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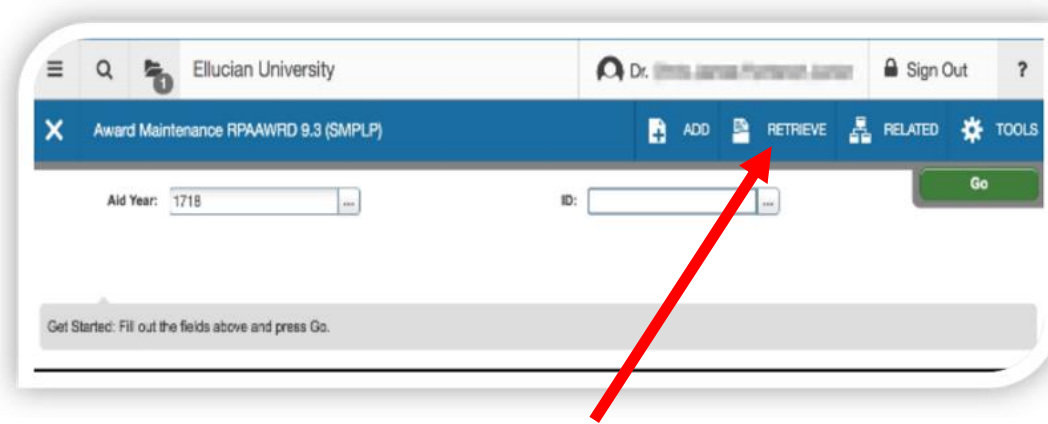# Banner Document Management

Scanning & Indexing in Web Access

April 02, 2019

Table of Contents

Log into Banner Document Management (BDM) through Banner 9

Log into Banner 9 then navigate to a Banner 9 page. Then click on the Retrieve button to launch BDM

BDM Welcome Page

Once you have connected to BDM from Banner 9 page, you will be taken to the BDM Welcome page. This page provides the entry point into BDM processing. The Applications column will display all BDM applications you have access to via a click of the Application you wish to process. Whatever application(s) you see when you launch BDM the navigation technique will be the same
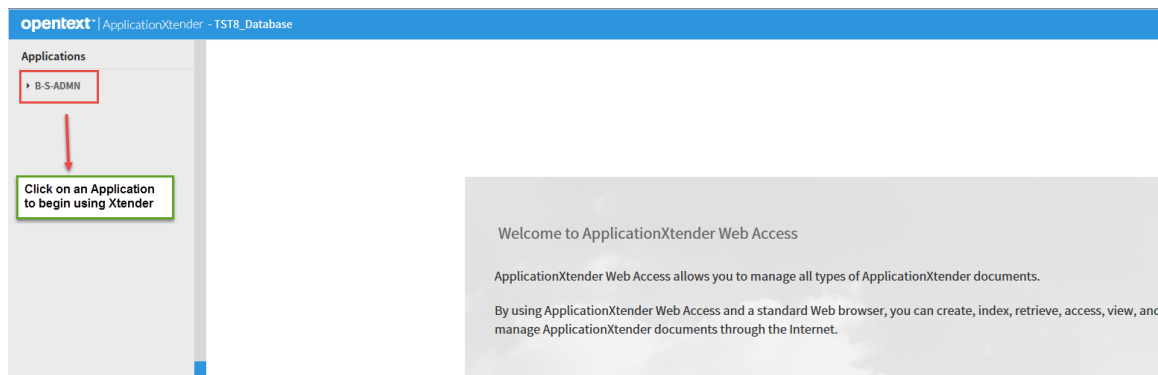
OR

When you select Retrieve you may see a BDM screen with "No Document Found" or a Query result.
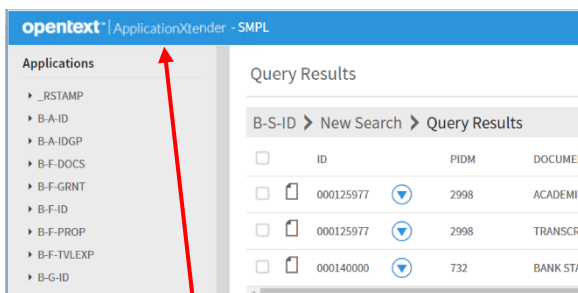
Click on the word **"ApplicationXtender"** in the blue header bar to navigate to the main OpenText Screen or click on a BDM application
That you want to access.

Select the application that you want to work with and select one of the function boxes.
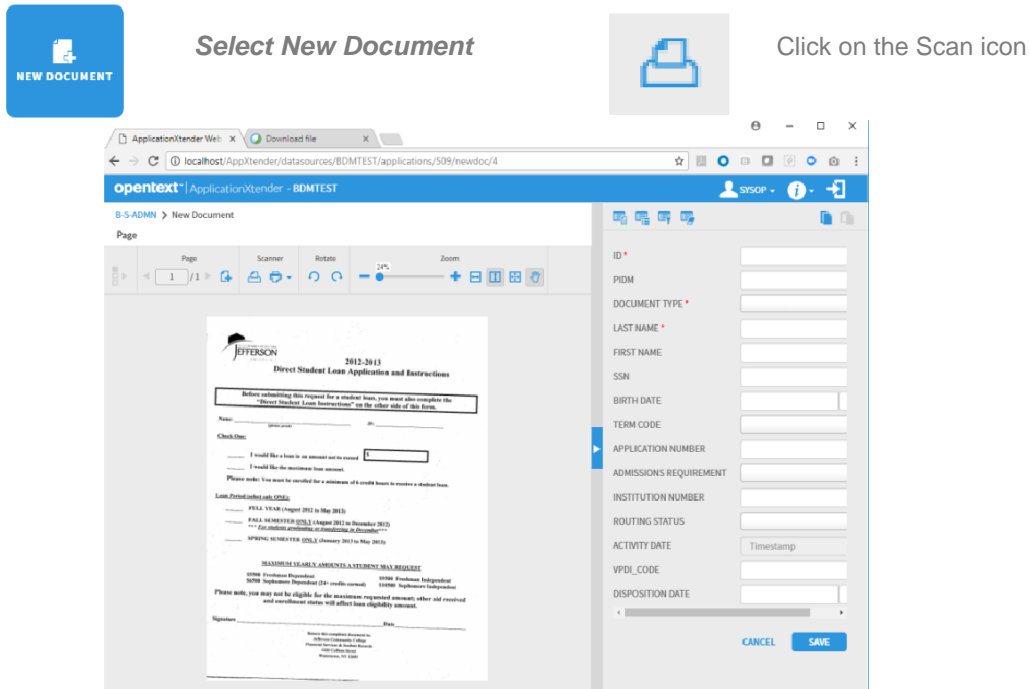
New Query - Opens the document search window

New Document – Scan or import documents and index to one value

New Batch – Scan or import documents into a batch and each page

Individually **Manage Batches** – Opens list of batches that need to be indexed

SCAN & INDEX a DOCUMENT

 Select New Document   Click on the Scan icon

After the documents finish scanning the index box will be displayed.
All the scanned documents will be indexed to this information

Banner Document Manager End-User Guide

![ellucian logo]

SCANNING A BATCH

Select New Batch

Upload New Batch

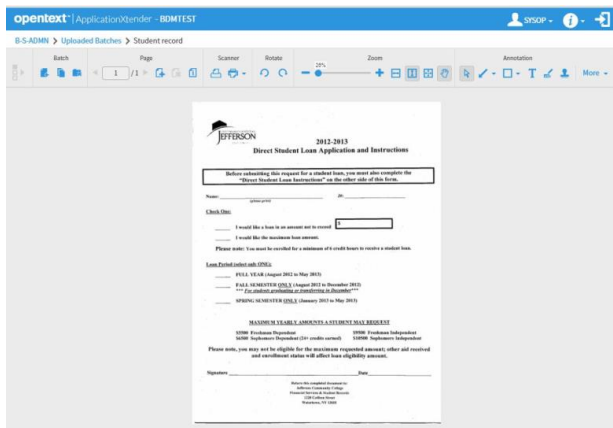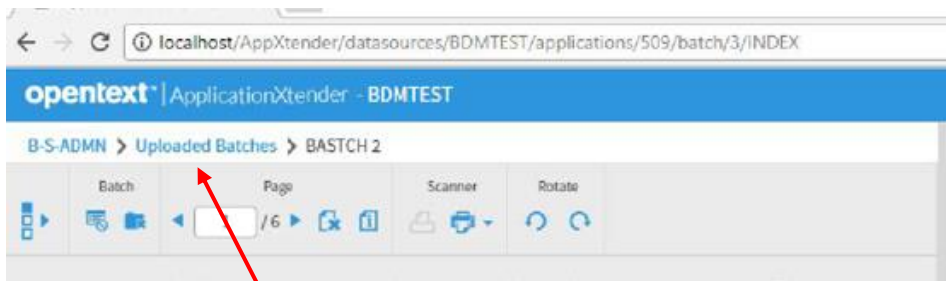|	
Application*	B-S-ADMN
Name*	STUDENT RECORDS
Description	Do these ASAP

CANCEL   CONTINUE

1. Select the application that you want to scan into.

2. Enter the batch name

3. Optional – Enter a note or description

    Click on the scan icon

The documents will scan and display in Banner Document Management.

Click on Upload batches to see the batch list

Manage Batches

B-S-ADMN > Uploaded Batches

	Name		Description	Create Time ▼	Created By ▼	Pages	State
☐	Student record	⊙	do first	2018-03-08 15:15:47	SYSOP	1	Idle
☐	BASTCH 2	⊙		2018-03-08 09:41:20	SYSOP	6	Idle
☐	BATCH 1	⊙		2018-03-08 09:40:08	SYSOP	19	Idle

Drag & Drop from Desktop
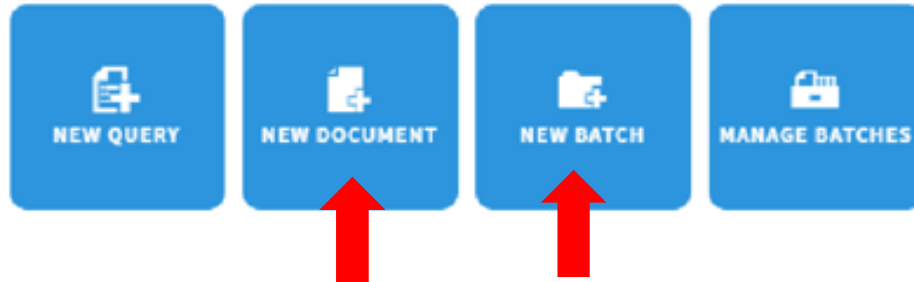
Select New Document or New Batch
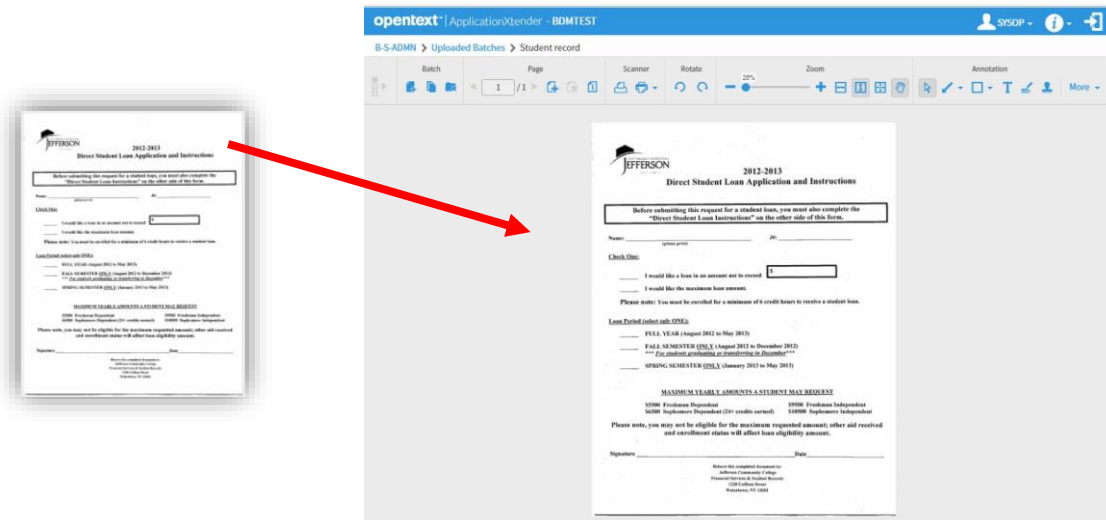
Hold down left mouse button on document or documents on desktop
And drag in drop into application screen.

If you selected:

New Document than you drag in the documents and will need to index the documents at this time.

New Batch then you will enter a batch name. drag in the documents and you can index the documents at a later time, by going to manage batches.

INDEXING A BATCH OF DOCUMENTS

MANAGE BATCHES   Select Manage Batches to index documents

Double click on the batch name or select the blue arrow and click on Index.

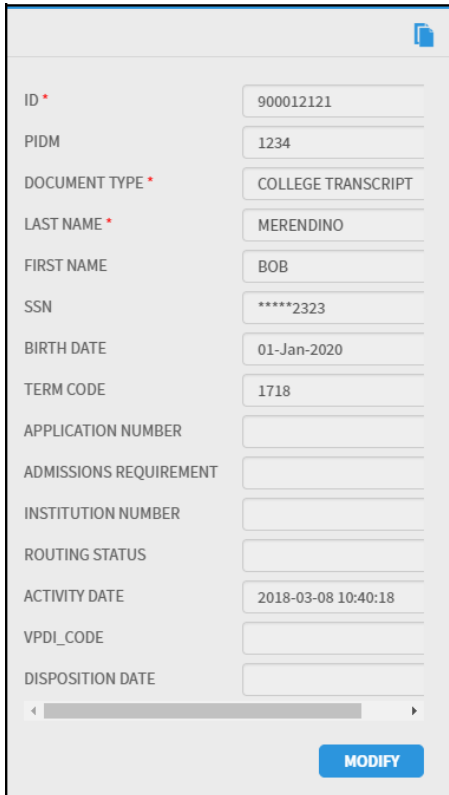Enter the Banner ID into the ID field

- **PIDM**
- **LAST NAME**
- **FIRST NAME**
- **SSN**
- **BIRTH DATE**

Will auto populate for that Banner ID

The document and index screen will appear.

You will have to select the **Document Type** from the drop-down list and when you click on save, the **ACTIVITY DATE** will populate with today's date. All other fields are optional.

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When Too Use Modify Index

ID *	900012121
PIDM	1234
DOCUMENT TYPE *	COLLEGE TRANSCRIPT
LAST NAME *	MERENDINO
FIRST NAME	BOB
SSN	*****2323
BIRTH DATE	01-Jan-2020
TERM CODE	1718
APPLICATION NUMBER	
ADMISSIONS REQUIREMENT	
INSTITUTION NUMBER	
ROUTING STATUS	
ACTIVITY DATE	2018-03-08 10:40:18
VPDI_CODE	
DISPOSITION DATE	

MODIFY

Note: **Do not use the Modify button during indexing**

"Modify is for mistakes"

If you come across a document during a query that has been indexed incorrectly or the data needs to be changed then you click on modify and make the change.

After indexing a document, the Modify button will be active.
Do not click on this button while in the indexing screen.

When modify is selected it will only let you change fields that are not read only.
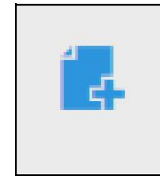
![ellucian.]

IMPORTANT INDEXING RULES

* **THREE IMPORTANT RULES** *

1. If the document is the second page of the previous document, click on the single page blue arrow.

2. If the document belongs to the same Banner ID #

   as the previous document, but the Document Type is different then click on the "Create Another Document"

Then:

A) Click on the "Last Modified Index" icon
   The fields will auto populate with the Previous index values.

B) Select the new document type
   from the drop down, list and
   Click on save

3. If the document belongs to a different Banner ID # click on the "Create Another Document" icon and enter in the new ID and Document Type and then click save.

![ellucian logo]

INDEXING BY LAST NAME, FIRST NAME, SSN OR DOB

ID *	
PIDM	
DOCUMENT TYPE *	
LAST NAME *	
FIRST NAME	
SSN	111111111
BIRTH DATE	
TERM CODE	
APPLICATION NUMBER	
ADMISSIONS REQUIREMENT	
INSTITUTION NUMBER	
ROUTING STATUS	
ACTIVITY DATE	Timestamp
VPDI_CODE	
DISPOSITION DATE	

CANCEL   SAVE

If the Banner ID #is not known, you can index by any of the following or a combination of following Last Name, First Name, or SSN# or DOB

Enter the information into the field and select the Key Reference and index icon

Select Index

	ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE	TERM CODE
	901234567			MOUSE	MICKEY	*****1111	02-Feb-2020	
⇨	901234567		COLLEGE TRANSCRIPT	MOUSE	MICKEY	*****1111	02-Feb-2020	

The data will display based on the information entered. Always select the row where the document type is blank unless you want to append the current document to the document type that is listed.

|	
DOCUMENT TYPE *	
LAST NAME *	
FIRST NAME	COLLEGE TRNSCRPT
SSN	CONTRACT INFO
BIRTH DATE	DEATH CERTIFICATE
TERM CODE	EMAIL
ROUTING STATUS	ENROLL VERIFICATION
ACTIVITY DATE *	HOLD INFO
	PROOF OF CITIZENSHIP

Select the document type from the dropdown list and click on SAVE

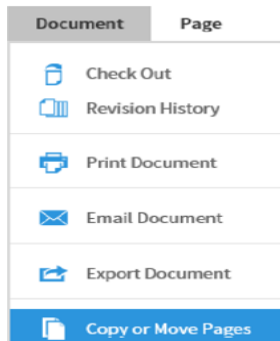# COPY OR MOVE A DOCUMENT

Examples of using Copy/Move Feature:

1. One or more pages of a multiple page document were indexed to the wrong person

2. Multiped documents indexed to one index value need to be sent back to the batch list, so that each page can be indexed separately
.
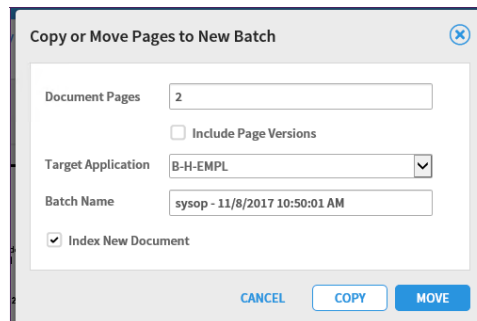3. A page that is indexed needs to also be indexed to another person

STEP 1
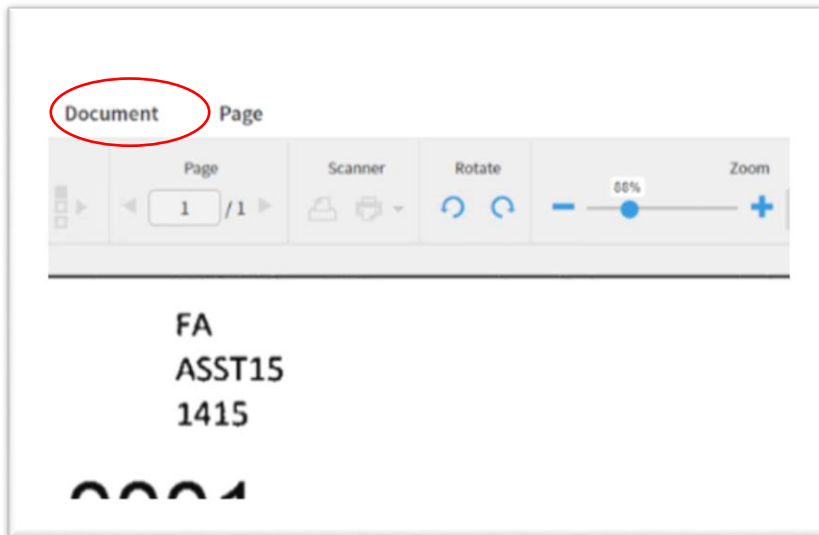
Query the document that has a page the needs to be moved to another person, then select **Document**

STEP 2   **STEP 3**

Select Copy or Move   Select the document pages to Copy or Move
                                     Select the Target application
                                     Check index a New Document, then select COPY or MOVE

The document will display with the Index box. Index the page to the new value than click save.

IMPORTANT: if you don't check the Index a New Document box the documents selected with go back to the batch list and will be indexed with the batch name {user name – date - time}

MOVE DOCUMENT BACK TO BATCH LIST

To move pages back to the batch list do Steps 1 and 2 on Step 3
- ☐ Enter a value in the Batch Name field or leave default
- ☐ Do not check the Index New Document box
- ☐ Click Move

Manage Batches					🗄 ▾ ➕ ▾ ↩ ▾
B-H-EMPL ❯ Uploaded Batches					
☐ Name	Description	Create Time ▾	Created By ▼	Pages	State
☐ sysop - 11/8/2017 10:54:33 AM	🔽	2017-11-08 10:54:39	SYSOP	1	Idle

The documents will be moved back to the batch list for re-indexing

COPY A PAGE

To make a copy of a page and index to another batch do Steps 1 and 2 on Step 3
- ☐ Check the Index New Document box
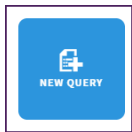- ☐ Click on COPY
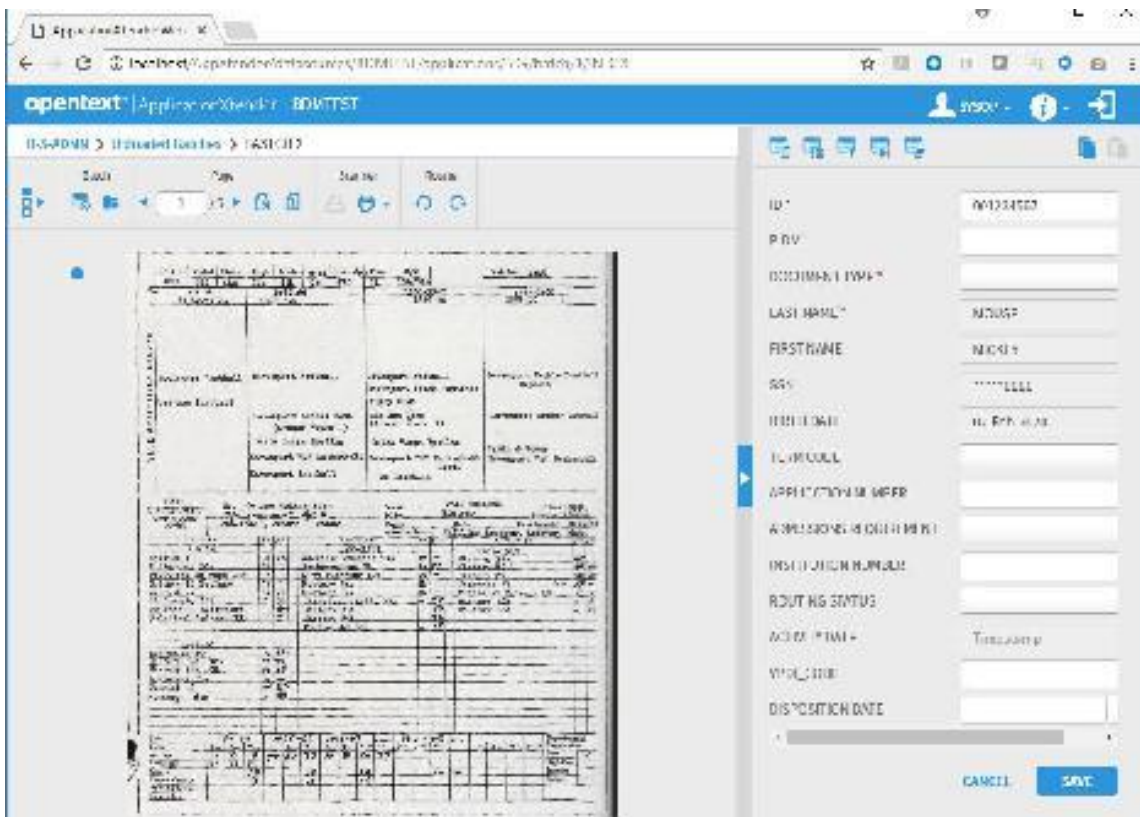
The document will display with the index box. Index the document to the new value and click on SAVE.

QUERY IN WEB ACCESS
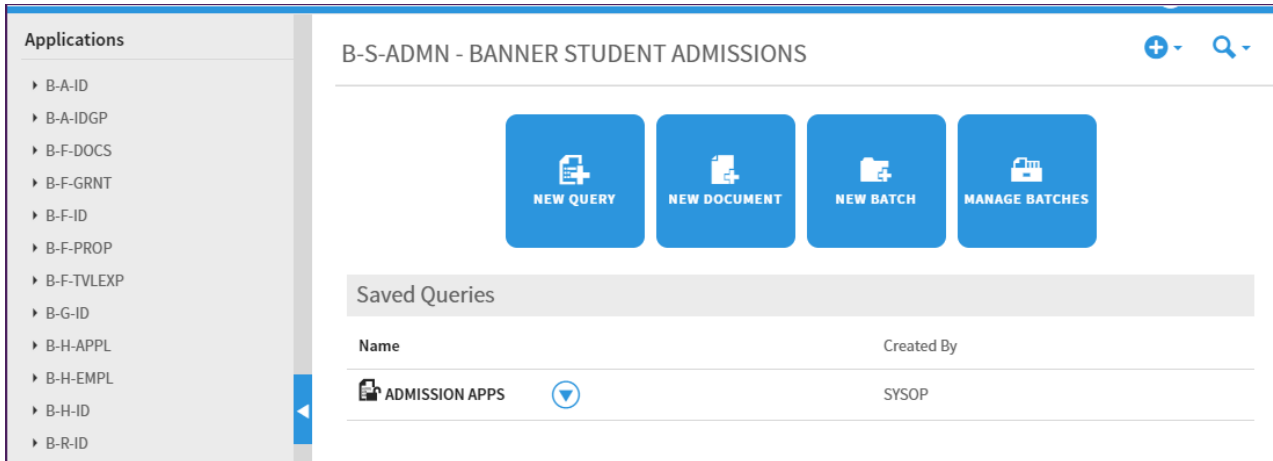
NOTE: When the page opens you will see the applications you have access to on the left and you might see saved queries.

Select the NEW QUERY button

You have four search options:

1.   BASIC SEARCH - Enter one or more indexes into the fields and click on RUN. The Query results list will display for more than one document. Click on the line to display the image.

2.   SEARCH RANGE -The search range will do a search based on the criteria entered. Select the icon and a search range box it will display with a list of Types Comparisons (e.g. Between, Great than, Less than)

3.   LIST SEARCH -The list search will let do a search based on a list of information entered.

4.   SAVED QUERY – A query that is saved and you can repeat.

HOW TO CREATE A SEARCH RANGE

Search Criteria

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

ID	
PIDM	
DOCUMENT TYPE	Multiple select / Input and enter
LAST NAME	

Open an Application query screen and select the search range icon next to the field that you want to query on.

Range Search ⊗

Type of Comparison	Between ▾
Value	
And	

CANCEL   **OK**

Choose a Type of Comparison And enter the VALUE and Click on OK. Then select RUN.

B-H-EMPL ❯ New Search ❯ Query Results

		ID		PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE	POSITION
☐	☐	FLACC0052	▼	89915	VL CONTRACTS	BARNES	KELLY	FLACC0052	14-Mar-1972	2
☐	☐	FLACC0052	▼	89915	VL CONTRACTS	BARNES	KELLY	FLACC0052	14-Mar-1972	1
☐	☐	FLACS0002	▼	89862	VL CONTRACTS	BENSON	OLIVIA	FLACS0002	12-Apr-1960	

Your Query will display in the result set list.

HOW TO CREATE A SAVED QUERY

Save Search ⊗

Name* [   ]

☐ Available to all users

[SAVE]   CANCEL

New Search - B-H-EMPL

Search Criteria

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

ID	A00010305
PIDM	
DOCUMENT TYPE	Multiple select / Input and enter
LAST NAME	
FIRST NAME	
SSN	
BIRTH DATE	
POSITION	
POSITION NUMBER	
POSITION SUFFIX	
HIRE DATE	
TERMINATION DATE	
ROUTING STATUS	Multiple select / Input and enter
ACTIVITY DATE	

[RUN]   [SAVE]   CANCEL

Enter search data into the query field. Click on Save at bottom of screen

Enter the name of the save search in the Name field and click Save.

NOTE: You can select Available to all users if you want all persons that have access to the application to see the saved search otherwise do not check the box and only you will see the save search on you PC.

Your Query will display in the result set list.

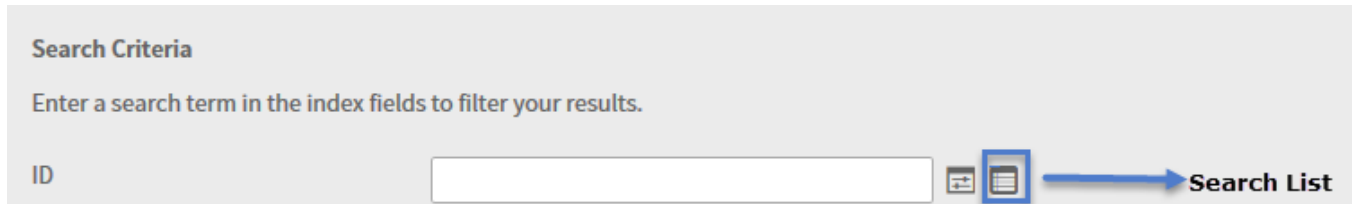You can access the saved search from the application list node

Or from the saved Queries list
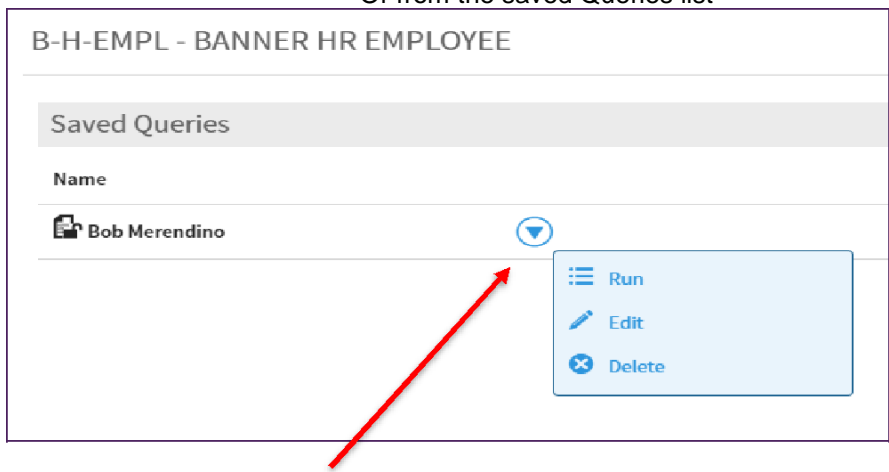
You can run, Edit, or Delete the saved query from the saved query list.

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LIST SEARCH

List Search Criteria - this search criteria allows you to enter multiple select values for a query. As an example, if you wanted to query on 2 or more Bear#'s, you would click on the List search icon and one-by-one, enter the Bear#'s for your query. To use this query, select method, click on the Search List icon next to a search field:
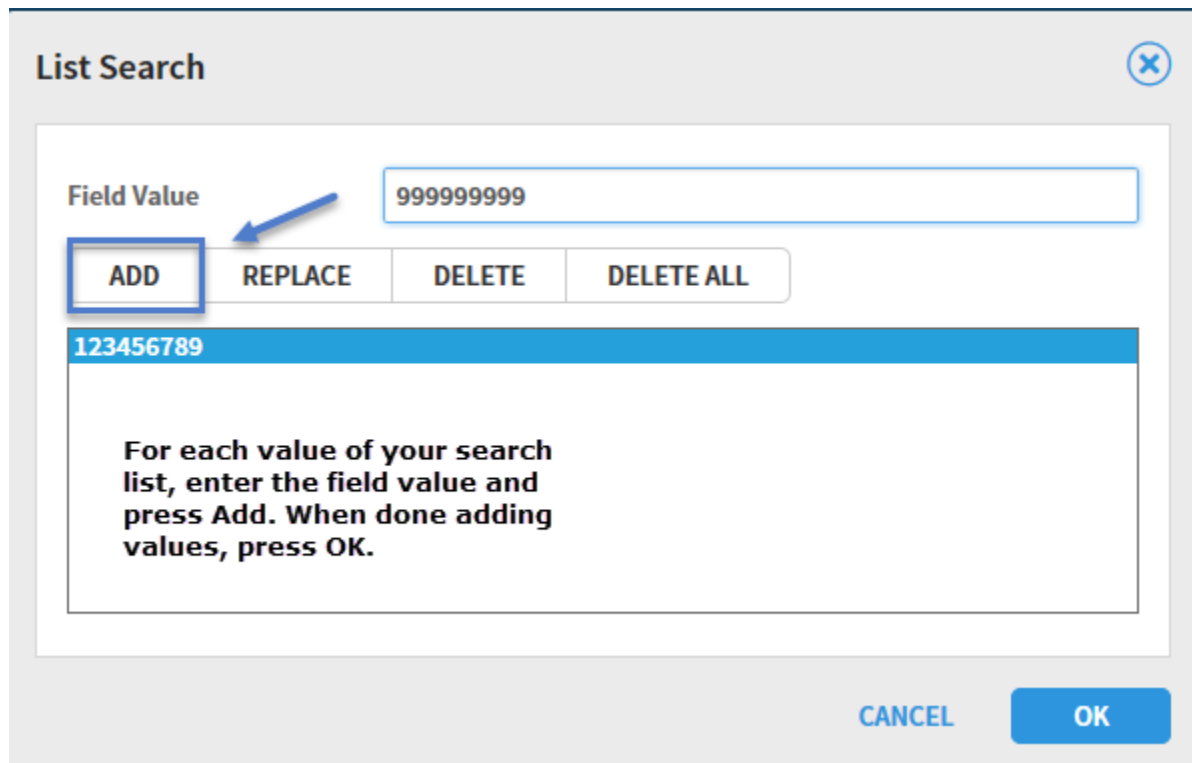
Search Criteria

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

ID ⟶ Search List

As shown below, you can enter multiple field values followed by pressing the ADD button to build your list of search values:

List Search

Field Value   999999999

ADD   REPLACE   DELETE   DELETE ALL

123456789

For each value of your search list, enter the field value and press Add. When done adding values, press OK.
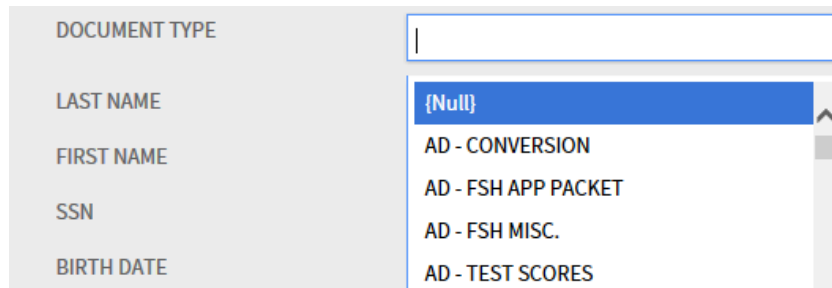
CANCEL   OK

SEARCH FUNCTIONS

BDM Search Criteria Tip: Wildcard character in search fields

In the **New Search** page, index search criteria can be specified by using the asterisk (wildcard) character in at least one field. For example, specify 2018* to search for documents with a term code that begins with the characters "2018."

Multiple select/Input and enter Search Criteria – for search fields that are tied to a predefined list of values (like Document Type,) you can enter values by clicking in the field and entering one or more values.

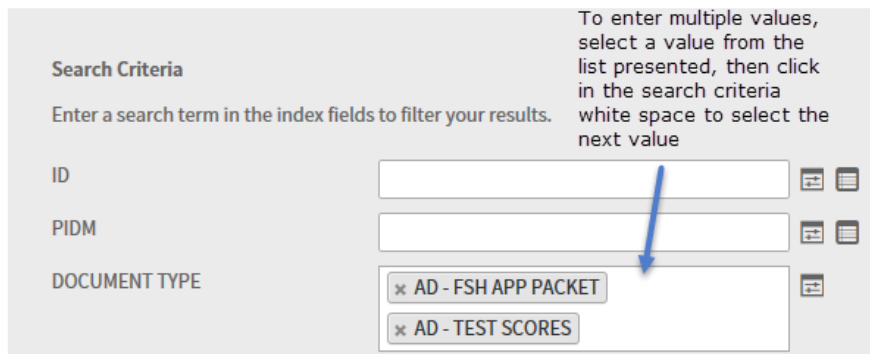| DOCUMENT TYPE	Multiple select / Input and enter	⇄
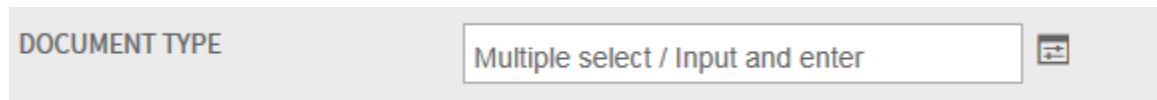
In the example below, clicking in the Document Type field produced a list of values to select from. This search criteria entry method lets you select one or more values from the list of values:

DOCUMENT TYPE	
LAST NAME	**{Null}**
FIRST NAME	AD - CONVERSION
	AD - FSH APP PACKET
SSN	AD - FSH MISC.
BIRTH DATE	AD - TEST SCORES

Once you have finished selecting the multiple select values, the search criteria for that field will show the selected list of values as in the example below.

New Search - B-S-ADMN

Search Criteria

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

To enter multiple values, select a value from the list presented, then click in the search criteria white space to select the next value

ID		
PIDM		
DOCUMENT TYPE	× AD - FSH APP PACKET / × AD - TEST SCORES	

APENDEX

ICON DESCRIPTIONS

SHOW/HIDE THUMBNAILS

ROTATE LEFT/RIGHT

DISPLAY INFORMATION ABOUT PAGE

CREATE ANOTHER DOCUMENT
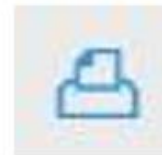
CANCEL INDEXING

ZOOM

FIT WIDTH

Delete Page

Select Scanner

FIT HEIGHT

Delete Batch

Scan

ATTACH CURRENT PAGE

Copy Move

Log out

ATTACH ALL PAGES

Supported file types

Supported files are defined as those file types that BDM can display within the BDM Web Access window. The following file types are supported:

1. Text files (TXT)
2. Image files (JPEG, GIF, TIFF, Windows Bitmap, PCX, DCX, and TGA)
3. Adobe Portable Document Format (PDF) files.
4. Rich Text Format (RTF) files
5. Hypertext Markup Language (HTML) files
6. Extensible Markup Language (XML) files

Unsupported-Foreign file types

Unsupported file types are those that can be imported into BDM but can't be displayed in the BDM Web Access viewer. Example of foreign files include Excel spreadsheet files; MS-Word documents, PowerPoint files and others.

Foreign files stored in BDM can be viewed in one of two ways:

1. Download the foreign file. This option will display the foreign file within the application associated with the file type. For example, an Excel file will display within MS-Excel; Word documents will display in MS-Word and so on.
2. Render the foreign file. This option will attempt to display the contents within your web browser.

When you hover over the thumbnail of a foreign file in the query results screen, the document thumbnail will reveal that the document is a foreign file:

HOT KEYS

Keyboard Shortcuts:

Open shortcut help	`?`
Attach Current Page	`ctrl + alt + t`
Attach All Pages	`ctrl + alt + a`
Next Page	`alt + pagedown`
Previous Page	`alt + pageup`
Rotate Left	`alt + l`
Rotate Right	`alt + r`
Zoom In	`alt + ↑`
Zoom Out	`alt + ↓`

CLOSE

GLOSSARY

Annotation

Note or shape you can add to a document page, typically to focus attention on a particular part of the page.

Application

Index-driven data storage structure where documents can be stored and retrieved. A BDMS application stores related documents pertaining to a specific functional area. Think of an application as a file cabinet.

Batch

A group of electronic files for one or more documents, each of which has one or more pages. Documents can be scanned into batches before they are indexed. This allows for the scanning and indexing functions to be split between different people.

Batch Status

Each batch has a status visible in the Batch List. If the status is set to "Scanning" or "Indexing", it cannot be selected for indexing. Only batches with a status of "Idle" can be selected for indexing.

BDM

Banner Document Management System. SunGard Banner uses the ApplicationXtender suite of applications from EMC as the base for BDMS and provides Banner specific integration points.

Document

An object or group of objects stored in an application and identified by unique sets of index information. Each page of a document is a single object, such as a scanned image file or a word processing file. A document can be as small as one page, or it can contain thousands of pages.

Document Type

A field in the index used to group images. Examples include Transcript, Employment Application, Invoice among many, many others.

Index

Group of fields where information relating to documents is stored. When a document is stored in an application, the index values you enter identify the document. Indexes are similar to what may be on the tab of a folder, such as a person's name or ID number. The main difference is that indexes can contain multiple fields - such as first name, last name, ID and many other things.

Page

A single object. In BDMS, a single page can be a word processing document that contains what would usually be considered multiple pages. Each page of a document shares the document's index values.

Web Access

Also referred to as WebXtender. The web application that provides an interface through which users can store, retrieve, view, and process documents. It doesn't require that anything be installed on a computer. Components can be installed that will provide enhanced functionality.

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