
The McGill logo consists of the word "McGill" in a red, serif font, oriented vertically.

How to use Application Xtender Document Manager

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Table of Contents

Overview	3
Scanning and indexing process	3
How to prepare your documents	4
Which software tool do you use?	4
How to configure your scanning session	5
Access AX Image Capture	5
Specify the file location to store the documents.....	5
Configure the scanner	6
How to scan a batch of documents	7
How to configure your indexing session	8
Access AX Image Capture	8
Specify the file location to store the documents.....	8
How to index documents	9
How to query documents from Banner	11
Searching for and displaying documents	11
How to retrieve documents with AX Document Manager	13
Basic queries	13
How to retrieve ‘Not on System (NOS)’ application documents	15
Importing documents with AX Document Manager	17
Importing a pdf.....	17
Adding pages to documents	18
Adding a page by importing a file	18
Adding a page by scanning	18
Error Messages	18
Reordering pages of documents	20

Overview

Imaging is the conversion of paper documents into electronic images stored on a computer. Documents are imaged using a scanner and then catalogued for quick retrieval as follows:

1. Scan documents
 - Use a scanner with Application Xtender Image Capture software to scan paper documents and convert them into electronic images stored on a computer.
2. Index documents
 - For each scanned document use ApplicationXtender Document Manager or Application Xtender Web Access to add index information for easy document retrieval.
3. Retrieve documents
 - Faculty and staff can retrieve and view specific documents with ApplicationXtender Document Manager or Application Xtender Web Access by performing queries using the appropriate index information.

Scanning and indexing process

When scanning a batch of documents

1. Prepare your documents.
2. Configure your scanning session.
3. Scan the batch of documents.
4. Configure your indexing session.
5. Index your documents.



How to prepare your documents

1. Remove all staples and paper clips. Flatten or photocopy 'dog-eared' documents.
2. Pre-sort all your documents into batches. Create batches by document type (e.g. 'transcripts', 'personal data forms', 'invoices' etc.) or any other method (by receipt date, by applicant file, etc.).
3. Before scanning, write an identifying code on each document to facilitate identifying the document when you index it later on. Write this type of information in a consistent location such as the top right hand corner of document.

For example:

- Write the applicant's McGill ID from SAAADMS on all application documents.
 - Write the Document ID from FAIINVE on all invoices.
4. You may need to stamp application documents (transcripts, test scores, etc.) 'official' or 'unofficial' prior to scanning.

Which software tool do you use?

To do this ...	Use ...
Scan batches of documents	AX Image Capture
Scan or import single documents	AX Document Manager or AXWebAccess
Index scanned documents	AX Document Manager or AXWebAccess
Retrieve documents	AX Document Manager or AXWebAccess
View documents	AX Document Manager or AXWebAccess
Annotate documents	AX Document Manager



How to configure your scanning session

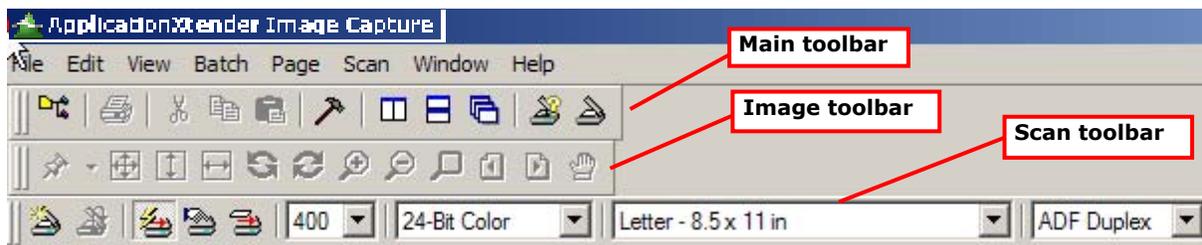
Access AX Image Capture

1. Double-click on the **AX Image Capture** icon on your desktop, or access it from the **Application Xtender Desktop** menu under the **Start > All Programs** button.
2. Enter your Banner UserID and Password and click **Login**.



If you change your Banner password, it will automatically be changed in AX Image Capture.

The scanning toolbar will appear.



Specify the file location to store the documents

1. Click on the **Application View**  icon from the main toolbar.
2. To select the application in which the images should be stored, double-click on the appropriate application.
3. Click  again to close the application view window.

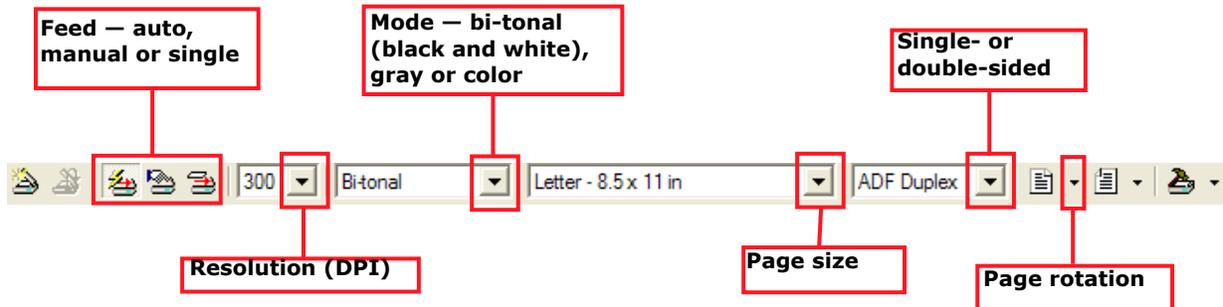


Configure the scanner

1. Click on the **Select Scanner**  icon to display a list of scanners.
2. Highlight the correct scanner and click **OK**.
3. Use the Scan toolbar to configure the scanning operations.

You can keep the same settings for the entire session or change them when you want.

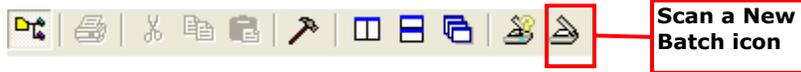
All of the operations of the Scan toolbar can also be accessed from the Scan menu.



How to scan a batch of documents

Make sure you have configured the scanner according to the instructions above.

1. Place your batch of documents in the scanner feed tray.
2. Click on the **Scan a New Batch** icon on the main toolbar.



3. Enter the name of the batch and click **OK**. The batch of documents will feed through the scanner.
4. To add more pages to the same batch, place the additional documents in the scanner and click on **Scan** from the scan toolbar.



5. When you have finished scanning the batch, close the batch by choosing **File > Close**.

If you want to ...	Then ...
Scan a new batch	Click  and repeat steps 3 to 5
View a list of all the batches that have been scanned under the same application	Choose Batch > List
Exit Image Capture	Choose File > Exit

Note

Do not click on the  in the upper right hand corner to exit Image Capture. This will lock your session and may prevent another user from logging into Image Capture.

Always choose **File > Exit**.

How to configure your indexing session

Access AX Image Capture

1. Double-click on the **AX Document Manager** icon on your desktop, or access it from the **Application Xtender Desktop** menu under the **Start > All Programs** button.



2. Enter your Banner UserID and Password and click **Login**.

If you change your Banner password, it will automatically be changed in AX Image Capture.

Specify the file location to store the documents

1. Click on the **Application View**  icon from the main toolbar.

2. To select the application in which the images should be stored, double-click on the appropriate application.

3. Click  again to close the application view window.

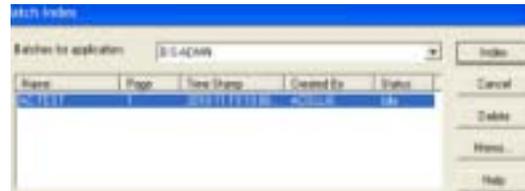


How to index documents

For each scanned document use ApplicationXtender Document Manager to add index information for easy document retrieval.

1. Choose **Utilities > Batch > Index (List)** to display the **Batch Index** window:
2. Select the batch of documents you would like to index and click on **Index** to display the first document from the batch.

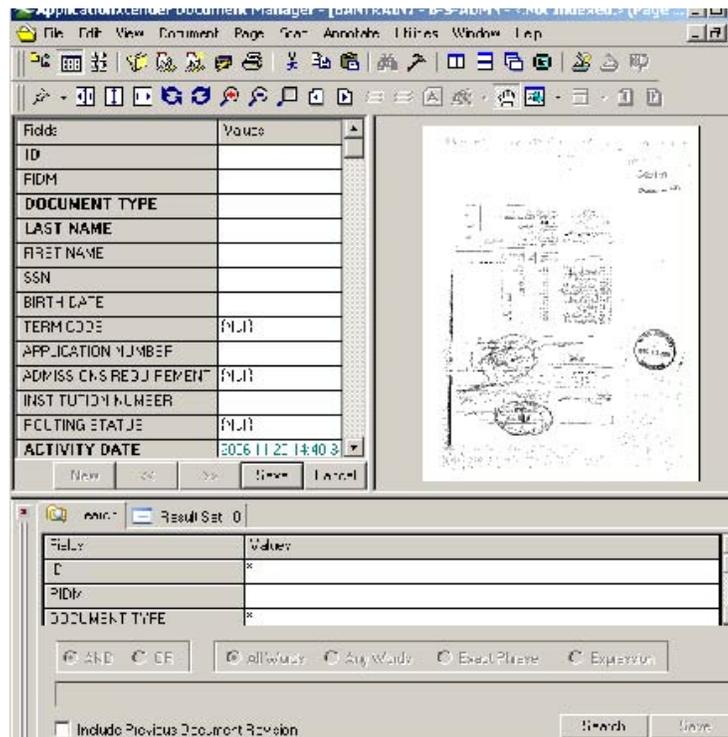
All batches of documents are accessible for indexing, not only those you have scanned. However you should not be opening batches you have not been authorized to access. The batch status must be **Idle** to open the batch for indexing.



3. Click the **New Document** icon to begin indexing.

A blank index beside your first document will appear.

New Document icon



4. Enter the first index field criteria and **<Tab>** — for applications enter the McGill ID; for invoices enter the Document Number, etc.

Fields	Values
ID	260053162
PIDM	60044867
DOCUMENT TYPE	TRANSCRIPT-OFFICIAL COLLEGE
LAST NAME	WARREN
FIRST NAME	SARAH
SSN	
BIRTH DATE	
TERM CODE	200409
APPLICATION NUMBER	2
ADMISSIONS REQUIREMENT	CGP1
INSTITUTION NUMBER	
ROUTING STATUS	{Null}
ACTIVITY DATE	2003-11-04 17:11

Fields	Values
DOCUMENT ID	I0316412
DOCUMENT TYPE	INVOICE
TRANSACTION DATE	02-MAR-2004
VENDOR ID	147004208
VENDOR NAME	PLOMBERIE ROGER CHAYER INC
FIRST NAME	
PIDM	47004208
ROUTING STATUS	{Null}
ACTIVITY DATE	2004-03-03 10:30:02

McGill ID (Student) or Document ID (Finance)

AXDocument Manager automatically populates subsequent fields with data from Banner.

- Fill in the fields that did not automatically populate and require data.
- Verify the index information against the document and click the **Save** icon located at the bottom of the index window.

The document on the right disappears but the associated indexing information remains.

If you want to ...	Then ...
Attach additional pages to the same index (i.e. if a single document has more than one page)	Click on Attach Page 
Delete a page (a blank page, for example)	Click on Delete 
Continue indexing the batch	Click on New Document and repeat steps 4 to 6 

Note

If you try to close a batch before you have indexed all the documents you will be asked "Would you like to DELETE this unindexed document?"

Click **Yes**. The document will not be deleted.



How to query documents from Banner

Banner and ApplicationXtender are connected - they 'speak' to each by sharing data and also allowing you to quickly query documents from Banner forms.

One of the quickest ways to query one or more documents is to open the appropriate Banner form, enter the criteria and launch **Xtender Solutions**.



Note

Before querying documents from Banner, you must set your XS query preferences.

Open the Banner form EXAUPRF and set your 'Default Association Between Banner and Document Manager (ApplicationXtender)/Web Access (WebXtender)' to Document Manager (ApplicationXtender).

Click Save.

Searching for and displaying documents

1. Login to Banner.
2. Open the appropriate Banner form:
 - a. To retrieve Admission Application documents, use SAAADMS or SGASTDN.
 - b. To retrieve finance invoice copies, use FAAINVE, FAIINVE or FOIDOCH.
 - c. To retrieve employee records, use NBAJOBS.
3. Enter the necessary criterion in the Key Block.

e.g. Enter the McGill ID in SGASTDN of the student whose application documents you wish to view.
4. Click on **Next Block** 
5. Click on the **BDMS Display Document** icon on the Banner toolbar. 
6. The results are displayed. An AX Document Manager session opens and one of the following will occur:
 - a. If no documents are found meeting the specified search criteria, a **No documents found** message appears.
 - b. If one match is found, DM displays that document. No query results are displayed in this case.
 - c. If more than one match is found, the **Result Set** tab appears, allowing you to select a document by double clicking on it for viewing.



Search		Result Set : 82				
	DOCUMENT TYPE	LAST NAME	FIRST NAME	TERM CODE	APPLICATION NUMBER	ACTIVITY DATE
	ADMISSIONS APPLICATION	HO	WON LING	200409	1	2003-12-08 13:31
	ADMISSIONS APPLICATION	HO	WON LING	200409	2	2003-12-08 13:31
	ADMISSIONS APPLICATION	PARK	WON JAI	200409	1	2003-12-09 15:53
	ADMISSIONS APPLICATION	HUR	WOJIN	200409	1	2003-12-11 10:09
	ADMISSIONS APPLICATION	HUR	WOJIN	200409	2	2003-12-11 10:09

7. To view subsequent pages of a multi-page document, click on the **Next Page/Previous Page**

  icons on the Image Toolbar.

8. To return to the Search Results, click on the **Search** tab or the **Query** icon. 

How to retrieve documents with AX Document Manager

A query is a search that you use to retrieve documents stored in AX Document Manager. Index information is required for every document when it is indexed. This ensures that a document can be retrieved quickly and easily by searching for information stored in the document index fields.

Basic queries

1. Click on the **New Query** icon 

The query window will open. You may need to expand the window by dragging the edges upward to see all the searchable index fields.

Fields	Values
ID	
PIDM	
DOCUMENT TYPE	*
LAST NAME	
FIRST NAME	
SSN	
BIRTH DATE	
TERM CODE	*
APPLICATION NUMBER	
ADMISSIONS REQUIREMENT	*
INSTITUTION NUMBER	

2. Enter search criteria for the query to locate the documents you want to retrieve. You can enter values in one or multiple index fields.

e.g. To search for a transcript for a specific student (McGill ID 124536241) for the admit term 200409, enter the following criterion:



Fields	Values
ID	124536241
PIDM	
DOCUMENT TYPE	TRANSCRIPT-OFFICIAL
LAST NAME	
FIRST NAME	
SSN	
BIRTH DATE	
TERM CODE	200409
APPLICATION NUMBER	
ADMISSIONS REQUIREMENT *	
INSTITUTION NUMBER	

To widen a search, use the wildcard symbol * (asterisk). e.g. Smith* would find Smithsonian as well as Smith.

- Hit **Enter** on your keyboard, or click **Search**.

One of the following will occur:

- If no documents are found meeting the specified search criteria, a **No documents found** message appears.
 - If one match is found, AX displays that document. No query results are displayed in this case.
 - If more than one match is found, the Result Set tab appears, allowing you to select a document for processing. From the Results Set, double-click on any document to view it.
- To view subsequent pages of a multi-page document, click on the **Next Page/Previous Page**   icons on the Image Toolbar.

- To return to the Search Results, click on the **Query View** icon 

If you want to ...	Then ...
To close or open the Query Results window	Click on the Query View icon 
Build on the previous query	Click on the Search tab  Search from the query Results Set window
Perform a new query	Click on the New Query icon  and repeat steps 2 to 3

How to retrieve 'Not on System (NOS)' application documents

Sometimes application documents arrive, but the applicant does not yet have a McGill ID assigned. The documents cannot be indexed to an ID and are instead temporarily indexed with a tilde symbol '~' in the ID field. You can still query and retrieve these documents by searching by name as described below.

1. Click on the **New Query** icon



The query window will open. You may need to expand the window by dragging the edges upward to see all the searchable index fields.

Fields	Values
ID	
PIDM	
DOCUMENT TYPE	*
LAST NAME	
FIRST NAME	
SSN	
BIRTH DATE	
TERM CODE	*
APPLICATION NUMBER	
ADMISSIONS REQUIREMENT	*
INSTITUTION NUMBER	

2. In the **ID** field, type in a tilde symbol '~' (located above the Tab key) and a wildcard '*' (Shift + 8).

Type in the last name in the **Last Name** field. Use the wildcard '*' to widen the search as required. e.g. Smith* would find Smithsonian as well as Smith.

Enter the first initial with a wildcard (or the full first name) in the **First Name** field. e.g. J*

Fields	Values
ID	<input type="text" value="*"/>
PIDM	
DOCUMENT TYPE	*
LAST NAME	<input type="text" value="Smith"/>
FIRST NAME	<input type="text" value="J*"/>
SSN	
BIRTH DATE	
TERM CODE	*
APPLICATION NUMBER	

AND
 OR
 All Words
 Any Words
 Exact Phrase
 Expression

3. Hit **Enter** on your keyboard, or click on

One of the following will occur:

- a. If no documents are found meeting the specified search criteria, a **No documents found** message appears.
- b. If one match is found, AX displays that document. No query results are displayed in this case.
- c. If more than one match is found, the Result Set tab appears, allowing you to select a document for processing. From the Results Set, double-click on any document to view it.



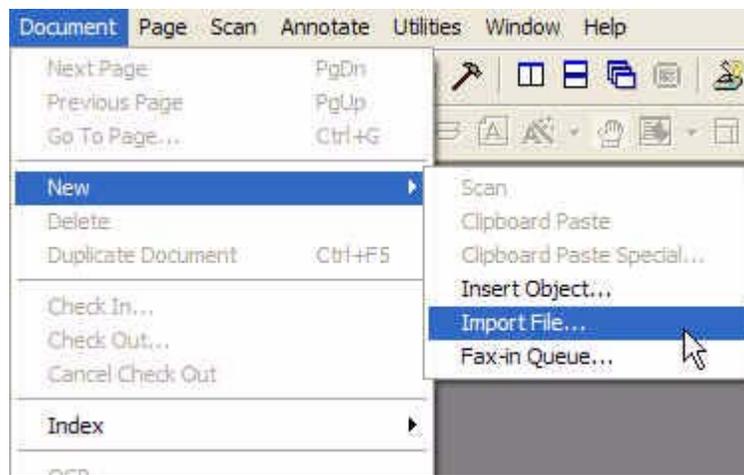
Importing documents with AX Document Manager

You can create a new document in ApplicationXtender by importing an existing file. You can import many file types into AX DM, but it is recommended that users restrict the formats to TIFF's for scanned images and PDF files for any electronically generated documents (e.g. email correspondence).

If you would like to import an E-mail from Outlook into Document Manager, it is highly recommended that you acquire Adobe's Acrobat Professional. This will install a utility in Outlook which will convert the email to pdf format. This email document can then be imported into Document Manager. For further assistance in this regard, contact the Documentation Center for student admissions.

Importing a pdf

1. From the AX menu bar, select **Document > New > Import File**.



The Import File dialog box appears, allowing the selection of the file.

2. Navigate to and select the file(s) that you want to import and click **Open**.

Document Manager will import the specified document. A message appears indicating how many of the selected files have been imported. You can cancel the import by clicking **Cancel**.

When the import is complete, the document appears in the Document Display view with a blank index beside it.

3. Enter the index information for the new document (see 'How to index documents' section).

If you are importing an e-mail in the Student Admissions App, always select the document type **Correspondence (Misc.)**

4. When you have finished entering the index information, click **Save**.
5. If you would like to re-index the same document to another index value (for example a different student application) click on at the bottom of the index column and enter the appropriate index information, then click **Save**.



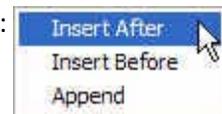
Adding pages to documents

As soon as a document has been created in Document Manager, additional pages can be attached as you require. Subsequent pages can be the same file type as the first page (a scanned page for example) or a pdf. file type. Pages can be inserted before or after the displayed page, or appended to the end of the active document.

Adding a page by importing a file

Before attaching a new page to a document, make sure that existing document is displayed. Open the existing document by performing a query following the instruction in the section “How to query documents from Banner”.

1. From the **Page** menu, select **New>Import File**. A shortcut menu appears:



You have the following choices:

- a. If you want the new page to be added as the next page in the document (after the currently displayed page), select **Insert After**.
- b. If you want the new page to be added as the previous page in the document (before the currently displayed page), select **Insert Before**.
- c. If you want the new page to be added as the last page in the document, select **Append**.

The Import File dialog box appears, allowing selection of any file.

2. Navigate to and select the file(s) that you want to import and click **Open**.

AX displays the new page in the Document Display view.

Adding a page by scanning

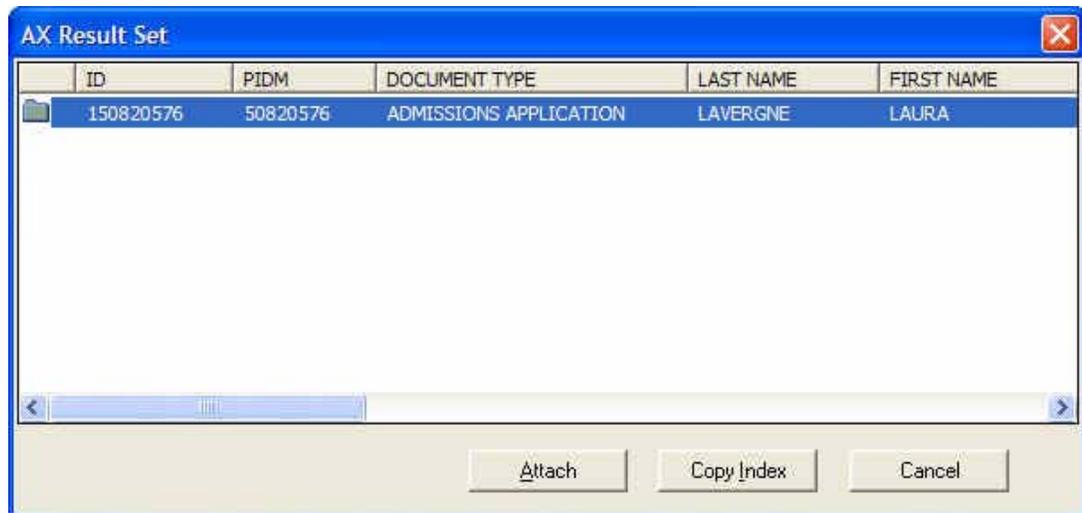
Follow the same instructions as above except in Step 1 select **New>Scan** instead of New>Import File.

Error Messages

If you receive the following error message in AX after saving the index, a document with the same index values already exists.



- Click '**OK**'. Hit **F4** to search for the existing document. A result set box will appear with the index that already exists:



- Click on **Attach**. This will attach your new document to the end of the original.

Reordering pages of documents

You can reorder the pages of a document.

1. Display the page in Document Display View.
2. Select **Page > Reorder** and then select the new page location from the shortcut menu.

