

**Banner Document Management
(BDM)**

How to Export Documents

Table of Contents

<u>Topics</u>	<u>Page</u>
Overview	3
Exporting Documents	4
<i>1.1 Exporting a Single, One-Off Document</i>	4
<i>1.2 Exporting Multiple Document</i>	6

Overview

Electronic document management systems are designed to act as organized, secured, central repositories for electronic documents, thus reducing or eliminating the need for paper document storage or unsecured, disorganized, electronic document storage. The tools that comprise these document management systems are designed to support this concept and to make working with documents within the system easy and intuitive for users.

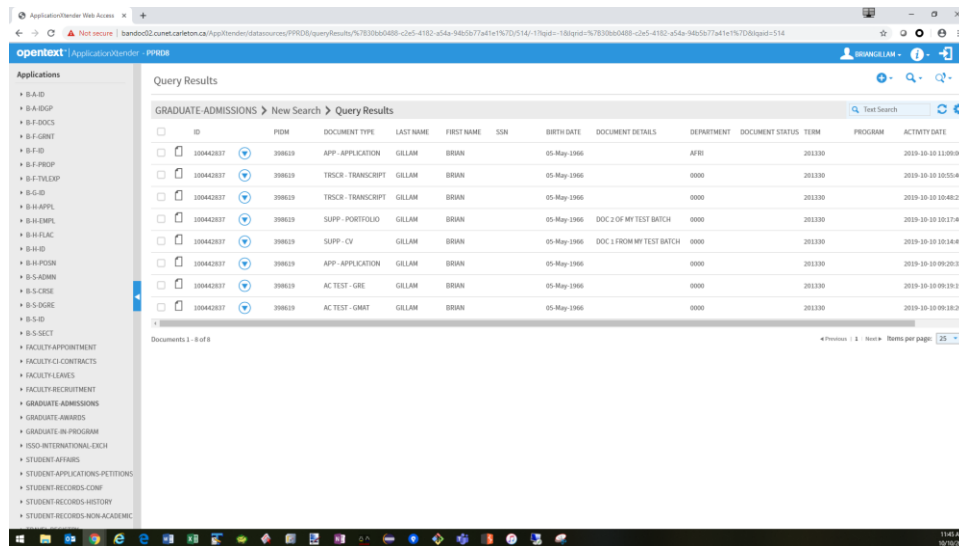
Web Access provides users in BDM the features they require to open, view and work with documents easily and intuitively. Despite this, there is the realization that at times documents may need to be exported out of the system. To allow this, Web Access provides users several options. This document will provide details and instructions on how to export documents in BDM out to a user's PC in electronic format.

Exporting Documents

Web Access provides users several document export features from various views. Documents can be exported as single, one offs or exported in collections (i.e. multiple documents).

1.1 Exporting a Single, One-Off Document

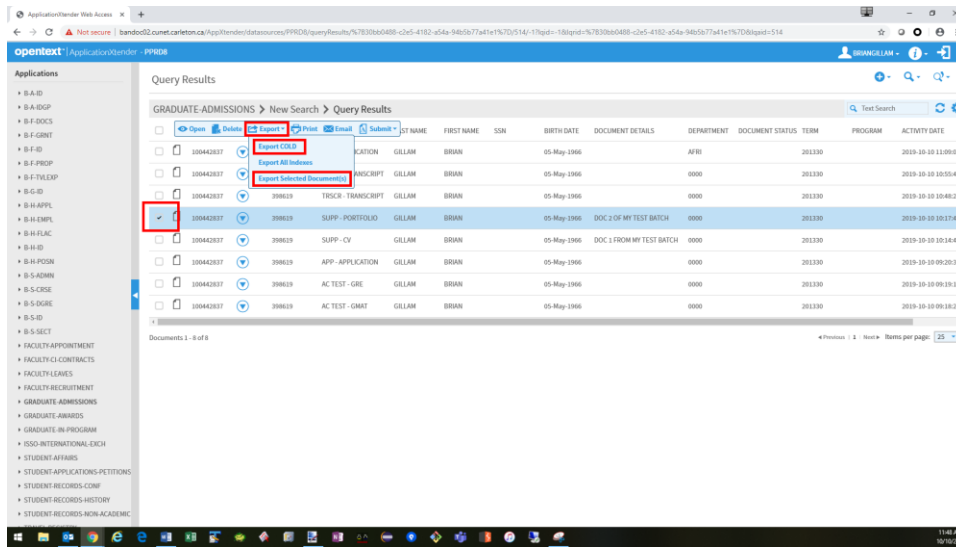
Step 1 – Navigate to the Application List View and select the BDM Application in the left hand pane that you wish to query for documents. In the right hand pane select the New Query button on the Application View. Run a query to generate a Query Results view.



Step 2 – Locate the document you want to export and use one of the following options to complete the export:

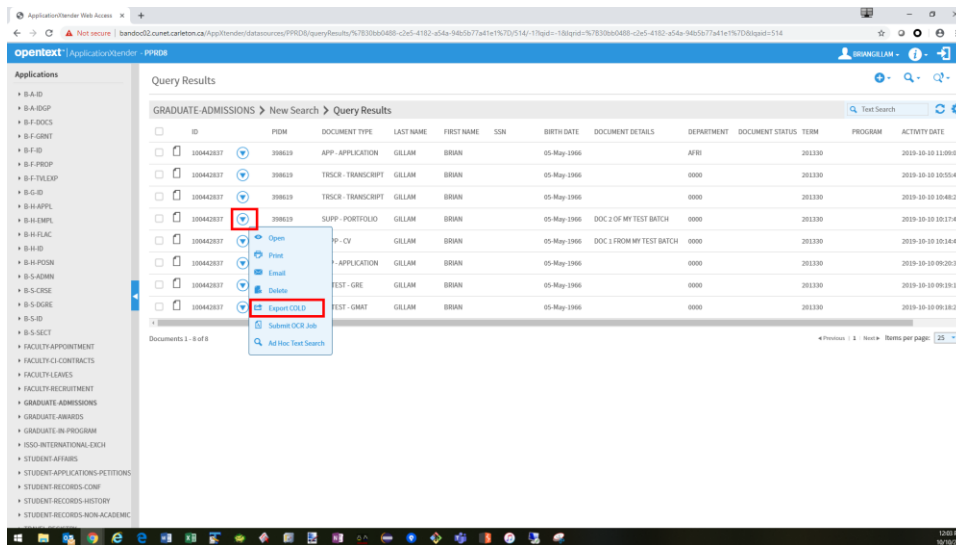
Option #1:

- Check the checkbox on the document row in the Query Results view. In the floating menu, drop down the EXPORT menu option and select Export COLD or Export Selected Document(s).
- If you choose Export Selected Document(s) an Export Document pop-up will appear. Ensure the Document Content(s) radio button is selected and check the Use PDF Format check box. Click the EXPORT button
- A Save As window will appear allowing you to name the exported file and choose a location to save it to.
- If you choose Export COLD Web Access knows to save the export as PDF and you will not be prompted with an Export Document pop-up. A Save As window will open allowing you to name and choose a location for the export.



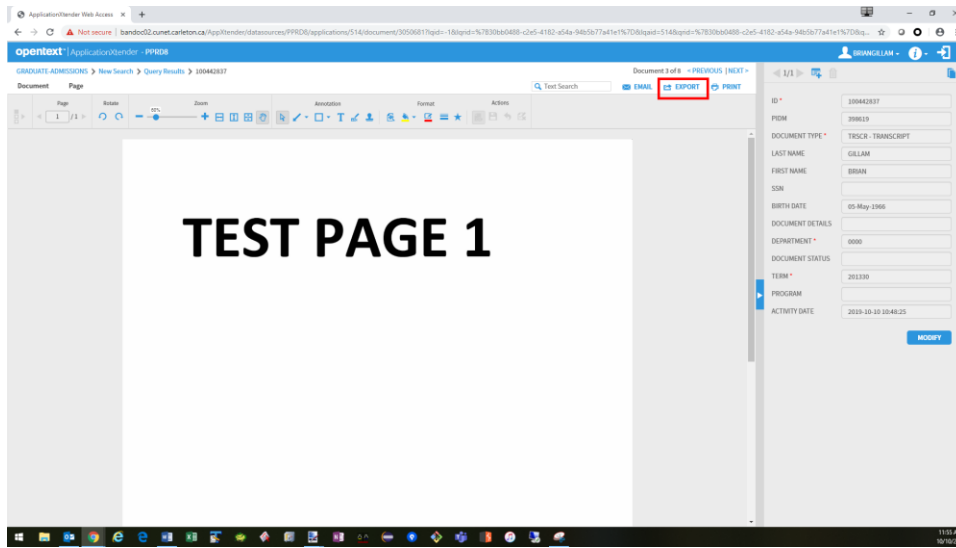
Option #2:

- Click the context menu button on the document row for the document you wish to export
- In the context menu that appears select Export COLD
- When the Save As window opens name the export file and choose a location for the file



Option #3:

- From the Query Results View open the document.
- In the Document view click on the EXPORT button in the view's menu bar.
- An Export Document pop-up will appear.
- Select All Pages and check the Use PDF Format checkbox.
- Click EXPORT and name the file and choose a location in the Save As window that opens

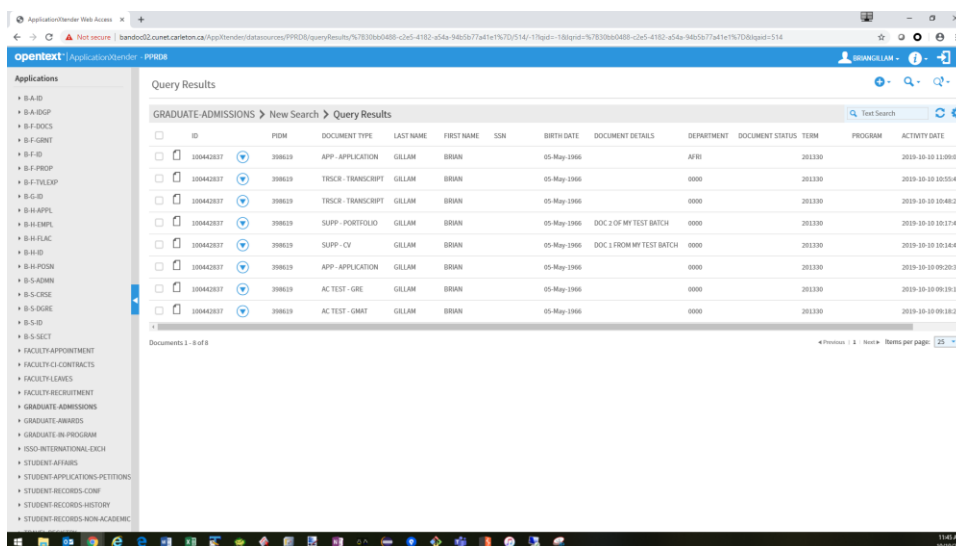


Note:

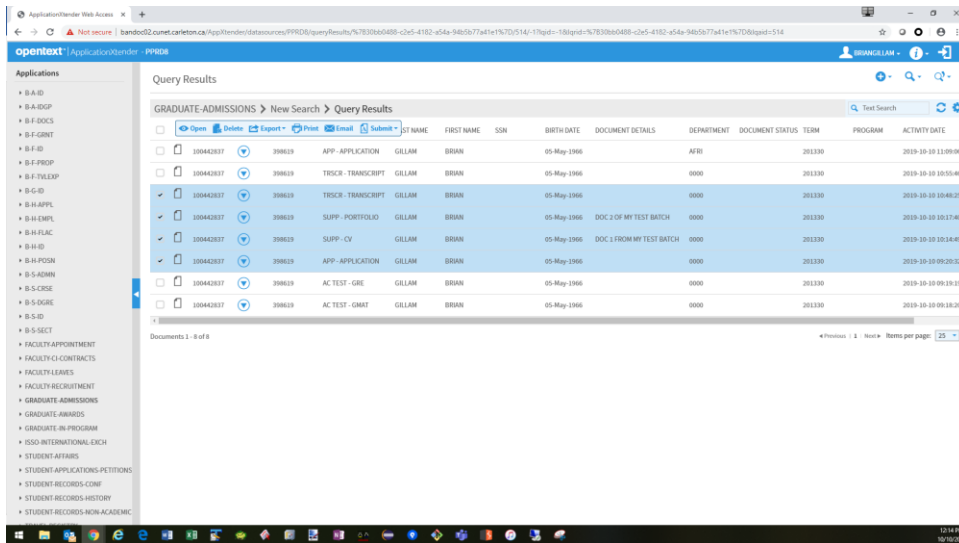
- The PRINT feature can also allow a document to be exported or saved out to the users PC
- When the document opens in a new browser window or tab as a result of a PRINT request the user has a download available as well as the Print to PDF feature in the printing setup

1.2 Exporting Multiple Document

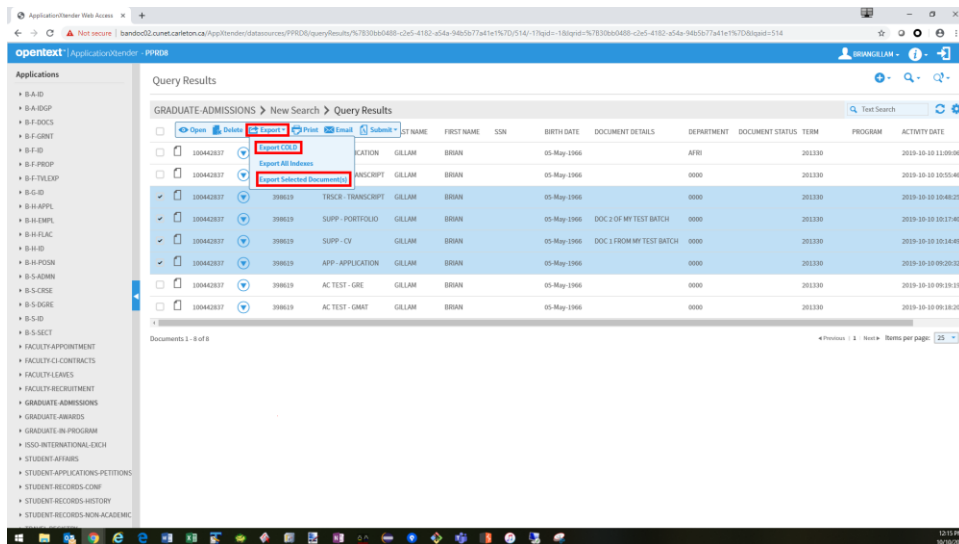
Step 1 – Navigate to the Application List View and select the BDM Application in the left hand pane that you wish to query for documents. In the right hand pane select the New Query button on the Application View. Run a query to generate a Query Results view.



Step 2 – In the Query Results View locate all the documents you want to export and check the checkbox for all the documents.



Step 3 – in the floating menu drop down the EXPORT menu option and select Export COLD or Export Selected Document(s)



Step 4 – if you select Export Selected Document(s) complete the Export Document pop-up window. Select the Document Content(s) option and check the Use PDF Format checkbox. Click EXPORT and save the file to your PC by completing the Save As window as you would for a single document. If you selected Export COLD save the file to you PC by completing the Save As window as you would for a single document.