

**Banner Document Management  
(BDM)**

**How to Launch Web Access**

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## Overview

Web Access is the web based tool used for interacting with documents within BDM. This tool allows users to import, index, view and manage documents in BDM.

Web Access can be launched one of two ways:

1. From Banner
2. Direct Login

Typical user access to Web Access will be from within Banner. The viewing of documents is most often related to some business process or decision making that is being carried out in Banner. The ability to launch Web Access in an integrated fashion while working within Banner is an advantage to many users.

There are many tasks related to document management that have little or nothing to do with a business process or decision making. Typical base, document management tasks such as scanning, importing and indexing fall within this group.

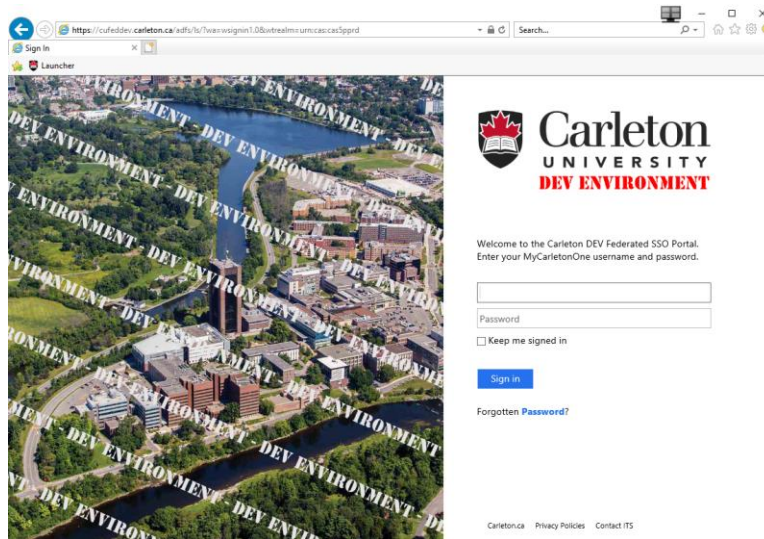
When users are carrying out such tasks the direct method of launching and accessing Web Access tends to be more effective for the user, but can still be done from Banner.

### Note

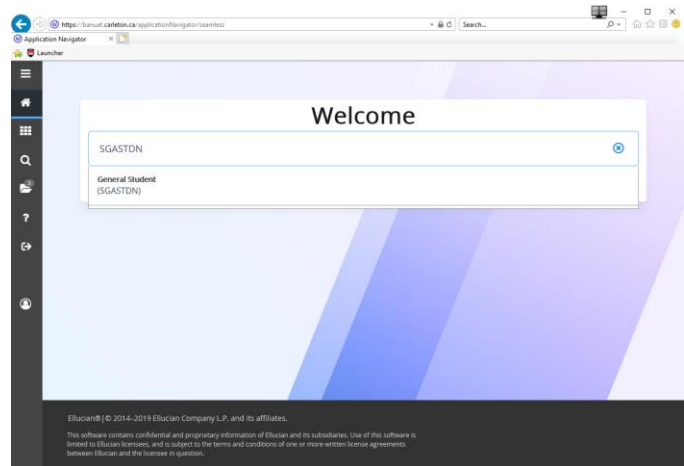
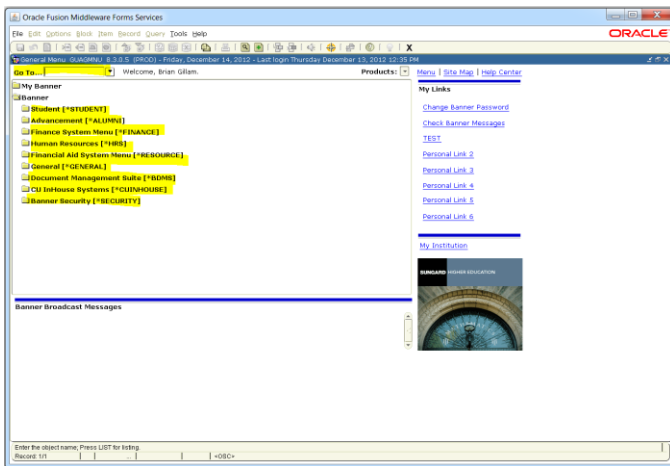
- All users must access Web Access the first time through Banner. To ensure that your BDM credentials match your Banner/MC1 credentials synchronization must take place. This password synchronization is handled from Banner.

## Launching Web Access via Banner

1. Log in to Banner using your MC1 single sign on credentials



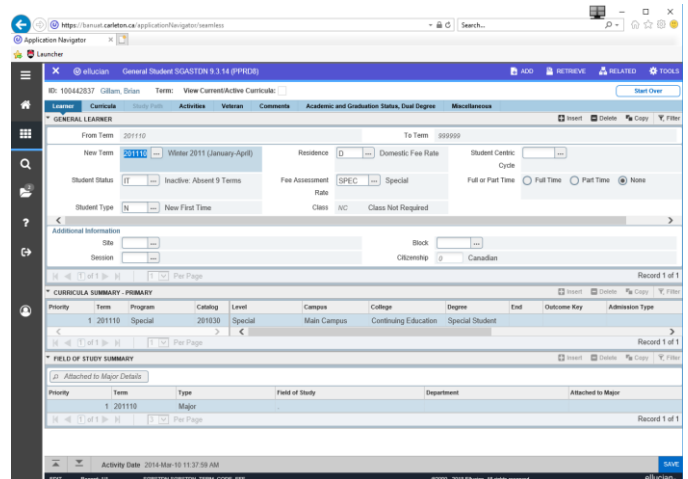
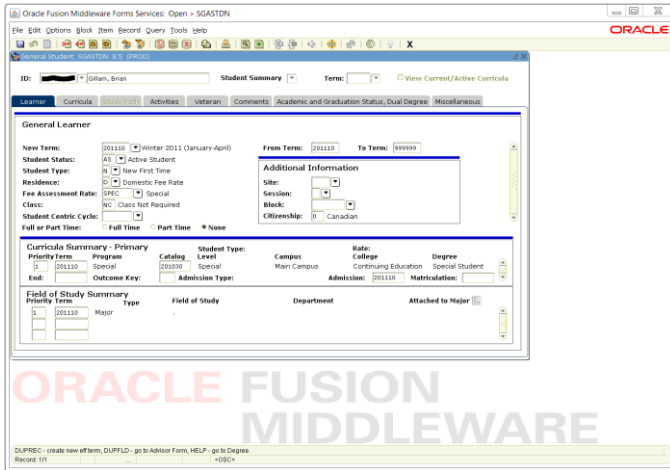
2. Launch the Banner 8 or Banner 9 form that you need to work with. Locate the form using the menu or typing the name of the form in the designated field.



**Note:**

- Accessing Web Access from Banner is reliant on integration between the many Banner forms and BDM Applications.

3. Populate the Banner 8 or Banner 9 form you have open with data for a specific Banner Id.



Notes:

- Integrating from a Banner form to BDM requires that the form contain a Banner Id at a minimum. The Banner Id is the basis of all documents stored in BDM. Some forms may require more than just the Banner Id for its integration.

4. Locate the BDM buttons in the Banner toolbar and choose the one that will open Web Access in the mode you require.

Banner 8 Toolbar



- BDM – Display Document** - used for launching Web Access for viewing documents and will launch Web Access in Query Results View.
- BDM – Add Document** - opens Web Access in the New Document View but only for users that have the privilege to import and index documents into BDM.

Banner 9 Toolbar

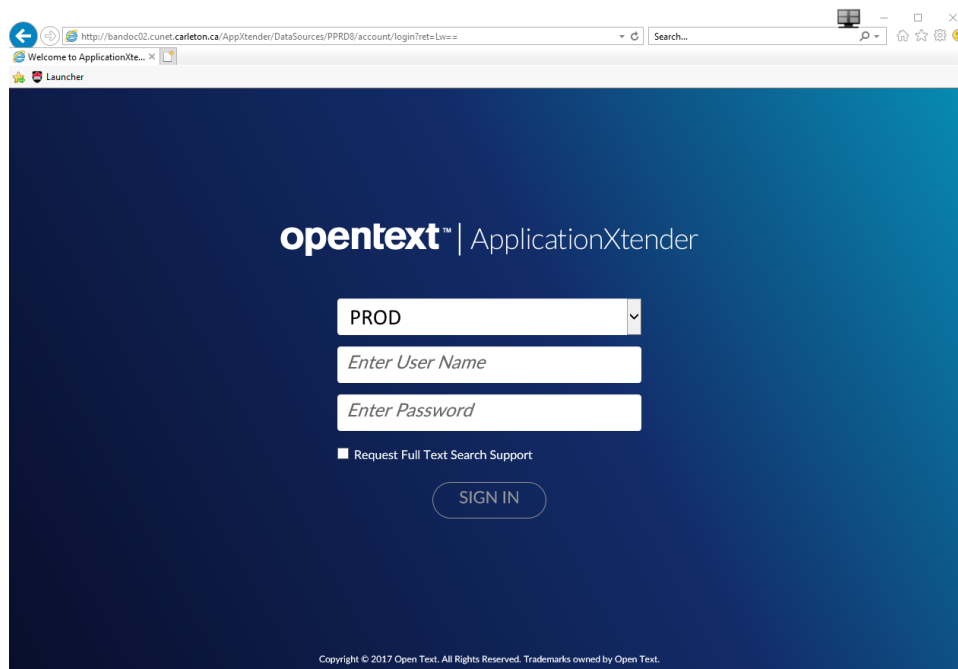


- Retrieve** - used for launching Web Access for viewing documents and will launch Web Access in Query Results View.
- Add** - opens Web Access in the New Document View but only for users that have the privilege to import and index documents into BDM.

## Launching Web Access via Direct Login

This method is typically reserved for launching Web Access for importing and indexing of documents or batches. It is a method to access Web Access for more general use of BDM not related to a specific Banner Id or business process.

1. On your PC open your favorite browser and enter the URL for Web Access Logon.  
**<https://docman.carleton.ca/AppXtender>**
2. The Web Access logon window will display.  
Enter your MC1 username and password in the appropriate fields.



**Note:**

- In order to have your MC1 credentials log you in to Web Access in this manner you must have first accessed Web Access through Banner at least one time so as to have your MC1 credentials synced with BDM

3. Click the **SIGN IN** button.