

**Banner Document Management  
(BDM)**

**Getting Started with BDM & Web Access**

Welcome to Banner Document Management (BDM), the Banner integrated enterprise document management solution for student records at Carleton University.

This document serves as a general starting guide for BDM users. In it, you will become acquainted with BDM tools, common terminology and practices to help prepare you to use BDM more confidently and with ease.

This guide is the first in a series of “How To...” guides that have been produced for you, the user, to assist in working with BDM. The remaining guides are titled:

- How to Launch Web Access
- How to Query, View & Print Documents
- How to Import & Index Documents
- How to Delete Batches & Documents
- How to Re-Index Documents
- How to Export Documents
- How to Annotate Documents

Let's get started!!

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## BDM Tools

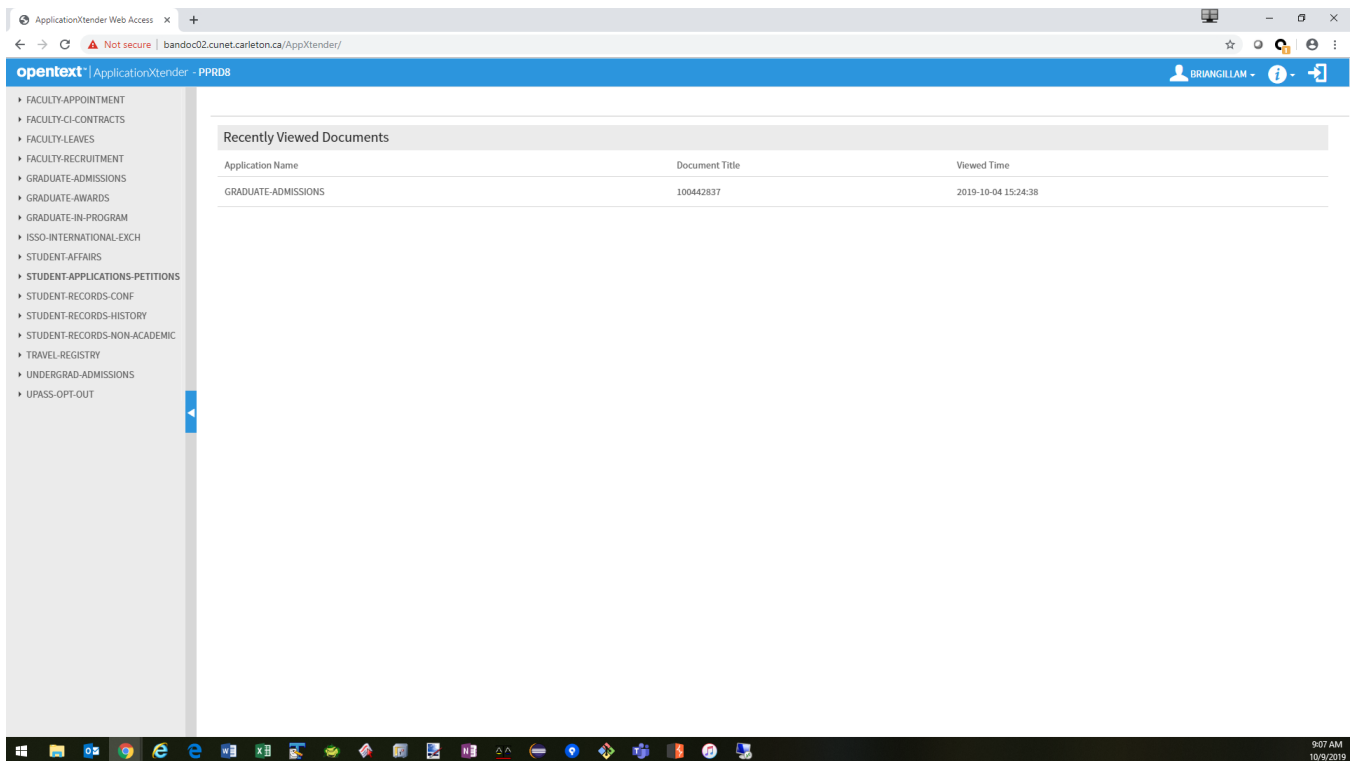
Banner Document Management is a software product that combines a tool set from OpenText and integration features from Ellucian, the vendor that created and supports our Banner Enterprise system. This partnership has allowed us to take advantage of the document management tools from OpenText in a seamlessly integrated manner with our current Banner data and systems.

The primary tool from OpenText is Web Access. Web Access is a web based, browser delivered tool. Making use of this product allows users to have 24x7 access to documents in BDM from any location, inside or outside of Carleton University's network.

Web Access contains a variety of features that provide the ability to perform the various tasks of document management. Not all of these features will be available to all users in Web Access. The features that a user can access are controlled by the user's privileges within BDM.

### 1.1 The Application List View

This view serves as a "home page" within Web Access. This interface is a left/right pane layout and displays a list of all the BDM Applications the user can access in the left pane as well as a list of recently accessed documents in the right pane.



The screenshot displays the ApplicationXtender Web Access interface. The browser address bar shows the URL `bandoc02.cunet.carleton.ca/AppXtender/`. The page title is "opentext | ApplicationXtender - PPRDB". The user is identified as "BRIANGILAM".

The interface is divided into two main panes. The left pane contains a list of application categories, including:

- FACULTY-APPOINTMENT
- FACULTY-CI-CONTRACTS
- FACULTY-LEAVES
- FACULTY-RECRUITMENT
- GRADUATE-ADMISSIONS
- GRADUATE-AWARDS
- GRADUATE-IN-PROGRAM
- ISSO-INTERNATIONAL-EXCH
- STUDENT-AFFAIRS
- STUDENT-APPLICATIONS-PETITIONS
- STUDENT-RECORDS-CONF
- STUDENT-RECORDS-HISTORY
- STUDENT-RECORDS-NON-ACADEMIC
- TRAVEL-REGISTRY
- UNDERGRAD-ADMISSIONS
- UPASS-OPT-OUT

The right pane displays "Recently Viewed Documents" with the following table:

Application Name	Document Title	Viewed Time
GRADUATE-ADMISSIONS	100442837	2019-10-04 15:24:38

The Windows taskbar at the bottom shows the system tray with the date and time: 9:07 AM, 10/9/2019.

## 1.2 The Application View

This view displays in the right hand pane when you select an application from the list in the left hand pane. Details about the application display to the user. If there are saved queries for the application they will list in the view and allow the user to run or edit them. The view will also display recently created documents in the application.

From this view the user can carry out document management actions. A set of buttons is displayed that allows the user to:

- Run a new query to search for documents
- Create a new document and index it in the application
- Create a new batch
- Manage existing batches

The screenshot shows the opentext application interface for the 'GRADUATE-ADMISSIONS' application. The left-hand navigation menu lists various categories such as FACULTY-APPOINTMENT, FACULTY-LEAVES, and GRADUATE-ADMISSIONS. The main content area features four blue buttons: 'NEW QUERY', 'NEW DOCUMENT', 'NEW BATCH', and 'MANAGE BATCHES'. Below these buttons are two tables:

Saved Queries	
Name	Created By
POLITICAL SCIENCE GRADUATE APPLICATIONS	BROOKESFEE
201330 - CIVE - PREFERENCE FORM	DOWILEZITIKYTE
201330 - CIVE - ALL APPLICANTS	DOWILEZITIKYTE
TAMS-TRANSCRIPTS	BRIANGILLAM
ADMISSIONS-FILE	BRIANGILLAM
STUDENT-FILE	BRIANGILLAM

Recently Created Documents		
Document Title	Created Time	Created By
100442837	2019-10-04 15:07:14	BDM Administrator

The bottom of the screenshot shows the Windows taskbar with various application icons and the system clock displaying 9:07 AM on 10/9/2019.

### 1.3 The Query View

This view is accessible from the Application View when the user clicks the New Query button or from various other views by clicking the magnifying glass icon and selecting New Query. The view allows the user to enter query criteria to search for documents within the application.

This view also allows the user to save the query as a saved query for future use.

The screenshot shows a web browser window with the URL `bandoc02.cunet.carleton.ca/AppXtender/`. The page title is "New Search - GRADUATE-ADMISSIONS". On the left is a navigation menu with categories like FACULTY-APPOINTMENT, FACULTY-LEAVES, and GRADUATE-ADMISSIONS. The main content area contains a "Search Criteria" form with the following fields:

- ID: Text input field
- DOCUMENT TYPE: Multiple select / Input and enter
- LAST NAME: Text input field
- FIRST NAME: Text input field
- SSN: Text input field
- BIRTH DATE: Text input field
- DOCUMENT DETAILS: Text input field
- DEPARTMENT: Multiple select / Input and enter
- DOCUMENT STATUS: Multiple select / Input and enter
- TERM: Multiple select / Input and enter
- PROGRAM: Multiple select / Input and enter
- ACTIVITY DATE: Text input field

Below the fields is a checkbox labeled "Include previous document revisions". At the bottom of the form are three buttons: "RUN", "SAVE", and "CANCEL". The Windows taskbar at the bottom shows the time as 9:07 AM on 10/9/2019.

## 1.4 The Query Results View

This view displays the results of a query. From this view the user can perform a variety of document management options:

- Open documents
- Print documents
- Export documents
- Export rolling PDFs
- Customize the query view
- Delete documents

This view will also display floating menus when the user selects a document or multiple documents for action.

As you mouse over the document icon for a specific document row and popup of the document will display allowing users a quick and easy way to locate the document they want to open.

opentext | ApplicationXtender - PPRDB

ApplicationXtender Web Access x

Not secure | bandoc02.cunet.carleton.ca/AppXtender/

BRIANGILLIAM -

Query Results

GRADUATE-ADMISSIONS > New Search > Query Results

Text Search

<input type="checkbox"/>	ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE	DOCUMENT DETAILS	DEPARTMENT	DOCUMENT STATUS	TERM	PROGRAM	ACTIVITY DATE	Pages
<input type="checkbox"/>	100442837	398619	LANG	GILLAM	BRIAN		05-May-1966		0000		201330		2019-10-04 15:07:13	1
<input type="checkbox"/>	100442837	398619	SUPP - CV	GILLAM	BRIAN		05-May-1966		PSYC		201330		2019-09-05 06:18:57	1
<input type="checkbox"/>	100442837	398619	AC TEST - GMAT	GILLAM	BRIAN		05-May-1966		0000		201330		2019-09-05 06:14:08	1

Documents 1 - 3 of 3

◀ Previous | 1 | Next ▶ Items per page: 25

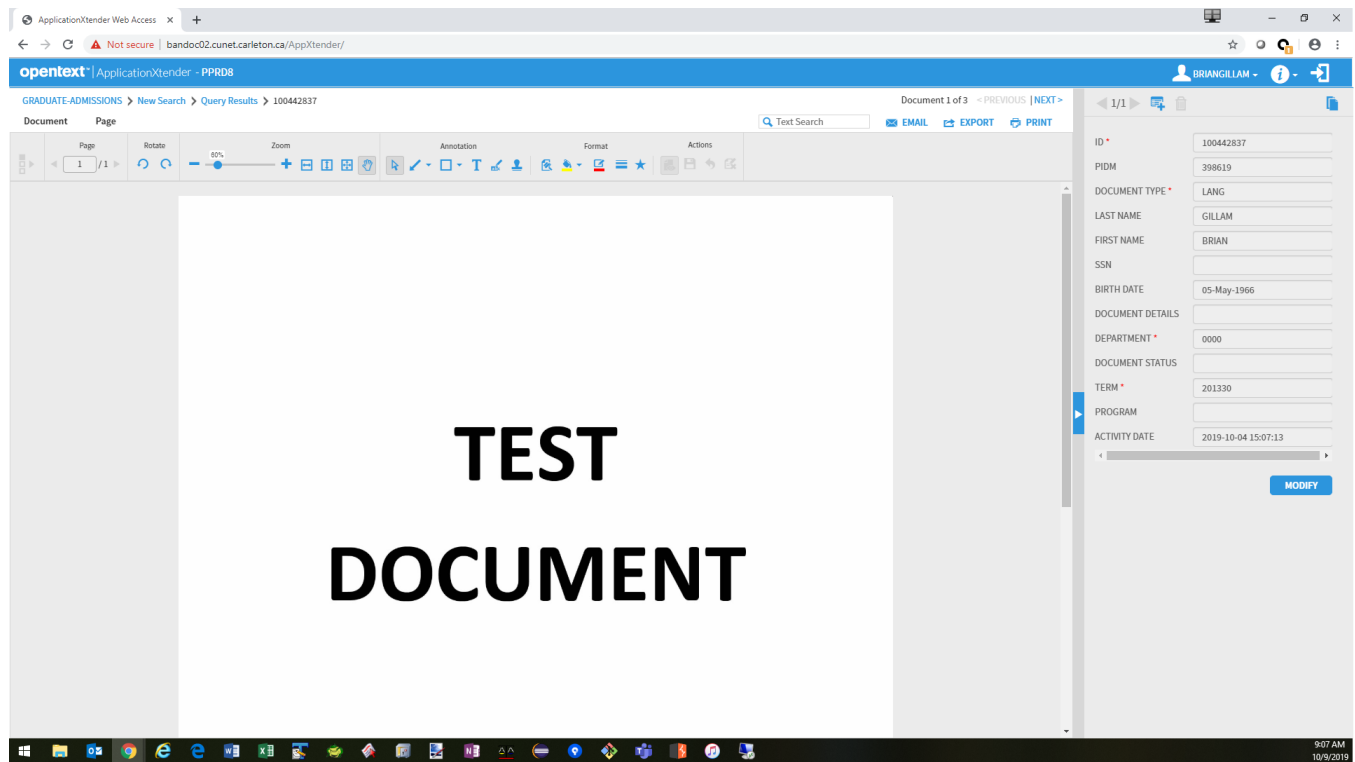
9:07 AM 10/9/2019

## 1.5 Document View

The document view displays an opened document along with its indexing elements. The indexing view is combined with the document view in this new version of Web Access.

This view provides a wealth of document management features. In this view, the user can do the following:

- Rotate the document
- Annotate the document
- Apply redactions
- Export and print the document
- Re-Index the document





## 1.6 Manage Batches View

This interface displays a list of all batches that are in BDM for the selected application.

From this view, a user can select a batch, open it and begin indexing the pages/documents in the batch into the application.

The screenshot shows the 'opentext' web application interface. The main content area is titled 'Manage Batches' and displays a table of 'GRADUATE-ADMISSIONS > Uploaded Batches'. The table has columns for Name, Description, Create Time, Created By, Pages, and State. Each row includes a checkbox for selection and a blue circular icon with a downward arrow. The table lists 25 batches, with the first few rows showing details for various users and creation times. The interface also includes a sidebar with a navigation menu, a top navigation bar with the user's name 'BRIANGILLAM', and a Windows taskbar at the bottom.

Name	Description	Create Time	Created By	Pages	State
<input type="checkbox"/> NULLJANAPATTERSON - 7/30/2019 11:31:31 AM		2019-07-30 11:31:36	JANAPATTERSON	13	Idle
<input type="checkbox"/> NULLMATTHEWBRENNING - 2019-07-29 2:46:34 PM		2019-07-29 14:46:39	MATTHEWBRENNING	2	Idle
<input type="checkbox"/> NULLJANAPATTERSON - 7/29/2019 2:19:00 PM		2019-07-29 14:19:06	JANAPATTERSON	3	Idle
<input type="checkbox"/> NULLJUDITHSRNA - 7/29/2019 9:07:58 AM		2019-07-29 09:08:18	JUDITHSRNA	2	Idle
<input type="checkbox"/> NULLLEEHULL - 7/26/2019 12:16:35 PM		2019-07-26 12:16:41	LEEHULL	1	Idle
<input type="checkbox"/> NULLLEEHULL - 7/26/2019 12:11:15 PM		2019-07-26 12:11:25	LEEHULL	1	Idle
<input type="checkbox"/> NULLLEEHULL - 7/26/2019 12:10:40 PM		2019-07-26 12:10:51	LEEHULL	1	Idle
<input type="checkbox"/> NULLJANAPATTERSON - 7/25/2019 2:25:01 PM		2019-07-25 14:25:09	JANAPATTERSON	2	Idle
<input type="checkbox"/> NULLJANAPATTERSON - 7/25/2019 2:15:57 PM		2019-07-25 14:19:30	JANAPATTERSON	1	Idle
<input type="checkbox"/> NULLJANAPATTERSON - 7/24/2019 1:05:32 PM		2019-07-24 13:05:36	JANAPATTERSON	1	Idle
<input type="checkbox"/> NULLJANAPATTERSON - 7/19/2019 2:26:20 PM		2019-07-19 14:26:26	JANAPATTERSON	5	Idle
<input type="checkbox"/> NULLJANAPATTERSON - 7/19/2019 2:23:54 PM		2019-07-19 14:24:00	JANAPATTERSON	3	Idle
<input type="checkbox"/> NULLJANAPATTERSON - 7/19/2019 2:20:46 PM		2019-07-19 14:20:52	JANAPATTERSON	2	Idle
<input type="checkbox"/> NULLJANAPATTERSON - 7/19/2019 1:19:46 PM		2019-07-19 13:19:52	JANAPATTERSON	6	Idle
<input type="checkbox"/> NULLJUDITHSRNA - 7/18/2019 3:14:07 PM		2019-07-18 15:14:16	JUDITHSRNA	1	Idle
<input type="checkbox"/> NULLWAYNEGEE - 7/18/2019 1:52:56 PM		2019-07-18 13:53:10	WAYNEGEE	2	Idle

Batches 1 - 25 of 323

Items per page: 25

1.7 Menus, Toolbars & Footers

Throughout all the various Web Access views, the user has access to menus, toolbars and actionable footers. In some cases, the menus are pop-ups accessible by clicking another menu item or floating menus that appear when the user performs some action in the view.

The menus, toolbars and footers have mouse over features, when the mouse pointer is held over a particular item a tooltip will display. These tooltips are useful for both locating an item and understanding the purpose of an item.

- Sample menu and toolbar from Query Results View



- In the upper right hand corner of the view is a menu that provides the following:

	Create a new document, Create a new batch, Move to the manage batches view
	Run a new query, Run a multi-app query (cross app query), Run a new report search
	View the last query, View the last query result

- In the greyed out header row a navigation menu exists that allows the user to move backwards within Web Access. In the header row in the sample above you see the following:  
 GRADUATE-ADMISSIONS > New Search > Query Results  
 All the items in this display prior to the last item are clickable and will take the user back to that location in Web Access when clicked. So if the user wants to go back to the Application View they simply click the GRADUATE-ADMISSIONS part of this menu.

In many Web Access views you will see this type of navigation menu across the view’s header.

- At the far right hand end of the greyed out header row you have another menu. This menu provides the following:

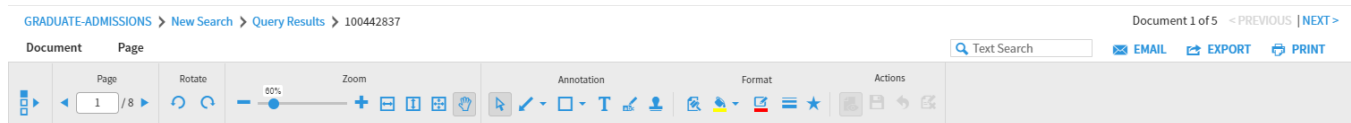
	Perform text searches against the document set being displayed
	Refresh the view
	Customize the view

- Sample Floating Menu from the Query Results View



- When a user checks the checkbox next to a document in the Query Results view this menu appears. The menu provides document features for the user as clearly illustrated in the menu above.

- Document View Menus



- This multi-facet menu offers the user all the features for working with a document as well as navigation
- In the upper left of the menu the user has a navigation menu available to navigate back to parts of the navigation path that got them to this point
- In the upper right of the menu the user has the means to:
  - Text search
  - Email, export or print the document
  - Scroll to other documents in the query results
- The main document menu lets the user:
  - Scroll document pages
  - Rotate the document
  - Annotate and redact
  - Format the document
  - Open thumbnail views of the document pages

## Getting Access to BDM

Web Access is a secured web application requiring user authentication to gain access to documents. The user must have an account in BDM and a password on that account. Due to the integration between Banner and BDM we are able to make use of a user's MC1 credentials in a single sign-on method. The implication of this of course is that any Web Access/BDM user must be a Banner user with MC1 credentials.

To gain access to Web Access/BDM you will need to contact the BDM Functional Specialist that is responsible for the functional area, business process and/or documents that you need to access and work with. The BDM Functional Specialist will collect all the required information they need to submit the request to the ITS Service Desk to have you added to BDM. Once the request is complete, the BDM Functional Specialist will contact you with confirmation.

To see a list of BDM Functional Specialists and their areas of responsibilities visit the BDM Support Web Site at <http://carleton.ca/bdm/training/>

## BDM Terminology

The list below represents important and unique terminology related to BDM. Understanding and using these terms correctly will aid greatly in communicating with other BDM users and CCS.

**Banner Document Management:** Enterprise document management solution integrated with Banner. Banner Document Management is comprised of both the BDM components from Ellucian and AppXtender from OpenText

**BDM:** Acronym for Banner Document Management.

**AppXtender:** The entire document management tool set from OpenText. Includes administrator tools as well as the user tool Web Access.

**Web Access:** Web based tool set for user interaction with documents and BDM.

**Application:** Specific storage locations within BDM. They are displayed on the Application List view.

**Scanning:** The process of turning a paper document to a digitized image.

**Importing:** The process of capturing an electronic file from a PC or network drive into BDM.

**Indexing:** The process of assigning key data values to a document in order to file it within an application and the BDM system.

**Annotating:** The marking up of a document by adding comments. The markup comments are called **Annotations**.

**Redacting:** A special type of annotation that hides information on a document. The annotations that do this hiding are called Redactions.

**Batch:** A temporary storage of scanned or imported document(s) waiting to be indexed into BDM.