Viewing, imaging documents with AX Web Access

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How to install ApplicationXtender Web Access 6.5 components

Target audience

All Imaging users who do not have the ApplicationXtender desktop client (Document Manager) installed on their PC.

We strongly recommend that you ask your LAN Administrator to complete this procedure as you will need local administrator rights on your workstation. If you have any questions about these instructions please contact the ICS Service Desk by phone at 398-3398 or email support.ist@mcgill.ca.

Supported platforms:

- Safari 4.0 (support for Mac OS 10.6 in thin client mode only)

- Firefox 3.5 (support for Windows OS and Mac OS 10.6 in thin client mode only)

- Microsoft Internet Explorer 8.0 and 7.0 (thin client and IRC viewer modes)

Install the ActiveX controls for the IRC Viewer (Internet Explorer only)

By default, AX Web Access users have the IRC viewer setting enabled because it provides more functionality. However, several additional components have to be installed on the user's workstation and only if they are using Internet Explorer. Safari and Firefox do not support the IRC viewer or other components.

1. Add the WX server to your browser's trusted sites:

    a. Launch Internet Explorer

    b. Click on **Tools > Internet Options > Security > Trusted Sites > Sites**

    c. Add https://axweb.campus.mcgill.ca/appxtender

    d. Repeat for https://basil.campus.mcgill.ca/appxtender

2. Connect to WebXtender at:

    – https://axweb.campus.mcgill.ca/appxtender

3. Log in as follows:

    Data Source: BANNER.MCGILL.CA

    User Name: WXINSTALL

    Password: WXINSTALL

4. Double-click on the **M-G-Test** application

5. Without entering any search criterion, click the **Submit** button on the query screen.

6. From the results set open any image by clicking on the **Document Icon**.

7. You will be prompted to open a **.cab** file to install the interactive image (IRC) viewer.

8. Once the IRC viewer is installed, click on the **Application List** icon to close the image.

Install AX Web Access components

1. Under the **Help** menu select **Check Installed Components**. You will be prompted to open another .cab file to install the AX Web Access component checker.

2. Download and install ALL three components (click on the icons) if they are not already installed. Check the lower section for the current install status. If the section appears blacked out, just click in that area.

3. The current status for each of the three components should now be visible.

Password synchronization

	Only first time Imaging users **MUST** perform this step.
Note	Those who have been using the previous version of ApplicationXtender (v5.3) do not have to do this step.

All first time ApplicationXtender users must synchronize their AX and Banner passwords before they can login to any of the AX products (Document Manager, Web Access, Image Capture etc.). This can be accomplished in one of 3 ways:

- For Banner users, have the user log into Banner INB and launch ApplicationXtender by clicking on the **Banner Document Management System (BDMS) Display Document** icon from any Banner form. A message panel should pop up immediately stating: "Your BDMS password has been automatically synchronized with your Banner password. You must use your Banner password if you wish to access AX / WX directly."; click OK. The user's password is now synchronized.

- For Banner users, have the user log into Banner, go to form GUAPSWD and change their password. This also synchronizes their AX and Banner passwords but it involves changing their existing Banner password too.

- For Banner and AX-only users: Log into Minerva and go to **Personal Menu > Change your Banner/Imaging Password**. The user can keep their current Banner password or select a new one. Note: This will synchronize their Banner, AX and Banner data warehouse passwords.

How to search for and print documents

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 softw are to scan paper documents and convert them into electronic images stored on a computer.

2. Index documents

    –   For each scanned document use Application Xtender 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 Application Xtender Document Manager or Application Xtender Web Access by performing queries using the appropriate index information or by querying directly from Banner.

What you can do with AX Web Access

AX Web Access allows you to access scanned or imported documents via the Internet.

With AX Web Access, you can add, delete, view and print documents using a Web browser. Document annotations can be viewed, added, and edited. You can also create, edit, and save queries.

Minimum system requirements

The minimum system requirements for the AX Web Access are:

*   Win32 platform (Windows XP Professional [SP2], Windows 2000 [SP4] Server, Windows 2000 [SP4] Advanced Server, or Windows 2003 Server [SP1] Standard, Enterprise, and Web Edition)

*   MS Internet Explorer 6.0, which includes ActiveX support (6.01 is highly recommended) or Netscape Navigator 7.1 with Interactive Client Viewer Plug-In installed

How to search for imaged documents from Banner

One of the quickest ways to query one or more imaged documents is to enter a student's McGill ID in Banner and launch AX Web Access.

1. Perform the query

   If you are searching for student records

   a. Login to Banner.

   b. Open SGASTDN - General Student Form or SAAADMS - Student Admissions Form

   c. Enter the **McGill ID** of the student whose documents you wish to view.

      You **do not** need to enter the **Term** or click on **Next Block**.

   d. Click on the **BDMS Display Document** icon on the Banner toolbar.

   If you are searching for employee records

   a. Login to Banner.

   b. Open NBAJOBS - Employee Jobs.

   c. Enter the McGill ID of the student whose documents you wish to view.

   d. Click on the magnifying glass icon beside the **Posn** field and from the two options, select the employee's position number. Double click on the appropriate position number and it will be copied back into the **Posn** field along with the appropriate **Suffix** information.

      You do not need to enter the remaining fields or click on **Next Block**.

   e. Ensure that the cursor is positioned in the **Suffix** field.

   f. Click on the **BDMS Display Document** icon on the Banner toolbar.

2. Display the results

   An AX Web Access internet session opens and displays the Search Results of documents for the specified student.

3. View a document

– Click on the associated document icon and a new window will open and the document is displayed.

– To view subsequent pages of the document, click on the **Next Page/Previous Page** icons on the Image Toolbar.

– To return to the Search Results, close the document view window.

Tip	In AX Web Access, you can open and view multiple documents simultaneously. On the query result set page, click the document icon for the first document you want to open. The document appears in a Document Display window. Return to the results page and select the second document you want to open. This document appears in another Document Display window. Continue for each of the remaining documents you want to open. When you finish, each document you opened appears in its own Document Display window.

If you want to ...	Then ...
View another document from the same Search Results	Click on the associated document icon from the Search Results
Print any of the documents from the search results	Follow the instructions in the section "How to Print Documents with AX Web Access"
View the application documents for a different student	Return to Banner and repeat the steps listed above
Exit AX Web Access	**Do not** click on the in the upper right hand corner. Instead click on the Logout icon

How to use the AX Web Access image toolbar

When you open a document, the **AX Web Access image toolbar** will appear. The Image Toolbar allows you to navigate, zoom, print, configure display properties, refresh, view image information, size the displayed document, and navigate through subpages of a document.

Toolbar functions

To fit the displayed page in the document view according to height, width, or maximum height and width, use the **Page Fit** icons.

To rotate the displayed page 90 degrees to the left or right, use the **Page Rotate** icons.

To zoom in or out on the displayed page, use the **Page Zoom** icons.

The Magnifier feature allows you to pinpoint an area of an image to zoom. When the **Magnifier** icon is selected, the mouse pointer becomes a magnifier, and a click of the mouse displays the selected document region.

To page through the document, use the **Page Selection** icons. The Page Select icon allows you to specify a page to view. The **Previous Page/Next Page** icons display either the previous or the next page within a document. Note: these icons are only visible if a document has more than one page.

To switch between pan mode and selection mode, click on the **Hand** icon:

Hand icon

To print the displayed page or document, click on the Print Page or Print Document icon. For more detailed instructions on printing documents see "How to print documents with AX Web Access".

Print Page/Document icons

To refresh the document page frame, use the **Refresh** icon.

Refresh icon

How to print documents with AX Web Access

The easiest way to print documents with WebXtender is directly from the Search Results list.

1. From your Search Results, check the boxes of the documents you would like to print, then click on the **Print** icon.

2. The **Print** dialog box will appear. Select the printer from the drop-down menu, then enter the number of copies you would like to print.

3. Click OK.

    You may alternatively print an individual page or document from the document view by

    clicking on the **Print Page** or **Print Document/PDF** icons on the Image Toolbar.

4. Click on **Cancel** to return to the document.