Banner Document Management Suite
Indexing Batches in Web Access

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Release 2.0
Logging into Web Access

Open Internet explorer.

Enter URL on address line.

**URL**
http://______________ /Appxtender/login.aspx

Server name or IP

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Enter Banner user name and password.
Select “View” or the folder icon then select “Batch List”
Select the application from the Current Application drop down list.

Left mouse click on the yellow folder next to the batch that you want to index.
The first document in the batch will be displayed and is ready to be indexed.
Enter the Banner ID # in the first field Then Select the TAB key.

The following fields will populate with data from Banner:
- PIDM
- Last Name
- First Name
- SSN
- Birth Date.

Select the Appropriate document type for the document being displayed

Then click on Save.
Important Indexing Rules

The next documents displays.

* THREE IMPORTANT RULES *

1. If the document is the second page of the previous document, click on the single page green plus.

2. If the document belongs to the same Banner ID # as the previous document, but the Document Type is different then click on the “New Document” icon

Then:

   A) Click on the “Last Modified Index” icon
      The fields will auto populate with the Previous index values.

   B) Select the new document type
      From the drop down list and click on save

3. If the document belongs to a different Banner ID # click on the “New Document” icon and enter in the new ID and Document Type and then click save.
Unique Key Violation

If the following message appears after indexing a document this means that a document with the exact indexing data already exist in the system and this document will need to be appended to the existing document.

Click on the “Select Indexes” icon

The system will search for existing documents with the same index values

When the index value is displayed
Select the green plus on the page and the present document will append to all previous documents with the same index values.
If Banner ID # is not known, you can index by Last Name, First Name, or SSN#.

Enter information into the field and click on the "Key References and Index" icon.

The system will search for the information based on the SSN# that was entered.

Click on the page icon and the field will auto populate with the data.
Select the document type from the drop down list.

Then click on SAVE
Modify an Index

To modify the index data click on the “modify” button

* IMPORTANT *

Do not click on Modify to index a “new document”
The "ID" and "Document Type" fields are the only index fields that can be modified

Term Code, Application Number, Admissions Requirement, Institutional Number are defaulted to read only after indexing
(The read only setting can be turned off these fields)
Icon Descriptions

LOGOUT
ATTACH CURRENT PAGE

VIEW/MODIFY YOUR USER SETTINGS
ATTACH ALL PAGES

BATCH LIST
MODIFY

BATCH IMPORT
RETURN TO BATCH SCANNING

APPLICATION LIST
LAST MODIFIED INDEX

DELETE BATCH
CLEAR INDEX

CHANGE BATCH STATUS

REFRESH BATCH LIST

SELECT INDEXES

KEY REFERENCE & INDEXES

AUTO INDEX

NEW DOCUMENT

VIEW LAST INDEX DOCUMENT