

## Xtender Instructions

Log into AUAccess

Select "Finance" tab and select Xtender under "SSB Finance Shortcuts"

<https://xtender.auburn.edu/AppXtender/?sso=true> (Must be logged into AU Access)

The screenshot shows the ApplicationXtender Web Access interface. At the top, there is a blue header bar with the text "opentext | ApplicationXtender - BANPROD" on the left and a user profile icon labeled "WASHIM" on the right. Below the header, on the left side, there is a sidebar menu titled "Applications" with a list of items: "B-F-DOCS", "B-G-ID", "BO\_INTERNAL\_TRANSACTIONS", "PPS\_INVOICES", and "PPS\_FO". The main content area on the right has a light blue background and contains the following text: "Welcome to ApplicationXtender Web Access", "ApplicationXtender Web Access allows you to manage all types of ApplicationXtender documents.", and "By using ApplicationXtender Web Access and a standard Web browser, you can create, index, retrieve, access, view, and manage ApplicationXtender documents through the Internet."

## For Journal Documents

Under Applications menu select "B-F-DOCS"

Click "New Query"

The screenshot shows the opentext ApplicationXtender - BANPROD interface. On the left, the 'Applications' menu is expanded, showing options: B-F-DOCS, B-G-ID, BO\_INTERNAL\_TRANSACTIONS, PPS\_INVOICES, and PPS\_PO. The 'B-F-DOCS' option is selected. The main area displays 'B-F-DOCS - BANNER FINANCE PURCHASING / AP'. A 'NEW QUERY' button is visible in the center. The top bar includes the opentext logo, user name 'WASHBOM', and a search icon.

Enter your "Document ID" and click "Run"

The screenshot shows the 'New Search - B-F-DOCS' form in the opentext ApplicationXtender - BANPROD interface. The left sidebar shows the 'Applications' menu with 'B-F-DOCS' selected. The main area contains a 'Search Criteria' section with the instruction 'Enter a search term in the index fields to filter your results.' Below this, there are 16 input fields for search criteria: DOCUMENT ID (containing '0100022'), BANNER DOC TYPE, DOCUMENT TYPE, TRANSACTION DATE, VENDOR ID, VENDOR NAME, FIRST NAME, PIDM, ROUTING STATUS, ACTIVITY DATE, FOAP, STIMULUS?, BID NUMBER, VPD1\_CODE, DISPOSITION DATE, DOCUMENT NAME, and CREATE NAME. Each field has a dropdown icon to its right. At the bottom, there are three buttons: 'RUN', 'SAVE', and 'CANCEL'.

\*Only key in search info you know\*

## For Voucher Documents

Under Applications menu select “PPS\_VOUCHERS”

Click “New Query”

The screenshot shows the opentext ApplicationXtender - BANPROD interface. On the left, the Applications menu is expanded, showing options like B-F-DOCS, B-G-ID, BO\_INTERNAL\_TRANSACTIONS, PPS\_INVOICES (selected), and PPS\_PO. The main area displays 'PPS\_INVOICES - PAID INVOICES' with a 'NEW QUERY' button. Below this is a 'Saved Queries' section with columns for Name and Created By.

Enter your “Check Number” in the CHECK NUMBERS box with an asterisk before and after the check number and click “Run”

The screenshot shows the opentext ApplicationXtender - BANPROD interface with the 'New Search - PPS-VOUCHERS' form. The left sidebar shows the Applications menu with 'PPS-VOUCHERS' selected. The main area contains search criteria fields: VOUCHER ID, DOCUMENT TYPE, VENDOR ID, PO NUMBER, INVOICE NUMBER, CHECK NUMBERS (containing '\*11257349\*'), PSC NUMBER, STIMULUS?, CHART, and ACTIVITY DATE. Below the fields is a checkbox for 'Include previous document revisions' and buttons for 'RUN', 'SAVE', and 'CANCEL'.

## What is Xtender?

Application Xtender (Xtender) is a document repository and imaging product that provides the ability to capture, organize, store and retrieve documents.

Xtender stores the documents by an index value unique to each document. This gives the users the ability to retrieve information through a variety of search methods ranging from broad and very general queries to specific queries rendering only the most relevant documents.

## Before you begin...

- Xtender can be used in any browser: IE, EDGE, CHROME, FIREFOX, MOZILLA (no longer need Active X controls loaded)
- You will need security to the Xtender system – this can be requested through [Xtender@auburn.edu](mailto:Xtender@auburn.edu). Make sure you specify the security needed OR a person to model you after.
- Use the link <https://xtender.auburn.edu/>. If you do not see Aubie (AU mascot) you are not using the correct link. This will take you through the CAS authentication. You will have to DUO into the system as well – so make sure you have that set up.
- If you have issues or questions you can contact Xtender support at [xtender@auburn.edu](mailto:xtender@auburn.edu)

## So...where's my stuff?

The Finance Profile in Xtender will get you access to these cabinets:

**B-F-DOCS - BANNER FINANCE PURCHASING / AP**

**PPS-PO - PURCHASE ORDER (older documents)**

Manually keyed Vouchers (not E-VV) and Purchase Orders

**BO\_INTERNAL\_TRANSACTIONS - ACCT ENTRIES**

Journal Vouchers

**PPS-VOUCHERS - VENDOR**

E-Vendor Vouchers

(Processed through E-VV system - SSB)

**CG\_PAR - PERSONNEL ACTIVITY REPORTS**

**CG\_SAL\_WG\_TRF - SALARY WAGE TRANSFERS**

Contracts & Grants documents



Only key into the Search Criteria the information you absolutely know.

Check numbers beginning with "05" are physical paper checks;  
Check numbers beginning with "!" are Electronic payment.

PPS\_VOUCHER: When searching by check or Invoice, make sure you include a wildcard before and after the number:  
\*!123456\*. These are stored as one long string of characters.

As with all of the cabinets you generally only want to use one search term. The \* is a wildcard. You may come across a file with multiple check numbers/Invoices and the \* allows you to look within the whole string of data.

## **Some Banner Forms that link to Finance Documents in Xtender:**

- **FPIPURR** – PO QUERY – Purchase Orders
- **FGIJVCD** – FINANCE QUERY – Journal Documents
- **FGITRND**– FINANCE QUERY – Journal Documents
- **FGIDOCR** – FINANCE QUERY – Journal Documents



# I Can't Get Logged In!

If you have an incident where you don't log out or your browser closes unexpectedly, your login can get hung up in the system.

To clear your login:

AUAccess

Self-Service

Employee Tab

Clear Xtender Login – follow-instructions

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844-8075

<https://xtender.auburn.edu/AppXtender/?sso=true>