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AppXtender Web Access Introduction

Application Xtender Web Access is used to view documents held in BDMS. The documents that have been indexed can be accessed via Finance Self Service View Documents, directly through a web browser or the Banner System.

The document imaging program allows you to view information that has been scanned and indexed in Banner. Once the document has been indexed, it becomes associated with a series of documents in relationship to a banner Document ID such as student or staff account, financial account, requisitions, purchase order, check, invoice, etc.

Finance will be attaching images to the following types of documents when available:

- Invoice
- Journal Voucher
- Purchase Order
- Requisition

It is strongly recommended to use Finance Self Service “View Documents” to access/view a document that has been indexed.
Synchronizing Your Password

Banner and document imaging are directly connected but can be used independently. You will need to synchronize your Web Access password with your Banner password. **The following steps will only have to be done the first time you sign on to Web Access.**

*Note: Be sure your pop-up blocker is Disabled or set to allow pop-ups from the following site.*

1. Log into Banner using the following URL:
   https://banweb.eku.edu/forms/frmservlet?config=prod

2. Enter username and password in Banner Logon screen

   ![Banner Logon Screen](image)

   **Username:**
   **Password:**
   **Database:**

   ![Connect and Cancel Buttons](image)

   3. Click Connect button to enter Banner

   4. Click on Banner XtenderSolutions icon

   ![Banner XtenderSolutions Icon](image)

   5. **The following message will appear on the screen**

      ![Banner Message](image)

      Your BXS password has been automatically synchronized with your Banner password. You must use your Banner password if you wish to access AX / WX directly.

      ![OK Button](image)
6. Click **OK**

7. Click on the **Key** to logout

Your Password has been synchronized with your Banner account. Depending on what Banner form/field that you choose to synchronize you may receive a message that you do not have access to a particular Xtender application or that no document was found. Either way it is ok. Your password has been synchronized.
Accessing AppXtender Web Access (EKU Direct Finance Self Service “View Document”)

1. Visit it.eku.edu and login to EKUDirect at the top of the page.

2. Click on Login to EKUDirect

3. Enter your User ID and Pin number in the corresponding fields, then click Login

   User ID: 
   PIN: 

   Login  Forgot PIN?

4. From the Main Menu, click Finance Self-Service at the bottom of the page or Finance tab at the top of the page to access Banner Finance Self Service Menu
5. From the Finance Menu, click on **View Document**

6. Choose Type, Enter Document Number, click View document
7. If a “Display Documents” icon is displayed then an image/images has been attached to the document.

8. Click on Display Documents icon images will appear
9. Navigate to the previous/next page icons on the toolbar
   - Previous Page
   - Next Page

You may also click on the thumbnails if available to view next page

10. When you are done viewing the images click on the “X” under File on the left hand side of the page do NOT click on the X on the right top corner of the page.
Accessing AppXtender Web Access (URL Address)

To log into AppXtender Web Access using a URL:

1. Log into AppXtender Web Access using URL:
   
   http://bdms-app-prod/AppXtender/Login.aspx

   *This link can also be found on EKU BANWEB page http://banweb/*

2. The Application Xtender Web Access login will appear. Enter your Banner user name and password.

   ![Application Xtender Web Access Login](image)

   **Login**

   Welcome to Application Xtender Web Access, please provide your user name and password:

   - Data Source: PROD
   - User Name
   - Password
   - [Request Full Text Search Support]

   ![Login Button](image)

   ![Login](image)

3. Click Login

4. The Application screen will display. Your screen may contain different application folders based on your role and access privileges.

   ![Application Screen](image)
Accessing AppXtender Web Access (Banner System)

BDMS icon has been added to the Banner toolbar (Display Document Icon). This icon allows a user to open ApplicationXtender from within Banner toolbar and execute queries. It also allows auto querying of object on the location of your cursor within a Banner form.

FOIDOCH – Document History has been setup to access the following document types:

- INV - Invoice
- PO - Purchase Order
- REQ - Requisition

To log into AppXtender Web Access from Banner:

1. Log into Banner using the following URL:
   https://banweb.eku.edu/forms/frmservlet?config=prod

2. Enter username and password in Banner Logon screen

3. Click Connect

4. Navigate to the FOIDOCH (Document History) Form

5. Enter Document Type

6. Enter Document Code

7. There are several ways to access the image on this form:
   - Document Code
• Requisition ID
• Purchase Order ID
• Invoice ID

Highlight one of the areas

8. Click on Banner XtenderSolutions icon located on the toolbar

9. If Document ID has an image indexed will receive the following:

10. If the document does NOT have an image indexed to it the following message will appear.
If you are not within a form and click the XtenderSolutions icon a message will return “Document Not Found”. Click OK to query more results.

11. If you do not have Fund/Org access you will receive the following message:

Click on the icon to close window.
Closing AppXtender Web Access

When you are ready to exit AppXtender Web Access program, you will want to use the logoff command to cleanly exit the program.

1. Click on the Logoff icon

Or

Click on the Menu Bar, select File, then Logout

If you logoff using the X in the top right hand corner or if you try to open more than one session you will receive the following message.
AppXtender Web Access Basic Functions

**Viewing Previously Scanned Documents (New Query)**

1. Log into your Xtender Web Access account.

2. The following image is an example of the window that will open. Your view may be slightly different based on your role and permissions.

3. Right click on an application and select New Query

4. Enter the **search criteria** into the search value fields.
5. To run the query, click the Submit button.

6. The matching documents will be retrieved.

If there is more than one Banner Doc Type a listing will appear.

7. If more than one Banner Doc Type exist then Click on the Page Icon to view document.

8. The selected document should display.
Saving Queries

1. Follow steps 1-4 in Viewing Previously Scanned Documents (New Query)

2. Before running the query, save the query by entering the query name in the Query Name box and click on the Save button.

3. Proceed with steps 5-8 in Viewing Previously Scanned Documents (New Query).

4. The saved query will appear under the application that you ran the query. Double click on the query to run again or right click and choose Run Query.

Opening a Document in Read-Only Mode

You can open a document in read-only mode to view the document without modifying it.
**Editing Queries**

1. **Highlight** saved query and **right click**

   ![Query Editor Menu]

2. **Click on** **Edit**

3. The search values window will appear. **Change values**, click **save**, then select **submit**.

   ![Query Criteria Table]

   **Query Options**
   - Show: All Documents
   - Include previous document revisions

   **Save Options**
   - Query Name: TESTING QUERY SAVE
   - Available To All Users

   ![Submit, Save, Reset Buttons]
Deleting Queries

1. **Highlight** saved query and **right click**

   - Run
   - Edit
   - Delete
   - Properties...

2. **Click Delete**

3. **Click Yes** if a confirmation dialogue box appears.

Query Properties

The query properties dialogue box provides a means to rename a query and also to change the permissions.

1. **Highlight** saved query and **right click**

   - Run
   - Edit
   - Delete
   - Properties...

2. **Click Properties**

3. The Query Dialogue Box will be displayed

4. Alter the information as required
5. Click on the OK button to save the changes.

6. The new name of the query will appear in your saved queries

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**Menu Bar**

**File Menu**
- **Batch Import** - Used to create new electronic document batches
- **Logout** – Close Web Access session

**Edit Menu**
- **New Query** - Used to run queries on documents held within BMDS
- **User Setting** – Used to add/modfy your personal PC settings
**View Menu**
Used to Switch between Application and Batch Index (list) views

![View Menu Diagram]

**Help Menu**
Used to check status of installed software

![Help Menu Diagram]

**Shortcut Menu**
Used to provide quick access to commonly used functions

1. From Application View, **right click**

2. A menu of commonly required tasks will be displayed

   ![Shortcut Menu Example]

3. Use the left mouse click to select the required action