Welcome to ApplicationXtender Web Access

ApplicationXtender Web Access allows you to manage all types of ApplicationXtender documents. By using ApplicationXtender Web Access and a standard Web browser, you can create, index, retrieve, access, view, and manage ApplicationXtender documents through the Internet.
Pre-requisites for WebXtender client

• Firefox, Chrome or Edge browser

• For scanning, your friendly neighborhood desktop support person will need to install the specific drivers on your computer for the scanner you want to use

• Link: https://bannerappx.yale.edu/AppXtender/?sso=true
Viewing documents
Click on the application you want to select

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https://bannerappx.yale.edu/AppXtender/?sso=true
Viewing documents

Click on new query
Enter your search criteria and click Run.
Viewing documents

Test Document #1
Drag and drop new documents
Drag and drop a new document

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Drag and drop a new document

Click here to drag in a new document...

...OR click on the plus sign and then click on ‘New Document’
Drag and drop a new document

Identify the file you want to index, then drag and drop it into the document area.
Drag and drop a new document

If you’re not sure, just pick ‘Insert After’
Drag and drop a new document

Click here to display thumbnails of a multi-page document or a batch

Document displays here

ApplicationXtender

Johnny's in the basement
Writing on the newspaper
The man in the trench coat
Sage's not bad cough
John's got a cold cough

If something you'd

But you're gonna happen
Your father could throw the alley man

Magpie's got a fast foot
Fast as a tracked sold
tilated feet in the past

The chronicle looted anyway
Magpie says that harry why
Orders from the D.A. Look out lad

Don't mind what you did

Don't like to know

Better stay away from those

Have a clean nose
Drag and drop a new document

Enter the student ID and press enter to auto-fill info from Banner

You will need to manually populate other required fields
Scan and index
Setting up for scanning...

Your user settings must allow scanning or the scan icon will not appear in the document area.

To set up, go to your avatar in the top right hand corner of the application window...

Select ‘User Settings’ from the pop-up menu...

Expand the list item for ‘Import’...

Make sure the box is checked for ‘Enable Scanning’ and click SAVE.
Setting up for scanning...

Make sure your scanner is turned on
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Scan and index a new document

Click here to scan in a new document...

…OR click on the plus sign and then click on ‘New Document’
Scan and index a new document

If the scanner icon appears gray, click once to load the driver.
Scan and index a new document

Load your documents into the scanner and click the 'Scan' button.
Scan and index a new document

Chapter 3

Working With Documents

Using AppXtender Web Access, you can perform many of the document-related functions that are available in AppXtender Document Manager. For example, you can still add new documents, edit existing documents, add pages to documents, and remove pages from documents. You can also index both documents and use automated indexing functionality to automatically index new documents.

This section of topics provides information and procedures related to adding and adding documents and pages, indexing documents, and submitting documents for full-text indexing.

- Adding Documents to AppXtender Applications, page 93
- Indexing Styles, page 182
- Submitting Documents for Full-Text Indexing, page 124
- Adding Pages to AppXtender Documents, page 123
- Resubmitting Document Pages, page 129
- Moving or Copying Documents/Tapes, page 139
- Deleting Documents and Document Pages, page 138

Adding Documents to AppXtender Applications

The way you use AppXtender Web Access to add documents to AppXtender applications depends on whether the documents are in paper or electronic form.

- Paper documents, authorized users scan the paper documents to create electronic files.
Scan and index a new document

Enter a student ID here and press ENTER. The system will fetch details if it can find the student in Banner.
**Scan and index a new document**

Using AppXtender Web Access, you can perform many of the document-related functions that are available in AppXtender Document Manager. For example, you can scan new documents, add pages to documents, and remove pages from documents. You can also index both documents and scan automated indexing functions to automatically index new documents.

This section of the text provides information and procedures related to adding and adding documents, pages, indexing documents, and submitting documents for full-text indexing.

- Adding Documents to AppXtender Applications, page 95
- Indexing Basics, page 132
- Submitting Documents for Full-Text Indexing, page 133
- Adding Pages to AppXtender Documents, page 133
- Replacing Document Pages, page 139
- Moving or Copying Document Pages, page 139
- Deleting Documents and Document Pages, page 169

### Adding Documents to AppXtender Applications

The way you use AppXtender Web Access to add documents to AppXtender applications depends on whether the documents are in paper or electronic form.

- For paper documents, authorized users scan the paper documents in create electronic versions.

Enter all other fields as required by your application's rules and click SAVE.

---

### Document Details

- **ID:** 03
- **PIM:** 12
- **DOCUMENT TYPE:** TRACKING REQUIREMENT
- **LAST NAME:** ITT
- **FIRST NAME:** ITT
- **BIRTH DATE:** 12-Feb-1987
- **AID YEAR:** 1819
- **TRACKING REQUIREMENT:** BUCKLE
- **TRACKING STATUS:** R
- **FUND:**
- **SOURCE/INST CODE:**
- **PERIOD:**
- **ROUTING STATUS:**
- **ACTIVITY DATE:** Timestamp
- **VPSL CODE:**
- **DISPOSITION DATE:**
Scan and index a new document

Chapter 3

Working With Documents

Using ApplicationXtender Web Access, you can perform many of the document-related functions that are available in ApplicationXtender Document Manager. For example, you can add new documents, delete existing documents, add pages to documents, and remove pages from documents. You can also index batch documents and use automated indexing functionality to automatically index new documents.

This section of topics provides information and procedures related to adding and deleting documents and pages, adding documents, and re-indexing documents for AdOpt indexing.

- Adding Documents to ApplicationXtender Applications, page 16
- Adding Documents to ApplicationXtender Applications, page 174
- Adding Pages to ApplicationXtender Documents, page 123
- Re-indexing Document Pages, page 123
- Moving or Copying Document Pages, page 128
- Deleting Documents and Document Pages, page 130

Adding Documents to AppXtender Applications

The way you use ApplicationXtender Web Access to add documents to AppXtender applications depends on whether the documents are in paper or electronic form.

- For paper documents, authorized users must scan paper documents to create electronic files.
Scan to batch
Scan to batch

User Settings

<table>
<thead>
<tr>
<th>Data Source</th>
<th>Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search/Result Set</td>
<td></td>
</tr>
<tr>
<td>Document View</td>
<td></td>
</tr>
<tr>
<td>Index</td>
<td></td>
</tr>
<tr>
<td><strong>Import</strong></td>
<td></td>
</tr>
</tbody>
</table>
| Display Batch in Separate Popup Window | ☐
| Enable Scanning | ☑
| Import Email Attachment as New Page | ☑
| Start New Document from a temporary Batch | ☐
| **Export** | |
| COLD | |
| Print | |
| Email | |
| Full-Text | |
| Others | |

Click on Import

Click Save

Check Enable Scanning

https://bannerappx.yale.edu/AppXtender/?sso=true
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Scan to batch

Click on New batch
Scan to batch

Enter name of the batch

Click Continue
Scan to batch

Click on select Scanner icon
Select Scanner name
Click OK
Scan to batch

Click on Scan icon

Scanning in progress
Scan to batch

Chapter 3

Working With Documents

Using ApplicationXtender Web Access, you can perform many of the document-related functions that are available in ApplicationXtender Document Manager. For example, you can add new documents, batch indexing documents, add pages to documents, and rename pages from documents. You can also add new documents and delete documents. However, you cannot perform specific functions such as batch indexing documents or marking finished documents for full-text indexing.

This section of topics provides information and procedures related to adding and deleting documents and adding pages to documents and adding documents for full-text indexing.

- Adding Documents to ApplicationXtender Applications, page 30
- Adding Documents to ApplicationXtender Applications, page 31
- Adding Documents to ApplicationXtender Applications, page 32
- Adding Documents to ApplicationXtender Applications, page 33
- Adding Documents to ApplicationXtender Applications, page 34
- Adding Documents to ApplicationXtender Applications, page 35
- Adding Documents to ApplicationXtender Applications, page 36
- Adding Documents to ApplicationXtender Applications, page 37
- Adding Documents to ApplicationXtender Applications, page 38
- Adding Documents to ApplicationXtender Applications, page 39
- Adding Documents to ApplicationXtender Applications, page 40

Adding Documents to AppXtender Applications

The way you use ApplicationXtender Web Access to add documents to AppXtender applications depends on whether the documents are in paper or electronic form.

- For paper documents, authorized users can use the paper documents to create electronic files.
- For electronically documents, authorized users can import the electronic files into AppXtender Web Access.

Note: Electronic files can contain one or more individual documents.

This topic focuses on adding documents to AppXtender applications by importing electronic files. For more information, see Chapter 4, Scanning. You must have the appropriate AppXtender privileges to add documents to AppXtender applications. For information about your user profile, consult your AppXtender system administrator or your AppXtender System Administrator's Guide.

AppXtender Web Access offers two ways to add documents to AppXtender applications: the New Document feature and the Batch Import feature.
Index existing batch
Click on the name of the application to get started

Click here to view existing batches...

...OR click on the plus sign and then click on ‘Manage Batches’
Locate your batch and click the triangle for the pop-up menu. Then choose ‘Index’ from the pop-up menu.
Index existing batch

If enabled, document thumbnails will appear on the left.

First page of batch will display first.

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Index existing batch

Entering ID and hitting TAB populates basic info
Index existing batch

Enter additional required info

Click save
Indexed page is removed from the batch. Next page is displayed.

Number of pages in batch is changed.
Index existing batch – next page in batch is same student or vendor, same document type

Click ‘Attach Current Page’ to add the next doc to the same index.
Index existing batch – next page in batch is same student or vendor but different doc type

Click ‘Modify’ to keep the key index but change other index values
Index existing batch – next page in batch is same student or vendor but different doc type

Key index is the same, but we can change the Document Type

Click ‘Save’ to index the document and remove it from the batch
Index existing batch – next page is different student or vendor

- Change the ID number and hit TAB to auto-populate the other index fields
- Change the other required fields as needed
- Click ‘Save’ to index the document and remove it from the batch

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Index existing batch – all remaining pages are the same student, same document type

Click ‘Attach All Pages’ to attach remaining pages to the same index
Index existing batch – all remaining pages are the same student, same document type

Click ‘OK’
Index existing batch

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https://bannerappx.yale.edu/AppXtender/?sso=true
Index from batch problem: “A unique key violation has occurred!”

Click ‘OK’

Then click ‘Select Index’ to bring up the document that already has this index. You can then append the new Doc to the existing Doc.
Problem: When I try to index a document from a batch, system displays error “Document Index is Duplicated”