

**Banner Document Management
(BDM)**

How to Query, View & Print Documents

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Overview

All documents in BDM are stored in electronic form within what is called a BDM Application. These BDM Applications are business specific storage areas that allow us to keep documents organized and stored in areas that pertain to their purpose. You can think of these BDM Applications as specific drawers in a filing cabinet, and the filing cabinet being BDM.

Accessing documents in BDM is primarily done via Banner. While working on Banner forms you can access BDM at any time to view documents that may be related to the Banner ID you are working with.

BDM is the general name that applies to the entire tool set and underlying processes & architecture for document management in Banner. The specific web based tool that we use for user interaction with documents is called Web Access.

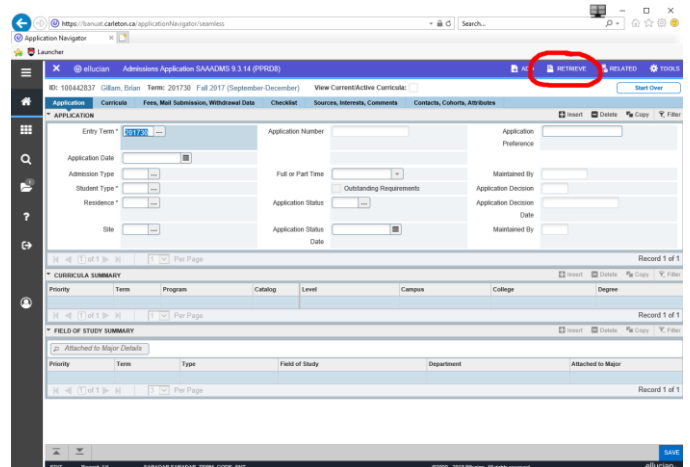
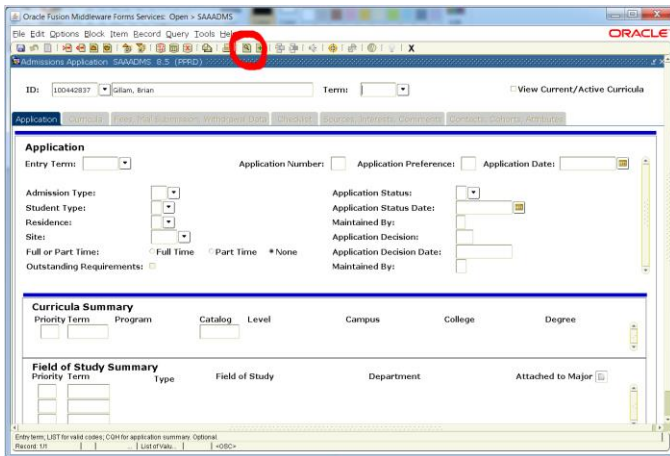
When opening Web Access from Banner there is integration in place that tells Web Access which Application(s) to open and search in for documents. This integration is designed in such a way that each time you launch Web Access from Banner, BDM is queried for documents using the integration rules that are in place for the specific form you are working on. These rules can vary from form to form but in all cases where the Banner form is used for working with students the Banner ID is part of the integration rule by default.

Querying Documents

1.1 Querying From a Banner Form

Banner forms can be integrated to BDM applications or queries to provide quick query access directly from Banner to documents in BDM. Integration criteria are setup and saved in Banner for a form.

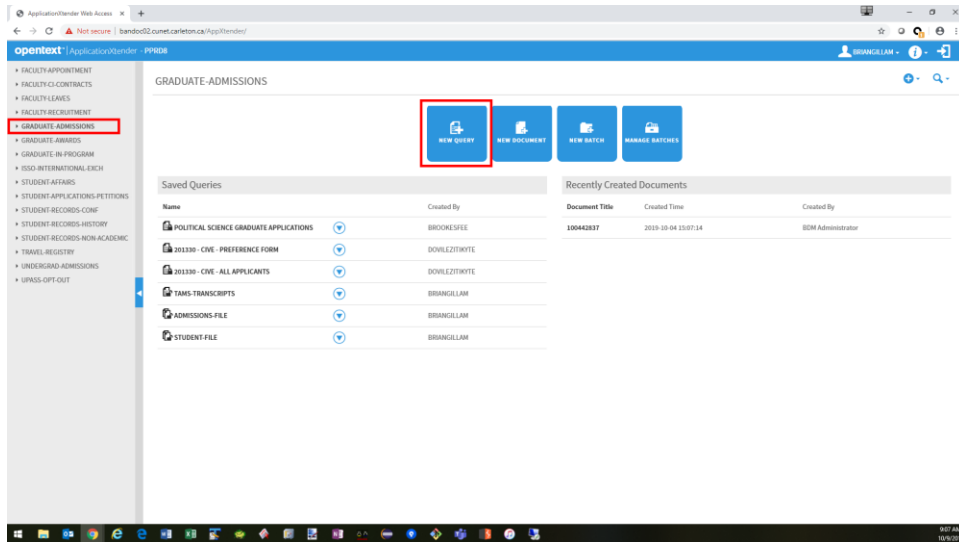
When a user is working on a form and wishes to view documents that are related to the person or student they are working with they simply click the appropriate button to launch Web Access and have it queried using key data from the form they are using. If in a Banner 8 form use the **BDM – Display Documents** button in the toolbar. If in a Banner 9 form, use the **Retrieve** button in the toolbar.



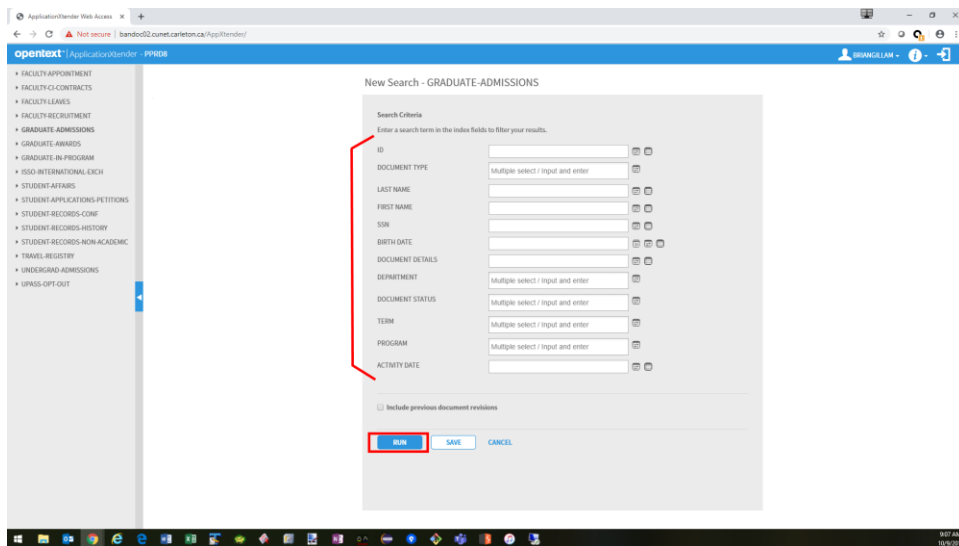
Upon clicking this button the integration rules in Banner will launch Web Access and carry out the query to locate all the documents that match the criteria that integrates the form to BDM.

1.2 Querying in Web Access

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

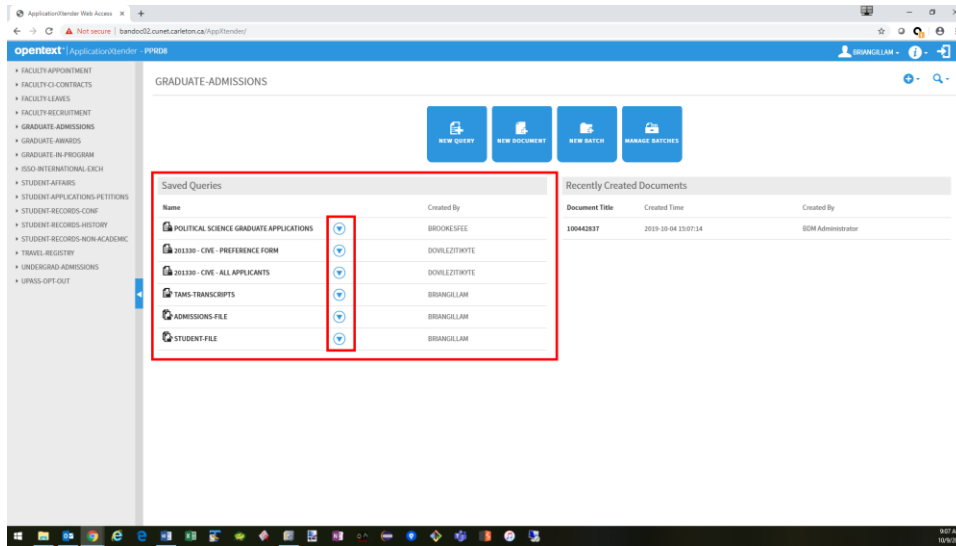


Step 2 –on the query page enter the criteria you wish to search with and click RUN. You will be presented with the Query Results in a new view.

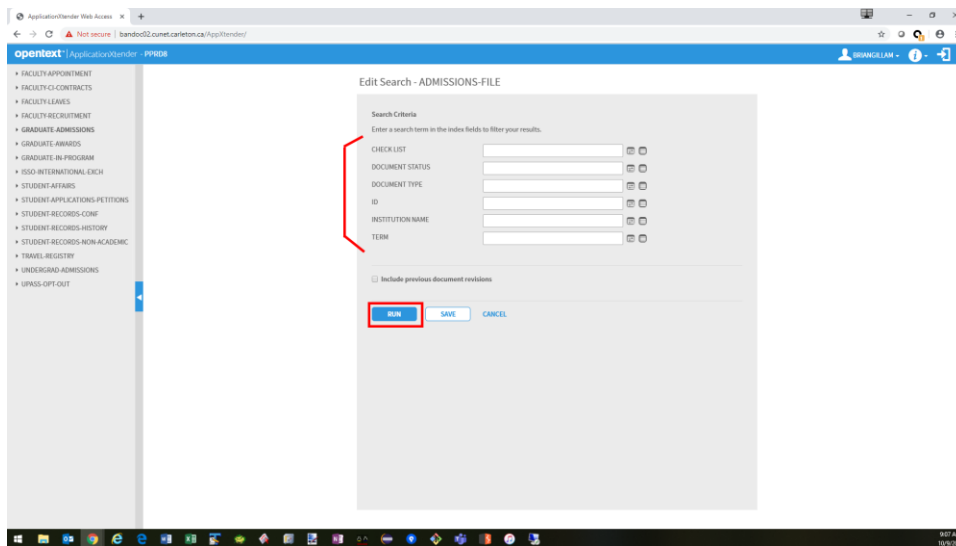


1.3 Querying Using a Saved Query

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 saved query you wish to run. Click the button to the right of the saved query and select RUN. You will be presented with the Query Results in a new view.



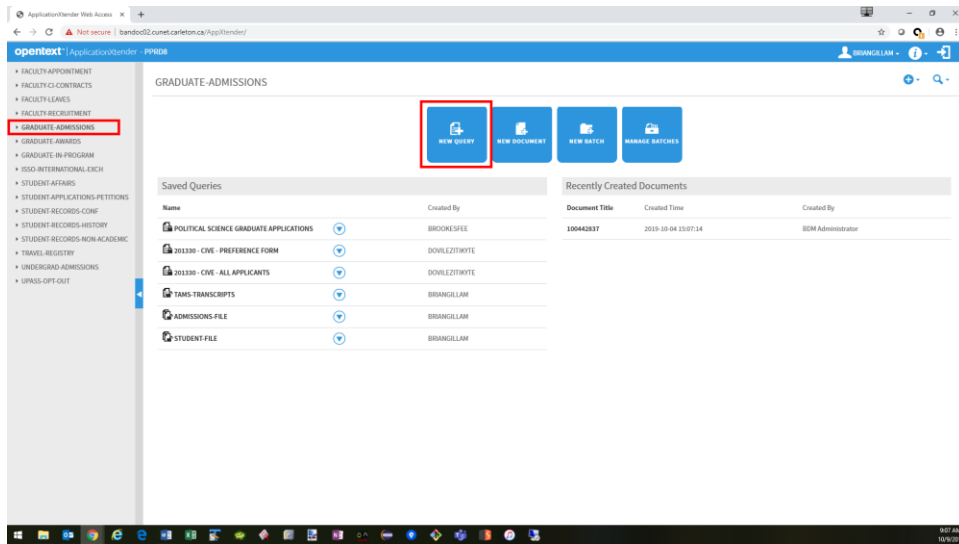
When you select the saved query you want to run you also have the option to edit the query. Choosing this option will open an Edit Search view and allow you to enter criteria to filter the saved query on.



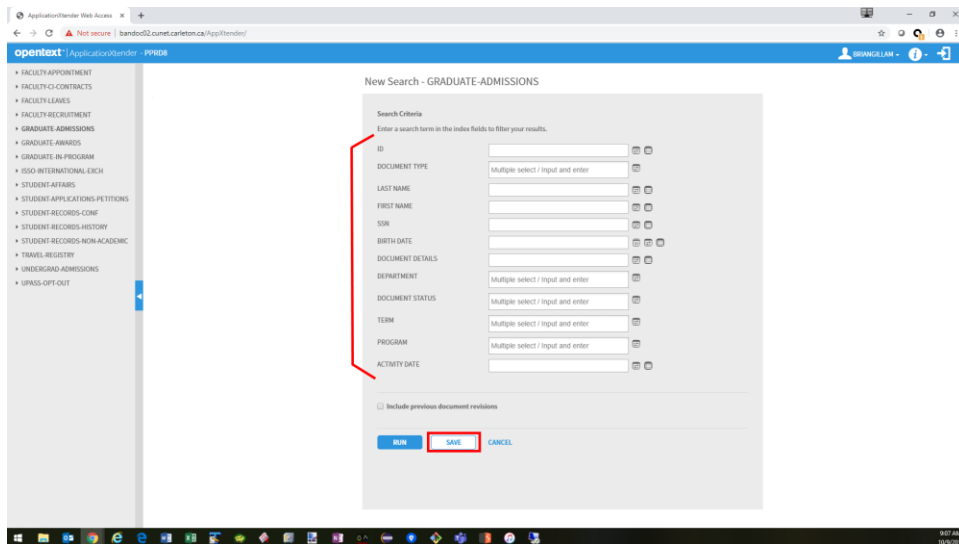
Creating Saved Queries

2.1 Single Application Queries

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

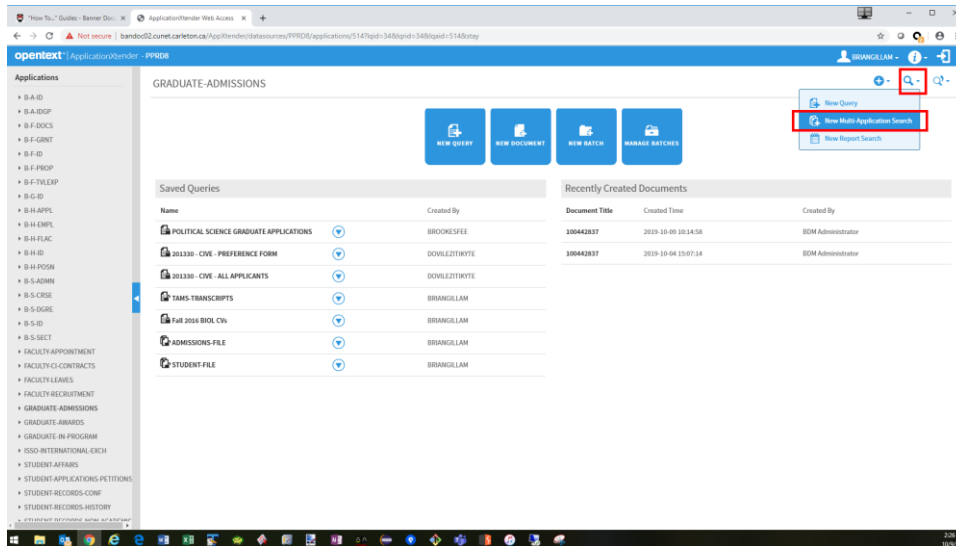


Step 2 – enter the criteria for the query and click SAVE. You will be prompted to name the query and mark the query as being available to all users. Once saved the query will display on the Application View under the Saved Queries header.

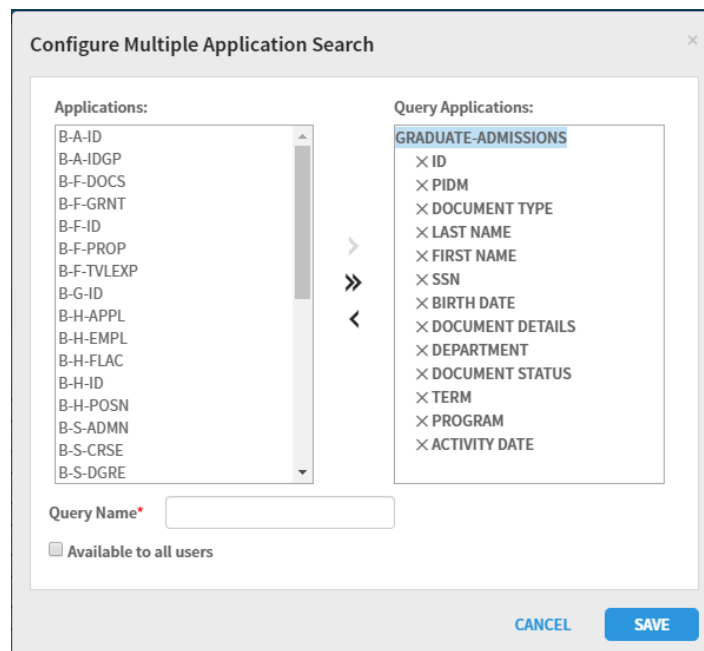


2.2 Multiple Application Queries

Step 1 – Navigate to the Application List View and select the BDM Application in the left hand pane that you wish to create a saved query in. In the right hand pane, select the magnifying glass button in the toolbar and then select New Multi-Application Query in the pop-up menu. A configuration window will open.



Step 2 – the configuration window will open to display two lists. Available applications in the left list and the applications the query is based on in the right list. By default the application you are currently in when starting the creation process will be listed and it will become the application that owns the query.



Step 3 – From the left hand list select the BDM Applications that you wish to include in the multiple application query and add them to the right hand list by clicking the button with the “>” icon. Each application will display in expanded fashion in the right hand list.

Step 4 – Configure the fields you want in the query. To exclude fields from an application leave them with the “X” icon in front of them. To have a field included in the query click the field once to display a check mark in front of it. To make a field available for filtering the query click it twice to display a magnifying glass in front of it.

Note – fields you configure to serve as filters need to be in all the applications the query is based on.

Step 7 – name the query with a clear and meaningful name and check if you want the query to be available to all users. By default these queries are private and have to be enabled for public use.

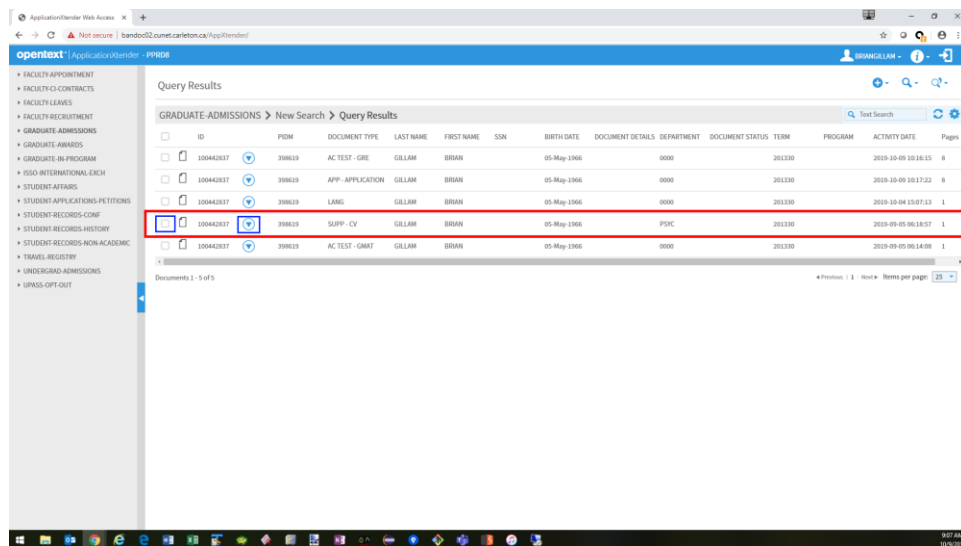
Step 8 – SAVE the query. The query will now display on the Application View page under the Saved Query header

Viewing Documents

Viewing documents is dependant upon a query being run, and a collection of documents returned from that query.

Step 1 – follow the steps above for running a query in Web Access or from Banner

Step 2 – in the Query Results view locate the document you wish to open and view



Step 3 – open the document using one of the following methods:

- Double click the document row in the list
- Check the check box on the document row and select OPEN in the floating menu that appears
- Click the drop down icon on the document row and choose OPEN from the pop-up menu

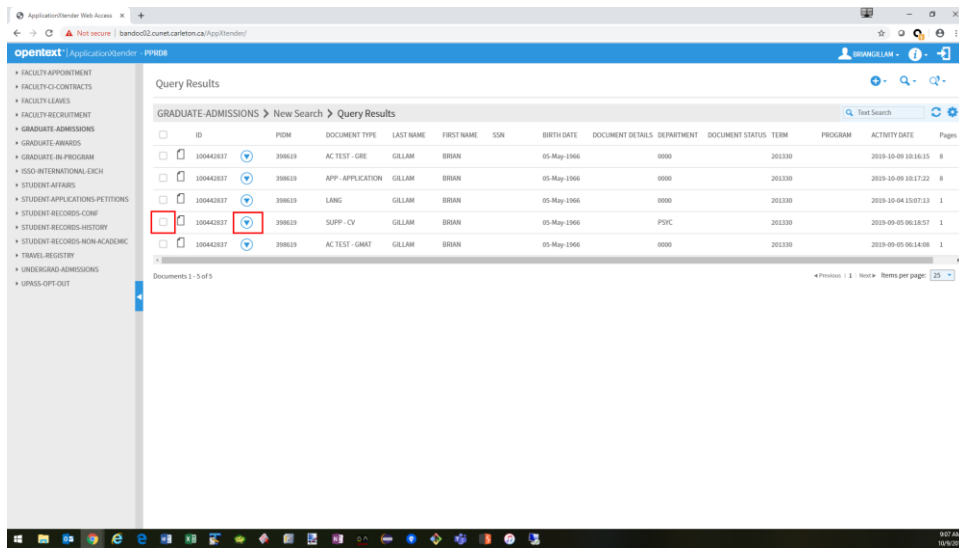
The document will open in the Document View and the user will be able to carry out document management tasks on the document.

Printing Documents

Occasionally in Web Access there may arise the need to print a document or set of documents. A document can be printed from the Query Results View or the Document View after it has been opened. The print feature in Web Access opens the document in a new browser window allowing you to print it using print tools on the PC.

From the Query Results View locate the document you wish to print and use one of the following methods:

- Check the checkbox on the document row and in the floating menu that appears select PRINT
- Click the drop down icon on the document row and choose PRINT from the pop-up menu



From the Document View after the document has been opened for viewing:

- In the Document View toolbar click the PRINT link

