

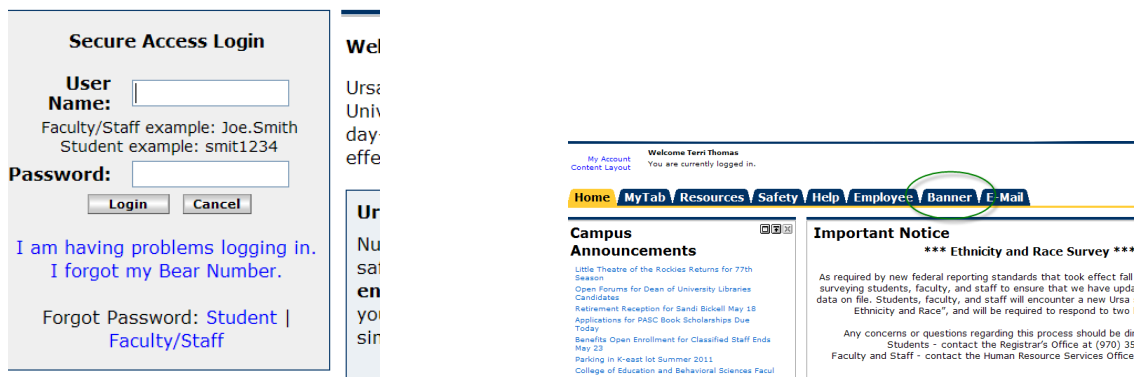
Xtender FAQ's

What happens if I can't log into Xtender?

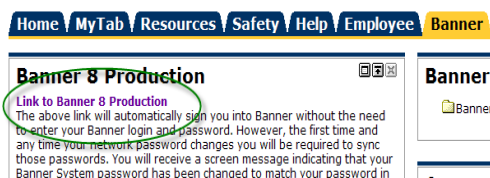
- You will need to check with IM&T to see if your security has been set up.

I have security but when I try to log in I get the error message "invalid user or incorrect password".

- Xtender passwords do not automatically sync to your URSA passwords. Since this is the first time you are logging into Xtender, you will need to sync your Xtender and Banner passwords.

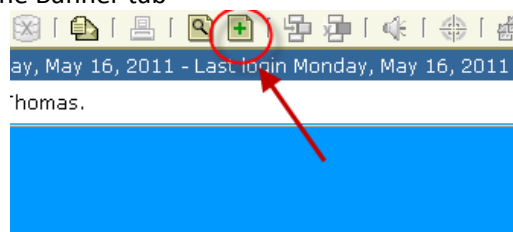


- Log into Banner



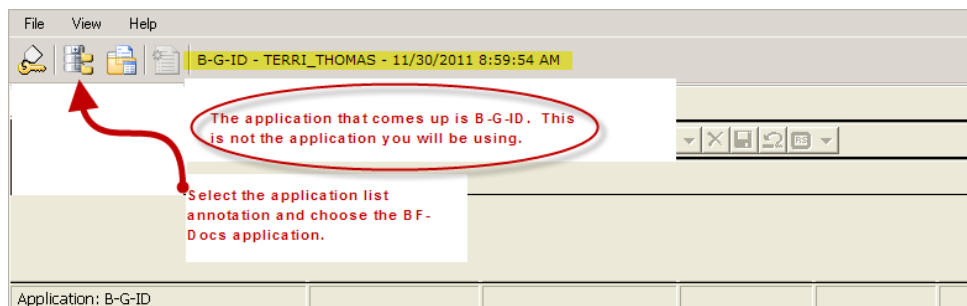
- Select Link to Banner 8 Production

Select the Banner tab



This will sync your password to Xtender
This is also a shortcut to get to Xtender.

Once your passwords are in sync, the following screen will appear. Follow the process described in the diagram below.



I am logged in but I am getting errors. What do I do now?

- One you have logged in and this is your first time, you will need to make sure your components have been installed. Follow the instructions on the link below to learn how to install components:

<https://webxtender.unco.edu/AppXtender/Login.aspx>

- You will need to follow this process again if you have updated your computer.

It has been awhile since I have been in Xtender. Now, when I go in I am being told my password is incorrect.

- Follow the same instructions as described above in the new user question. You will need to sync your passwords.

Do I need to complete a TA if the traveler is not being funded?

- No, but you do need to have an approval of some sort in your department.

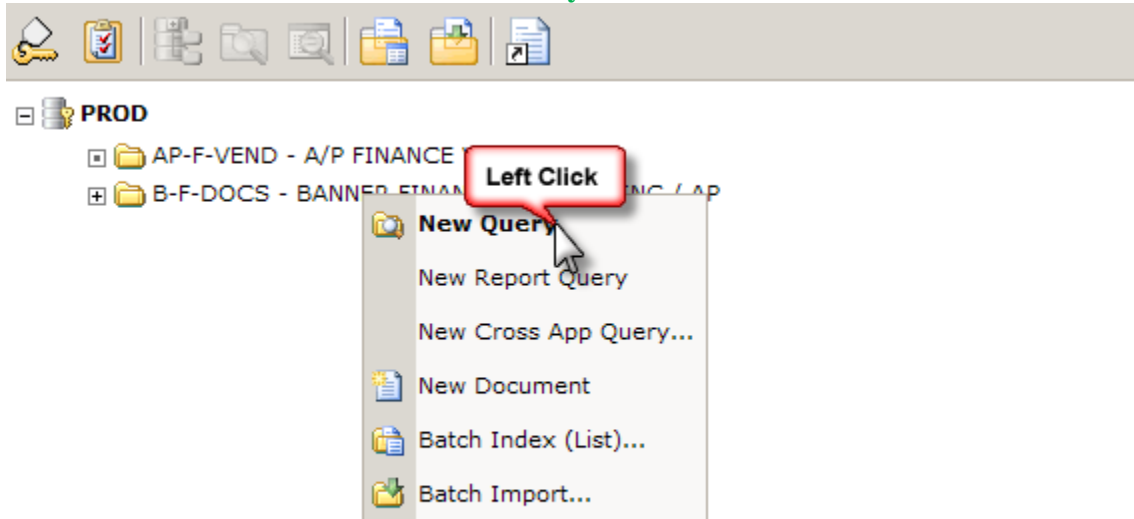
If a traveler has an “open or standing” UNC card and does not require the card to be loaded, does the TA still need to be routed to PCard?

- Yes. The PCard administration will ensure there are enough funds approved on the TA for the trip. It will then be routed to Accounts Payable for them to deposit the funds in the traveler’s personal bank account 1 week prior to travel.

How can I ensure the TA has been loaded?

- An email will be sent to both the traveler and the preparer of the TA once the TA has been loaded or viewed by the PCard administrator.

How can I retrieve a copy of the TA once all of the signatures have been obtained once it has been routed to PCard or Accounts Payable?



- Log into Xtender
- Right click on BF Docs

- Left click on New Query

Query Criteria for Application 'B-F-DOCS' Current Query:

Show	Index Name	Search Value
<input checked="" type="checkbox"/>	DOCUMENT ID	<input type="text"/> <small>Do not search by Document ID as this changes</small>
<input checked="" type="checkbox"/>	BANNER DOC TYPE	<input type="text" value="*"/>
<input checked="" type="checkbox"/>	DOCUMENT TYPE	<input type="text" value="*"/>
<input checked="" type="checkbox"/>	TRANSACTION DATE	<input type="text"/>
<input checked="" type="checkbox"/>	VENDOR ID	<input type="text"/>
<input checked="" type="checkbox"/>	VENDOR NAME	<input type="text" value="WELSH"/>
<input checked="" type="checkbox"/>	FIRST NAME	<input type="text" value="MICHAEL"/>
<input checked="" type="checkbox"/>	PIDM	<input type="text"/>
<input checked="" type="checkbox"/>	ROUTING STATUS	<input type="text" value="*"/>
<input checked="" type="checkbox"/>	ACTIVITY DATE	<input type="text"/>

→

- Enter vendor ID and/or vendor last name and first name
- Select Submit
 - **HINT: Do not search on Document ID because this changes.**

Document 1 - 13 of 13

<input type="checkbox"/>	DOCUMENT ID	BANNER DOC TYPE	DOCUMENT TYPE	TRANSACTION DATE	VENDOR ID	VENDOR NAME	FIRST NAME	PIDM	ROUTING S
<input type="checkbox"/>	I0222064	INVOICE		t-2011	800254398	WELSH	MICHAEL	15863	
<input type="checkbox"/>	I0222065	INVOICE		t-2011	800254398	WELSH	MICHAEL	15863	
<input type="checkbox"/>	MW100311		TRAVEL AUTHORIZATION	03-Oct-2011	800254398	WELSH	MICHAEL		AP - TERRI
<input checked="" type="checkbox"/>	MW91911				800254398	WELSH	MICHAEL		AP - TERRI
<input type="checkbox"/>	I0219251	INVOICE	TRAVEL AUTHORIZATION	20-Sep-2011	800254398	WELSH	MICHAEL	15863	AP - TERRI
<input type="checkbox"/>	I0219096	INVOICE	TRAVEL AUTHORIZATION	06-Sep-2011	800254398	WELSH	MICHAEL	15863	
<input type="checkbox"/>	I0218264	INVOICE	TRAVEL	22-Aug-2011	800254398	WELSH	MICHAEL	15863	
<input type="checkbox"/>	I0218262	INVOICE	TRAVEL AUTHORIZATION	22-Aug-2011	800254398	WELSH	MICHAEL	15863	
<input type="checkbox"/>	I0217061	INVOICE	TRAVEL AUTHORIZATION	01-Aug-2011	800254398	WELSH	MICHAEL	15863	
<input type="checkbox"/>	I0215699	INVOICE	TRAVEL	06-Jul-2011	800254398	WELSH	MICHAEL	15863	
<input type="checkbox"/>	I0211465	INVOICE	TRAVEL AUTHORIZATION	13-May-2011	800254398	WELSH	MICHAEL	15863	
<input type="checkbox"/>	I0161574	INVOICE	TRAVEL	18-Dec-2009	800254398	WELSH	MICHAEL	15863	
<input type="checkbox"/>	I0158504	INVOICE	TRAVEL	19-Nov-2009	800254398	WELSH	MICHAEL	15863	

If the documents were entered in Xtender the documents will appear.

If the document ID has a I0, it will not be able to be viewed unless you have FUND/ORG security for that fund/org. You may contact Accounts Payable for assistance.

If the Document ID has something other than the I0, you can view the document by checking the check box, or double clicking on the page icon.

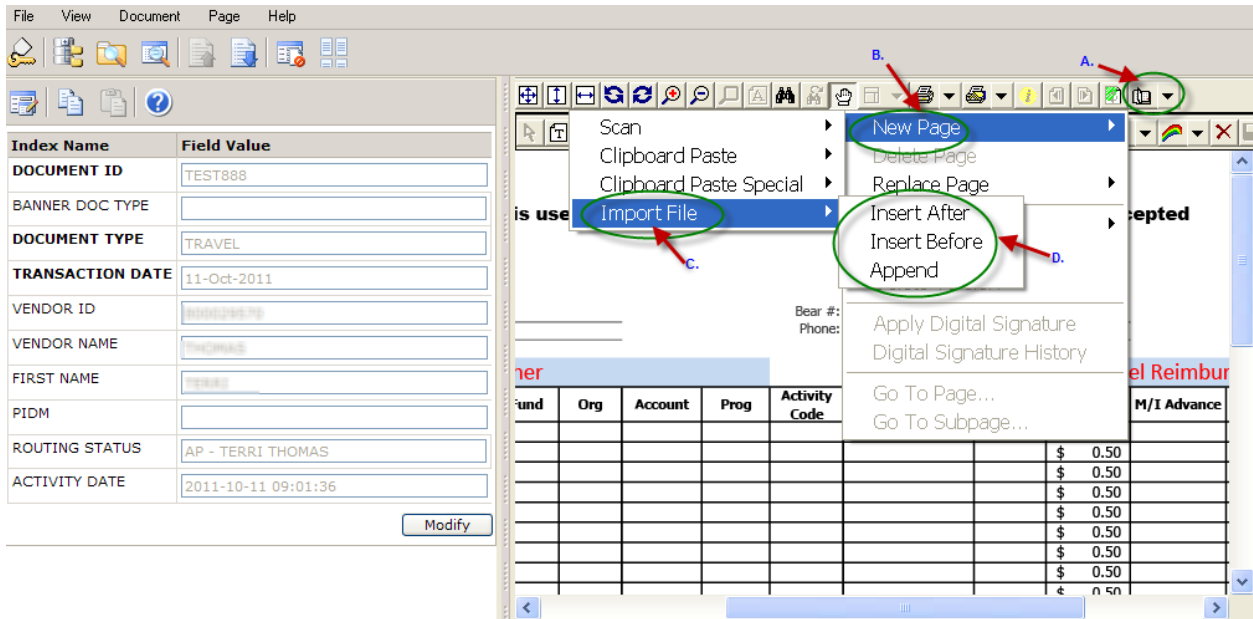
I am using a “Mac”, can I still access Xtender?

- Yes, you will need to install the virtual PC. Contact Bear Logic for more information.

Do I need to attach the TA that was submitted previously for a trip to the expense sheet?

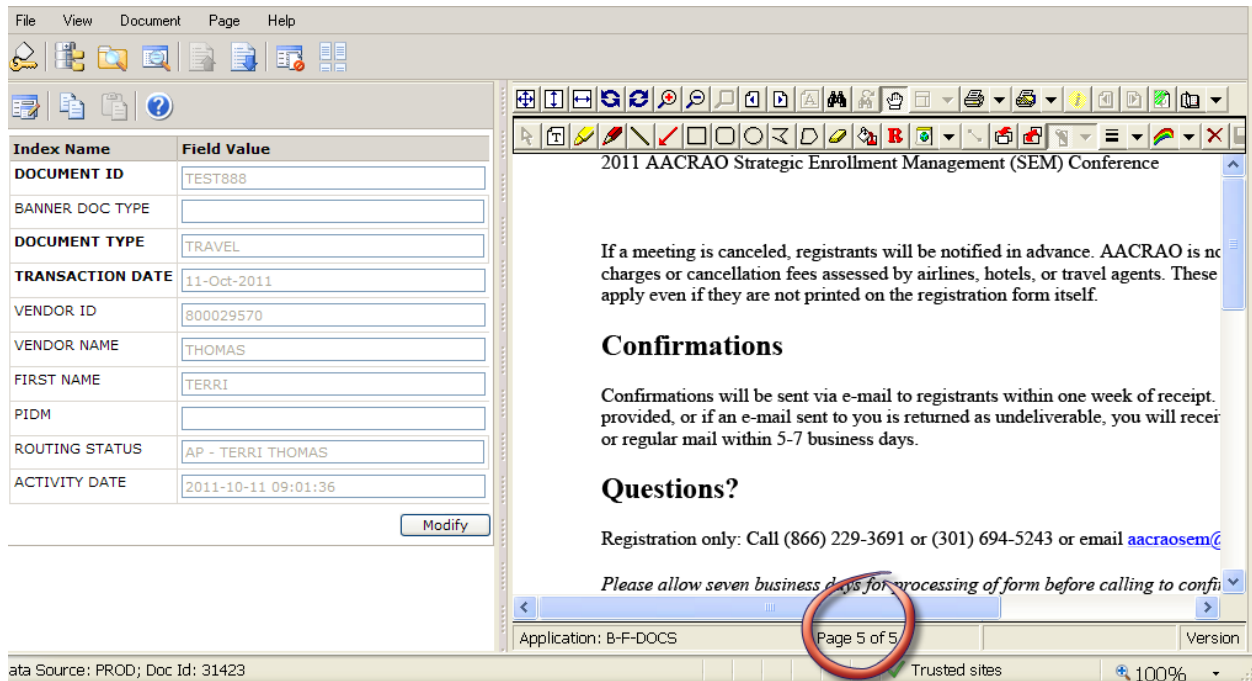
- Yes. Once an email is received to notify you the traveler’s card has been updated or reviewed follow the following process:
 - **HINT: This is why it is important the preparer of the TA is the Administrative Assistant.**

Once the document has been located, follow the following process:



- Select Page menu annotation
- Select New Page
- Select Import File (this is a file/s you have saved as a PDF somewhere on your computer)
 - You may choose one PDF file or multiple.
- Choose in what order you want your document placed, or just select Append

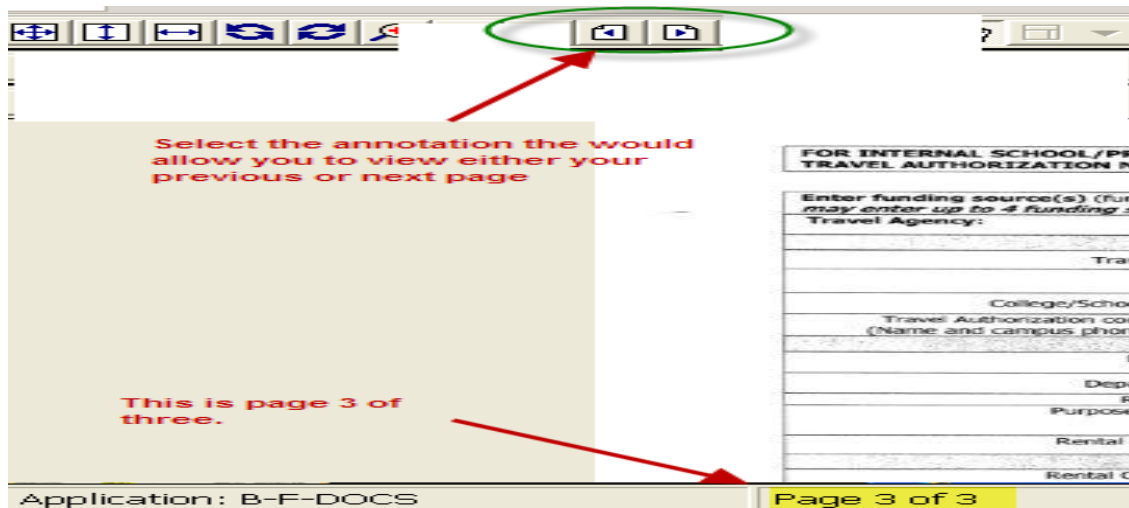
To select multiple documents, you will hold down your control key on your keyboard and select the document/s you wish to attach. You will know that all pages have been attached by looking at the bottom of the xtender screen which will indicate how many pages are attached.



The number of pages of the document will appear at the bottom of your page.

- **HINT:** There is no need to modify your document as it should already be in the correct routing status you selected. If it is not, you may select modify; select the routing status you want your document to go to; select SAVE.

When returning to the first page or viewing pages of your document, you will use your toggle annotations.



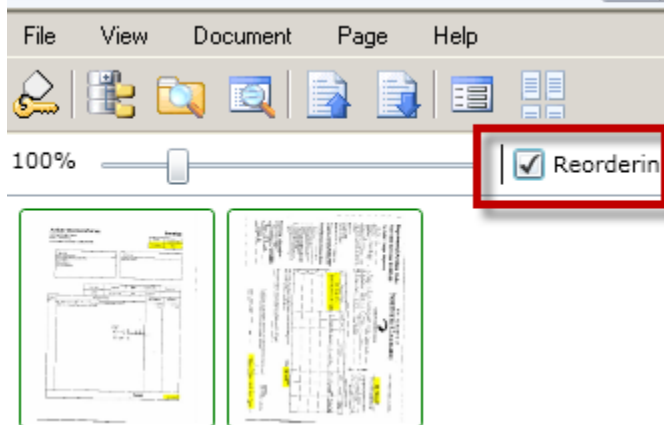
- Make sure the payment document is the first page.

How can I reorder pages I scan/import into Xtender?

- If you forget to scan in the pay document first, the documents may be re ordered by clicking on the icon (toggle document thumbnail view) inside the red box.



- a. Click on the reordering box inside the red box.



- b. You can then just drag the documents into the order preferred and click back on the document index icon.

How do I rotate the pages and save the image?

- Rotate documents before highlighting.
 - Use the rotate icons in the red box until the view is correct and then click on the drop down arrow on the page menu icon in the second red box.



- Click on new version and then click on current view. (I cannot seem to snag a view of the drop down menu but it is very simple.) If the form is highlighted before the page is rotated then it just grays out the text and becomes very difficult to see.