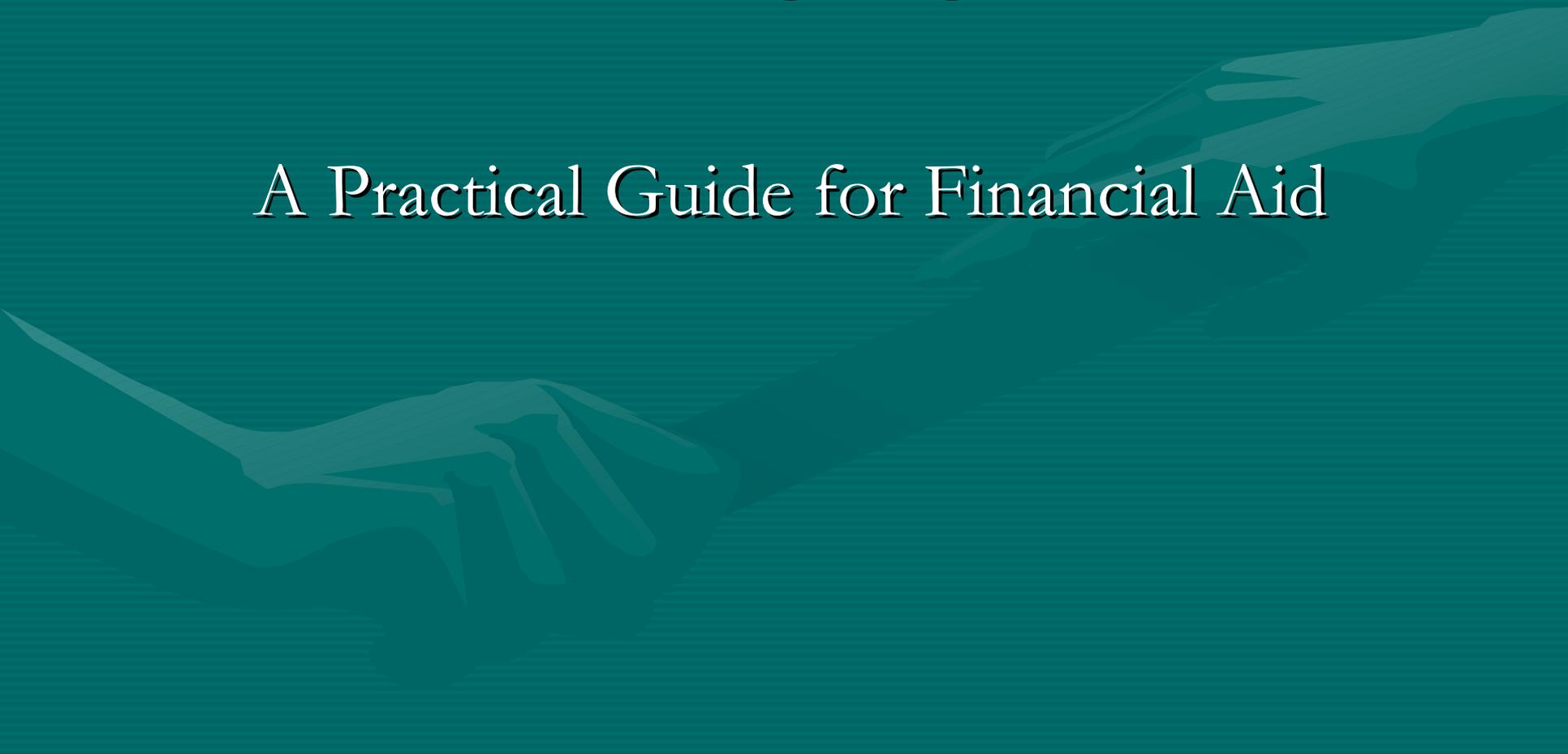


# Imaging:

A Practical Guide for Financial Aid



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# Comments from our newest counselor:

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).

# 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.

# WebXtender

- Most users view documents through WebXtender.
- WebXtender does not require any software installation on individual machines.
- We find it to be simple and user friendly.
- The persons scanning and indexing are critical people – everything depends on them!

# Query from Banner

- Depending on your setup, you can query information 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 **New Query** under Applications.
- Verify correct application is selected.
- Enter query information such as ID, Last Name, Aid Year, etc.
- Submit
- Double click document to open.
- Click **Query Results** under Applications to return to query results.

# More Complex Queries

- Search using an asterisk as a wildcard.
- Search using a list of values.
- Search using an expression.
- 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 under Applications.
- Click L next to field used for search.
- Enter list of values and click OK.
- Enter any additional search criteria for other fields.
- Submit

# Query by Expression

- Click New Query under Applications.
- Click R next to field to be used for search.
- Select type of comparison to be used.
- Enter value and click OK.
- Enter any additional search criteria for other fields.
- Submit

# Query by Expression

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

# Query Across Applications

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

# Query Across Applications

- Double click each field to be used in the search so that a ? is visible.
- Apply and enter a name for the query.
- Save
- Expand any application that was included in the query.
- Right click the new query and edit.
- Add search criteria and save.

# Run Cross App Query

- Expand any application included in the cross app query.
- Double click the query OR right click and select Run.
- Edit query or properties with right click.

# Verification with Imaging

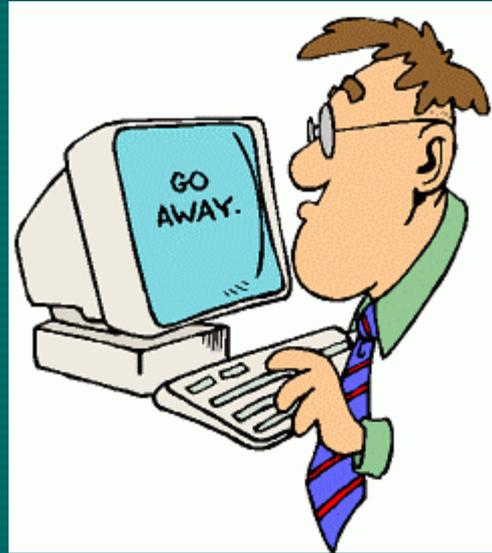
- Dual monitors are a necessity!
- RNANA is brought up on one screen and the imaged document is brought up on the other screen for easy comparison.
- Messages or comments can be added in Banner while still viewing the document.
- Documents can be marked or highlighted as necessary and text can be added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

# E-mailing Documents

- Imaged documents can be e-mailed as an attachment.
- The technical side may need to set up a few things and you will need to register your e-mail address once.
- A page or an entire document can be e-mailed as an attachment or a hyperlink.

# Importing a Document

- Click on Applications.
- Right click on application to be used.
- Select New Document.
- Browse for document to import.
- Select document.
- Click Upload.
- Index document.



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

This is my **VERY**  
favorite part!

# Automatic Indexing

- Letters are generated out of 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.
- The same macro is used for all letters with minor changes to specific lines of information.

```

• 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 = "\\ccsunet.clayton.edu\dfs\GroupShares\FinAid\Imaging Letters\MIL\"
• 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(11) & "," & .DataSource.DataFields(6) & ",MISSING INFO LETTER,,0506,@" & 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

```

# The Macro

- Create a specific folder for each type of letter.
- Create a specification list under Index Image File Setup.
- Customize path for each letter type.

lsPath =

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

# The Macro

- 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,@" & lsPath & "merge_" & liCount  
& ".doc"
```

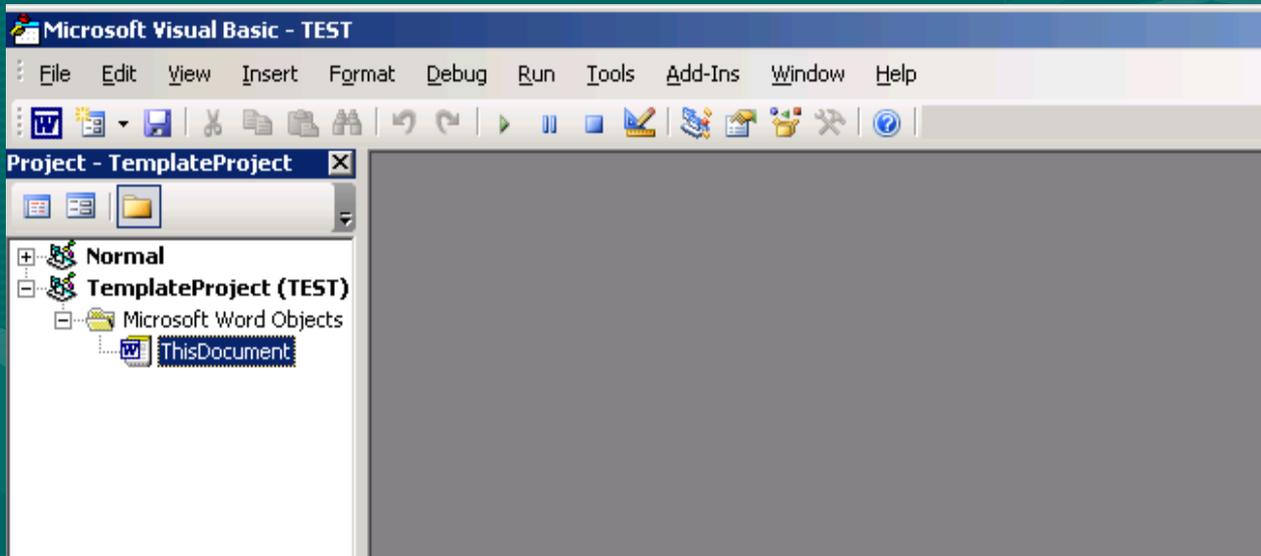
# The Macro

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

```
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"
```

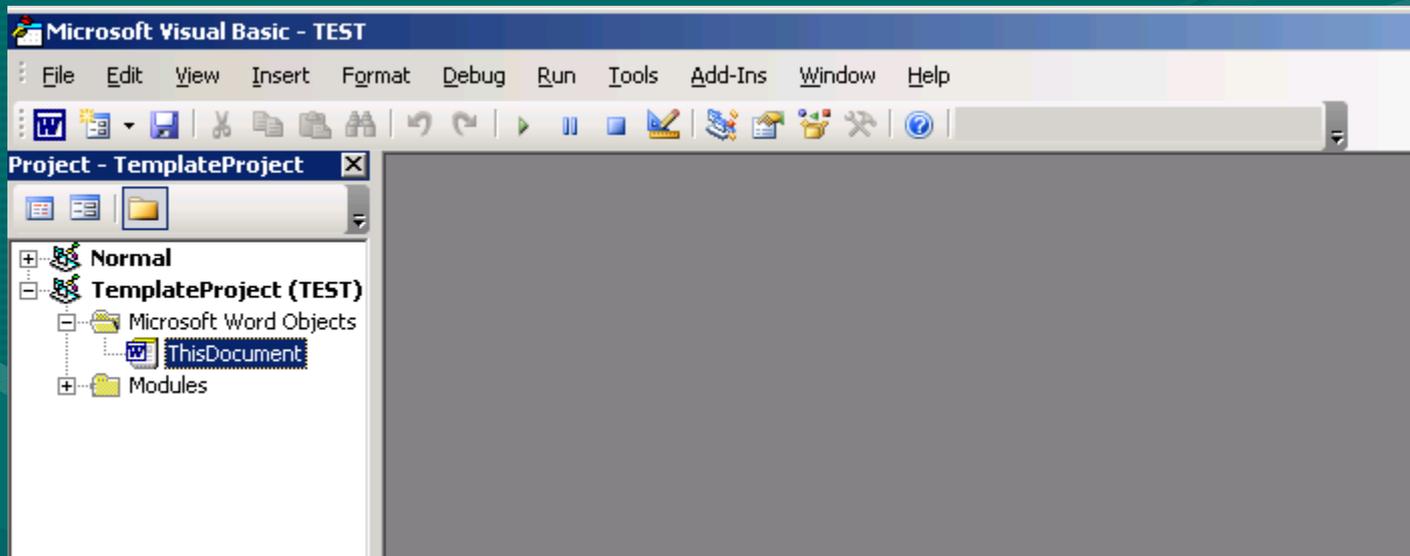
# Adding the Macro

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



# Adding the Macro

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



# Adding the Macro

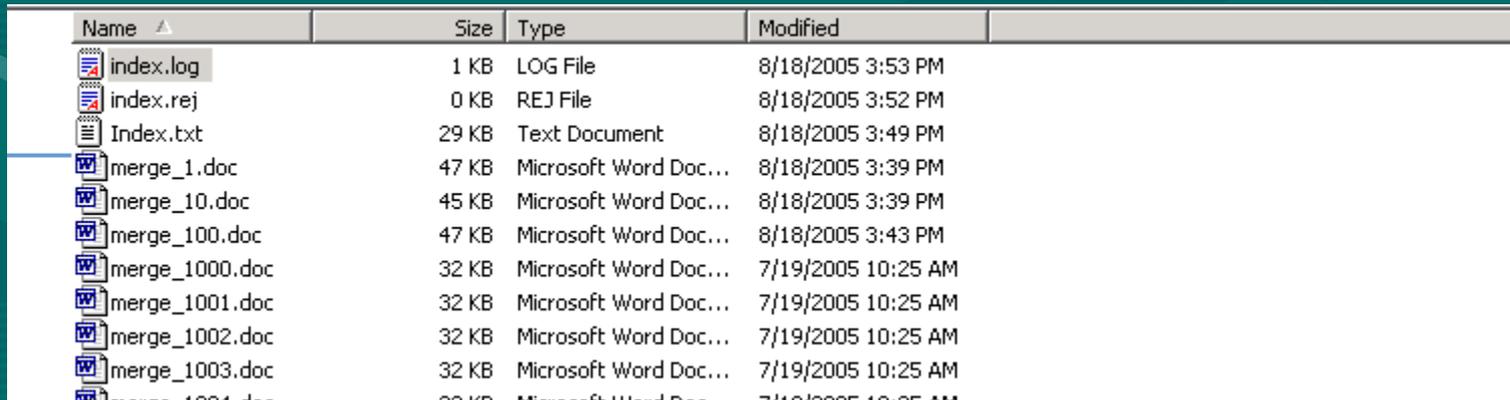
- Expand Modules.
- Double click NewMacros.
- Edit macro as needed.
- Save
- That's it!

# How it Works

- 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.

# How it Works

- 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
```

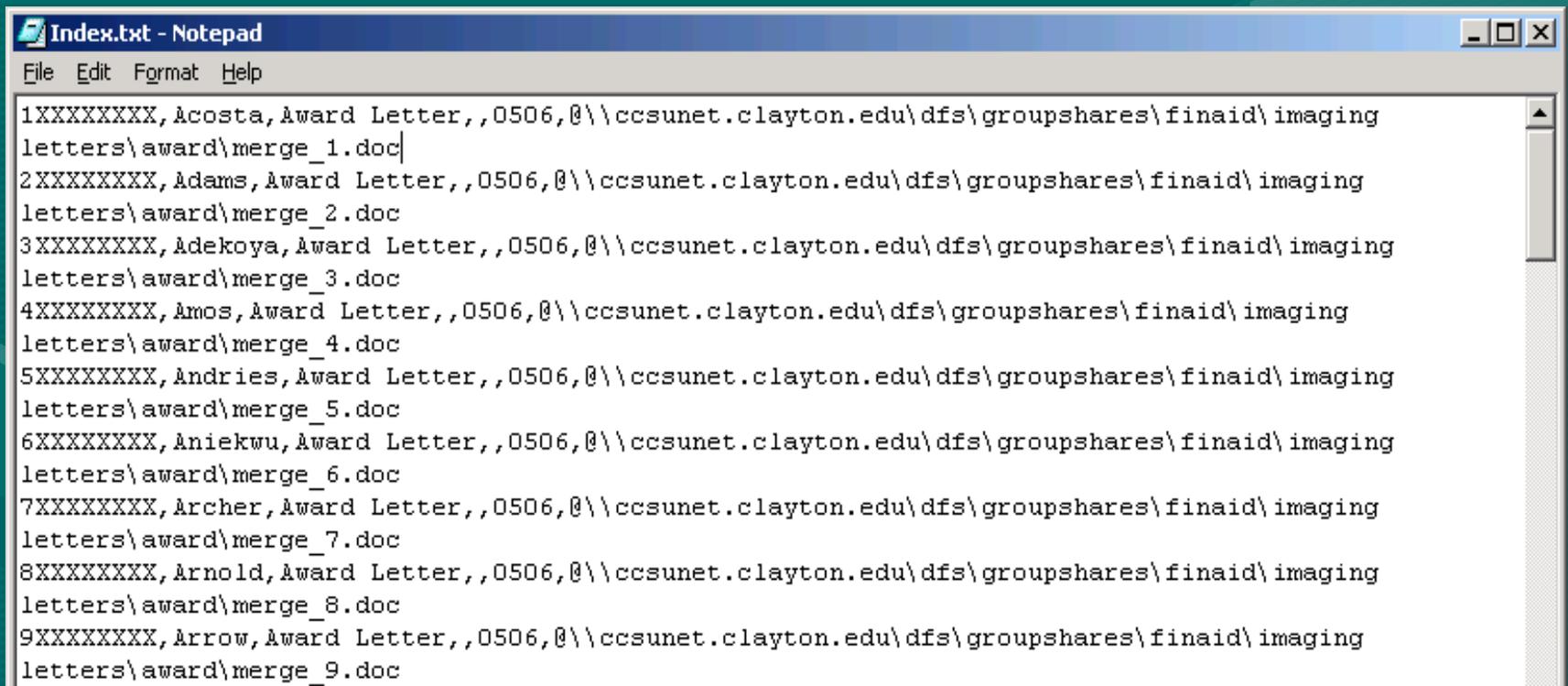
```
New Annotation Groups Encountered: 0
```

# 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!



# Staff Comments About Imaging

- It makes for a more productive office. There's no more searching and pulling files before meeting with students.
- No more searching for lost files and lost documents! The information is right at your fingertips when you are talking with students either in person or by phone or email. Imaging is wonderful - such a timesaver and lifesaver!

- 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!!!!



- It is also fun: There are numerous features and graphics that allow you to highlight, point to data, and comment right on the document.

- 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?

