

**Banner Document Management  
(BDM)**

**How to Query, View & Print Documents in BDM**

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## 1. 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 WebXtender.

The WebXtender interface contains a menu bar containing the typical File, Edit, View and Help menu items as well as a toolbar containing various icon buttons. The toolbar changes from one view to another in WebXtender. Depending on which screen you are working in you will have varying toolbars (i.e. buttons) available to you.

Each button in the toolbar will display a tool tip when you mouse over the button. The tool tip is useful in telling you what each button does. You should take some time when first using WebXtender to examine all the buttons, tool tips and menu items to see what is available to you.

When opening WebXtender from Banner there is integration in place that tells WebXtender which Application(s) to open and search in for documents. This integration is designed in such a way that each time you launch WebXtender 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. Refer to Appendix A for more detail on this integration.

### Note:

1. Because WebXtender is a web based product that runs through a browser and establishes a web session with the BDM server, timing out of sessions has to be realized. Inactivity in WebXtender beyond a certain period of time will cause your session and connection to drop and you will be required to log in again.

## 2. Creating & Saving Queries

### 2.1 Creating Queries within an Application

WebXtender allows users to create queries that they run repeatedly and save them within the BDM application in which they are searching for documents. It should be noted that saving queries for reuse is only of value when the query is based on 3 or more query criteria that never change. If you are querying based on 1 or 2 criteria then it is best to simply create a new query each time you need to do the search.

Step 1 - open a New Query page for the application in which you wish to search

- Double click on the application in the Application List page
- Click the “New Query” button in the toolbar
- In the menu bar click EDIT -> New Query

Show Index Name	Search Value
<input type="checkbox"/> ID	
<input type="checkbox"/> DOCUMENT TYPE	
<input type="checkbox"/> LAST NAME	
<input type="checkbox"/> FIRST NAME	
<input type="checkbox"/> SSN	
<input type="checkbox"/> BIRTH DATE	
<input type="checkbox"/> DOCUMENT DETAILS	
<input type="checkbox"/> DEPARTMENT	
<input type="checkbox"/> DOCUMENT STATUS	
<input type="checkbox"/> TERM	
<input type="checkbox"/> PROGRAM	
<input type="checkbox"/> ACTIVITY DATE	

**Query Options**

Show All documents

Include previous document revisions

**Save Options**

Query Name

Available To All Users

Submit Save Reset

Step 2 – enter the criteria in the available fields you wish to search with

Step 3 – at the bottom the New Query page locate the “Save Options” section. Provide a query name in the available field. If you wish other users to be able to use your query select the “Available to All Users” check box. If you want the query to be private to only you then do not select the checkbox.

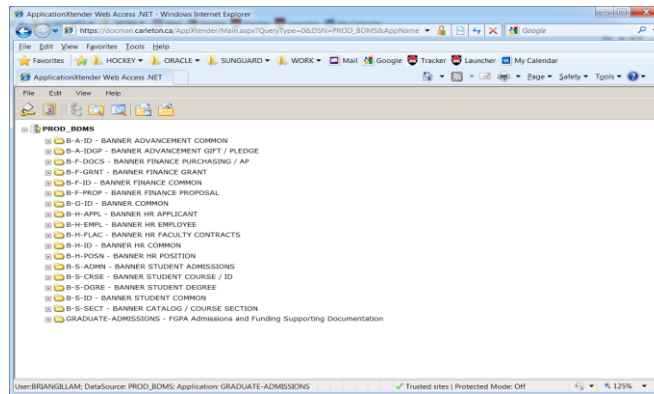
Step 4 – press the SAVE button at the bottom of the New Query page.

The query will now be listed underneath the BDM application when you expand the node in the Application List page

### 2.2 Creating a Cross Application Query

Note – creating cross application queries is only practical when you have access to two or more BDM applications and you need to view documents from more than one application in a single view. These queries can only be created using applications that you have access to.

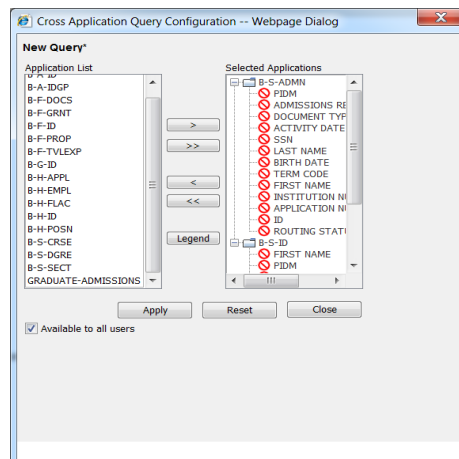
Step 1 – navigate to the Application List page



Step 2 – right click on one of the BDM Applications that you need to search within

Step 3 – from the pop-up menu select “New Cross App Query”

Step 4 – the Cross Application Query Configuration window will open. From the left hand list select the BDM Applications that you wish to include in the cross app 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 5 – Select the fields that you wish to make searchable and act as query criteria fields. To do this, double click the field twice. The first double click will place a tick mark next to the field. The second double click will place a question mark “?” next to the field to indicate that it is searchable.

NOTE – you must select fields that are common to all applications in the query in this step.

Step 6 – Select the other fields that you wish to display in the query results. The fields from step 6 will be included in this set of fields by default. To select others simply double click them in the list. A field that is marked for display will have a “tick” mark in front of it. You can select fields that do not exist in all applications in this step.

Step 7 – check if you want the query to be private or public to all users. By default Cross App Queries are public. To make the query private to only you uncheck the “Available to All Users”

Step 8 – press the APPLY button. You will be prompted to name the query. Once named, you can close the configuration window. The Application List page will refresh and your Cross App Query will be listed under each of the BDM Applications contained in the query.

Notes:

- When you build a cross app query you do not specify any search criteria. They are by default designed to do searches for all documents from the BDM Applications in the query.
- When the results page opens each document returned will display the fields you selected for display when building the query. In addition, the application that the document is coming from will be displayed and the number of pages in the document
- Any field that you marked for display that does not belong to all applications will only display data when the document listed comes from that particular application. If you requested to display a field called “Field 1” from Application A but that same field does not exist in Application B then you will only see data in that field on the results page when the document comes from Application A. Documents from Application B will have this blank.

### 3. Querying Documents

Querying, or searching, for documents can be done within a single BDM Application or within several BDM Applications through a query that joins the applications. These queries are referred to as Cross Application Queries and are saved within one of the Applications that make up the query.

In addition, a BDM Application can contain one or more saved queries that when run collect documents from the application based on some predetermined search criteria. These saved queries are useful for users that find they are searching for the same thing repeatedly.

#### 3.1 Querying From Banner

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 in Banner for a form and saved making it static and consistent for that form. Currently the integration setup in Banner is fundamentally based on Banner ID, thus ensuring that all queries from Banner to BDM are intended to locate documents for the person

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 “BDMS – Display Documents” button in the Banner toolbar:

The screenshot shows the Oracle Fusion Middleware Forms Services interface for the SAAADMS application. The toolbar at the top includes a button labeled "BDMS - Display Documents" which is circled in red. The main form area contains the following sections:

- Application Section:** Includes fields for ID (100442937), Name (Gillam, Brian), Term, and a "View Current/Active Curricula" checkbox. Below this are tabs for Application, Curricula, Fees, Mail Submission, Withdrawal Data, Checklist, Sources, Interests, Comments, and Contacts, Cohorts, Attributes.
- Application Details Section:** Contains fields for Entry Term, Application Number, Application Preference, Application Date, Admission Type, Student Type, Residence, Site, Full or Part Time (radio buttons for Full Time, Part Time, None), Outstanding Requirements, Application Status, Application Status Date, Maintained By, Application Decision, Application Decision Date, and another Maintained By field.
- Curricula Summary Section:** A table with columns: Priority Term, Program, Catalog, Level, Campus, College, Degree.
- Field of Study Summary Section:** A table with columns: Priority Term, Type, Field of Study, Department, Attached to Major.

At the bottom of the form, there is a footer with the text: "Entry term: LIST for valid codes; COH for application summary. Optional. Record: 1/1 | ... | List of Valu... | <OSC>"

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

This Banner integration means users do not always have to open WebXtender and construct their own searches when working with Banner data and processes.

### 3.2 Querying within a BDM Application

Step 1 – launch WebXtender through a browser or through Banner

Step 2 – open the New Query page ensuring that you are opening it for the specific application in which you wish to search. The header text on the New Query page will read “Query Criteria for Application <application name>”. Where <application name> should be the correct name of the application you wish to search within.

The screenshot shows a web browser window with the URL [https://sccmcanon001a.sccmcanon.com/xtender/Main.aspx?Query?open=65026-PROD\\_BDM&Appname=GRADUATE\\_ADMISSIONS](https://sccmcanon001a.sccmcanon.com/xtender/Main.aspx?Query?open=65026-PROD_BDM&Appname=GRADUATE_ADMISSIONS). The page title is "Query Criteria for Application: GRADUATE\_ADMISSIONS". The main content area is a table with two columns: "Show/Hide Name" and "Search Value". The table contains the following rows:

Show/Hide Name	Search Value
<input checked="" type="checkbox"/> ID	
<input checked="" type="checkbox"/> DOCUMENT TYPE	
<input checked="" type="checkbox"/> LAST NAME	
<input checked="" type="checkbox"/> FIRST NAME	
<input checked="" type="checkbox"/> SSN	
<input checked="" type="checkbox"/> BIRTH DATE	
<input checked="" type="checkbox"/> DOCUMENT DETAILS	
<input checked="" type="checkbox"/> DEPARTMENT	
<input checked="" type="checkbox"/> DOCUMENT STATUS	
<input checked="" type="checkbox"/> TERM	
<input checked="" type="checkbox"/> PROGRAM	
<input checked="" type="checkbox"/> ACTIVITY DATE	

Below the table are sections for "Query Options" and "Save Options". The "Query Options" section includes a dropdown for "Number of documents" and a checkbox for "Include previous document versions". The "Save Options" section includes a text field for "Query Name" and a checkbox for "Available To All Users". At the bottom right, there are buttons for "Submit", "Save", and "Reset".

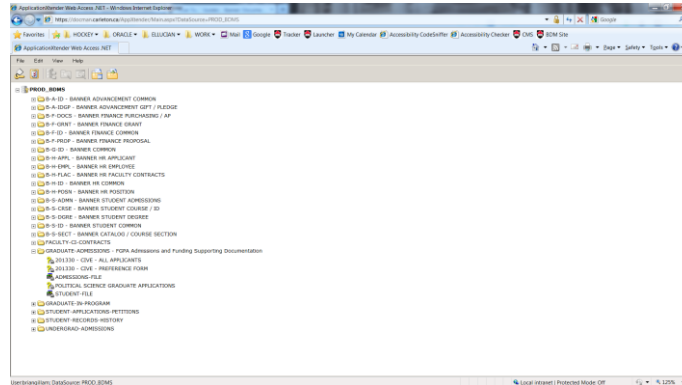
Step 3 – on the New Query page enter the criteria you wish to search with in the list of elements provided under the “Query Criteria...” header text. The list of elements provided are the only items you can use to search for documents.

#### Criteria Notes:

- Each item will be represented by a free text entry field or a pick list.
- You are limited to searching on only one item at a time from the pick lists. The page will not allow you to select more than one item from the list for your query.
- By default the pick list will contain the wildcard, an asterisk (\*). The wildcard acts as an “all” type value.
- For each free text field you have the option of entering individual values, lists of values, a range of values or use wildcards. At the far right of each item are two







Step 4 – locate the saved query you wish to run and double click it in the list. You will NOT be presented with the New Query page. WebXtender will run the query using the criteria that you saved when building the query.

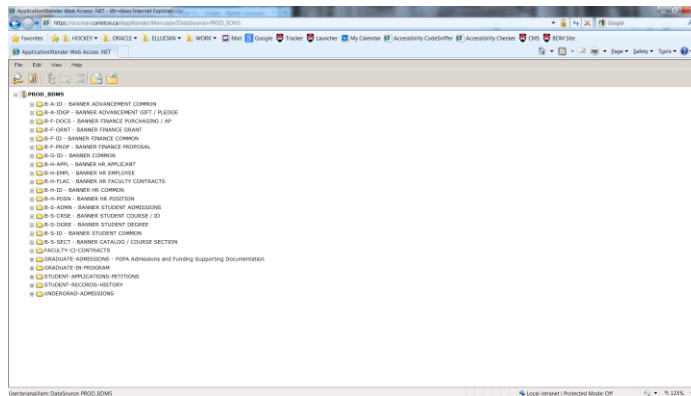
Note:

- You can change the query criteria or add new criteria by right clicking the query in the list and choosing “Edit” from the pop-up menu. The New Query page will open with the saved criteria displayed. Several options are now available to you:
  - a. Add more criteria to the query
  - b. Change existing criteria
  - c. Re-save the changes thus updating the query for future usage

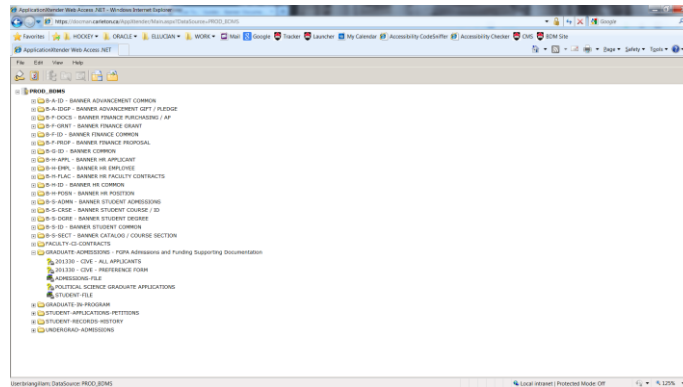
### 3.4 Querying Using a Cross App Query

Step 1 – launch WebXtender through a browser or through Banner

Step 2 – navigate to the Application List page



Step 3 – locate the application that contains the cross app query and click on the “+” icon to the left of the application to expand it

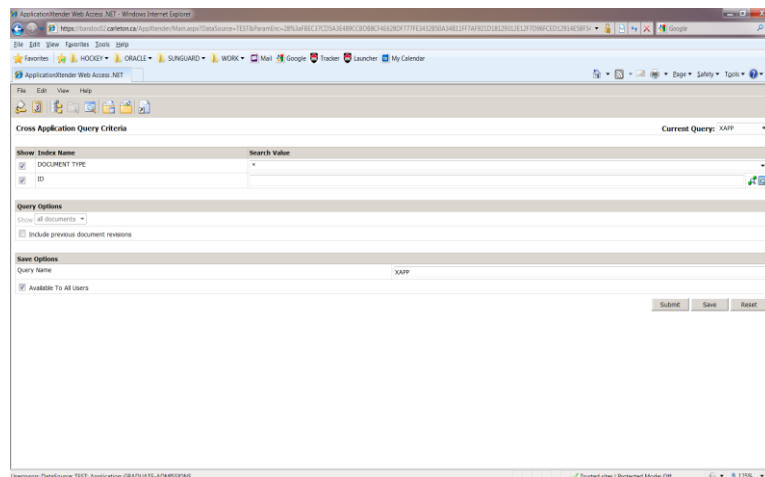


Step 4 – locate the cross app query you wish to run. There are two options available:

- Double click the query and run it in its default configuration. This will return the complete document set from all applications that are in the query.
- Right click the query name in the list and select “Edit” from the pop-up menu. This will open the Query page allowing you to enter criteria to search on. The only criteria available will be the fields that you marked as searchable when building the query.

This is the more practical use.

Step 5 – enter values for the criteria fields and then press the SUBMIT button at the bottom of the query page.

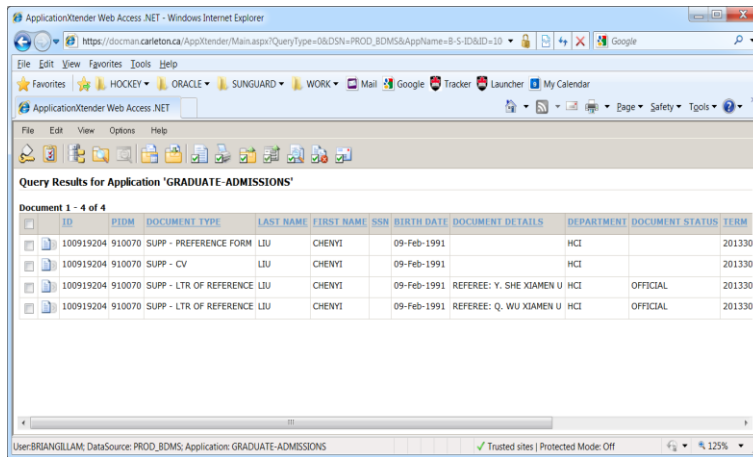


## 4. Viewing Documents

Viewing documents can only be done after a query has been run and a collection of documents returned from that query.

Step 1 – run a query to collect a document or a set of documents.

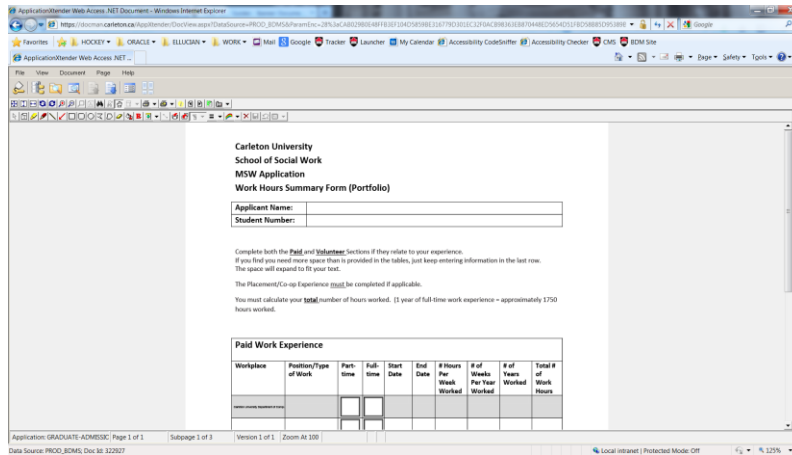
Step 2 – in the Query Results page locate the document you wish to view



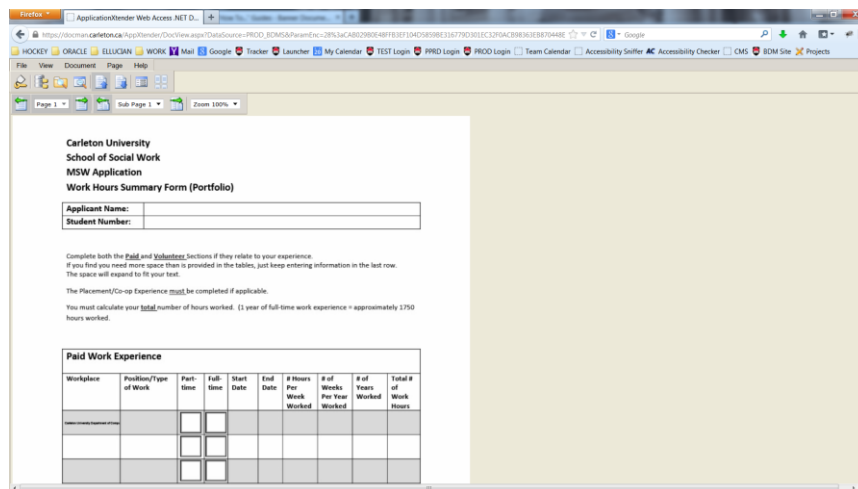
Step 3 – open the document using one of the following two methods:

- Double click the document in the list
- Check the check box next to the document and in the WebXtender toolbar click the “Open Selected Documents” button

Depending on the browser being used the document open in the Document Viewer. If using Internet Explorer the document will open in the Interactive Client Viewer...offering more toolbars and features:



If using a non-Internet Explorer browser the document will open in a Thin Client Viewer...offering limited features and functionality:



## 5. Correcting Page Orientation

On occasion a page in a document may get scanned incorrectly with respect to its orientation. The page may be upside down or sideways. The document gets indexed and the mistake in page orientation does not get recognized until a user attempts to view the document.

Here are the simple steps to follow to fix that one page without having to rescan the entire document or rescanning that page:

1. Open the document in WebXtender for viewing.
2. Scroll to the page that needs to be re-oriented.
3. In the Interactive Viewer (IRC) Toolbar locate the rotate buttons and use one of them to rotate the page until it is in the proper orientation.
4. Once the page is in its proper orientation click on the Page Menu button in the IRC Toolbar.
5. In the options that are presented to you select New Version -> Current View  
Note – you have now created a new version of that page. You now need to delete any old versions
6. Go back to the Page Menu button in the IRC Toolbar and select Purge Versions
7. A pop-up will ask you to confirm the deletion of previous versions. Answer YES.

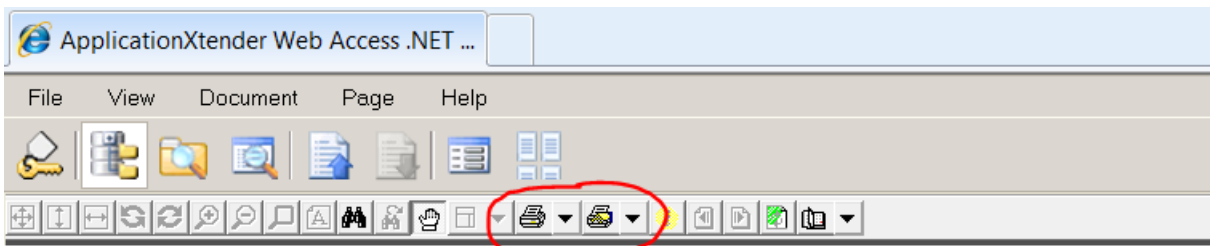
Note – it is **very important** that you purge the previous versions. When the new version is created it creates a new physical file for that version on the network storage drive for BDM. We do not want to leave old versions sitting in storage and the purge will remove them.

## 6. Printing Documents

Occasionally in WebXtender there may arise the need to print a document or set of documents. The following provides details on how to send documents to print from BDM.

- a. Open the document in WebXtender so you are viewing its contents in the interactive viewer
- b. In the interactive viewer toolbar you have two options:
  - i. Print a single page
  - ii. Print the entire document

In the toolbar locate the buttons for printing.



- c. If you wish to print just the page you are viewing use the left print button. If you wish to print all pages of the document use the print button in the right.

Note – there are various other methods of printing documents out of WebXtender.

### 5.1 Emailing

In addition to printing, documents can also be exported and emailed from WebXtender. Exporting is similar to saving the document to your PC.

#### To Email a Document

While viewing the document in the Interactive Viewer do the following:

- a. In the WebXtender menu click Document -> Mail Document
- b. In the "From" line enter your email address.

Note:

- o The first time you use your email address BDM will email you a confirmation email with a code. You will need to paste that code into the appropriate field to register your email address
- c. Enter the "To" address and any "Cc" addresses

- d. Enter the email subject
- e. Choose the message format
- f. Choose if you want to attach the entire document or a page range
- g. By default emails are sent with the document being a hyperlink link. This works OK if the person you are emailing has access to WebXtender and the document you want them to see. If you uncheck this option the document will be attached in normal attachment fashion.

Emailing Notes:

- Multipage documents will be emailed as one attachment per page
- As an option you can export the document and email it as an attachment using MS Outlook.