# Viewing a Financial Services Document in Xtender

Financial Services Documents include, but are not limited to, documents that begin with: BD, BG, DA, GJ, GR, JE, PB, PD, PJ, PR, PY, RA, RM, SJ, UB, UD, UR, UY, UZ, VB, VD, VJ, VR, and VY.

## Request Access:

To view a Financial Services document, you must first request access to Xtender. To request access to Xtender:

1. Log into PiratePort.
2. Click on Banner Security Request.
3. On the left hand side under options click "Request Security".
4. Under the header Banner Security Request, click on the word "Xtender".
5. Under Finance, select "FS – DOCS AND BO-TRANSFERS"
6. Under Privilege, select "View Print"
7. Click "Submit"



8. After clicking submit, you should see a check mark in the box beside Xtender. In the comments section, type "FS-Docs and BO-Transfers for viewer access"
9. Click "Submit"



10. A box will pop up asking if you agree to terms, answer accordingly to continue.
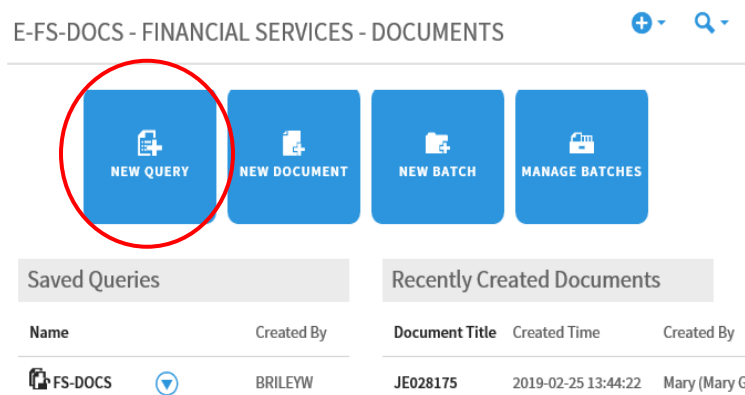
11. Once your request is submitted AND approved by your supervisor, it may take up to a week for access to be granted. Your supervisor will receive a notification to approve once your request is submitted.

## Viewing a Financial Services Document in Xtender:

1. Go to https://xtendweb.ecu.edu/AppXtender and log in.
2. On the left hand side under Applications, click "E-FS-DOCS"

**Applications**

‣ B-F-DOCS
‣ B-G-ID
‣ E-FS-CI
‣ E-FS-DEPOSITS
‣ **E-FS-DOCS**
‣ E-FS-FUNDAUTH
‣ PLEASE-CONSIDER-THE-ENVIRONME

3. Click "New Query"

E-FS-DOCS - FINANCIAL SERVICES - DOCUMENTS

| NEW QUERY | NEW DOCUMENT | NEW BATCH | MANAGE BATCHES |

Saved Queries | Recently Created Documents

| Name | Created By | Document Title | Created Time | Created By |
| FS-DOCS | BRILEYW | JE028175 | 2019-02-25 13:44:22 | Mary (Mary G |
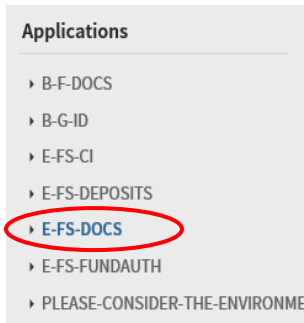
4. Type the document number in the search box and then click "Run"

New Search - E-FS-DOCS

**Search Criteria**

Enter a search term in the index fields to filter your results.

| DOCUMENT NUMBER | RA016401 |
| BATCH DATE | |
| DOCUMENT TYPE | Multiple select / Input and enter |
| DEPARTMENT | Multiple select / Input and enter |
| DOC REF | |
| ACTIVITY DATE | |
| DISPOSITION DATE | |
| [Title] | |
| [Subject] | |

RUN    SAVE    CANCEL

5. The document will be displayed