Banner Finance Xtender Quick Summary

Authorized Banner Finance users may access Xtender to view scanned invoice document images.

Accessing Xtender for the First Time (see the ITS Document Imaging Training manual Lessons 1-1 and 1-2 for detailed instructions for first-time sign on)

Important: First-time users must synchronize their Banner password with Xtender as follows:

1. Log in to Internet Native Banner (INB).
2. Click on the “BDM-Display Document” icon.
3. System prompts user to synchronize password with Banner. Click OK (cursor remains an hourglass).
4. The following message may display: Permission Denied to application B-G-ID. Close the window and proceed to the View Scanned Image of Vendor Invoice in Xtender instructions below.

View Scanned Image of Vendor Invoice in Xtender

1. Click on the WebXtender icon located my the mySLU Tools tab:

   https://myslu.slu.edu/

2. Data Source defaults to BANPRD. Enter your SLU Net ID at the User Name field and your SLU Net password at the Password field.
3. Click Login.
5. At Document ID, enter the Banner invoice document number (Ixxxxxxx or DPxxxxxx).

Users may retrieve Purchase Order invoice documents (Ixxxxxxx) and Direct Payment Voucher (eSeeDPV) documents (DPxxxxxx) by entering the eight-digit document code at the Document ID field. Users may also query with a wildcard (*) to display a list of document numbers (see Step 10).

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6. Scroll to the bottom of the screen and click **Submit**. You may have to maximize your browser window to access the Submit button.

7. The Query Results screen displays. Click on the **Page** icon. The scanned document displays.

8. For multiple-page documents, a display indicating “Page 1 of _” appears at the bottom of the document window. Click the **Next Page** or **Previous Page** icons (located in the tool bar directly above document image) to view each document page. Click the **Rotate Left** or **Rotate Right** icons, if necessary, to view documents that were scanned sideways. Click the **Print Current Page** icon to print the displayed document page, and repeat as necessary. Click the **Print Document/PDF Print** icon to print all document pages. Click the **Query Results** icon to return to the Query Results page, or click the **New Query** icon to perform a new query.
9. To print the document from the Query Results page, click the box to the left of the Banner document number. Then click the **Print Selected Documents** icon and **OK**.

![Query Results for Application 'B-F-DOCS'](image)

To perform another query, click the **New Query** icon.

10. Repeat Steps 5 through 9, as necessary.

**Note:** Users may also query by Transaction Date and Vendor Name. Please note, however, that the Query Results screen will display a list of all invoice documents for all University funds for the selected vendor and time period. However, users may only view the documents that agree with their fund/organization security. To enter transaction date(s), click the **Search Range** icon to the right of the **Transaction Date** field. A **Search Range** box displays. To search for documents processed in the month of January, for example, enter 01-January-2013 at **Value** and 31-January-2013 at **AND**. Please note the format of the dates (Day-Month-Year). Click **OK**. At **Vendor Name**, enter the vendor name using a wildcard, if necessary. The wildcard in Xtender is the asterisk (*). Click **Submit**.

![Query Criteria for Application 'B-F-DOCS'](image)

From the Query Results page: To print the documents that agree with your fund/organization security, click inside the box to the left of the **Document ID** field and then click the **Print Selected Documents** icon and **OK**.

From the document image window: To view the next document (based on your fund/org security) listed on the Query Results page, click the **Next Document** icon.

![CINTAS Arrow](image)

11. If you have questions, please contact Lisa Zoia (zoialm@slu.edu).

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