

Xtender Help Guide

To aid users in troubleshooting the upgraded Xtender program, AFSIM has created the Xtender Help Guide. This page has information about solving common errors that occur in the system, as well as direct links to resources.

Some things you will find on the help page are...

- Directions if you are having problems accessing the Xtender site
- Guides to help navigate you within the updated system
- Step by step video tutorials
- Instructions for Emailing and Exporting Xtender Documents
- ePAF Attachment Instructions
- Information on scanning directly from your desktop scanner into Xtender
- IT Contacts
- Information on how to gain access to specific folders

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Xtender for ePAFs

After you have saved your ePAF, an active link to “**Upload Documents**” will appear near the top left of the page. Once you click “**Upload Documents**”, you will be automatically toggled over to the Xtender System.

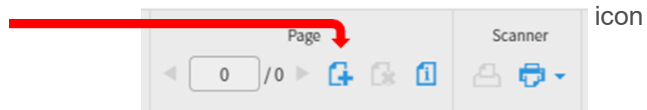
If you use the Xtender System to upload documents into your department’s applications/folders as well as uploading ePAF attachments, **Right Click** “**Upload Documents**”, then “[Open Link in Incognito Window](#)” or “[Private Tab](#)”. This should allow you to retain both sessions. If you are still having problems accessing the correct Xtender application/file, close the ePAF window and clear the cache or restart the browser.

How to Upload Documents in Xtender

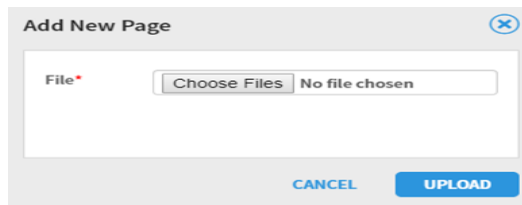
Option 1: Drag and drop files directly from your desktop into the Xtender System.

Option 2: After asking IT to download the Cloud Captiva Software to your computer, you can scan directly into the Xtender System using your desktop scanner.

Option 3: Select the “**Add Page**”



Then Select “**Choose Files**” to search for your documents. Once your files have been chosen, click “**UPLOAD**”.



Indexing your Document

The only indexing field you need to fill out it is the “**Document Type**”.

A screenshot of a form for indexing a document. The form has several fields: 'EPAF TRANSACTION ID' with value '1883800', 'ACTIVITY DATE' with value 'Timestamp', 'DOCUMENT TYPE' with a dropdown menu, 'TECH ID', 'FIRST NAME', 'LAST NAME', 'EFF DATE' with a calendar icon, and 'COPIED TO EMPL RECORD'. At the bottom are 'CANCEL' and 'SAVE' buttons. A red arrow points to the 'DOCUMENT TYPE' dropdown menu.

From the “**Document Type**” dropdown, either choose I-9 New Employee Packet or Other ePAF Attachments.

Then click “**Save**”

Afterwards, you should see a screen with your “indexed document”. You will know it is indexed because the indexing fields are no longer present. Once on this page, your document has been indexed and uploaded into the system. Therefore, you can close this tab and return to your ePAF.

Report of the Month

FI278 – Vendor Invoice Payee Research

Cognos report **FI278, Vendor Invoice Payee Research**, assists departments in verifying vendor payments. This report is very flexible and permits you to enter variable fields depending on what information is available. It is recommend that you only enter the purchase order number to simplify the search. The report includes information on all purchase orders entered in TechBuy. It is found in **Public Folders > TTU Finance > Procurement Reports**. This report is designed to review purchase orders only.

Select Chart of Accounts, Enter Purchase Order Number into box outlined in red. Select Finish.

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Texas Tech University
Vendor Invoice Payee Research

Select Chart of Accounts (optional):
Texas Tech University
Texas Tech University System
Texas Tech Univ Health Sciences Ctr
Texas Tech Univ Hlth Sci Ctr El Paso
[Select all](#) [Deselect all](#)

Select Fiscal Year(s) (optional):
2019
2018
2017
2016
2015
2014
[Select all](#) [Deselect all](#)

Banner Invoice Number (optional):
Choices:
[Insert](#) [Remove](#)
[Select all](#) [Deselect all](#)

Vendor Invoice Number (optional):
Choices:
[Insert](#) [Remove](#)
[Select all](#) [Deselect all](#)

Purchase Order Number (optional):
Choices:
P0xxxxxx [Insert](#) [Remove](#)
[Select all](#) [Deselect all](#)

Vendor ID (R-Number) (optional):
Choices:
[Insert](#) [Remove](#)
[Select all](#) [Deselect all](#)

Check Number (optional):
Choices:
[Insert](#) [Remove](#)

FI278 Vendor Invoice Payee Research, continued.

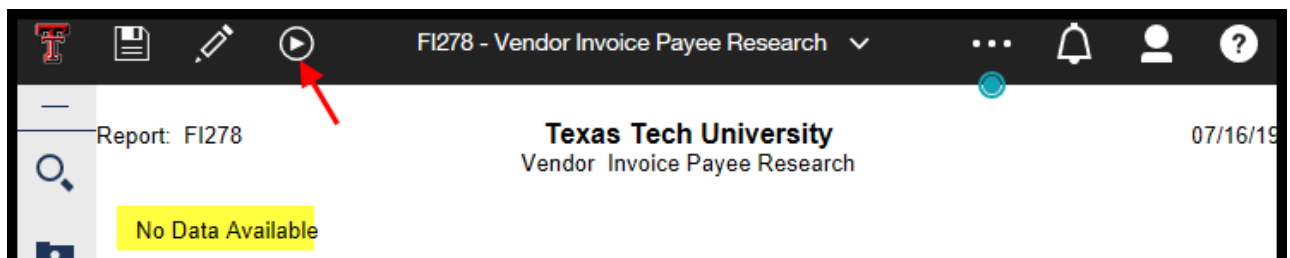
Payment has been made. The report output shown below shows the payment information for purchase order P0727486. The data provides the FOP that funded the payment, the Purchase Order Number, Vendor ID and Name, followed by the Vendor Invoice Number. The date of the invoice is shown followed by the Payment Due Date, the Transaction Date of the Payment and the check number and check amount.

Report: FI278		Texas Tech University Vendor Invoice Payee Research										07/15/19	
Banner Invoice Number	Chart	Fund	Organization	Program	Purchase Order Number	Vendor ID	Vendor Name	Vendor Invoice Number	Invoice Date	Payment Due Date	Transaction Date	Check Number	Check Amount
V9815870	T	16A050	C11000	600	P0727486	R10215994	Summus Staples	3416910238	06/15/19	06/30/19	06/15/19	11068363	182.97

Payment is scheduled. The report output below shows that the invoice has been received and payment is scheduled to be sent by the Payment Due Date. Check details are not included because the check has not been issued yet.

Report: FI278		Texas Tech University Vendor Invoice Payee Research										07/16/19	
Banner Invoice Number	Chart	Fund	Organization	Program	Purchase Order Number	Vendor ID	Vendor Name	Vendor Invoice Number	Invoice Date	Payment Due Date	Transaction Date	Check Number	Check Amount
V9823259	T	16A050	C11000	600	P0732003	R10215994	Summus Staples	3418888137	07/06/19	07/21/19	07/06/19		

No Data Available. Utilize “Return to Prompt” shown with arrow to verify parameter was entered correctly. Indicates that payment has not been made and is not scheduled. For further assistance, contact payment.services@ttu.edu.



Reports that can be used to find open purchases orders include the FI137—Open Encumbrance Report or the FI030—Encumbrance Ledger Transaction Report, selecting option for Open Encumbrances to display

AFISM August Class Schedule

Class Name	Date
Financial Reporting - Budget Reports	8/5 & 8/15
Financial Reporting - Transaction Reports	8/6 & 8/20
Cognos Grant Reporting	8/6 & 8/22
All about HR and ePAF	8/7 & 8/20
Account Code Training for Expenditures	8/7 & 8/23
Account Code Training for Expenditures	8/7 & 8/23
HR Reporting - Employee Appointment Reports	8/8 & 8/22
Xtender - Scanning and Indexing	8/9 & 8/19
Introduction to Cognos	8/9 & 8/19
EOPS - Employee One-time Payment System Overview	8/9 & 8/23
TechBuy Shopper Training	8/12 & 8/29
HR Reporting - Payroll Reports	8/12 & 8/26
Travel Training for Travel Preparer	8/13 & 8/27
Financial Management 101: Introduction to the FOAP Codes	8/14 & 8/28
Banner 9 - Finance Navigation	8/14 & 8/28
Budget Management and Revision	8/15 & 8/29

If you are interested in enrolling into one of the sessions above, please log in to Cornerstone. It can be accessed using this link: <https://apps.afism.ttu.edu/enterRegistrationSystem/>.

***Please note the class dates and times are subject to change.*



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AFISM is here and eager to support the growing data and technology needs of the University. Our services include training, report writing, data delivery, data presentation, web development, and much more. Should you have any questions of how AFISM might assist your department, please do not hesitate to reach out.



Contact Us

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