Banner Document Management
(BDM)

Getting Started with BDM & WebXtender

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 WebXtender for BDM
> How to Query, View & Print Documents in BDM
> How to Scan, Import & Index Documents in BDM
> How to Delete Batches & Documents in BDM
> How to Re-Index Documents in BDM
> How to Import MS Outlook Email into BDM
> How to Export Documents from BDM
> How to Create PDFs for BDM

Let's get started!!

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1. **BDM Tools**

Banner Document Management is a software product that combines a tool set from EMC Corporation 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 EMC in a seamlessly integrated manner with our current Banner data and systems.

The tool set from EMC is comprised of two primary products...AppXtender and WebXtender. The implementation of BDM at Carleton University makes use of the WebXtender tool set. WebXtender 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.

WebXtender contains a variety of tools or interfaces that provide the ability to perform the various tasks of document management. Not all of these interfaces are available to all users in WebXtender. The interfaces that a user can access will be controlled by the user's privileges within BDM.
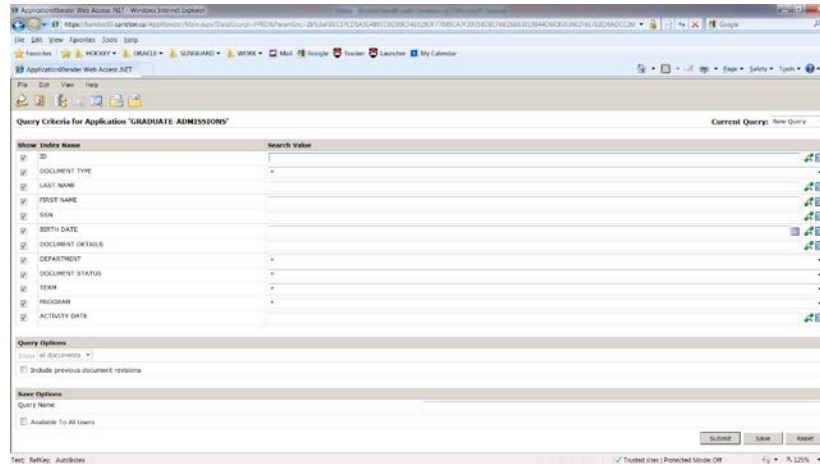
1.1 The Application List Page

Serves as a "home page" within WebXtender. This interface displays a list of all the BDM Applications that the user has access to.
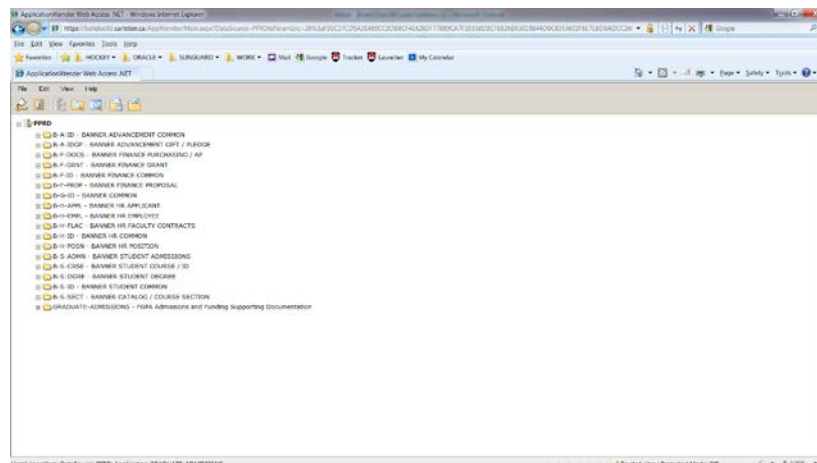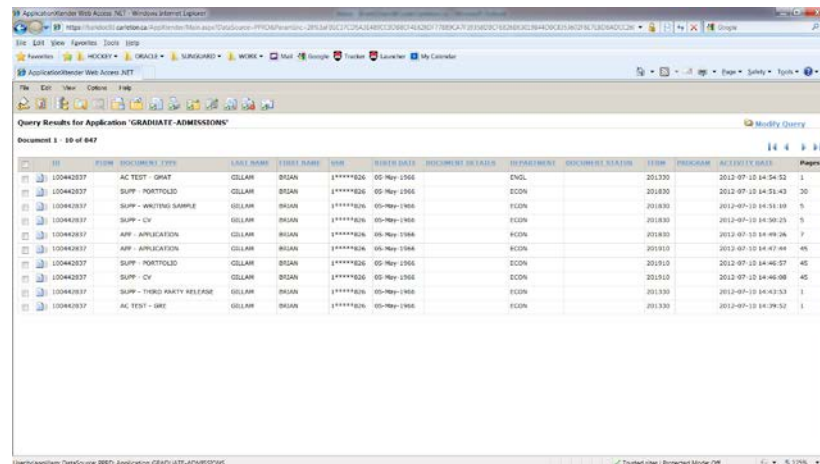
1.2 The Query Page

This interface allows the user to enter query criteria to search within a specific BDM Application, a saved query or a Cross Application Query to locate documents.
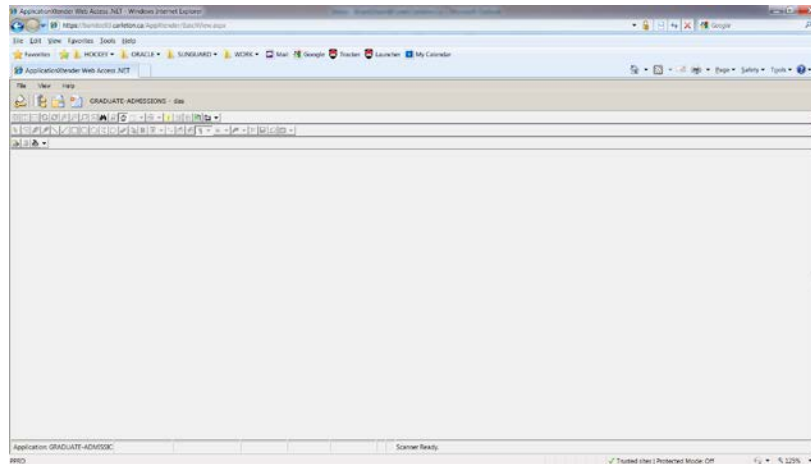

1.3 The Query Results Page

This interface displays the results of a query and allows a user to open the documents listed.

1.4 The Interactive Viewer

This interface is multi-purpose. It serves as the interface for viewing documents when opened from the query results page. It also serves as the interface for importing and scanning documents.
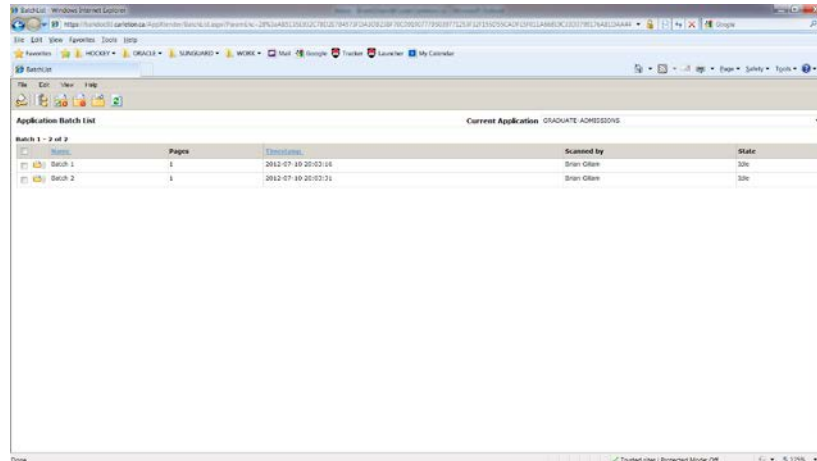

1.5 The Indexing Page

This interface is used for indexing documents in WebXtender. The interface is split into two panes. The left hand pane is called the **Indexing Pane**. The right hand pane is called the **Page View Pane.**
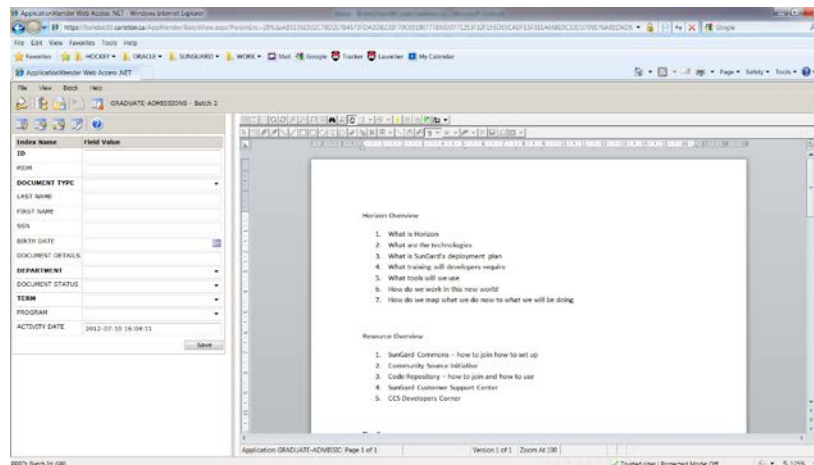
1.6 The Batch List Page

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


1.7 Menus & Toolbars

Throughout all the WebXtender interfaces the user has access to menus and toolbars. In some interfaces (i.e. Interactive Viewer) there are multiple toolbars available, the WebXtender toolbar and the Interactive Viewer toolbars. The menus and toolbars will differ from interface to interface as well as from user to user. Based on the user privileges WebXtender will display the menu and toolbar appropriate.
The toolbars and menus have mouse over features whereby a tooltip is displayed when you hold your mouse pointer over the toolbar button or menu item. These tooltips are useful for both locating an item and understanding the purpose of an item.
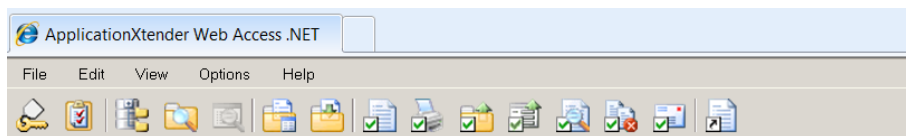
An example of the WebXtender menu and toolbar from the Query Results page
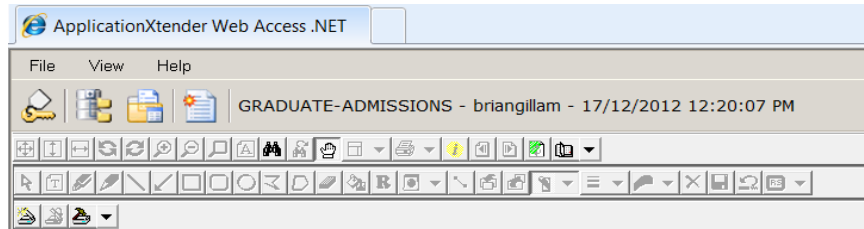
An example of the WebXtender menu and toolbar combined with the Interactive Viewer toolbar in the Interactive Viewer for a user with full admin privileges.
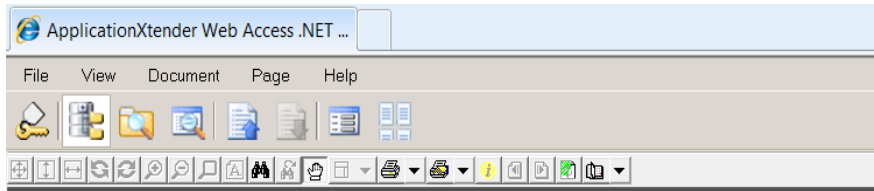
Example of the menus and toolbars from the Interactive Viewer for a user with lesser privileges

2. **Getting Access to BDM**

WebXtender 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. However, due to the integration between Banner and BDM we are able to make use of a user's Banner credentials in a single sign-on method. The implication of this of course is that any WebXtender/BDM user must be a Banner user.

To gain access to 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 CCS 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/

3. 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.

BDM: Acronym for Banner Document Management.

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

Application: The name given to a specific storage location within BDM.   They are displayed on the Application List page.

Toolbar: These are the rows of iconic buttons that are provided for user actions. They differ from menus.

Menus: These are the rows of text items at the very top of the window that are clickable and when clicked expand to display additional options.

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

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

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

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

Redactiing: 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.

Appendix A

We are currenlty using BDM v8.3 and ApplicationXtender 6.5 at Carleton University. The following chart outlines the supported browsers and O/S as indicated by the vendor.

ApplicationXtender Component	Supported
Web Thin Client	IE 7.0 & 8.0 on Windows
	Firefox 3.5 on Windows
	Safari 4 on MAC 10.6
Web Interactive Client	IE 7.0 & 8.0 on Windows

Other browsers or other versions of the listed browsers above are not supported for BDM 8.3 or ApplicationXtender 6.5.   The vendor does not attempt to suggest that other versions will not work simply that support is only offered for those document above.

Notes:
1. These standards only apply to BDM 8.3. As we upgrade to new versions the possibility exists that these may change.
2. The support standards for other Banner related products and Carleton Central may differ from these. These differences may or may not have an impact.
   Ex: Our version of Banner Student is listed as being compatible with FireFox 3.6 but BDM is not.