

Banner Document Management Suite Basic End User Training Workbook

Release 8.1 - December 2008

Updated 12/22/2008



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Revision History Log

Publication Date	Summary
04/29/2008	New version that supports Banner 8.0 software.
12/22/2008	Revised to support Banner 8.1.

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Think before you print.

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Introduction



Course goal

This training workbook is designed for new users of ApplicationXtender. The course will cover all basic functionality of ApplicationXtender.

Course objectives

At the end of this course, participants will be able to:

- Invoke BDMS Queries from a Banner Form
- Add new indexed documents from a Banner Form
- Set up Context Rules on form EXABCXT
- Set up Linking Rules on forms ESALINK and ERALINK
- Enter and Synchronize new document types
- Register new Applications

This workbook also serves as a reference tool, and offers instructions for using the Banner Document Management Suite system.

Intended audience

The intended audience for this manual includes the designated end-user(s) for the Banner products at each institution. You should be familiar with accessing, navigating, and using the Banner product which is appropriate for your area of work.

Prerequisites

To complete this section, you should have completed the Education Practices computer-based training (CBT) tutorial "Banner 8 Fundamentals," or have equivalent experience navigating in the Banner system.

Overview of BDMS



Introduction

Welcome to the Banner Document Management Suite (BDMS) document management enterprise solution for Banner. BDMS is a powerful addition to your family of Banner applications.

Objectives

This section introduces you to the BDMS enterprise solution and describes its key concepts and features. It includes the following:

- Overview of Banner Document Management Suite
- Description of BDMS functionality
- BDMS terminology

Overview of Banner Document Management Suite

Introduction

BDMS is an imaging and electronic document management system for clients who use Banner products. It is designed to meet the imaging and document management requirements of higher education.

BDMS provides integration with the Banner application suite. Specific integration is within each of the five functional areas – Human Resources, Finance, Student, Financial Aid, and Advancement. BDMS works as an integrated product with Banner and Documentum Software's document management system, ApplicationXtender (AX).

Scanning and indexing tie image and document data to Banner information. In addition, ApplicationXtender (as well as other Documentum products) can be used standalone outside the Banner environment so clients can scan important documents which do not need indexing to Banner applications.

Functions

BDMS allows you to:

- Generate a query from within a Banner form
- Limit the scope of the query based on document type, and where applicable, to block level, item level, or value level
- Access ApplicationXtender to view Banner documents online

BDMS Functionality

Introduction

A BDMS toolbar icon is available on all Banner forms. This icon allows you to access the AX application from within Banner. It also allows auto-querying of objects based on the cursor's location (touchpoint) within a Banner form.

ApplicationXtender can run stand-alone and can store index values that are not Banner-related.

Clients are able to utilize ApplicationXtender, DiskXtender, WebXtender, and OCR/ICR applications without Banner for information that doesn't logically fit with Banner. Documents such as letters to college personnel, can be captured and managed in this way.

ApplicationXtender can manage and view the images, and WebXtender can make these images available on the Web.

- Clients may scan and index documents singularly or in batch
- All documents can be retrieved through Banner and AX stand-alone, subject to security restrictions
- Images and documents are available across the entire enterprise, including both client server-connected Banner workstations and clients using the Web-enabled version of Banner

Banner 8 Enhancements to BDMS

Enhancements

The following technical enhancements are part of the Banner 8.0 release.

HR FLAC Self-Service Integration with BDMS

The BDMS 8.0 release includes streamlining of the optional integration components and guidelines for linking the HR Faculty Load and Compensation Self-Service Banner enhancement, delivered with Banner HR 8.0 and Employee Self-Service 8.0 to the AppXtender Web Access (WX) product.

For technical details on this enhancement, please refer to the *Banner Document Management Suite 8.0 Release Guide*.

Financial Aid Requirements Linking

The BDMS 8.0 Financial Aid requirements linking process was modified to accommodate the addition of a new Active indicator field in Financial Aid's Tracking Requirements Table (RTVTREQ) and their Fund Code table (RFRBASE). The new fields were added as part of the new Financial Aid Algorithmic Packaging enhancement for Financial Aid 8.0.

BDMS PL/SQL packages and forms for the tracking requirements linking functionality in BDMS have been modified accordingly.

For technical details on this enhancement, please refer to the *Banner Document Management Suite 8.0 Release Guide*.

Internationalization

- BDMS 8.0 has been certified to work with databases using the UTF8 standard.
- BDMS 8.0 PL/SQL packages and some forms have been modified to accommodate column name expansions for the First Name and Social Security Number columns.

For technical details on this enhancement, please refer to the *Banner Document Management Suite 8.0 Release Guide*.

BDMS Terminology

Annotation

Note or shape you can add to a document page, typically to focus attention on a particular part of the page.

Application Xtender™ (AX)

Component of Documentum Software's suite of Document Management Suite™ products that facilitates file/object storage, OCR, and many other features for document management.

BDMS Application

Index-driven data storage structure where documents can be stored and retrieved. An application stores related documents pertaining to a specific functional area.

BDMS-enabled

Form has been regenerated (recompiled) following installation of Banner General 6.1.

BDMS Query icon

Icon on the Banner toolbar which, when clicked, opens the ApplicationXtender product so a query can be performed.

BDMS Add Document icon

Icon on the Banner toolbar which, when clicked, opens the ApplicationXtender product so a new document may be indexed.

Context

Actual cursor location within a Banner form where you are when you click the BDMS icon to access the ApplicationXtender system and create a query.

Document

File or group of files stored in an application and identified by one unique set of index information. Each page of a document is a single object, such as a scanned image file or a word processing document. A document can be as small as one page, or it can contain thousands of pages.

Document Type

User-defined code that identifies each type of document that is stored and indexed in a BDMS application.

Index

Group of fields where information relating to documents is stored. When a document is stored in an application, the index values you enter identify the document.

Documentum

Formerly OTG Software, Inc., and Legato Systems, Inc. (Bethesda, MD). The SunGard Higher Education partner for this integrated enterprise solution.

Page

Single object within a document. Each page of a document shares the document's index values.

Banner Document Management Suite (BDMS)

Combination of the ApplicationXtender product with all the Banner-based software that integrates the two products into a functional model where Banner can drive AX.

Newest Enhancements

What's new

The following enhancements are among the improvements shipped with Banner Document Management Suite 8.1:

- The BDMS Query and Add Documents icons have been adjusted to reflect the product's name change to Banner Document Management Suite.
- BDMS has been certified with ApplicationXtender version 5.40 SP1.
- Integration with the new Banner Travel and Expense Management module has been added. More information on this integration is available in the Banner Travel and Expense Management documentation.

Using Banner Document Management Suite



Introduction

Before using Banner Document Management Suite, you should know about BDMS applications, the BDMS icon, and context rules.

Objectives

BDMS Applications

Introduction

A BDMS application is an index-driven data storage structure where documents are stored and retrieved. Banner Document Management Suite includes 18 BDMS applications.

Not all of the applications are available to every user. You can access only those applications that are appropriate to your area of functionality.

Applications delivered

The applications delivered with BDMS are:

Banner Product	Banner Document Management Suite Applications
Advancement	Advancement – Gift/Pledge-Related (B-A-IDGP) Advancement – ID-Related (B-A-ID)
Human Resources	Human Resources – ID-Related (B-H-ID) Human Resources – Employee-Related (B-H-EMPL) Human Resources – Applicant-Related (B-H-APPL) Human Resources – Position Control Related (B-H-POSN)
Finance	Finance – ID-Related (B-F-ID) Finance – Document-Related (B-F-DOCS) Finance – Grant Related (B-F-GRNT) Finance – Proposal Related (B-F-PROP)
Student	Student – ID-Related (B-S-ID) Student – Admissions-Related (B-S-ADMN) Student – Course Reference-Related (B-S-CRSE) Student – Degree Number-Related (B-S-DGRE) Student – Section Related (B-S-SECT)
Financial Aid	Financial Aid – ID-Related (B-R-ID) Financial Aid – Tracking Requirement-Related (B-R-TREQ)
General	General – ID-Related (B-G-ID)

BDMS Context Rules

Introduction

Context rules define the actual cursor location (context) within the Banner form that you are in immediately before you click the BDMS icon on the Banner toolbar.

When the BDMS icon is clicked, ApplicationXtender (AX) or WebXtender (WX) is accessed and the query is run based on the location of the cursor within the Banner form.

The rule identifies the BDMS application that is used in the query, as well as the document type. If no document type is specified in the rule, the query will run for all document types within that BDMS application.

Types

There are four types of context rules in BDMS:

- Form-level rules run a query from any location on the Banner form.
- Block-level rules run a query from any location within a specific block of a Banner form.
- Item-level rules run a query from a specific field within a Banner form.
- Item-value-level rules run a query based on the value of the specific field within a Banner form.

Examples

In example 1, clicking the BDMS icon anywhere in SPAPERS uses the B-S-ID BDMS application to query all document types.

In example 2, clicking the BDMS icon anywhere in the SARADAP block in SAAADMS uses the B-S-ADMN BDMS application to query the Admissions Application document type.

In example 3, clicking the BDMS icon in the **SPBPERS_SSN** field of the SPBPERS block in SPAPERS uses the B-S-ID BDMS application to query the Social Security Card document type.

In example 4, clicking the BDMS icon in the **SPBPERS_DEAD_IND** field when it has a value of *Y* in the SPBPERS block in SPAPERS uses the B-S-ID BDMS application to query the Death Notice document type.

#	Form Name	Block Name	Item Name	Item Value	BDMS App	Doc Type
1	SPAPERS				B-S-ID	
2	SAAADMS	SARADAP			B-S-ADMN	ADMISSIONS APP
3	SPAPERS	SPBPERS	SPBPERS_SSN		B-S-ID	SSN CARD
4	SPAPERS	SPBPERS	SPBPERS_DEAD_IND	Y	B-S-ID	DEATH NOTICE

Context Rules Hierarchy

When a query is executed, the level of the context rule involved determines the results returned by the query. A form level rule can be superseded by a rule that has higher priority. The priority of rules from lowest to highest is form, block, item, and item-value.

If two or more rules apply to a cursor location, the rule with the highest priority takes precedence. For example, if an item-level rule and a block-level rule both apply to a specific field, the item-level rule has higher priority and is used to run the query.

Banner Linking

Introduction

Functionality is in place in BDMS to allow the indexing of certain Student and Financial Aid documents to automatically update Banner data.

Situations

There are two specific situations when indexed documents in AX automatically update Banner data:

- When a Banner Student Admissions checklist requirement document (for example, a high school transcript) is indexed in AX
- When a Banner Financial Aid Tracking Requirements checklist document (for example, a savings statement) is indexed in AX

The indexing of these documents in AX is essentially the same as marking them as “received” in Banner, which means that there is no need to manually update Banner. Double processing is eliminated.

Attaching Documents

Introduction

The ability to toggle between Banner and the Documentum system allows scanning, indexing and querying to be accomplished with one login. The BDMS system comes with 18 delivered applications, complete with context points, Banner linking and document types already in a validation table.

Levels

Documents can be attached on any of four levels:

- Form - Documents may be attached and queried at this level. Any documents attached at a lower level (the Block, Item or Item value) may also be queried.
- Block - Documents may be attached and queried at this level.
- Item - Documents may be attached and queried at this level.
- Item Value - Documents may be attached and queried at this level.

Requirements

The appropriate context rules must be in place to allow the documents to be attached at any of these levels. In addition, the context rules also identify the Imaging application that the documents will be queried and attached through.

The scanning and indexing process is the primary method of obtaining documents and attaching them to the Banner system.

Correcting Indexes

Introduction

Occasionally, mistakes are made when indexing documents. When this happens, corrections need to be made.

Methods

With the BDMS system, the correction is accomplished by exporting the document to the desktop, importing it back in and re-indexing it.

Alternatively, the document may be cut to the clipboard, and then pasted as a new document and indexed to the correct individual.

Once the document has been re-indexed, the version of the document that was in error should be deleted. Remember to remove the erroneous document from the desktop, as well.

Executing Queries in BDMS



Introduction

This section discusses BDMS queries and how to execute them in Banner.

Objectives

BDMS Display Documents Icon

Introduction

A BDMS Display Documents icon has been added to the Banner toolbar. This icon allows you to open ApplicationXtender from within Banner and execute queries. It also allows autoquerying of objects based on the location of your cursor (touchpoint) within a Banner form.

Defaults

By default, client/server Banner will attempt to open ApplicationXtender first, and WebXtender if AX is not available on the workstation. On the other hand, INB (Internet Native) Banner will default to the WebXtender application when the BDMS icon is invoked. These defaults may be overridden by selecting the <Tools> menu and choosing <User Preferences> to invoke the EXAUPRF form. Additional bridging components must be installed to use one of the non-default options.

Icon

Here is an enlarged image of the BDMS Display Documents icon:



BDMS Add Document Icon

Introduction

A BDMS Add Document icon has been added to the Banner toolbar. This icon allows you to invoke ApplicationXtender (or WebXtender) from within Banner and index a new document from an imported file. In addition, this feature will open the appropriate application to store the new document based on the context rules outlined above, and will auto-fill the index fields with the information from the currently selected student record in Banner.

Icon

Here is an enlarged image of the BDMS Add Document icon:



The next lesson contains a screen capture of a Banner form with the BDMS icons on the toolbar.

Running a Query from Banner

Steps

1. Access the appropriate form in Banner.
2. If the query can be executed at block-level, item-level, or item-value-level, place the cursor at the appropriate location in the form.

If the query is to be executed at form-level, the cursor can be placed anywhere in the form.

3. Click the BDMS Query icon on the Banner toolbar.

Your results are automatically displayed in ApplicationXtender (or WebXtender).

Oracle Developer Forms Runtime - Web: Open > SAAADMS

File Edit Options Block Item Record Query Tools Help

Admissions Application SAAADMS 8.1

ID: Term: View Current/Active Curricula

Application Curricula Fees, Mail Submission, Withdrawal Data Checklist Sources, Interests, Comments Contacts, Cohorts, Attributes

Application

Entry Term: Application Number: Application Preference: Application Date:

Admission Type: Application Status:

Student Type: Application Status Date:

Residence: Maintained By:

Site: Application Decision:

Full or Part Time: Full Time Part Time None Application Decision Date:

Outstanding Requirements: Maintained By:

Curricula Summary

PriorityTerm	Program	Catalog	Level	Campus	College	Degree
<input type="text"/>	<input type="text"/>	<input type="text"/>				

BDMS Messages

Message types

When executing a query, messages display to give you the information pertaining to the query, or to the status of the system. There are two types of messages:

Tooltip messages – Customized messages which display by right-clicking the BDMS icon; messages are based on the results returned during the execution of a query.

Alert messages – Messages which display if you are not set up to use BDMS, or if the required software is not present.

Tooltip Messages

The following messages appear during a “right-click” of the BDMS icon on the Banner toolbar:

- *Banner Document Management Suite* – Displays whenever the mouse is moved over the BDMS icon at a non-BDMS site. This message also appears at a BDMS site until AX is opened.
- *(Customized text, based on a real query of AX Data)* – Displays when you right-click the BDMS icon and AX is running. This will only occur when BDMS is installed and the form has been BDMS-enabled.
- *No Banner Document Management Suite Context Rules Apply to This Location* – Displays when the mouse is right-clicked on the BDMS icon at BDMS sites where the form has been BDMS-enabled and no context rules apply to the cursor

Alert Messages

- *The link to Banner Document Management Suite cannot be established because the required software is not present. For information about Banner Document Management Suite, contact your Account Consultant.*
Displays when the BDMS icon is clicked and the form is not BDMS-enabled.
- *While Banner Document Management Suite is installed at your site, you are not set up as a user in that system. Please contact your Administrator for information.*
Displays when the BDMS icon is clicked and the Banner form is BDMS-enabled, but you have not been set up as a user.

Exercises



Introduction

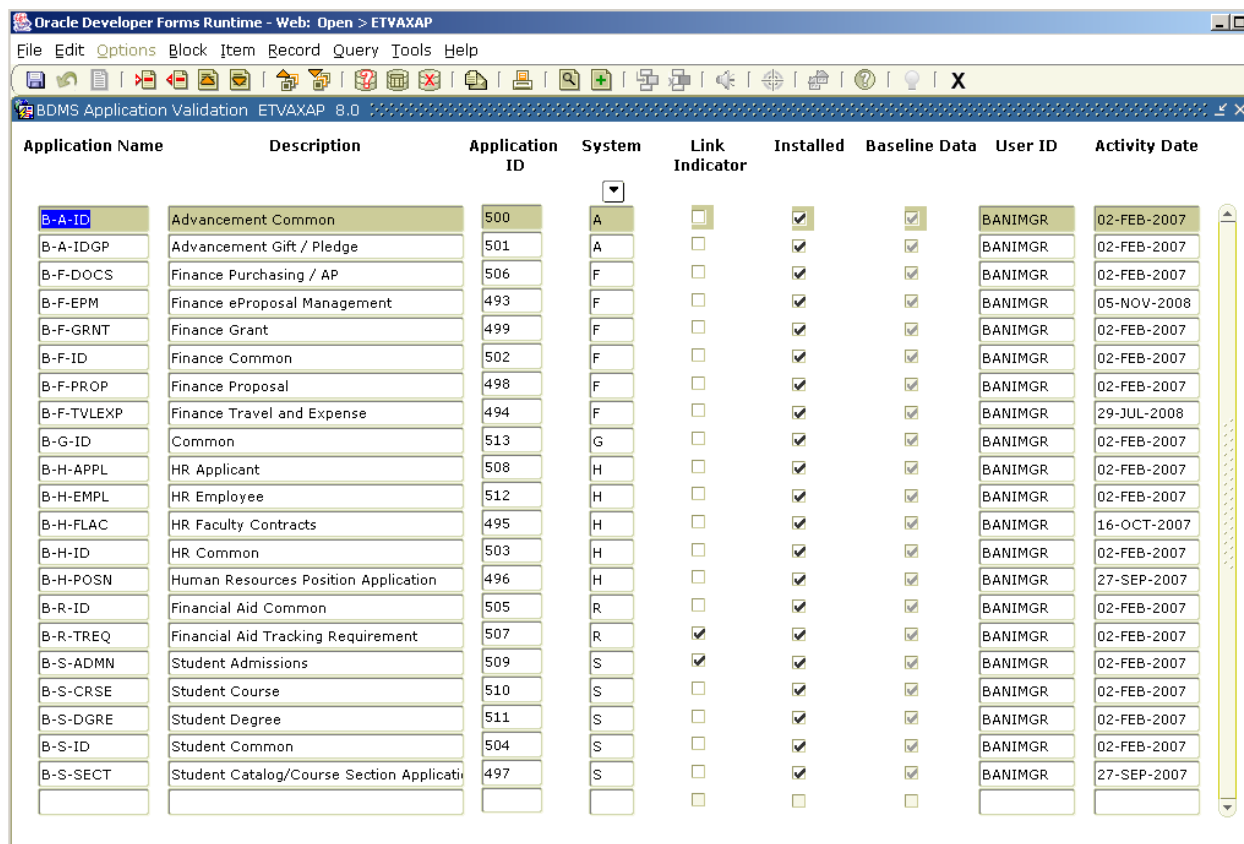
This section contains exercises that perform typical BDMS procedures.

Objectives

Exercise 1: View Existing BDMS Applications

Steps

1. Start a Banner session.
2. Access the Banner Document Management Suite Application Validation Form (ETVAXAP).



Application Name	Description	Application ID	System	Link Indicator	Installed	Baseline Data	User ID	Activity Date
B-A-ID	Advancement Common	500	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
B-A-IDGP	Advancement Gift / Pledge	501	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
B-F-DOCS	Finance Purchasing / AP	506	F	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
B-F-EPM	Finance eProposal Management	493	F	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	05-NOV-2008
B-F-GRNT	Finance Grant	499	F	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
B-F-ID	Finance Common	502	F	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
B-F-PROP	Finance Proposal	498	F	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
B-F-TVLEXP	Finance Travel and Expense	494	F	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	29-JUL-2008
B-G-ID	Common	513	G	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
B-H-APPL	HR Applicant	508	H	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
B-H-EMPL	HR Employee	512	H	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
B-H-FLAC	HR Faculty Contracts	495	H	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	16-OCT-2007
B-H-ID	HR Common	503	H	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
B-H-POSN	Human Resources Position Application	496	H	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	27-SEP-2007
B-R-ID	Financial Aid Common	505	R	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
B-R-TREQ	Financial Aid Tracking Requirement	507	R	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
B-S-ADMN	Student Admissions	509	S	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
B-S-CRSE	Student Course	510	S	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
B-S-DGRE	Student Degree	511	S	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
B-S-ID	Student Common	504	S	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
B-S-SECT	Student Catalog/Course Section Applicati	497	S	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANIMGR	27-SEP-2007

3. View and verify the list of applications created during BDMS installation.

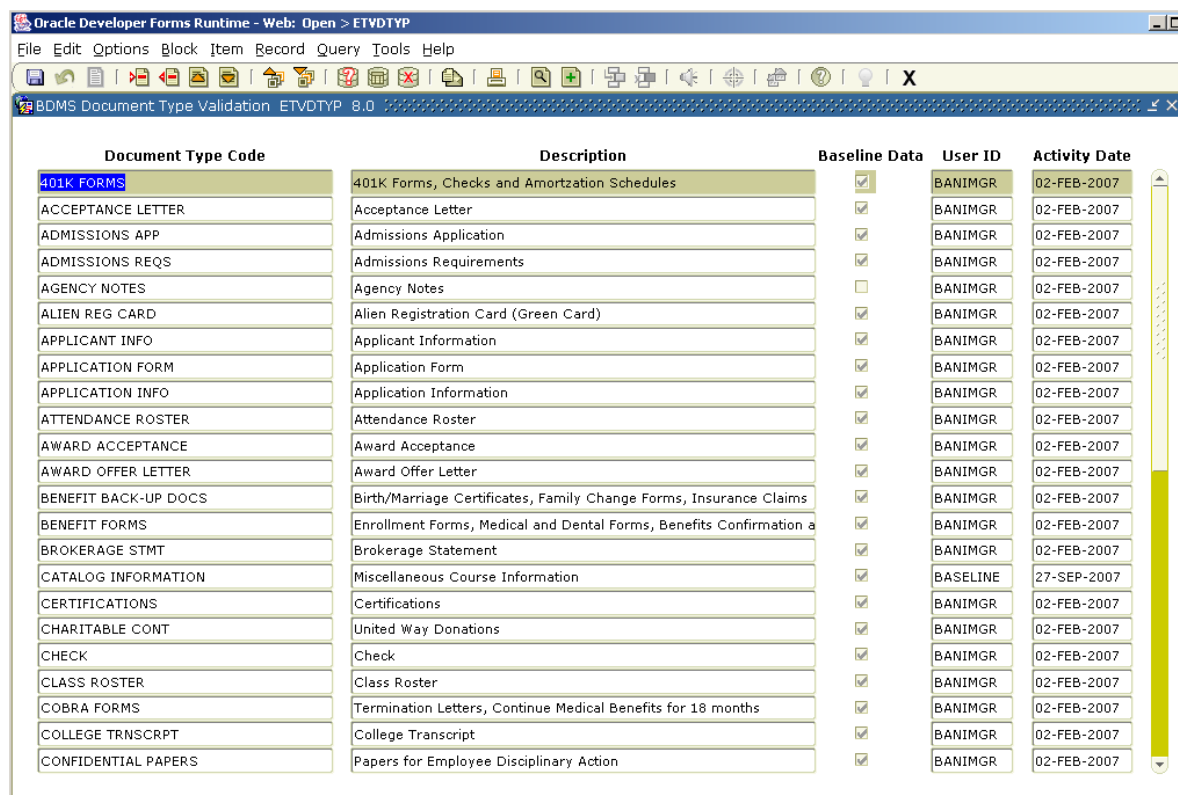
Note: There are 18 applications. Only Financial Aid Tracking and Student Admission Application are linked to ApplicationXtender.

4. Close the form by clicking on the EXIT icon on the toolbar.

Exercise 2: Create a New Document Type Code

Steps

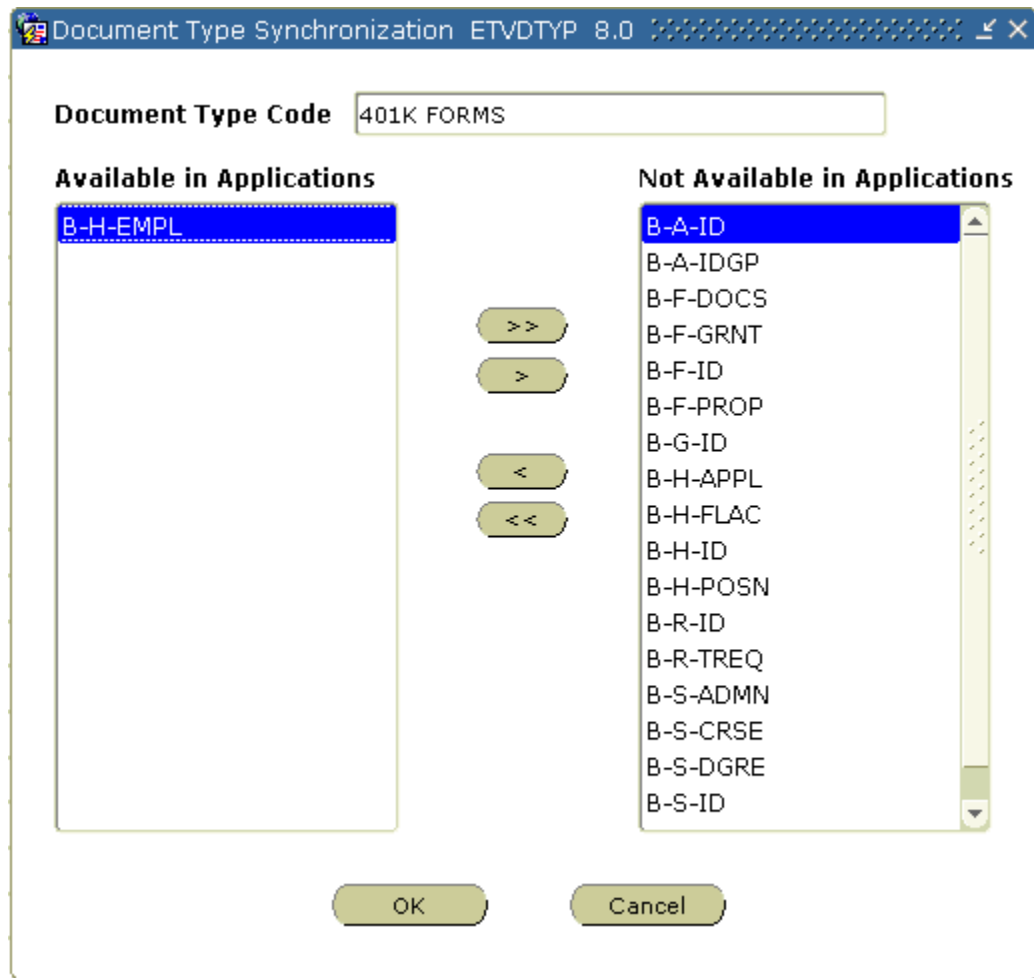
1. Start a Banner session.
2. Access the Banner Document Management Suite Document Type Validation Form (ETVDTYP).



Document Type Code	Description	Baseline Data	User ID	Activity Date
401K FORMS	401K Forms, Checks and Amortization Schedules	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
ACCEPTANCE LETTER	Acceptance Letter	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
ADMISSIONS APP	Admissions Application	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
ADMISSIONS REQS	Admissions Requirements	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
AGENCY NOTES	Agency Notes	<input type="checkbox"/>	BANIMGR	02-FEB-2007
ALIEN REG CARD	Alien Registration Card (Green Card)	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
APPLICANT INFO	Applicant Information	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
APPLICATION FORM	Application Form	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
APPLICATION INFO	Application Information	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
ATTENDANCE ROSTER	Attendance Roster	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
AWARD ACCEPTANCE	Award Acceptance	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
AWARD OFFER LETTER	Award Offer Letter	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
BENEFIT BACK-UP DOCS	Birth/Marriage Certificates, Family Change Forms, Insurance Claims	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
BENEFIT FORMS	Enrollment Forms, Medical and Dental Forms, Benefits Confirmation a	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
BROKERAGE STMT	Brokerage Statement	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
CATALOG INFORMATION	Miscellaneous Course Information	<input checked="" type="checkbox"/>	BASELINE	27-SEP-2007
CERTIFICATIONS	Certifications	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
CHARITABLE CONT	United Way Donations	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
CHECK	Check	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
CLASS ROSTER	Class Roster	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
COBRA FORMS	Termination Letters, Continue Medical Benefits for 18 months	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
COLLEGE TRNSCRPT	College Transcript	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007
CONFIDENTIAL PAPERS	Papers for Employee Disciplinary Action	<input checked="" type="checkbox"/>	BANIMGR	02-FEB-2007

3. View and verify the list of document types codes.
4. In the Menu Bar, select **Record** and **Insert** to insert a new row in the table.
5. Enter a new document type code and description. Select the **Sys Req** box for your new entry.
6. Save the changes.
7. Refresh the screen to verify the new code.

8. Perform a Next Block function to reveal the document type synchronization form.
9. Select the Application(s) in which this document type will be used.
10. Click <OK> to save the changes
11. Start a Banner session, and verify the new document type created above.



Exercise 3: Running Queries in BDMS

Steps

1. Open ApplicationXtender while you do not have a Banner session running.
2. In ApplicationXtender, add a new document to a known student ID using the *B-S-ID* application. (Use the [Tab] key, not the [Enter] key.)
3. Index the new document.
4. Run a query to verify that the document is in the right application.
5. Close ApplicationXtender.
6. Start a Banner session.
7. Navigate to the Identification Form (SPAIDEN).
8. Enter the student **ID** used in step 2.
9. Right-click the BDMS icon on the Banner toolbar.



A message should appear informing you that one document exists for this student ID.

10. Click the BDMS Query icon to invoke ApplicationXtender. AX should now display the document indexed in step 3.
11. Close ApplicationXtender.

Exercise 4: Create a New Context Rule (Form-Level Rule)

Steps

1. Start a Banner session.
2. Access the Banner Document Management Suite Context Determination Form (EXABCXT).
3. Enter the form name for which the rule is being created in the **Form Name** field. (e.g. SPAIDEN).
4. Perform a Next Block function.
5. Enter the application code in the **App Name** field. (e.g. B-S-ID).
6. Enter the **document type** for document type-specific queries. You may double-click the field or select it and press [F9] to call up a table of valid document types.

The screenshot displays the 'BDMS Context Determination EXABCXT 8.0' window. On the left, a tree view lists various forms such as AAAACKN (Dues Acknowledgement form), AAACMEM (Co-Member form), and AGAPPAUX (Pledge Auxiliary Amount form). The right side of the window is divided into two main sections: 'Form Context' and 'Context Search Criteria'. The 'Form Context' section includes fields for 'Form', 'Block', 'Item', and 'Item Value', along with 'Associated ApplicationXtender/WebXtender Settings' for 'Application Name', 'Saved Query', and 'Document Type'. The 'Context Search Criteria' section features two columns: 'Banner Item Field Name' and 'BDMS Index Field Name', each with five input fields for defining search parameters.

7. Save the context rule.
8. In the Banner Item Field Name column, enter the Banner item that supplies the parameter value that will be queried in ApplicationXtender.
9. In the Document Management Suite Index Field Name column, enter the ApplicationXtender field that will be queried.

Form Context

Form: ▼ Item:

Block: Item Value:

Associated ApplicationXtender/WebXtender Settings

Application Name: ▼ Saved Query:

Document Type: ▼

Context Search Criteria

Banner Item Field Name	XtenderSolutions Index Field Name
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Note: ID in the Banner Item fieldname is the same as ID in the Document Management Suite Index Fieldname. (Parameter changes to Context rule is a toggle switch)

10. Save the parameter rule.

Steps

Next, you will verify the context rule created above in Banner.

1. Start a Banner session.
2. Access SPAIDEN, and search for the ID used in previous exercises.
3. After entering the ID, launch BDMS.

This step should take you to the application where the new context rule was set up and display the document.

Exercise 5: Create a New Student Linking Rule

Steps

1. Start a Banner session.
2. Access the Banner Document Management Suite Banner Linking Rules Form (ESALINK).
3. Enter values for the **Document Type**, **Admissions Requirements (Request)**, **Rule Effective From** and **Rule Effective To** fields in the first blank line of the Student Block. To view and select from a table of valid entries for these fields, double-click them or press [F9].

Document Type	Request	Effective Term		Scope Modifier	Scope Term		Allow Checklist Requirement			Permit Feedback	
		From	To		From	To	Insert	Update	Undo	Insert	Update
ADMISSIONS APP	AP25			Normal			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
APPLICANT INFO	AGEP			Normal			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
APPLICATION INFO	BXST			Normal			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
COLLEGE TRNSCRPT	CLT1			Normal			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DRIVERS LICENSE	PICS			Normal			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EXAM SCORES	TSTS			Normal			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HIGH SCHOOL TRNSCRPT	HST1			Normal			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

4. Save the changes.
5. Set the Scope of the rule.
 - N=Normal – rule will apply to all checklists where the Term Code and App Number match those of the indexed document)
 - T=Term – rule will apply to all checklists where the Term Code matches that of the indexed document, regardless of the App Number
 - A=All – rule will apply to all checklists for the student regardless of the term or app number entered upon indexing.
6. Select the valid functions you would like to trigger upon indexing:
 - Insert – will insert a new checklist item on SARCHKL if it does not yet exist.
 - Update – will update existing checklist items to include a received date and a comment indicating who it was updated by
 - Undo – will remove the received date from a previously indexed checklist item if the document is “un-indexed” in AX or WX.
7. Select any desired notifications – will cause a message to display in AX upon indexing an item that triggers one of these updates.
8. Make sure the global rules have been set for Student Linking by selecting “System Settings” from the options menu.
9. Save your changes (F10).

Steps

Next, you will verify the linking rule created above in Banner.

1. Index a document in AX in the B-S-ADMN app for a Student using the appropriate document type, admissions requirement, term and app number. A confirmation message pop-up window should display.
2. Start a Banner session. Access the Admissions Application Form (SAAADMS).
3. Enter the student ID you have been working with, and perform Next Block functions to call up the Checklist Summary screen. Verify here that the document/data was received.

Exercise 6: View the System Errors

Steps

1. Start a Banner session.
2. Access the Banner Document Management Suite Error/Results Form (EXARSLT).

The screenshot displays the 'BDMS Error/Result EXARSLT 8.0' window. It contains five identical error message entries, each with the following fields:

Source Type	Error Location	Functional Type	User ID	Activity Date and Time
Package	EOKRFSY	Synchronization	TAEMGR	16-DEC-2008 17:23:40
Message: ***ERROR*** eokrfsy.p_spriden_aur (eokrfs1.sql) -1 ORA-00001: unique constraint (OTGMGR.AE_RFSCCT_0) violated.				

3. Review the error messages.
4. Enter a query for a **Functional Type**, and execute it.
5. Review the results.
6. Close the form.

Exercise 7: Attaching a Document to a Banner Record

Steps

1. Start a Banner session.
2. Access SAAADMS, and enter the ID you have been working with.
3. While still in the ID field, click on the **BDMS Add Document** icon on the toolbar.



4. Once in AX (or WX), a browser window will appear. Browse for the desired document to index.
5. The Index information will automatically populate based on the record selected in Banner.
6. Save and close the document, and return to Banner.
7. Click on the BDMS icon on the toolbar.

A query should call up all documents associated with the current ID.

8. Double-click on a document to view the document.

Exercise 8: Correcting Indexes

Steps

1. Start a Banner session.
2. Click on the BDMS icon on the toolbar.
3. Right-click on the Application, and select **New Query**.
4. Enter an incorrect ID.
5. Click on Search.
6. Display the incorrect image.
7. Select **Document, Export, Image** from the menu bar.
8. Select the place where you want to put the image on your desktop.
9. Name the image, click OK, and close it.
10. Select **Document , New, Import from file** from the menu bar.
11. Select the file that was just saved to disk.
12. Enter the correct index and save.
13. Execute a query on the new ID.
14. Right-click on the Application, and select **New Query**.
15. Enter the new ID and click on Search.
16. Select the new ID and display the associated document.

Steps

If the new document is correct, delete the incorrectly imaged document as follows:

1. Right-click on the Application, and select **New Query**.
2. Enter the incorrect ID, and click on Search.
3. Display the incorrect image.
4. Select **Document, Delete** from the menu bar. Click OK to delete the document.
5. Delete the incorrect document from your desktop.

Document Types



Introduction

This section lists the document type codes available in BDMS and Banner.

Objectives

Document Type Codes

Introduction

The integration of Banner documents with ApplicationXtender is accomplished using pre-established document types codes that are in each BDMS application. These codes are set up on the Banner Document Management Suite Document Type Validation Form (ETVDTYP).

The following list contains the document type codes and a description of each.

Document Type	Description
401K FORMS	401k Forms, Checks and Amortization Schedules
ACCEPTANCE LETTER	Acceptance Letter
ADMISSIONS APP	Admissions Application
ADMISSIONS REQS	Admissions Requirements
ALIEN REG CARD	Alien Registration Card (Green Card)
APPLICANT INFO	Applicant Information
APPLICATION FORM	Application Form
APPLICATION INFO	Application Information
ATTENDANCE ROSTER	Attendance Roster
AWARD ACCEPTANCE	Award Acceptance
AWARD OFFER LETTER	Award Offer Letter
BENEFIT BACK-UP DOCS	Birth/Marriage Certificates, Family Change Forms, Insurance Claims
BENEFIT FORMS	Enrollment Forms, Medical and Dental Forms, Benefits Confirmations and Statements
BROKERAGE STMT	Brokerage Statement
CERTIFICATIONS	Certifications
CHARITABLE CONT	United Way Donations
CHECK	Check
CLASS ROSTER	Class Roster
COBRA FORMS	Termination Letters, Continue Medical Benefits for 18 Months
COLLEGE TRNSCRPT	College Transcript

Document Type	Description
CONFIDENTIAL PAPERS	Payers for Employee Disciplinary Action
CONTACT FORM	Contact Form
CONTRACT INFO	Contract Information
COURSE SUMMARY	Course Summary
CURRENT VISA INFO	Current Visa Information
DEATH CERTIFICATE	Death Certificate
DEATH NOTICE	Death Notice Documentation
DEGREE INFO	Degree Information
DIPLOMA INFO	Diploma Information
DIRECT CASH RECEIPT	Direct Cash Receipt Form
DRIVERS LICENSE	Copy of Drivers License
EDUCATIONAL TRNSCRPT	Educational Transcript
ELECTRONIC LOAN APPL	Electronic Loan Application
EMAIL	E-mail Document
EMPLOYEE INFO FORM	Employee Information Forms, Employee Recs
EMPLOYEE REVIEW FORMS	Employee Review Forms
EMPLOYMENT AUTH FORMS	Employment Authorization Forms
ENCUMBRANCES	Encumbrances
ENROLL VERIFICATION	Enrollment Verification Form
ENTRY VISA INFO	Entry Visa Information
EXAM SCORES	Examination Scores
EXECUTIVE BENEFITS	Executive Benefits
FACULTY COURSE LOAD	Faculty Course Load
FEDERAL TAX RETURN	Federal Tax Return

Document Type	Description
FLEXIBLE ACCOUNT FORMS	Flexible Spending Accounts/Forms
FMLA	Family Medical Leave Act
FY COMMISSION PLANS	Commission Plans and Analysis
GIFT	Gift
GIFT CHECK	Copy of Gift Check
GIFT STOCK CERT	Gift Stock Certificate
HIGH SCHOOL TRNSCRPT	High School Transcript
HOLD INFO	Hold Information
I-9 FORM	I-9 Form
I-94 FORM	I-94 Form
IMMIGRATION DOCS	Immigration Forms, Visa Agreement Forms, Extension of Visa Forms
INTERNATIONAL DOCS	International Documentation
INVOICE	Invoice
INVOICE PAYMENT	Invoice Payment
JOURNAL VOUCHER	Journal Voucher
LEAVE OF ABSENCE	Maternity Leave, Short Term Disability, Doctors Letters/Evaluations
LIFE INSURANCE	Voluntary Life Insurance Forms
LOAN DISBURSEMENT	Loan Disbursement Form
LONG TERM CARE FORMS	Long Term Care Forms
LONG TERM DISABILITY	Long Term Disability Forms
MAILINGS	Mailings – Annual Report, Event Flyers, Letters, etc.
MANUAL LOAN APPL	Manual Loan Application
MEDICAL DOCS	Medical Documents
MEDICAL INS	Medical Insurance

Document Type	Description
MISC BENEFIT FORMS	Miscellaneous Benefit Forms
MISC EMPLOYEE DOCS	Direct Deposit Forms, Time Reports, Employee Referrals, Employment Authorization and Other Docs
NAME/ADDRESS CHANGE	Name and Address Change Forms
NEW HIRE DOCS	Offer Letters, Confidential Agreements, Resume
OFFER LETTER	Offer Letter
PASSPORT	Passport Information
PC LOANS	Promissory Notes, Receipts from PC Purchase, Loan Amortization Schedules
PERFORMANCE LETTERS	Awards, Peer Counselor Letters, Employees Performance Skills Letters
PHOTO-CHILD	Photograph of Child
PHOTO-CONSTITUENT	Photograph of Constituent
PHOTO-SPOUSE	Photograph of Spouse
PLEDGE	Pledge
PLEDGE PAYMENT	Pledge Payment
PROMISSORY NOTE	Promissory Note
PROOF OF CITIZENSHIP	Proof of Citizenship
PROPOSAL FORM	Proposal Form
PRSPCT RESEARCH DOC	Prospect Research Document
PUBLICATIONS	Publications
PURCHASE ORDER	Purchase Order
RECRUITMENT INFO CARD	Recruitment Information Card
REGISTRATION INFO	Registration Information
RELOCATION FORMS	Relocation Agreements, E-mails, Relocation Analysis
REQUISITION	Requisitions
RESUME/CV	Resume or Curriculum Vitae

Document Type	Description
SALARY AND JOB INFO	Salary Adjustment Forms, Job Detail Info., Misc. Job Info., Payroll Action Forms, Bonuses
SSN CARD	Social Security Card
STOCK FORMS	Stock Purchase Forms
SUPPLEMENTAL INFO	Supplemental Information
TAX FORMS	Federal Tax Forms, W4
TERMINATION FORMS	Termination Forms, Letter of Resignation
TEST SCORES INFO	Test Score Information
TIME OFF DOCS	Time Off Documents – Vacation, Sick, Holiday
TRACKING REQUIREMENT	Tracking Requirement
TRANSCRIPT INFO	Transcript Information
VACATION FORM	Vacation Requests, Vacation Rollover Forms
VETERAN CARD	Veteran Information Card
WITHDRAWAL FORM	Withdrawal Form
WITHDRAWAL QUERY	Withdrawal Query Form
WORKERS COMP	Workers Compensation