



ApplicationXtender 16.3

**How to Search, Retrieve, & Index Documents
With ApplicationXtender Web Access**

Introduction

ApplicationXtender is Collin College's document imaging system. ApplicationXtender version 16.3, hereafter referred to as "Xtender", enables users to query, create, index, and annotate electronic documents.

Xtender Overview of features

- Scan documents to create new or add to existing documents or batches. Scanning in Xtender 16.3 requires the installation of the "Captive Cloud Toolkit" software. To have this software installed on your computer, submit a ticket with the Help Desk.
- Add/import electronic files to the Xtender as individual documents, batches, and individual pages. As you will see, Xtender 16.3 allows you to "click and drag" files from your local file system into the Xtender document import window.
- Index documents by specifying information in the application-specific index fields. Indexing enables you to organize, search, and retrieve documents efficiently.
- Retrieve documents through queries by using various search methods.
- Attach annotations or redactions to highlight important information, comment on the contents of the page, or block areas of the page from view.

Document storage and display

You can store any type of file in Xtender. However, depending on the type, Xtender stores files as supported or unsupported file types. Features that are available with one file type might not be available in another. Also, supported and unsupported files types are displayed in different ways.

Supported file types

Supported files are defined as those file types that Xtender can display within the Xtender Web Access window. The following file types are supported:

1. Text files (TXT)
2. Image files (JPEG, GIF, TIFF, Windows Bitmap, PCX, DCX, and TGA)
3. Adobe Portable Document Format (PDF) files.
4. Rich Text Format (RTF) files
5. Hypertext Markup Language (HTML) files
6. Extensible Markup Language (XML) files

Unsupported-Foreign file types

Unsupported file types are those that can be imported into Xtender, but can't be displayed in the Xtender Web Access viewer. Example of foreign files include Excel spreadsheet files; MS-Word documents, PowerPoint files and others.

Foreign files stored in Xtender can be viewed in one of two ways:

1. Download the foreign file. This option will display the foreign file within the application associated with the file type. For example, an Excel file will display within MS-Excel; Word documents will display in MS-Word and so on.
2. Render the foreign file. This option will attempt to display the contents within your web browser.

When you hover over the thumbnail of a foreign file in the query results screen, the document thumbnail will reveal that the document is a foreign file:



When a foreign file is opened in Xtender, it will provide the following options for display:



Clicking the “Download Foreign File” option will enable you to display the contents of the file in the native application associated with the file type. For example, a file with a “.xls” file extension will display in Microsoft Excel; files with a “.docx” extension will display in Microsoft Word and so on.

Clicking the “Render Foreign File” option will result in the file/document content displaying in your web browser window. Both display options are acceptable if the intention is just to view the document content, but the native application option such as Microsoft Excel provides more options.

Getting Started - How to Access Xtender

There are 2 ways to access Xtender:

1. From a Browser
2. From Banner

1. Accessing Xtender from a browser. All browsers work with 16.3
<http://bdms-test/AppXtender/login.aspx>

opentext™ | ApplicationXtender

SBOX

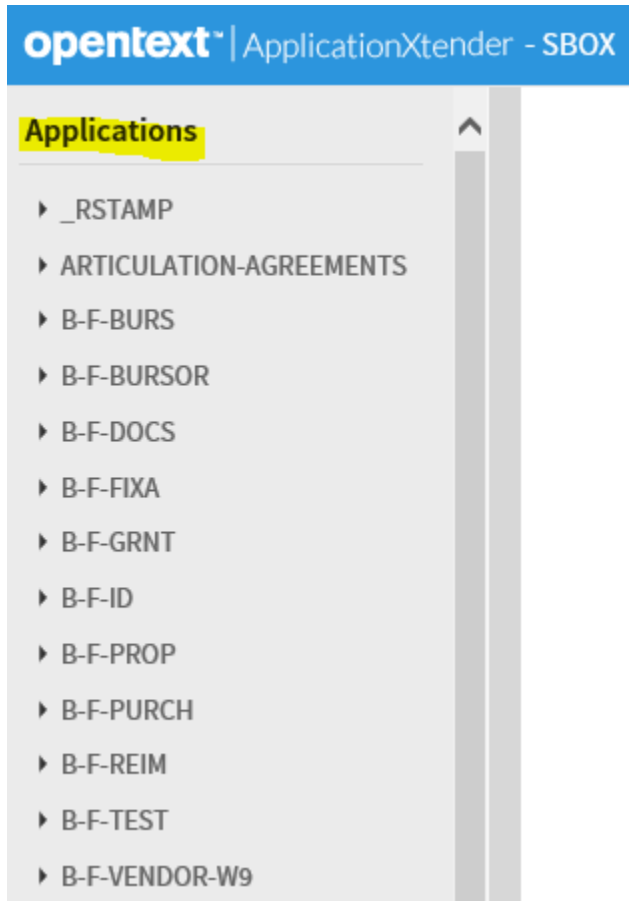
Enter User Name

Enter Password

Request Full Text Search Support

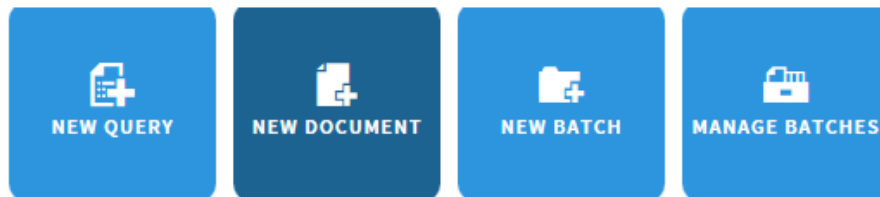
SIGN IN

After logging in you will see a Welcome screen initially and all the Applications you have access to on the left.



Select the application by clicking on it. You will see the actions you can take:

B-S-ADMN - BANNER STUDENT ADMISSIONS
































How to Create/Run Queries



Click New Query to see Search Criteria. The search criteria could be different depending on your Application [B-S-ADMN, B-R-TREQ, B-F-DOCS, etc.]

New Search - B-S-ADMN

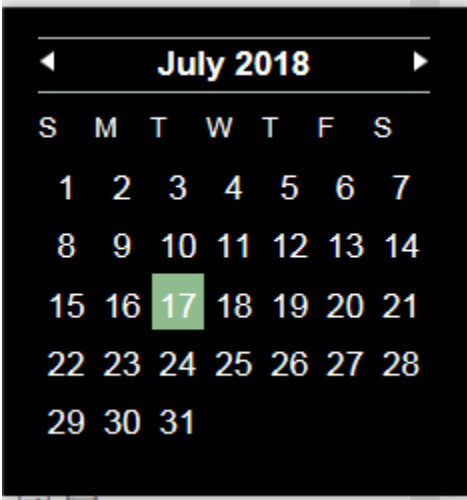
Search Criteria
Enter a search term in the index fields to filter your results.

ID	<input type="text"/>	 
PIDM	<input type="text"/>	 
DOCUMENT TYPE	Multiple select / Input and enter	
LAST NAME	<input type="text"/>	 
FIRST NAME	<input type="text"/>	 
SSN	<input type="text"/>	 
BIRTH DATE	<input type="text"/>	  
TERM CODE	Multiple select / Input and enter	
APPLICATION NUMBER	<input type="text"/>	 
ADMISSIONS REQUIREMENT	Multiple select / Input and enter	
INSTITUTION NUMBER	<input type="text"/>	 
ROUTING STATUS	Multiple select / Input and enter	
ACTIVITY DATE	<input type="text"/>	 
DISPOSITION DATE	<input type="text"/>	  
DOCCATEGORY	Multiple select / Input and enter	
RECRUITER ID	<input type="text"/>	 

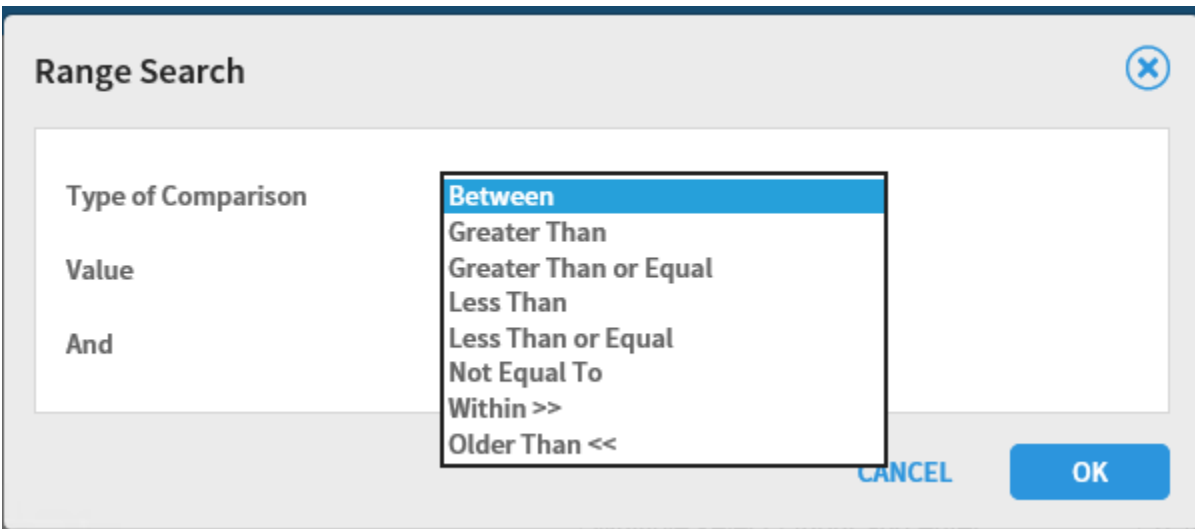
There are icons for each index field:



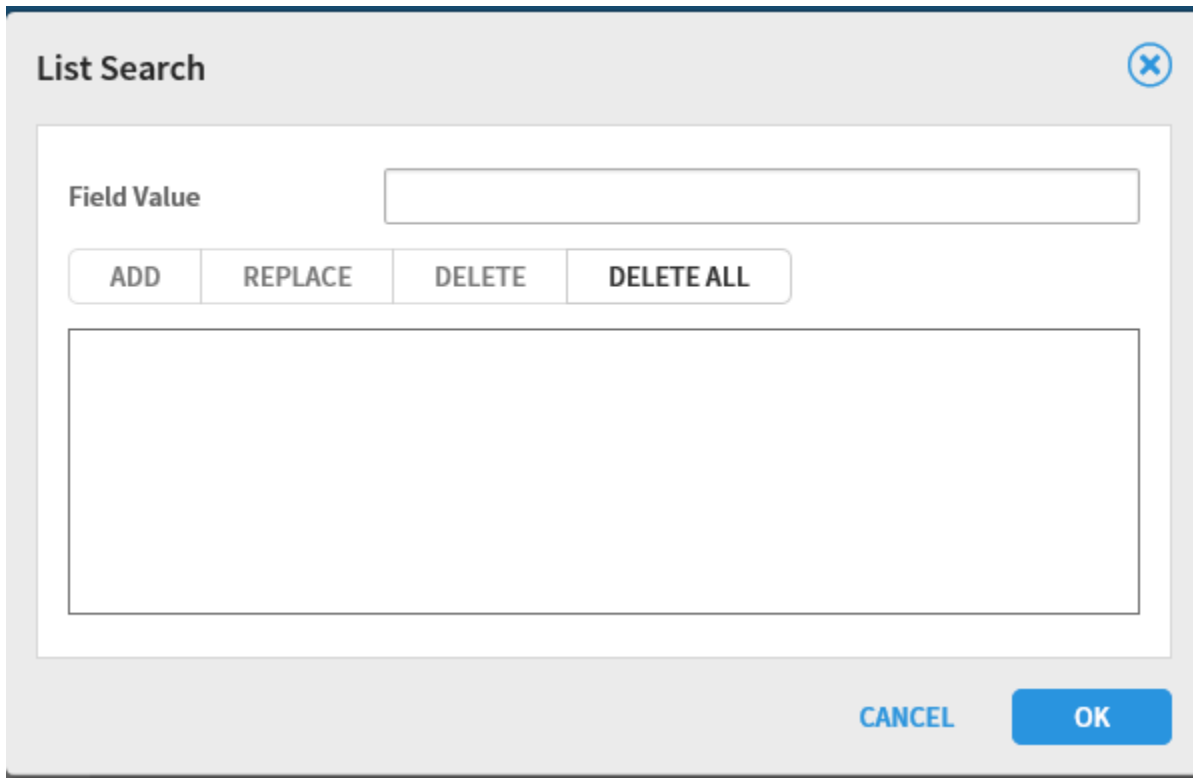
The first one allows you to search by date and will provide a Calendar when you click the icon:



The second is a Range Search.



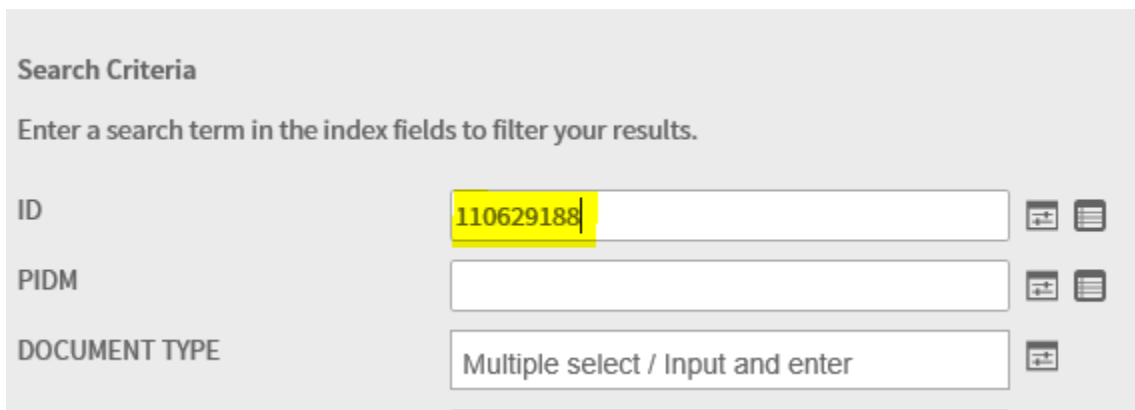
The third is a list search.



The image shows a 'List Search' dialog box. At the top left is the title 'List Search' and a close button (X) in a blue circle. Below the title is a 'Field Value' label and an empty text input field. Underneath the input field are four buttons: 'ADD', 'REPLACE', 'DELETE', and 'DELETE ALL'. Below these buttons is a large empty rectangular area, likely for displaying search results. At the bottom right of the dialog are two buttons: 'CANCEL' and 'OK'.

In this example, we are going to use a simple search by CWID.

I will enter a CWID and press Enter or click Run



The image shows a 'Search Criteria' form. At the top is the title 'Search Criteria' and a subtitle 'Enter a search term in the index fields to filter your results.' Below this are three rows of input fields. The first row is labeled 'ID' and contains the value '110629188' in a yellow-highlighted text box, with a search icon and a list icon to its right. The second row is labeled 'PIDM' and contains an empty text box, with a search icon and a list icon to its right. The third row is labeled 'DOCUMENT TYPE' and contains the text 'Multiple select / Input and enter' in a text box, with a search icon to its right.

I will then see the results for that CWID in Query Results

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Query Results

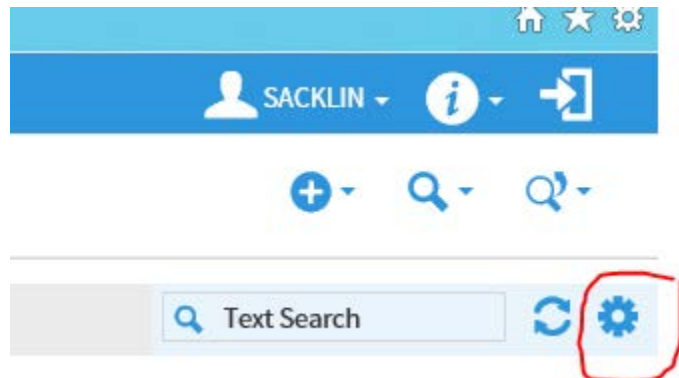


B-S-ADMN > New Search > Query Results

Text Search

<input type="checkbox"/>	ID		DOCUMENT TYPE	LAST NAME	FIRST NAME	TERM CODE	ACTIVITY DATE	DOCCATEGORY	Pages	
<input type="checkbox"/>	<input type="checkbox"/>	110629188	<input type="button" value="v"/>	ADMISSIONS APP	ACKLIN	SANDRA	201715	2018-05-31 11:15:19	NON PERMANENT	2
<input type="checkbox"/>	<input type="checkbox"/>	110629188	<input type="button" value="v"/>	APPLICATION INFO	ACKLIN	SANDRA	201940	2018-05-24 09:44:26	NON PERMANENT	2
<input type="checkbox"/>	<input type="checkbox"/>	110629188	<input type="button" value="v"/>	APPLICATION INFO	ACKLIN	SANDRA	201815	2018-05-24 09:41:44	NON PERMANENT	3
<input type="checkbox"/>	<input type="checkbox"/>	110629188	<input type="button" value="v"/>	ADMISSIONS APP	ACKLIN	SANDRA	201615	2018-05-24 09:38:57	NON PERMANENT	3
<input type="checkbox"/>	<input type="checkbox"/>	110629188	<input type="button" value="v"/>	ADMISSIONS APP	ACKLIN	SANDRA	201474	2018-05-23 10:05:26	NON PERMANENT	2
<input type="checkbox"/>	<input type="checkbox"/>	110629188	<input type="button" value="v"/>	ADMISSIONS APP	ACKLIN	SANDRA	201771	2018-05-17 09:35:04	NON PERMANENT	5
<input type="checkbox"/>	<input type="checkbox"/>	110629188	<input type="button" value="v"/>	COLLEGE TRANSCRIPT	ACKLIN	SANDRA	201930	2018-05-17 07:45:09	PERMANENT	7
<input type="checkbox"/>	<input type="checkbox"/>	110629188	<input type="button" value="v"/>	ADMISSIONS APP	ACKLIN	SANDRA	201810	2018-05-16 13:50:11	NON PERMANENT	8
<input type="checkbox"/>	<input type="checkbox"/>	110629188	<input type="button" value="v"/>	ADMISSIONS APP	ACKLIN	SANDRA	201871	2018-05-16 10:59:13	NON PERMANENT	3
<input type="checkbox"/>	<input type="checkbox"/>	110629188	<input type="button" value="v"/>	ADMISSIONS APP	ACKLIN	SANDRA	201910	2018-05-16 10:52:00	NON PERMANENT	10

Query Results is customizable so you can restrict the number of index fields displayed. To customize click the Cog icon:



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Select the Index Fields you want to display.

Save








Customize Query Results ✕








Display	Index Field	▲ ▼
<input checked="" type="checkbox"/>	ID	▲
<input type="checkbox"/>	PIDM	
<input checked="" type="checkbox"/>	DOCUMENT TYPE	
<input checked="" type="checkbox"/>	LAST NAME	
<input checked="" type="checkbox"/>	FIRST NAME	
<input type="checkbox"/>	SSN	
<input type="checkbox"/>	BIRTH DATE	
<input checked="" type="checkbox"/>	TERM CODE	
<input type="checkbox"/>	APPLICATION NUMBER	▼

CANCEL SAVE

Query Results

B-S-ADMN > New Search > Query Results

<input type="checkbox"/>	ID	PIDM	DOCUMENT TYPE
<input type="checkbox"/>	 [REDACTED]	555	ADMISSIONS APP
<input type="checkbox"/>	 [REDACTED]		TRN APP PACKET
<input type="checkbox"/>	 [REDACTED]		T-SUPPORTING DOCUMENTS
<input type="checkbox"/>	 [REDACTED]		TEST SCORES
<input type="checkbox"/>	 [REDACTED]		FSH MISC.
<input type="checkbox"/>	 [REDACTED]		FSH MISC.
<input type="checkbox"/>	 [REDACTED]		FSH APP PACKET

-  Open
-  Print
-  Email
-  Delete
-  Export COLD
-  Submit OCR Job
-  Ad Hoc Text Search

opentext | ApplicationXtender - SBOX
SACKLIN i +

B-S-ADMIN > 110629188

Document Page EMAIL EXPORT PRINT

Page 1 / 2 Scanner Rotate 22% Zoom

Page 1

Page 2

Confidential & Proprietary Information

Option 1: Direct Connection using Secure Application protocols

Client Requirements

- A public facing firewall capable of publishing internal services and restricting access to defined Ad Astra IPs
- LDAPS public IP Address
- SMTPS public IP Address
- SIS Connection public IP Address
- For added security, all public IP address should be restricted to public Ad Astra IPs only, if possible.

PRE-PROJECT PREPARATION

Following are some common factors that will determine what server IP addresses to include in the tunnel encryption domain. The university Technical staff should be provided this list in order to prepare for the hosting setup portion of your implementation.

User Authentication - Lightweight Directory Access Protocol over SSL (LDAPS)

Establishing a secure LDAP connection using SSL, now called Transport Layer Security (TLS), requires that the server support the proper certification authority (CA) before the connection is attempted. In addition, the supply of an appropriate client certificate to the server when the SSL handshake is initiated by the connection attempt.

Messaging - Simple Mail Transport Protocol over TLS (SMTPS)

Establishing a secure SMTP connection using SSL, now called Transport Layer Security (TLS), requires that the server support the proper certification authority (CA) before the connection is attempted. In addition, the supply of an appropriate client certificate to the server when the SSL handshake is initiated by the connection attempt.

ID

PIDM

DOCUMENT TYPE

LAST NAME

FIRST NAME

SSN

BIRTH DATE

TERM CODE

APPLICATION NUMBER

ADMISSIONS REQUIREMENT

INSTITUTION NUMBER

ROUTING STATUS

ACTIVITY DATE

VPDI_CODE

DISPOSITION DATE

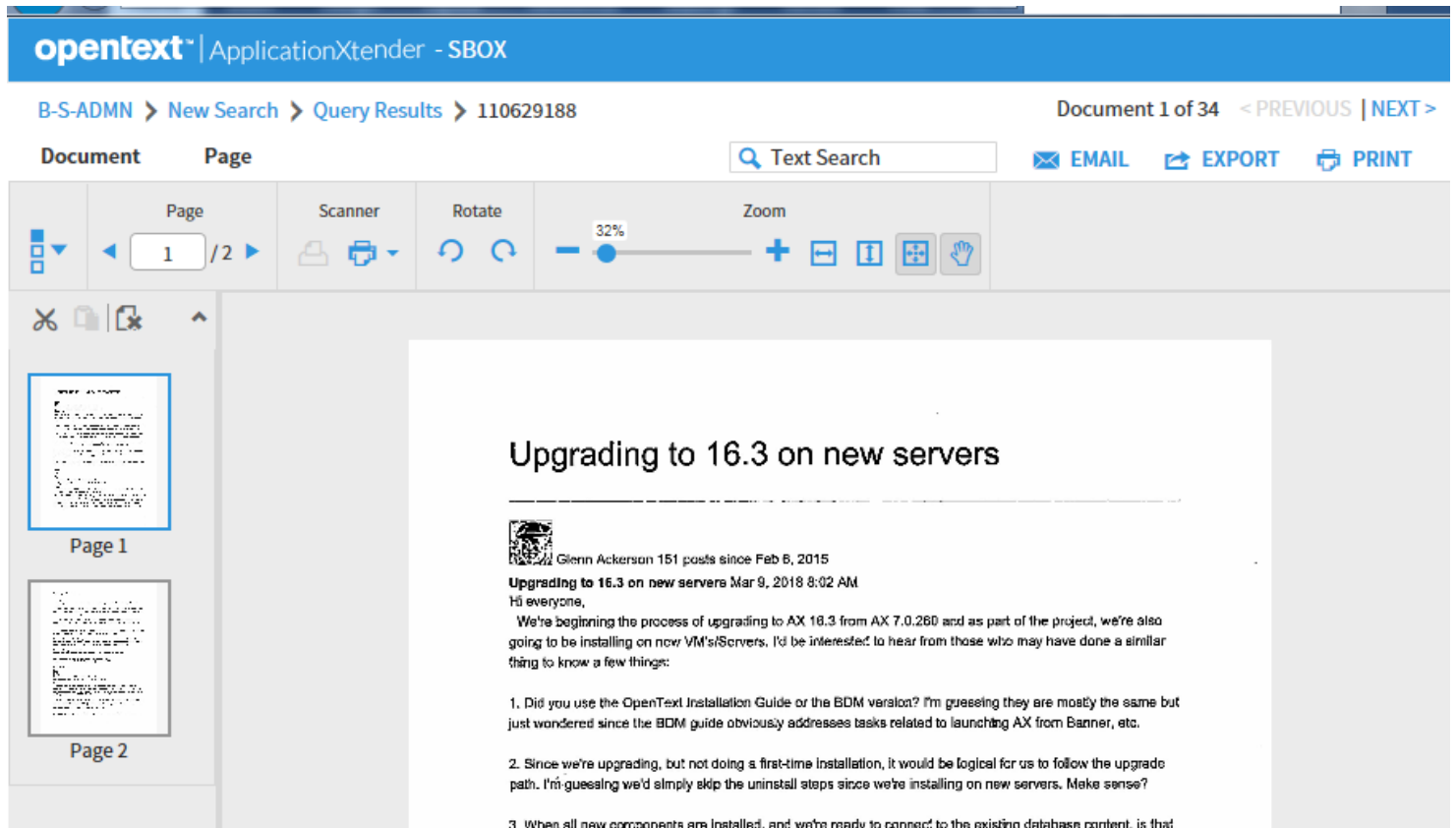
DOCCATEGORY

RECRUITER ID

MODIFY

Astra Cloud Hosting: Client Readiness Packet R2015.1018 aa.is.com

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Thumbnail Icon – Show/Hide Thumbnails

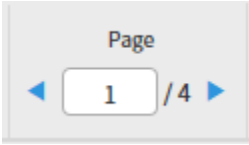
The thumbnail toolbar allows you to turn thumbnail display on or off. When the arrow next to the icon is pointing down, thumbnails are displayed:



Clicking on the thumbnail icon changes the mode to hide thumbnails and the arrow will point to the right:

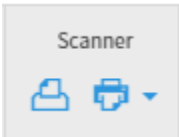


Page Navigation Icon



The page icon displays the current page number of a document and also provides you a method of advancing between pages in a document. To navigate between pages, simply click the right or left arrows of the navigation window.

Scanner Icons – Select Scanner

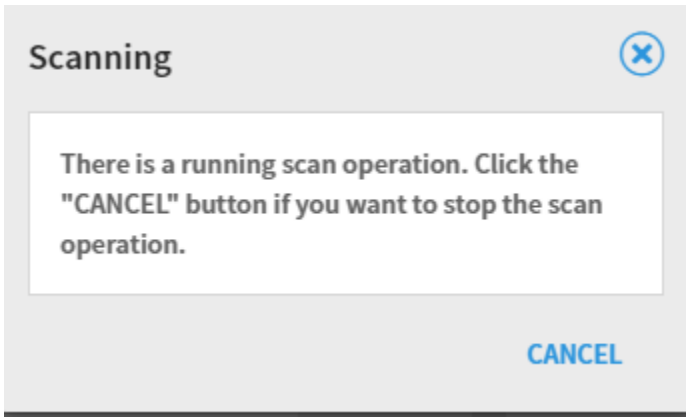


The icon on the right called the “Select Scanner” icon enables you to enable your scanner for use in Xtender. The drop-down arrow next to the Select Scanner icon also allows you to specify standard scanner attributes such as those shown below. Note that when possible, pages should be scanned in Black and White (if possible) with the smallest resolution possible (200 - 300,) to keep file sizes small.



Scanner Icons – Scan Page(s)

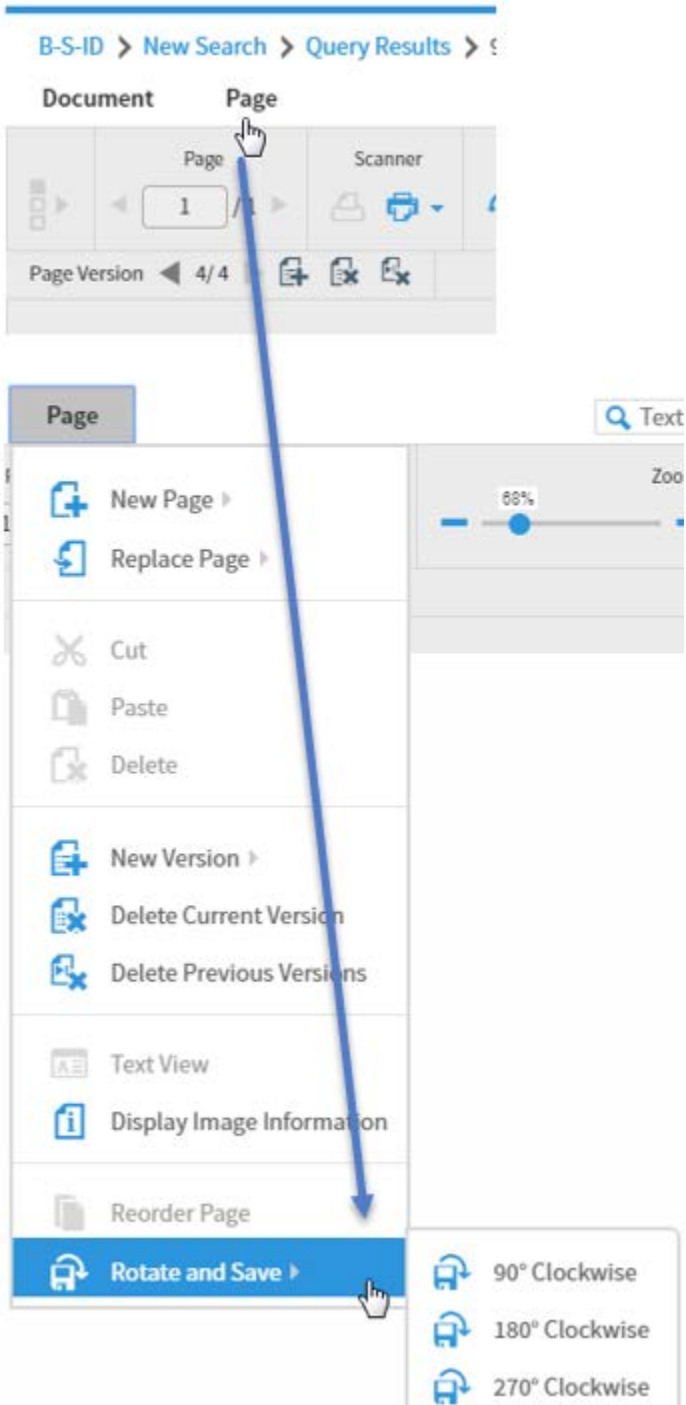
Once you have your scanner activated and both icons are highlighted, pressing the scanner icon on the left will start your scanner. As pages start scanning, Xtender will display the following message:



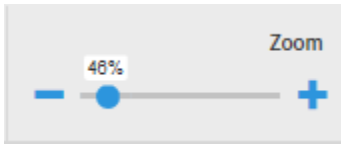
Rotate Icons – Rotate Page without saving page



The rotate icons enable you to rotate a page either clockwise or counter-clockwise. Note that the Rotate icons will not display if the document is a foreign file. If you want to save the current rotated page, see the navigation method of rotate and save shown on the following page.



Zoom Icons – Zoom slider bar



The zoom slider bar provides an easy method of zooming in and out on a page. A page can be enlarged or shrunk by simply sliding the dot left or right.

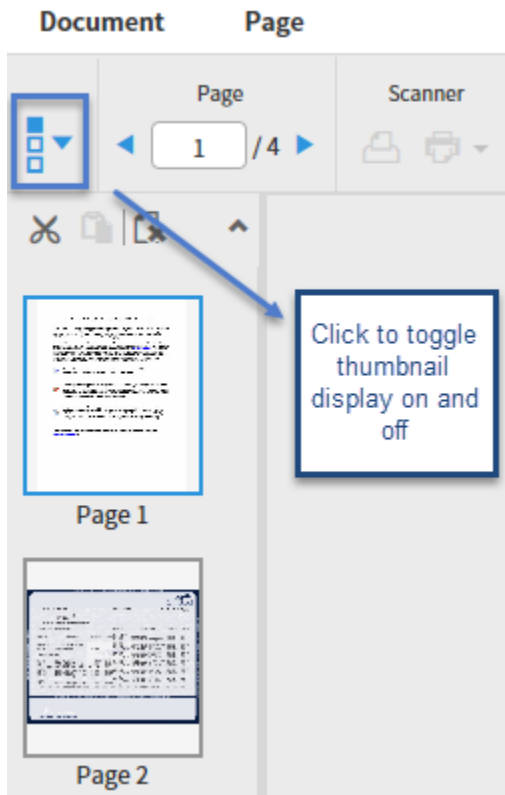
Zoom Icons – Fit Width, Fit Height or Fit to View



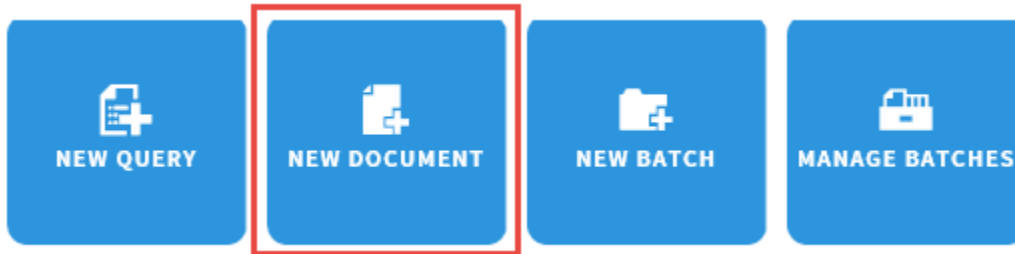
The fit width, height or fit to view icons allow you to resize the current page to maximize the viewing content either by width, height or overall size. The best icon to use will depend on the original size of the page when it was imported or scanned.

Document Thumbnails

Documents with two or more pages will open display with the Thumbnail window like the one shown below. The thumbnail view is helpful to see a page at a glance for navigation purposes. And, the thumbnails also provide a means of reordering pages by clicking and dragging a page to the order of the document you choose.



How to Create a New Document

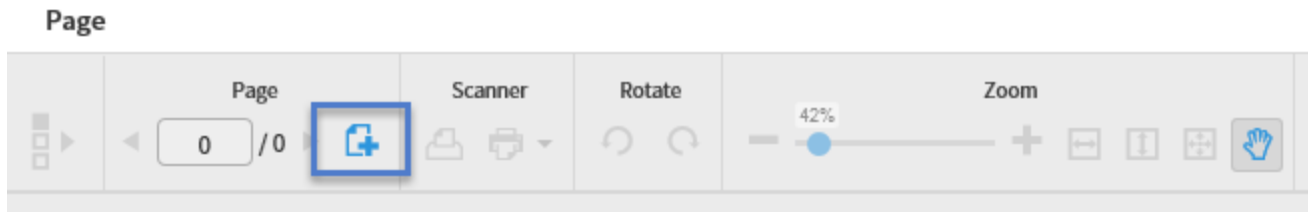


New Document will save ALL scanned pages to a single index.

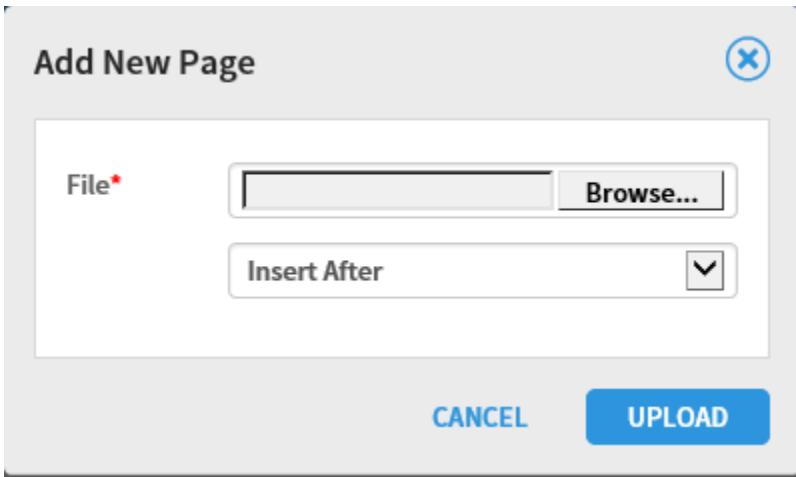
To create/index a document using the New Document option, there are two methods:

1. Import a document from your local file system.
2. Scan a document from either a local or network scanner.

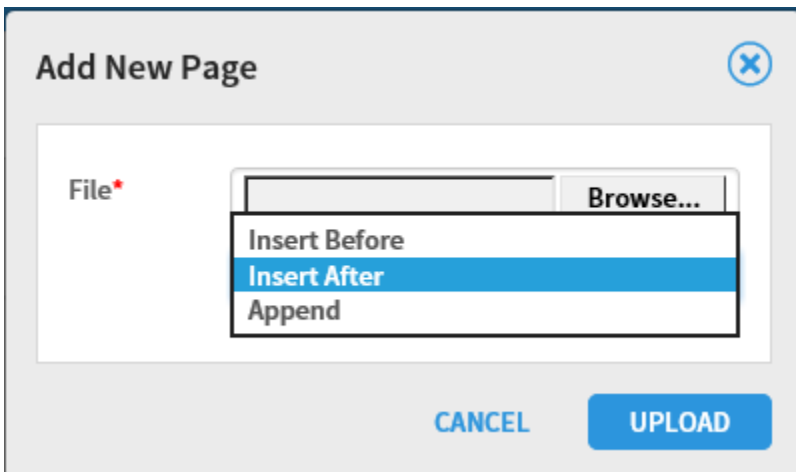
How to Import a New Documents – Toolbar Method



Xtender enables you to import electronic documents from your local file system by clicking on the Add Page icon on the toolbar as shown above. Clicking this icon will open the Add New Page screen shown below:



Note that there are 3 options for the placement of the page(s) you are importing. For the first page you are importing, the option doesn't matter. But, after adding one or more pages, you can then insert or append new pages before (Insert Before) or after the previous pages (Insert After or Append.)

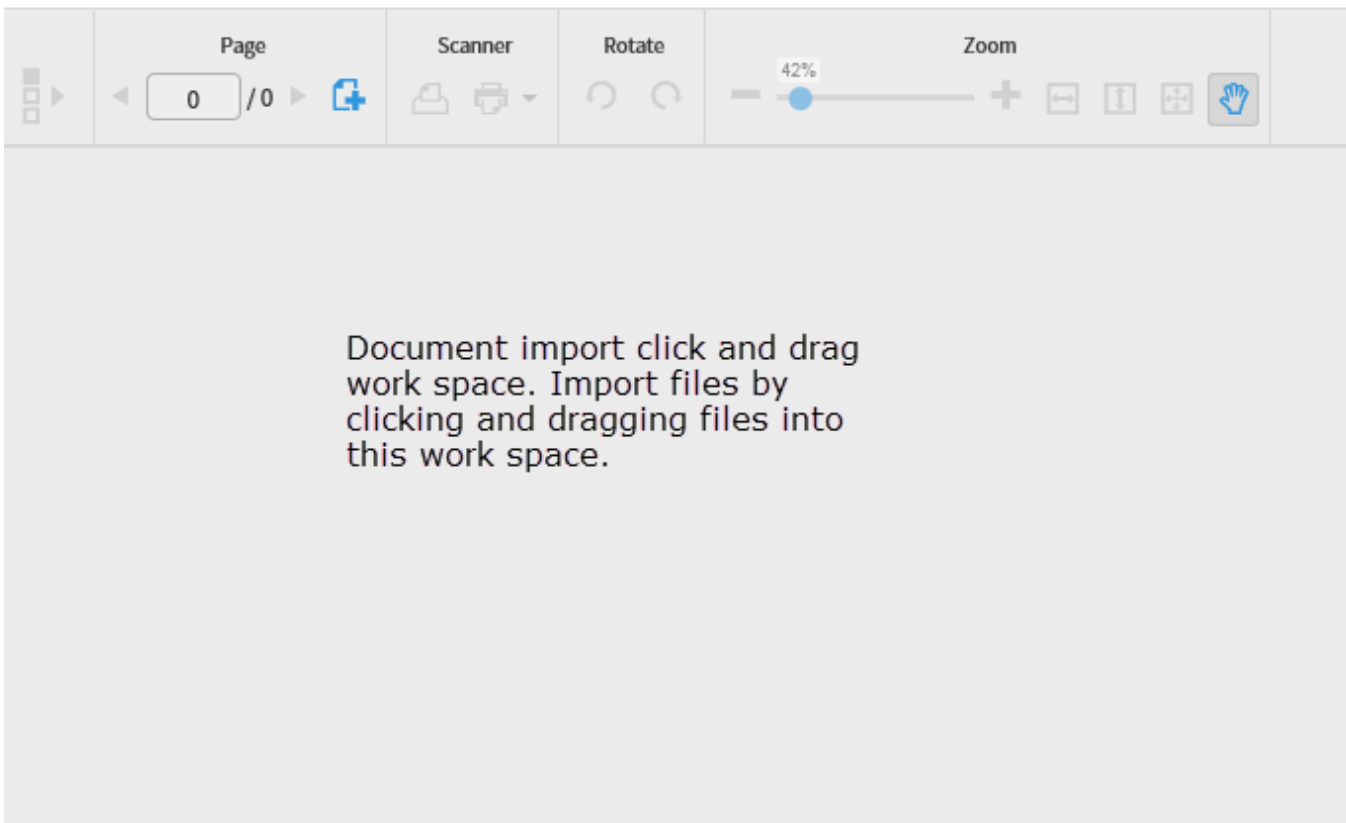


How to Import a New Documents - Click and Drag Method

The second method of importing a document uses a Windows click and drag technique. In the screen shot shown below, you'll see the document import work space. To import a file from your local file system, you can simply click and drag the file into the work space. The document will then show the same as if you pointed to it and imported in the prior import section. Note that when you use the click and drag method, there's no need to click on the Add New Page icon in the toolbar. Xtender will know you are adding a page. And, you will still have the 3 page positional options of Insert Before, Insert After or Append.

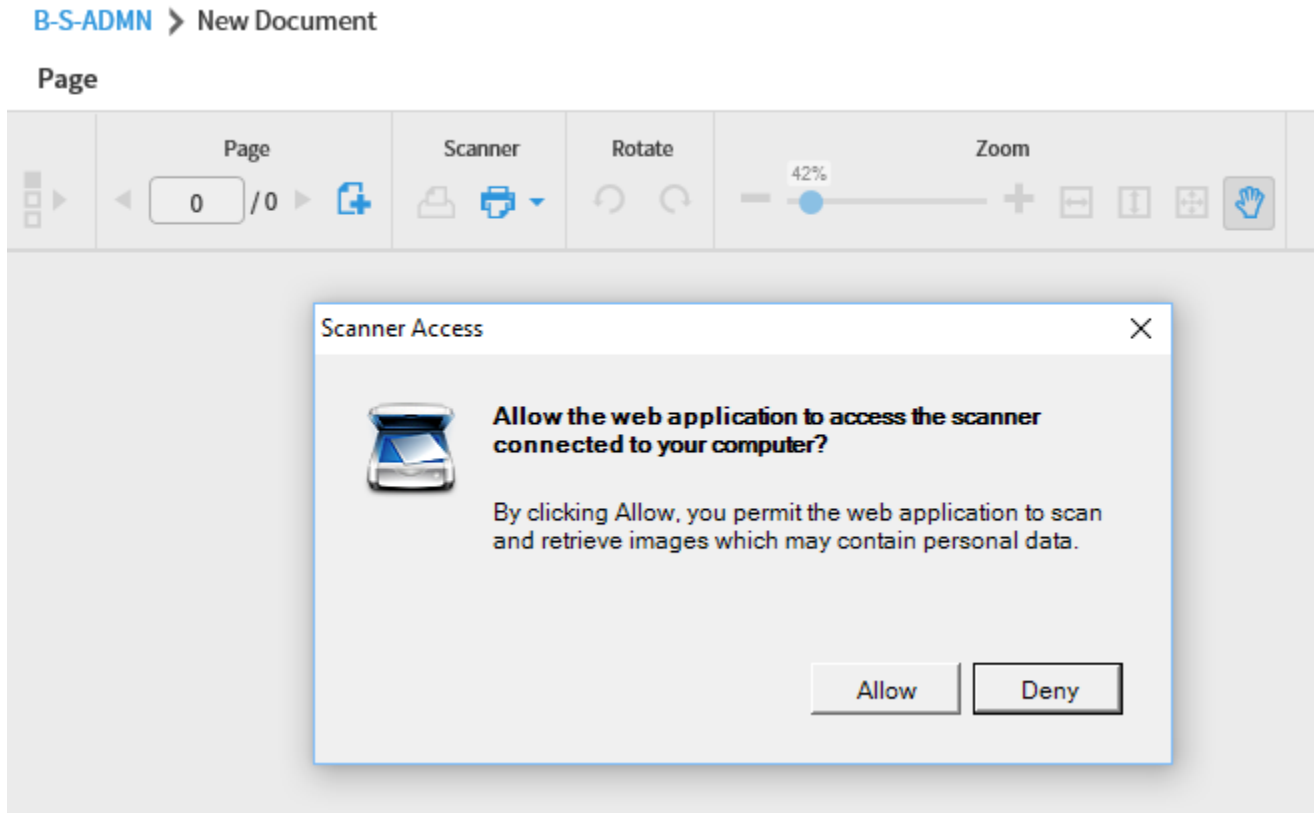
B-S-ADMN > New Document

Page



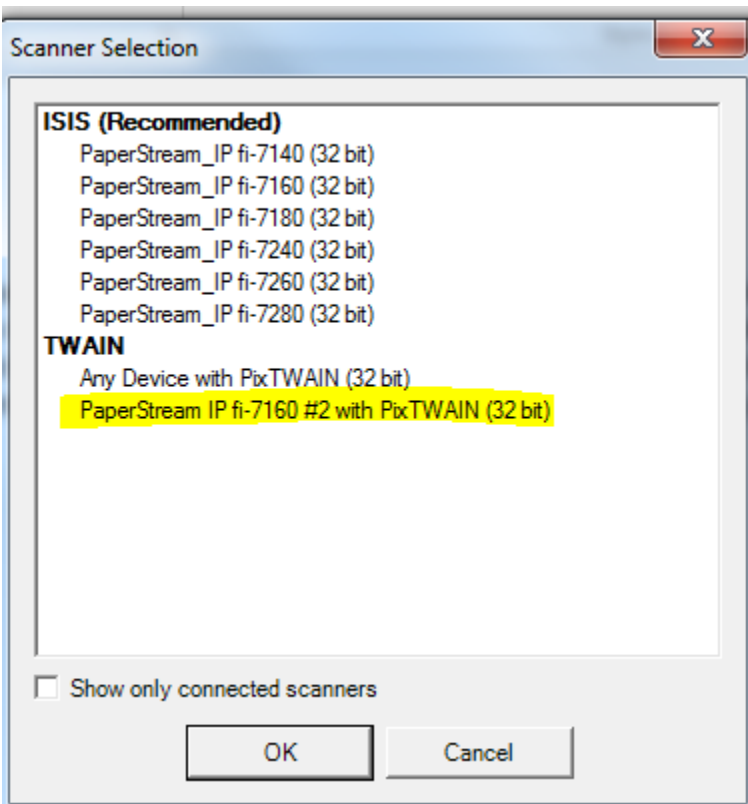
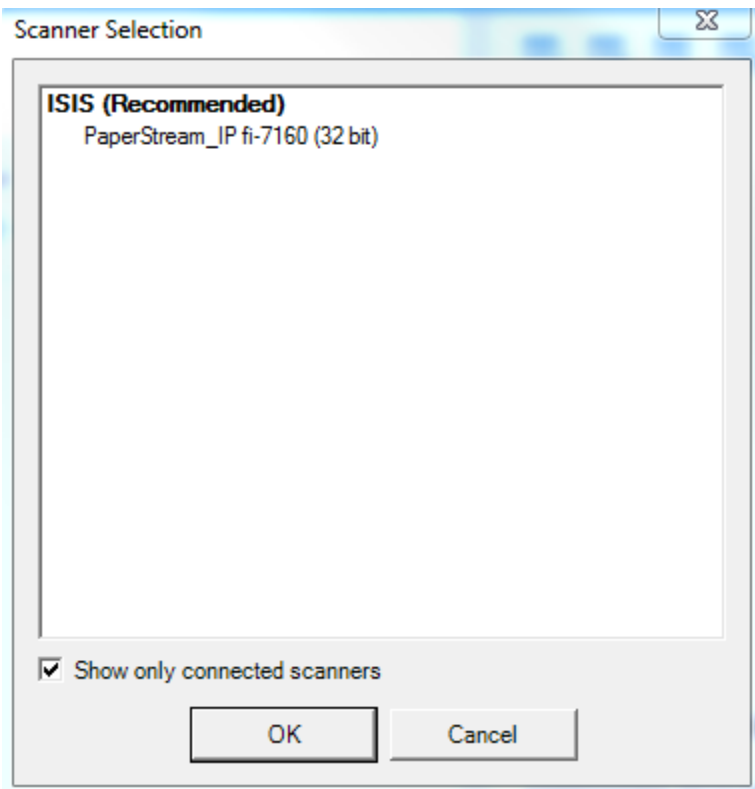
How to Set up Your Scanner

Once you have Captiva Cloud Toolkit installed, click on the highlighted scanner icon shown in the toolbar below (the scanner icon with the drop-down arrow.) This action will prompt you to allow use of your scanner with Xtender. When prompted, click “Allow” to enable your scanner for use in Xtender.



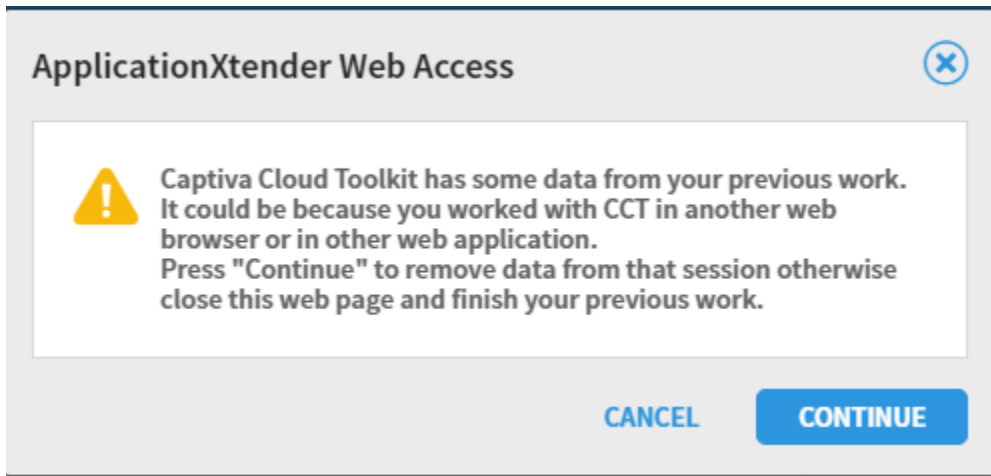
Once you have allowed scanner access by Xtender, you may then be prompted to select the scanner driver software you elect to use.

If you DO NOT see the TWAIN driver please uncheck the Show only connected scanners and click OK



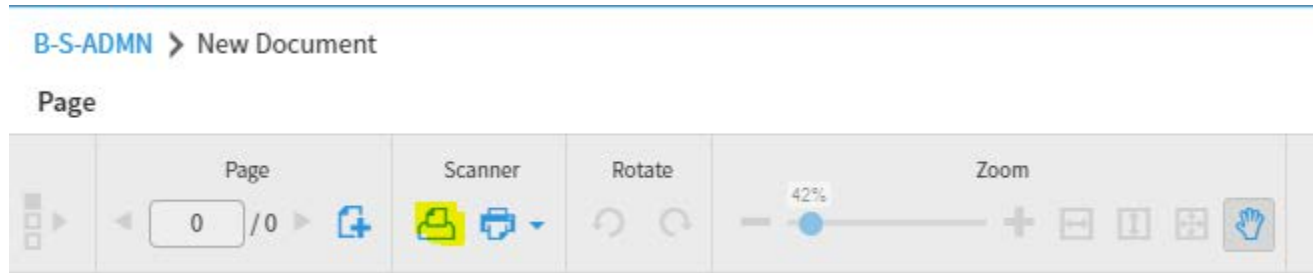
Click OK

Note: If you see the following message display when you attempt to use your scanner, click CONTINUE to resume using your scanner.

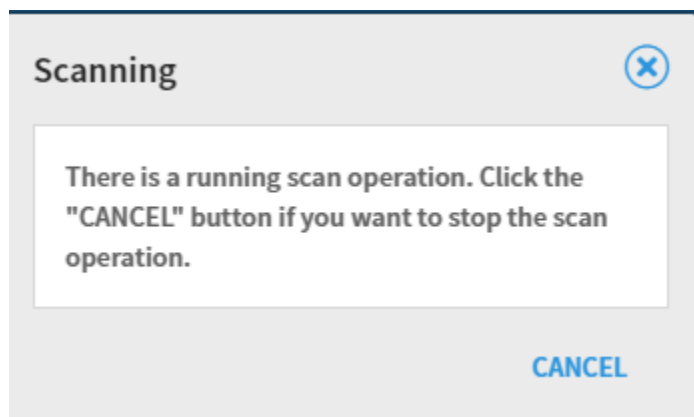


How to Scan a Document

When your scanner is selected, you should now see 2 scanner icons in the New Document toolbar. The icon on the left will enable you to scan one or more pages into Xtender:



When you select the left scanner icon, your scanner will begin scanning operations. While the scanner is operating, you will see the following message display:



The screenshot displays the opentext ApplicationXtender interface. At the top, the header shows 'opentext | ApplicationXtender - BANXE' and a user profile 'TEST'. Below the header, the breadcrumb 'B-S-ADMN > New Document' is visible. The main area is divided into two sections. On the left, a document viewer shows three pages, each with an 'Error' icon. The central pane displays a document page with text and a calendar icon. On the right, a metadata form is open, titled 'Text; Key Reference'. The form contains the following fields: ID (with a red border), PIDM, DOCUMENT TYPE (dropdown), LAST NAME, FIRST NAME, SSN, BIRTH DATE (with a calendar icon), TERM CODE (dropdown), APPLICATION NUMBER, ADMISSIONS REQUIREMENT (dropdown), INSTITUTION NUMBER, ROUTING STATUS (dropdown), ACTIVITY DATE (with a 'Timestamp' button), VPD_CODE, DISPOSITION DATE (with a calendar icon), DOCCATEGORY (dropdown), and RECRUITER ID. At the bottom right of the form are 'CANCEL' and 'SAVE' buttons.

Enter INDEX data and click Save.

