

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"

Xtender Security Access Form

Application

BSOM: NONE

FINANCE: E-FS-DOCS

FINANCIAL AID: NONE

HUMAN RESOURCES: NONE

NEUROLOGY: NONE

STUDENT: NONE

OTHER: NONE

NOTE: Application selection is required and only one application can be selected per request. For access to BSOM applications, the requester must have completed HIPAA training. For access to Student applications, the requester must have taken the FERPA quiz.

Privilege

SELECT PRIVILEGE: NONE, View Only, View-Print

NOTE: Privilege selection is required and only one privilege can be selected per request.

cancel 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"

Banner Security Request

Request Access for: Finance Financial Aid Human Resources Student Xtender eCommerce

Comments:
Use this area to enter any relevant job information or to request additional access that is not offered in the module requirements or on this form.
FS-Docs and BO-Transfers for viewer access

Sensitive Data Access

SSN
 PIN
 Termination/LOA Reason
 OneStop ECU ID Search

* 200 character max

clear submit

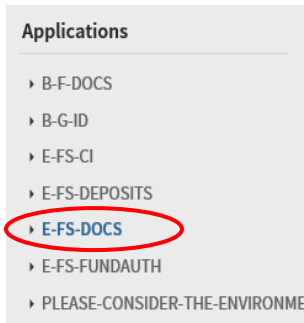
10. A box will pop up asking if you agree to terms, answer accordingly to continue.

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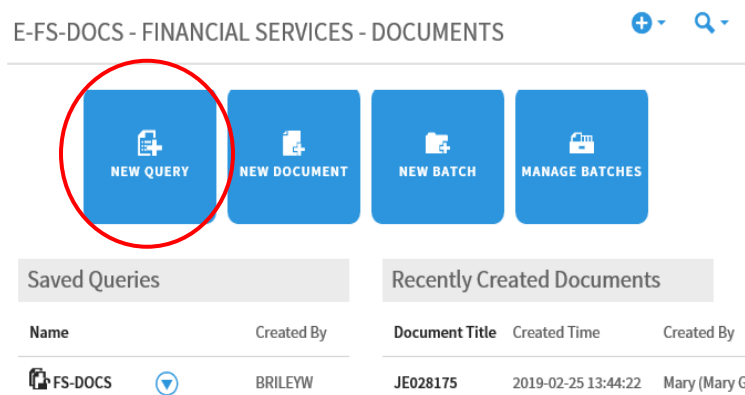
11. Once your request is submitted AND approved by your supervisor, it may take up to a week for access to be granted. Your supervisor will receive a notification to approve once your request is submitted.

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"



3. Click "New Query"



4. Type the document number in the search box and then click "Run"
New Search - E-FS-DOCS

The screenshot shows the 'Search Criteria' form. It includes a search box for 'DOCUMENT NUMBER' containing the value 'RA016401'. Other fields include 'BATCH DATE', 'DOCUMENT TYPE', 'DEPARTMENT', 'DOC REF', 'ACTIVITY DATE', 'DISPOSITION DATE', '[Title]', and '[Subject]'. At the bottom, there are three buttons: 'RUN' (circled in red), 'SAVE', and 'CANCEL'.

5. The document will be displayed