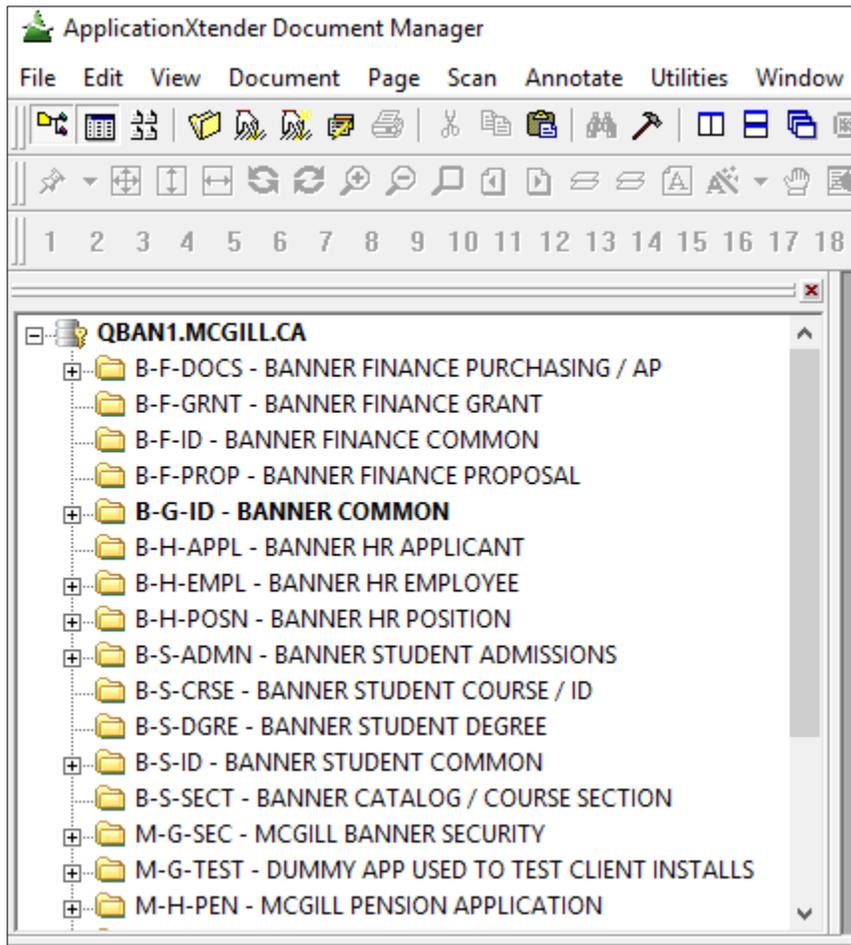


When launching from the desktop, you will be prompted to log in with your McGill Short Username and Banner/AX Password.

2. If the window is empty, click the **View** menu and select **Applications**.
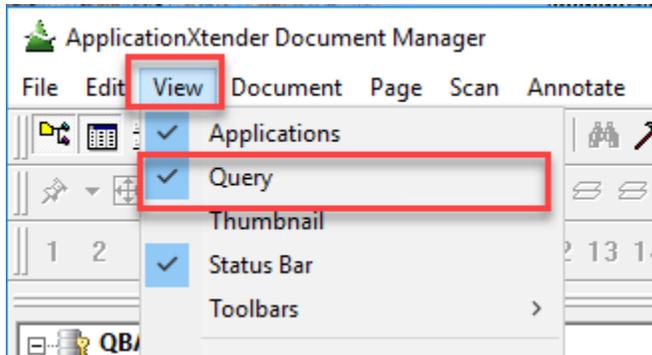
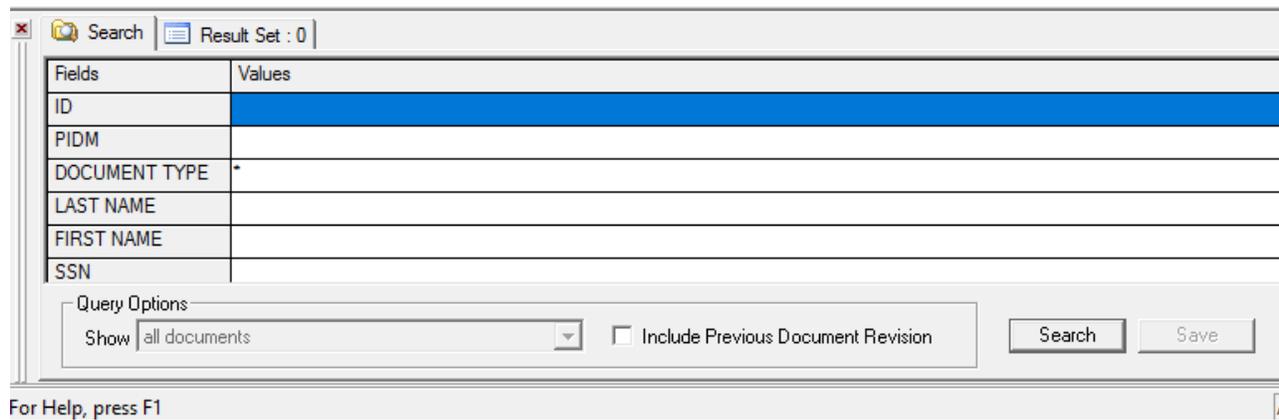You will now see the applications that you have access to.

**ApplicationXtender Document Manager**

File  Edit  View  Document  Page  Scan  Annotate  Utilities  Window

1  2  3  4  5  6  7  8  9  10  11  12  13  14  15  16  17  18

- **QBAN1.MCGILL.CA**
  - B-F-DOCS - BANNER FINANCE PURCHASING / AP
  - B-F-GRNT - BANNER FINANCE GRANT
  - B-F-ID - BANNER FINANCE COMMON
  - B-F-PROP - BANNER FINANCE PROPOSAL
  - **B-G-ID - BANNER COMMON**
  - B-H-APPL - BANNER HR APPLICANT
  - B-H-EMPL - BANNER HR EMPLOYEE
  - B-H-POSN - BANNER HR POSITION
  - B-S-ADMN - BANNER STUDENT ADMISSIONS
  - B-S-CRSE - BANNER STUDENT COURSE / ID
  - B-S-DGRE - BANNER STUDENT DEGREE
  - B-S-ID - BANNER STUDENT COMMON
  - B-S-SECT - BANNER CATALOG / COURSE SECTION
  - M-G-SEC - MCGILL BANNER SECURITY
  - M-G-TEST - DUMMY APP USED TO TEST CLIENT INSTALLS
  - M-H-PEN - MCGILL PENSION APPLICATION

# Document Manager – Query View

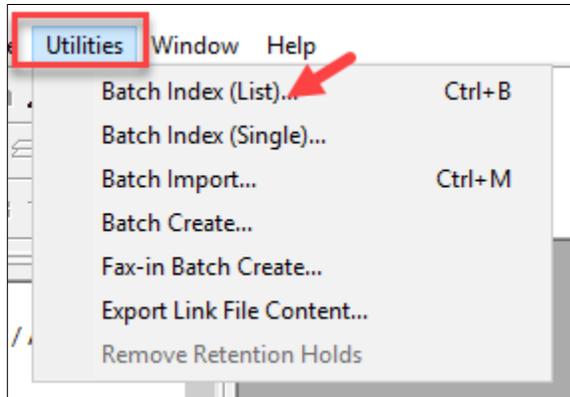1. From the **View** menu, select **Query.**



Query window

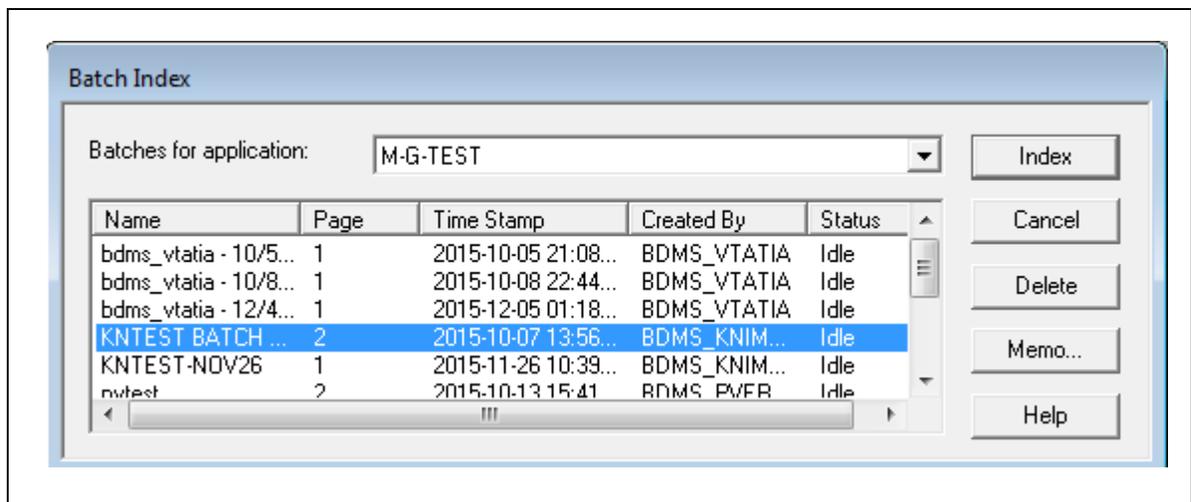# Document Manager – Index View

1. Log into **Document Manager**.
2. Select the application containing the batch for indexing from the left app view.
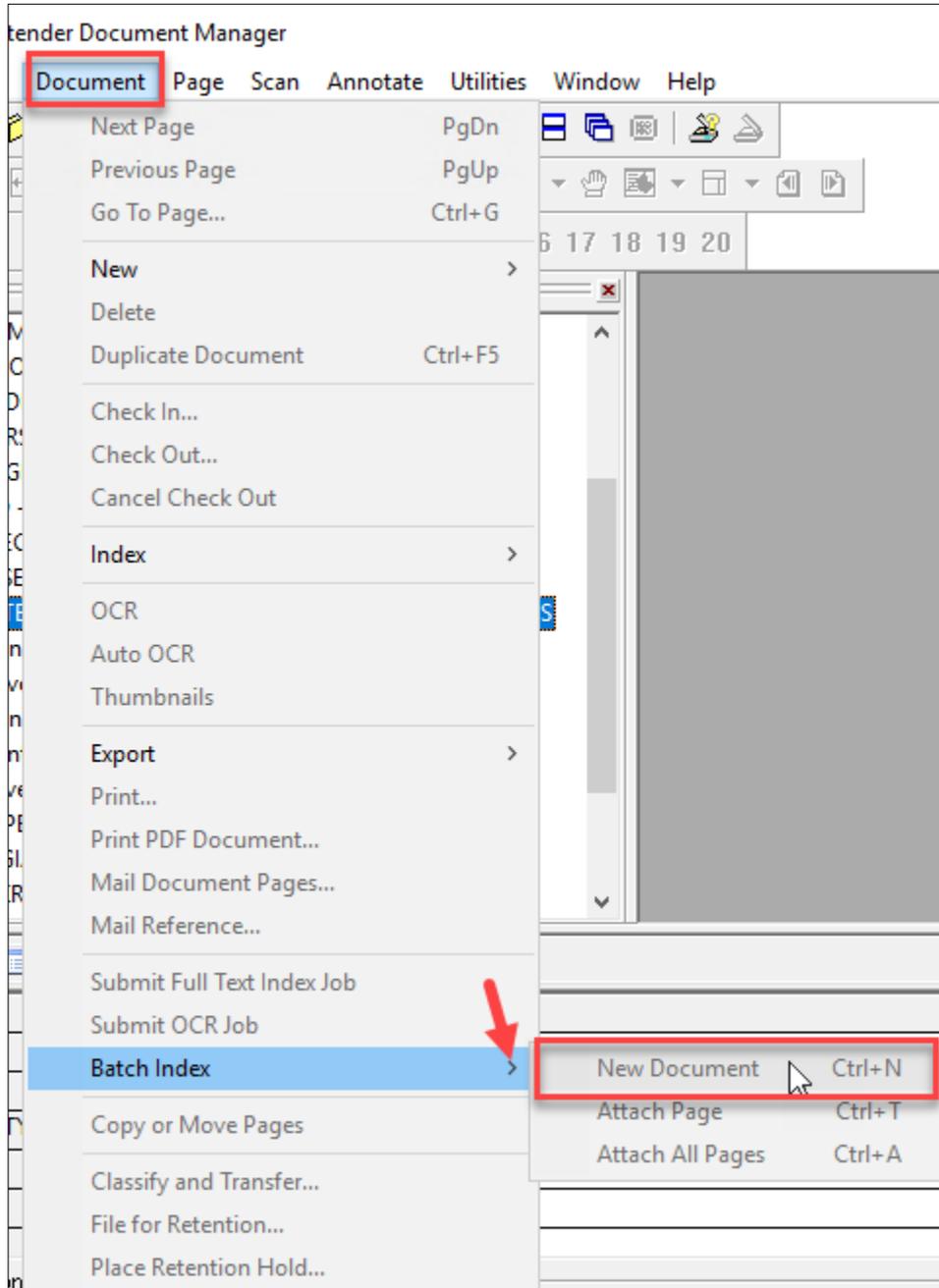


3. Click **Utilities** > **Batch Index (List)…**



4. Select a batch and click **Index**.



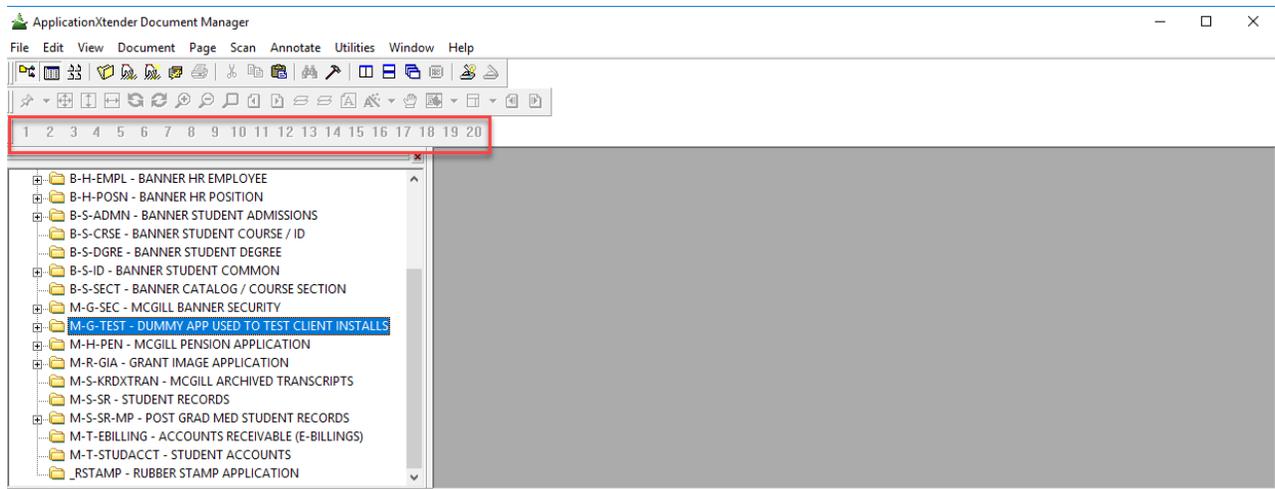5. Select **Document** > **Batch Index** > **New Document.**

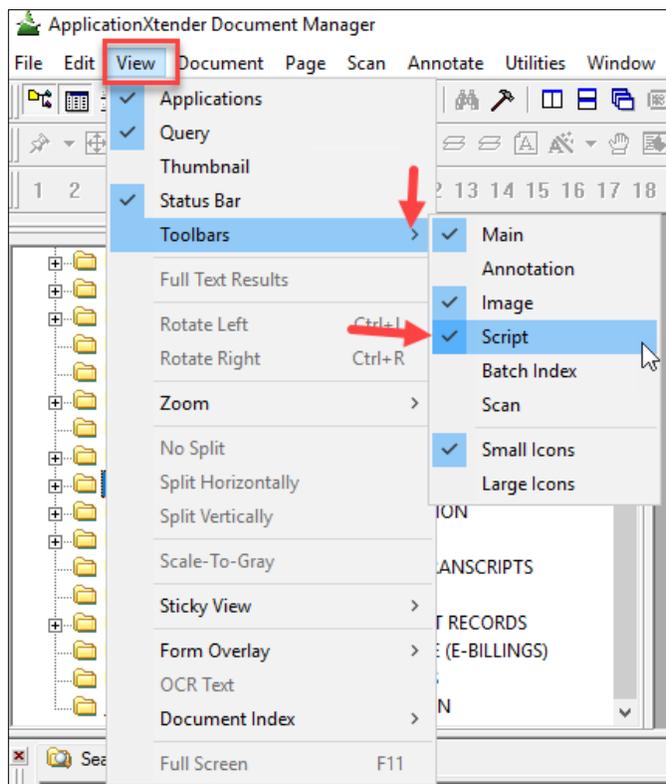5. Fields and names of indexing fields will be shown.

# Document Manager – Script View

When you first log into Document Manager, you see the script view (shown below).



This view is not used. To disable this view, click V**iew** > **Toolbars** and click on **Script**.



The script view will now disappear.

# AX Power Users – switching between environments

By default AX Desktop Suite is configured to point to PROD (BANNER) environment. Some Power Users will be required to work with other environments, such as BANQA.

To switch to a specific environment:

1. In Windows Explorer, go to your local folder: **C:\ProgramData** (Note: you may have to type C:\ProgramData into the address bar of Windows in order to see that folder)

2. If there is already a file named xscm.config, rename it to xscm.config.LOCAL (this will be a backup)
3. Open another Windows Explorer window and navigate to this folder on the network:
   \\Campus\Deptshare\BanVol1\Apps\AX7.0Setup\XSCM-Config

4. Copy all contents of this folder into **C:\ProgramData**
5. In C:\ProgramData, double click on the appropriate **.bat** file for the environment you want to access (DEV: switchToDEV.bat, QA : switchToQA.bat, PROD : switchToPROD.bat )
6. Launch the **Data Source** selector as usual and follow the normal process.
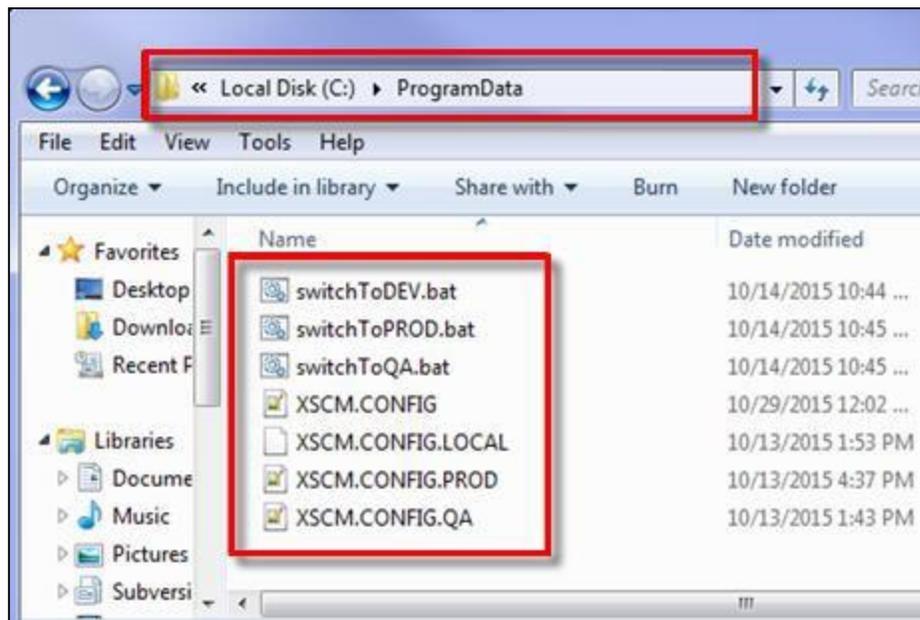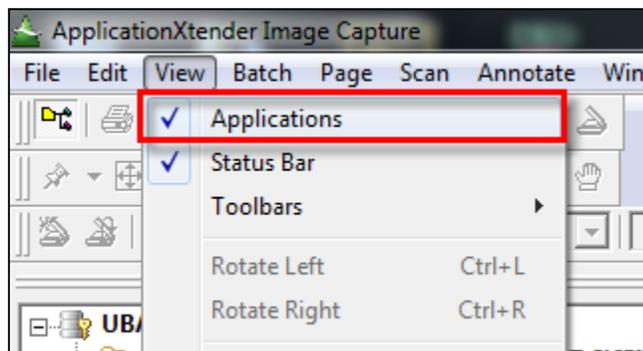
# Image Capture – Application view

First time users do not see the application view as shown below.
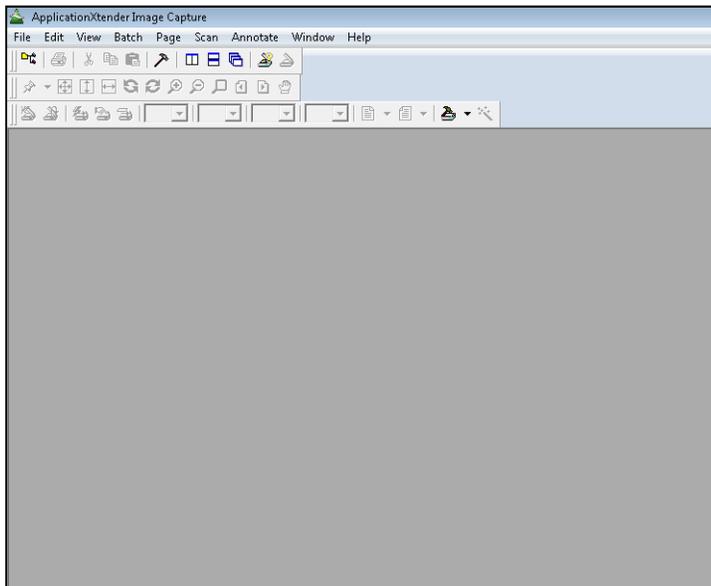


To view the application window:

1. Launch **AX Desktop > Image Capture.**
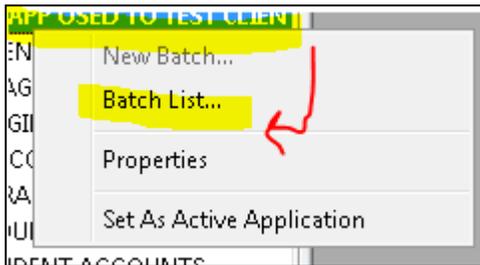2. From the menu, click **View > Applications.**



You will now see the applications.

# Image Capture – Patch List View

1. Right click on the application you want to view and select Batch List…



The Batch list will appear.

# Troubleshooting

If you see error messages from the web browser or within the AX Desktop application, refer to the IT Knowledge Base – search for "Banner Imaging (ApplicationXtender)".

If you need assistance resolving the errors, please contact the IT Service Desk at 514-398-3398 or email ITSupport@mcgill.ca.