Banner Document Management (BDM)

How to Query, View & Print Documents

Table of Contents

Topics	<u>Page</u>
Overview	3
Querying Documents 1.1 Querying From a Banner Form 1.2 Querying in Web Access 1.3 Querying Using a Saved Query	4 5 6
Creating Saved Queries 2.1 Single Application Queries 2.2 Multiple Application Queries	7 8
Viewing Documents	10
Printing Documents	11

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.

ID: 100442837 Gillam, Brian Term: 201730 Fall 2017 (Application Curricula Fees, Nail Submission, Withdra AppLication	September-December) View Current/Active Curricula:	Start Ov
APPLICATION		Cohorts, Attributes
Entry Term * 2017/30	Application Number	Application Preference
Application Date		
Admission Type	Full or Part Time	Maintained By
Student Type *	Outstanding Requirements	Application Decision
Residence *	Application Status	Application Decision Date
Ste	Amelication Status	Maintained By
	Date	manual of of
		Reco
* CURRICULA SUMMARY		🖬 Insert 🔲 Delete 🍕 Copy
Priority Term Program	Catalog Level Campus	College Degree
M ≪ 1 of 1 ► H 1 ▼ Per Page		Recor
* FIELD OF STUDY SUMMARY		🖬 Insert 🖾 Delete 🧖 Copy
p Attached to Major Details		
Priority Term Type	Field of Study Depart	tment Attached to Major
K ◀ ① of 1 ► N 3 ⊻ Per Page		Reco
	Addictions Type Addictions Type Bit Bit Bit Control Additions Co	Advances Type Advanc

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

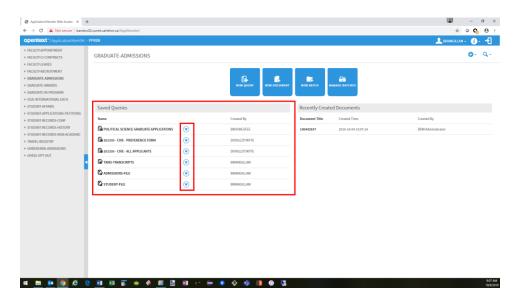
Saved Queries Causard Comments Submit And/Composition of Massions Saved Queries Image: Causard Comments Image: Caus	React Aglicatoryouthore + PHRIB CTANPORTINITY CTANPORTUNITY CTANPORTUN	C A Not secure bandoo	+ c02.cunet.carleton.ca/AppXtender/					₩ - 0 ☆ • 0 0
ARLITY CONTINUES AND LARKING AND AND AND AND LARKING AND	CITY CLOARDING IN AURICIANA AURICIAN	text* ApplicationXtender	- PPRD8					
Savet Queries Recently Created Documents Number AFF/CROND FETTIONS UNDERT AFF/CROND FETTIONS NUMBER ACCORDS FROM ACCORDS NUMBER ACCORDS NUMBER ACCORDS FROM ACCORDS NUMBER ACCORDS NU	ARTISHICOURS COT GRIT AFTAGIS GRIT AFTAGIS	LTY-CI-CONTRACTS LTY-LEAVES LTY-RECRUITMENT UATE-ADMISSIONS	GRADUATE-ADMISSIONS					0 - Q
Non-Records Heritory Non-Records Heritory Records Animolocy Solor Records Animication Records Animicati	Land Control And Long Control And Contreand Conte And Control And Control And Control And Control And C	INTERNATIONAL-EXICH ENT-AFFAIRS	Saved Queries			Recently Creat	ed Documents	
Max Conference Among Conference <td>Bell RECORD AND AND AND AND AND AND AND AND AND AN</td> <td>JDENT-APPLICATIONS-PETITIONS JDENT-RECORDS-CONF JDENT-RECORDS-HISTORY JDENT-RECORDS-HISTORY DERGRAD-ADMISSIONS</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	Bell RECORD AND AND AND AND AND AND AND AND AND AN	JDENT-APPLICATIONS-PETITIONS JDENT-RECORDS-CONF JDENT-RECORDS-HISTORY JDENT-RECORDS-HISTORY DERGRAD-ADMISSIONS						
NEX COPY CUT: C C C C C C C C C C C C C	SIGNAD ASMISSIONS ANIANO - CAVI - ALL APPLICANTS O CONLEXIMINTI D CONLEXIMINTI ANIANO CAVIT TANG TAMONGTINTS O CONLEXIMINTI ANIANO CAVIT INTERVIENTS INTERVIENTS					100442837	2019-10-04 15:07:14	BDM Administrator
ASS-OFF-OUT	S GIFLOUT CITATAS TRANSCRIPTS C DOULZINGTT C DOULZINGTT DOULZINGT DOULZINGT D				DOVILEZITIKIYTE			
	Admissions File Debangulum		201330 - CIVE - ALL APPLICANTS	\odot	DOVILEZITIKYTE			
			TAMS-TRANSCRIPTS	\odot	BRIANGILLAM			
BRIANGILLAM	STUDENT FALE DIMINICILIAN		ADMISSIONS-FILE	\odot	BRIANGILLAM			
Student-File BISINICILIAM			STUDENT-FILE	•	BRIANGILLAM			

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.

ApplicationWander Web Access × +				Ξ - σ ×
← → C 🔺 Not secure bandoc02.cunet.carleton.ca/AppXtender/				± ⊂ 0 ⊟ :
opentext* ApplicationXtender - PPRD8				🔔 BRIANGILLAM - 👍 - 🚽
FACULTY APPOINTMENT FACULTY ALCONTRACTS	New Search - GRADU/	ATE-ADMISSIONS		
FACULTY LEAVES FACULTY RECRUITMENT GRADUATE ADMISSIONS	Search Criteria Enter a search torm in the ind	iex fields to filter your results.		
GRADURTE-AWARDS GRADURTE-IN-PROGRAM ISSO-INTERNATIONAL-DICH	ID DOCUMENT TYPE	Multiple select / Input and enter	00	
STUDINTAFARIES STUDINTAFARIES STUDINTAFARIES	LAST NAME FIRST NAME			
STUDENT-RECORDS-COME STUDENT-RECORDS-HISTORY STUDENT-RECORDS-HOM-ACADEMIC	SSN BIRTH DATE			
TRAVEL-REGISTRY UNDERGRAD-ADMISSIONS	DOCUMENT DETAILS DEPARTMENT	Multiple select / Input and enter		
• UPASS-OPT-OUT	DOCUMENT STATUS	Multiple select / Input and enter	0	
	TERM PROGRAM	Multiple select / Input and enter	0	
	ACTIVITY DATE		0	
	Include previous docume	nt revisions		
	RUN SAVE	CANCEL		
# # # # @ @ @ # # # # @ # # #	on 🧰 💿 🚯 🖬	i 🚺 🙆 🔍		9.67 AM

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.

ApplicationXtender Web Access 🗙 🕂		₩ -
→ C A Not secure bandoc02.cunet.carleton.ca/AppXtender/		* • •
pentext* ApplicationXtender - PPRD8		🔔 eriangillam + 👍 -
FACULTY-APPOINTMENT	Edit Search - ADMISSIONS-FILE	
FACULTY-CI-CONTRACTS	Edit Search - ADMISSIONS-FILE	
FACULTY-LEAVES		
FACULTY-RECRUITMENT	Search Criteria	
GRADUATE-ADMISSIONS	Enter a search term in the index fields to filter your results.	
GRADUATE-AWARDS	CHECK LIST	
GRADUATE-IN-PROGRAM	DOCUMENT STATUS	
ISSO-INTERNATIONAL-EXCH		
STUDENT-AFFAIRS	DOCUMENT TYPE	
STUDENT-APPLICATIONS-PETITIONS	ID	
STUDENT-RECORDS-CONF	INSTITUTION NAME	
STUDENT-RECORDS-HISTORY	TERM	
STUDENT-RECORDS-NON-ACADEMIC		
TRAVEL-REGISTRY		
UNDERGRAD ADMISSIONS UPASS-OPT-OUT	Include previous document revisions	
UPASS-OPT-OUT		
	RUN SAVE CANCEL	
: 🖿 🖻 💿 🤄 🤉 🖬 🕫 🐺 🔶	📓 🛃 👔 💠 🖨 🧿 🚸 🧃 🚺 🚱 🖫	

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.

entext* ApplicationAtender - PPRD8						👤 BRANGELAM	• 🚺 - 🕂
ULTY-CI-CONTRACTS GR ULTY-LEAVES ULTY-RECRUITMENT IDUATE-ADMISSIONS IDUATE-AMARDS	ADUATE-ADMISSIONS			EG. New Batch Ma	ANAGE BATCHES		0 - Q
UATE-IN-PROGRAM INTERNATIONAL-EXCH ENT-AFFAIRS S. ENT-APPLICATIONS-PETITIONS	aved Queries			Recently Create	d Documents		
JENT-RECORDS-CONF	POLITICAL SCIENCE GRADUATE APPLICATIONS	$\overline{\bullet}$	Created By BROOKESFEE	Document Title	Created Time 2019-10-04 15:07:14	Created By BDM Administrator	
ENT-RECORDS-NON-ACADEMIC	201330 - CIVE - PREFERENCE FORM	•	DOVILEZITIKYTE	100442837	2013-10-04 1307/14	BCM Administrator	
RGRAD-ADMISSIONS	201330 - CIVE - ALL APPLICANTS	•	DOVILEZITIKITE				
IS-OPT-OUT	TAMS-TRANSCRIPTS	۲	BRIANGILLAM				
c	ADMISSIONS-FILE	€	BRIANGILLAM				
C	STUDENT-FILE	\odot	BRIANGILLAM				

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.

Application/Otender Web Access × +				₩ - 0
← → C ▲ Not secure bandoc02.cunet.carleton.ca/AppXtender/				÷ 0 🔥
opentext* ApplicationXtender - PPRD8				🔔 BRIANGELIAM + 👔 -
+ FACULTY-APPOINTMENT	New Search - GRADU	ATE ADMISSIONS		
FACULTY-CI-CONTRACTS	New Search - GRADO	ATE-ADMISSIONS		
FACULTY-LEAVES				
FACULTY-RECRUITMENT	Search Criteria			
GRADUATE-ADMISSIONS	Enter a search term in the in	dex fields to filter your results.		
GRADUATE-AWARDS GRADUATE-IN-PROGRAM	ID			
SIGNULATE-IN-PROGRAM	DOCUMENT TYPE	Multiple select / Input and enter		
STUDENT-AFFAIRS		investigate detector in report and control		
STUDENT-APPLICATIONS-PETITIONS	LAST NAME			
STUDENT-RECORDS-CONF	FIRST NAME			
STUDENT-RECORDS-HISTORY	SSN			
STUDENT-RECORDS-NON-ACADEMIC	BIRTH DATE			
TRAVEL-REGISTRY	DOCUMENT DETAILS		00	
UNDERGRAD-ADMISSIONS	DEPARTMENT			
IPASS-OPT-OUT	DEPARTMENT	Multiple select / Input and enter	0	
1	DOCUMENT STATUS	Multiple select / Input and enter		
	TERM	Multiple select / Input and enter	0	
	PROGRAM	Multiple select / Input and enter		
	ACTIVITY DATE			
	Include previous docum	ent revisions		
	RUN SAVE	CANCEL		
🛋 🖿 📴 🤔 🤮 🗐 🗷 🍒 🌸 🌾 I	🔟 🛃 🔟 🗠 🥽 🚸 🐗	ji 📭 😨 😼		

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 tollbar and then select New Multi-Application Query in the pop-up menu. A configuration window will open.

pentext* ApplicationXtender -	12.cunet.carleton.ca/AppXtender/datasources/PPRD8/app	ncadore; 51411qtu-54	angina=34angana=314asaay			☆ © 💊 🖯 🕂 BRWAGLIAN - 👔 - 🚽
	PPRD8					ERIANGILLAM - 🕧 - 🚽
plications	GRADUATE-ADMISSIONS					ତ- ୟ- ଝ
B-A-ID						New Query
B-A-IDGP						A New Multi-Application Search
B-F-DOCS			A	14 IN 1	<u>an</u>	
B-F-GRNT					ANAGE BATCHES	Mew Report Search
B-F-ID						
B-F-PROP						
B-F-TVLEXP	Saved Queries			Recently Create	ed Documents	
B-G-ID B-H-APPL	Name		Created By	Document Title	Created Time	Created By
B-H-EMPL			Created by	Document rice	Created Time	Created by
B-H-FLAC	A POLITICAL SCIENCE GRADUATE APPLICATIONS	\odot	BROOKESFEE	100442837	2019-10-09 10:14:58	BDM Administrator
B-H-ID	201330 - CIVE - PREFERENCE FORM	\odot	DOVILEZITIKYTE	100442837	2019-10-04 15:07:14	BDM Administrator
8-H-POSN	-	-				
B-S-ADMN	201330 - CIVE - ALL APPLICANTS	$\overline{\mathbf{v}}$	DOVILEZITIKYTE			
B-S-CRSE	TAMS-TRANSCRIPTS	\bigcirc	BRIANGILLAM			
B-S-DGRE	0	-				
B-S-ID	Fall 2016 BIOL CVs	$\overline{\mathbf{O}}$	BRIANGILLAM			
B-S-SECT	ADMISSIONS-FILE	\bigcirc	BRIANGILLAM			
FACULTY-APPOINTMENT	STUDENT-FILE	•				
FACULTY-CI-CONTRACTS	La STUDENT-FILE	۲	BRIANGILLAM			
FACULTY-LEAVES FACULTY-RECRUITMENT						
GRADUATE-ADMISSIONS						
GRADUATE-AWARDS						
GRADUATE-IN-PROGRAM						
ISSO-INTERNATIONAL-EXCH						
STUDENT-AFFAIRS						
STUDENT-APPLICATIONS-PETITIONS						
STUDENT-RECORDS-CONF						
STUDENT-RECORDS-HISTORY						

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.

× FIRST NAME × SSN × BIRTH DATE × DOCUMENT DETAILS × DEPARTMENT × DOCUMENT STATUS × TERM × PROGRAM × ACTIVITY DATE

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

pentext* ApplicationXtender -	- PPRD8							🔔 BRIA	NGILLAM + 🧃 •	1
FACULTY APPOINTMENT FACULTY-CI-CONTRACTS FACULTY-LEAVES	Query Results								0- Q-	q.
FACULTY-RECRUITMENT	GRADUATE-ADMISSIONS	New Search > Query Resu	ilts					Q, Tex	rt Search	04
GRADUATE-ADMISSIONS GRADUATE-AWARDS	0 10	PIDM DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN BIRTH DATE	DOCUMENT DETAILS DEPARTMENT	DOCUMENT STATUS TERM	PROGRAM	ACTIVITY DATE	Pag
GRADUATE-IN-PROGRAM	100442837	398619 AC TEST - GRE	GILLAM	BRIAN	05-May-1966	0000	201330		2019-10-09 10:16:1	15 8
ISSO-INTERNATIONAL-EXCH STUDENT-AFFAIRS	100442837	398619 APP - APPLICATION	GILLAM	BRIAN	05-May-1966	0000	201330		2019-10-09 10:17:2	22 8
STUDENT-APPLICATIONS-PETITIONS	100442837	398619 LANS	GILLAM	BRIAN	05-May-1966	0000	201330		2019-10-04 15:07:1	13 1
TUDENT-RECORDS-CONF TUDENT-RECORDS-HISTORY	100442837	398619 SUPP - CV	GILLAM	BRIAN	05-May-1966	PSYC	201330		2019-09-05 06:18:5	57 1
TUDENT-RECORDS-NON-ACADEMIC RAVEL-REGISTRY	100442837 • • • • • • • • • • • • • • • • • • •	398619 AC TEST - GMAT	GILLAM	BRIAN	05-May-1966	0000	201330		2019-09-05 06:14:0	18 1

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

	- PPRD8								🔔 BRIANGILLAM + 🕧 +	-1
FACULTY-APPOINTMENT FACULTY-CI-CONTRACTS FACULTY-LEAVES	Query Results								0- Q- 0	2-5
FACULTY-RECRUITMENT	GRADUATE-ADMISSIONS	New Search > Query	Results						Q Text Search	0 4
SRADUATE-ADMISSIONS SRADUATE-AWARDS	O ID	PIDM DOCUMENT	PPE LAST NAME	FIRST NAME	SSN	BIRTH DATE	DOCUMENT DETAILS DEPARTMENT	DOCUMENT STATUS TERM PRO	GRAM ACTIVITY DATE	Page
RADUATE-IN-PROGRAM	100442837	398619 AC TEST - GR	GILLAM	BRIAN		05-May-1966	0000	201330	2019-10-09 10:16:15	8
SSO-INTERNATIONAL-EXCH TUDENT-AFFAIRS	100442837	398619 APP-APPLIC	ITION GILLAM	BRIAN		05-May-1966	0000	201330	2019-10-09 10:17:22	8
TUDENT-APPLICATIONS-PETITIONS	100442837	398619 LANG	GILLAM	BRIAN		05-May-1966	0000	201330	2019-10-04 15:07:13	1
TUDENT-RECORDS-CONF TUDENT-RECORDS-HISTORY	100442837	398619 SUPP - CV	GILLAM	BRIAN		05-May-1966	PSVC	201330	2019-09-05 06:18:57	1
TUDENT-RECORDS-NON-ACADEMIC	100442837	398619 AC TEST - GN	KT GILLAM	BRIAN		05-May-1966	0000	201330	2019-09-05 06:14:08	1

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

• In the Document View toolbar click the PRINT link

