

# ApplicationXtender Desktop Client User Guide

Last Updated: November 13, 2019

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## 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 (<u>Request access to AX</u>) 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 <u>ApplicationXtender tools via RD Web Access</u>
  - 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 <a href="http://kb.mcgill.ca/it/easylink/article.html?id=1001">http://kb.mcgill.ca/it/easylink/article.html?id=1001</a>



#### 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 ٠

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



#### **RemoteApp and Desktops**

#### Current folder: /A-Banner INB Prod







## 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





 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.

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becurity Settings	Policy	<u>^</u>		Security Setting	*	
Account Policies     Local Policies     Cal Policies     Gaudit Policy     Guer Rights Assignment     Windows Firewall with Advanced Seco     Network List Manager Policies     Goftware Restriction Policies     Goftware Restriction Policies     Goftware Restriction Policies     Advanced Audit Policy Configuration	Access Credential       Access Credential       Access Credential       Access this computed of the second of	Manager as a trusted ter from the networ operating system to domain data for a process y grigh Remote Desktop lirectories Allow log on locally Local Security Setti Allow log Administrators Backup Operato Guest	celler k Services Properties g Explain g on locally Select Users, Comp Select Users, Comp Select Users, Comp Select Users, Service Ac From the location: campus mcgil.ca Enter the object ng Idd41SR XAAcco	Everyone, Administrators LOCAL SERVICE, NETWO Guest, Administrators, Ba Administrators, Remote Administrators, Backup Q S puters, Service Accounts, or Group ppe: counts, Groups, or Bult-in security prin mes to select (examples): untal	s cipals	Object Types Locations
		Add User or Add User or Modifying , and applic For more in	Advanced ations. formation, see <u>Allow Ic</u>	ng on locally. (Q823659)	ОК	Cancel

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





McGill IT Customer Services Last Updated: November 13, 2019 Workstation settings Page 6 of 17 4. Enter your **McGill Username** (<u>first.last@mcgill.ca</u>) or an Active Directory group to which you belong in the textbox and click **OK**.

npersonate a client after au	uthentication Properties	
Impersonate a cli	ent after authentication	
Administrators LOCAL SERVICE NETWORK SERVICE SERVICE	Select Users, Computers, Service Accounts, or Groups	8 ×
Add User or Group	Select this object type: Users, Service Accounts, Groups, or Built-in security principals	Object Types
	From this location:	
	campus.mcgill.ca	Locations
	Enter the object names to select ( <u>examples</u> ):	
	first.last@mcgill.ca	Check Names



## 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;

Data Source Name	Description	Locate
BANNER.MCGILL.CA	Upgraded UA instance	Refresh
OK Cano	el Set as Default Show/Hide	Anniu



## **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:
  - $\circ \quad \text{From Banner INB OR}$
  - 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.



## **Document Manager – Query View**

1. From the View menu, select Query.

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File	Edit	Viev	w	Document	Page	Scan	An	notate
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11 .		-	Т	humbnail			-	
]] 1	2	~	St	tatus Bar				2 13 14
			Т	oolbars			>	
<b>D</b> 8	💡 QB	1						-

#### Query window

×	🔯 Search 📃 Res	ult Set : 0
	Fields	Values
	ID	
	PIDM	
	DOCUMENT TYPE	•
	LAST NAME	
	FIRST NAME	
	SSN	
	Query Options Show all document	nts Include Previous Document Revision Search Save
Ear	Halm, means E1	

For Help, press F1



## **Document Manager – Index View**

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

⊕ 🛅 M-G-TEST - DUMMY APP USED TO TEST CLIENT INSTALLS

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



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

atches for application	« М-С	i-TEST			-	Index
Name	Page	Time Stamp	Created By	Status		Cancel
bdms_vtatia - 10/5	1	2015-10-05 21:08	BDMS_VTATIA	Idle	-	
bdms_vtatia - 10/8	1	2015-10-08 22:44	BDMS_VTATIA	Idle	=	Delete
bdms_vtatia - 12/4	1	2015-12-05 01:18	BDMS_VTATIA	Idle		
KNTEST BATCH	2	2015-10-07 13:56	BDMS_KNIM	Idle		Memo
KNTEST-NOV26	1	2015-11-26 10:39	BDMS_KNIM	Idle		Memo
mula al	2	2015-10-13 15:41	BOMS PVEB	Idle		

5. Select Document > Batch Index > New Document.



tender Document Manager	
Document Page Scan Annotate Utilitie	s Window Help
Next Page PgDn	8 🖻 📧 🌋 🗻
Previous Page PgUp	
Go To Page Ctrl+G	
New	
Delete	X
C Duplicate Document Ctrl+F5	
D Check In	
C Check Out	
Cancel Check Out	
Index >	
C OCR	G
n Auto OCR	
Thumbnails	
n Export >	
/ Print	
PF Print PDF Document	
Mail Document Pages	
Mail Reference	· · · · · · · · · · · · · · · · · · ·
Submit Full Text Index Job	
Submit OCR Job	
– Batch Index	New Document Ctrl+N -
Copy or Move Pages	Attach Page Ctrl+T
Classify and Transfer	Attach All Pages Ctil+A
File for Retention	
Place Retention Hold	

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

Fields	Values	Γ
DOCUMENT TYPE	SAMPLE	
COMMENT		
ACTIVITY DATE	2015-12-14 12:56:52	



Document Manager – Index View Page 13 of 17

### **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 View > Toolbars and click on Script.



The script view will now disappear.



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#### **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.

ApplicationXender Image Capture File Edit View Batch Page Can Annotate Window Help ・ では、「このののののでいた。 、 こののののでいた。 、 こののののでいた。 、 こののののでいた。 、 こののののでいた。 、 こののののでいた。 、 このののでいた。 、 こののののでいた。 、 このののでいた。 、 このののでいた。 、 このののでは、 、 このののでいた。 、 このののでは、 、 このののでいた。 、 このののでは、 、 このののでいた。 、 このののでは、 、 このののでいた。 、 こののでいた。 、 このでいた。 、 こので、 このでのでいた。 、 このでいた。 、 このでいた。 、 このでいた。 、 このでのでいた。 、 このでのでいた。 このでのでいた。 このでのでいた。 このでのでいた。 このでのでいた。 このでのでいた。 このでのでいた。 このでのでいた。 このでのでのでのでいた。 このでのでいた。 このでのでいた。 このでのでのでのでいた。 このでのでいた。 このでのでいた。 このでのでいた。 このでのでいた。 このでのでいた。 このでのでいた。 このでのでいた。 このでのでのでいた。 このでのでのでのでのでのでのでのでのでのでのでのでのでのでのでのでのでのでので	
File Edit View Batch Page Scan Annotate Window Help	

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 <u>ITSupport@mcgill.ca.</u>

