

**Banner Document Management  
(BDM)**

**How to Import & Index Documents**

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## Importing Documents

Importing is the process of bringing electronic document files from storage locations on the user's PC or a network share into Web Access for indexing. Only users that have been granted the appropriate privilege can perform this process.

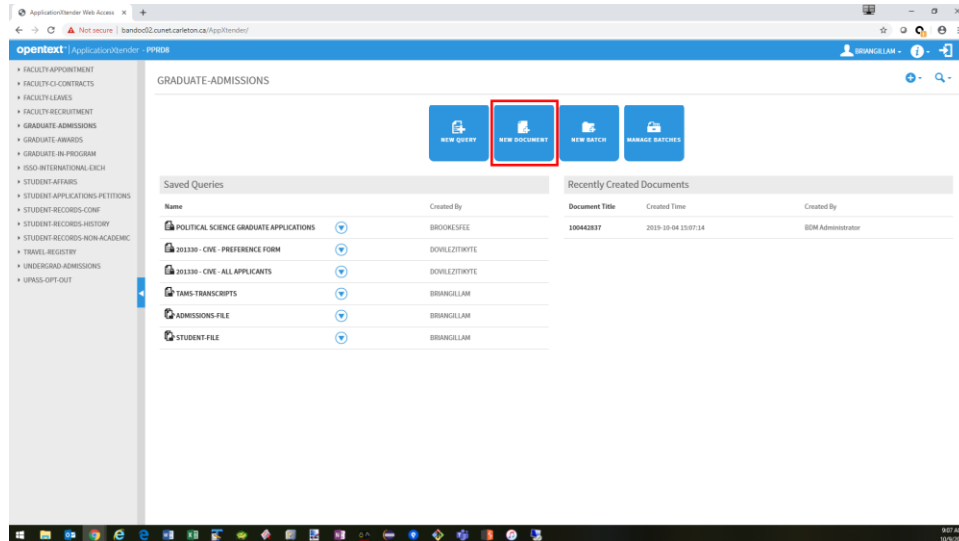
Note:

- Importing is a good method for dealing with documents emailed as attachments that need to be indexed
- Importing can be used to handle electronic documents that arrive as feeds, downloads or as a result of internal processes that dump data from Banner into electronic files
- You can import multiple documents into a batch but the indexing has to be done one document at a time.

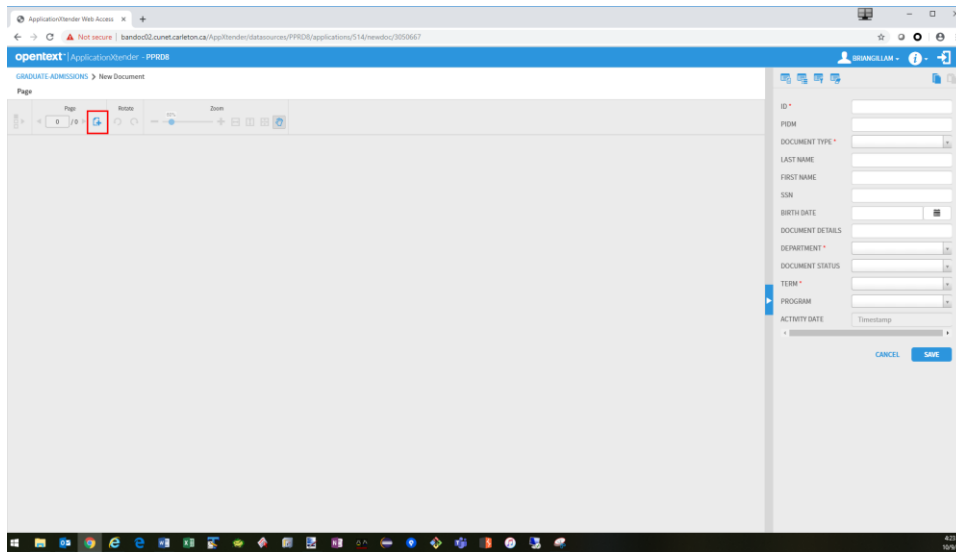
### 1.1 Importing a Single/New Document

This method is favored when importing a *single document* where all the pages belong together and will be indexed as a single document type. Using this method Web Access will treat all the pages as belonging to the document. This is also the favored method when documents are being indexed as immediate one-offs.

Step 1 – Navigate to the Application List View and select the BDM Application in the left hand pane that you wish to import the document into. In the right hand pane select the New Document button on the Application View



Step 2 – in the New Document View click the ADD PAGE button. Search the PC or network share for the document. Because this is an ADD PAGE feature, you need to tell Web Access to “insert before”, “insert after” or “append”. When you are importing a new document and the Document View is empty, it does not matter what you set the value to.

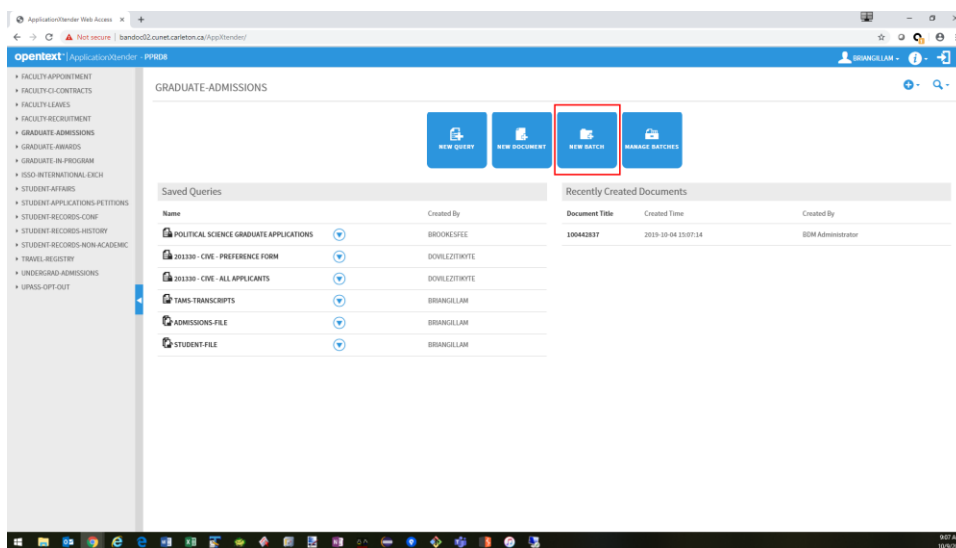


At this point the document is imported into the Document Viewer and ready for indexing. You can scroll through the pages to ensure they are all intact and properly oriented and clear. Steps to index the single document are covered in section 2.1 Indexing a Single/New Document.

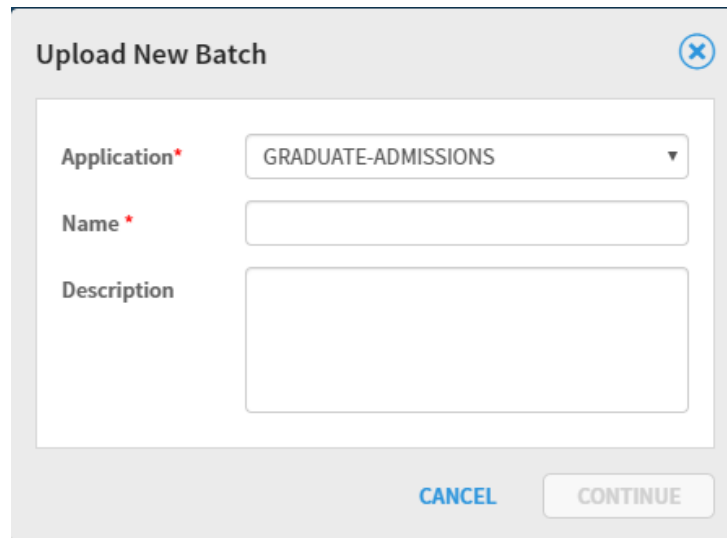
### 1.2 Importing Documents as a Batch

This method is favored when importing multiple documents in bulk to save time or when importing documents in bulk knowing they will be indexed at a later date.

Step 1 – Navigate to the Application List View and select the BDM Application in the left hand pane that you wish to create a batch in. In the right hand pane select the New Batch button on the Application View



Step 2 – in the Upload New Batch window enter a clear and meaningful name for the batch and provide a description. These pieces of information are important for locating batches for processing at later dates. Click CONTINUE when complete.



**Upload New Batch**

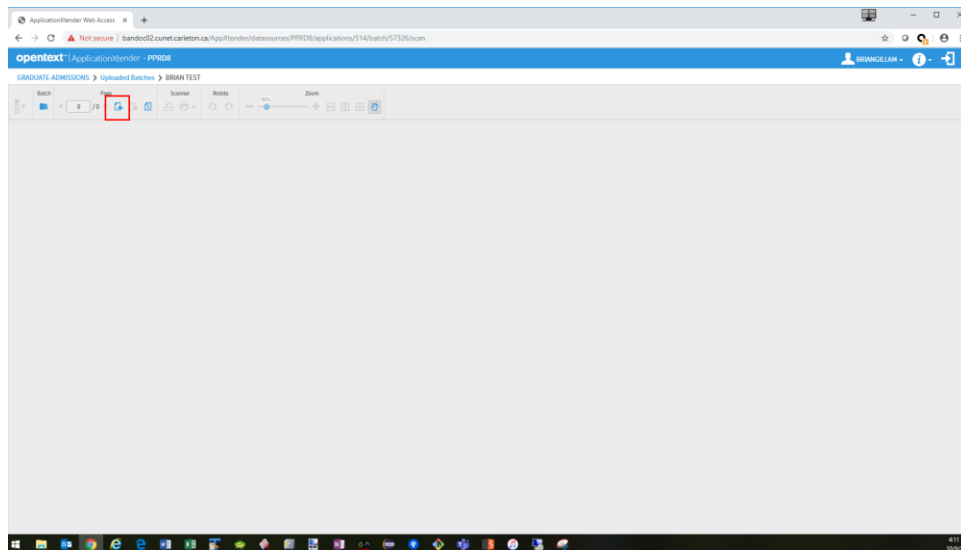
**Application\*** GRADUATE-ADMISSIONS

**Name\***

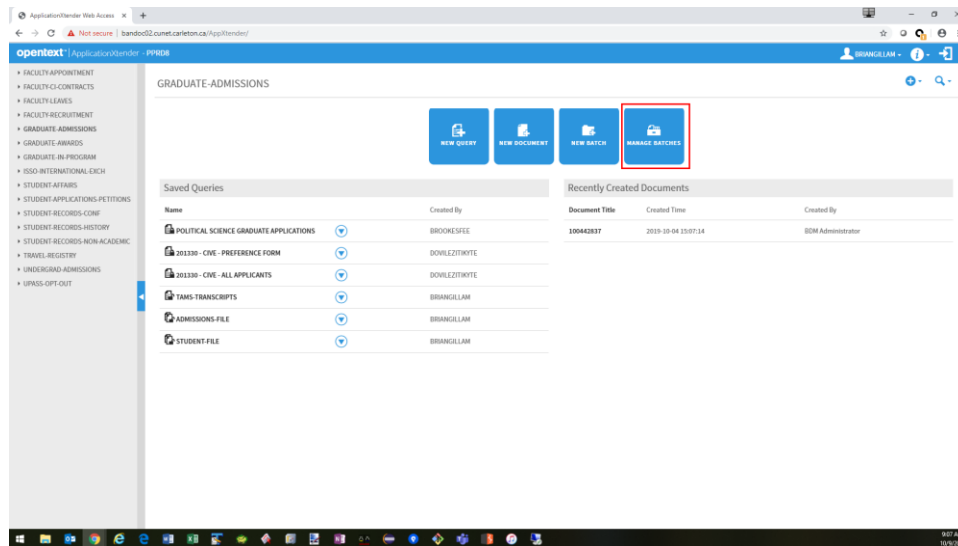
**Description**

CANCEL CONTINUE

Step 3 – in the New Batch view click on the ADD PAGE button in the toolbar to select the documents from the PC or network share



Step 4 – once the New Batch view refreshes with the imported documents, navigate back to the application view and confirm that the batch now exists by clicking on the Manage Batches button in the Application View and navigating to the batch list. Indexing the contents of the batch is covered in the next section.



## Indexing Documents

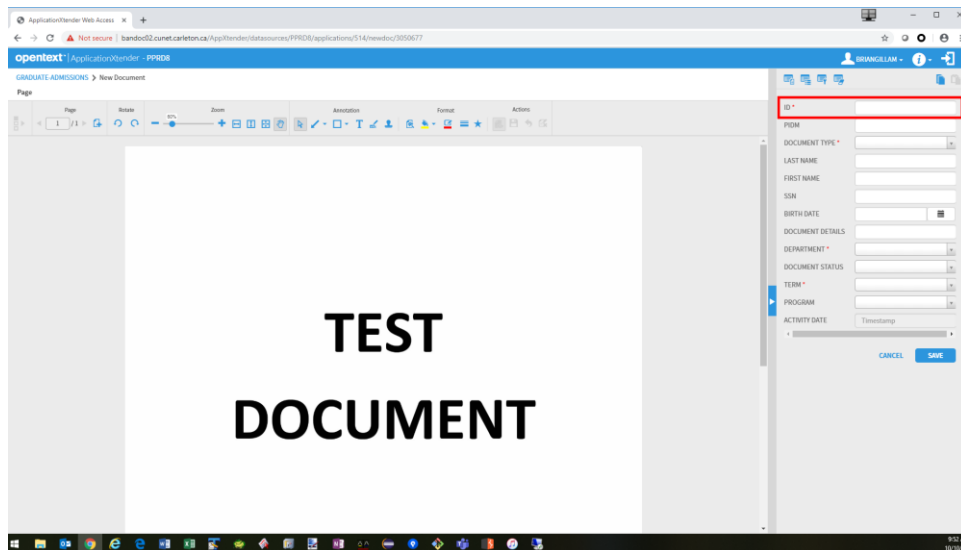
Importing is the first step in storing documents in BDM. Indexing is the second step. The indexing step actually files the document in the system and makes it available to users. Only users that have been granted the appropriate privilege can index documents in BDM using Web Access.

Indexing can be done immediately after importing documents or at a later date and time by opening batches and indexing the documents within them.

### 2.1 Indexing a Single/New Document

Note – these steps are a continuation of the steps in section 1.1 Importing a Single/New Document. The last step in that section would have the user in the New Document View with the document imported and ready for indexing.

Step 1 – click in the ID field in the indexing pane. If the indexing pane is not displayed click the vertical hide bar to expand the pane.



Step 2 – tab away from the ID field to trigger Web Access to capture the PIDM, Last Name, First Name, SSN and Birth Date from Banner for the ID entered.

Step 3 – enter the remaining index fields with the appropriate data values and click SAVE

Notes:

- index fields marked with a red asterisk are mandatory and must be entered
- activity date is disabled but upon saving a current date and time will be applied on the index

## 2.2 Indexing Documents in a Batch

A batch can be comprised of various documents. Documents can be single page or multiple page. The batch can contain documents of the same type or various types. The batch can contain documents for a single person or various persons. All of these possibilities can be summarized in the following two scenarios:

### Scenario 1

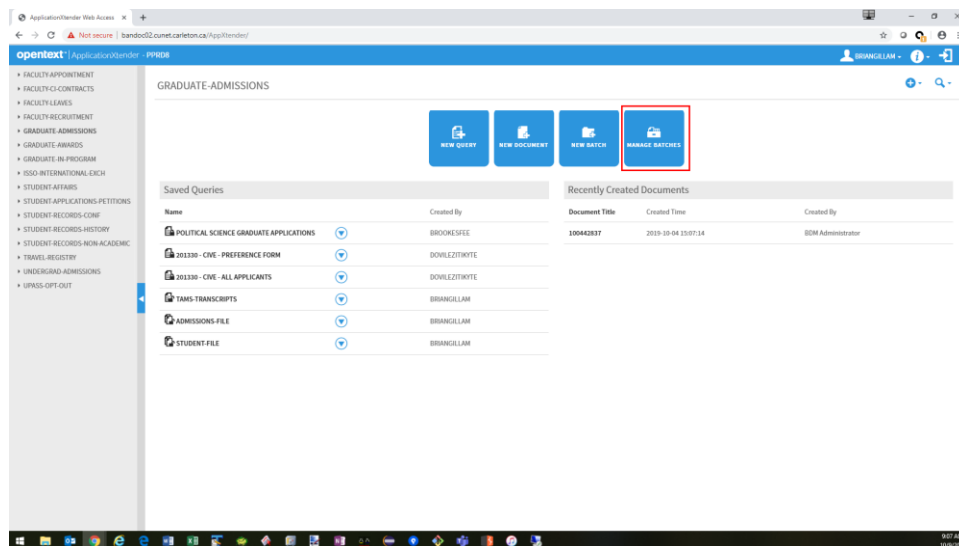
- the batch contains multiple single page or multi-page documents of mixed types for a single person or multiple people
- Ex – an admission package made up of various admission document types for a single applicant
- Ex – multiple admission packages made up of various admission document types for multiple applicants

### Scenario 2

- the batch contains multiple single page or multi-page documents of the same type for a single person or multiple people
- Ex – a collection of transcripts for multiple students
- Ex – a set of reference letters for a single applicant

The method to index the variety of batches all follow these basic steps:

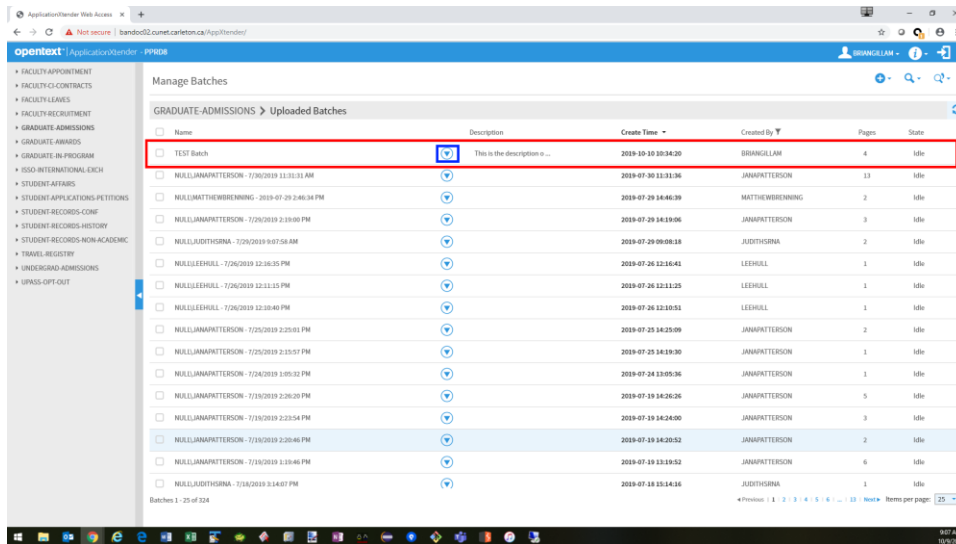
Step 1 – Navigate to the Application List View and select the BDM Application in the left hand pane that contains the batch you wish to index. In the right hand pane select the Manage Batches button on the Application View



Step 2 – on the Mange Batch view locate the batch you want to index in the list. Click on the drop down icon to open the context menu for that batch. In the menu select INDEX.

Note – be sure the status of the batch is IDLE. Any other status indicates the batch is in use by another user.

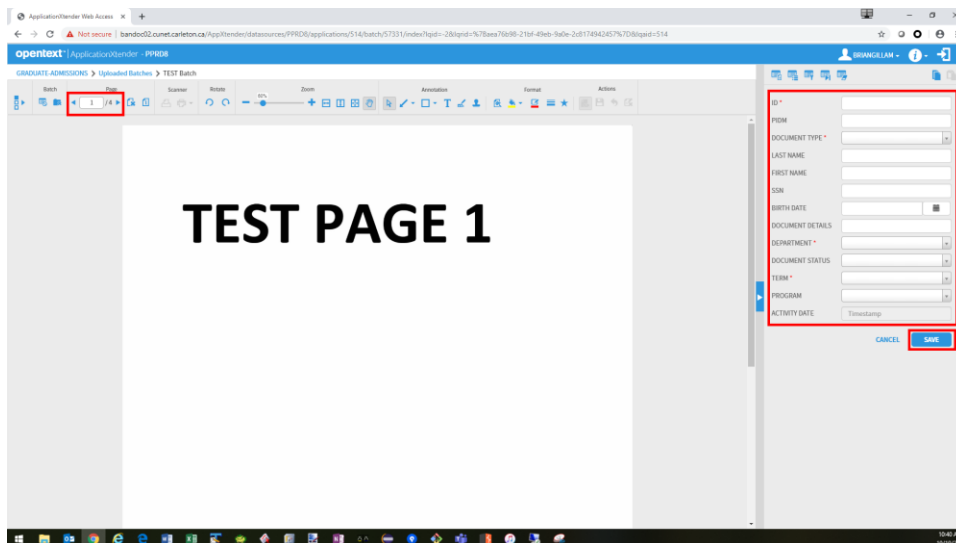




Step 3 – the batch will open in the Indexing View and display page 1 of the batch. The page counter in the toolbar will display as 1 / X (in this case it is 1 / 4). This is not only page 1 of the entire batch but it also represents page 1 of the first document in the batch. That document may be a single page or multiple pages. When indexing a batch you start with indexing this first page of the first document.

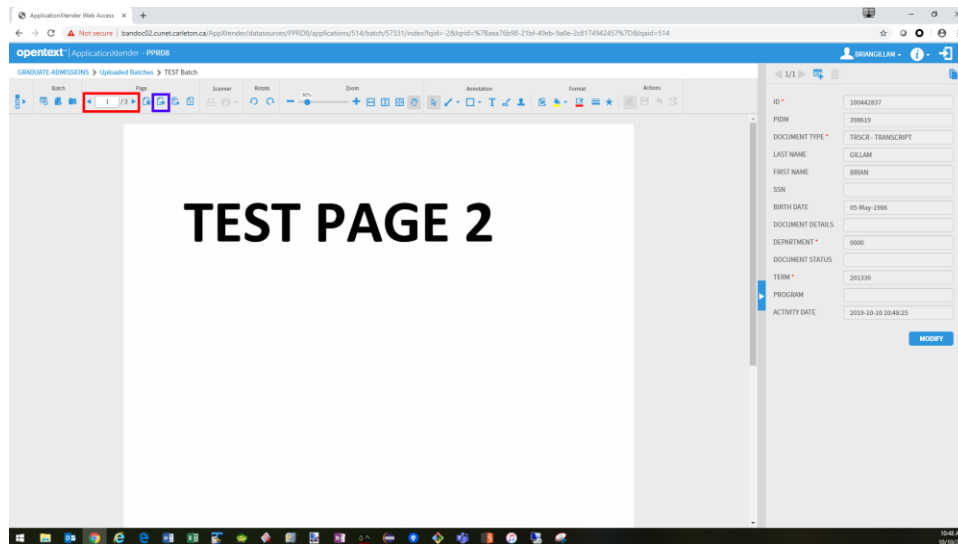
Click into the index page on the ID field. Complete the index with all mandatory fields complete and any optional fields required for accurate indexing. Click SAVE.

The SAVE will index this first page only. The page will disappear, the page counter will change accordingly and the next page in the batch will display.



Step 4 – now you have to decide if the current page belongs with the prior indexed page (i.e. document) or is the start of a new document.

- If the page belongs with the prior indexed page click on the Attach Current Page button in the toolbar. The page will be appended to the prior page, disappear from view and the page counter will change.
- Continue to use the Attach Current Page button to attach all subsequent pages that belong to the document.
- Continue attaching pages until you hit the first page of the next document in the batch



- When you land on a page that marks the start of a new document locate and click the Create Another Document button. This will clear the previous index fields allowing you to enter new data to start the indexing of this next document in the batch. Complete the index fields and click SAVE. You can now proceed to attach current pages until you hit the start of the next document. Note – if this is the last document in the batch then use the Attach All Pages button to index all the remaining pages in the batch to this document.

