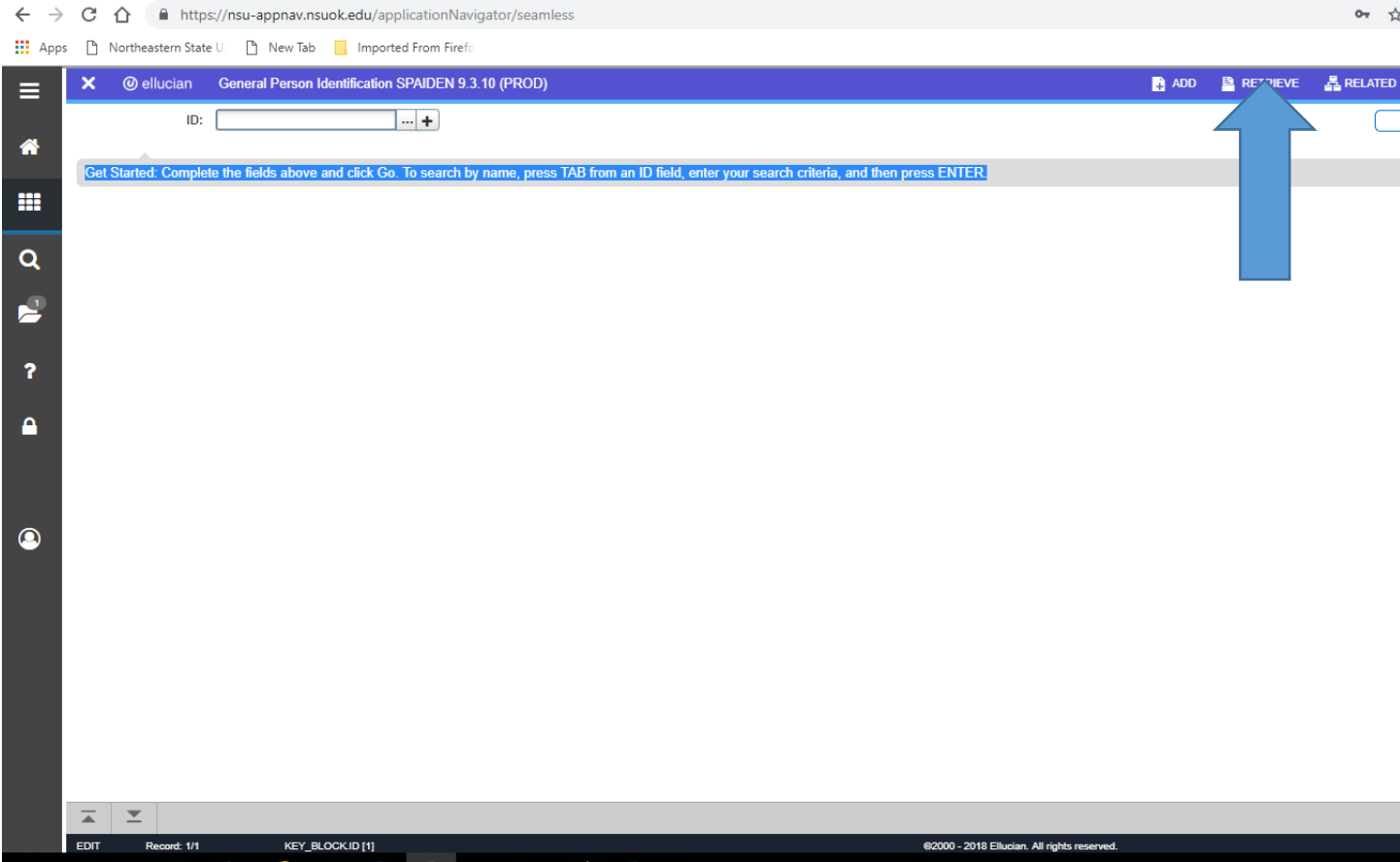
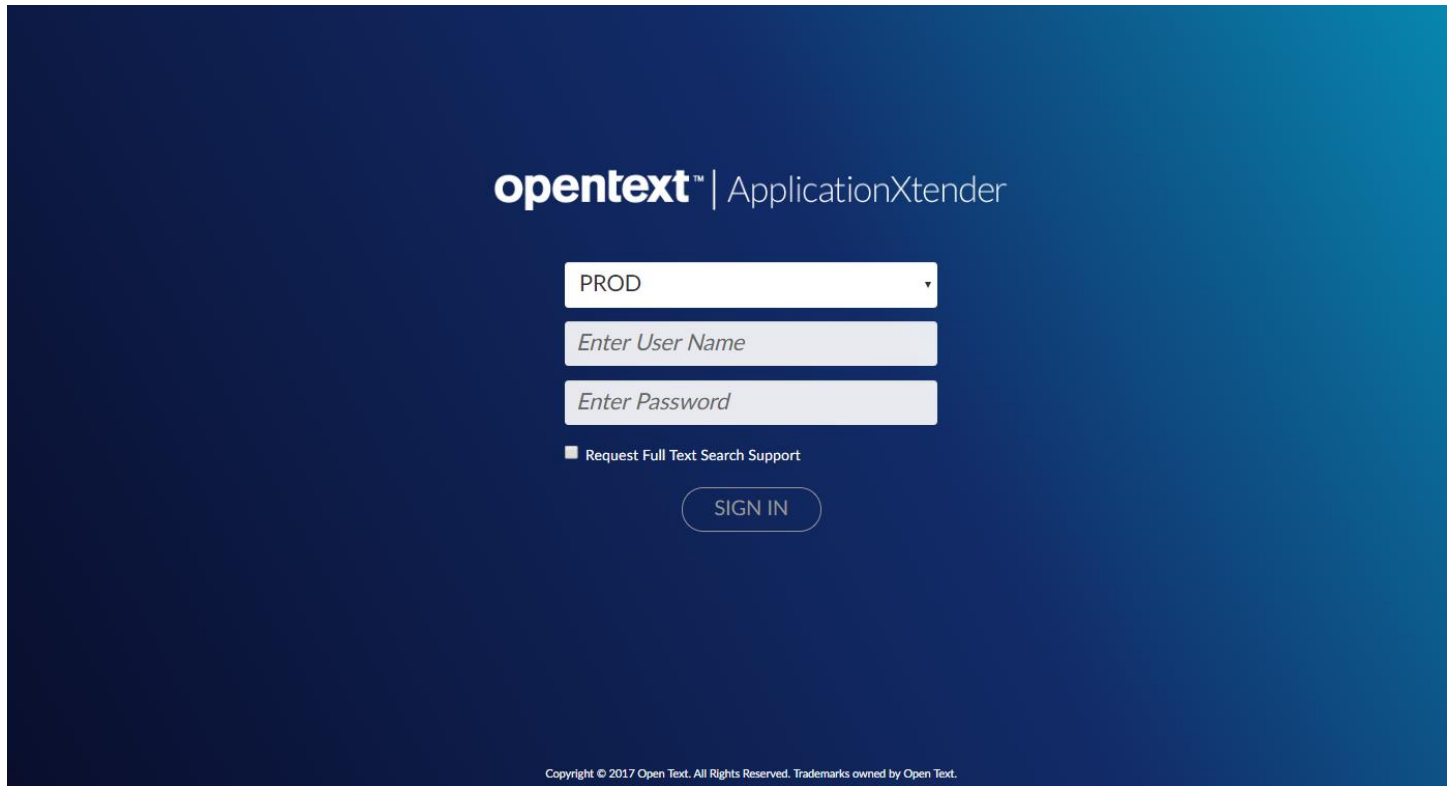


# Banner Document Management/ApplicationXtender – Retrieving Documents

Login to Banner, you can get to the ApplicationXtender app by clicking on the Retrieve button on the toolbar.



Or go to website: <https://nsut-bdm-web.nsuok.edu/AppXtender/DataSources/PROD/account/login>



**opentext™** | ApplicationXtender

PROD ▾

*Enter User Name*

*Enter Password*

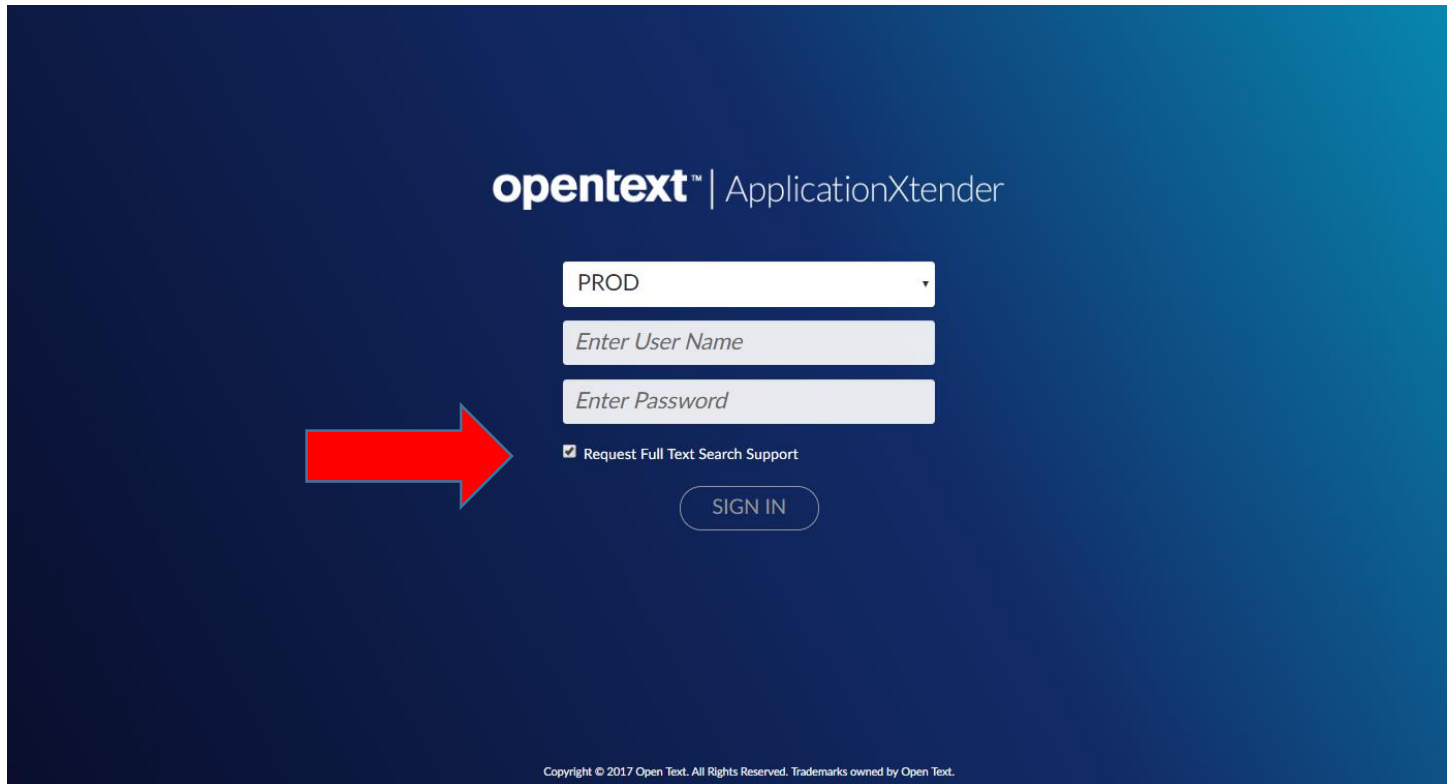
Request Full Text Search Support

SIGN IN

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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.



opentext™ | ApplicationXtender

PROD

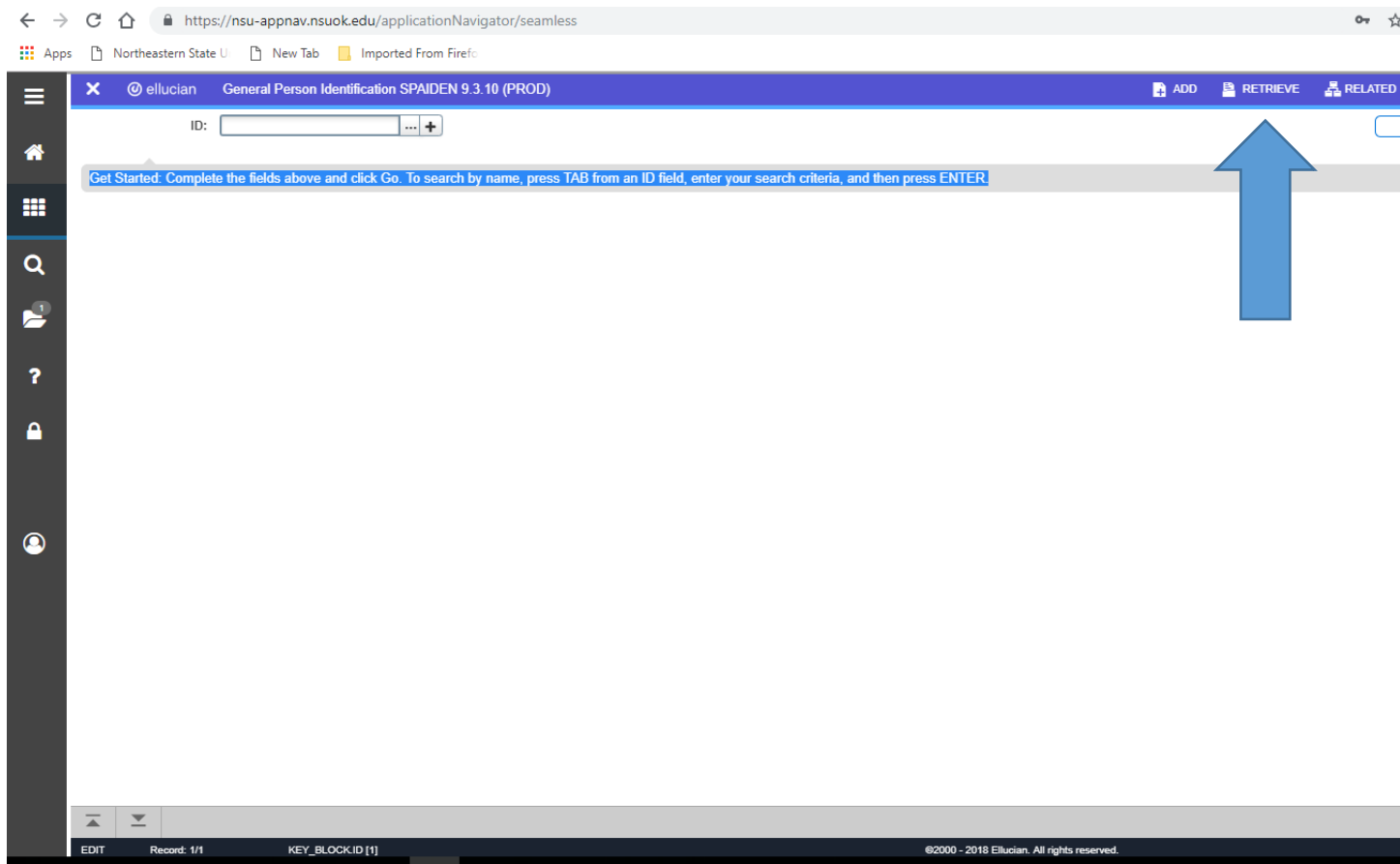
Enter User Name

Enter Password

Request Full Text Search Support

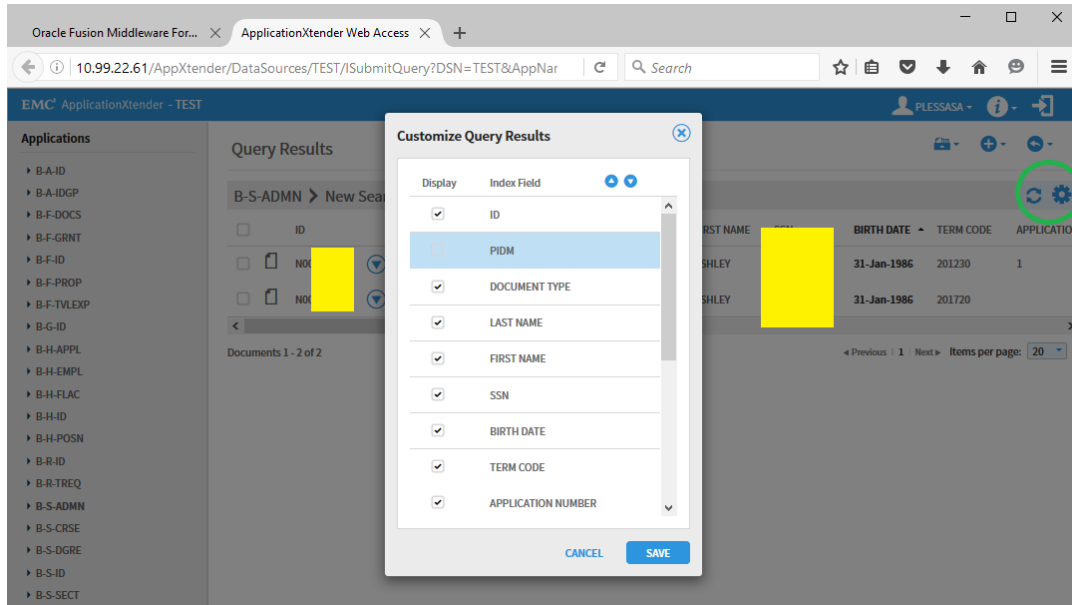
SIGN IN

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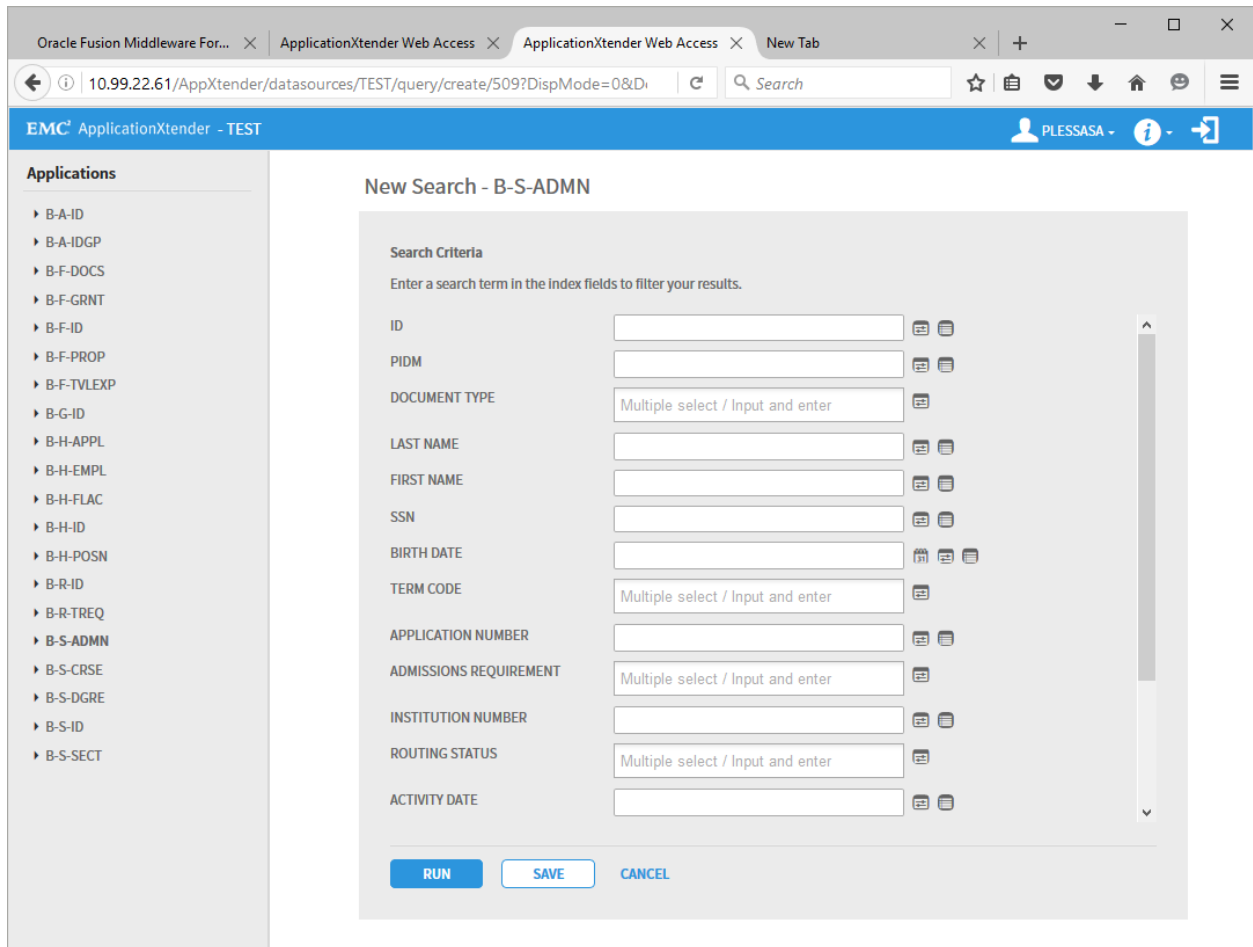


The wildcard for search is an asterisk in this software, not a percent sign like it is in banner. The screen featured above is SPAIDEN, but the search button is also present in other Banner screens. Your search results change depending on what screen you are in (because that changes the context of your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

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.



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.

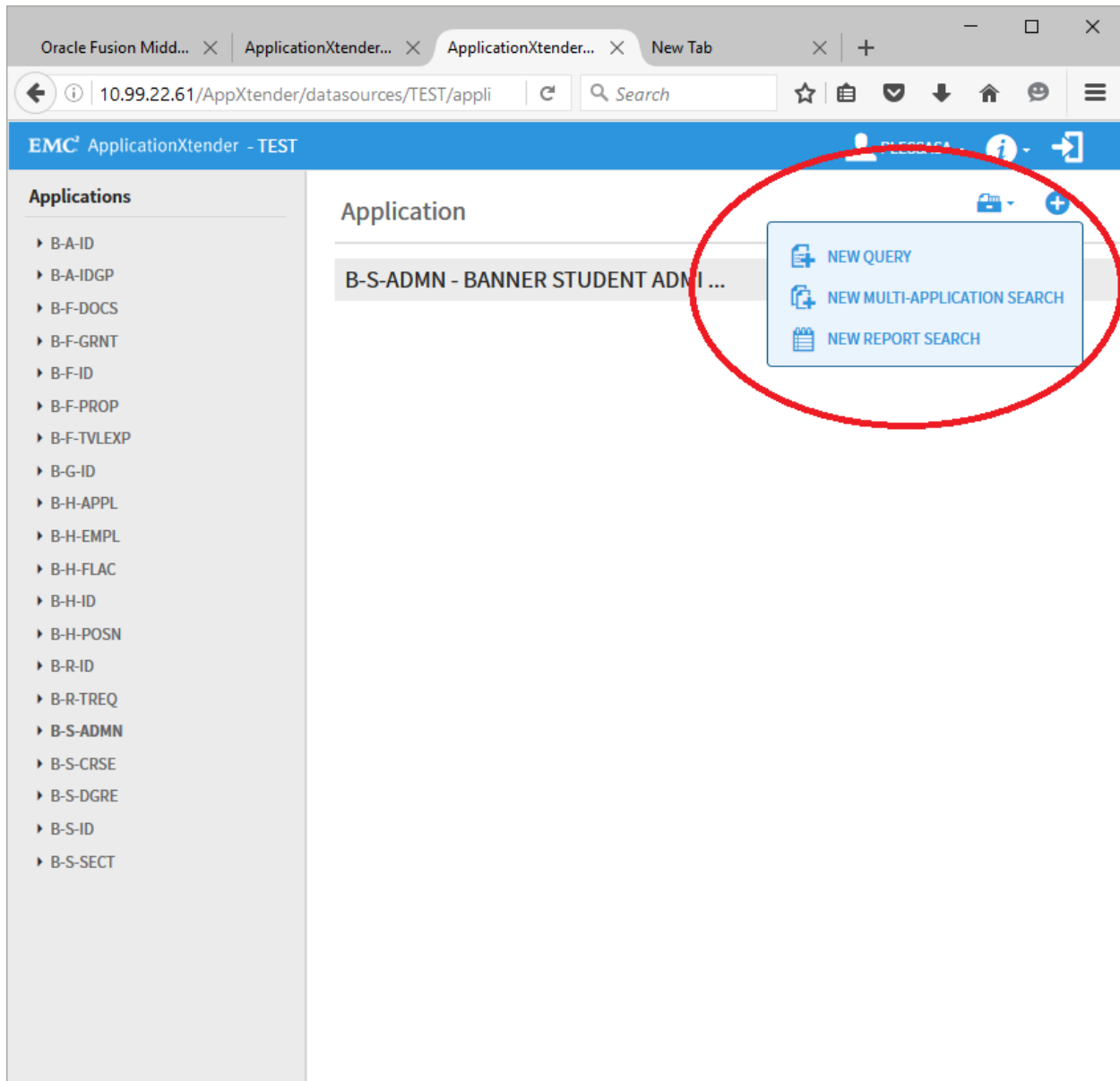


You can even search by a term code and document type and it will give you transcripts from that term from multiple students.

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

You can also do a full text search and enter keywords. The text search functions are at the bottom of the general query criteria screen. 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.

The screenshot shows the Oracle Fusion Middleware ApplicationXtender interface. The browser address bar displays the URL: 10.99.22.61/AppXtender/DataSources/TEST/ISubmitQuery?DSN=TEST&AppNar. The page title is "EMC ApplicationXtender - TEST". The user is logged in as PLESSASA.

The "Applications" sidebar on the left lists various application categories, including B-A-ID, B-A-IDGP, B-F-DOCS, B-F-GRNT, B-F-ID, B-F-PROP, B-F-TVLEXP, B-G-ID, B-H-APPL, B-H-EMPL, B-H-FLAC, B-H-ID, B-H-POSN, B-R-ID, B-R-TREQ, B-S-ADMN, B-S-CRSE, B-S-DGRE, B-S-ID, and B-S-SECT.

The main content area is titled "Query Results" and shows a search path: "B-S-ADMN > New Search > Query Results". A table displays the results:

ID	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE	TERM CODE	APPLICATION NUMBER	ADMIS
[REDACTED]	COLLEGE TRNSCRT	PL [REDACTED]	ASHLEY	[REDACTED]	[REDACTED]	201230	1	CLT1
[REDACTED]		PL [REDACTED]	ASHLEY	[REDACTED]	[REDACTED]	201720		TOEF



A context menu is open over the first record, showing the following options: OPEN, PRINT, EMAIL, DELETE, EXPORT COLD, and SUBMIT OCR JOB. The page also shows "Documents 1 - 2 of 2" and a pagination control with "Items per page: 20".








You can also hide column headers by clicking on the cog wheel located near the top of the page as marked by the red circle.



### Query Results

NSU-BURSAR > New Search > Query Results

<input type="checkbox"/>	ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE	ROUTING STATUS	ACTIVITY DATE	VPDI_CODE	DISPOSITION
<input type="checkbox"/>	 [REDACTED]	89645	MANUAL CREDIT	GAY	CHRISTOPHER	[REDACTED]	04-Aug-1988		2018-09-27 13:42:36		
<input type="checkbox"/>	 [REDACTED]	89645	MANUAL CREDIT	GAY	CHRISTOPHER	[REDACTED]	04-Aug-1988		2018-09-11 14:48:50		
<input type="checkbox"/>	 [REDACTED]	89645	MANUAL CREDIT	GAY	CHRISTOPHER	[REDACTED]	04-Aug-1988		2018-08-17 14:48:53		
<input type="checkbox"/>	 [REDACTED]	89645	MANUAL CREDIT	GAY	CHRISTOPHER	[REDACTED]	04-Aug-1988		2018-04-05 08:22:39		
<input type="checkbox"/>	 [REDACTED]	89645	MANUAL CREDIT	GAY	CHRISTOPHER	[REDACTED]	04-Aug-1988		2018-03-13 11:39:19		
<input type="checkbox"/>	 [REDACTED]	89645	MANUAL CREDIT	GAY	CHRISTOPHER	[REDACTED]	04-Aug-1988		2018-03-02 08:46:42		
<input type="checkbox"/>	 [REDACTED]	89645	ID OFFICE MISC	GAY	CHRISTOPHER	[REDACTED]	04-Aug-1988		2017-10-27 14:15:22		
<input type="checkbox"/>	 [REDACTED]	89645	MANUAL CREDIT	GAY	CHRISTOPHER	[REDACTED]	04-Aug-1988		2017-10-26 15:57:34		

Documents 1 - 8 of 8








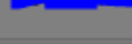
◀ Previous | 1 | Next ▶ Items per page: 100

Under Display you can decide which columns appear and which ones to hide. A check mark in the box will make appear and removing the check will hide the column.

For this example we will be removing the Social Security number column or SSN.

Query Results

NSU-BURSAR > New Search > Quer

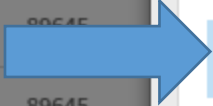
<input type="checkbox"/>	ID	PIDM
<input type="checkbox"/>		89645
<input type="checkbox"/>		89645
<input type="checkbox"/>		89645
<input type="checkbox"/>		89645
<input type="checkbox"/>		89645
<input type="checkbox"/>		89645
<input type="checkbox"/>		89645
<input type="checkbox"/>		89645

Documents 1 - 8 of 8

### Customize Query Results

Display	Index Field
<input checked="" type="checkbox"/>	ID
<input checked="" 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 checked="" type="checkbox"/>	BIRTH DATE
<input checked="" type="checkbox"/>	ROUTING STATUS
<input checked="" type="checkbox"/>	ACTIVITY DATE

















CANCEL SAVE



Now you can see that we no longer have the Social security column appearing.

## Query Results

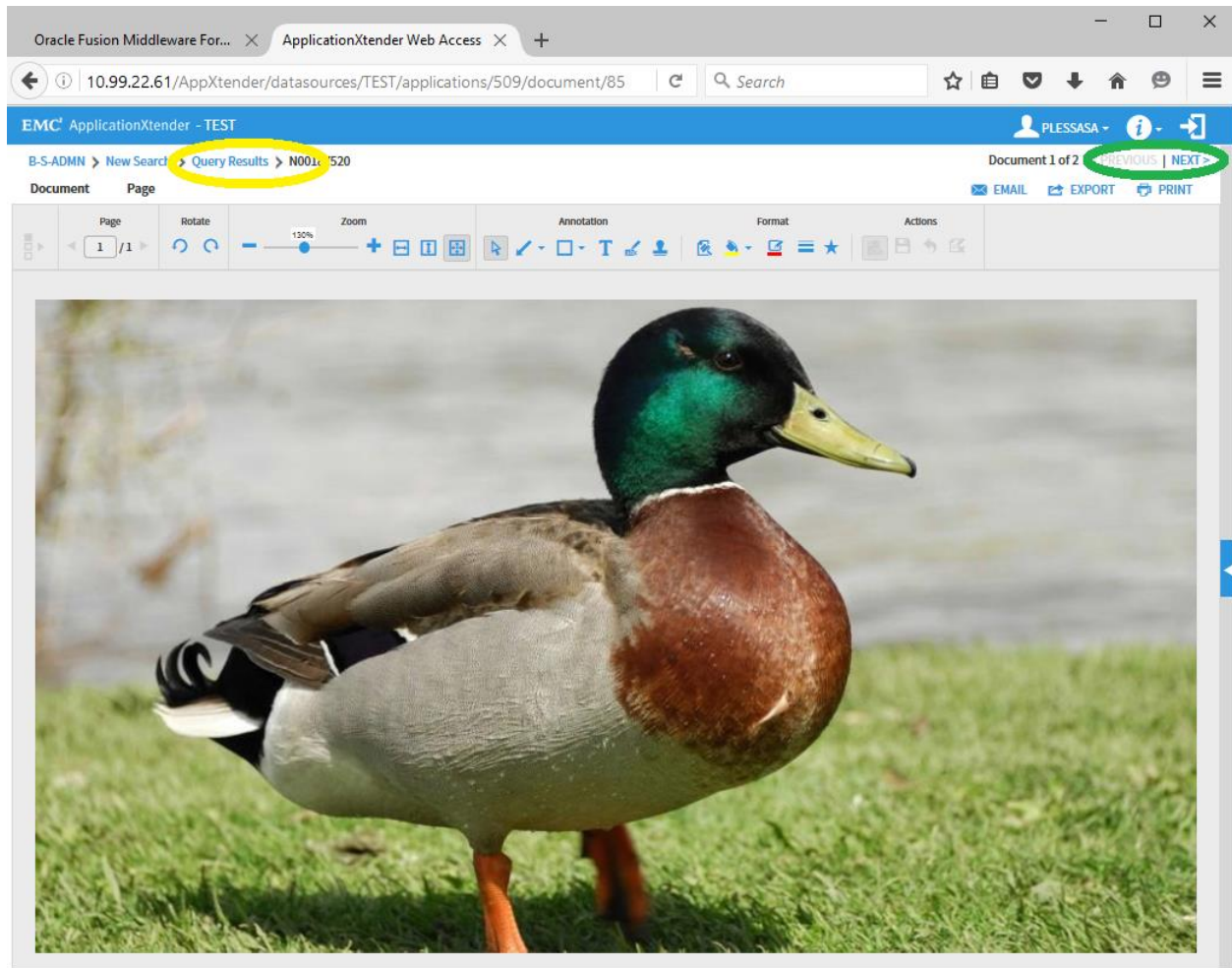
NSU-BURSAR > New Search > Query Results

<input type="checkbox"/>	ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	BIRTH DATE	RO
<input type="checkbox"/>	 	89645	MANUAL CREDIT	GAY	CHRISTOPHER	04-Aug-1988	
<input type="checkbox"/>	 	89645	MANUAL CREDIT	GAY	CHRISTOPHER	04-Aug-1988	
<input type="checkbox"/>	 	89645	MANUAL CREDIT	GAY	CHRISTOPHER	04-Aug-1988	
<input type="checkbox"/>	 	89645	MANUAL CREDIT	GAY	CHRISTOPHER	04-Aug-1988	
<input type="checkbox"/>	 	89645	MANUAL CREDIT	GAY	CHRISTOPHER	04-Aug-1988	
<input type="checkbox"/>	 	89645	MANUAL CREDIT	GAY	CHRISTOPHER	04-Aug-1988	
<input type="checkbox"/>	 	89645	ID OFFICE MISC	GAY	CHRISTOPHER	04-Aug-1988	
<input type="checkbox"/>	 	89645	MANUAL CREDIT	GAY	CHRISTOPHER	04-Aug-1988	

<

Documents 1 - 8 of 8

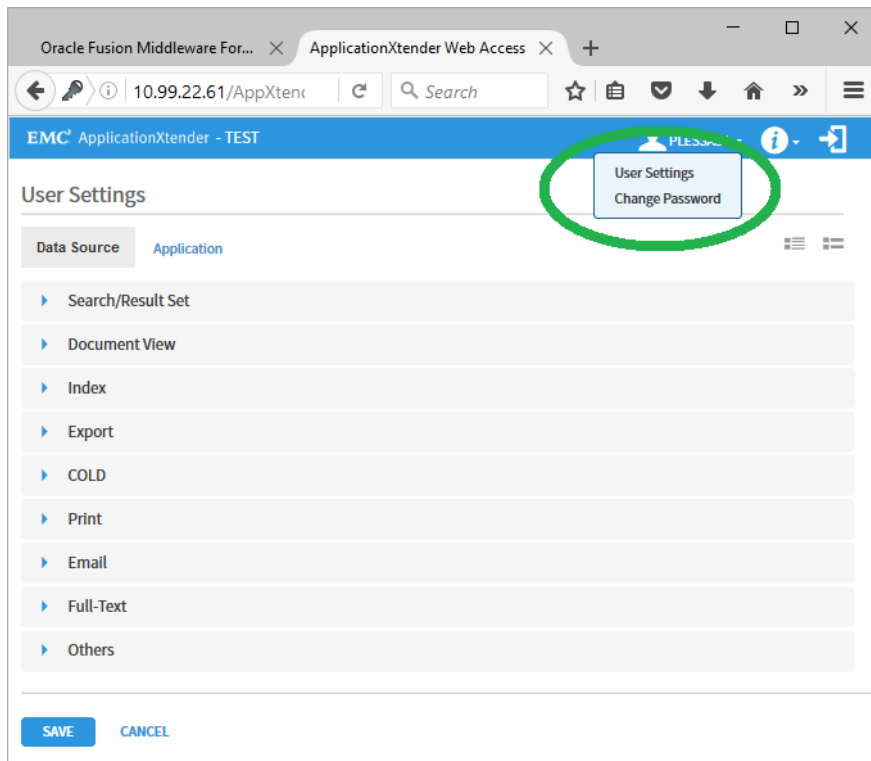
When looking at a record, you can return to **Query Results** from the breadcrumb menu or you can go to the **next/previous** record from the query list.



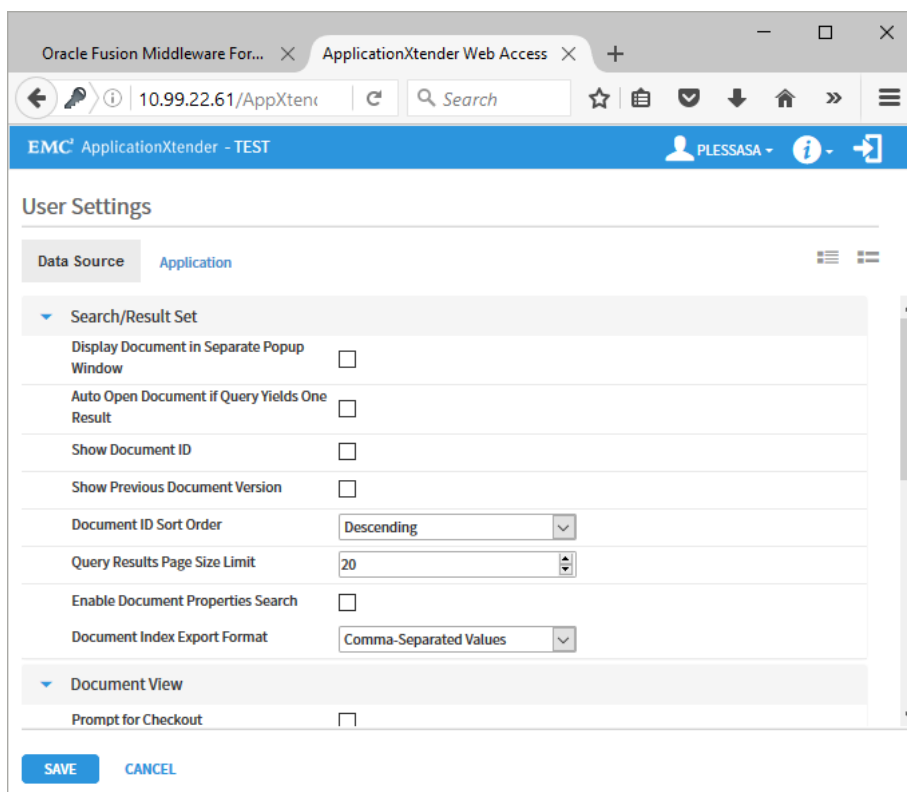
Once a document is deleted, it can't be recovered. Delete access is restricted.

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.



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.

## User Settings

**Data Source** Application ☰ ☱

▶ Search/Result Set

▼ Document View

Prompt for Checkout	<input type="checkbox"/>
Show Page Thumbnails	<input checked="" type="checkbox"/>
Enable Inline Rendering of Foreign Files	<input checked="" type="checkbox"/>
Use Browser to Display PDF Files	<input checked="" type="checkbox"/>
Use Browser to Display Secured PDF Files	<input type="checkbox"/>
Enable Inline Viewing of PDF Files	<input checked="" type="checkbox"/>
View Native Images	<input type="checkbox"/>
The Number of Pages to Pre-render	<input type="text" value="1"/>

▶ Index

▶ Import

▶ Export

▶ COLD

▶ Print

▶ Email

▶ Full-Text

▶ Others

**SAVE** CANCEL

Browser tabs: Ellucian ..., Welcome..., 401 - Unauth..., Banner Launc..., Oracle Fusion..., Applicati..., Oracle Fusion...

Address bar: 10.99.22.61/AppXtender/datasources/TEST/userProfile/0?lqid= Search

Page Title: EMC ApplicationXtender - TEST

User: RATLIJIM

### User Settings

**Data Source** Application

- Search/Result Set
- Document View
- Index
  - Show Index View
  - Check for Matching Index
  - Enable Dual Data Entry
  - Ignore Datestamp
  - Display Batch in Separate Popup Window
- Export
- COLD
- Print
- Email
- Full-Text
- Others
  - Home Page

**SAVE** CANCEL

EMC ApplicationXtender - TEST

### User Settings

Data Source Application

Print

Print Original Size	<input type="checkbox"/>
Fit to Page	<input checked="" type="checkbox"/>
Print DPI	150
COLD Form Overlay for Print	Image
Page Size / Paper Size	Letter - Portrait
Page Width (Inches)	8.5
Page Height (Inches)	11
Page Margin - Top and Bottom (Inches)	0.1
Page Margin - Left and Right (Inches)	0.1
Endorse Printed Pages	<input type="checkbox"/>
Endorsement Position	LeftTop
Endorsement Text (Maximum of 70 characters)	
Page Fetch Retry Enabled	<input checked="" type="checkbox"/>
Page Fetch Retry Count (1-10)	5
Show Print Log	<input type="checkbox"/>

SAVE CANCEL



Browser tabs: Ellucian ..., Welcome..., 401 - Unauth..., Banner Launc..., Oracle Fusion..., Applicati..., Oracle Fusion...

Address bar: 10.99.22.61/AppXtender/datasources/TEST/userProfile/0?lqid=

Page Title: EMC ApplicationXtender - TEST

### User Settings

**Data Source** Application

- Search/Result Set
- Document View
- Index
- Export
  - Use PDF Format if Possible
  - Black and White Images TIFF
  - 4-bit or 8-bit Color Images GIF
  - True-Color Images JPEG
  - JPEG Quality Factor 94
  - Text  Image
  - Use Multipage Files
  - Export in Archived Format
  - COLD Form Overlay for Export Image
- COLD
- Print
- Email
- Full-Text

**SAVE** CANCEL

EMC ApplicationXtender - TEST

### User Settings

Data Source Application

- Print
- Email
  - Use PDF Format if Possible
  - Use XPS Format if Possible
  - Black and White Images
  - 4-bit or 8-bit Color Images
  - True-Color Images
  - JPEG Quality Factor
  - COLD Form Overlay for Email
  - Display Text as  Text  Image
  - Use Archive File Format
  - Use Multipage Files
  - Send Attachments as Hyperlinks
  - Merge Selected Documents into One
  - Mail Message Format  Text  HTML
  - Client Email Format  MSG  EML
- Full-Text

SAVE CANCEL

Browser tabs: Ellucian ..., Welcome..., 401 - Unauth..., Banner Launc..., Oracle Fusion..., Applicati..., Oracle Fusion...

Address bar: 10.99.22.61/AppXtender/datasources/TEST/userProfile/0?lqid=

Page Title: EMC ApplicationXtender - TEST

User: RATLIJM

### User Settings

**Data Source** Application

- Search/Result Set
- Document View
- Index
- Export
- COLD
- Print
- Email
- Full-Text
  - Enable Full-Text Search
  - Thesaurus
  - OCR Language English
  - Prompt Submitting Full-Text Index/OCR Dialog
- Others
  - Home Page Application Page

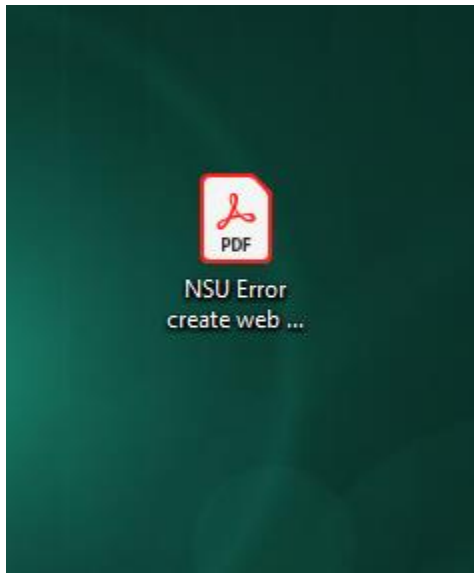
**SAVE** **CANCEL**

## Drag and Drop

Another way to scan or input document that is new to Banner Document Management is “Drag and Drop”. Make sure the settings in the document view are set up to “Enable Inline Rendering of Foreign Files and Use of Browser” to “Display PDF Files”.

To Drag and Drop document you will click and hold on the file you wish to input. There are several ways to drag and drop the files:

- Move it to screen where the applications are
- Move it to the thumbnail side of the scanning page as marked by the arrow below. Then unclick
- Move to the body of the screen



ApplicationXtender Wel x Welcome to ApplicationXte "Waiting for response from Boston Radio - Now Playin

https://devt-bdm-web.nsuok.edu/AppXtender/datasources/PPRD2/applications/516

opentext | ApplicationXtender - PPRD2 RATLIFJM

Applications

- \_RSTAMP
- B-A-ID
- B-A-IDGP
- B-F-DOCS
- B-F-GRNT
- B-F-ID
- B-F-PROP
- B-F-TVLEXP
- B-G-ID
- B-H-APPL
- B-H-EMPL
- B-H-FLAC
- B-H-ID
- B-H-POSN
- B-R-ID
- B-R-TREQ
- B-S-ADMIN
- B-S-CRSE
- B-S-DGRE
- B-S-ID
- B-S-SECT
- NSU-BURSAR
- NSU-CASHIERS
- NSU-COLLECTIONS
- NSU-EXPENSE-REPORTS
- NSU-LEGACY-ACCOUNTING
- NSU-LEGACY-ADMISSIONS
- NSU-LEGACY-AP
- NSU-LEGACY-AR
- NSU-LEGACY-FINANCIAL-AID
- NSU-LEGACY-PAYROLL
- NSU-LEGACY-PURCHASING
- NSU-PERKINS
- NSU-UTILITIES
- NSU-VAULT-TRANSCRIPTS

NSU-BURSAR - NSU BURSAR

NEW QUERY NEW DOCUMENT NEW BATCH MANAGE BATCHES

Recently Created Documents

Document Title	Created Time	Created By
N00090417	2019-02-08 11:44:50	RATLIFJM
N00090417	2019-02-08 10:05:23	RATLIFJM
N00090417	2019-02-08 10:00:51	RATLIFJM
N00119879	2019-02-08 09:57:53	RATLIFJM
N00119879	2019-02-07 15:58:38	RATLIFJM
N00119879	2019-02-07 13:56:32	RATLIFJM

PDF

↑

Drag the file to the middle of the screen of the application of where the document will be stored.

ApplicationXtender Wel x Welcome to ApplicationXt... "Waiting for response from Boston Radio - Now Playin... +

https://devt-bdm-web.nsuok.edu/appxtender/datasources/PPRD2/applications/516/newdoc/14151

opentext | ApplicationXtender - PPRD2

NSU-BURSAR > New Document

Page

11/28/2018 Create Web Departmental Deposit

### Create Web Departmental Deposit

There was an error validating the detail codes and/or the fnapals string(s). Please review any highlighted areas for errors.

**Template**

Select Template

Use Template

**Enter Credit Information**

Index Lookup	Detail Code	Amount	Description	Coas	Index	Fund	Orgn	Acct	Prog	Actv
	GLCH	0.01								

Add Row

Permission denied! Use of detail code GLCH is restricted.

**Enter Debit Information**

Tender Type: Electron Fund Transf

Amount: 0.01

Detail Code: EFTS

Add Row

**Deposit Description**

Deposit Description:

**Calculated Totals**

Right sidebar: ID, PIDM, DOCUMENT TYPE, LAST NAME, FIRST NAME, SSN, BIRTH DATE, ROUTING STATUS, ACTIVITY DATE (Timestamp), VPDI\_CODE, DISPOSITION DATE, TRANSACTION DATE. CANCEL SAVE

The index files will come up so you can fill them in.



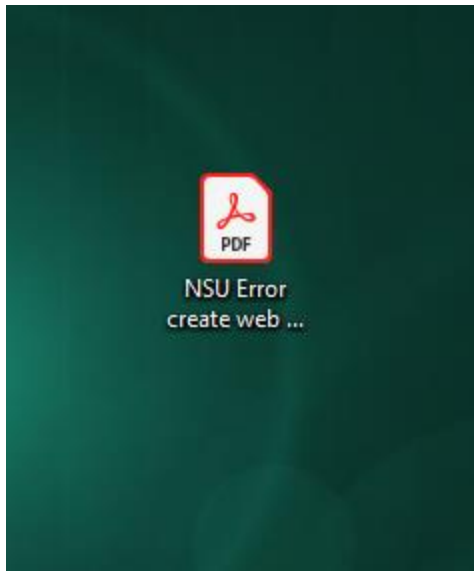
Add the pages in the file to be indexed.

The screenshot displays the OpenText ApplicationXtender interface. At the top, the header shows "opentext ApplicationXtender - PPRD2" and the user "RATLIJEM". Below the header, the breadcrumb navigation reads "NSU-BURSAR > Uploaded Batches > Example". The main workspace is divided into three sections:

- Left Panel:** A vertical list of document pages labeled "Page 1", "Page 2", and "Page 3". A large blue arrow points upwards from the bottom of this panel, indicating the direction of the index files mentioned in the caption.
- Center Panel:** A document viewer showing a page with text and a screenshot of a "User Settings" dialog box. The text includes instructions for installing Caplio Cloud runtime and configuring user settings.
- Right Panel:** A metadata form with fields for: ID, PIDM, DOCUMENT TYPE (dropdown), LAST NAME, FIRST NAME, SSN, BIRTH DATE (calendar icon), ROUTING STATUS (dropdown), ACTIVITY DATE (dropdown with "Timestamp" selected), VPDI\_CODE, DISPOSITION DATE (calendar icon), and TRANSACTION DATE (calendar icon). At the bottom right of this panel are "CANCEL" and "SAVE" buttons.

The index files will come up so you can fill them in.





ApplicationXtender Wel x Welcome to ApplicationXte "Waiting for response from Boston Radio - Now Playing +

https://dev-bdm-web.nsuok.edu/AppXtender/datasources/PPRD2/applications/516/document/14142

opentext | ApplicationXtender - PPRD2

NSU-BURSAR > N00119879

Document Page

Text Search EMAIL EXPORT PRINT

Page 1 / 3 Scanner Rotate 50% Zoom Annotation Format Actions

Page 1  
Page 2  
Page 3

International Travel - This is an international itinerary. Please use the link for the proper documentation and health requirements for you to enter these countries. [Click Here](#) or contact your company's preferred Passport/Visa provider.

US Borderlands Travel Ban - The Department of Homeland Security has advised passengers traveling from Cairo, Istanbul, Kuwait City, Doha, Qatar, Casablanca, Morocco, Amman, Jordan, Riyadh and Jordan Saudi Arabia, and Dubai and Abu Dhabi in the United Arab Emirates. Please check with your airfare agent regarding bringing devices larger than a cellphone, such as tablets, portable DVD players, laptops and cameras, into the main cabin. They must be checked baggage.

Download the WorldMobile™ app here [Click Here](#) Find vacation deals [Click Here](#)

Add online trip to calendar [Click Here](#) Traveler immunization [Click Here](#)

DOT announcement regarding aircraft cleanliness [Click Here](#)

Require a visa or passport for your upcoming trip? World Travel, Inc. has partnered with VisaIQ, a global leader in visa and passport services, to provide your application. To learn more or to start the application process, please visit the World Travel, Inc. application platform, located at [Click Here](#) or by sending an inquiry via email to [Click Here](#).

Federal law forbids the carriage of certain hazardous materials, such as aerosols, fireworks, and flammable liquids, aboard the aircraft. If you do not understand these restrictions, contact your airline or go to [Click Here](#) for clicking the link.

You may access your current reservation before or during your travel dates at [Click Here](#) by clicking the link.

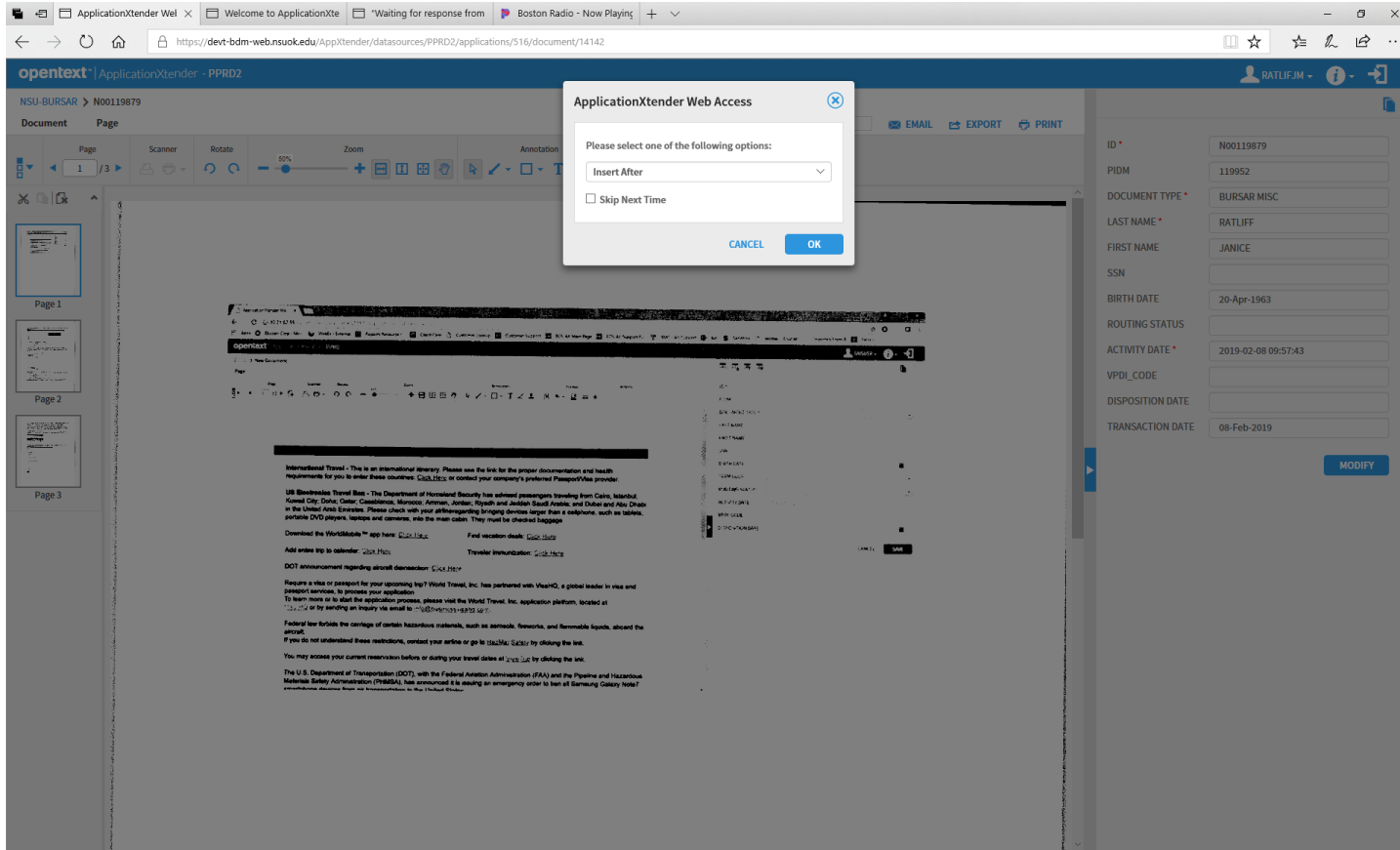
The U.S. Department of Transportation (DOT), with the Federal Aviation Administration (FAA) and the Pipeline and Hazardous Materials Safety Administration (PHMSA), has announced it is issuing an emergency order to ban all Samsung Galaxy Note7 smartphones from air transportation to the United States.

PDF

MODIFY

ID \* N00119879  
PIDM 119952  
DOCUMENT TYPE \* BURSAR MISC  
LAST NAME \* RATLIFF  
FIRST NAME \* JANICE  
SSN  
BIRTH DATE 20-Apr-1963  
ROUTING STATUS  
ACTIVITY DATE \* 2019-02-08 09:57:43  
VPDL\_CODE  
DISPOSITION DATE  
TRANSACTION DATE 08-Feb-2019

Once you have the documents you want pulled up and would like to add more to them you drag the documents in.



Select on the placement where to put the page. Fill in the index fields.