ApplicationXtender (AX) Web Access User Guide

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Introduction

ApplicationXtender (AX) Web Access is a *new and more intuitive* application. This is an *all-in-one application* combining Document Manager and Image Capture's functionalities. These functionalities enable you to:

- Scan documents to create new or add to existing documents or batches, using Captiva Cloud Toolkit. To have this software installed on your computer, please contact IT Service Desk by emailing ITsupport@mcgill.ca or calling 514-398-3398.
- Add electronic files to the AX repository 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 by using various search methods, such as index value searches, multiple application searches, and document property searches. You can also select documents to view, edit, and print, and you can email documents and pages as attachments or links.
- Attach annotations, comment on the contents of the page, or block areas of the page from view.
- Modify index field values and export document indexes.
- File documents for retention to protect them from accidental losses.

Target audiences

Staff who uses Banner INB and need to view, scan, and/ or index documents.

Supported file types

Supported files are defined as those file types that AX can display within the AX Web Access page. The following file types are supported:

1. Text files (TXT)
2. Image files (JPEG, GIF, TIFF, Windows Bitmap, PCX, DCX, and TGA)
3. Adobe Portable Document Format (PDF) files
4. Rich Text Format (RTF) files
5. Hypertext Markup Language (HTML) files
6. Extensible Markup Language (XML) files

Unsupported - foreign file types

Unsupported file types are those that can be imported into AX web but cannot be displayed in the AX Web Access viewer. Example of foreign files include Excel spreadsheet files, MS-Word documents, PowerPoint files and videos.

Foreign files stored in AX can be viewed in one of two ways:

1. Download the foreign file. This option will display the foreign file within the application associated with the file type. For example, an Excel file will display within MS-Excel; Word documents will display in MS-Word and so on.
2. Render the foreign file. This option will attempt to display the contents within your web browser.

When you hover over the thumbnail of a foreign file in the query results screen, the document thumbnail will reveal that the document is a foreign file:
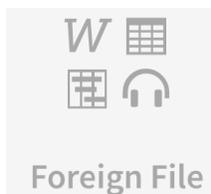
When a foreign file is opened in AX Web, it will provide the following options:

Clicking the "Download Foreign File" option will enable you to display the contents of the file in the native 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.

Clicking the "Render Foreign File" option will result in the file/document displaying in your web browser window. Both display options are acceptable if the intention is just to view the document, but the native application option such as Microsoft Excel provides more options.
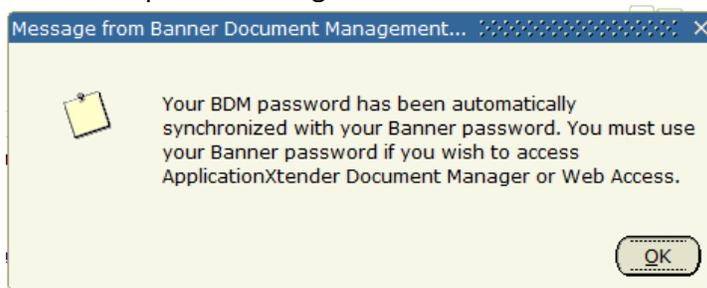
Sign in

There are two ways to log in to AX Web Access.

AX Web from Banner INB

Note: Please make sure that you have set up the User Preferences in Banner INB before launching AX Web Access.

1. Log in to Banner INB.
2. Click **BDM -Display Document** 🔍 icon either from the Banner home page toolbar or the Banner form (i.e., SAAADMS) toolbar.
3. A Message from Banner Document Management dialogue box will open to indicate that your BDM password has been automatically synchronized with your Banner password. Click **OK** to accept the message.

```
Message from Banner Document Management...  ▒▒▒▒▒▒▒▒▒▒▒▒▒  ✕

   📝    Your BDM password has been automatically
         synchronized with your Banner password. You must use
         your Banner password if you wish to access
         ApplicationXtender Document Manager or Web Access.


                                        (  OK  )
```

4. AX Web will open.

AX Web from a direct link

Note: Before using the AX direct link, you will need to synchronize your Banner password with AX password by following the From Banner INB steps above.

1. Open your web browser (i.e. Internet Explorer, Firefox or Safari) and enter the following URL: https://mcgill.ca/axweb .

2. Enter your *Banner UserID and the Banner password.

3. Click on the **Submit** button.

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

Can't login? Contact IT Service Desk via email at ITsupport@mcgill.ca or by phone at 514-398-3398.
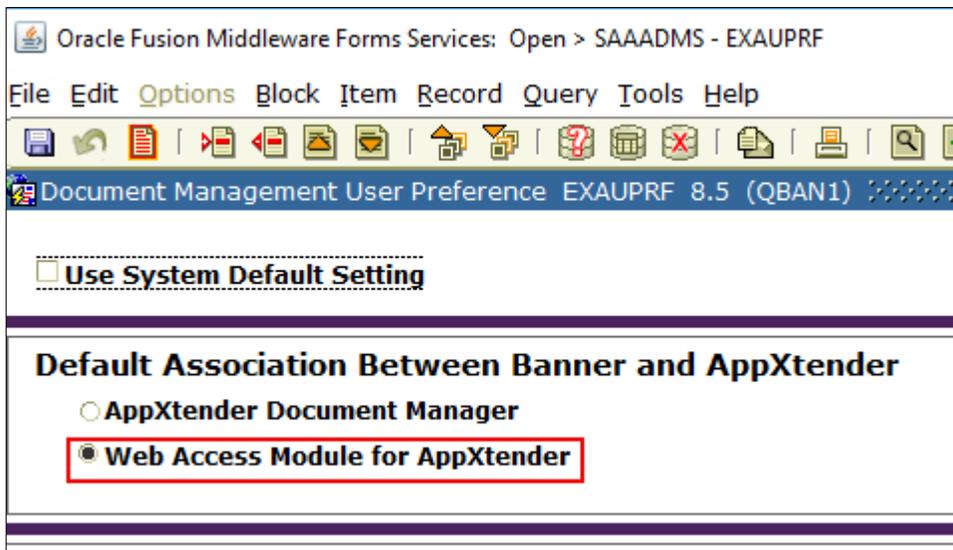
Set up 'User Preferences' in Banner INB

Before launching AX Web from Banner INB, please ensure that you have set your User Preferences in Banner INB.

1. Log in to **Banner INB**.

2. From Banner toolbar, click **Tools** > **Banner Document Management** > **User Preferences**.
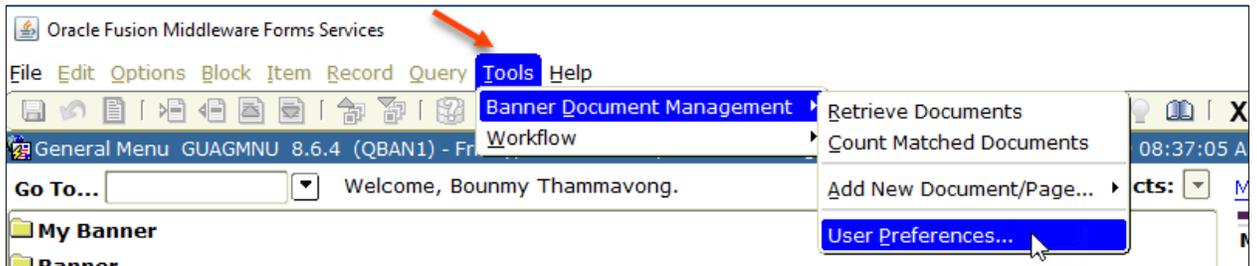
3. Under **Default Association Between Banner and AppXtender** section, select **Web Access Module for AppXtender**.

4. Click **Save** icon on the top left corner, and then go back to the Banner INB main menu.
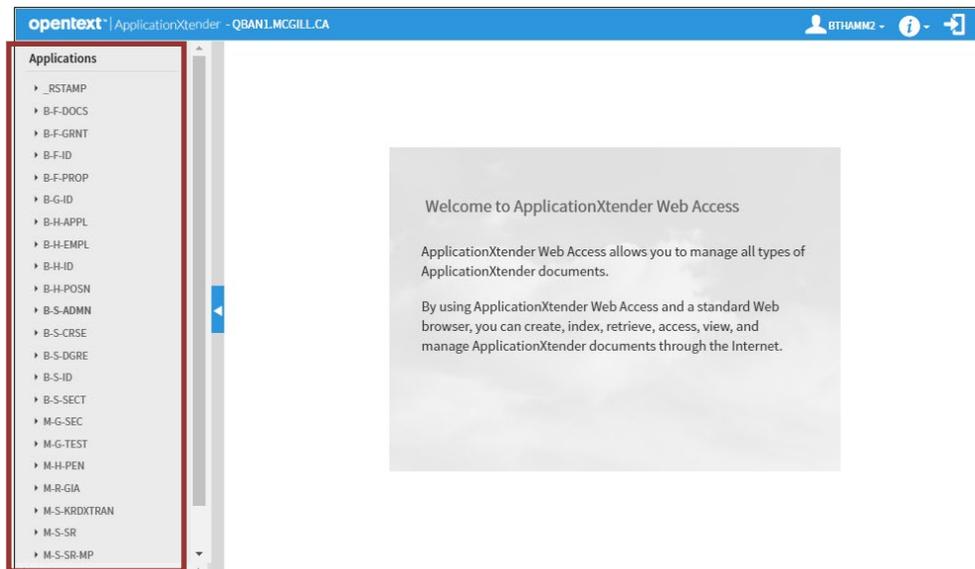
Welcome and Application page

1. The first time you log in to AX Web either from Banner INB or direct link, you will be taken to the AX Welcome page. This page provides the entry point into AX processing.
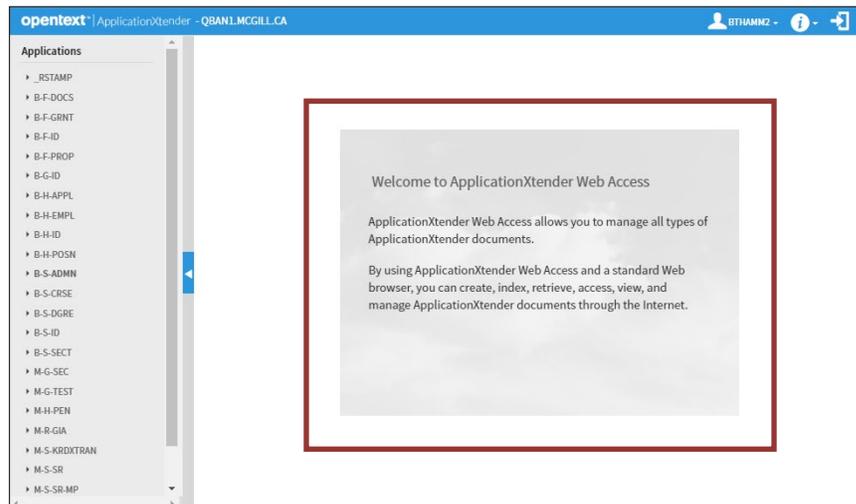
2. To begin using AX Web, click on the Application (on the left side) that you have access to. This will open the Application's home page.
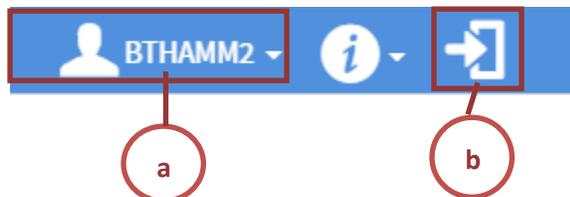
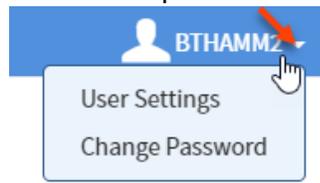3. The Application home page will display.
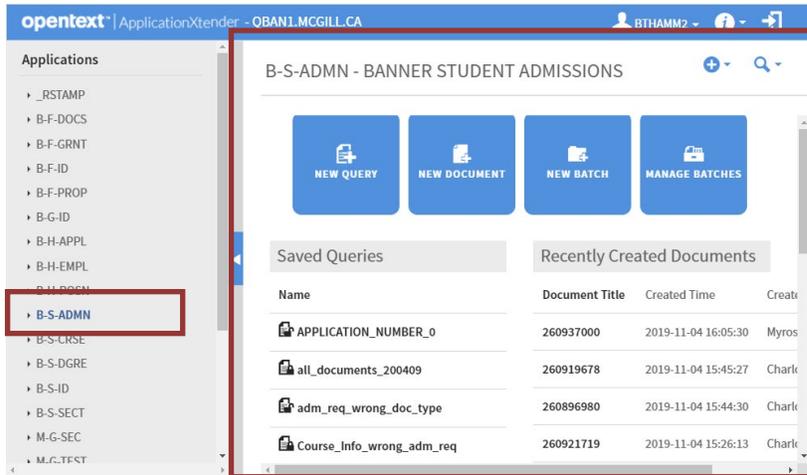
Application home page in details

Every Application home page will have the same look and feel. The following will discuss the Application home page in detail.

Top right corner menu

a. Displays your short username.
   i. Click on drop down arrow beside your short username.

- **User Settings:** allows you to change multiple settings in AX Web. For more details, refer to Appendix A: User Settings.
- **Change Password**: If you are using AX Web from Banner INB, we recommend to not change your password in AX Web because the AX password is synchronized with the Banner INB password. If you are using AX Web from a direct link, you can change your password here.

b. **Log out**: allows you to exit AX Web.

Application actions
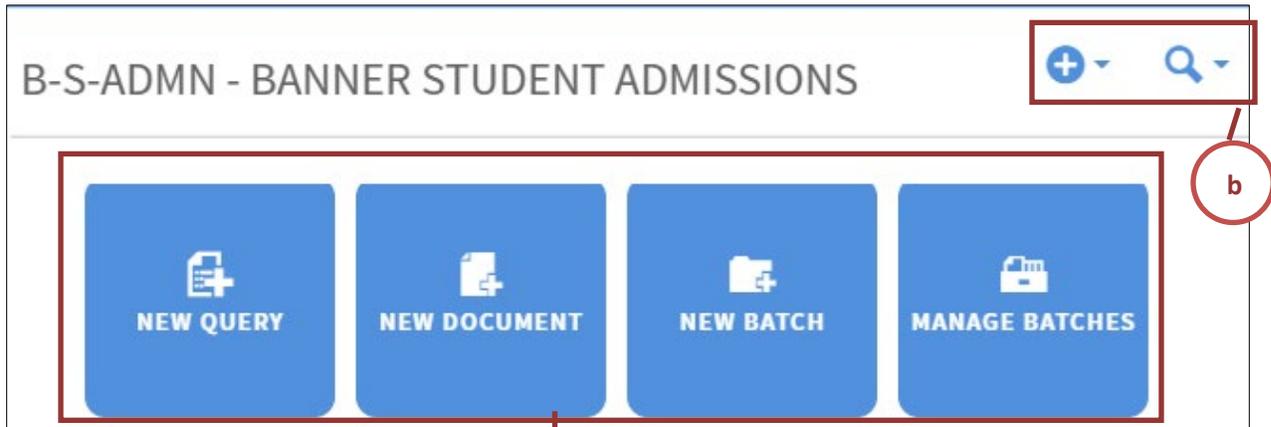
a. Application actions includes:
    - **New Query:** Opens the document search page.
    - **New Document:** Scan or import and index documents into one value.
    - **New Batch:** Scan or import documents into batches and index each page(s).
    - **Manage Batches:** Open list of batches that need to be indexed.

b. Quick access to application actions:

     access to New Document, New Batch and Manage Batches.

     access to New Query and New Multi-Application Search.

Saved queries and recently created documents

The Save Queries and Recently Created Documents only appear if:

- You have either saved your query for you to use or to share with others in your department.
- You have indexed some documents.

Saved Queries	Recently Created Documents	
Name	**Document Title**	**Created Time**
APPLICATION_NUMBER_0	260937000	2019-11-04 16:05:30

Queries

AX Web 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 query tool enables you to create a new query, edit an existing query, or run an existing query. After a query is created, it can be saved for later use. Saved queries appear under the application to which they belong.

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

How to create and run a new query

1. From the Application home page, click **New Query**.

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, the narrower the search and number of documents that will be returned.

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 save the query and run it at any time.

  a. **Name**: Enter a name for the saved search.

  b. (Optional) **Available to all users**:

     - If you check that checkbox, your query is shared with other users who have the same application access as you.

     - If you do not check that checkbox, your query is considered as a private query and only you can access it.
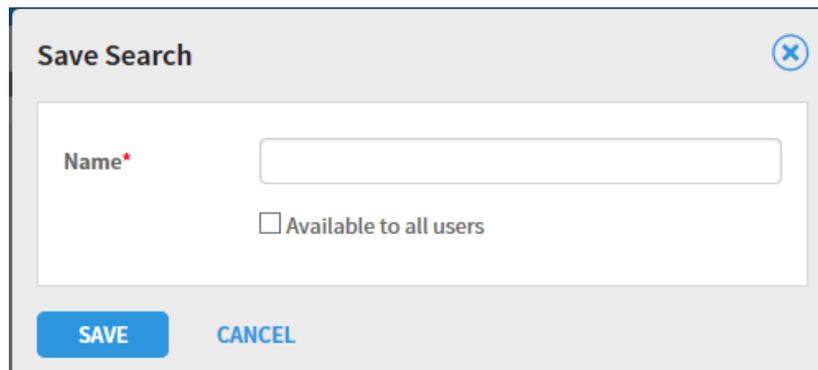
  c. Click **SAVE**: to save the query as the name you provided.

 d. Click **CANCEL:** to stop and exit the query.

Note 📎 | All saved searches will appear on the Application home page.

Methods of entering search criteria values

AX Web offers a wide 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**: 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 ID number to see all documents in an application for that student.
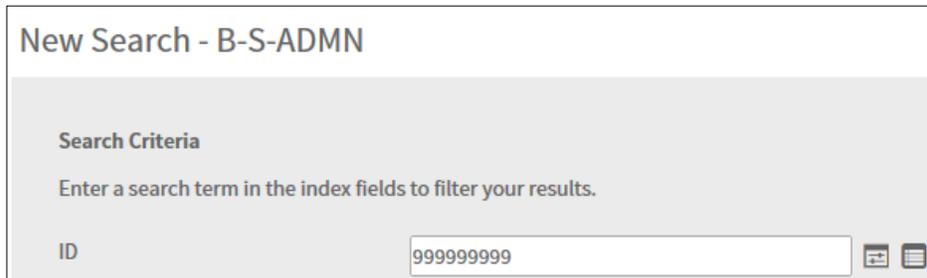
2. **Multiple select/input search criteria** – for search fields that are tied to a predefined list of values (i.e. Document Type) you can click in the field and enter or select one or more values.

In the example below, clicking in the Document Type field produced a list of values to select from. This search criteria method lets you select one or more values from this list.
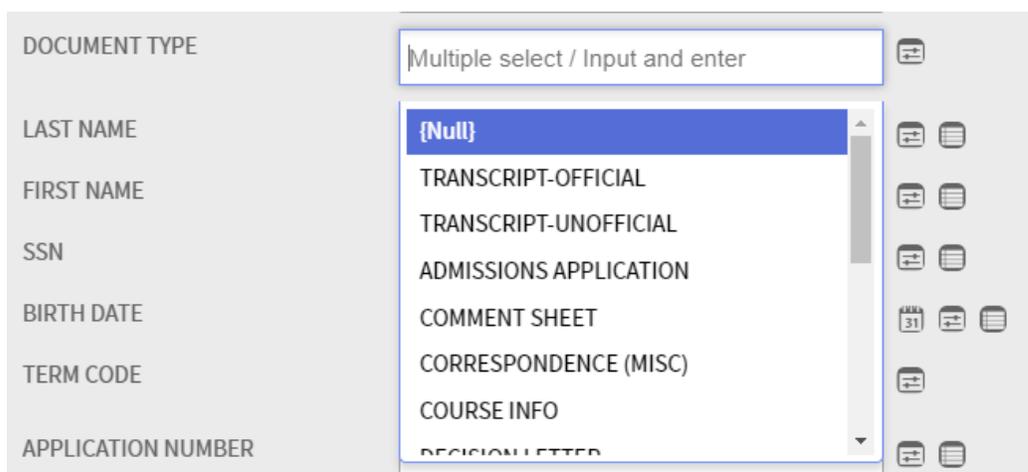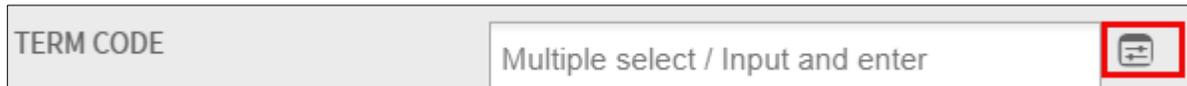
Once you have finished selecting the multiple selected list of values, the search criteria for that field will show them, as shown in the example below.
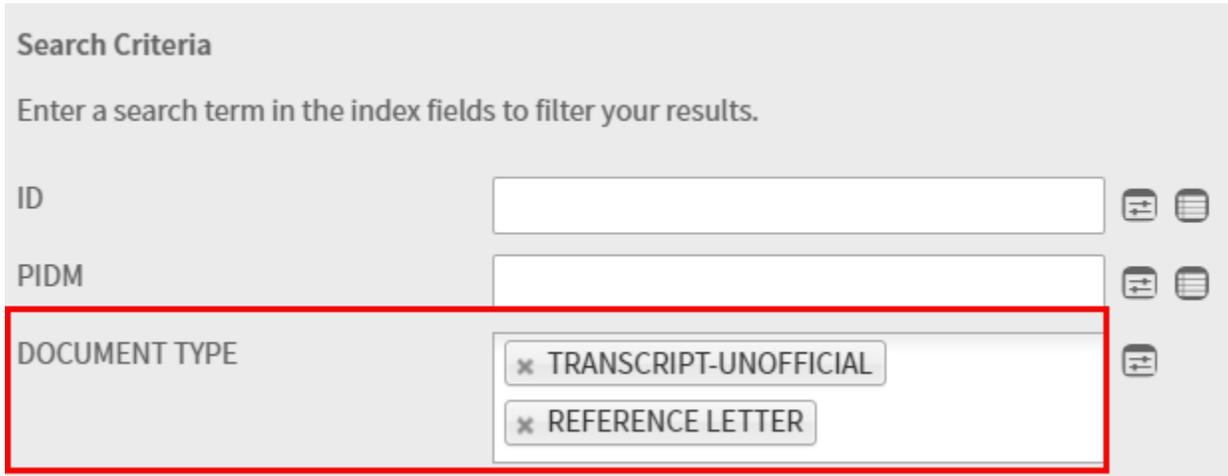
3. **Search Range Search Criteria –** to search based on a range of values, select the Search Range icon. In the example below, click on the Search Range icon next to the Term Code field to enter a range.

You will then be prompted to enter the range for the Term Code field (your beginning and ending values). Note that you can select from a number of relational operators from the "Type of Comparison" field, as shown below.
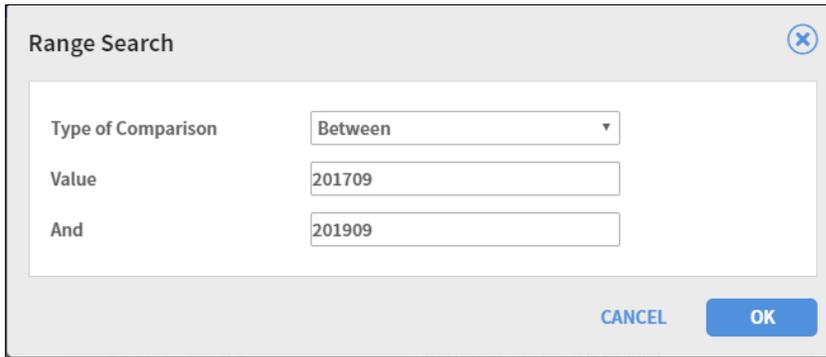
In the example below, since we chose B-S-ADMIN application, the query will search for all with a range of term codes between 201709 and 201909.

Range Search ⊗

Type of Comparison	Between ▾
Value	201709
And	201909

CANCEL **OK**

When you click OK, you will see the range of values displayed as an Expression in the TERM CODE search criteria as shown below:

TERM CODE   ✕ Expression: ['201709';'201909']   ⊞

4. **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 ID, you would click on the List search icon and enter each ID for your query. To use this query: click on the Search List icon next to a search field.

ID   ⊞ ▦

As shown below, you can enter multiple field values by pressing the ADD button to build your list of search values
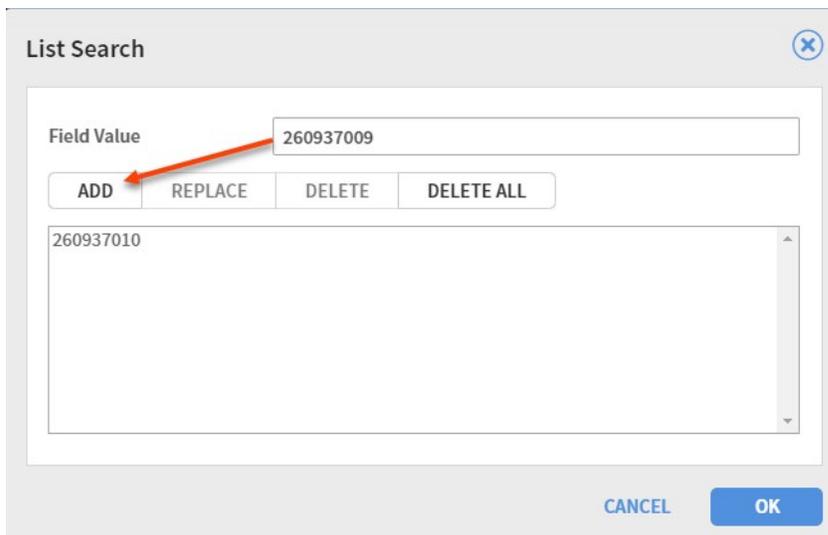
List Search ⊗

| Field Value | 260937009 |

ADD   REPLACE   DELETE   DELETE ALL

260937010

CANCEL **OK**

When you click OK, your List Search values will show in the Query criteria as shown in the example below:

Query results page

When you submit a query, one or more rows of query results will display in the Query Results page as shown in the example below.
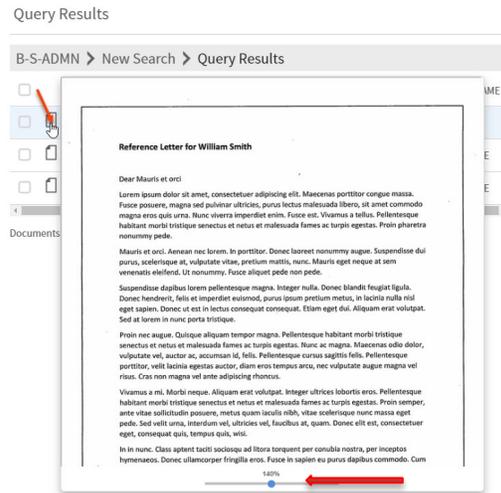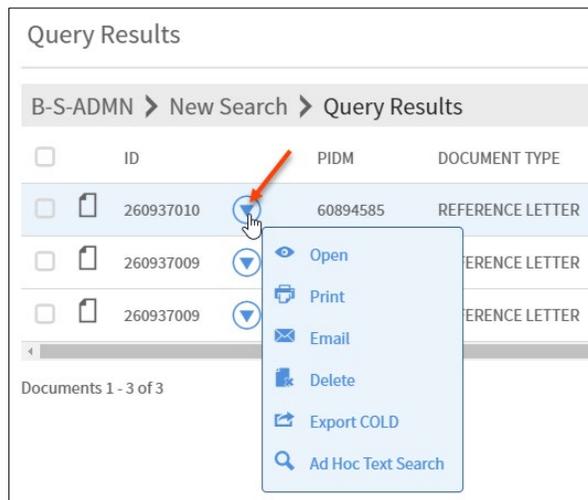
Query results fields

There are two important Query Results fields to emphasize.

1. **ID:** Hover your mouse over the document icon next to the ID to see a preview of the document(s). Note: you can use the slide at the bottom of the image to increase the view size.

2. **ID Actions**: click on the down-arrow beside the ID.
   - **Open:** it will open the document. The selected document will display with the options of adding annotations, modifying the index, or rearranging pages.
   - **Print:** allows you to print the selected document.
   - **Email:** allows you to email the document.
   - **Delete:** allows you to delete the document, if you have been given the rights to do this.

How to modify the query results fields

You can show/hide some of the query results fields.

1. From the Query Search page, click on the **Settings** icon.

2. Check or uncheck the Index fields by checking/unchecking the Display checkbox.

3. Click **SAVE** when you are done.

Multi-Application searches

You can use the Multiple Application Search functionality to create and run queries. These queries search multiple AX applications for the selected index information, full-text information, or both. For example, by using a multiple application search, you can search two different applications for information about a specific student ID number. Or, you could search for all documents containing the text "most recent software releases." Multiple application searches must be configured to search applications that are within the same data source.

Configuring multi-application searches

1. From the Application panel, select the application that you want to create a multiple application search for.
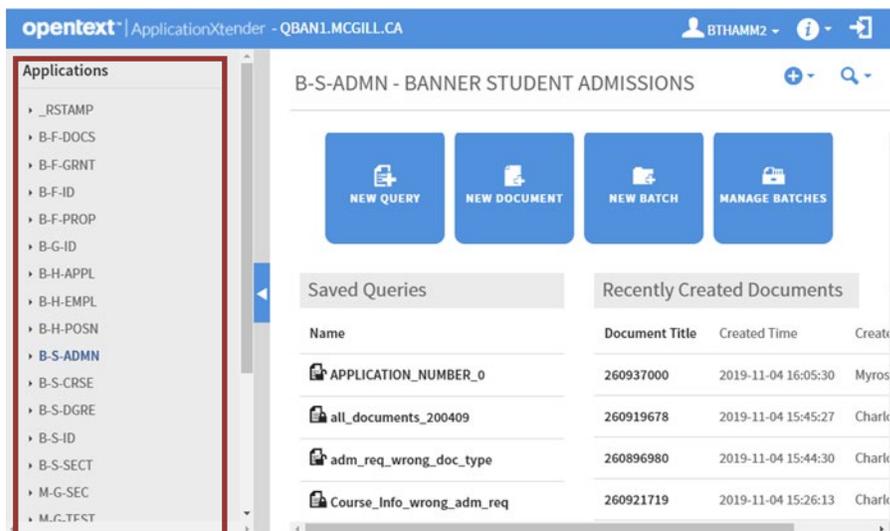
2. From the Application home page, click the **Search** icon 🔍 in the toolbar and select **New Multi-Application Search**.
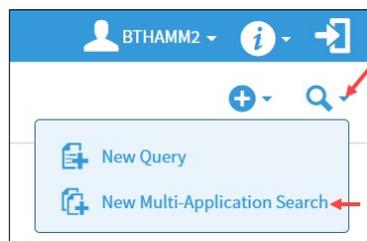
3. In the Configure Multiple Applications Search dialog box, select the applications that you want to include in the query, click the right-arrow and click SAVE, to add the selected applications (along with the associated index fields) to the Query Applications list.
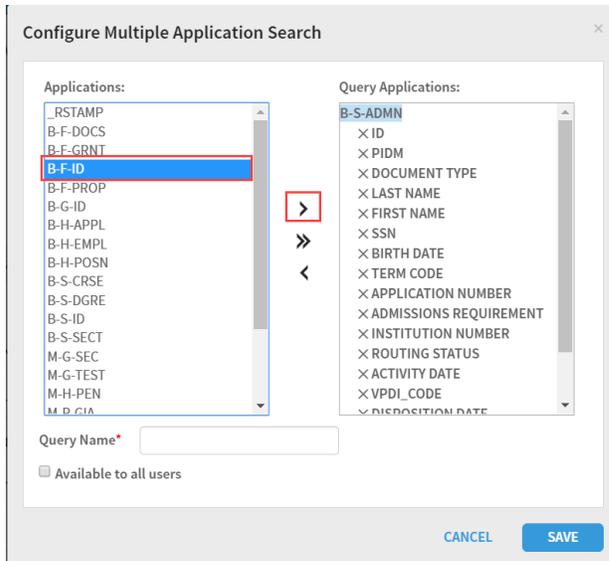
4. **Query Applications:** Configure the index fields for the multi-application query. The fields that are not used in a search criteria are identified by an X next to the field. You have the following choices for each field:

- Click a field once to make it displayable. A check mark ✓ appears next to the selected field to indicate that it appears in the search results, but is not used as a search criterion.
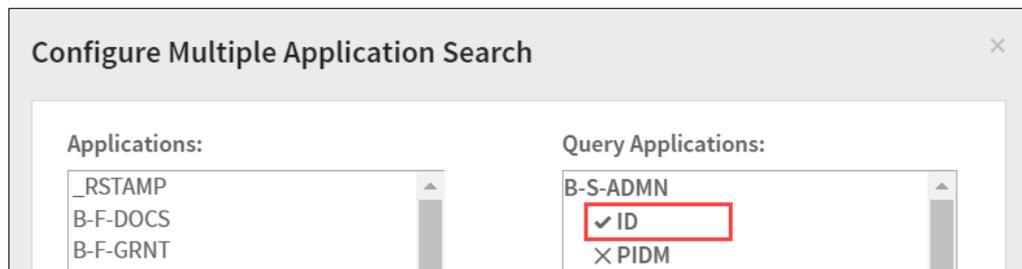
Note: If an index field that is made displayable is not common to the other selected applications, the field appears in the query results, but does not show any information for documents that are retrieved from those applications.

- Click a field twice to make it searchable. A search symbol 🔍 appears next to the selected field to indicate that it is used as a search field for querying documents.
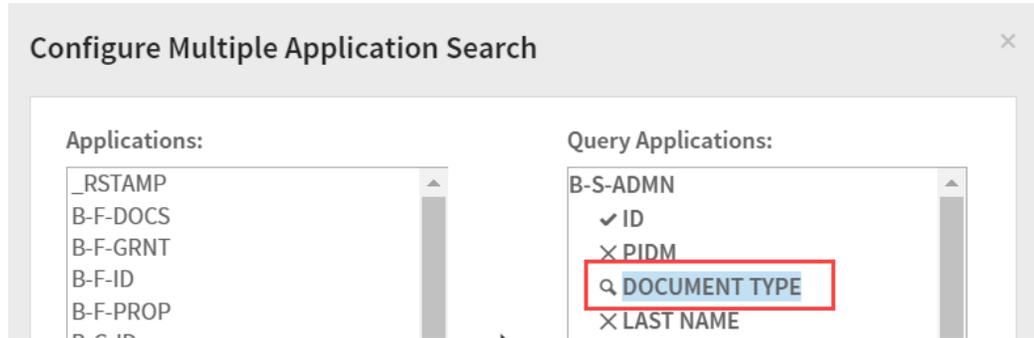
Note: Each application participating in a cross-application query must have at least one searchable field.

5. **Query Name:** Type a name for the multiple application search.

6. Select **Available to all users** to share the query with other users (public query). If you do not select this option, other users are restricted from using this query and the query is considered private.

7. Click **SAVE** when you are done.

8.   The Edit Search page displays the index fields that were configured as searchable. Specify the search criteria and **save** the query by clicking **SAVE**. If you simply want to run the query, click **RUN**.
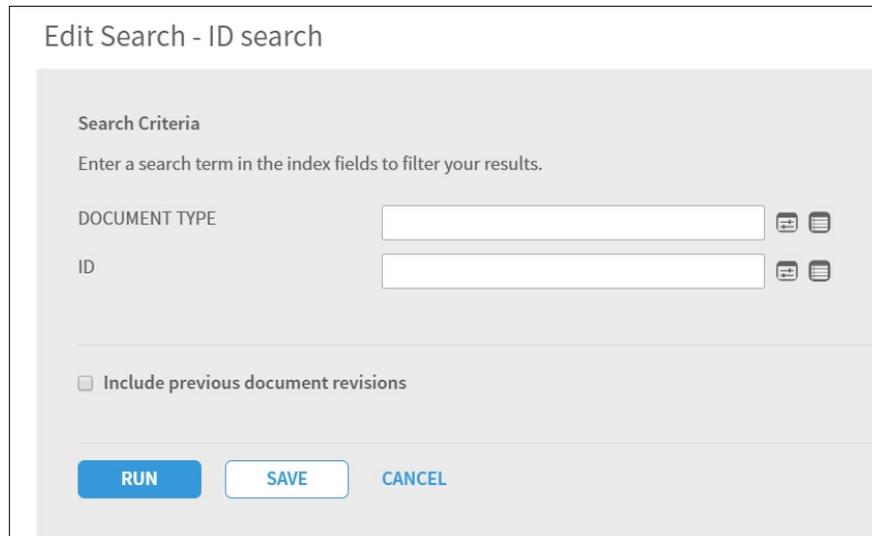
Edit Search - ID search

Search Criteria

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

DOCUMENT TYPE

ID

☐ Include previous document revisions

RUN   SAVE   CANCEL

9. The Save Search dialog box displays. Click **SAVE** to save the search on your Application home page.
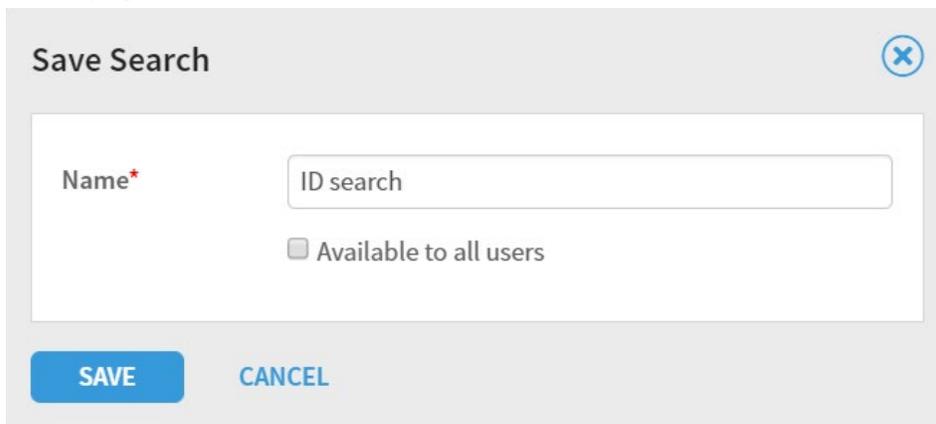
Save Search

Name* | ID search

☐ Available to all users

SAVE   CANCEL

Working with saved searches

You can use saved queries multiple times. When you save a query, you can make it available to all users. Otherwise, it is a private query that only you and the users with the Administrator privilege can access. The saved queries are available under the application for which they are created. A locked-padlock icon next to the query name indicates that the query is private. An unlocked-padlock icon indicates that all users can access and run the query. The query owner and the users with the Administrator privilege can edit a query to change:

- A private query to public, after which the query becomes available in the list of queries for all users and is preceded by the unlocked padlock icon.

   APPLICATION_NUMBER_0

- A public query to private, after which the query becomes unavailable in the list of queries for all users and is preceded by the locked padlock icon.

   all_documents_200409

| Note | Even if a multi-application query is listed as public, you can see the query only if you have access to at least one of the applications used in the query. Also, if you do not have access to all applications within a multi-application query, the query results do not show matches from the applications that are restricted. |

From the list of queries on the Application home page, select a query and right-click to open the context menu to view the list of operations you can perform on a query:

Option	Operation
☰ Run	To run query
✎ Edit	To edit the search criteria
✖ Delete	To delete a query
⚙ Configure	To configure a multiple application search

How to add a new page to an existing indexed document

Once you have conducted a search in AX, you can view the indexed documents, and then add additional page(s) to that indexed document. The scenario is you just searched for a specific student and now you want to add new pages to the existing indexed document type. For example, you would like to add more pages to Imogene Testaxy's reference letter.

1. Conduct your search and from the Query Results page, double-click on the desired document type. This will open the indexed document.

2. From the Thumbnails panel, click to select the page where you would like to add new page(s).

3. There are two ways to add a new page:

First method from Banner INB

a. If you are using AX web from Banner INB, click **Page** > **New Page** > **Import File**.
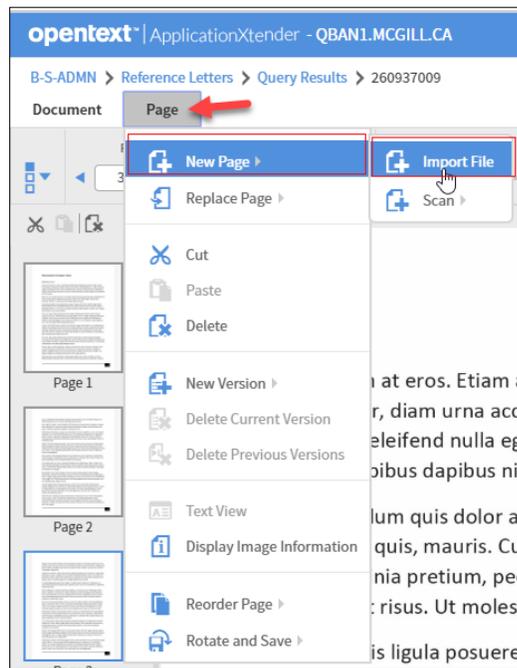
b. Find your file by clicking **Choose Files,** keep **Insert After** as is**,** and then click **UPLOAD**.
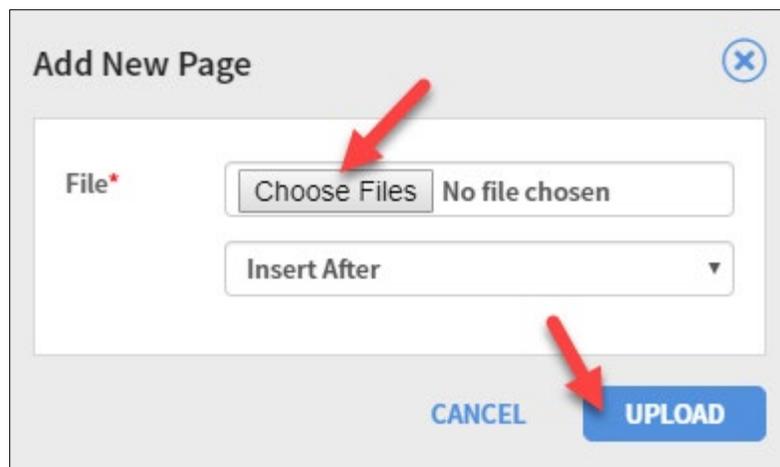
Second method from a direct web link

      a. If you are using AX Web from a direct link, you can click the document from your computer and drag it to the AX Web content area.
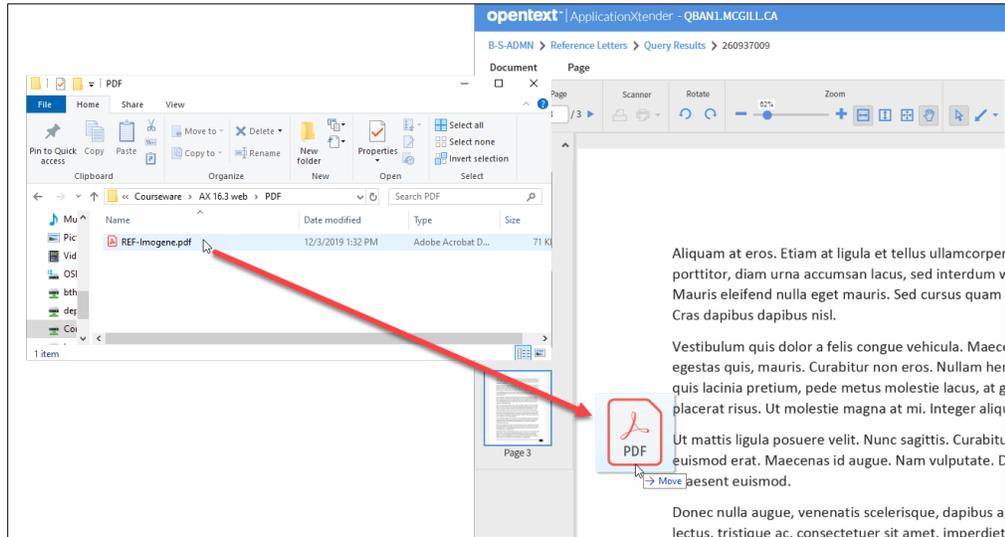
      b. From the ApplicationXtender Web Access dialogue box, keep **Insert Afte**r as is and click **OK**.
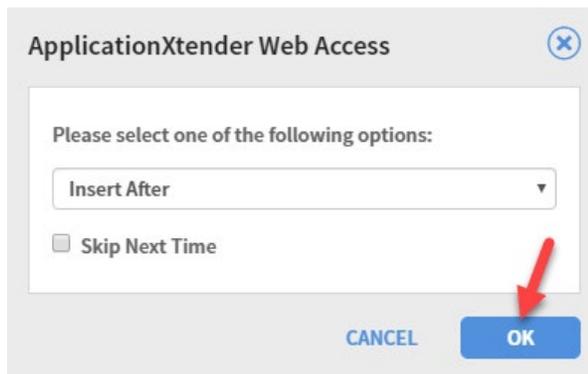
4. You will now see the added pages. The system will automatically save and keep the same indexed information.

Manipulate/ view documents

All documents display with the standard document/page toolbar as shown below.
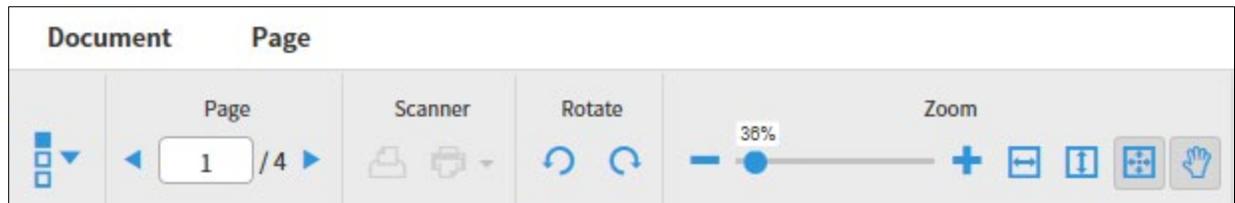
We will discuss each icon/section of the document/page navigation toolbar.

Thumbnail Icon – Show/Hide Thumbnails

The thumbnail toolbar allows you to turn thumbnail display on or off. When the arrow next to the icon is pointing down, thumbnails are displayed.

Clicking on the thumbnail icon changes the mode to hide thumbnails and the arrow will point to the right.

Page navigation Icon

The page icon displays the current page number of a document and also provides you a method of advancing between pages in a document. To navigate between pages, simply click the right or left arrows.

Rotate Icons – Rotate Page without saving page

The rotate icons enable you to rotate a page either clockwise or counter-clockwise. Note that the rotate icons will not display if the document is a [foreign file](#).

Zoom Icons – Zoom slider bar

The zoom slider bar provides an easy method of zooming in and out on a page. A page can be enlarged or shrunk by simply sliding the dot to the left or to the right.
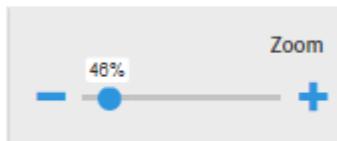
Zoom Icons – Fit Width, Fit Height or Fit to View

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

Thumbnails panel

Documents with two or more pages will display with the Thumbnail panel like the one shown below. The thumbnail view is helpful to see the pages at a glance, for navigation purposes.
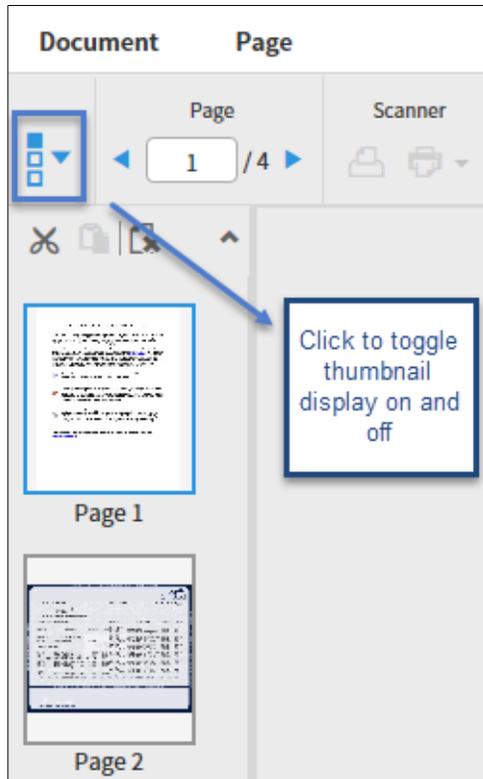
Thumbnail Actions – Change Page Order

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

1. Using a click-and-drag method.
2. Cutting a page and pasting it in a different order.

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 panel. Then, you will get a confirmation message.

Note 📎	The clicking and dragging pages to change the page order only works when you • have logged in to AX Web direct link and not from Banner INB; and • you are using the New Document feature and not the New Batch feature.

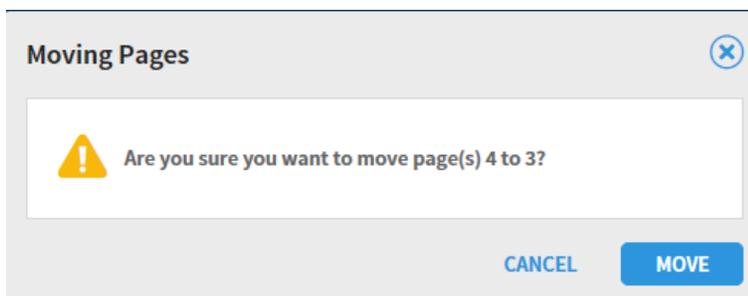**2. Cutting a page and pasting it in a different order:**

To move a page within a document using the Cut and Paste method, begin by selecting the page, and then clicking the Cut icon as show on the right side.	 Page 1
To paste the cut page, click on the page you wish to paste the cut page after. In the example shown on the right side, Page 2 was cut, Page 3 highlighted, and the Cut and Paste icon are now both highlighted.	 Page 1 Page 2
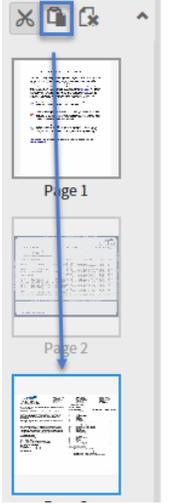
As with the click and drag method, you will be prompted to confirm the page move/paste action, as shown below.

Moving Pages ⊗

⚠ Are you sure you want to move page(s) 2 to 3?

CANCEL   **MOVE**
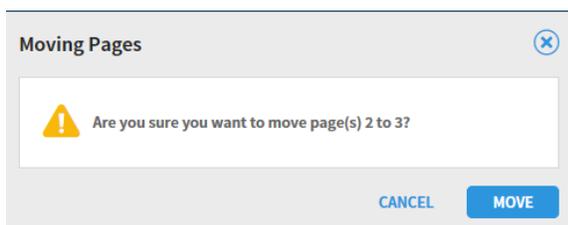
Annotations

AX Web enables users to attach annotations to documents or batch pages to highlight content, comment on the content of a page, or block content from viewing. Annotations are electronic overlays for documents. They don't alter the document/page itself.
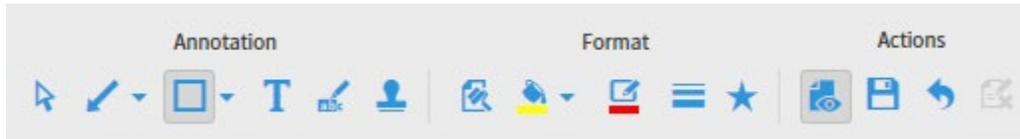
> **Note** Annotations can be added to images, PDF and text files, but cannot be added to protected PDF (i.e. official transcript) and foreign files (files like a Word or Excel document that can only be displayed by launching in your computer's Word or Excel application.)

Annotation types

1. **Line annotations**. This annotation type includes the straight line, freehand line, arrow and polyline.
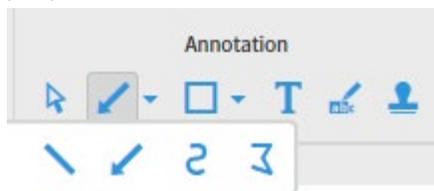
2. **Shape Annotations**. Shape annotations include the rectangle, rounded rectangle, oval and the polygon:

> **Note**
>
> For all shape annotations, the annotation Format options can be used. The format options allow you to change the fill and line color, and line width. The best way to learn shape annotations is by trial and error – try different format options to see the wide array of shape annotations you can create.
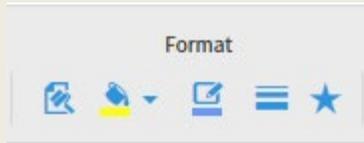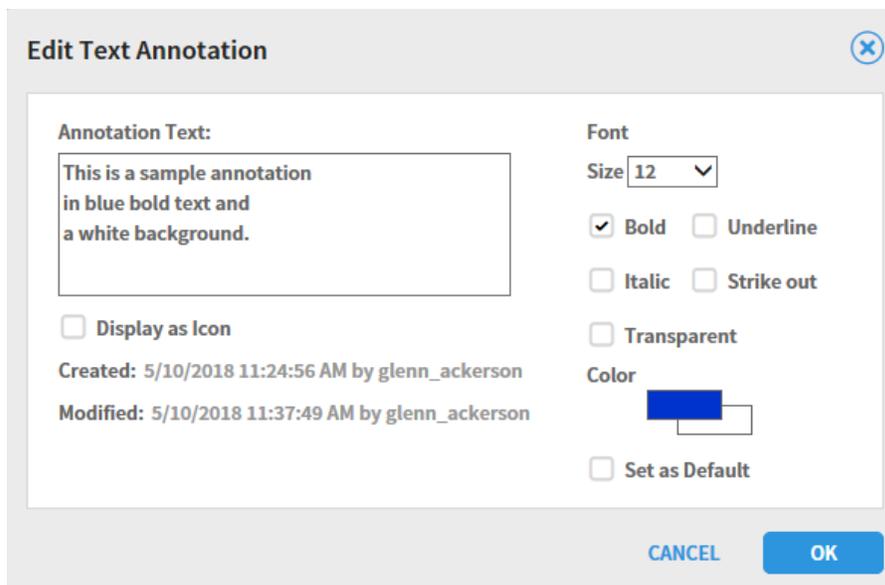>
> Format

3. **Text Annotations.** Text annotations create a text box that can be displayed as an icon or a box of text. To create a text annotation, click on the text icon and then click on the location on the page where you want the text annotation placed. Once you click on this location, the Edit Text Annotation dialog box appears as shown below.

Edit Text Annotation ⊗

Annotation Text:

This is a sample annotation
in blue bold text and
a white background.

☐ Display as Icon

Created: 5/10/2018 11:24:56 AM by glenn_ackerson

Modified: 5/10/2018 11:37:49 AM by glenn_ackerson

Font

Size 12 ⌄

☑ Bold   ☐ Underline

☐ Italic   ☐ Strike out

☐ Transparent

Color

☐ Set as Default

CANCEL   OK

4. **Highlight Annotations**. The highlighter annotation works like an electronic highlighter pen. Note that once you have highlighted a portion of a page, you can change the color and/or change the highlighted content.

Annotation   Format
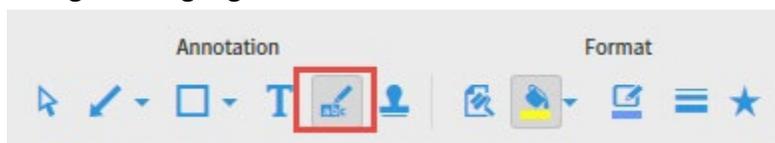
5. **Rubber Stamp Annotations:** Rubber stamp annotations are predefined text annotations that are created and maintained by the AX System Administrator. Unlike the text annotation, the text of the rubber stamp annotation is preset. Examples include "Approved" or "Processed By".

How to modifying/edit annotations

Annotations can be modified by either double-clicking the annotation, or right-clicking on an annotation and selecting properties. Either action will produce a dialog box like the following:
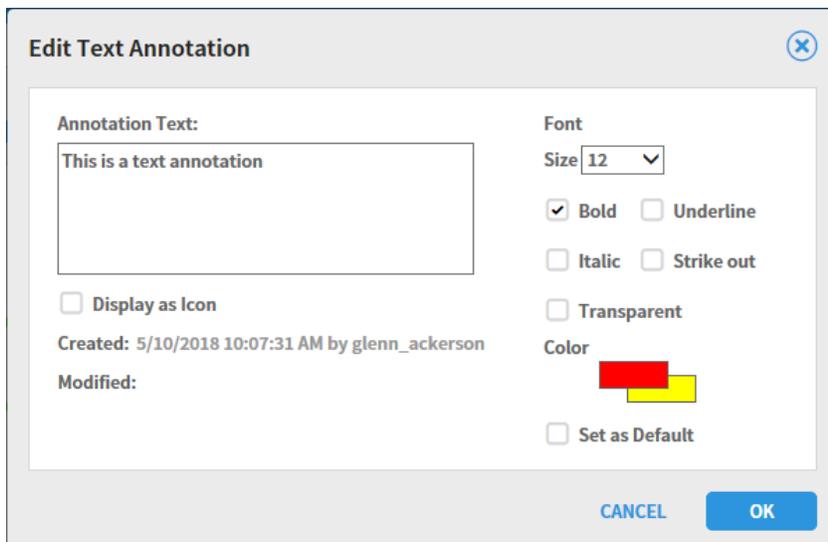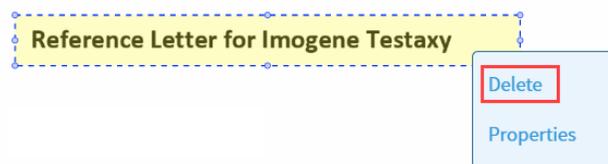
This option to edit an annotation allows you to change the annotation properties like font, color, etc. Note that the edit annotation dialog box properties will vary depending on the annotation being edited.
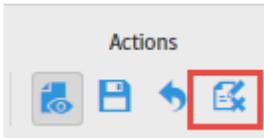
How to delete individual annotations

Annotations can be individually deleted one of two ways:

1. Right-click the annotation and select the **Delete** option:

2. Select the **Delete** icon from the Annotations toolbar:

## How to delete all annotations for a document

After you added some annotations, you can delete all annotations from a page by selecting the "Cancel Changes" icon from the Actions Toolbar. Be aware that this option removes all annotations and can't be reversed.
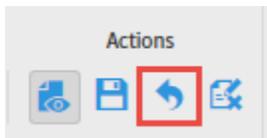
How to hide annotations

Annotation display can be toggled on and off by selecting the Show/Hide icon from the Annotation toolbar.
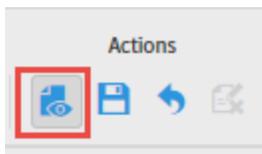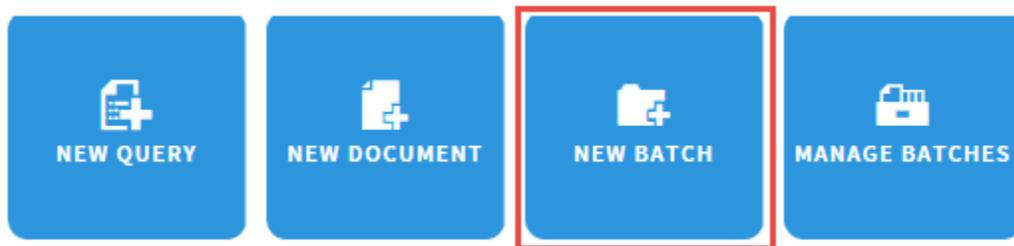
Batches

In AX Web, you can 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 a separate individual can process the batch of pages/documents in bulk.

How to create and import a New Batch

1. From the Application home page, click **New Batch**.

2. An Upload New Batch dialogue box will open.
   a. Fill in the following information:
      i. **Application:** Verify the Application name. If it not the correct one, select from the drop-down list.
      ii. **Name:** Enter a unique name.
      iii. **Description**: (optional) enter a description for this batch.
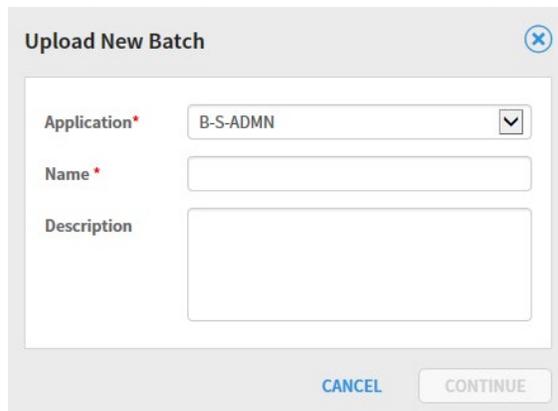
   b. When you are done, click **Continue**.
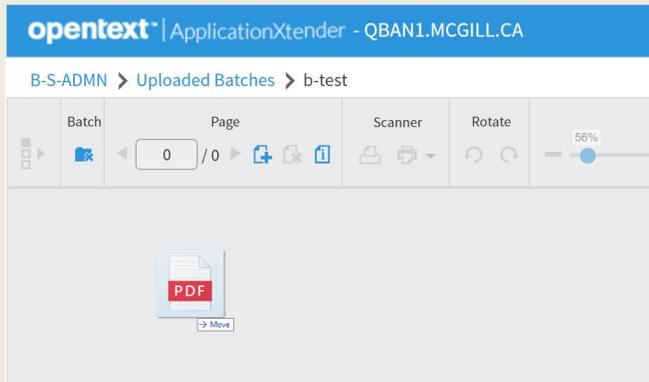
3. From the Batch page,
    a. Click the Add page icon.

    Page

    ◀ [0] / 0 ▶

    b. Find and import your files.

Note 📎

If you are using AX Web from a direct link, you can use the drag your files from your computer and drop your files to the batch.

opentext | ApplicationXtender - QBAN1.MCGILL.CA

B-S-ADMN › Uploaded Batches › b-test

Batch	Page	Scanner	Rotate	56%

◀ [0] / 0 ▶

PDF

→ Move

4. Your files will appear in the Batch page, and you are done with creating and importing a new batch.
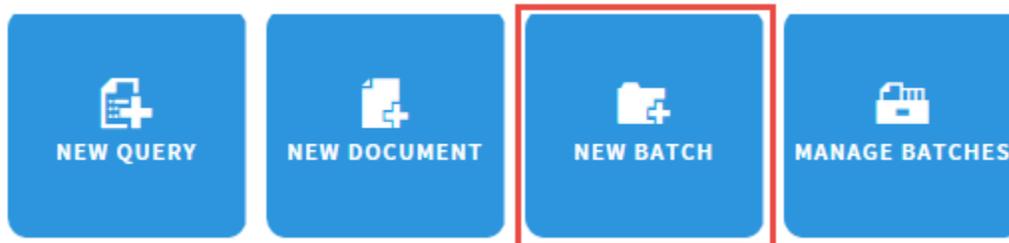
How to scan a new batch

> **Note** 📎 Before using the scanning feature, please contact IT Service Desk to set up your scanner with Captiva cloud Toolkit by emailing ITsupport@mcgill.ca or calling 514-398-3398.

1. Turn on your scanner.
2. From the Application home page, click **New Batch**.

3. An Upload New Batch dialogue box will open.
   a. Fill in the following information:
      i. **Application:** Verify the Application name. If it not the correct one, select from the drop-down list.
      ii. **Name:** Enter a unique name.
      iii. **Description**: (optional) enter a description for this batch.
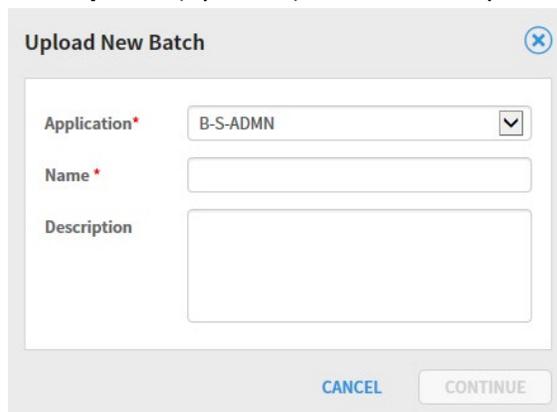
   b. When you are done, click **Continue**.

4. When the scanner is set up properly, you will see a **Scanner Access** message. Click **Allow** to accept the message.

5. Wait a few minutes for the Scanner icon to appear, and then click Scanner icon to begin.
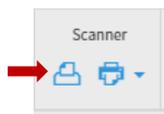
When the scanner icon is clicked, you will see the following message display:

6. Your scanned documents will appear in the Batch page, and you are done with scanning and importing a new batch.
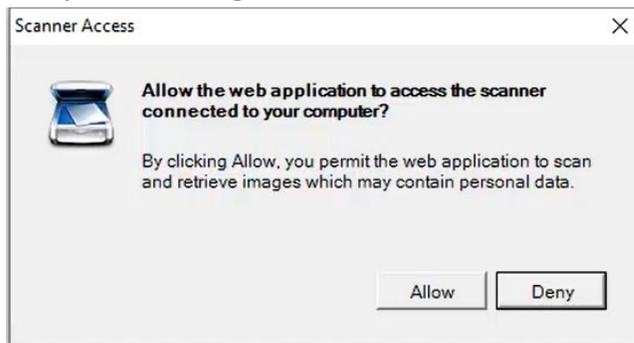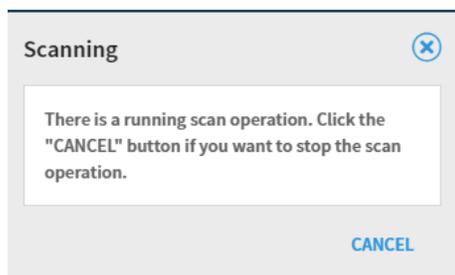
How to index a batch

Whether you just created a new batch or opened a scanned batch, the steps for indexing a batch will be the same.

> **Note**
>
> You will need to ask your department/unit for index criteria.

1. From the Batch page, click **New Document** icon to begin indexing.

2. The index panel will appear on the right.
    Note: you will need to ask your department/unit for the index criteria.
    a. Fill out the index information.
    b. Click **Save**. The indexed document will be removed from the batch.
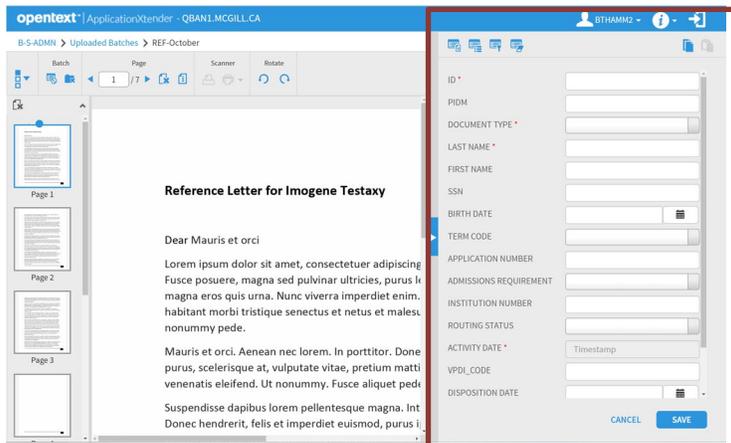
3. Decide the following index action for the next document:

- **Two methods to attach new document(s) to the previous indexed information**
  Scenario: you are indexing a reference letter that has three pages and you need to index all pages to the same student information.

First method:

    a. After you have indexed the first page, click to select the page from the Thumbnail panel on the left.

    b. Click **Attach** icon.

       The page is now attached to the previous indexed information.
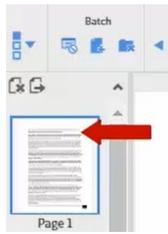
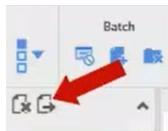*Second method:*

    a. After you have indexed the first page, click to select the page from the Thumbnail panel on the left.

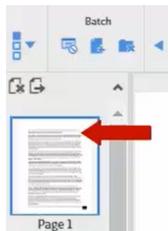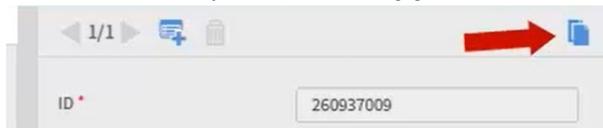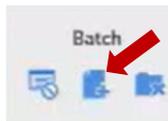   b. From the Index panel, click **Copy Index** icon.

    c. Click **Create Another Document** icon.

    d. Click **Past Index** icon from the top Index panel.

    e. Verify the index fields. Click **Save** when you are done.

f. A Document Index Duplicated message will appear. Click **Append** to the existing document.

Document Index is Duplicated

⚠️ The same index has been found in an existing document.
Select APPEND to append to the existing document.
Select CREATE to create a new document.
Select CANCEL to modify the index.

CANCEL   CREATE   **APPEND**
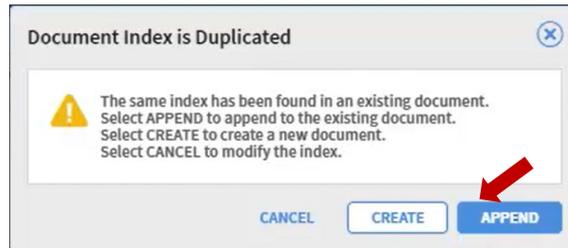
The page is now attached to the previous indexed information.

- **Index a new document**
  a. Repeat step 1 and 2 above.

- **Delete a document**

  a. From the Thumbnail panel, click to select the page.
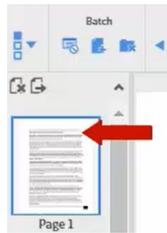
  b. From the Thumbnail panel, click **Delete** icon.

  c. A message will appear. Click **Delete** again.

1. From the Application home page, click **Manage Batches**.
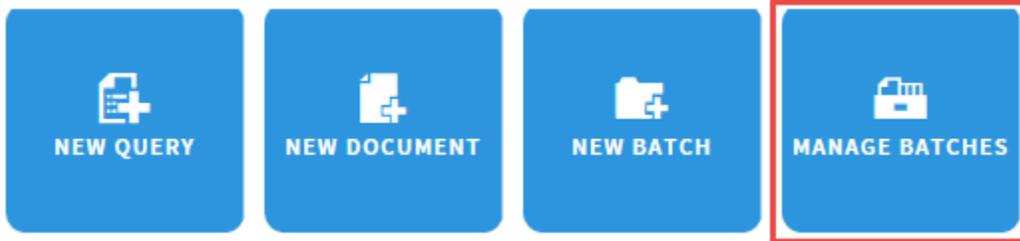
2. You will see list of all batches that have been created either from a scanner or via imported pages/documents.

Batches can be managed one 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:
   - Index: to begin to index the batch.
   - Import: to insert new documents.
   - Edit: to edit the batch name and/or the description.
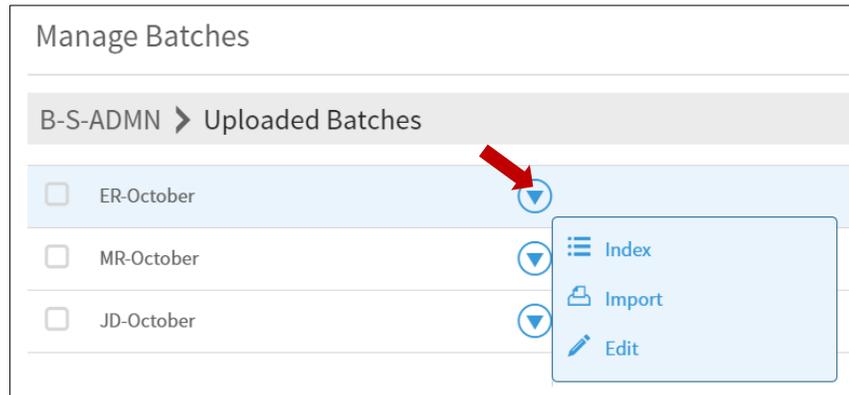
Copying or moving batch pages

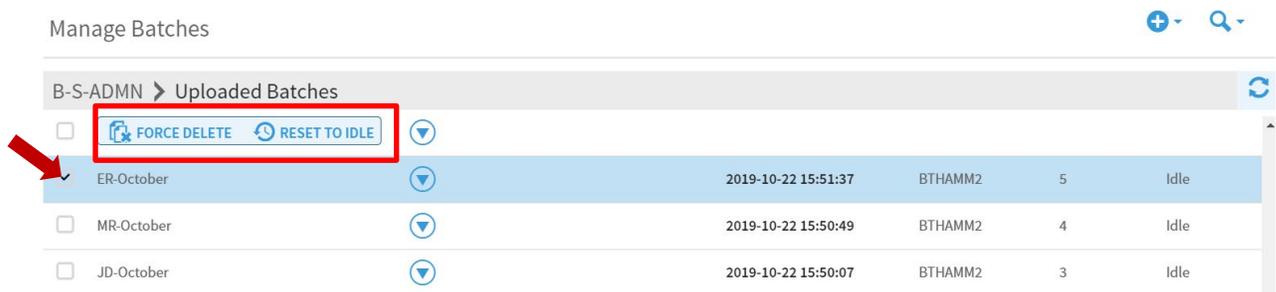AX Web Access enables you to copy or move batch pages between AX applications. It processes the pages as a new batch in the target application. You must have the Batch Scan privilege for the target application to copy and move batch pages.

1. From the Uploaded Batches list, select a batch, and then click **Import** on the context menu.
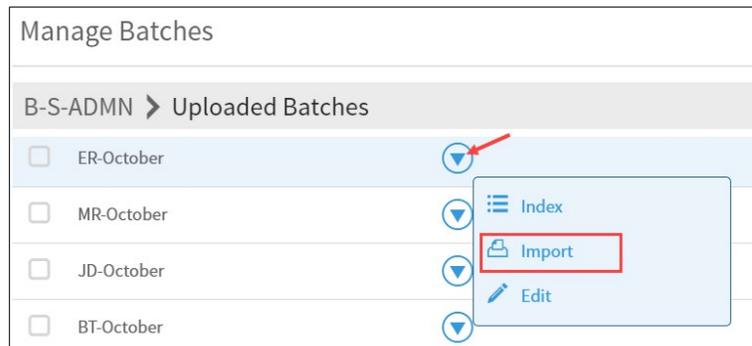
2. The selected batch opens in the Document Viewer. Click the **Copy Move Pages** icon on the Batch toolbar.
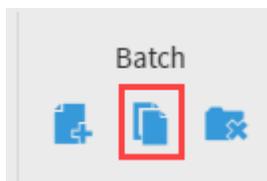
3. In the Copy or Move Pages to New Batch dialog box, specify the following:

Field	Description
Document Pages	The page number of the batch pages you want to move or copy. To specify a continuous page range, insert a hyphen between the first and last page. To specify separate pages, insert a comma between each page.
Target Application	The application to which you want to move or copy the pages.
Batch Name	The name of the batch.
Index New Document	Indexes the batch immediately after copying or moving the pages. If you do not select this option, select the batch from the Uploaded Batches list when you are ready to index the batch.

4. Click **MOVE** if you want to move the selected batch pages from the source application.
5. Click **COPY** if you want to leave a copy of the batch pages in the source application.

Move or copy document pages

AX Web Access enables you to move or copy document pages between applications. This function processes the pages as a new batch in the target application. You must have the **Batch Scan** permission for the target application and the **Delete Page** permission for the source application to move pages. The Batch Scan permission or the target application is sufficient to copy pages.

1. Search for your document.
2. From the Query Results page, click the drop-down arrow beside the ID and select **Open**.

3. Select the document page by using the page thumbnails, click the Document menu on the toolbar, and then select Copy or Move Pages.

4. In the Copy or Move Pages to New Batch dialog box, specify the following:

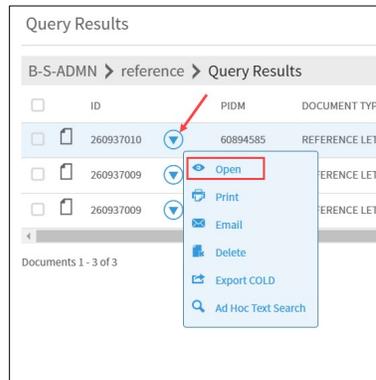| Field	Description
Document Pages	The page number(s) of the page you want to move or copy. To specify a continuous page range, insert a hyphen between the first and last page. Example: 1-4. To specify separate pages, insert a comma between each page. Example: 2,4.
Include Page Versions	Move or copy all versions of the selected pages. Note: If you move or copy multiple versions of a one-page document, AX Web Access converts the page versions to separate pages in the target application.
Target Application	The application to which you want to move or copy the pages.
Batch Name	The name of the batch.
Index New Document	Index the batch immediately after moving or copying the pages. If you do not select this option, select the batch from the Uploaded Batches list when you are ready to index the batch.

5. Click **MOVE** allows you to cut the selected pages from the source (i.e. indexed document) and paste it to the target application batch list. Note: if you want to see this document, go to Manage Batches menu.
6. Click **COPY** allows you to copy the selected pages from the source and paste it to the target application batch list.

Email

You can access the email functionality from the Query Results page or within the Document Viewer page.

1. Search for your document.
2. From the Query Results page, click to put a check beside the ID column and then select **Email**.

3. The Mail Document dialogue opens. Fill out the following information:
   a. **From:** The system will generate your email by default.
      i. **Change Email:** Enter the new email and click OK. The system will send the code to enter to your email. Here is an example.
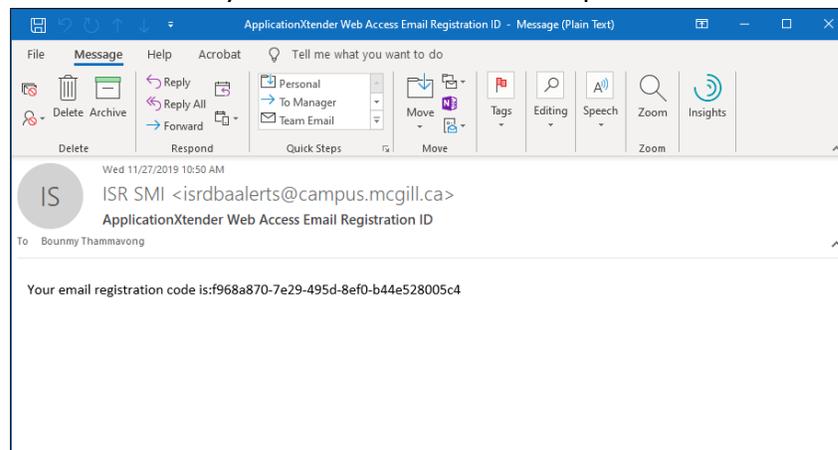
Then copy and paste the code and click OK. Then continue filling out the email information.

Mail Confirmation

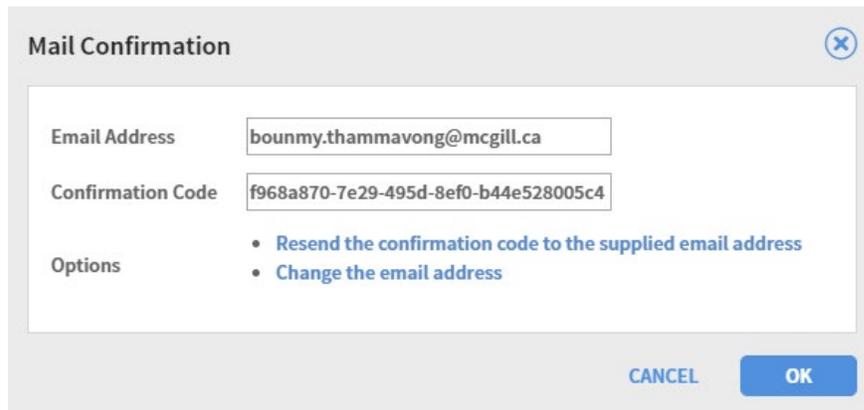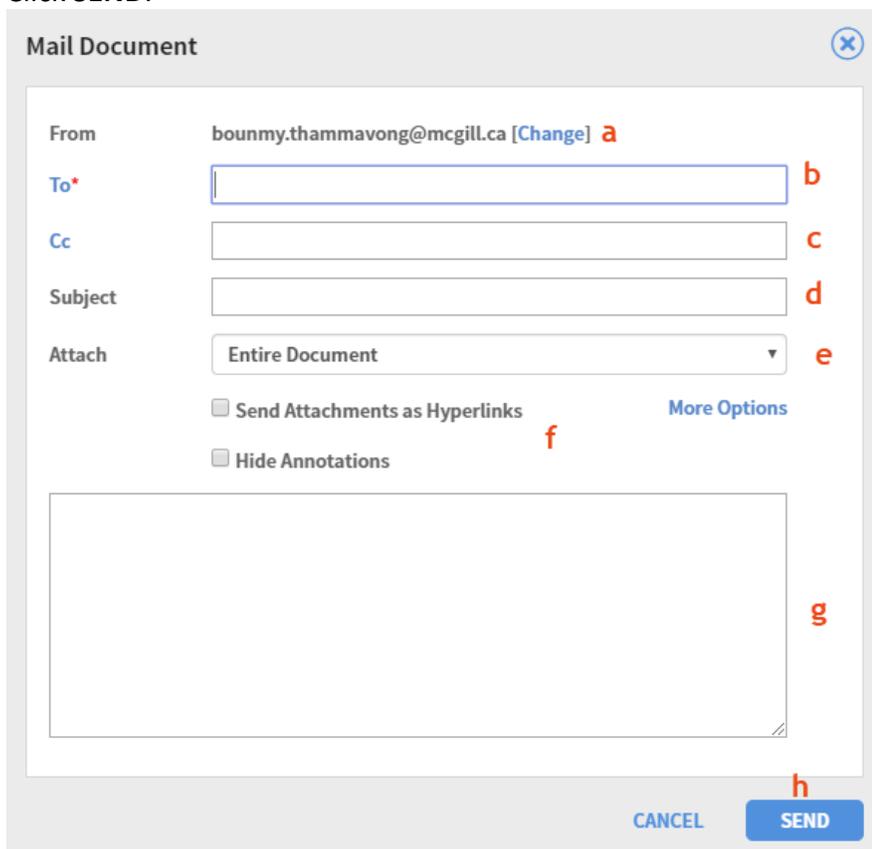|	
Email Address	bounmy.thammavong@mcgill.ca
Confirmation Code	f968a870-7e29-495d-8ef0-b44e528005c4
Options	• Resend the confirmation code to the supplied email address • Change the email address

CANCEL   OK

b. **To**: enter the main recipient's email address.
c. **CC**: enter the email address of the person you would like to send a copy to
d. **Subjec**t: Type a subject.
e. **Attach**: Select Entire Document or Page Range.
f. By default, the documents will be sent as a PDF. Optional, you can also change the other settings such as hide annotations.
g. Enter your message to the recipient.
h. Click **SEND**.

Mail Document

From   bounmy.thammavong@mcgill.ca [Change]   a
To*   b
Cc   c
Subject   d
Attach   Entire Document   ▾   e
           ☐ Send Attachments as Hyperlinks   More Options
                                               f
           ☐ Hide Annotations

                                                   g

                                                   h
                                    CANCEL   SEND

4. The system will process the email and sends the email to your recipient.
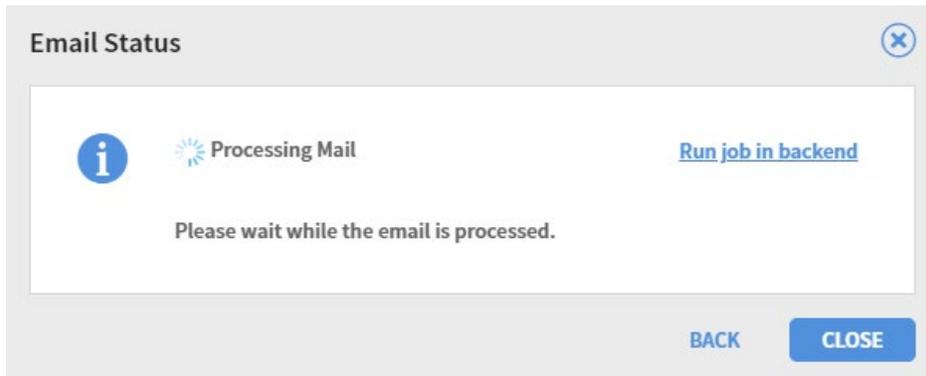
5. Click Close when you are done.

New document

In AX Web, you can create, scan and/or index new documents. This feature is useful when you have one type of document(s), and then index it to the same ID information. For example, you received a student's unofficial transcript by email and now you need to index it to that student's ID number.

How to create and import a new document

1. From the Application home page, click **New Document**.

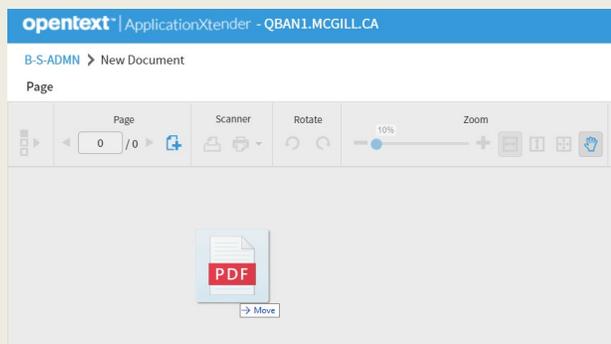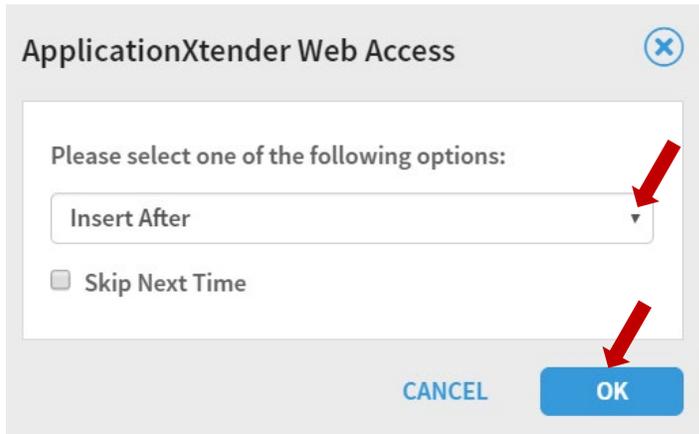2. From the New Document page,
   a. Click the **Add page** icon.

   b. Find and import your files.

> **Note** — If you are using AX Web from a direct web link, you can use the drag your files from your computer and drop your files to the batch.
>
>

3. Click the drop-down arrow to select where you would like to insert your documents, and then click **OK**.

ApplicationXtender Web Access ⊗

Please select one of the following options:

Insert After ▼

☐ Skip Next Time

CANCEL   OK

4. Your files will appear in the New Document page, and you are ready to index the new documents.

How to scan a new document

> **Note** 📎 Before using the scanning feature, please contact IT Service Desk to set up your scanner with Captiva cloud Toolkit by emailing ITsupport@mcgill.ca or calling 514-398-3398. Once your scanner is set up, you will need to Enable your scanner on page 53.

1. Turn on your scanner.
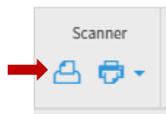2. From the Application home page, click **New Document**.

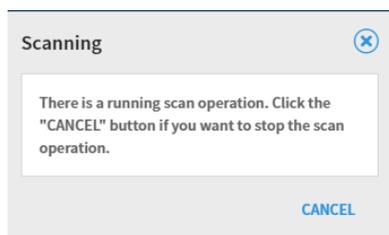[NEW QUERY] [NEW DOCUMENT] [NEW BATCH] [MANAGE BATCHES]

3. When the scanner is set up properly, you will see a **Scanner Access** message. Click **Allow** to accept the message.
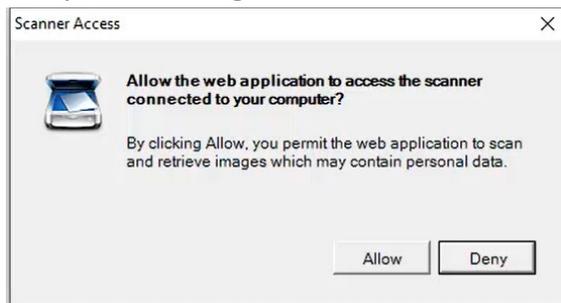
4. Wait a few minutes for the Scanner icon to appear, and then click Scanner icon to begin.

When the scanner icon is clicked, you will see the following message display:

5. Your scanned documents will appear in the New Document page and you are ready to index the documents.
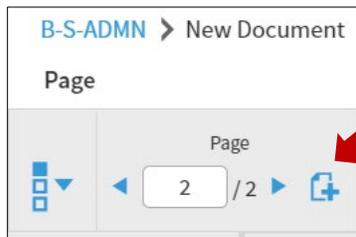
How to index a new document

Whether you just created or scanned documents, the steps for indexing new documents will be the same.

|	• When you are indexing new documents, all documents will be attached to the same ID information entered. • You will need to ask your department/unit for index criteria.
Note	

1. From the New Document page, click **Add Page** icon to begin indexing.

2. The index panel will appear on the right.
   Note: you will need to ask your department/unit for the index criteria.
   a. Fill out the index information.
   b. Click **Save**. The indexed document will be removed from the batch.
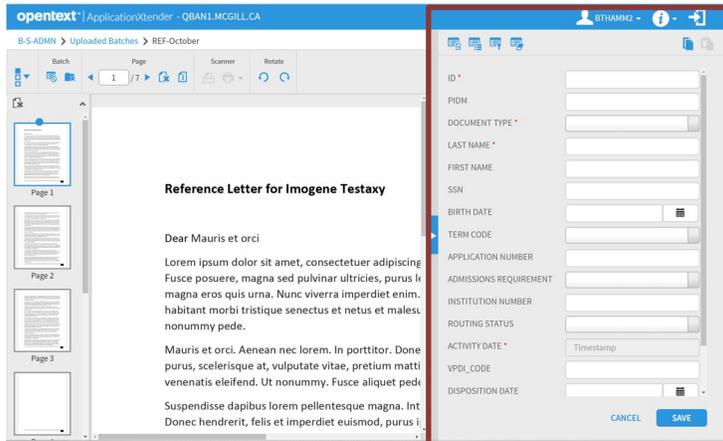
3. All indexes entered and saved will be applied to the remaining pages.

Appendix A: User Settings

AX Web has User Settings that can be customized for individual preference in processing. Most of the default values should work well for most users, but several need to be changed if, for example, you are using a scanner with AX Web.
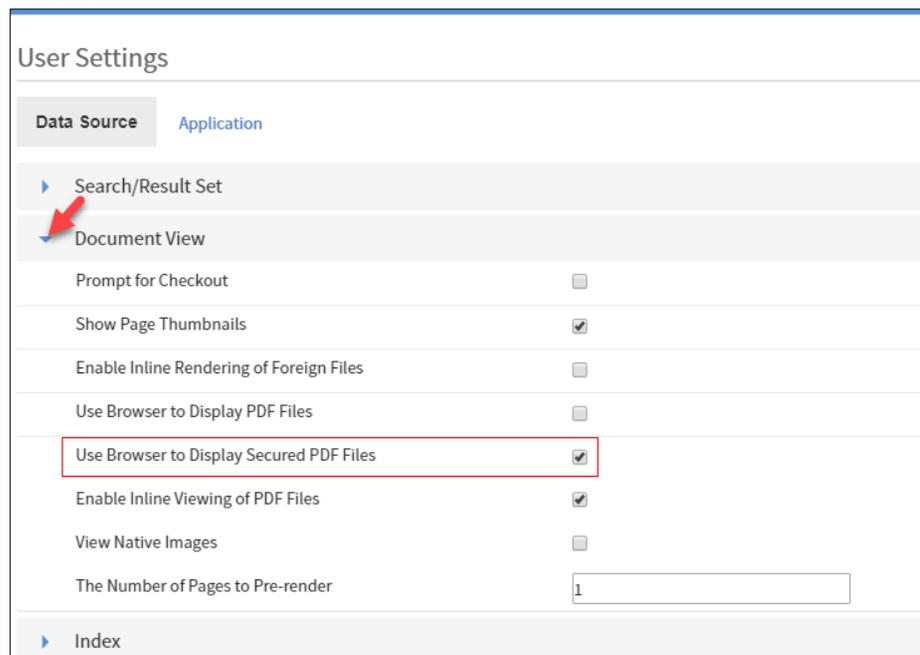
Allow to view secure documents

Many institutions are placing security on their unofficial and official transcripts. Applicants can successfully load these transcripts via Minerva document upload. The documents will be stored in AX however, you may not be able to view them in AX Web (you will receive a blank screen with a red PDF in the middle of the screen).

To view the secure PDF file, you will need to update your User Settings.

1. From the Application home page, click the drop-down arrow beside your username (located on the top-right corner) and select **User Settings**.
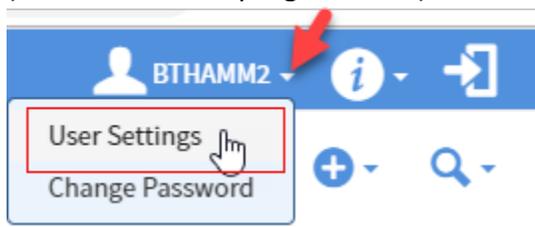
2. Click the arrow beside **Document View**, and then click to put a check on Use **Browser to Display Secured PDF Files**.
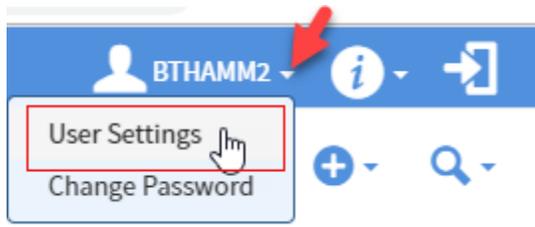

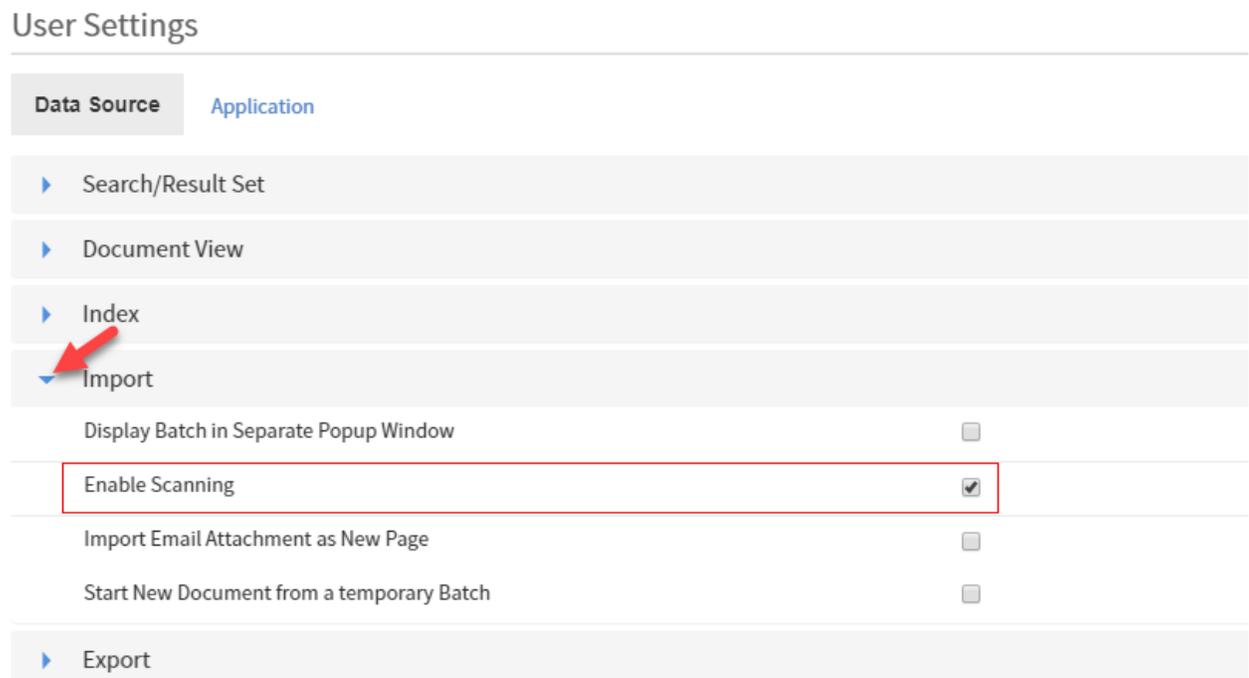3. When you are done, click **SAVE**.

Enable your scanner

Before using the scanner feature, please contact IT Service Desk to install your scanner with AX Web Access. Once your scanner is working with AX Web, you will need to set up the AX Web User Settings:

1. Click the drop-down arrow beside your username (located on the top-right corner) and select **User Settings**.

2. Click the arrow beside **Import** to expand the list, and then click to put a check on **Enable Scanning**.

3. When you are done, click **SAVE**.

Appendix B: Keyboard shortcuts

The following are keyboard shortcuts used in AX Web Access.

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+l	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