Banner Document Management Suite (BDMS)
Viewing, Printing and Scanning Documents
February 2016
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Accessing and Working with BDMS/AppXtender

Synchronizing Your Passwords

Before working with BDMS, you must sign into Banner to synch your Banner and BDMS passwords. This simple process will only take a minute or two.

1. Sign into Banner as usual or go to www.tnstate.edu/banner and click the Banner PROD link
2. Banner will open
3. Click the Display Document icon located on the toolbar

1. A message will display indicating that your password has been synchronized
2. Click the OK button
Logging In

You will use software called ApplicationXtender (AppXtender) to view scanned documents. There are two ways to access AppXtender.

Logging in From Browser

You are able to go directly to the AppXtender web page to sign in.

1. Go to [http://bdmsprod/AppXtender/Login.aspx](http://bdmsprod/AppXtender/Login.aspx)
2. Enter your User Name and Password (this will be your Banner User Name and Password)
3. Click the Login button
Banner Document Management Suite (BDMS) – Viewing, Printing and Scanning Documents

Logging in From Banner

1. Click on the Display Document icon on the toolbar
2. BDMS will open*
   *if you are in a record in Banner, BDMS will open to the associated document

Retrieving Documents

When you sign into BDMS from the link, you will be taken to the Application Page; you will only see applications that you have been granted access to.

Application List

When you sign into AppXtender, you will only see the applications that you have access to. Think of an application as a digital file cabinet.

1. Menu bar and Toolbar
   a. Use these features to work with Queries and settings
2. Application List
   a. List of applications that you have access to
Creating Query

1. Right Click on the Application you want to query
2. A list will open
   a. Select New Query
3. Enter your search criteria
   a. Use Pull Down List if available
   b. The wildcard is the asterisk *
4. Click Submit
5. Click the Open Document icon to view the document
   c. Note the information to help you locate your document when multiple documents are available
      i. ID (T-Number), Document Type, Last Name, etc.
6. Your document opens
Working with Your Document

Image Toolbar

Depending on your access, you will see multiple icons on the toolbar to help you navigate through AppXtender. We will focus on the basic icons available to users with view-only access.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Icon" /></td>
<td>Fit to Icons</td>
</tr>
<tr>
<td><img src="image2" alt="Icon" /></td>
<td>Rotate Icons</td>
</tr>
<tr>
<td><img src="image3" alt="Icon" /></td>
<td>Zoom In and Out Icons</td>
</tr>
<tr>
<td><img src="image4" alt="Icon" /></td>
<td>Magnify Icon</td>
</tr>
<tr>
<td><img src="image5" alt="Icon" /></td>
<td>Pan Mode Icon</td>
</tr>
<tr>
<td><img src="image6" alt="Icon" /></td>
<td>Print Current Page Icon</td>
</tr>
<tr>
<td><img src="image7" alt="Icon" /></td>
<td>Print Current Document Icon</td>
</tr>
<tr>
<td><img src="image8" alt="Icon" /></td>
<td>Next and Previous Page Icons</td>
</tr>
<tr>
<td><img src="image9" alt="Icon" /></td>
<td>Refresh Icon</td>
</tr>
<tr>
<td><img src="image10" alt="Icon" /></td>
<td>Page Menu Icon</td>
</tr>
</tbody>
</table>
Printing Documents

There are multiple ways to print documents in BDMS. You can print directly from your query results, or you can print when you have pulled up a document.

Initial Set Up

Before you can print multiple documents from the Query Results page, you will want to make sure that the proper components are installed; otherwise this feature will not work correctly.

1. Click the Help Menu Item
   a. Do this from the Application list page

2. Select Check Installed Components

3. Click inside the gray area to activate the install statuses

4. The Adobe Component will say Not Installed
5. Click the Computer/Disk icon for the for each component (one at a time)

6. You will be prompted to Run or Save the file

7. Select Run

8. Follow all of the prompts until finished

9. Continue through the list until all components are installed

From Query Results – Single Document

1. Check the Select Checkbox to the left of the record

2. Click the Print Selected Documents icon

3. Follow your printer prompts
From Query Results – Multiple Documents

1. Check the Select Checkboxes to the left of the records to print
2. Click the Print Selected Documents icon
3. Follow your printer prompts

From Document - Single Page

1. With the document open, select the Print Page icon from the Image Toolbar
2. Your printer options window will open, follow the prompts

From Document – Entire Document

1. With the document open, select the Print Document icon from the Image Toolbar
2. Your printer options window will open, follow the prompts
Adding a New Batch – Batch Import

Using the Batch Import function in AppXtender takes you to the indexing page where you can immediately index your document(s).

1. **Right Click** on B-F-RASP – BANNER RESEARCH AND SPONSORED PROGRAMS
   a. An options list will open
2. **Select Batch Import**

   ![Batch Import Option](image)

   ![Batch Import Dialog](image)

**New Batch Document**

<table>
<thead>
<tr>
<th>Application</th>
<th>B-F-RASP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Batch Name</td>
<td>Test 11234</td>
</tr>
<tr>
<td>Memo</td>
<td>Batch created at 2016-02-15 18:00:18</td>
</tr>
</tbody>
</table>

*[Required Fields]*

[Thin client upload]

[Next] [Cancel] [Help]
3. Enter the **Batch Name**

4. Click the **Next** button

5. Select the **Page Menu** icon
   a. Select **New Page**
   b. Select **Import File**
   c. Select **Append**
6. The **Import File** window will open
   a. Locate your document
7. **Click Open**
8. Your document will load – refer to the **Indexing Instructions located on page 13** to index your document
Scanning Documents

9. If necessary, select your scanner by settings by selecting the Scanner Setup icon a.

10. Click the Scan button a. Your batch will scan

Indexing Documents

1. After your documents have scanned, select the New icon
2. Enter the **Document ID, Document Type and Transaction Date**
3. Click **Save**
New Page, Same Document

1. The next page will display

2. Select the **Attach Current Page** icon

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Banner Document Management Suite (BDMS) – Viewing, Printing and Scanning Documents
3. Click **Save**
New Page, Different Document ID or Document Type

1. Select the **New** icon
2. Enter the Document ID, Document Type and Transaction Date

3. Click Save

4. In this example we will select the Attach all Pages icon
5. A message will appear asking you to confirm that you want to attach all pages
6. Click OK

7. A confirmation page will appear confirming that all pages have been indexed
8. Make your selection
Adding a New Batch – Batch Index

Using the Batch Index feature allows you to scan documents to your computer if you plan on indexing the document(s) at a later time.

1. Right Click on **B-F-RASP – BANNER RESEARCH AND SPONSORED PROGRAMS**
   
   b. An options list will open

2. Select **Batch Import**

3. The New Batch Document window will open
4. Enter the Batch Name in the **Batch Name** field
5. Check the **Thin client upload** button
6. Click **Next**
7. The Import New Page window will open
8. Click the **Browse** button to locate the file in your computer
9. After locating your file, click the **Upload** button

10. Note that the **File Path** field is now blank. You can:
    a. Select **Browse** to import another document
    b. Select **Cancel** to close out of the page
Locating and Importing Your Documents

1. **Right Click** on **BF-RASP – BANNER ESEARCH AND SPONSORED PROGRAMS**
   a. An options list will open
2. **Select** **Batch Index**

### Application Batch List

<table>
<thead>
<tr>
<th>Batch 1 -  2 of 2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
</tr>
<tr>
<td>123</td>
</tr>
<tr>
<td>Sample 2</td>
</tr>
</tbody>
</table>

**Best Practice:**
Name your document so you will know what it is

3. The Application Batch List will open
4. **Select the Open Batch for Indexing** icon
5. The Indexing page will open
6. Follow the steps in the Indexing Documents section (starting on page 11) of this document

Logging Out

If is very important that you log out of AppXtender, not just close the window. You may get locked out of your account or other issues may occur if you do not Log Out.

1. Select the File Menu and then the Logout option
2. Select the Logout icon \[\text{Logout icon}\] from the Toolbar