## Banner Document Management/ApplicationXtender – Retrieving Documents

Login to Banner, you can get to the ApplicationXtender app by clicking on the magnifying glass icon on the toolbar.

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Version 8.1.172.0 to 2016 EMC Corporation	) All Rights Reserved.							

Sign in with Banner UserID and password.

If you want the Full Text Search option. Check the Request Full Text Search Support prior to logging in.

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The wildcard for search is an asterisk in this software, not a percent sign like it is in banner. The screen featured above is SPAIDEN, but the search button is also present in other Banner screens. Your search results change depending on what screen you are in (because that changes the context of your search).

For example, being in SAAADMS in the admissions checklist and having a single field highlighted, will change the search criteria to look for documents related to that specific field when you click the search

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icon in the toolbar. This will open a query screen with the search criteria already populated.

Click on the Application that you would like to open, B-S-ADMN, for example. At this point you can enter an ID or other information to search for documents.

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If you query from INB for a particular student, you will get a list of queries. You can toggle or reorder fields by clicking the gear in the top right.

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You can even search by a term code and docment type and it will give you transcripts from that term from multiple students.

This program can record different file types, including excel and word documents.

You can also do a full text search and enter keywords. It's likely that our old imagio documents will be submitted to full text indexing because there are likely to be indexing issues. These text search functions can be found at the bottom of the general query criteria screen. It will retrieve and document that includes the keyboards that you have selected (if the document was submitted to full-text indexing). Once you open the desired document you have the option to open it in its original format.

You can also search for a record by pressing the + button on the top right to open up a menu that includes New Query, New Multi-Application Search, New Report Search.



## Queries

**New Query** re-opens up the previous screen that first opened when you selected your application (e.g. B-S-ADMN).

**New Multi-Application Search** allows you to search multiple applications on the left hand side. This will be useful when looking for student data in both the current system and older documents from imagio.

## Query Results

You can sort by column headers, and if you click the drop down menu on each record, you get a menu of options.



When looking at a record, you can return to Query Results from the breadcrumb menu or you can go to the next/previous record from the query list.



Once a document is deleted, it can't be recovered. Delete access is restricted.

Export Cold means export to text.

## **User Settings**



To change your settings, select your username in the top right and a drop down menu will appear with the "User Settings" Option.

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In the Search/Result Set you can modify how the software displays your search results and how your results are exported. For example, you can choose to export documents as CSV files if you do data work.

"Auto Open Document if Query Yields One Result" is checked by default.

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