

How to scan, index, query and retrieve documents using Application Xtender

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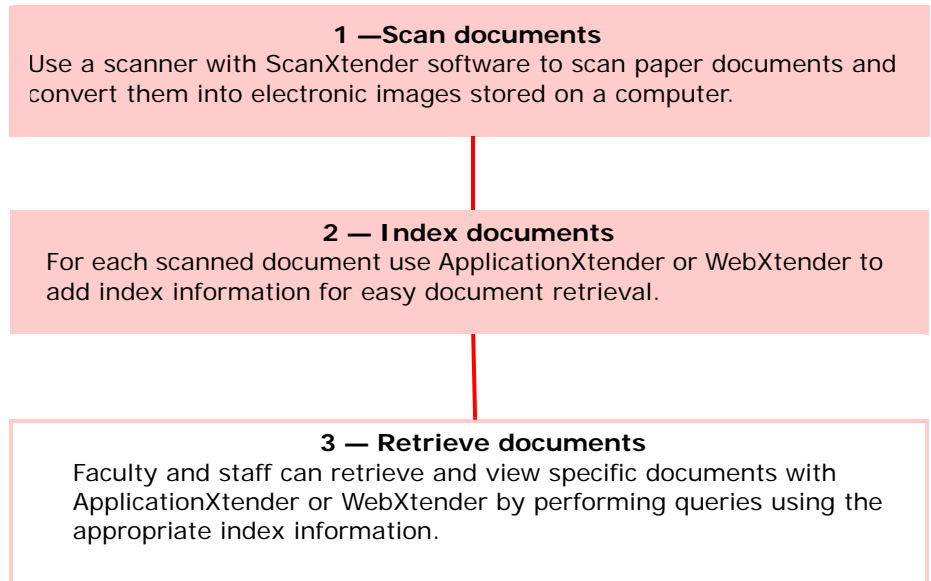
How to scan, index, query and retrieve documents using Application Xtender



Overview

From paper documents to electronic images

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:

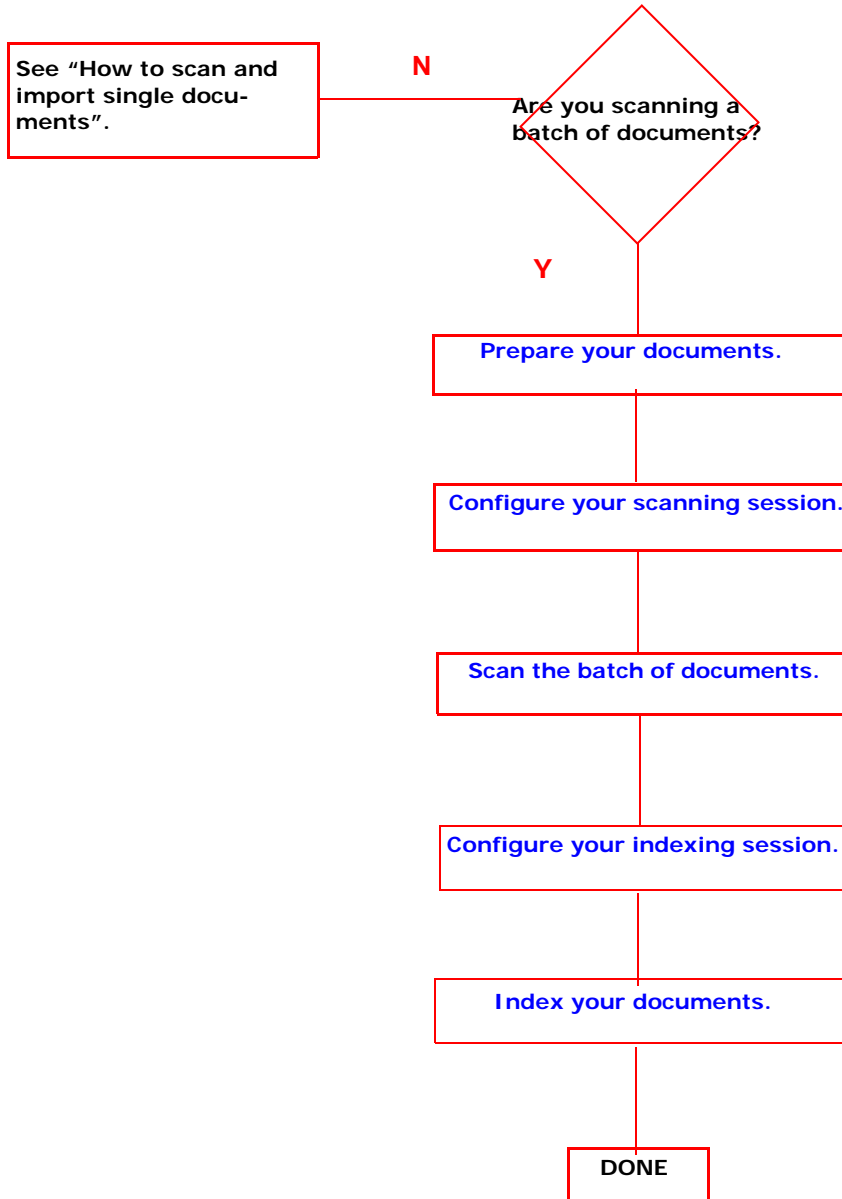


This document will provide procedures on how to perform the scanning and indexing portions of this process.



Scanning and indexing process

In Acrobat, click any [blue](#) text to go to the corresponding procedure.





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?

Here is a summary of the appropriate software to use depending on the task:

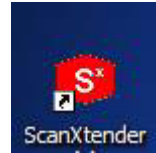
To do this ...	Use ...
Scan batches of documents	ScanXtender
Scan or import single documents	ApplicationXtender or WebXtender
Index scanned documents	ApplicationXtender or WebXtender
Retrieve documents	Banner, ApplicationXtender or WebXtender
View documents	ApplicationXtender or WebXtender
Annotate documents	ApplicationXtender or WebXtender



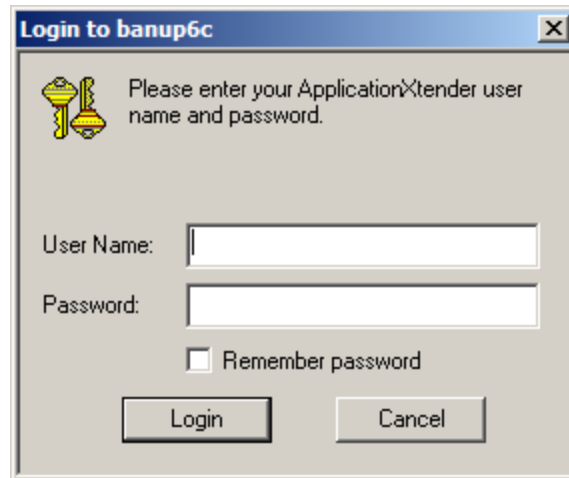
How to configure your scanning session

Access ScanXtender

- 1 Double-click on the **ScanXtender** icon on your desktop.



The following window will appear:



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

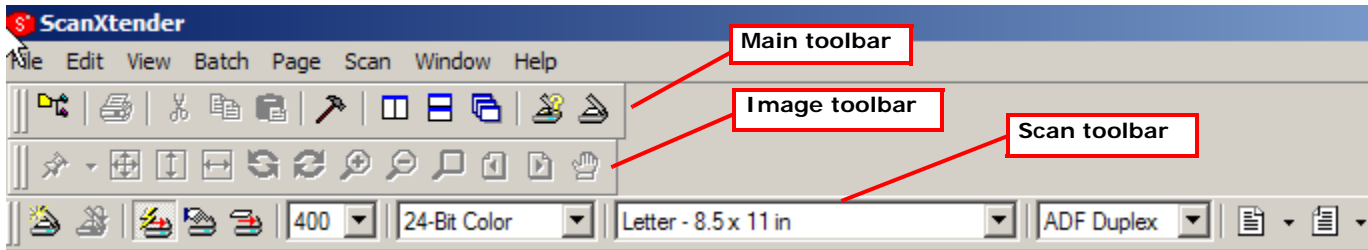
Note

If you change your Banner password, it will automatically be changed in ScanXtender.

How to configure your scanning session

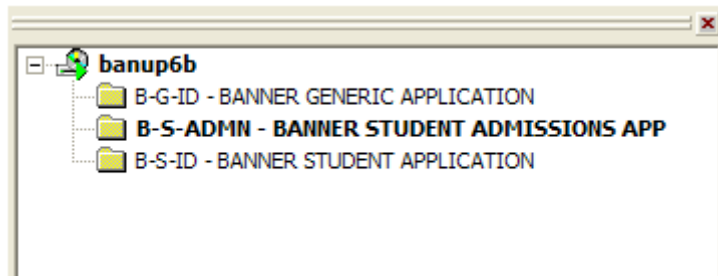



The scanning toolbars will appear:



Specify the file location to store the documents

- 3 Click on the **Application View**  icon from the main toolbar. The application view window appears:

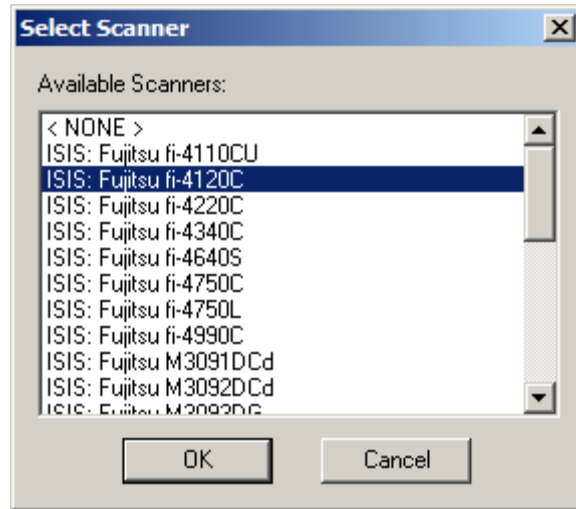


- 4 To select the application in which the images should be stored, double-click on the appropriate application.
- 5 Click  again to close the application view window.

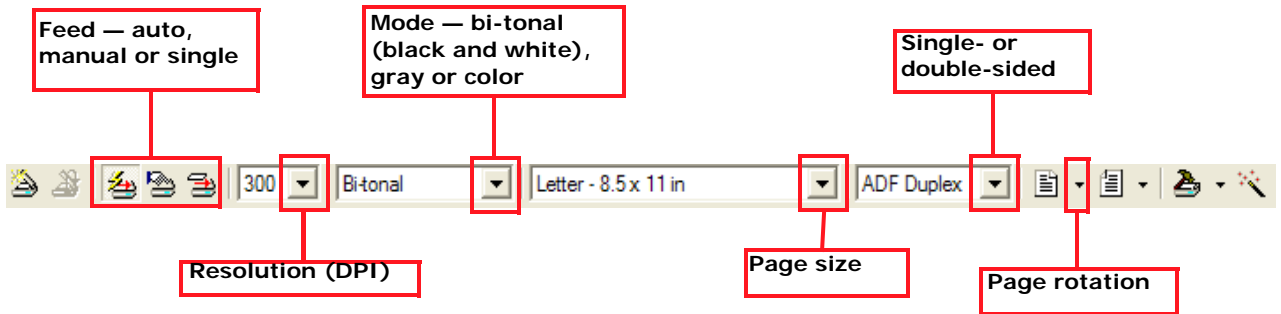


Configure the scanner

- Click on the **Select Scanner**  icon to display a list of scanners.



- Highlight the correct scanner and click **OK**.
- 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



How to scan a batch of documents

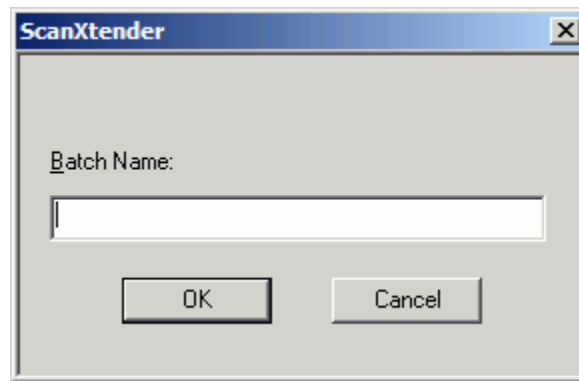
Note

Make sure you have configured the scanner according to the instructions in the section [“How to configure your scanning session”](#) on page 5.

- 1 Place your batch of documents in the scanner feed tray, face up or face down depending on the scanner.
- 2 Click on the **Scan a New Batch** icon on the main toolbar.



The following window will appear: .



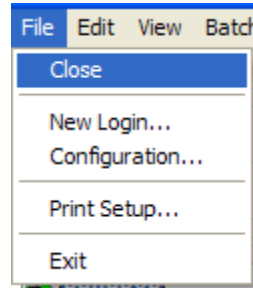
- 3 Enter the name of the batch and click **OK**. The batch of documents will feed through the scanner
- 4 To add more pages to the same batch, place the additional documents in the scanner and click on **Scan** from the scan toolbar.




How to scan a batch of documents




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



6

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 ScanXtender	Choose File > Exit



Do not click on the  in the upper right hand corner to exit ScanXtender. This will lock your ID and prevent you from logging into ScanXtender again.

Always choose **File > Exit**.

Scanning	✓
What's next?	
Indexing	
Querying	
Importing documents	
Adding pages to documents	
Importing docs when using Banner	



How to configure your indexing session

Access ApplicationXtender

- 1 Double-click on the **ApplicationXtender** icon on your desktop.



The following window will appear:



- 2 The Logon Type must be set at **AX**. Enter your Banner UserID and Password and click **Login**.

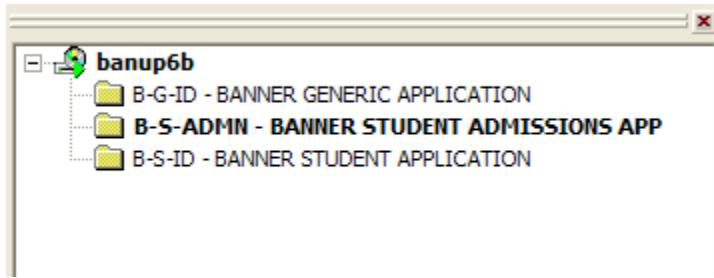



If you change your Banner password, it will automatically be changed in ApplicationXtender.



Specify the file location to store the documents

- 3 Click on the **Application View**  icon to display the application window.



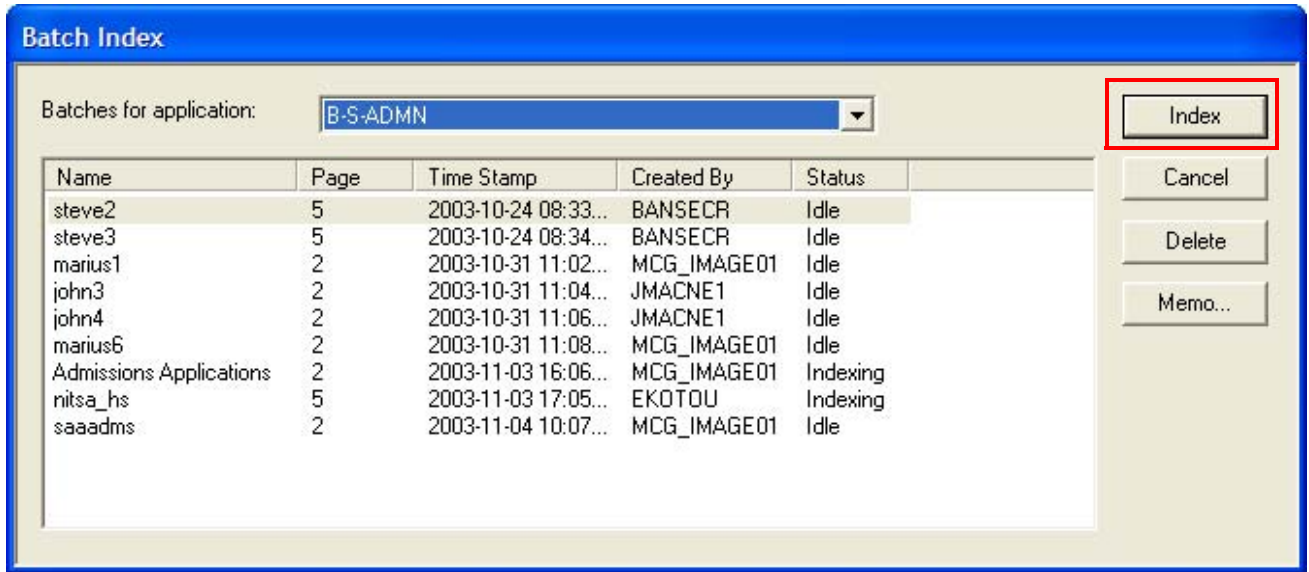
- 4 To select the application in which the images should be stored, double-click on the appropriate application.
- 5 Click  again to close the application view window.



How to index documents

For each scanned document use ApplicationXtender 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.



You can index any batch of documents, not only those you have scanned. The batch status must be Idle to open the batch for indexing.

How to index documents



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

New Document icon



A blank index beside your first document will appear:

ApplicationXtender - [banup6c - B-F-DOCS - No current document, page 3 of 3 in the batch "Clerk A"]

File Edit View Document Page Scan Annotate Utilities Window Help

Fields	Values
DOCUMENT ID	
DOCUMENT TYPE	
TRANSACTION DATE	
VENDOR ID	
VENDOR NAME	
FIRST NAME	
PIDM	
ROUTING STATUS	{Null}
ACTIVITY DATE	2004-03-23 13:07:10

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H3A 2B3

How to index documents




- 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

Fields	Values
DOCUMENT ID	10316412
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)

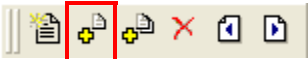
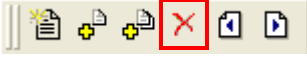

ApplicationXtender automatically populates subsequent fields with data from Banner.

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

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

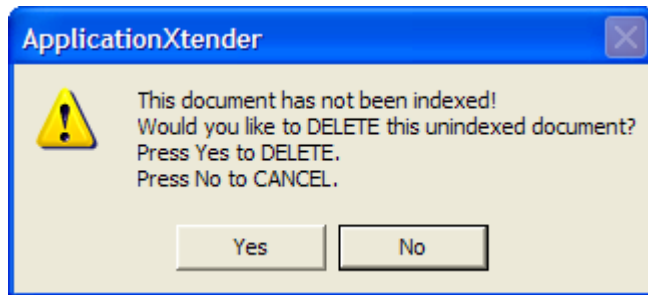


7

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. 




If you try to close a batch before you have indexed all the documents the following message appears:



Ignore this message and click **Yes**. The document will not be deleted.



Do not click on the  in the upper right hand corner to exit ApplicationXtender. This will lock your ID and prevent you from logging into ApplicationXtender again.

Always choose **File > Exit**.

Scanning	✓
Indexing	✓
What's next?	
Querying	
Importing documents	
Adding pages to documents	
Importing docs when using Banner	



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 ApplicationXtender.



Before querying documents from Banner, you must set your AX query preferences. Open the Banner form EXAUPRF and set your 'Default Association Between Banner and ApplicationXtender/WebXtender' to **Application-Xtender**. Click **Save**.

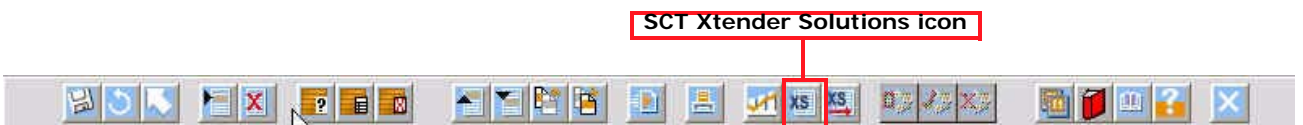
Performing the query

- 1 Login to Banner.
- 1 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.
- 2 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.



- 3 Click on **Next Block** 
- 4 Click on the **SCT Banner Xtender Solutions** icon on the Banner toolbar.





Displaying the results

An ApplicationXtender session opens and one of the following will occur:

- c If no documents are found meeting the specified search criteria, a **No documents found** message appears.
- d If one match is found, AX displays that document. No query results are displayed in this case.
- e If more than one match is found, the Result Set tab appears, allowing you to select a document for processing.

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 13:31:44
	ADMISSIONS APPLICATION	HO	WON LING	200409	2	2003-12-08 13:31:44
	ADMISSIONS APPLICATION	PARK	WON JAI	200409	1	2003-12-09 15:53:57
	ADMISSIONS APPLICATION	HUR	WOOJIN	200409	1	2003-12-11 10:09:47
	ADMISSIONS APPLICATION	HUR	WOOJIN	200409	2	2003-12-11 10:09:47

- f From the Results Set, double-click on any document to view it.
- 5 To view subsequent pages of a multi-page document, click on the **Next Page/Previous Page** icons on the Image Toolbar.
- 6 To return to the Search Results, click on the **Query View** icon

If you want to ...	Then ...
View the application documents for a different student	Return to Banner and repeat steps 2 to 5
Exit ApplicationXtender	Do not click on the in the upper right hand corner. Always choose File > Exit .

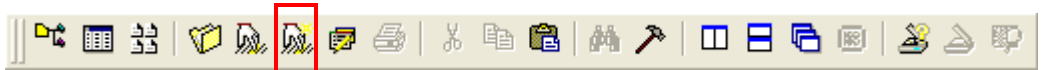


How to retrieve documents with Application Xtender

A query is a search that you use to retrieve documents stored in Application Xtender. Index information is required for every document when they are 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	

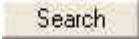


- 2 Enter search criteria for the query to locate the documents you want to retrieve. You can enter values in one or multiple index fields.
e.g. To search for a transcript for a specific student (McGill ID 124536241) for the admit term 200409, enter the following criterion:






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*

- 3 Hit **Enter** on your keyboard, or click on  **Search**
One of the following will occur:
 - g If no documents are found meeting the specified search criteria, a **No documents found** message appears.
 - h If one match is found, AX displays that document. No query results are displayed in this case.
 - i 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.
- 4 To view subsequent pages of a multi-page document, click on the **Next Page/Previous Page**  icons on the Image Toolbar.
- 5 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

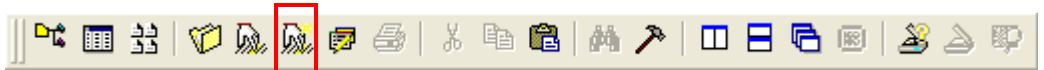
How to retrieve 'Not on System (NOS)' application documents



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 tilda 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 tilda symbol '~' (located above the Tab key) and a wildcard '*' (Shift + 8).

Type in the last name in the **Last Name** field. Use the wildcard '*' as required. e.g. Smith*

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

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



Fields	Values
ID	xxx ←
PIDM	
DOCUMENT TYPE	*
LAST NAME	Smith ←
FIRST NAME	J* ←
SSN	
BIRTH DATE	
TERM CODE	*
APPLICATION NUMBER	

AND OR All Words AnyWords Exact Phrase Expression



To widen a search, always use the wildcard symbol * (asterisk).

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

One of the following will occur:

- j If no documents are found meeting the specified search criteria, a **No documents found** message appears.
- k If one match is found, AX displays that document. No query results are displayed in this case.
- l 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.

Scanning	✓
Indexing	✓
Querying	✓
What's next?	
Importing documents	
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Importing docs when using Banner	



Importing documents with Application Xtender

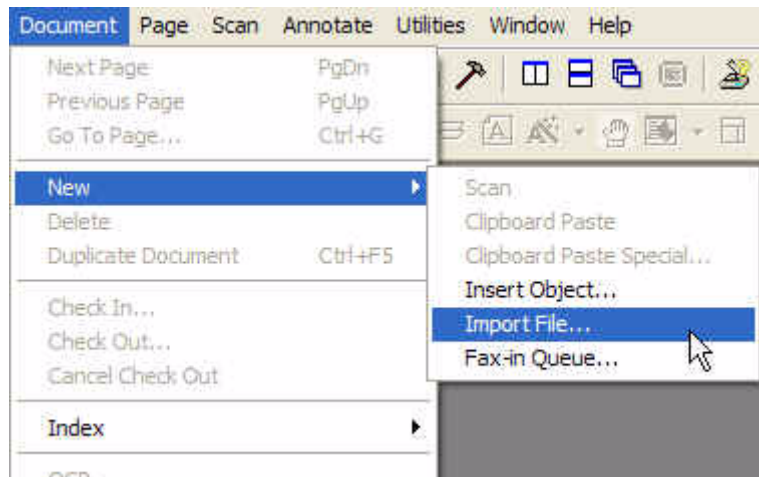
You can create a new document in ApplicationXtender by importing an existing file. You can import any file type into AX- a MS Word document, an Outlook e-mail, an Excel spreadsheet, etc.

Note

If you would like to import an E-mail from Outlook into ApplicationXtender, you must save the mail to a folder on your computer first. To save an E-mail, open the message in Outlook, then choose **File>Save As**. Navigate to your folder for storing e-mails. The **Save as Type** should be set to HTML. Click **Save**.

To add a new document by importing a file:

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



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

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

ApplicationXtender 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**.

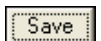
When the import is complete, the document appears in the Document Display view with a blank index beside it.

- 3 Enter the index information for the new document following the instructions on [page 14](#).

Note

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



Importing documents with Application Xtender



- 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.
- 6 Click

Scanning	✓
Indexing	✓
Querying	✓
Importing documents	✓
What's next?	
Adding pages to documents	
Importing docs when using Banner	



Adding pages to documents

As soon as a document has been created in AX, 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 any other file type. Pages can be inserted before or after the displayed page, or appended to the end of the active document.

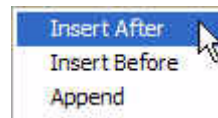
Adding a page by importing a file

Note

To add 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” on page 16](#)

- 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 2 select **New>Scan** instead of New>Import File.



Importing documents directly from Banner


When you are working in Banner, you can easily import a document into ApplicationXtender. The BXS-Add Document icon on the Banner toolbar permits you to import a document and automatically populate the index fields.



Adding a page by importing a file




Note

Before bringing new documents into AX from Banner, you must set your AX preferences in Banner. Open the Banner form EXAUPRF and set your 'Default Source for New Document/Page' to **Import File**. Click **Save**.

- 1 Open the Banner form that contains the information you need to populate your AX index. For example, for Student Applications, go to SAAAMDS and enter the Student ID; for Invoices go to FAAINVE and enter the Document ID.
- 2 Click on the BXS-Add Document Icon 
The Import File dialog box appears, allowing selection of any file.
- 3 Navigate to and select the file(s) that you want to import and click **Open**.

Tip

If you would like to import an E-mail from Outlook into ApplicationXtender, you must save the mail to a folder on your computer first. To save an E-mail, open the message in Outlook, then choose **File>Save As**. Navigate to your folder for storing e-mails. The **Save as Type** should be set to HTML. Click **Save**.

- 4 ApplicationXtender will import the specified document. A message appears indicating how many of the selected files have been imported.
When the import is complete, the document appears in the Document Display view. The index is pre-populated from the data in Banner.
- 5 Fill in the index fields that did not automatically populate and require data.
- 6 Verify the index information against the document and click the  icon located at the bottom of the index window.
- 7 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. Click .

Importing documents directly from Banner

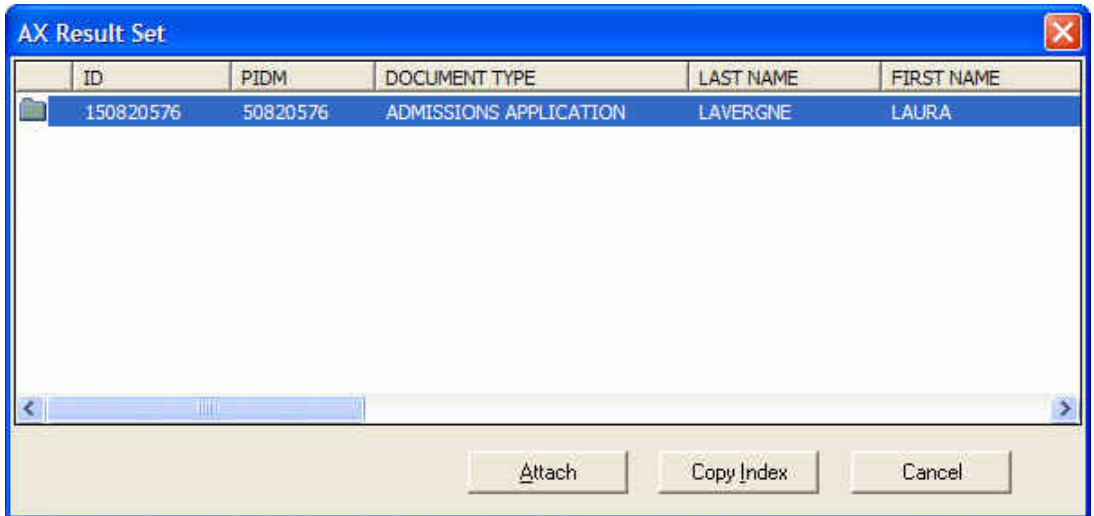


Error Messages

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



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



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

Scanning	✓
Indexing	✓
Querying	✓
Importing documents	✓
Adding pages to documents	✓
Importing docs when using Banner	✓