Banner Document Management
Scanning & Indexing in Web Access

April 02, 2019
# Table of Contents

- **LOG INTO BANNER** .................................................. 3
- **SCAN & INDEX A DOCUMENT** .................................. 4
- **SCAN A BATCH** ......................................................... 5
- **INDEX A BATCH** ......................................................... 7
- **WHEN TO USE THE MODIFY BUTTON** ....................... 8
- **IMPORTANT INDEX RULES** ....................................... 9
- **INDEXING BY LAST NAME, FIRST NAME, SSN OR DOB** .... 10
- **COPY OR MOVE A DOCUMENT** .................................... 11
- **QUERY IN WEB ACCESS** ............................................ 13
- **CREATING A RANGE SEARCH** .................................... 14
- **CREATING A SAVED QUERY** ....................................... 15
- **CREATING A LIST SEARCH** ........................................ 17
- **ICON DESCRIPTION** ................................................ 19
- **SUPPORTED FILE TYPES** .......................................... 20
- **HOT KEYS** ............................................................. 21
- **GLOSSARY** ............................................................ 22
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
**SCANNING A BATCH**

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**

<table>
<thead>
<tr>
<th>Batch</th>
<th>Page</th>
<th>Name</th>
<th>Description</th>
<th>Create Time</th>
<th>Created By</th>
<th>Pages</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>B-S-ADMN</td>
<td>1/6</td>
<td>Student record</td>
<td>do first</td>
<td>2018-03-06 15:15:47</td>
<td>SYSSOP</td>
<td>1</td>
<td>Idle</td>
</tr>
<tr>
<td>BATCH 2</td>
<td></td>
<td>2018-03-06 09:41:20</td>
<td>SYSSOP</td>
<td>6</td>
<td>Idle</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BATCH 1</td>
<td></td>
<td>2018-03-06 09:40:08</td>
<td>SYSSOP</td>
<td>19</td>
<td>Idle</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

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.
When Too Use Modify Index

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.
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.
INDEXING BY LAST NAME, FIRST NAME, SSN OR DOB

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

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.

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. Multipaged 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 that needs to be moved to another person, then select Document

**STEP 2**

Select Copy or Move

**STEP 3**

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

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.
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, Greater 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

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

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

Your Query will display in the result set list.
HOW TO CREATE A SAVED QUERY

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.
### Query Results

<table>
<thead>
<tr>
<th>B-H-EMPL</th>
<th>New Search</th>
<th>Query Results</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ID</th>
<th>PIDM</th>
<th>DOCUMENT TYPE</th>
<th>LAST NAME</th>
<th>FIRST NAME</th>
<th>SSN</th>
<th>BIRTH DATE</th>
<th>POSITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>FLAC50002</td>
<td>89982</td>
<td>VL CONTRACTS</td>
<td>BENSON</td>
<td>OLIVIA</td>
<td>FLAC50002</td>
<td>12-Apr-1960</td>
<td></td>
</tr>
<tr>
<td>FLAC50002</td>
<td>89982</td>
<td>VL CONTRACTS</td>
<td>BENSON</td>
<td>OLIVIA</td>
<td>FLAC50002</td>
<td>12-Apr-1960</td>
<td></td>
</tr>
<tr>
<td>FLACCO052</td>
<td>89915</td>
<td>VL CONTRACTS</td>
<td>BARNES</td>
<td>KELLY</td>
<td>FLACCO052</td>
<td>14-Mar-1972</td>
<td>2</td>
</tr>
<tr>
<td>FLACCO052</td>
<td>89915</td>
<td>VL CONTRACTS</td>
<td>BARNES</td>
<td>KELLY</td>
<td>FLACCO052</td>
<td>14-Mar-1972</td>
<td>1</td>
</tr>
</tbody>
</table>

Your Query will display in the result set list.

- **B-H-EMPL**
  - New Query
  - Bob Merendino

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.
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:

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

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

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:

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.
APENDEX

ICON DESCRIPTIONS

SHOW/HIDE THUMBNAILS

ROTATE LEFT/RIGHT

DISPLAY INFORMATION ABOUT PAGE

CREATE ANOTHER DOCUMENT

CANCEL INDEXING

ZOOM

FIT WIDTH

FIT HEIGHT

ATTACH CURRENT PAGE

ATTACH ALL PAGES

Delete Page

Delete Batch

Copy Move

Select Scanner

Scan

Log out
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 + ↓
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.
Confidential Business Information

This documentation is proprietary information of Ellucian and is not to be copied, reproduced, lent or disposed of, nor used for any purpose other than that for which it is specifically provided without the written permission of Ellucian.

Prepared By:
Ellucian Headquarters
4375 Fair Lakes Ct.
Fairfax, VA 22033

© Ellucian. All rights reserved. The unauthorized possession, use, reproduction, distribution, display, or disclosure of this material or the information contained herein is prohibited.

In preparing and providing this publication, Ellucian is not rendering legal, accounting, or other similar professional services. Ellucian makes no claims that an institution’s use of this publication or the software for which it is provided will insure compliance with applicable federal or state laws, rules, or regulations. Each organization should seek legal, accounting, and other similar professional services from competent providers of the organizations own choosing. Ellucian the Ellucian logo, and Banner, Campus Pipeline, Luminis, Power CAMPUS, Pocket Recruiter are trademarks or registered trademarks of Ellucian Inc. or its subsidiaries in the U.S. and other countries. All other trade names are trademarks or registered trademarks of their respective holders.

The configuration described in this document is provided by Ellucian for illustrative purposes only and is not a recommendation by Ellucian that your institution should acquire the equipment reflected herein. Ellucian makes no guarantee or commitment that the equipment described below will be sufficient for your institution’s needs, and the equipment description is merely intended to reflect a starting point for your institution’s consideration. Each software implementation is unique and each institution has different needs and/or requirements. Further, system performance and response times are dependent upon a variety of factors, including network latency, hardware and peripheral configuration, systems tuning, number of users at a given time, peak periods of usage, Internet connectivity, the number of applications being deployed on a processor, as well as hardware sizing and processor capability. Accordingly, the appropriate equipment and configuration for your institution may vary in many regards from the one described in this document. You must independently make the determination as to the equipment to acquire in connection with the implementation of the contemplated software. Ellucian recommends that you consult directly with your hardware vendor of choice regarding overall configuration selection and sizing recommendations. Ellucian has no responsibility or liability in connection with this determination, and Ellucian disclaims any warranties of any kind in connection with the hardware you select, including any warranties of merchantability or fitness for a particular purpose.