

**Banner Document Management
(BDM)**

Support Guide for CCS Service Desk

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Overview

Banner Document Management (BDM) is Carleton University's electronic solution for document management. BDM is accessible via Banner through integrated, single sign-on and available in limited integration through Self-Serve Banner (i.e. Carleton Central). BDM is based on a 3rd party application from OpenText called AppXtender which contains a web based user interface referred to as Web Access. Currently in our Carleton implementation of BDM our user community only uses the web interface Web Access.

Web Access is designed on the HTML5 technology and as such is browser agnostic. There is no formal dependency on Windows, Internet Explorer or Active X components as in the past. As such, BDM and its tools are now equally available and featured in both a Windows and MAC environment and via any browser.

To provide a Carleton user the ability to use Web Access, or BDM in general, they must be added to the BDM security matrix. Users that only access BDM through Self-Serve Banner do not have to be added to BDM security.

The remainder of this document illustrates and explains the steps and process flows for both adding & removing users in BDM, and the role the ITS Service Desk plays in that process.

Process Details

BDM Security

BDM contains its own user account, user group and document security configuration. Currently there is no synchronization with MC1 to ensure that user account changes propagate to BDM. Therefore, users must be added to BDM manually to create their accounts and then assigned to user groups.

BDM User Accounts – identified by a username and password as they are in Banner. Each user account is provided with a default user profile upon creation.

BDM User Groups – these are the structures that actually provide access and privilege to users within BDM. Membership in a user group provides a user the ability to carry out tasks in BDM. These are similar to Banner Classes

The metadata for all user accounts and user groups resides in the Oracle database in a series of BDM related schemas.

BDM Functional Specialists

In all functional areas where BDM is being used we have created a network of BDM Functional Specialists to serve as the BDM subject matter experts for those functional areas. In addition, these BDM Functional Specialists have been tasked with handling all requests to the ITS Service Desk for the purpose of managing users in BDM. They will be both the submitter and authorizer. They have been provided detailed documentation and instruction on their role and the process for communicating with the ITS Service Desk.

The BDM Functional Specialists will handle all communications with their respective user communities to inform them of the process and work flow for adding users to BDM. This process should ensure that the ITS Service Desk is only being contacted by these BDM Functional Specialists with user requests.

In addition, the BDM Functional Specialists should be the first point of contact for users in their business areas. Contacts from departments, faculty and office admin staff directly to the ITS Service Desk should be redirected back to the BDM Functional Specialist. In many cases they are able to troubleshoot user problems and triage them before they require a JIRA item be created.

For a complete list of these BDM Functional Specialists, please refer to **Appendix A**

The Format of the Request

BDM Functional Specialists have been instructed to continue to use the current User Account Request form for submitting BDM user requests to the Service Desk (<https://i.carleton.ca/computingaccountrequest/>).

In the request we have been specific that they must provide the following information:

- Banner ID of the user being added to or removed from BDM
- Full Name of the user

- Banner Username of the user
- Banner Class(s) the user is to be added to or removed from
- Use the Comment field to list all Banner Class(s) the user is to be added to or removed from

BDM Related Banner Classes

To facilitate the process of adding or removing users in BDM through the ITS Service Desk we have created a set of Banner Classes that align 1:1 with BDM User Groups. When a user is added to one of these BDM related Banner classes, processes in the background will handle the creation of the BDM user account and assignment to the corresponding BDM user group.

These classes are intended for BDM use only. They should not contain any Banner Forms or Reports. They have all been named with the prefix "CUBDMSGRP". Like any Banner Class, these classes are available through GZASECR for user assignment.

The BDM Functional Specialists are responsible for knowing the details of their respective BDM user groups for their functional area, and what Banner Classes align with them. Therefore, Service Desk staff only have to be able to process the request of adding user to or removing users from Banner Classes. Which the same process that exists for managing users in Banner.

For a complete listing of all Banner Classes and the BDM User Groups they align with refer to **Appendix B**

Adding Users to BDM

Who Submits the Request

All requests for adding users to BDM should come from a BDM Functional Specialist (see appendix A).

Based on the Banner Classes being requested, the request should come from the BDM Functional Specialist that owns those classes (see appendix B).

Any request to add users to BDM that does not come from the BDM Functional Specialist responsible for the Banner Classes in question should be redirected for authorization to the appropriate BDM Functional Specialist.

How is the Request Submitted

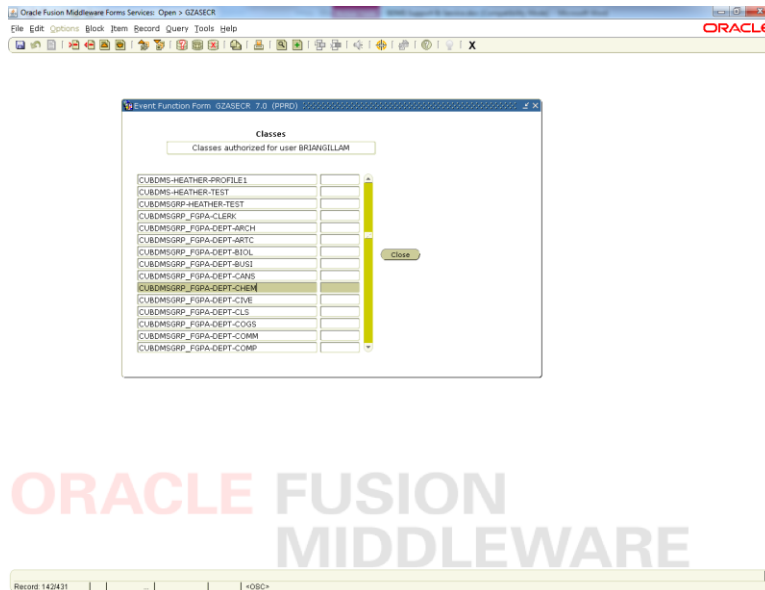
All requests should be submitted through the current User Account Request Form at:
<https://i.carleton.ca/computingaccountrequest/>

The Process

1. A BDM Functional Specialist will submit a request to the ITS Service Desk to have a user added in BDM.
2. The ITS Service Desk will create a ticket for the request.
3. The ITS Service Desk technician will log onto Banner PROD and open GZASECR.
4. In GZASECR enter the users Banner Username, as per the request, in the User ID field.

A screenshot of the "User Administration Form" within the GZASECR application. The form has a title bar "Event Function Form: GZASECR, 7.0 (PROD)". The main content area includes a "User ID:" field with the value "2014N01153M" entered. Below this field is a vertical stack of buttons: "Reset Login", "Unlock Account", "Rename Login", "Classes", "Create/Refresh Login", "Copy Classes", "Edit Account", "Edit Preferred Name", and "Remove Classes". At the bottom of the form, there are several input fields: "Acct Status:" with the value "OPEN", "Locked By:", "Locked On:", "Removal Status:", "Removal Date:", "Darwin User:", and "Developer Role:" with a dropdown arrow.

5. Click on the CLASSES button. The classes list will open.
6. Scroll through the list of classes looking for the class name(s) as supplied by the submitter in the request.
7. Double click the field next to the class name to change the value to YES.



8. Press the CLOSE button to save the changes and close the class list form.
9. Close GZASECR. *Note – at this point the user has been added to BDM*
10. Send confirmation to the BDM Functional Specialist that the request has been completed.

Refer to **Appendix C** for more detail on the process flow for adding users to BDM.

Removing Users from BDM

Who Submits the Request

All requests for removing users from BDM should come from a BDM Functional Specialist (see appendix A).

Based on the Banner Classes being requested, the request should come from the BDM Functional Specialist that owns those classes (see appendix B).

Any request to remove users from BDM that does not come from the BDM Functional Specialist responsible for the Banner Classes in question should be redirected for authorization to the appropriate BDM Functional Specialist.

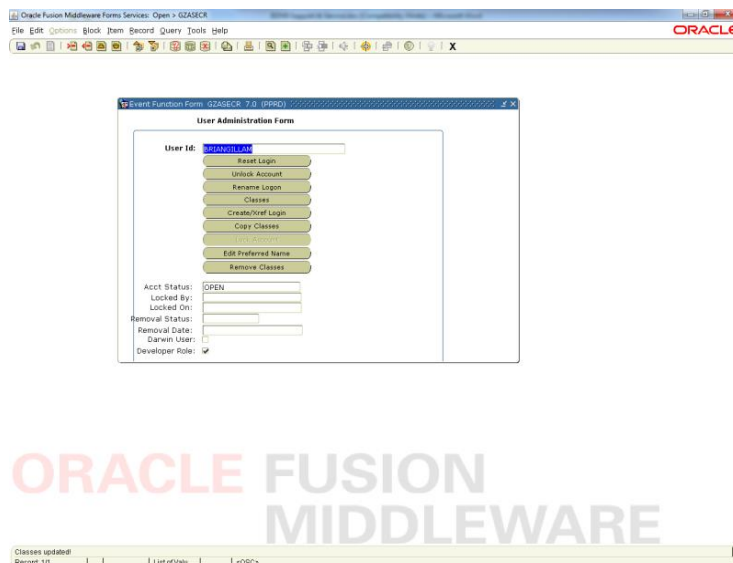
How is the Request Submitted

All requests should be submitted through the current User Account Request Form at:

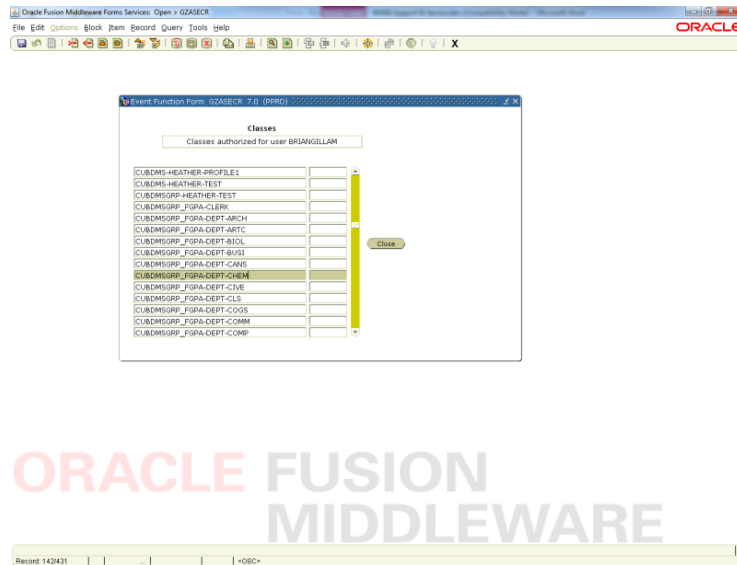
<https://i.carleton.ca/computingaccountrequest/>

The Process

1. A BDM Functional Specialist will submit a request to the ITS Service Desk to have a user removed from BDM.
2. The ITS Service Desk will create a ticket for the request.
3. The ITS Service Desk technician will log onto Banner PROD and open GZASECR.
4. In GZASECR enter the users Banner Username, as per the request, in the User ID field.



5. Click on the CLASSES button. The classes list will open.
6. Scroll through the list of classes looking for the class name(s) as supplied by the submitter in the request.
7. Double click the field next to the class name to change the value to 'BLANK' (i.e. remove the YES).



8. Press the CLOSE button to save the changes and close the class list form.
9. Close GZASECR. *Note – at this point the user has been removed from BDM*
10. Send confirmation to the BDM Functional Specialist that the request has been completed.

Refer to **Appendix C** for more detail on the process flow for removing users from BDM.

Appendix A

BDM Functional Specialist for Faculty (Provosts Office)

Greg Skazyk (x8484) greg.skazyk@carleton.ca

BDM Functional Specialists for FGPA

Wayne McGee (x1318)
Glendy Wong (x2246)
gradsystemsupport@carleton.ca

BDM Functional Specialists for Undergrad Admissions

Megan Richardson (x7046) megan.richardson@carleton.ca
Petr Srna (x8815) petr.srna@carleton.ca

BDM Functional Specialists for Registrar's Office

Amanda Wright (x8558)
Anne Young (x2407)
Jeff Wiser (x8672)
student.systems.support@carleton.ca

BDM Functional Specialists for ISSO

Cody Wise (x2069) cody.wise@carleton.ca

BDM Functional Specialists for Student Affairs

Lisa Ralph lisa.ralph@carleton.ca

BDM Functional Specialists for Human Resources

Vicky Wiens vicky.wiens@carleton.ca

Appendix B**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-MANAGER	CUBDMSGRP_HR-MANAGER
HR-EDITOR	CUBDMSGRP_HR-EDITOR
HR-CONFIDENTIAL	CUBDMSGRP_HR-CONFIDENTIAL
HR-MANAGER	CUBDMSGRP_HR-MANAGER

Appendix C

Process flow for adding and removing users in BDM

