**Banner Document Management
(BDM)**

How to Export Documents from BDM

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1. **Overview**

Electronic document management systems are designed to act as organized, secured central repositories for electonic documents, thus reducing or eliminating the need for paper document storage or unsecured, disorganized electorinc 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.

WebXtender provides users in BDM the features they require to open, view and work with documents easily and intuitivly. Despite this, there is the realization that at times documents may need to be exported out of the system. To allow this, WebXtender 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 electonic format.

2. **Exporting Documents in Bulk**

Export COLD Document(s)

This feature, available from the WebXtender toolbar on the Query Results page, allows a user to export all the pages of multiple documents into a single file (i.e. PDF) on their PC. This is a powerful feature to allow a user to consolidate a complete document set into a single file.
*Note – this feature will also allow a user to export a single document.*

Notes:
- *Using this feature to export to PDF format will only work if the documents being exported are PDFs*

1. In WebXtender open the Query page for a particular application and run a query or run an exising saved or cross app query.
   Refer to the document **How To Query, View & Print Documents in BDM** for more information on querying documents.

2. On the Query Results page locate the document(s) you wish to export and check the accompanying checkbox for the document.
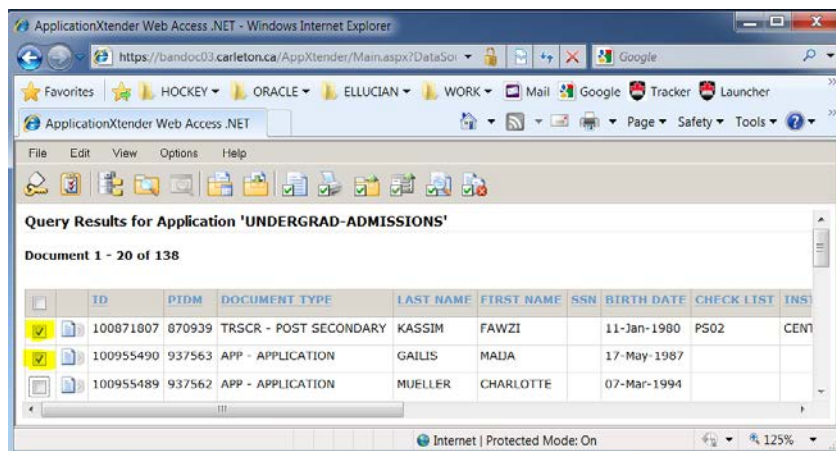
3. On the WebXtender toolbar click the Export Selected OCLD Document(s) button.
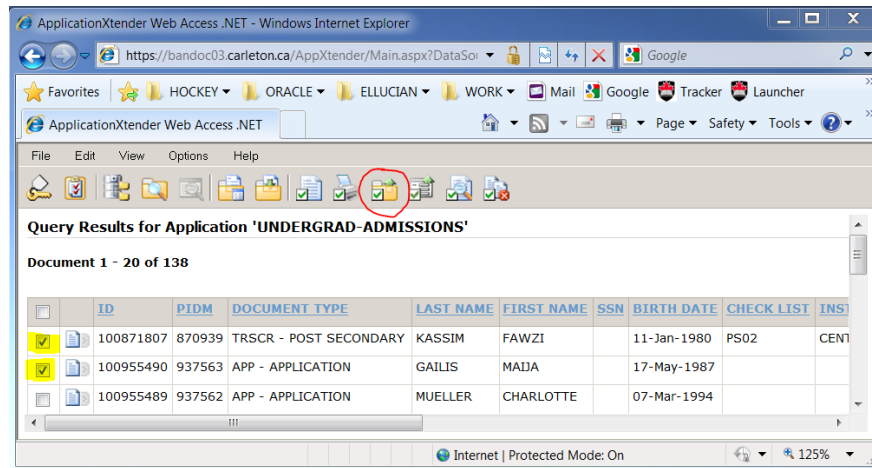
4. A window will appear that will allow you to name the file and select the "Save as Type" for the export. Select "PDF Files (*.pdf)" from the list. Name the file appropriately and in the left hand pane select where the file will be saved.
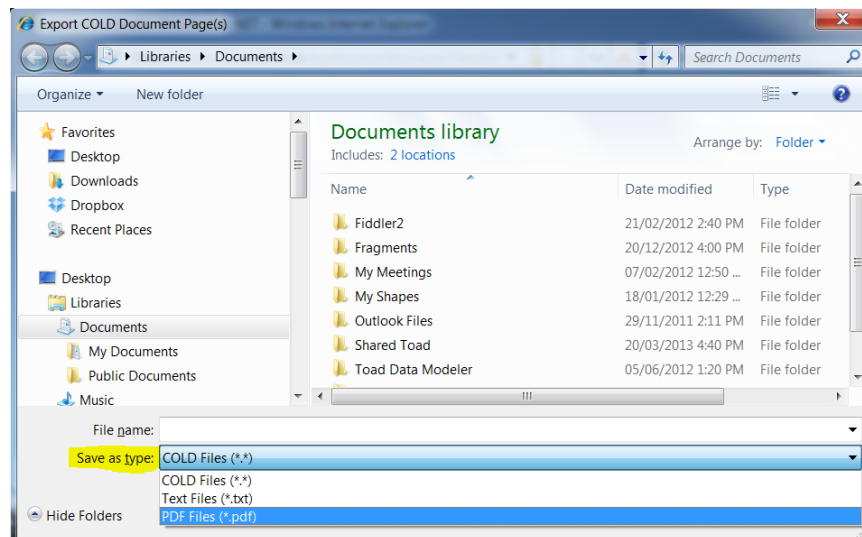
5. Click the SAVE button. The documents you selected will be exported to a PDF file in the indicated location.

    Note – remember only PDF documents can be exported to a PDF file. Using this method with documents of other formats will not be successful.

3. **Exporting Single Documents**

In addition to the feature described above there are several other options for exporting documents from BDM to a user's PC. These options are available from Query Results page and the Document Viewer in WebXtender, meaning the document being exported must be first opened for viewing.
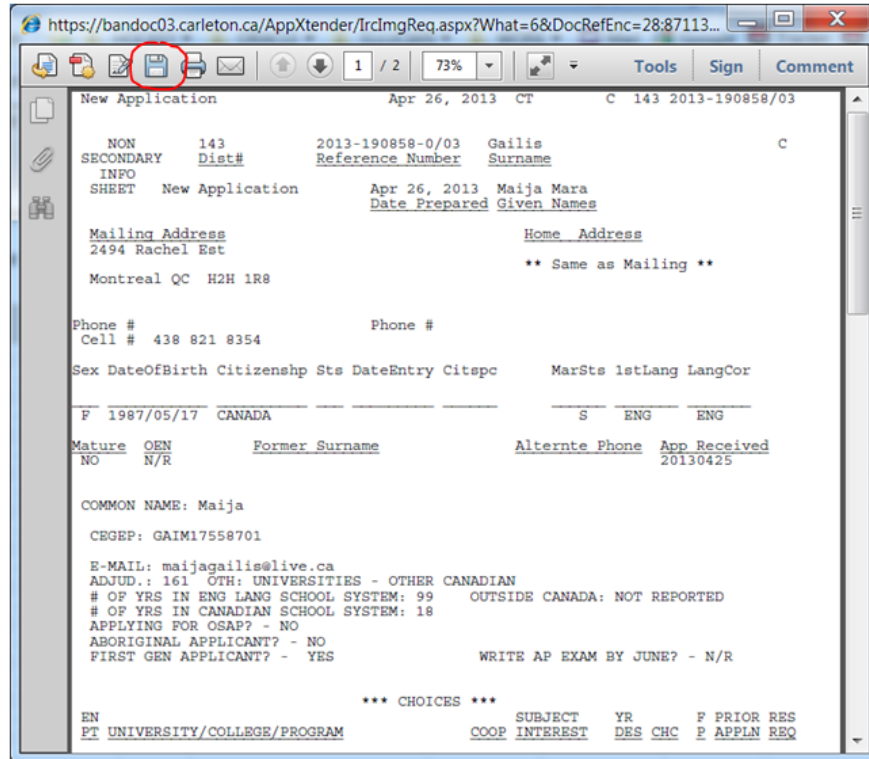
From the Query Results Page

1. On the Query Results page locate the document you would like to export and right click on that document row to view the WebXtender pop-up menu
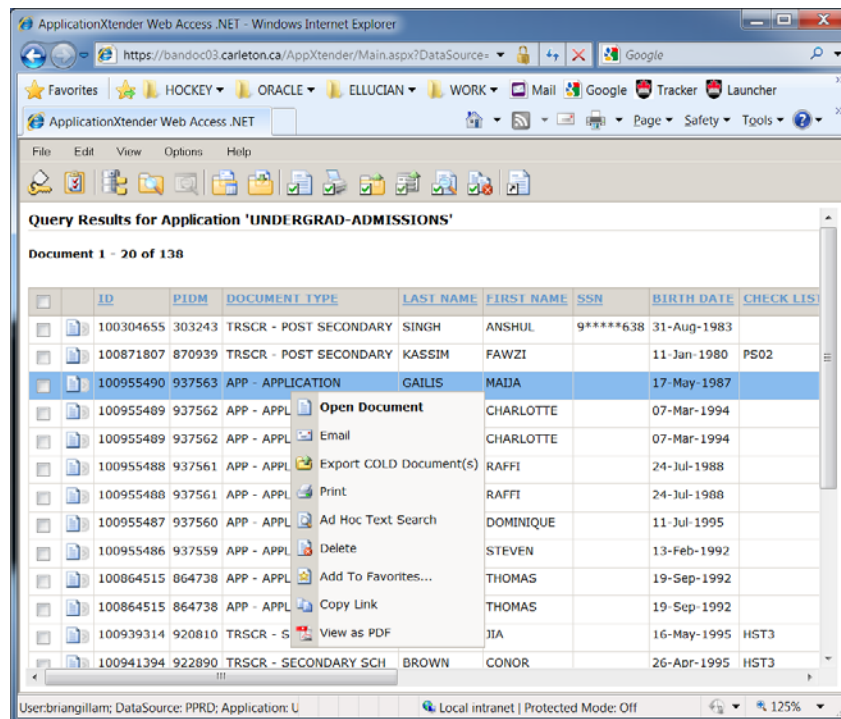
2. Select "View as PDf" from the pop-up menu. The document will open in Adobe Reader. From the Adobe Reader toolbar click the SAVE button and save the document with all its pages to a file on your PC.
    Note – the document must be in PDF format for this featre to succeed


<u>From the Document Viewer</u>

To access these features you must open the document for viewing from the Query Results page. From the document viewer there are several different ways to export a document to the user's PC.

Merge PDF for Print:

1. On the Query Results page locate the document you wish to export and double click the document row to open it in the document viewer.

2. With the document now displayed in the viewer select Document -> Merge PDF for Print from the WebXtender menu
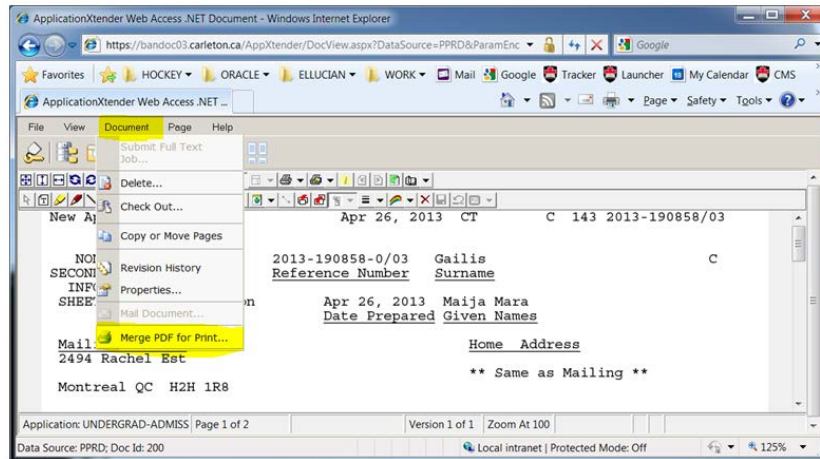
3. The document will open in Adobe Reader if it is a PDF document. The user will now have the ability through Adobe Reader to save the document to their PC.

Export:

1. On the Query Results page locate the document you wish to export and double click the document row to open it in the document viewer.

2. With the document now displayed in the document viewer click on the drop down arrow next to the "Print Document/PDF Print…" button in the document viewer toolbar. Select "Export" from the drop down menu that appears.
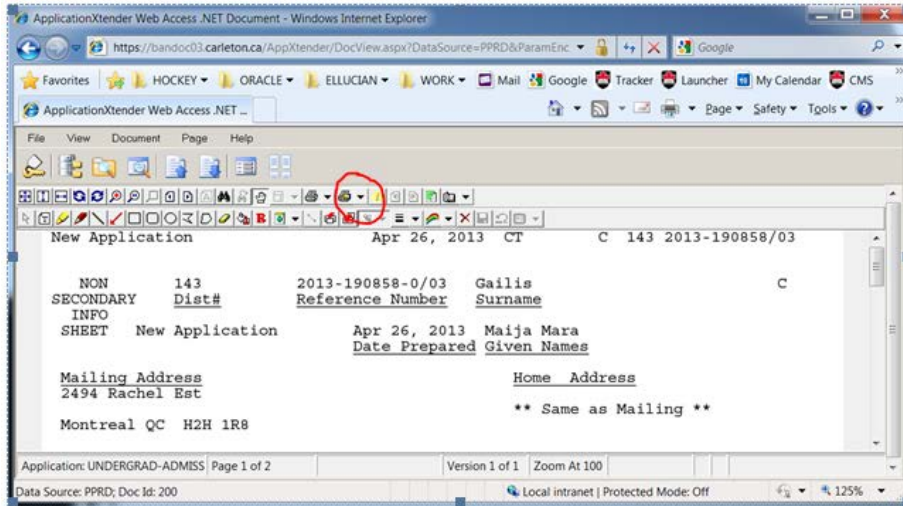
3. You will be presented with an Export dialog window that will allow you to name the export file and from the left hand pane select where you want the file saved to. You can not indicate the "Save as Type" for the export. It is contolled by BDM configurations.
    Note – we have our current implemtation of BDM configured to prefer PDF as the format for exporting. Otherwsie the export will save as the same format as the document being exported.