




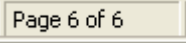








Scan and Index Pages


Use this job aid to scan and index documents that will be used during the EPAF approval process. This procedure is designed for scanning and indexing one or more documents intended to be grouped under one single document type.

Basic Steps	Detailed Steps
ACCESS WEBXTENDER	<p>1. Log on to Banner. The Banner <i>General Menu</i> displays. Note: The first time you access WebXtender, you must do so from Banner.</p> <p>2. In the Go To box, type the Banner form name, such as PEAEMPL or NBAJOBS, and press the Enter key. The Banner form displays. Note: If you are an approver with outstanding electronic approval transactions, you will receive a pop-up message asking if you would like to view these transactions. Click No to dismiss it, and continue the scanning process. Approvers will also receive a message asking if they wish to be notified of new transactions during the current session. Click No to dismiss this message, and continue scanning, and the Banner form will display.</p> <p>3. Click in the ID field and type the person's Banner ID. The name of the person associated with the Banner ID populates in the next field. If the name is not correct, re-type the correct Banner ID and press Enter.</p> <p>4. From the WebXtender toolbar, click the BXS - Add Document  toolbar button. The WebXtender application opens in a new window.</p>
CHOOSE A SCANNER (OPTIONAL)	<p>5. You should notice that the Scan  toolbar button is active. Note: If the Scan button is not active, you may need to select a scanner. To do this, click the Scanner Setup  toolbar button, then click Select Scanner. Select the scanner you wish to use, and click the OK button. The Scan toolbar button should now be active. Note: Select the scanner with the letters TWAIN preceding it, if given a choice.</p>
	
PREPARE FOR SCANNING	<p>Before beginning the scanning procedure, it is important to make sure your documents and scanner are ready to scan. Here are some general guidelines:</p> <ul style="list-style-type: none"> • Make sure all staples and paper clips are removed from the documents. • Depending on your scanner, documents with color or watermarks may need to be photocopied first so that a black and white copy may be scanned. • <u>If</u> the order of the documents is important, make sure to put them in the correct order before scanning them. Ordering can be corrected, but with several added steps. • Make sure you have tested your scanner, and have it set to the recommended WSU quality and file type standards. <p>Once your scanner and documents are ready, continue to the next step.</p>

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SCAN PAGES	<p>6. Feed the documents into the scanner according to the document orientation guidelines for your scanner, i.e., print face-up or face-down, load from the top of the page or bottom of the page first.</p> <p>7. Click the Scan  toolbar button. Your scanner will launch its scanning software and you must take the steps required to complete the scanning process.</p> <p>Once this is done, you will be returned to the WebXtender screen, and you will see the imported document, or first page of a group of documents, display in the application window. At this point, continue to the next step.</p>
INDEX THE PAGE	<p>8. If you'd like to start from the first page of your scan, you can determine if you are at page one by looking at the page counter near the bottom left-hand portion of the screen. </p> <p>If you want to navigate to page one, or another page, you can use the navigation buttons   to move between pages.</p> <p>9. Click the New  icon. The Indexing panel appears with the Banner ID and related information displayed, as well as a time and date stamp in the Activity Date field.</p> <p>10. Click the drop-down arrow  of the Document Type field. You will see a list of choices for indexing.</p> <p>11. Select the appropriate document type for the page currently displayed. Your document will be indexed according to your selection.</p> <p>12. Click in the Comments field and type comments relevant to the document(s) being indexed, i.e., information that may make it clearer to the approver who will be viewing the documents. There is a 30-character limit. <u>This is optional</u>, and is determined by the needs of each individual business unit.</p> <p>13. Click the Save  button. This will index the page that was displayed when you clicked the Save button. If there were multiple pages in the scan, you will notice that the page count is reduced by one. Ex. Page 1 of 5 would now read Page 1 of 4.</p>
ATTACH REMAINING PAGE(S)	<p>14. At this point you have indexed one page. If you have additional pages (one or more):</p> <p>Click the Attach All Pages  icon. This will index each remaining page under the index selection you just made.</p>

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LOGOUT	15.	<p>Once you have attached the page(s), the following window will appear.</p> <div data-bbox="651 241 1292 682" data-label="Image"></div> <p>Select Logout of App Xtender Web Access .NET. This will close the application.</p>
	16.	<p>Click the Close  button to close the browser window.</p>