**Banner Document Management
(BDM)**

Managing Users in BDM

This support guide is for use by the BDM Functional Specialists in the various business offices using Banner Document Management.

The guide provides details and instruction on how to have users added to or removed from BDM through the ITS Service Desk.

Table of Contents

1. Adding Users to BDM

To grant a user access to documents through Web Access (i.e. BDM), that user must be added as a member to a specific BDM User Group or Groups. We have a process for adding users to BDM User Groups that is very similar to adding users to Banner Classes.

All requests to add users to BDM must go through the ITS Service Desk. We have created special Banner Classes that are strictly for BDM purposes. Each Banner Class is associated with a unique BDM User Group. Therefore, in this process, to add a user to BDM you simply have to request the user be added to the proper Banner Class(s)

1.1 Collect and Prepare Information for Submission to ITS Service Desk

When a user requires access to documents that are owned/managed by your office, you will need to collect the following information:
- Banner ID
- User's Full Name
- Banner User Name
- User's Department
- Banner Classes the user will need to be added to (refer to Appendix A)

Notes:
- The collection of this information is only required if the user will be accessing BDM from Banner INB. Users accessing documents through Carleton Central do not fall into this process.
- If the user in question is a new employee or new to using Banner then ensure the user set up in Banner first. BDM access is contingent upon Banner access.

1.2 Submit the Request to ITS Service Desk

Once you have all the necessary information on the user you will submit a request to the ITS Service Desk to have the user added to BDM. The staff of the ITS Service Desk will use the information you provide to add the user to the Banner Class(s) you provide in the request.

- Complete the online request form at: https://i.carleton.ca/computingaccountrequest/
    NOTE – in order to use this form you have to log on with your MC1 credentials. Only authorized requestors can log on to this form. If you are not authorized you will need have someone submit the request on your behalf or get setup as a requestor.
- In the Comments field at the very end of the online form list all the BDM related Banner Classes the user will need to be added to (refer to Appendix A).

Note:
- This online form is the same form used for adding users to Banner. The process of validating and confirming the request will be followed by the ITS Service Desk. The staff of the ITS Service Desk have a list of all BDM related Banner Classes and the appropriate authorizer for each of them.

1.3 The Complete Process

- A user is requires access to documents in BDM.
- The BDM Functional Specialist responsible for the documents and business process in question collects the required information on the user.
- The BDM Functional Specialist completes the online request form and submits the request to the ITS Service Desk.
- The ITS Service Desk will review the request. If the submitter is not a BDM Functional Specialist the ITS Service Desk will seek approval from the BDM Functional Specialist to proceed with the request. At this time, the BDM Functional Specialist may also make changes to the request to make corrections.
- The ITS Service Desk will complete the request and add the user to BDM.
- The BDM Functional Specialist will be notified the request has been completed.
- The BDM Functional Specialist will notify the user and have that user do a full test in BDM to ensure that their access and privileges are accurate.

2. Removing Users From BDM

Users that have access to documents in BDM, but no longer require access, must be removed from any BDM User Groups that provide that access. This removal may be complete, as in the case of an employee that leaves the University, or it may be a partial removal or change to their access, as in the case of an employee that changes roles or positions.
In all cases, the process is very similar to the process for adding users to BDM.

2.1 Collect and Prepare Information for Submission to ITS Service Desk

When a user needs to have document access removed, you will need to collect/prepare the following information:
- Banner ID
- User's Full Name
- Banner User Name
- User's Department
- Banner Classes the user will need to be removed from (use report BANNER_SECURITY_USERS to collect the list of classes)

2.2 Submit the Request to ITS Service Desk

Once you have all the necessary information on the user you will submit a request to the ITS Service Desk to have the user removed from BDM. The staff of the ITS Service Desk will use the information you provide to remove the user from the proper Banner Class(s).

Complete the online request form at: https://i.carleton.ca/computingaccountrequest/
- In the Comments field at the very end of the online form list all the BDM related Banner Classes the user needs to be removed from (use report BANNER_SECURITY_USERS to collect the list of classes).

Notes:
- If this is a case where the user is having their access to BDM changed then in the Comments field, you will list all the BDM related Banner Classes the user must be removed from **and** the classes they now need to be added to.

2.3 The Complete Process

- A user is identified for removal (complete or partial) from BDM or to have their access changed.
- The BDM Functional Specialist responsible for the documents and business process in question collects the required information on the user.
- The BDM Functional Specialist completes the online request form and submits the request to the ITS Service Desk.
- The ITS Service Desk will review the request. If the submitter is not a BDM Functional Specialist the ITS Service Desk will seek approval from the BDM Functional Specialist to proceed with the request. At this time the BDM Functional Specialist may also make changes to the request to make corrections.
- The ITS Service Desk will complete the request and remove/change the user as requested.
- The BDM Functional Specialist will be notified that the request has been completed.
- The BDM Functional Specialist will notify the user and have that user do a full test in BDM to ensure that their access and privileges are accurate.

Appendix A

BDM User Groups & Corresponding Banner Classes for Faculty CI Contracts
BDM User Manager:
- Greg Skazyk (x8484) greg.skazyk@carleton.ca

BDM User Group Name	Related Banner Class Name
FACULTY-CI-ADMIN	CUBDMSGRP_FACULTY-CI-ADMIN

BDM User Groups & Corresponding Banner Classes for Faculty Recruitment & Appointment
BDM User Manager:
- Greg Skazyk (x8484) greg.skazyk@carleton.ca

BDM User Group Name	Related Banner Class Name
FACULTY-RECRT-ADMIN	CUBDMSGRP_FACULTY-RECRT-ADMIN
FACULTY-RECRT-DELETE	CUBDMSGRP_FACULTY-RECRT-DELETE
FACULTY-APPT-ADMIN	CUBDMSGRP_FACULTY-APPT-ADMIN
FACULTY-APPT-DELETE	CUBDMSGRP_FACULTY-APPT-DELETE

BDM User Groups & Corresponding Banner Classes for Faculty Leaves
BDM User Manager:
- Greg Skazyk (x8484) greg.skazyk@carleton.ca

BDM User Group Name	Related Banner Class Name
FACULTY-LEAVE-ADMIN	CUBDMSGRP_FACULTY-LEAVE-ADMIN
FACULTY-LEAVE-CLERK	CUBDMSGRP_FACULTY-LEAVE-CLERK

BDM User Groups & Corresponding Banner Classes for UPASS Opt Out
BDM User Manager:
- Amanda Wright (x8558) amanda.wright@carleton.ca

BDM User Group Name	Related Banner Class Name
UPASS-OPT-OUT-ADMIN	CUBDMSGRP_UPASS-OPT-OUT-ADMIN
UPASS-OPT-OUT-CLERK	CUBDMSGRP_UPASS-OPT-OUT-CLERK

BDM User Groups & Corresponding Banner Classes for Undergrad Admissions
BDM User Manager:
- Megan Richardson (x7046) megan.richardson@carleton.ca
- Jackie Carberry (x8523) jackie.carberry@carleton.ca
- Petr Srna (x8815) petr.srna@carleton.ca

BDM User Group Name	Related Banner Class Name
UG-ADM-ADMIN	CUBDMSGRP_UG-ADM-ADMIN
UG-ADM-OFFICER	CUBDMSGRP_UG-ADM-OFFICER
UG-ADM-OPERATIONS	CUBDMSGRP_UG-ADM-OPERATIONS
UG-ADM-SUPPORT	CUBDMSGRP_UG-ADM-SUPPORT
UG-ADM-DEPT-ECON	CUBDMSGRP_UG-ADM-DEPT-ECON
UG-ADM-DEPT-WOMN	CUBDMSGRP_UG-ADM-DEPT-WOMN
UG-ADM-DEPT-BUSI	CUBDMSGRP_UG-ADM-DEPT-BUSI
UG-ADM-DEPT-FILM	CUBDMSGRP_UG-ADM-DEPT-FILM
UG-ADM-DEPT-COGS	CUBDMSGRP_UG-ADM-DEPT-COGS
UG-ADM-DEPT-LALS	CUBDMSGRP_UG-ADM-DEPT-LALS

BDM User Groups & Corresponding Banner Classes for Registrar's Office
BDM User Manager:
- Amanda Wright (x8558) amanda.wright@carleton.ca
- Anne Young (x2407) anne.young@carleton.ca
- Jeff Wieser (x8672) jeff.wieser@carleton.ca

BDM User Group Name	Related Banner Class Name
RO-ADMIN	CUBDMSGRP_RO-ADMIN
RO-CLERK	CUBDMSGRP_RO-CLERK
RO-REG-SPECIALIST	CUBDMSGRP_RO-REG-SPECIALIST
RO-REG-SPECIAL-CONF	CUBDMSGRP_RO-REG-SPECIAL-CONF
RO-TEAM-LEADS	CUBDMSGRP_RO-TEAM-LEADS
RO-DEPT-CIE	CUBDMSGRP_RO-DEPT-CIE
RO-DEPT-KROE	CUBDMSGRP_RO-DEPT-KROE

BDM User Groups & Corresponding Banner Classes for ISSO
BDM User Manager:
- Cody Wise (x2069) cody.wise@carleton.ca

BDM User Group Name	Related Banner Class Name
ISSO-ADMIN	CUBDMSGRP_ISSO-ADMIN
ISSO-CLERK	CUBDMSGRP_ISSO-CLERK

BDM User Groups & Corresponding Banner Classes for FGPA
BDM User Manager:
- Wayne McGee (x1318) wayne.mcgee@carleton.ca
- Glendy Wong (x2246) glendy.wong@carleton.ca

BDM User Group Name	Related Banner Class Name
FGPA-ADMIN	CUBDMSGRP_FGPA-ADMIN
FGPA-CLERK	CUBDMSGRP_FGPA-CLERK
FGPA-DEPT-ARCH	CUBDMSGRP_FGPA-DEPT-ARCH
FGPA-DEPT-ARTC	CUBDMSGRP_FGPA-DEPT-ARTC
FGPA-DEPT-BIOL	CUBDMSGRP_FGPA-DEPT-BIOL
FGPA-DEPT-BUSI	CUBDMSGRP_FGPA-DEPT-BUSI
FGPA-DEPT-CANS	CUBDMSGRP_FGPA-DEPT-CANS
FGPA-DEPT-CHEM	CUBDMSGRP_FGPA-DEPT-CHEM
FGPA-DEPT-CIVE	CUBDMSGRP_FGPA-DEPT-CIVE
FGPA-DEPT-CLS	CUBDMSGRP_FGPA-DEPT-CLS
FGPA-DEPT-COGS	CUBDMSGRP_FGPA-DEPT-COGS
FGPA-DEPT-COMM	CUBDMSGRP_FGPA-DEPT-COMM
FGPA-DEPT-CSIT	CUBDMSGRP_FGPA-DEPT-CSIT
FGPA-DEPT-COMP	CUBDMSGRP_FGPA-DEPT-COMP
FGPA-DEPT-ECON	CUBDMSGRP_FGPA-DEPT-ECON
FGPA-DEPT-ELEC	CUBDMSGRP_FGPA-DEPT-ELEC
FGPA-DEPT-ENGL	CUBDMSGRP_FGPA-DEPT-ENGL
FGPA-DEPT-EPAF	CUBDMSGRP_FGPA-DEPT-EPAF
FGPA-DEPT-EURR	CUBDMSGRP_FGPA-DEPT-EURR
FGPA-DEPT-FREN	CUBDMSGRP_FGPA-DEPT-FREN
FGPA-DEPT-GEOG	CUBDMSGRP_FGPA-DEPT-GEOG
FGPA-DEPT-GEOL	CUBDMSGRP_FGPA-DEPT-GEOL
FGPA-DEPT-HCI	CUBDMSGRP_FGPA-DEPT-HCI
FGPA-DEPT-HIST	CUBDMSGRP_FGPA-DEPT-HIST
FGPA-DEPT-HLTH	CUBDMSGRP_FGPA-DEPT-HLTH
FGPA-DEPT-HSTP	CUBDMSGRP_FGPA-DEPT-HSTP
FGPA-DEPT-HUMM	CUBDMSGRP_FGPA-DEPT-HUMM
FGPA-DEPT-INAF	CUBDMSGRP_FGPA-DEPT-INAF
FGPA-DEPT-IND	CUBDMSGRP_FGPA-DEPT-IND
FGPA-DEPT-IPIS	CUBDMSGRP_FGPA-DEPT-IPIS
FGPA-DEPT-JOUR	CUBDMSGRP_FGPA-DEPT-JOUR
FGPA-DEPT-KROE	CUBDMSGRP_FGPA-DEPT-KROE
FGPA-DEPT-LALS	CUBDMSGRP_FGPA-DEPT-LALS
FGPA-DEPT-LAWS	CUBDMSGRP_FGPA-DEPT-LAWS
FGPA-DEPT-MAAE	CUBDMSGRP_FGPA-DEPT-MAAE
FGPA-DEPT-MATH	CUBDMSGRP_FGPA-DEPT-MATH
FGPA-DEPT-NEUR	CUBDMSGRP_FGPA-DEPT-NEUR
FGPA-DEPT-NRTH	CUBDMSGRP_FGPA-DEPT-NRTH
FGPA-DEPT-PADM	CUBDMSGRP_FGPA-DEPT-PADM

FGPA-DEPT-PECO	CUBDMSGRP_FGPA-DEPT-PECO
FGPA-DEPT-PHIL	CUBDMSGRP_FGPA-DEPT-PHIL
FGPA-DEPT-PHYS	CUBDMSGRP_FGPA-DEPT-PHYS
FGPA-DEPT-PSCI	CUBDMSGRP_FGPA-DEPT-PSCI
FGPA-DEPT-PSYC	CUBDMSGRP_FGPA-DEPT-PSYC
FGPA-DEPT-SERG	CUBDMSGRP_FGPA-DEPT-SERG
FGPA-DEPT-SOAN	CUBDMSGRP_FGPA-DEPT-SOAN
FGPA-DEPT-SOWK	CUBDMSGRP_FGPA-DEPT-SOWK
FGPA-DEPT-SYST	CUBDMSGRP_FGPA-DEPT-SYST
FGPA-DEPT-WOMN	CUBDMSGRP_FGPA-DEPT-WOMN
FGPA-TAMS-TRANSCRIPT	CUBDMSGRP_FGPA-TAMS-TRANSCRIPT

BDM User Groups & Corresponding Banner Classes for Travel Registry
BDM User Manager:
- Amanda Wright (x8558) amanda.wright@carleton.ca

BDM User Group Name	Related Banner Class Name
TRAVEL-REGISTRY-BGIS	CUBDMSGRP_ TRAVEL-REGISTRY-BGIS
TRAVEL-REGISTRY-DEL	CUBDMSGRP_ TRAVEL-REGISTRY-DEL

BDM User Groups & Corresponding Banner Classes for Student Affairs
BDM User Manager:
- Lisa Ralph lisa.ralph@carleton.ca

BDM User Group Name	Related Banner Class Name
STUD-AFFAIRS-STAFF	CUBDMSGRP_ STUD-AFFAIRS-STAFF
STUD-AFFAIRS-ADMIN	CUBDMSGRP_ STUD-AFFAIRS-ADMIN

BDM User Groups & Corresponding Banner Classes for Human Resources
BDM User Manager:
- Vicky Wiens vicky.wiens@carleton.ca

BDM User Group Name	Related Banner Class Name
HR-ADMIN	CUBDMSGRP_ HR-ADMIN
HR-USER	CUBDMSGRP_ HR-USER
HR-EDITOR	CUBDMSGRP_ HR-EDITOR
HR-CONFIDENTIAL	CUBDMSGRP_ HR-CONFIDENTIAL
HR-MANAGER	CUBDMSGRP_ HR-MANAGER