



# Banner Document Management Scanning & Indexing in Web Access

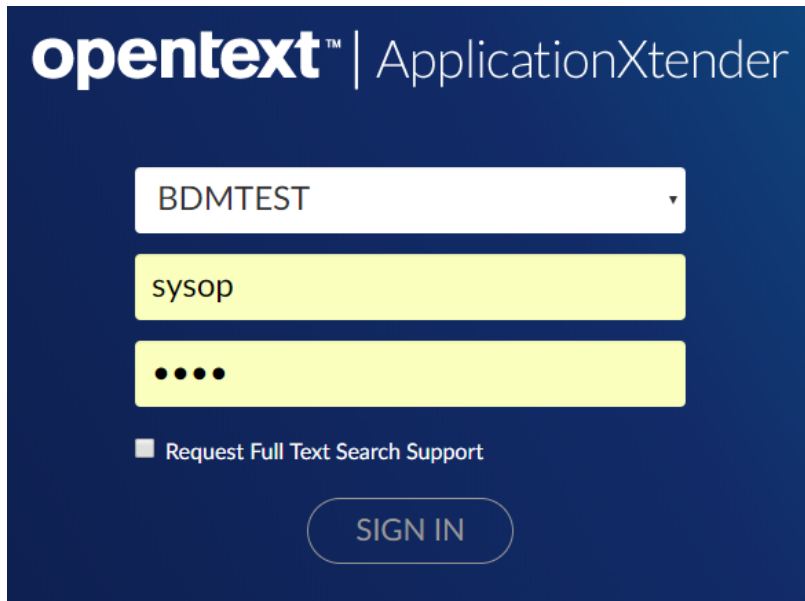
*March 07, 2018*

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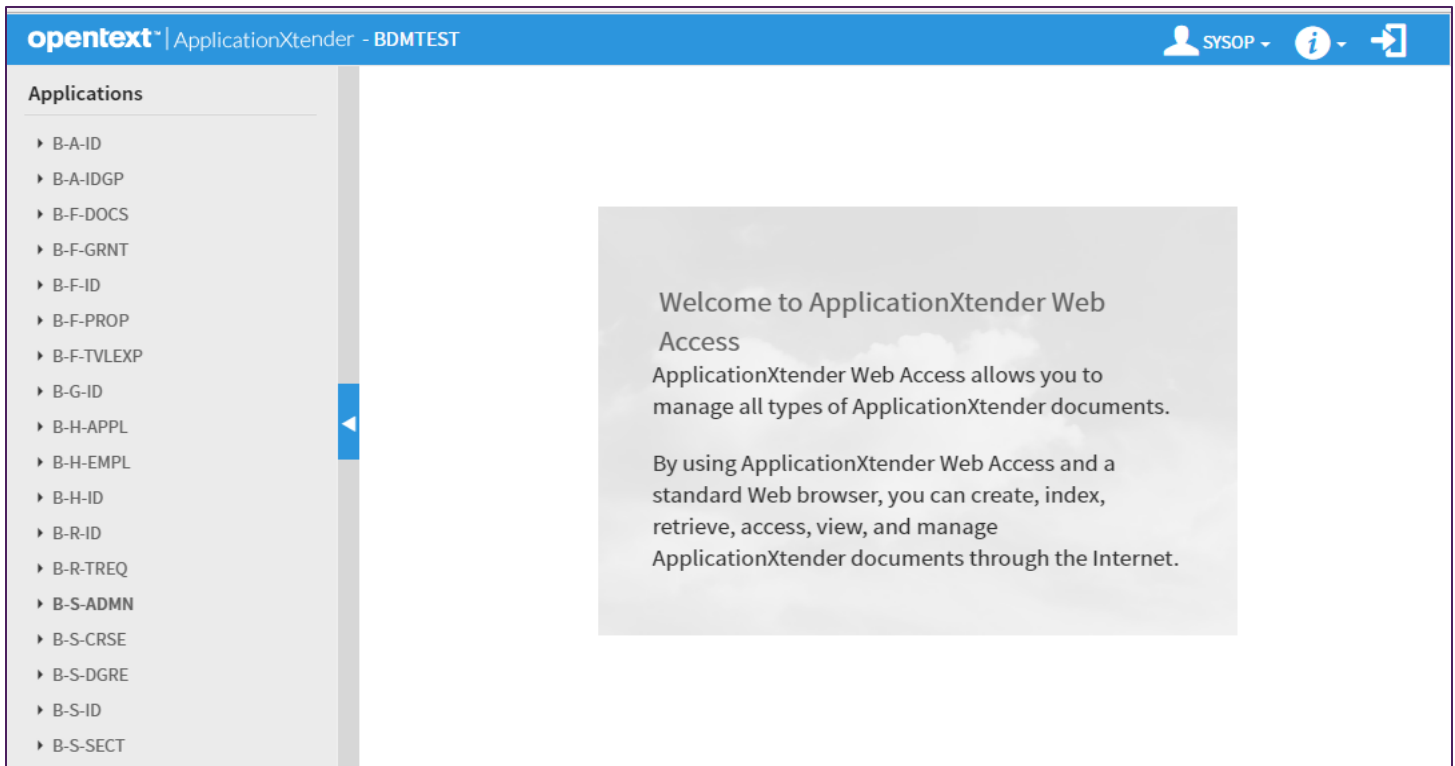
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## Log into Banner Document Management (BDM) Web Access



Enter your name and password



You will see the welcome screen and a list of applications on the left side of screen that you have access too.

## B-S-ADMN - BANNER STUDENT ADMISSIONS



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

The screenshot shows the ApplicationXtender web interface. On the left, there's a scanner toolbar with buttons for Page, Scanner, Rotate, and Zoom. The main area displays a document titled '2012-2013 Direct Student Loan Application and Instructions' from Jefferson. On the right, there's a form for entering document metadata, including fields for ID, PIDM, DOCUMENT TYPE, LAST NAME, FIRST NAME, SSN, BIRTH DATE, TERM CODE, APPLICATION NUMBER, ADMISSIONS REQUIREMENT, INSTITUTION NUMBER, ROUTING STATUS, ACTIVITY DATE, VPOL\_CODE, and DISPOSITION DATE. There are 'CANCEL' and 'SAVE' buttons at the bottom of the form.

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

## SCANNING A BATCH



Select New Batch

Upload New Batch

Application \*

B-S-ADMN

Name \*

STUDENT RECORDS

Description

Do these ASAP

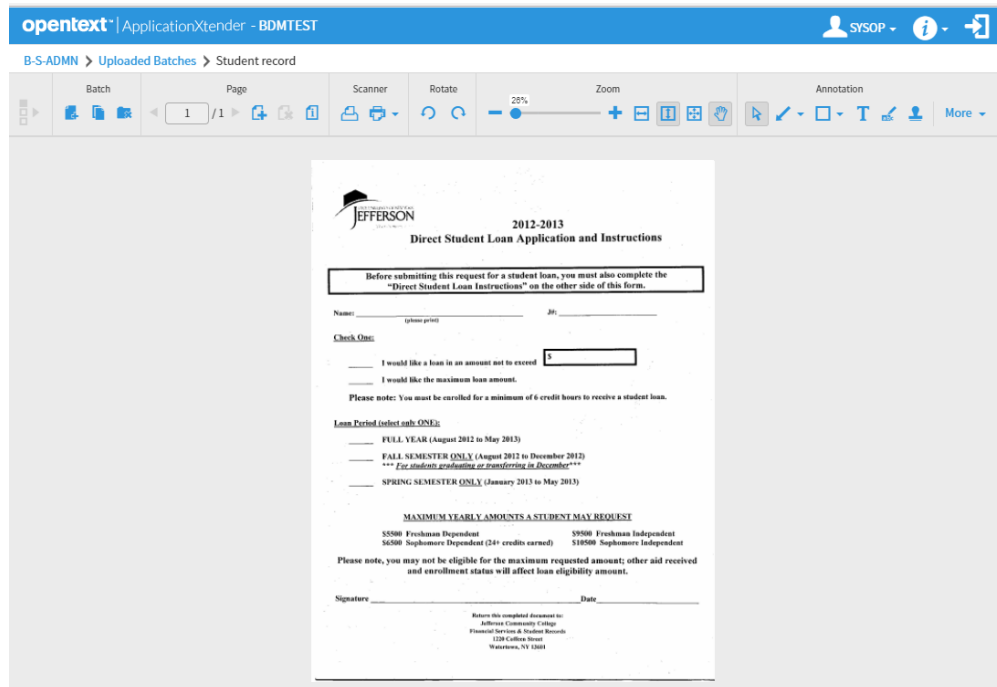
CANCEL

CONTINUE

1. Select the application that you want to scan into.
2. Enter the batch name
3. Optional – Enter a note or description

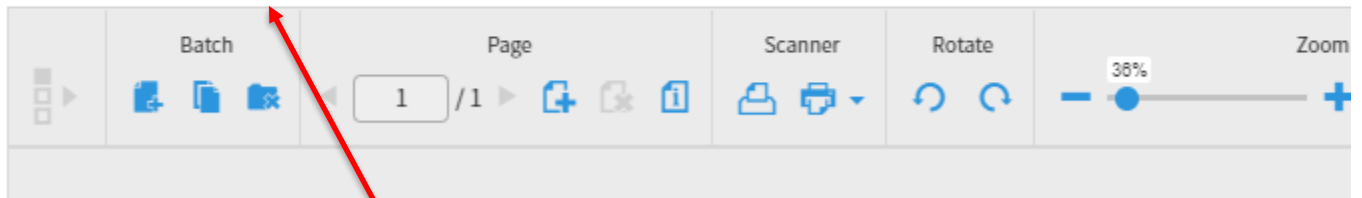


Click on the scan icon



The documents will scan and display in Banner Document Management

B-S-ADMN > Uploaded Batches > Student record



Click on Upload batches to see the batch list

Manage Batches						
B-S-ADMN > Uploaded Batches						
<input type="checkbox"/>	Name	Description	Create Time	Created By	Pages	State
<input type="checkbox"/>	Student record	do first	2018-03-08 15:15:47	SYSOP	1	Idle
<input type="checkbox"/>	BASTCH 2		2018-03-08 09:41:20	SYSOP	6	Idle
<input type="checkbox"/>	BATCH 1		2018-03-08 09:40:08	SYSOP	19	Idle

## INDEXING A BATCH OF DOCUMENTS



Select Manage Batches to index documents

Manage Batches						
B-S-ADMN > Uploaded Batches						
<input type="checkbox"/>	Name	Description	Create Time	Created By	Pages	State
<input type="checkbox"/>	BASTCH 2		2018-03-08 09:41:20	SYSOP	8	Idle
<input type="checkbox"/>	BATCH 1		2018-03-08 09:40:08	SYSOP	19	Idle
<input type="checkbox"/>	TEST DOC		2018-03-08 09:39:12	SYSOP	10	Idle

- Index
- Import
- Edit

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

The screenshot shows the B-S-ADMIN interface. On the left, there's a document preview of a college transcript. On the right, there's a form for entering document details. The form fields are:

- ID \*
- PIDM
- DOCUMENT TYPE \*
- LAST NAME \*
- FIRST NAME
- SSN
- BIRTH DATE
- TERM CODE
- APPLICATION NUMBER
- ADMISSIONS REQUIREMENT
- INSTITUTION NUMBER
- ROUTING STATUS
- ACTIVITY DATE (Timestamp)
- VPDI\_CODE
- DISPOSITION DATE

At the bottom of the form, there are buttons for CANCEL and SAVE.

The document and index screen will appear. Enter the Banner ID into the ID field and the PIDM, LAST NAME, FIRST NAME, SSN, and BIRTH DATE will auto populate.

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.

The screenshot shows the B-S-ADMIN interface with the document details form populated. The fields are:

- 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:

At the bottom of the form, there is a button for MODIFY.

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

**“Modify is for mistakes”**

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

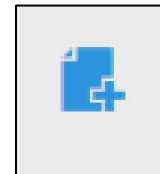
## IMPORTANT INDEXING RULES

### \* 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


ID \*   
 PIDM   
 DOCUMENT TYPE \*   
 LAST NAME \*   
 FIRST NAME   
 SSN   
 BIRTH DATE   
 TERM CODE   
 APPLICATION NUMBER   
 ADMISSIONS REQUIREMENT   
 INSTITUTION NUMBER   
 ROUTING STATUS   
 ACTIVITY DATE   
 VPDI\_CODE   
 DISPOSITION DATE   
 <  >

CANCEL

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.

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

## STEP 2

[illegible]

Document	Page
	Check Out
	Revision History
	Print Document
	Email Document
	Export Document
	Copy or Move Pages
	Delete Document

Select MOVE

## STEP 3

Copy or Move Pages to New Batch

Document Pages

2

☐ Include Page Versions

Target Application

B-H-EMPL

Batch Name

sysop - 11/8/2017 10:50:01 AM

☒ Index New Document

CANCEL

COPY

MOVE

Enter the page that needs to be indexed to another value  
Check the Index New Document box. Click on Move

**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}

The screenshot shows the 'ApplicationXtender Web' interface. The main area displays a document titled 'YALE UNIVERSITY' with a table of activities. The right sidebar contains a form for document details:

- ID: 901234567
- PIDM: [Empty]
- DOCUMENT TYPE: [Empty]
- LAST NAME: MOUSE
- FIRST NAME: MICKEY
- SSN: \*\*\*\*\*1111
- BIRTH DATE: 02-Feb-2020
- TERM CODE: [Empty]
- APPLICATION NUMBER: [Empty]
- ADMISSIONS REQUIREMENT: [Empty]
- INSTITUTION NUMBER: [Empty]
- ROUTING STATUS: [Empty]
- ACTIVITY DATE: [Empty]
- VPDI\_CODE: [Empty]
- DISPOSITION DATE: [Empty]

Buttons for 'CANCEL' and 'SAVE' are at the bottom right of the form.

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

## 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						
<input type="checkbox"/>	Name	Description	Create Time	Created By	Pages	State
<input type="checkbox"/>	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 screenshot shows the ApplicationXtender Web interface. The browser address bar displays the URL: localhost/AppXtender/datasources/BDMTEST/applications/509/batch/3/INDEX. The page title is "opentext® | ApplicationXtender - BDMTEST". The user is logged in as "SYSOP".

The main content area displays a document titled "YALE COLLEGE" and "YALE UNIVERSITY". The document is a historical record of a student's activities and academic performance. It includes sections for "YALE COLLEGE" and "YALE UNIVERSITY", with various fields for personal information, academic records, and extracurricular activities.

On the right side of the interface, there is a form for copying a page. The form includes the following fields:

- ID: 901234567
- PIDM: (empty)
- DOCUMENT TYPE: (empty)
- LAST NAME: MOUSE
- FIRST NAME: MICKEY
- SSN: \*\*\*\*\*1111
- BIRTH DATE: 02-Feb-2020
- TERM CODE: (empty)
- APPLICATION NUMBER: (empty)
- ADMISSIONS REQUIREMENT: (empty)
- INSTITUTION NUMBER: (empty)
- ROUTING STATUS: (empty)
- ACTIVITY DATE: Timestamp
- VPDI\_CODE: (empty)
- DISPOSITION DATE: (empty)

At the bottom of the form, there are two buttons: "CANCEL" and "SAVE".

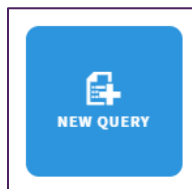
The document will display with the index box. Index the document to the new value and click on SAVE.

## QUERY IN WEB ACCESS

Log into Web Access

Saved Queries	
Name	Created By
ADMISSION APPS	SYSOP

**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

## New Search - B-S-ADMN

### Search Criteria

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

ID	<input type="text"/>	 
PIDM	<input type="text"/>	 
DOCUMENT TYPE	Multiple select / Input and enter	
LAST NAME	<input type="text"/>	 
FIRST NAME	<input type="text"/>	 
SSN	<input type="text"/>	 
BIRTH DATE	<input type="text"/>	  
TERM CODE	Multiple select / Input and enter	
APPLICATION NUMBER	<input type="text"/>	 
ADMISSIONS REQUIREMENT	Multiple select / Input and enter	
INSTITUTION NUMBER	<input type="text"/>	 

RUN

SAVE

CANCEL

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. **A 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

<input type="checkbox"/>	ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE	POSITION	
<input type="checkbox"/> 	FLACC0052		89915	VL CONTRACTS	BARNES	KELLY	FLACC0052	14-Mar-1972	2
<input type="checkbox"/> 	FLACC0052		89915	VL CONTRACTS	BARNES	KELLY	FLACC0052	14-Mar-1972	1
<input type="checkbox"/> 	FLACS0002		89862	VL CONTRACTS	BENSON	OLIVIA	FLACS0002	12-Apr-1960	

Your Query will display in the result set list.

## HOW TO CREATE A SEARCH LIST

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 list icon next to the field that you want to query on.

List Search

Field Value

ADD

REPLACE

DELETE

DELETE ALL

CANCEL

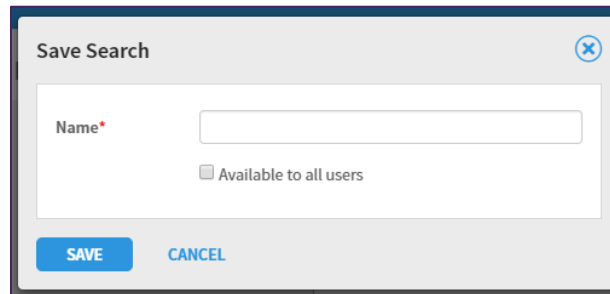
OK

Enter a value in the FIELD VALUE then click ADD. Repeat steps until all your values are display In the box. Then click OK.

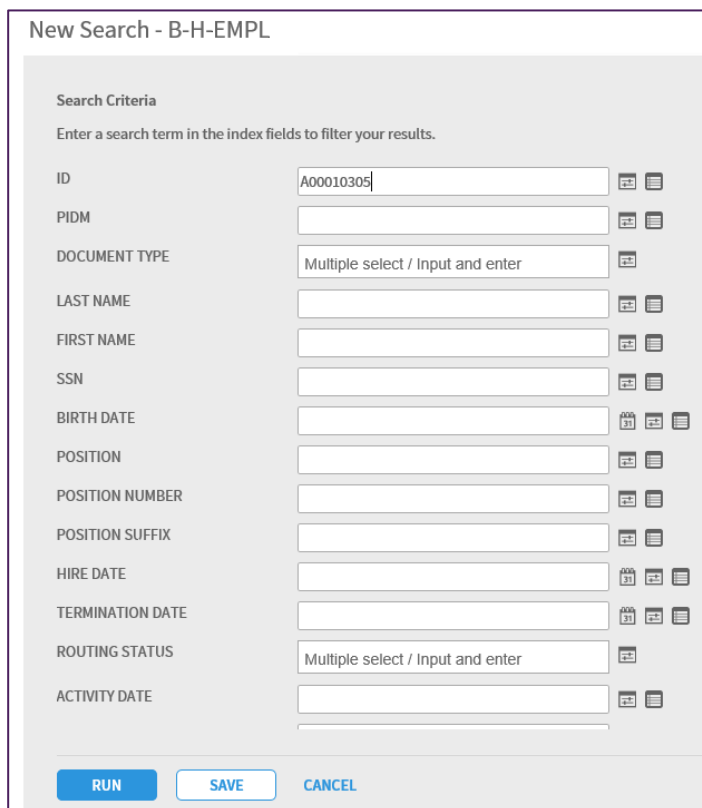
Query Results								
B-H-EMPL > New Search > Query Results								
<input type="checkbox"/>	ID ▾	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE	POSITION
<input type="checkbox"/>	FLACS0002	89862	VL CONTRACTS	BENSON	OLIVIA	FLACS0002	12-Apr-1960	
<input type="checkbox"/>	FLACS0002	89862	VL CONTRACTS	BENSON	OLIVIA	FLACS0002	12-Apr-1960	
<input type="checkbox"/>	FLACC0052	89915	VL CONTRACTS	BARNES	KELLY	FLACC0052	14-Mar-1972	2
<input type="checkbox"/>	FLACC0052	89915	VL CONTRACTS	BARNES	KELLY	FLACC0052	14-Mar-1972	1

Your Query will display in the result set list.

## HOW TO CREATE A SAVED QUERY



The 'Save Search' dialog box is a small window with a title bar containing a close button (X). It has a 'Name' label with a red asterisk next to it, followed by a text input field. Below the input field is a checkbox labeled 'Available to all users'. At the bottom of the dialog are two buttons: 'SAVE' and 'CANCEL'.



The 'New Search - B-H-EMPL' form is a larger window with a title bar. It contains a section titled 'Search Criteria' with the instruction 'Enter a search term in the index fields to filter your results.' Below this are several input fields for different search criteria: ID (with 'A00010305' entered), PIDM, DOCUMENT TYPE (with 'Multiple select / Input and enter' entered), LAST NAME, FIRST NAME, SSN, BIRTH DATE, POSITION, POSITION NUMBER, POSITION SUFFIX, HIRE DATE, TERMINATION DATE, ROUTING STATUS (with 'Multiple select / Input and enter' entered), and ACTIVITY DATE. Each input field has a small icon to its right. At the bottom of the form are three buttons: 'RUN', 'SAVE', and 'CANCEL'.

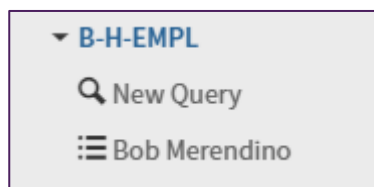
Enter search data into the query field. Click on Save at bottom of screen

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.

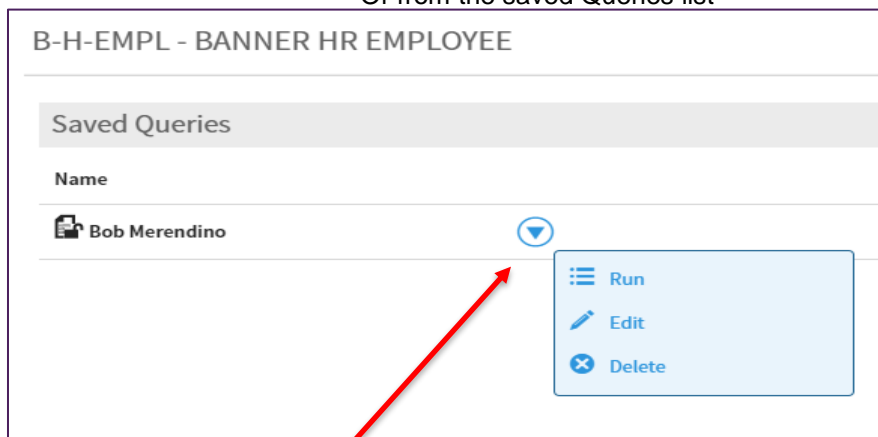
Query Results								
B-H-EMPL > New Search > Query Results								
<input type="checkbox"/>	ID ▾	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE	POSITION
<input type="checkbox"/>	FLACS0002	89862	VL CONTRACTS	BENSON	OLIVIA	FLACS0002	12-Apr-1960	
<input type="checkbox"/>	FLACS0002	89862	VL CONTRACTS	BENSON	OLIVIA	FLACS0002	12-Apr-1960	
<input type="checkbox"/>	FLACC0052	89915	VL CONTRACTS	BARNES	KELLY	FLACC0052	14-Mar-1972	2
<input type="checkbox"/>	FLACC0052	89915	VL CONTRACTS	BARNES	KELLY	FLACC0052	14-Mar-1972	1

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.

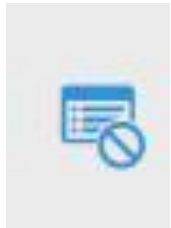
## ICON DESCRIPTIONS



SHOW/HIDE THUMBNAILS



DISPLAY INFORMATION ABOUT PAGE



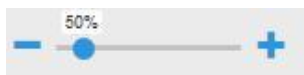
CANCEL INDEXING



ROTATE LEFT/RIGHT



CREATE ANOTHER DOCUMENT



ZOOM



FIT WIDTH



FIT HEIGHT



ATTACH CURRENT PAGE



ATTACH ALL PAGES



Delete Document



Delete Page

|



Delete Batch



Copy Move



Select Scanner



Scan



Log out

## HOT KEYS

Keyboard Shortcuts:

Open shortcut help?

Attach Current Pagectrl + alt + t

Attach All Pagesctrl + alt + a

Next Pagealt + pagedown

Previous Pagealt + pageup

Rotate Leftalt + l

Rotate Rightalt + r

Zoom Inalt + ↑

Zoom Outalt + ↓

CLOSE



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