

Imagination
to
Realization



A Practical Guide for FA Imaging

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Evaluation Code 541

Session Rules of Etiquette

- Please turn off your cell phone/pager
- If you must leave the session early, please do so as discreetly as possible
- Please avoid side conversation during the session

Thank you for your cooperation!

Introduction

- This presentation will describe how functional users in the Financial Aid Office at Clayton State University use Banner Xtender Solutions on a daily basis to simplify and streamline routine processing of aid.
- This presentation will include step-by-step instructions used to perform queries, e-mail imaged documents, do paperless verification, perform automatic indexing of merged documents, and more.

Topics of Discussion

- A New User's Perspective
- Basic Workflow
- Simple and Complex Queries
- Paperless Verification
- E-Mailing Documents
- Importing a Single Document
- Automatic Indexing of Merged Documents

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Topic One

A New User's Perspective....

A New User's Perspective:

- I love it!!



- You're able to keep track of documents that the students have submitted, and when they submitted them, immediately.
- No problem with documents being filed out of alphabetical order and being "lost".

You have a lower percentage of documents getting “lost” in the shuffle between mail, noting in RRAAREQ, and the counselor’s desk/box. Not having to say “They’ve been misplaced. Please submit them again.” or “Where did I put that worksheet?”



- If another counselor is working on a student's documents, you don't have to go to that counselor for the documents, they're accessible to you immediately.
- You don't have stacks of paperwork you have to file and/or alphabetize each year.
- Prior year documents are easily accessed (no file cabinets).

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Topic Two

Basic Workflow....

Basic Workflow

- Log all documents into Banner
- Separate individual student's information with colored divider
- Place in bin for imaging
- Scan documents in batch using **ScanXtender**
- Index documents using **ApplicationXtender**
- File imaged documents for limited time in alpha order by scan date

- View documents through **WebXtender**
- No software installation required on individual machines for WebExtender
- Simple and user friendly
- The persons scanning and indexing are critical people – everything depends on them!

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Topic Three

Simple and Complex Queries....



Query from Banner

- Depending on the setup, information can be queried directly from a Banner form
- Open the form and page down
- Click XS icon in toolbar
- WebXtender opens and query results appear
- Double click document to open



Basic Query in WebXtender

- Select  or right click application and select **New Query**
- Verify correct application is selected
- Enter query information such as ID, Last Name, Aid Year, etc
- Submit
- Double click document to open
- Click  to close document and return to results



More Complex Queries

- Search using an asterisk as a wildcard
- Search using a list of values 
- Search using a range 
- Save queries for access on a regular basis
- Control access to saved queries – creator only or all users

Query by List of Values

- Click New Query icon 
- Click  icon to search by list
- Enter list of values and click OK
- Enter any additional search criteria for other fields
- Submit

Query by Expression

- Click New Query icon 
- Click  to search by range
- Select type of comparison to be used
- Enter value(s) and click OK
- Enter any additional search criteria for other fields
- Submit

- Expression syntax visible in search value text box
- Range options limited to [], >, >=, <, <=, and <>
- Date values entered as yyyy-mm-dd hh:mm:ss
Example: 2005-01-25 00:00:00

Query Across Applications

- Right click on application – B-R-TREQ
- Select New Cross App Query
- Move applications to right
- Double click each field that should be seen in the results so that a ✓ is visible
- Identical fields in different applications are automatically checked

- Double click each field to be used in the search so that a ? is visible
- Ensure each application shares at least one searchable field with one other application
- Check/uncheck to make available for all users
- Click Apply, enter name for query and save
- Make changes if necessary, apply, and close

Run Cross App Query

- Expand any application included in the cross app query
- If data selection is pre-set, double click the query OR right click and select Run
- To add search criteria, right click the query and select Edit and enter criteria
- Edit query or properties with right click

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Topic Four

Paperless Verification....

Paperless Verification

- Dual monitors are a **necessity!**
- RNANAxX is brought up on one screen and the imaged document is brought up on the other screen for easy comparison.
- Messages or comments can be added in Banner while still viewing the document.
- Documents can be marked or highlighted as necessary and text can be added for explanation.

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Topic Five

E-Mailing Documents....

E-Mailing Documents

- Imaged documents can be e-mailed as an attachment.
- You will need to register your e-mail address the first time.
- A page or an entire document can be e-mailed as an attachment or a hyperlink.

- Search for document
- Check document on list to be sent or open document
- Click E-Mail icon  An icon of an open envelope with a green checkmark inside a small square box.
- Enter information for To, Subject, Message, etc.
- Do NOT send as hyperlink unless other party has same access. It is better to send as an attachment.
- E-mail status box will indicate email was sent successfully
- Close box

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Topic Six

Importing a Single Document....

Importing a Single Document

- Click BXS-Add Document icon in toolbar of Banner
- Browse and select file to be imported
- Check box to “Index Document After Upload”
- Click Upload
- Index screen appears
- Complete index information and Save



- You know you need a life when you get excited about imaging, but.....

This is my **VERY**
favorite part!

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Topic Seven

Automatic Indexing of Merged Documents....

Automatic Indexing of Merged Documents

- Letters are generated in Banner and merged in Microsoft Word.
- The data file used for the merge is also used for automatic indexing.
- A Visual Basic macro is used to split the file into separate word documents so the Automated Indexing functionality can be used.
- The same macro is used for all letters with minor changes to specific lines of information.

The Macro

```
Attribute VB_Name = "NewMacros"
Sub merge()
'
' Merge program for document imaging solution
' Program created 1/20/2004 by James Flowers
'
Dim liCount As Integer
Dim lsFilename As String
Dim lsPrimaryDocument As String
Dim lsPath As String
Dim liFR As Integer
Dim liLR As Integer
'Change path for each letter type
lsPath = "J:\imaging letters\no award\"
liCount = 1
lsPrimaryDocument = ActiveDocument.Name
ActiveDocument.MailMerge.DataSource.ActiveRecord = wdLastRecord
liLR = ActiveDocument.MailMerge.DataSource.ActiveRecord
ActiveDocument.MailMerge.DataSource.ActiveRecord = wdFirstRecord

Open lsPath & "Index.txt" For Output As #1
For liCount = 1 To liLR - 1
    With ActiveDocument.MailMerge
        .DataSource.FirstRecord = liCount
        .DataSource.LastRecord = liCount
        .Destination = wdSendToNewDocument
        .Execute
        .DataSource.ActiveRecord = liCount
        'customize here for each field to go into index'
        Print #1, .DataSource.DataFields(6) & "," &
        .DataSource.DataFields(4) & ",General Letters,,0304,@" & lsPath &
        "merge_" & liCount & ".doc"
    End With
    ActiveDocument.SaveAs lsPath & "merge_" & liCount & ".doc"
    ActiveDocument.Close
    Documents(lsPrimaryDocument).Activate
Next
Close 1

'Call the imaging uploader
Dim lsUserName As String
Dim lsPassword As String
lsUserName = InputBox("Imaging user name", "User name")
lsPassword = InputBox("Imaging password", "Password")
'Change file spec - after /S
Shell "C:\program files\Legato Systems\content
management\IndexImageImport.exe /U " & lsUserName & " /W " & lsPassword
& " /A B-R-TREQ /S FINAID /C /F "" & lsPath & "index.txt" /C"

End Sub
```

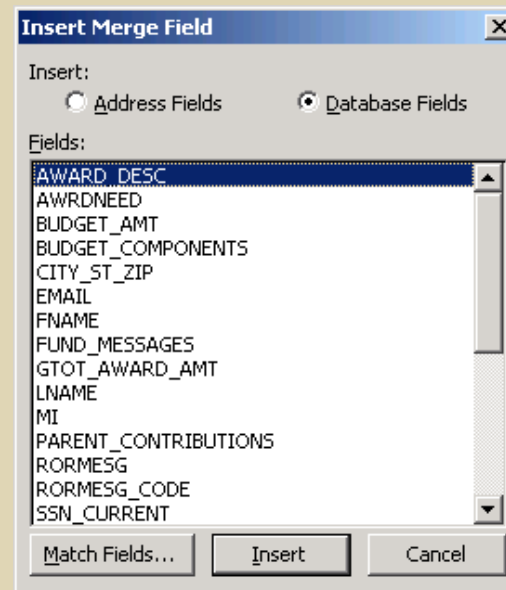
Setup for Automatic Indexing

- Must have Application Xtender installed on the machine running this process
- Create a specific folder for each type of letter
- Create a specification list under Index Image File Setup
- Customize path for each letter type

IsPath =

```
"\\ccsunet.clayton.edu\dfs\groupshares\finaid\imaging  
letters\award\"
```

- Customize field indexing information based on Index Image File Setup in Application Generator and document template



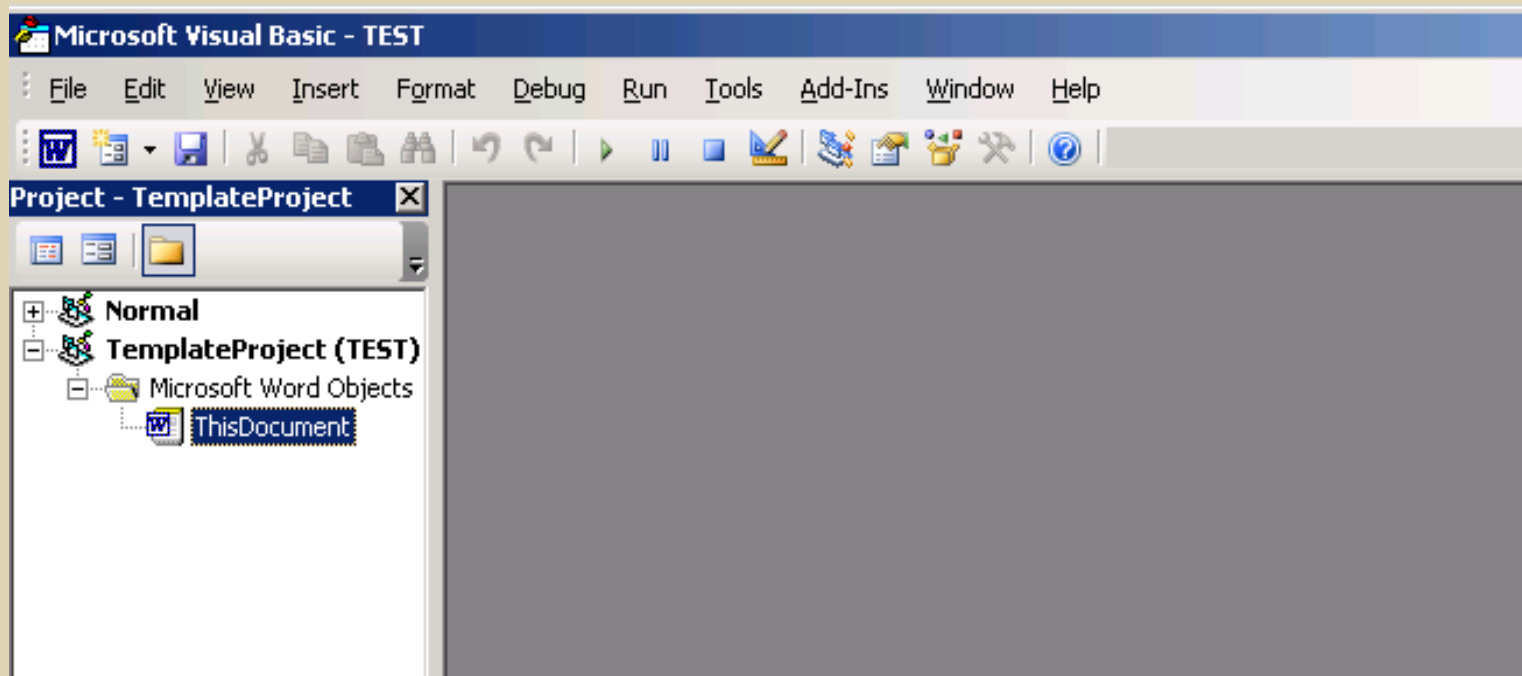
Print #1, .DataSource.DataFields(15) & "," &
.DataSource.DataFields(10) & ",Award
Letter,,0506,@" & IsPath & "merge_" & liCount &
".doc"

- Customize file spec to point to the correct directory for software application.

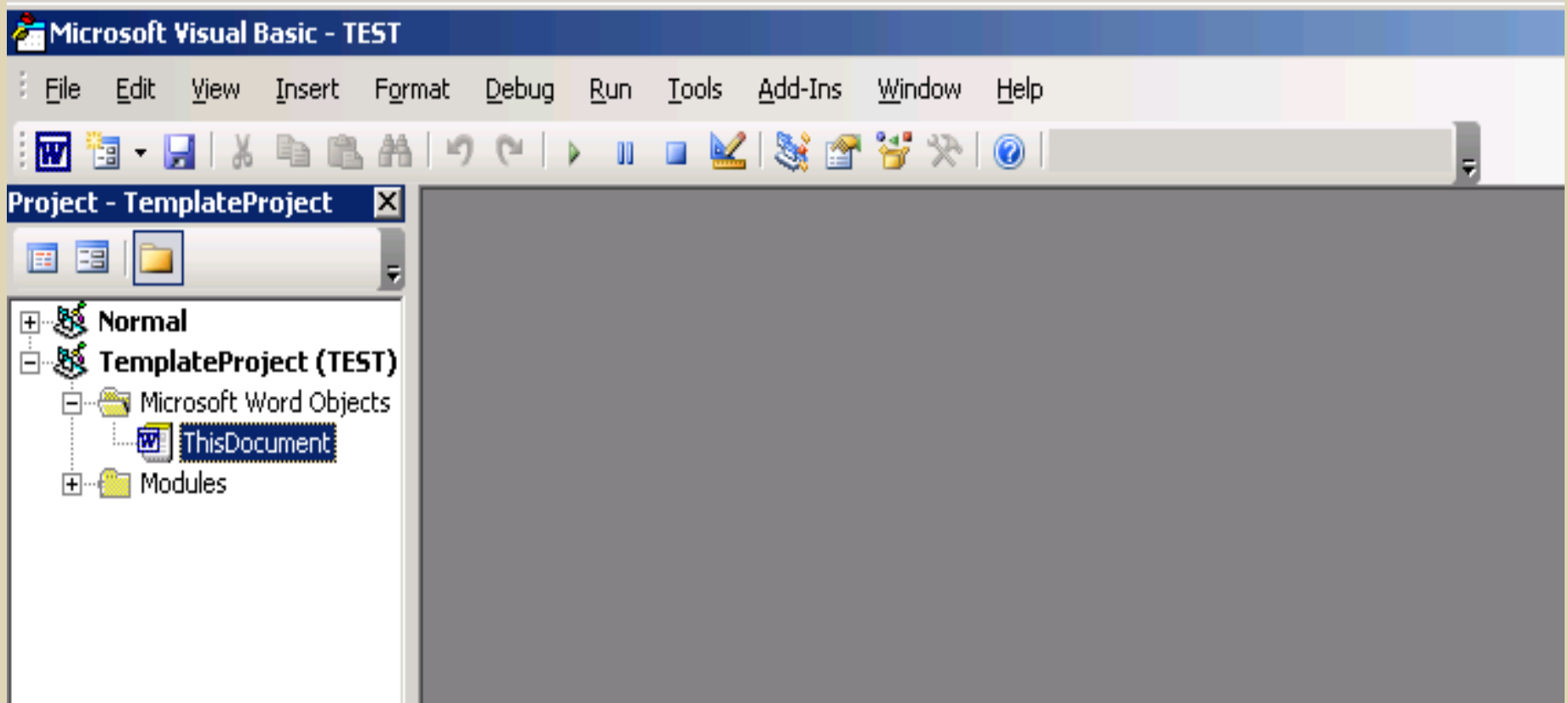
```
Shell "C:\program files\Legato Systems\content  
management\IndexImageImport.exe /U " &  
IsUserName & " /W " & IsPassword & " /A B-R-  
TREQ /S FINAID /C /F "" & IsPath & "index.txt"" /C"
```

Adding the Macro

- Open the document template in Word.
- From toolbar, Click Tools/Macro/Visual Basic Editor.



- Right click ThisDocument and select Import File.
- Import Macro and the Modules folder is added.



- Expand Modules.
- Double click NewMacros and macro is added.
- Edit as needed.
- Save
- That's it!

Running the Macro

- Open document template in Word
- From toolbar, select Tools, Macro, and Macros
- Select merge and run
- Each letter will “flash” on the screen as it is separated. (This may take some time.)
- After separation is complete, a prompt will appear for Banner User ID and Password.

- You will be “flashed” when indexing is complete. (Don’t blink or you’ll miss it!)
- Go to the directory created for that document.
- Three files are created: Index.log, Index.txt, Index.rej, and separate documents are shown

Name ▲	Size	Type	Modified
index.log	1 KB	LOG File	8/18/2005 3:53 PM
index.rej	0 KB	REJ File	8/18/2005 3:52 PM
Index.txt	29 KB	Text Document	8/18/2005 3:49 PM
merge_1.doc	47 KB	Microsoft Word Doc...	8/18/2005 3:39 PM
merge_10.doc	45 KB	Microsoft Word Doc...	8/18/2005 3:39 PM
merge_100.doc	47 KB	Microsoft Word Doc...	8/18/2005 3:43 PM
merge_1000.doc	32 KB	Microsoft Word Doc...	7/19/2005 10:25 AM
merge_1001.doc	32 KB	Microsoft Word Doc...	7/19/2005 10:25 AM
merge_1002.doc	32 KB	Microsoft Word Doc...	7/19/2005 10:25 AM
merge_1003.doc	32 KB	Microsoft Word Doc...	7/19/2005 10:25 AM
merge_1004.doc	32 KB	Microsoft Word Doc...	7/19/2005 10:25 AM

Index.log

- Log file gives results of the process

```
ApplicationXtender 4.61.016
```

```
Processing File: \\ccsunet.clayton.edu\dfs\groupshares\finaid\imaging letters\award\index.txt
```

```
Log File: \\ccsunet.clayton.edu\dfs\groupshares\finaid\imaging letters\award\index.log
```

```
Rejection File: \\ccsunet.clayton.edu\dfs\groupshares\finaid\imaging letters\award\index.rej
```

```
Destination Application: B-R-TREQ
```

```
Skipping: 0 records
```

```
Then Loading: all records
```

```
Data Committed Every: 100 record(s)
```

```
Processing Initiated At: Thu Aug 18 15:52:44 2005
```

```
Records Committed: 242
```

```
Processing Completed At: Thu Aug 18 15:53:01 2005
```

```
Total Records Accepted: 242
```

```
Total Records Rejected: 0
```

```
Total Workflow Errors: N/A
```

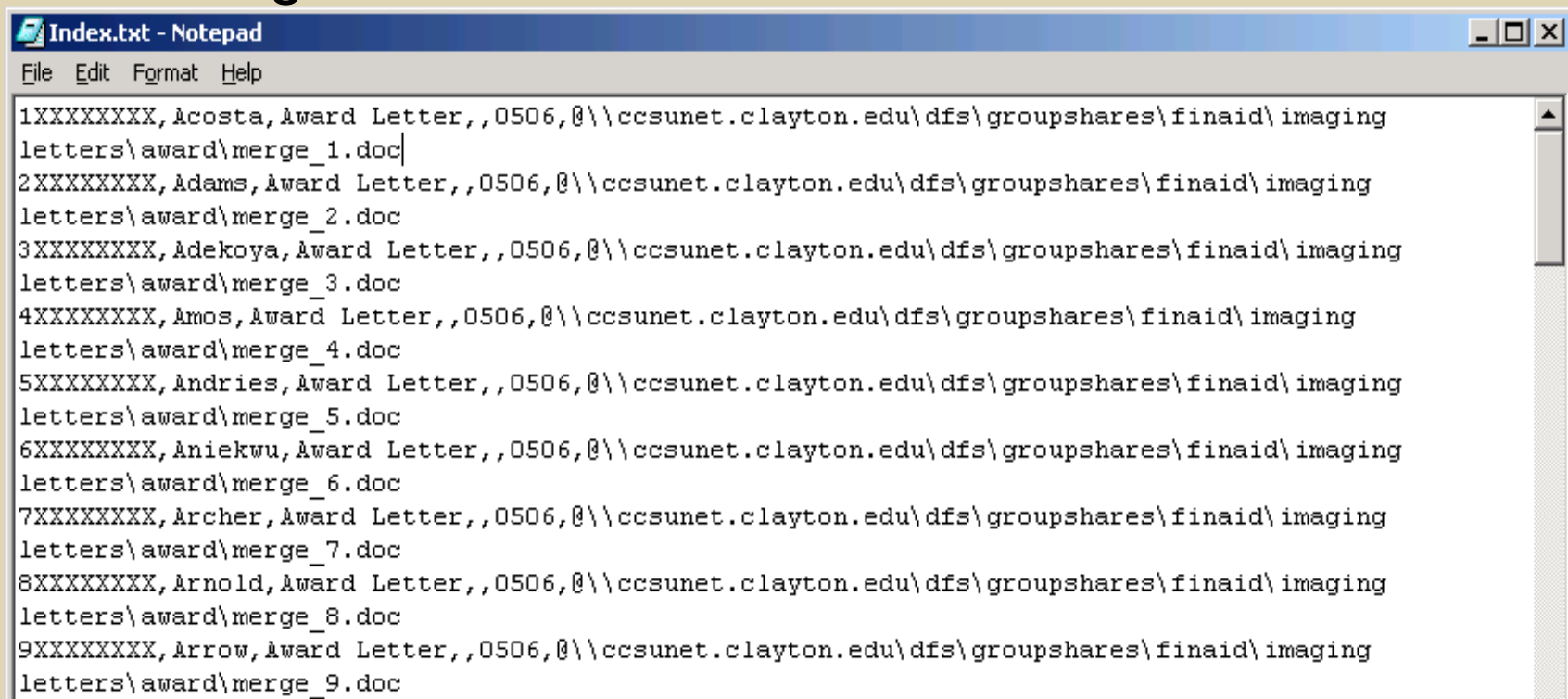
```
New Annotation Groups Encountered: 0
```

Index.rej

- Reject file lists records not indexed.
- Rejects are very rare and are usually caused by data entry errors in Banner.
- Records are listed by student. The Index.txt file will show corresponding document name.
- Rejected document can be imported and indexed individually just like any other document.

Index.txt

- Index file lists specific student information used for indexing



```
Index.txt - Notepad
File Edit Format Help
1XXXXXXXX, Acosta, Award Letter,,0506,@\ \ccsunet.clayton.edu\dfs\groupshares\finaid\imaging
letters\award\merge_1.doc
2XXXXXXXX, Adams, Award Letter,,0506,@\ \ccsunet.clayton.edu\dfs\groupshares\finaid\imaging
letters\award\merge_2.doc
3XXXXXXXX, Adekoya, Award Letter,,0506,@\ \ccsunet.clayton.edu\dfs\groupshares\finaid\imaging
letters\award\merge_3.doc
4XXXXXXXX, Amos, Award Letter,,0506,@\ \ccsunet.clayton.edu\dfs\groupshares\finaid\imaging
letters\award\merge_4.doc
5XXXXXXXX, Andries, Award Letter,,0506,@\ \ccsunet.clayton.edu\dfs\groupshares\finaid\imaging
letters\award\merge_5.doc
6XXXXXXXX, Aniekwu, Award Letter,,0506,@\ \ccsunet.clayton.edu\dfs\groupshares\finaid\imaging
letters\award\merge_6.doc
7XXXXXXXX, Archer, Award Letter,,0506,@\ \ccsunet.clayton.edu\dfs\groupshares\finaid\imaging
letters\award\merge_7.doc
8XXXXXXXX, Arnold, Award Letter,,0506,@\ \ccsunet.clayton.edu\dfs\groupshares\finaid\imaging
letters\award\merge_8.doc
9XXXXXXXX, Arrow, Award Letter,,0506,@\ \ccsunet.clayton.edu\dfs\groupshares\finaid\imaging
letters\award\merge_9.doc
```

It works!

It's easy!

It's free!

(Well, the macro anyway.)

Summary

- Imaging has enabled our staff to be more productive and to serve our students more efficiently. It saves time, money, and a LOT of frustration.
- The implementation of Banner Xtender Solutions was easy and we have found it to be very user friendly.
- Our staff says.....

- The most helpful thing about imaging is that 'gone are the days of an office full of file folders to review for awarding'. If a student had been around a long time some of those folders were quite thick and cumbersome.!!!!



- If another office such as Admissions is using imaging as well, it is quite interesting some times to see what data a student has given the Admissions Office that is different than what they've given the Financial Aid Office (allows you to play detective a little better). This has proven to be quite helpful when reviewing the FAFSA.



Before Imaging



After Imaging



QUESTIONS?

Thank You!

Pat Barton

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Please complete the on-line Evaluation Form

Evaluation Code 541

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