Basic Navigation in Xtender

http://imaging.texastech.edu

Xtender is used by Texas Tech University and Texas Tech University Health Sciences Center to scan in paper documents for easy accessibility. Documents scanned within Xtender are to be used for University purposes only.

This handout is intended for general users who need assistance in navigating and viewing documents within the Xtender system. This document will not go over how to scan into Xtender.

Security is set up on each individual user. Users are given access to only those folders, also known as applications that are needed for their job responsibilities. For example: A user within a department could require access to both the Student System and Human Resources records. Prior to gaining any access, the user must comply with the specific guidelines needed for each system. Xtender training is not required prior to gaining access. Refer to How to Gain Access to Xtender on requirements of each module.

This training guide is universal and works for all Modules, whether it is Student Records, Human Resource, Finance, and other miscellaneous folders within Xtender.

How to Gain Access to Xtender?

Student Records:
- All users must complete the FERPA workshop prior to gaining access to Xtender Student.
  - For those who have already completed Banner Student – Banner Basics and FERPA workshop, submit a BUG request to EAS for Xtender access.
  - For those who only need Xtender and not Banner, contact a representative in AFISM to set up a FERPA workshop.
    After the workshop is complete, the AFISM representative will submit the request for Xtender access.

Finance Records:
- Requests for access should be submitted in a BUG request to EAS
- The owner of the folder/application will submit approval to EAS
- Refer to this handout for instructions on how to submit a BUG request

Human Resource Records:
- Requests for access should be submitted in a BUG request to EAS
- The owner of the folder/application will submit approval to EAS
- Refer to this handout for instructions on how to submit a BUG request

Miscellaneous Academic Departments Records:
- Academic Departments across campus are utilizing Xtender in scanning their department’s documents into their own departmental folders. Access into the department’s folders must gain the appropriate permission prior to being granted access into those departments folder.
- Requests for access should be submitted in a BUG to EAS.
  - The owner of the folder/application will submit approval to EAS
  - Refer to this handout for instructions on how to submit a BUG request
How to Get Started?

1. Log into the Xtender URL
   a. http://imaging.texastech.edu
   b. **Do not use “www” in URL address

2. Log in using your current eRaider username and password

3. Once logged in, all **authorized folders** (also known as **applications**) will be listed.

![Authorized Folders]

Xtender Home Page

Below is an example of authorized folders (ex. Student) that could be displayed, depending on user’s security.

![Xtender Home Page]

To Pull-up a Record in a Folder

- **Highlight** and **Double Click** on the Folder, this will take you to the **Query Criteria** screen to start search.
To SEARCH for a Person’s Records

- On the Query Criteria Screen
- Select New Query (if not already selected)
- Enter in the Criteria to be searched in the Search Value fields (Name, ID#, Birth Date, etc)
- Then click the Submit button or Enter on keyboard

THE RESULT: All documents tied to the criteria entered will be displayed.

⚠️ Multiple names may be displayed if the search criteria were too broad and general.
If needed, narrow down your search.
To DISPLAY a Specific Document

**If this is your first-time to use Xtender, you may be prompt to install software. Refer to the end of this handout on how to install this software application.

Highlight & Double Click on the document to view.

THE RESULT: The document selected will be displayed.

Click the Query Results icon to go back to see all the documents

Hover: When the hand is displayed on the document, hold down the left button on your mouse then you can move the document up and down on the screen.
**How to NAVIGATE on the Document**

Below are some guidelines on the functions you have the option to do on the document you have selected.

**Refer to the “Document Icons” page located in this handout for additional information.**

<table>
<thead>
<tr>
<th>Function</th>
<th>Navigation</th>
<th>Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>To View Page 2 of this document</td>
<td>Click <strong>Next Page</strong> icon to view the additional pages of the document</td>
<td>![Next Page Icon]</td>
</tr>
<tr>
<td>To Zoom In (or Zoom Out) on the Document</td>
<td>Click on the <strong>Zoom In</strong> icon This will enlarge the document making it easier to read Note: Click on the <strong>Hover Hand</strong> to move the document on page, or click on the scroll bar on the bottom and side.</td>
<td>![Zoom In Icon]</td>
</tr>
<tr>
<td>To Rotate the Document</td>
<td>Click on <strong>Rotate Right</strong> (or <strong>Rotate Left</strong>) icon This will rotate the document to make it easier to read</td>
<td>![Rotate Right Icon]</td>
</tr>
<tr>
<td>To View the Next Set of Documents</td>
<td>Click on the <strong>Next Document</strong> (or <strong>Previous Document</strong>) Icon This will take you through the other documents on the person’s record</td>
<td>![Next Document Icon]</td>
</tr>
<tr>
<td>To View Query Results page</td>
<td>Click on <strong>Query Results</strong> icon This will take you back to the screen that displays all the documents under the person’s record</td>
<td>![Query Results Icon]</td>
</tr>
<tr>
<td>To Run a New Query</td>
<td>Click on the <strong>New Query</strong> Icon Enter new query criteria</td>
<td>![New Query Icon]</td>
</tr>
</tbody>
</table>
Need to SEARCH again?

1. To Start a **NEW Query**
   - Click on the New Query Icon
   - Repeat search steps

2. To **NARROW Down** the Search on the current Query:
   - Click on the Modify Query icon to the far right of page (scroll over if needed)
   - Enter in additional criteria in search value fields
   - Repeat search steps
### Xtender Navigation ICONS

<table>
<thead>
<tr>
<th>ICON</th>
<th>FUNCTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Logout Icon]</td>
<td>Logout</td>
<td>This function will <strong>Close and Log You Out</strong> of Xtender</td>
</tr>
<tr>
<td>![Application List Icon]</td>
<td>Application List</td>
<td>This function will take you back to the <strong>Home Page</strong></td>
</tr>
<tr>
<td>![Query Results Icon]</td>
<td>Query Results</td>
<td>This function will <strong>display all the results</strong> of the query you searched</td>
</tr>
<tr>
<td>![New Query Icon]</td>
<td>New Query</td>
<td>This function will take you to the Query Criteria form so you can do a <strong>new query search</strong>.</td>
</tr>
<tr>
<td>![Previous Document Icon]</td>
<td>Previous Document</td>
<td>This function will take you to the <strong>Next DOCUMENT</strong> on the person’s record. For example, the person has multiple documents under their name; this function will move you from Document to Document, NOT page to page within the document. <strong>Refer to Next Page and Previous Page on moving from page to page within the document under the Document Icons legend</strong></td>
</tr>
<tr>
<td>![Toggle Document Icon]</td>
<td>Toggle Document Thumbnail View</td>
<td>This function will display a thumbnail view of the documents. Click on icon to view <strong>Thumbnail view</strong>, and then click on icon to return to <strong>Full Page view</strong>. <strong>Note</strong>: This Thumbnail requires installation of the Microsoft Silverlight plug-in. Contact your IT support within your department or IT Help Desk.</td>
</tr>
</tbody>
</table>

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*Do not* click on the BACK and FORTH buttons on your WEB Browser. This could cause your Browser to expire. If you receive the message of **Webpage has Expired**, press the `<F5>` key to refresh your session and click **Retry**.
## Document ICONS

<table>
<thead>
<tr>
<th>ICON</th>
<th>FUNCTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="icon" /></td>
<td>Fit to Page</td>
<td>This will <strong>change the layout</strong> of the document on the screen</td>
</tr>
<tr>
<td><img src="image2" alt="icon" /></td>
<td>Fit Height</td>
<td></td>
</tr>
<tr>
<td><img src="image3" alt="icon" /></td>
<td>Fit Width</td>
<td></td>
</tr>
<tr>
<td><img src="image4" alt="icon" /></td>
<td>Rotate Left</td>
<td>This will allow you to <strong>rotate</strong> the document making it easier to view</td>
</tr>
<tr>
<td><img src="image5" alt="icon" /></td>
<td>Rotate Right</td>
<td></td>
</tr>
<tr>
<td><img src="image6" alt="icon" /></td>
<td>Zoom In</td>
<td>Zoom In will make the document <strong>larger</strong> and easier to read</td>
</tr>
<tr>
<td><img src="image7" alt="icon" /></td>
<td>Zoom Out</td>
<td></td>
</tr>
<tr>
<td><img src="image8" alt="icon" /></td>
<td>Next Page</td>
<td>Click on Next Page to look at all pages affiliated with this single document</td>
</tr>
<tr>
<td><img src="image9" alt="icon" /></td>
<td>Previous Page</td>
<td></td>
</tr>
<tr>
<td><img src="image10" alt="icon" /></td>
<td>Print Current Page</td>
<td><strong>Print Current Page:</strong> Will allow you to print a <strong>single</strong> page.</td>
</tr>
<tr>
<td><img src="image11" alt="icon" /></td>
<td>Print Document/PDF Print</td>
<td><strong>Print Document/PDF Print:</strong> Will allow you to print <strong>multiple</strong> pages within the document</td>
</tr>
<tr>
<td><img src="image12" alt="icon" /></td>
<td>Magnifier</td>
<td>This will allow a <strong>close up view</strong> of a portion of the document. You change the magnify view from 50 up to 400. To close the window, click on the “x” on the Magnifier pop-up window</td>
</tr>
</tbody>
</table>
Need to Email a Document from Xtender?

You can email up to 10 Megabytes of images from Xtender. Due to normal mail restrictions, larger files are not allowed. This means larger documents, usually 15+ pages, will not go through and you will receive an error message.

Steps to set up EMAIL in Xtender

The first time you attempt to email a document from Xtender, you will need to enter in your Email Address.

1. Enter in YOUR TTU.EDU or TTUHSC.EDU email address in the Email Address field, and then click OK.

2. At that time, you will receive an email notification with an Email Registration Code.

3. Copy and Paste, or manually type in the Email Registration Code in the Confirmation Code field, and then click OK.
To Email a SINGLE Document

1. Double Click and Open the Document
   - Go to the Document drop-down menu
   - Select Mail Document

2. Enter in the Person’s email that will receive the emailed document(s), and then click SEND.
   - The recipient will receive multi-page TIF file(s) that are viewable in Microsoft Picture, Windows Photo Viewer, Fax Viewer, or any other imaging software.

3. For a few moments the Status shows the email is being processed, and then it will change once the email was successfully sent.
To Email MULTIPLE Documents

Xtender gives you the ability to email multiple documents in a single email. Please keep in mind that Xtender is limited to about 15 pages in a single email.

1. On the Query Results screen, check the Radio Boxes next to the documents to be emailed.

2. Then click on the Email Selected Documents icon.

3. Enter in the “To” field the Person’s email that will receive the emailed document(s), and then click SEND.
   - The recipient will receive multi-page TIF file(s) that are viewable in Microsoft Picture, Windows Photo Viewer, Fax Viewer, or any other imaging software.

4. For a few moments the Status shows the email is being processed, and then it will change once the email was successfully sent.

This process could be used to email Single or Multiple Documents by clicking on a single Radio Box, or multiple Radio Boxes.
**First time to use Xtender?**

**For Internet Explorer (IE) browser:**
- If this is your first time using Xtender, or Xtender has been updated recently, you may be prompted to install new software.
- For assistance on installation of software, contact your IT support person or IT Help Desk.

**For all other Internet browsers:**
- Using other internet browser will have reduced functionality.
- Software installation is not required

**Internet Explorer (IE) software installation instructions:**

Disclaimer: The instructions below work for Internet Explorer (IE) and may look slightly different depending on the version you are using. If you have questions about installing the software, please contact your IT support person or IT Help Desk.

Right Click on notification and click “Install This Add-on” for all Users on This Computer”.

Click Install

*Depending on your computer set up on pop-up blockers, you may need to hold down the `<CTRL>` key while the software is installing.*
FAQs

Received a message of Webpage has Expired?
If you click on the Back and Forth button on your Web Browser, you could receive a message of “Webpage has Expired”.
Internet Explorer (IE): Press the <F5> key, then click Retry on the pop-up window. This should bring up Xtender again.

Where do I get help?
If you have an issue that is not covered in these instructions, please contact the Help Desk at your institution for assistance.
TTU Help Desk | 742-HELP | ITHelpDesk@ttu.edu
HSC Help Desk | 743-2875 | ITHelpDesk@ttuhsc.edu

Need additional Training?
If you feel that you need additional training over the navigation of Xtender, you can contact AFISM and a representative will contact you to schedule training.
AFISM | 742-KNOW | afism2know@ttu.edu

How to submit a BUG request?
A request to EAS must be submitted through the BUG system (Bugzilla) in order to gain access to an Xtender module. Follow these instructions on submitting the request.

- Go To: http://bugs.itis.ttu.edu/
- Click on File a Bug
- Click on Banner Enterprise Products (in red)
- Click on Enterprise Application Security (in red)
- On Component: Scroll down and Highlight Xtender
- On Summary field: Type in “Xtender Access”
- Description: Enter free-form text with the following information
  - Name of User
  - Oracle ID
  - eRaider
  - The Xtender Modules(s) the user is requesting (i.e. Student, Human Resource, Finance, Graduate Admissions, TSI, etc)
- Click Submit Bug
- EAS will then contact the appropriate owner of each module and will email you information that:
  1. Your request has been approved and access has been set up, or
  2. Additional information is needed prior to granting access

What it Means?

Folders or Applications:
- Documents are located in Folders which is also known as Applications. Depending on the users security determines which folders will be displayed on the Home Page of Xtender.

Document:
- Paper document(s) that have been scanned into Xtender

Query:
- To process a search

BUG:
- For Xtender, the BUG (Bugzilla) system is used to submit access requests into the Xtender system.

Modules:
- Modules are the different systems or folders within Xtender. For example, Student, Human Resource, Finance, as well as other miscellaneous modules. Numerous departments across campus are using Xtender for their departmental filing and storing systems.