



MCGILL'S IMAGING SYSTEM

HRIS 131 – Retrieving & Viewing Documents

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RETRIEVING & VIEWING DOCUMENTS IN WEBXTENDER HRIS 131



About this course

This two-part course is delivered by an ICS instructor in a classroom.

The course handbook contains the following materials:

- Course Powerpoint presentation (for additional note taking)
-
- Exercises (pages xx-xx in Handbook)

If any of these items are missing, please advise your instructor or contact **Shirley Knight** at **398-4610**.

Conventions used in this document

If you are using this document in an online format (i.e. acrobat pdf.) you will find that the document uses some colour to indicate additional functionality. Text in blue will link you to web pages or other documents, provided you are connected to the internet. Otherwise the links will not be active. Red is used in some instances to highlight distinctions it does not function as a link.

Where screen captures from Banner or WebXtender are used, colours follow the usage within their format. The links in the graphics, however, will not be active within this document.

If you are using this document in a printed format, most web references include the URL so you may manually access the links through your browser.

The use of boldface type is restricted to names of buttons, links, field names and menu items or paths.



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Powerpoint presentation (in class)

Retrieving & Viewing documents in
WebXtender
HRIS 131

Instructor: Dan O'Connell

Agenda

- Introduction to Imaging
- Retrieval
 - Accessing documents from WebXtender
 - Accessing documents from Banner
- Support Resources



Imaging Introduction

What is Imaging?

- Document 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.
- Some documents originate as electronic files and they too can be incorporated into the system. (I.e. email correspondence, transcripts, etc.)



Imaging Introduction

Why use Imaging?

- Imaging eliminates filing cabinets and allows users to quickly view documents from their own workstation.
- Documents can be retrieved within seconds.
- Documents can easily be shared with other users.
- Users can view the same documents simultaneously.
- Access to documents can be controlled.

Imaging Process

5 Step Imaging Process



1. Prepare
2. Sort
3. Scan
4. Index
5. Retrieve

Imaging Components

Imaging has three principal components:

- Scanning and importing tools to bring documents into the system
- Indexing system for cataloguing the documents
- Retrieval tools for finding the documents



Storage & Indexing

- Imaged documents are stored in an “application” with index (catalogue) information so that they may be located and retrieved using queries.
- Each application has its own set of index values.
- The HRIS uses 3 different storage applications:
 - B-H-ID - documents related to individuals.
 - B-H-EMPL - documents related to an individual in a post.
 - B-H-POSN - documents related to a position.
- Most users will only have access to one of these applications.

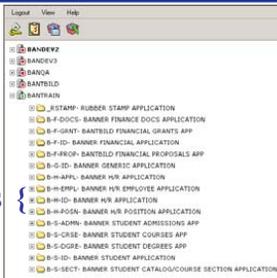
Storage & Indexing (cont'd)

- Documents, in this instance, refer to the collection of digital images that may or may not have originated as a paper document.
- Each document has its own unique index. Two documents can not have an identical index.
- A document can have multiple pages.
- Each page in a collection has the same index and document type yet they are not necessarily the same sort of document. (Eg. Tax forms & Direct deposit forms; birth certificate & citizenship documents).
- Documents can be in a various formats (I.e. tiff; pdf;), but only these two are currently recommended.

View of Applications in WebXtender (WX)

Training Instance

HRIS





View of Applications in WebXtender (WX)

Production Instance

View of Query Fields for B-H-EMPL

Each application has a unique set of query able fields based on the application's index values.

Logging Off from WebXtender

******Very Important******

- To log off properly, click on **Logout->Logout** from the toolbar menu at the top of the screen. Then exit from the WX login window by selecting the cancel option.
- Do not exit by clicking on the "X" in the upper right hand corner or just closing the browser window as this will cause an illegitimate session conclusion and tie up one of the licenses.



Exercise 1 - Accessing WebXtender

1. From your desktop, select the WX shortcut.
URL: <https://imgback.banner.mcgill.ca/wx>
2. Log on to WebX using bankk## as the user ID, and the passcode provided for the day.
3. Access the appropriate application by selecting **Bantrain**; then right click the application B-H-EMPL and choose "New Query".
4. Exit the application using the only approved method, **Logout** or selecting the 'key' icon on the left.

Querying & Retrieving

Querying / Retrieving

- WebXtender can be accessed directly via the internet at: <https://imgback.banner.mcgill.ca/wx>
- However, queries are typically initiated from specific Banner forms, using pre-specified search criteria and calling WX to retrieve and present the results.
- Accessing WX directly will still only display the application(s) the user is authorized to see.



Querying

For our purposes, all queries will be initiated from Banner. How?

- Search the required form in Banner, and then link to WebXtender via the XS toolbar icon.
- When linking to WX from Banner, we do not have to log in to WX. This is performed automatically.

Banner Document Query

- By clicking on the XtenderSolutions icon while using Banner forms, you will retrieve all the documents associated with the form and/or the specific field.



- The documents that are retrieved are based on form specific, and sometimes field specific, pre-defined context rules.
- When your user ID and workstation are properly configured, the XS icon always opens an XS window but not all banner forms are programmed with queries.

Querying & Retrieving from HRIS Applications



Query from NBAJOBS Suffix field

Note that the cursor must be in the suffix field in order to transmit the appropriate data to WX.

Click XS icon to access WX

Result of query from NBAJOBS Suffix field

ID	FIDM	DOCUMENT_TYPE	LAST_NAME	FIRST NAME
260000500	60000991	APPOINTMENTS AND CONTRACTS	CABALLERO	NEIL

Click on document icon to view page(s).

Document view of query from NBAJOBS



WX ToolBar

Close Document

View Index

Next/Previous Page of Document

Fit Document In Window

Localized Magnification

Zoom In/Out

Rotate Image

Next/Previous Sub-page of Document (if available)

Sample .pdf Document Display

Pages & Sub-pages.

Note the two sets of page advance arrows and the page and sub-page indicators at the bottom.

Closing a document

To close a document, select the red 'X'



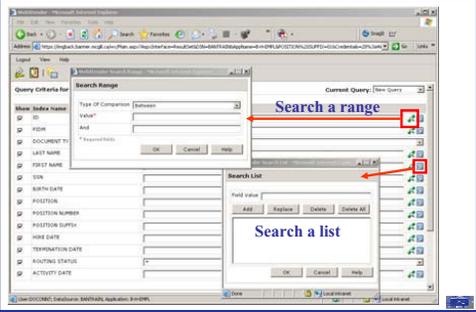
Exercise 2 (HRIS) Querying from NBAJOBS

1. What department has Mr. James Edwards been hired to?
2. Is Mr. Neil Caballero's appointment academic or administrative? Which department has hired him?
3. How many pages of correspondence are imaged for Candice Beals in her current position?

Query from WebX

4. How many student appointments are there?

Additional Querying Options in WebX



Imaged Document Types

Currently, McGill's imaging system accepts two types of imaged documents:

- TIFF (Tag Image File Format) Scanned images
 - PDF (Portable Document Format) Acrobat files
- Scanned images (tiff) display as individual pages.
• PDF files display as single pages with sub-pages for the pages within the document.

Other document types can be entered in the system, but because of issues surrounding permanence of digital format types only these two formats are currently accepted.



Logging Off from WebXtender

******Very Important******

- To log off properly, click on **Logout>Logout** from the toolbar menu at the top of the screen. Then exit from the WX login window by selecting the cancel option.
- Do not exit by clicking on the “X” in the upper right hand corner or just closing the browser window as this will cause an illegitimate session conclusion and tie up one of the licenses.

Banner Support

- **How To documents and step-by-steps**
<http://www.mcgill.ca/inb/resources/>
 - Under **Imaging** section: **How to use WebXtender for HR personnel** <http://www.is.mcgill.ca/whelp/howto/getpdf.htm>
- **Banner for administrative staff website:**
<http://www.mcgill.ca/inb>

Customer Support

- ICS Customer Support:
 - Tel: 398-3398
 - Email: support.ist@mcgill.ca
 - Web: www.mcgill.ca/ics



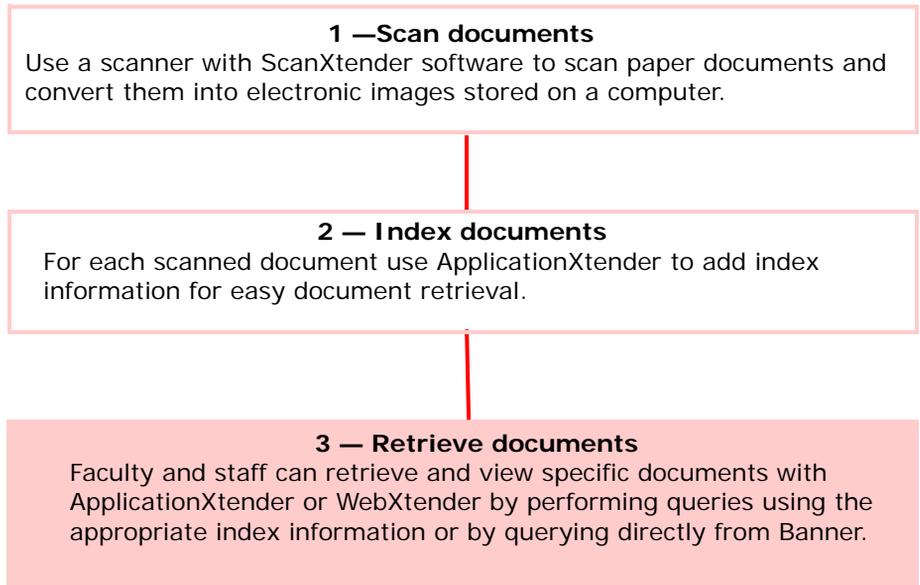


How to query and print documents



From paper documents to electronic images

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



This document will provide procedures on how to query documents directly from Banner as well as how to view and print documents with WebXtender.



What you can do with WebXtender

WebXtender allows you to access scanned or imported documents via the Internet.

With WebXtender, you can view, print and e-mail documents using a Web browser. Document annotations can be viewed. You can also create, edit, and save queries.

This document will provide procedures on how to query documents directly from Banner as well as how to view, print and e-mail the documents with WebXtender.

Minimum System Requirements

The minimum system requirements for WebXtender are:

- Windows platform (98SE, Windows ME (Millennium Edition), Windows XP Professional, Windows NT Server 4.0, Windows NT Workstation 4.0, Windows 2000 Professional, Windows 2000 Server, or Windows 2000 Advanced Server)
- Connection to the Internet
- MS Internet Explorer 5.0 - 6.01 (Internet Explorer 6.01 is highly recommended)

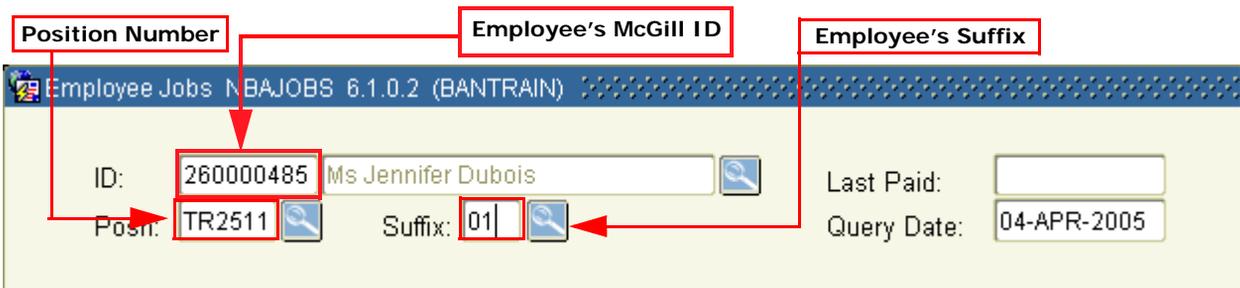


How to query documents from Banner

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

Performing the query

- 1 Login to Banner.
- 1 Open **NBAJOBS - Employee Jobs**.
- 2 Enter the **McGill ID** of the student whose documents you wish to view.
- 3 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..



Note

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

- 4 Ensure that the cursor is positioned in the **Suffix** field.
- 5 Click on the **SCT Banner Xtender Solutions** icon on the Banner toolbar.

SCT Xtender Solutions icon



How to query and print documents



Displaying the results

A WebXtender internet session opens and displays the **Search Results** of documents for the specified student:

Logout View Help

Query Results for Application 'B-H-EMPL'

Document 1 - 2 of 2

<input type="checkbox"/>	ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE	POSITION	POSITION
<input type="checkbox"/>	 260000485	60000966	CORRESPONDENCE	DUBOIS	JENNIFER				TR2511
<input type="checkbox"/>	 260000485	60000966	APPOINTMENTS AND CONTRACTS	DUBOIS	JENNIFER				TR2511

6 To view a document, click on the associated document icon.

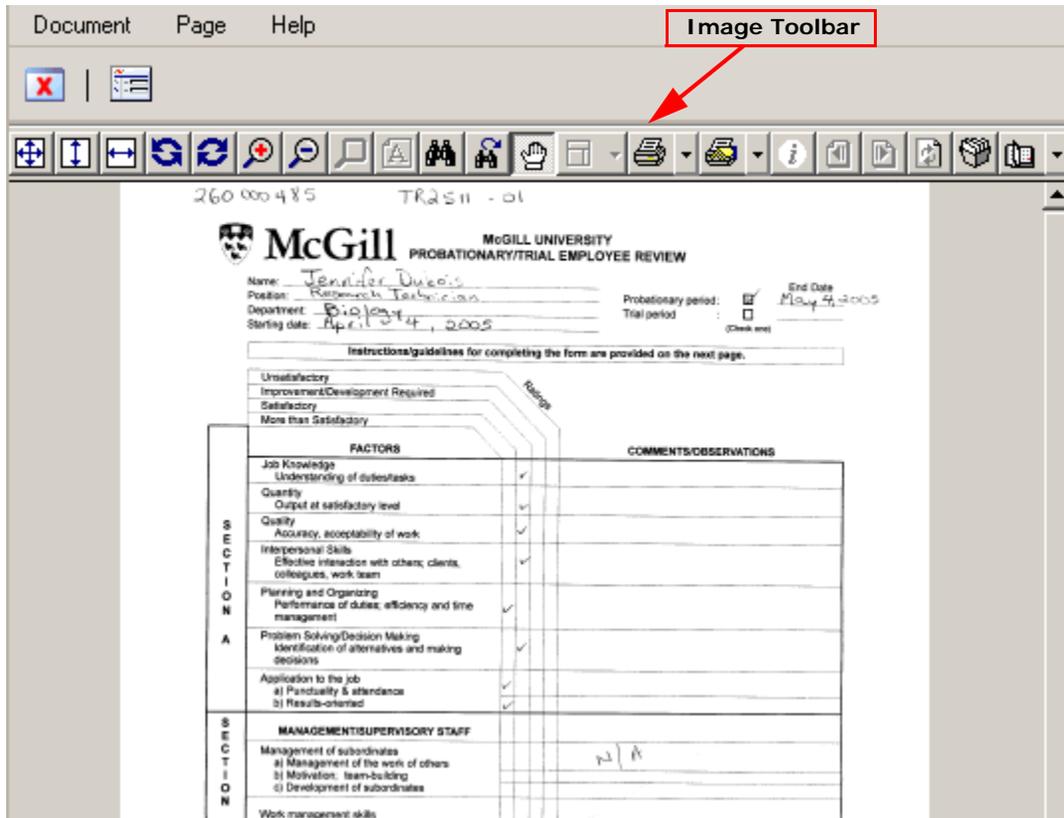
Document 1 - 2 of 2 **Document Icon**

<input type="checkbox"/>	ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE	PO
<input type="checkbox"/>	 260000485	60000966	CORRESPONDENCE	DUBOIS	JENNIFER			
<input type="checkbox"/>	 260000485	60000966	APPOINTMENTS AND CONTRACTS	DUBOIS	JENNIFER			

How to query and print documents



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. For detailed instructions on navigating using the Toolbar see ["How to use the WebXtender image toolbar"](#) on page 22.
- To return to the Search Results, close the document view window.



Tip

In WebXtender, 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.

How to query and print documents



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 Query Results	Follow the instructions in the section "How to Print Documents with WebXtender" on page 24
View the application documents for a different employee	Return to Banner and repeat steps 2 to 5
Exit WebXtender	Do not click on the  in the upper right hand corner. Instead click on the Logout  icon

How to query documents	✓
What's Next?	
Using the image toolbar	
How to print documents	
How to register your e-mail address	
How to e-mail documents	



How to use the WebXtender image toolbar

When you open a document, the **WebXtender 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.



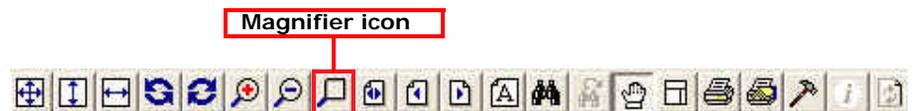
To rotate the displayed page 90 degrees to the left or right, use the **Page Rotate** icons.



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.



How to query and print documents



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.

Page Selection icons



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 WebXtender” on page 24.](#)

Print Page/Document icons



To configure WebXtender settings, use the **Configuration** icon to open the Interactive Client Configuration Properties dialog box.

Configuration icon



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

Refresh icon



How to query documents	✓
Using the image toolbar	✓
What's Next?	
How to print documents	
How to register your e-mail address	
How to e-mail documents	



How to print documents with WebXtender

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.

Logout View Help

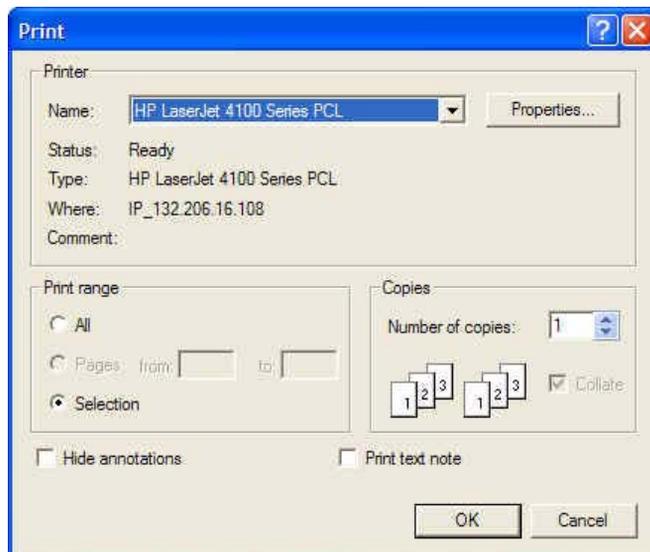
Icons: Key, Clipboard, Folder, Search, Print, Add, Search, Mail, Mail

Query Results for Application 'B-H-EMPL'

Document 1 - 2 of 2

<input type="checkbox"/>	ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DAT
<input type="checkbox"/>	260000507	60000988	CORRESPONDENCE	GAGNON	CAROLYN		
<input type="checkbox"/>	260000507	60000988	APPOINTMENTS AND CONTRACTS	GAGNON	CAROLYN		

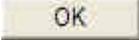
The **Print** dialog box will appear:



How to query and print documents



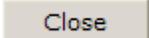
2 Select the printer from the drop-down menu, then enter the number of copies you would like to print.

3 Click 

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.



How to query documents	✓
Using the image toolbar	✓
How to print documents	✓
What's Next?	
How to register your e-mail address	
How to e-mail documents	

4 Click on  to return to the document.



Glossary of terms

ApplicationXtender: the client side application (part of the XS suite of imaging products) which enables users to scan, index, retrieve and view documents. Documents can be queried directly in AX or via Banner

Imaging: the conversion of paper documents into electronic images stored in a digital database.

Index: a set of values that categorize a document to facilitate retrieval. Each index used in XS products has a fixed number of attributes but each attribute may hold one of a variety of values.

ScanXtender: a client side application (part of the XS suite of imaging products) designed specifically for batch scanning documents

WebXtender: a server side browser based application (part of the XS suite of imaging products) designed to enable viewers to perform a variety of the functions available with AX in a remote browser format

Xtender Solutions: the brand name of the suite of imaging products offered by Sungard SCT for use with Banner.

IST- Customer Services (ICS)

Customer Support: via Virtual Help Desk:

<http://www.mcgill.ca/ics/vhd>

Knowledgebase:

<http://vhd.mcgill.ca/Knowledgebase/SelfServe/SSMain.aspx>

Training info:

<http://www.mcgill.ca/ics/training/webapps>

