BDMS (aka Xtender) Training

Prepared by: Edgar Coronel

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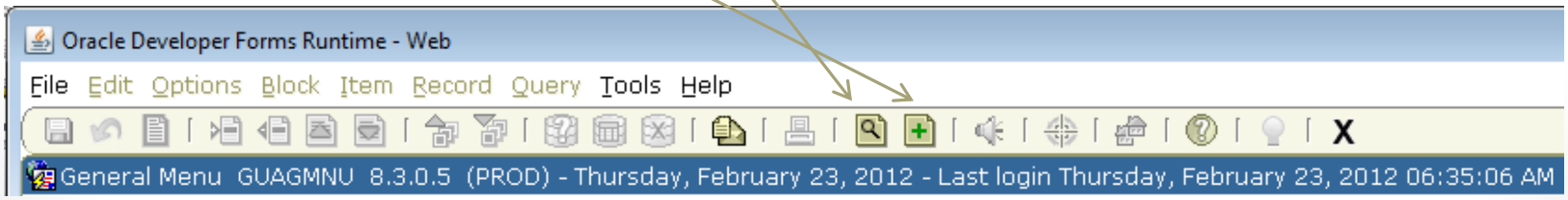
Overview of BDMS

- BDMS is an imaging and electronic document management system
- The BDMS product represents the integration of Banner with EMC Documentum's Document Management products, AppXtender and AppXtender Web Access.
- BDMS allows you to:
  - Query for specific images or documents from within a Banner form.
  - Limit the scope of the query based on document type, and where desirable, to Banner Form level, block level, item level, or value level.
  - Email the images/documents to another user for review.
  - Annotate the images.
  - Update Banner data based on the receipt of the appropriate documentation.
- In addition, AppXtender and AppXtender Web Access can be used stand-alone, outside the Banner environment, as a repository for documents unrelated to Banner data.

BDMS Functionality

- Two BDMS toolbar icons are available on the Banner toolbar as part of the Banner General release.
  - The BDMS - Display Document icon allows you to either initiate document retrieval via AppXtender or AppXtender Web Access from within Banner.
  - The BDMS - Add Document icon enables the creation of a new document from Banner.



BDMS Terminology

- **Annotation** – A markup, typically a note or highlight applied to an image to focus attention on a particular part of the page.
- **Auto Index System** - The Auto Index System is a look-up feature that contains examples of repeating Banner data related to a common ID.
- **Banner Document Management Suite (BDMS)** – Combination of the AppXtender/AppXtender Web Access product with all the Banner-based software that integrates the two products into a functional model where Banner can drive AppXtender.
- **BDMS Application** – Index-driven data storage structure where documents can be stored and retrieved.
- **BDMS - Display Document icon** – Icon on the Banner toolbar which, when clicked, opens the AppXtender or AppXtender Web Access product so a query can be performed.
- **BDMS - Add Document icon** - Icon on the Banner toolbar which, when clicked, opens the AppXtender or AppXtender Web Access product to allow for the creation of a new AX document from the data displayed in Banner.
- **Context** – Actual cursor location within a Banner form where you are when you click the BDMS icon to access the AppXtender system and create a query.

BDMS Terminology

- **Data Reference Field** - A data reference field provides data that is derived from a single Key Reference field. For example, Last Name is derived from ID.
- **Data Source** - Contains connection information that enables an application to connect to and receive data from a particular database.
- **Document** – File or group of files stored in an application and identified by a 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.
- **EMC Documentum** – The SunGard Higher Education partner for this integrated enterprise solution.
- **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.

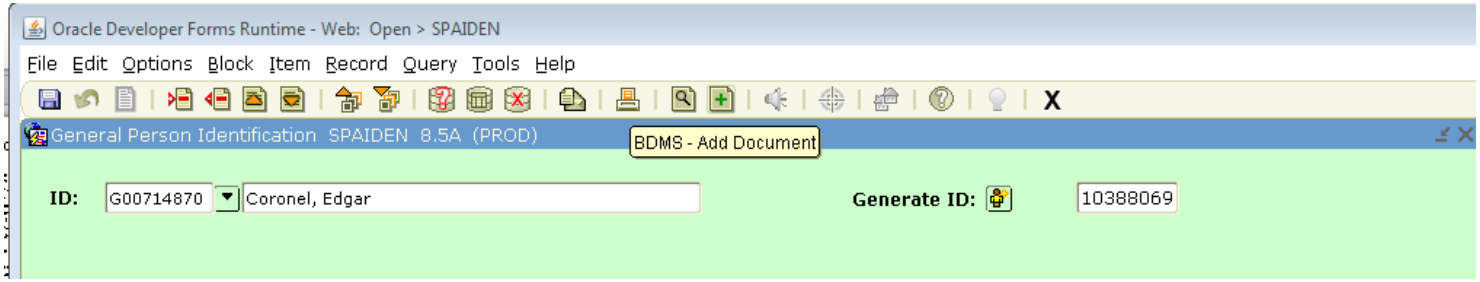
Login

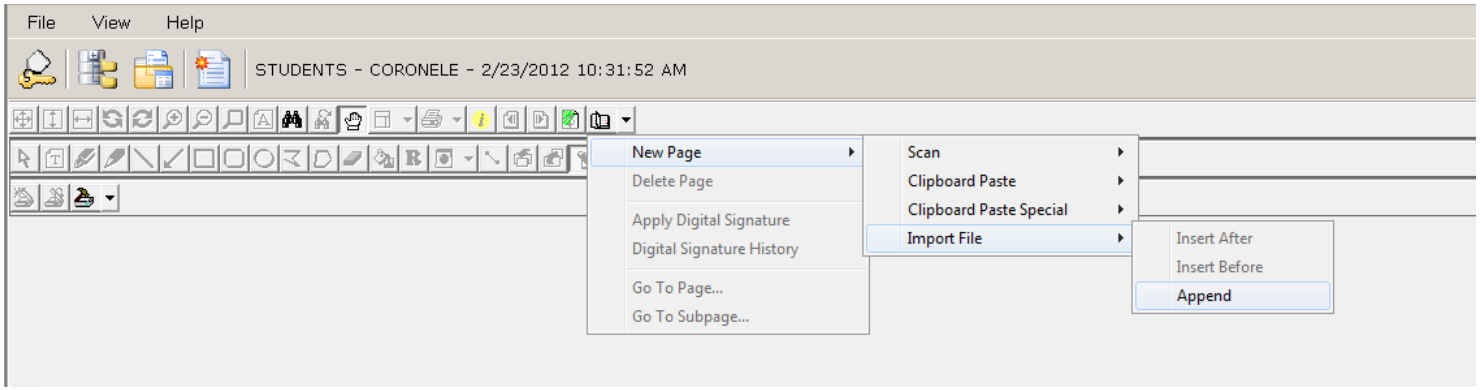
- AppXtender Standalone
- AppXtender Web Access Standalone
- Accessing BDMS from Banner

Create and Index Documents

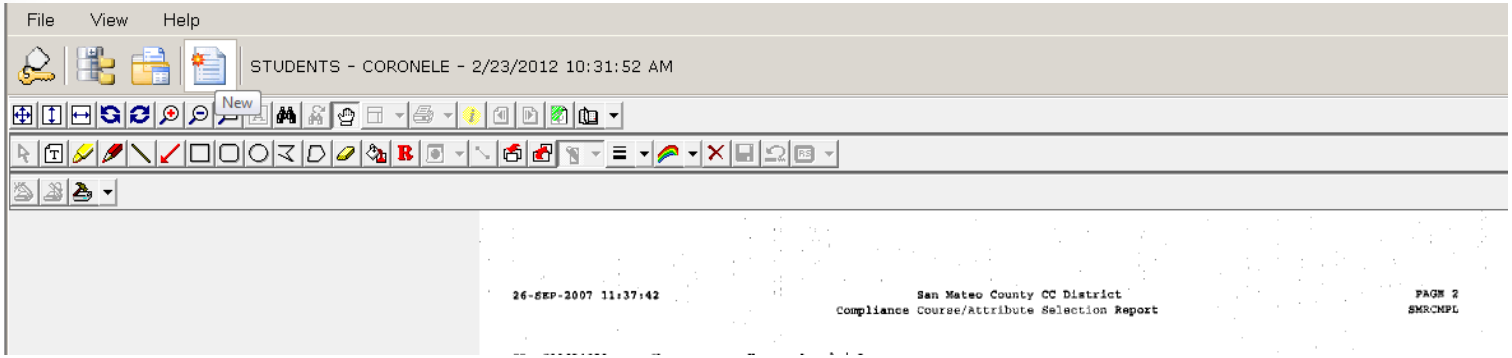
- Banner Document Management Suite (BDMS) allows you to store and organize many types of information as documents in your AppXtender (AX) system.
- AX documents are organized in applications for easy retrieval in the AppXtender file system.
- Each document is saved in AX with an index that is used to search for the document from an Internet Native Banner form or using direct access via AppXtender Document Manager (also known as Desktop) or AppXtender Web Access.
- A variety of input methods are available for you to add documents and pages. AX allows you to add pages and page versions to documents after they have been created.
- Documents may be added to the system via a scanner, or through import of a file or object.

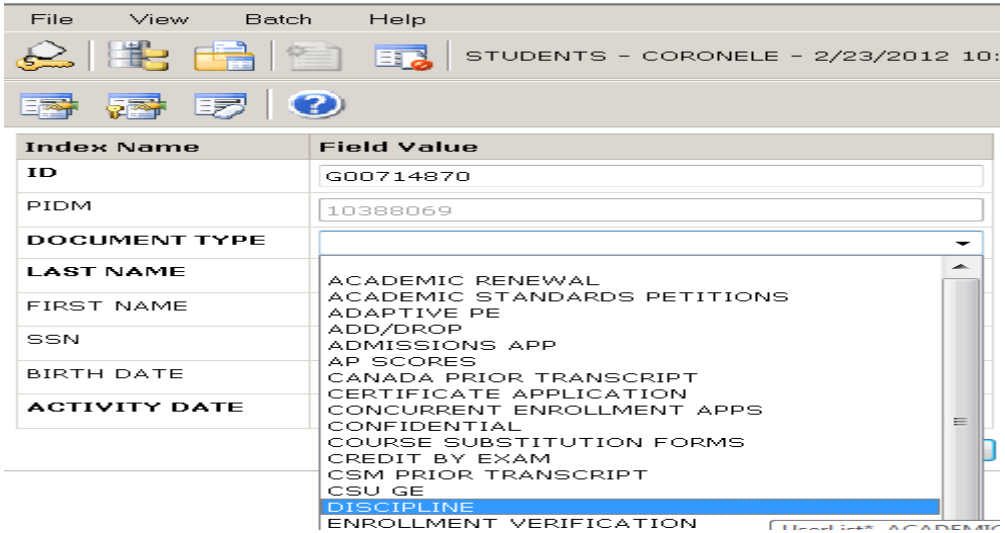
Create a New Document from within Banner



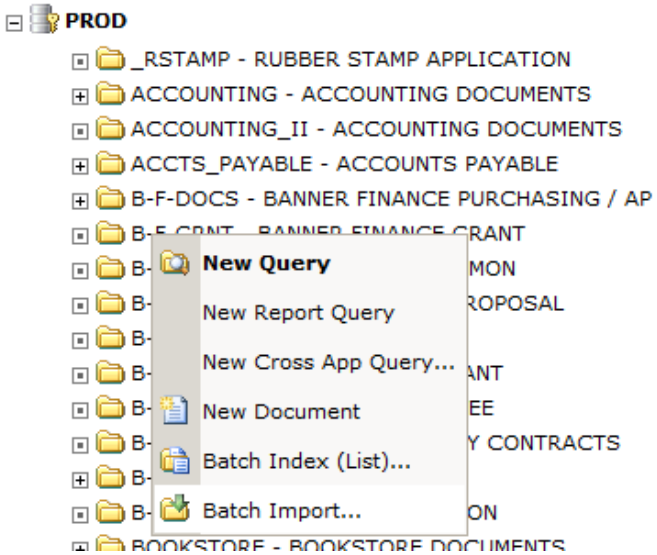


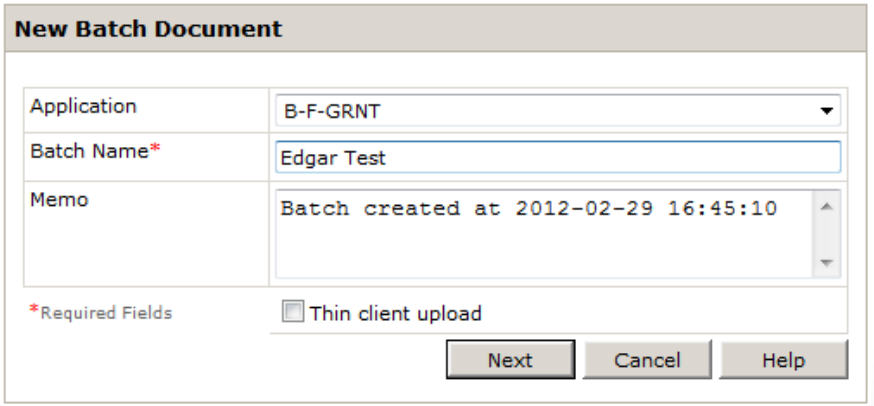
Create a New Document from within Banner



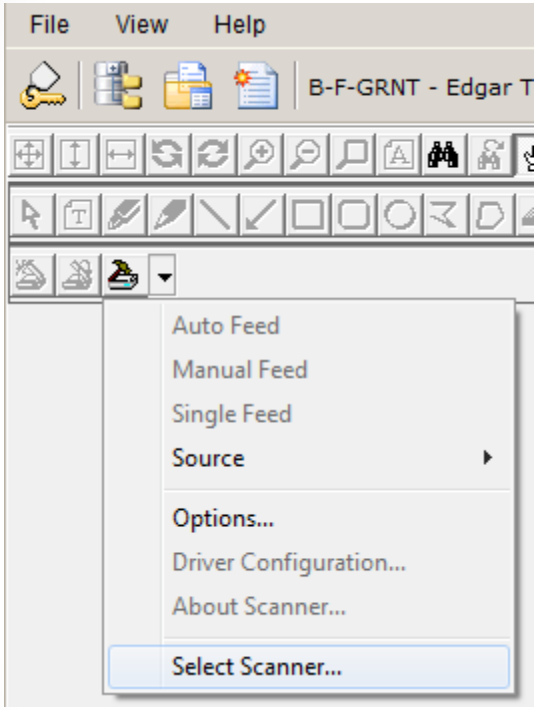


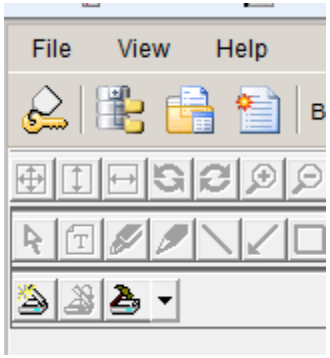
Scan a Document in AppXtender Web Access

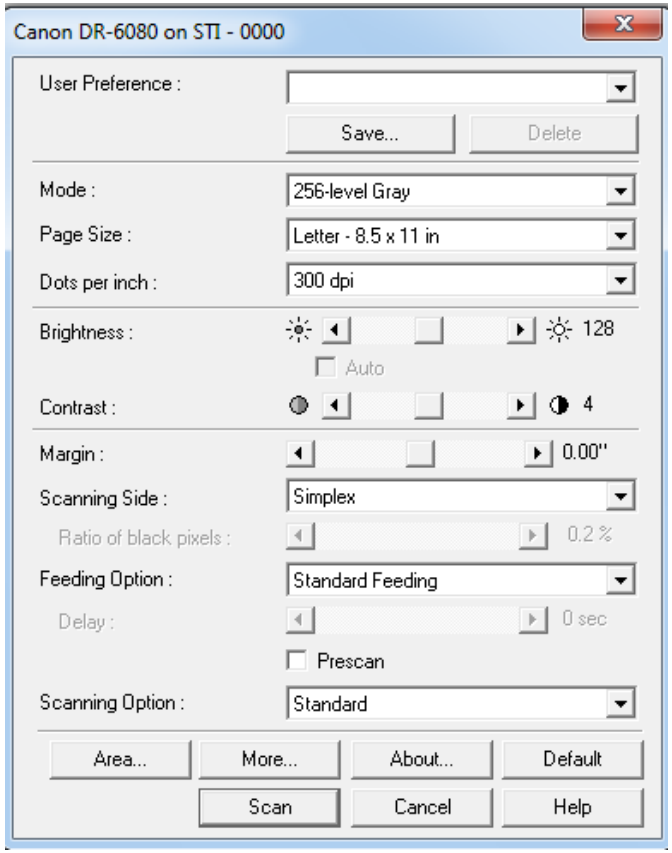




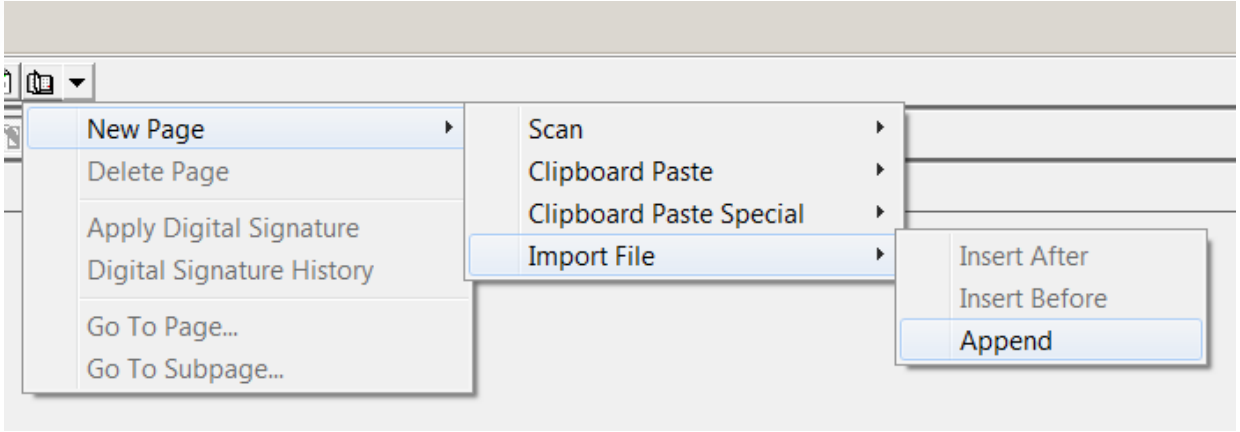
Scan a Document in AppXtender Web Access

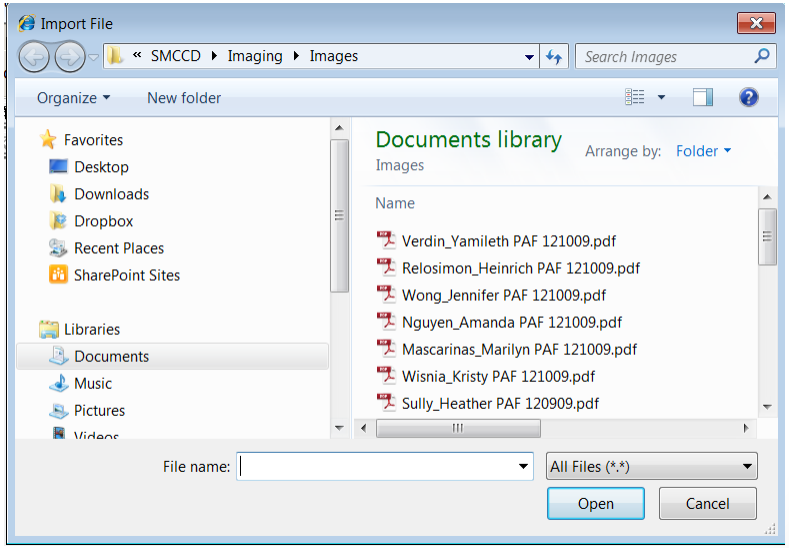




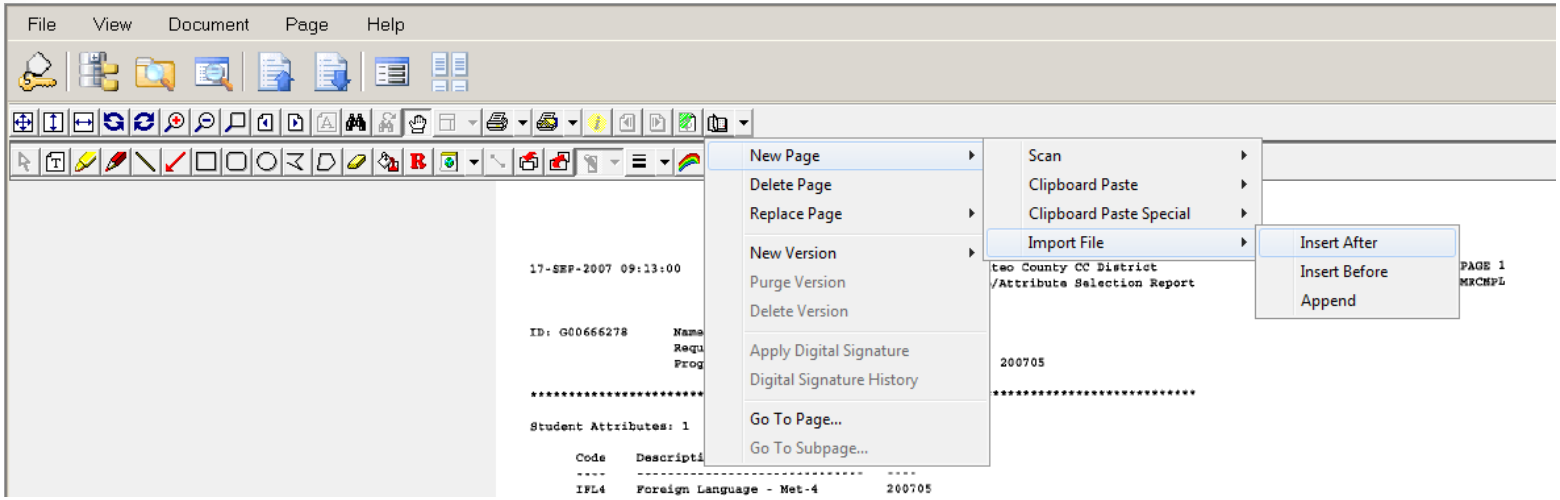


Import a Document in AppXtender Web Access

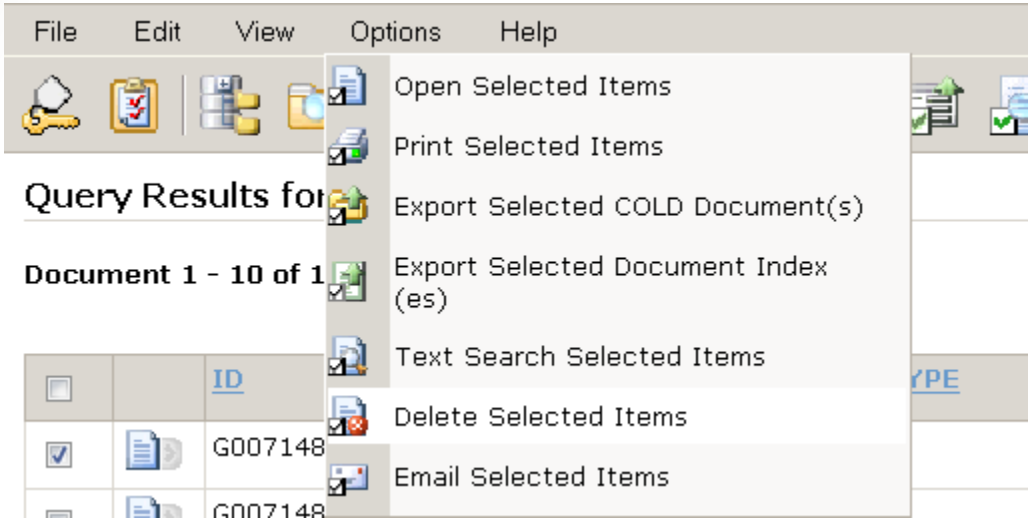


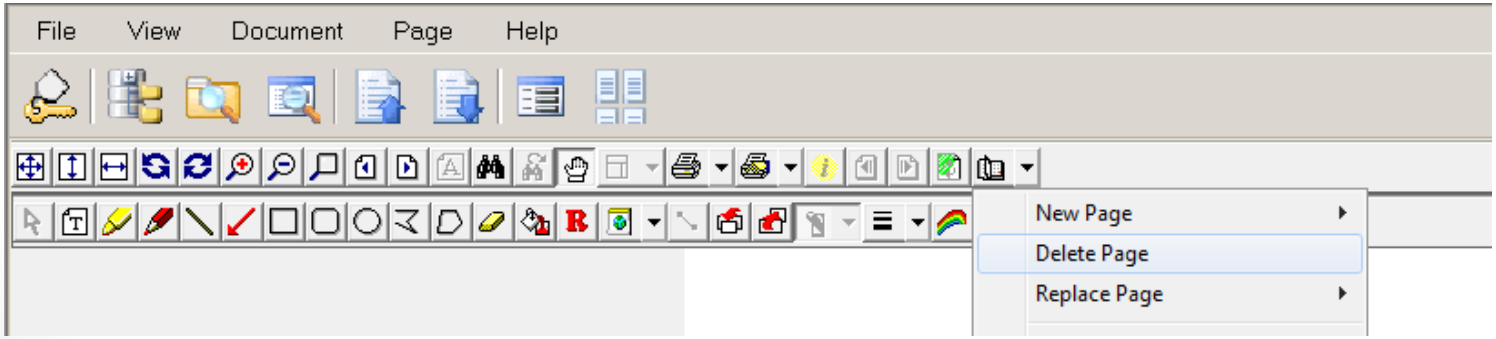


Add a New Page to an Existing Document



Remove Documents

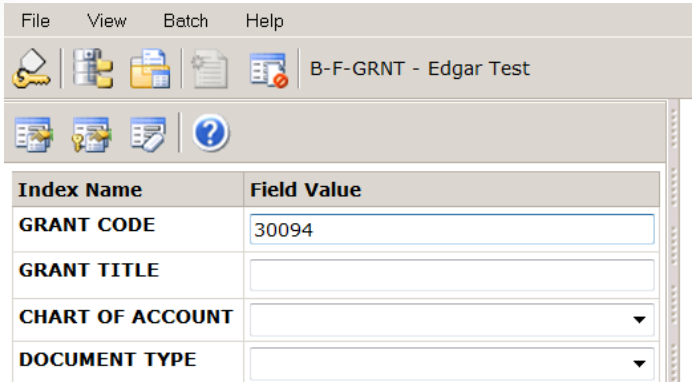




Index Documents

- The index of a document allows for quick and easy retrieval of the document.
- The more detailed and specific the index the easier it is to retrieve in a large system.
- An index should contain all or many criteria by which someone might try to search for the document.
- There are several indexing aids available to help you enter all this information. The most commonly used of these aids is the Key Reference system.
- The Key Reference system is available on most applications delivered with BDMS.
- Another method is the Auto Index system.

Indexing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B-F-GRNT - Edgar Test
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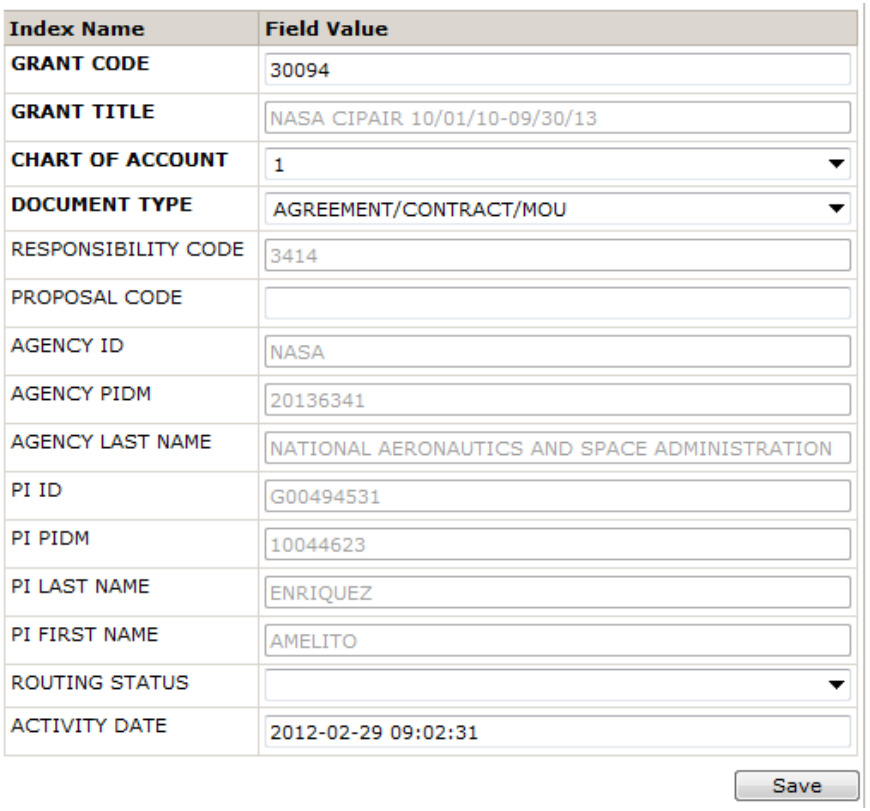
GRANT TITLE
CHART OF ACCOUNT
DOCUMENT TYPE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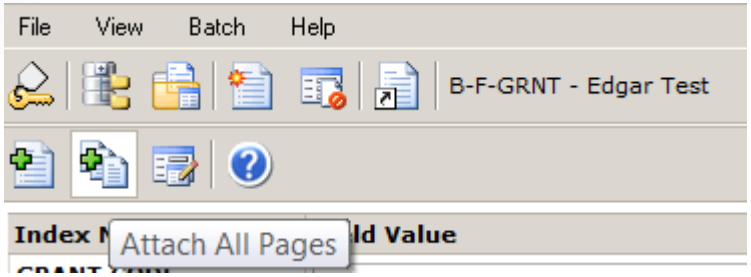
Indexing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B-F-GRNT - Edgar Test
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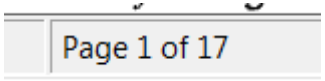
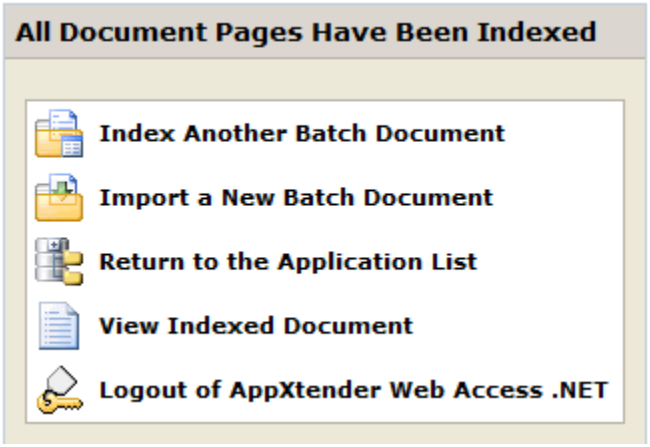
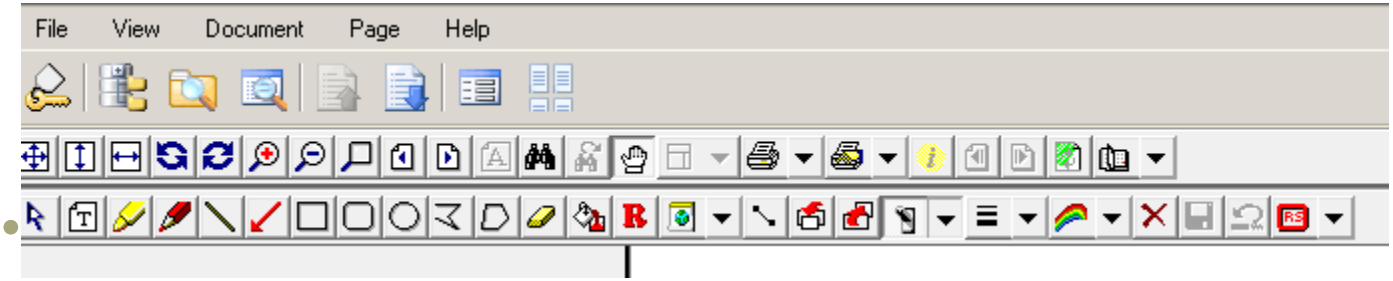
Value


Page 1 of 17


All Document Pages Have Been Indexed
Index Another Batch Document
Import a New Batch Document
Return to the Application List
View Indexed Document
Logout of AppXtender Web Access .NET

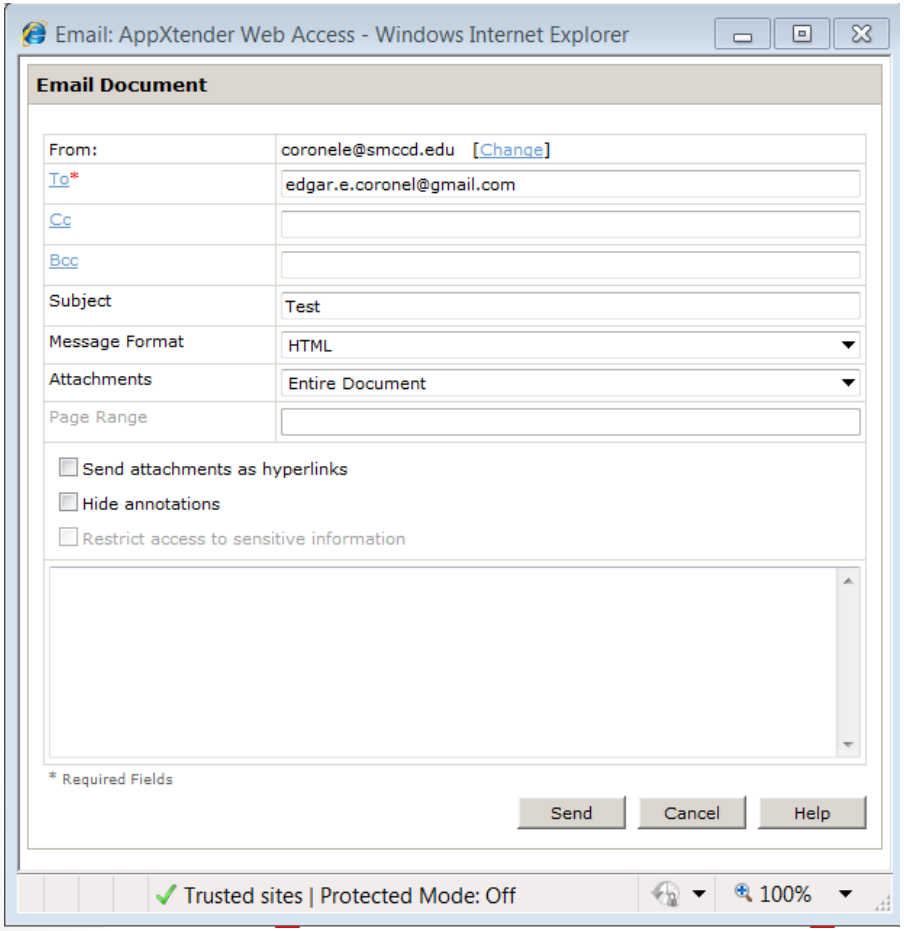
Working with Xtender Documents

- Thumbnail view

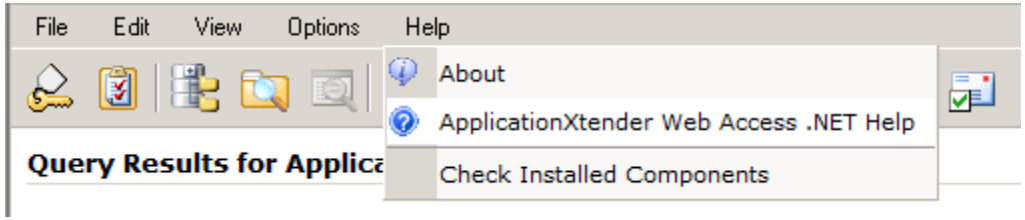


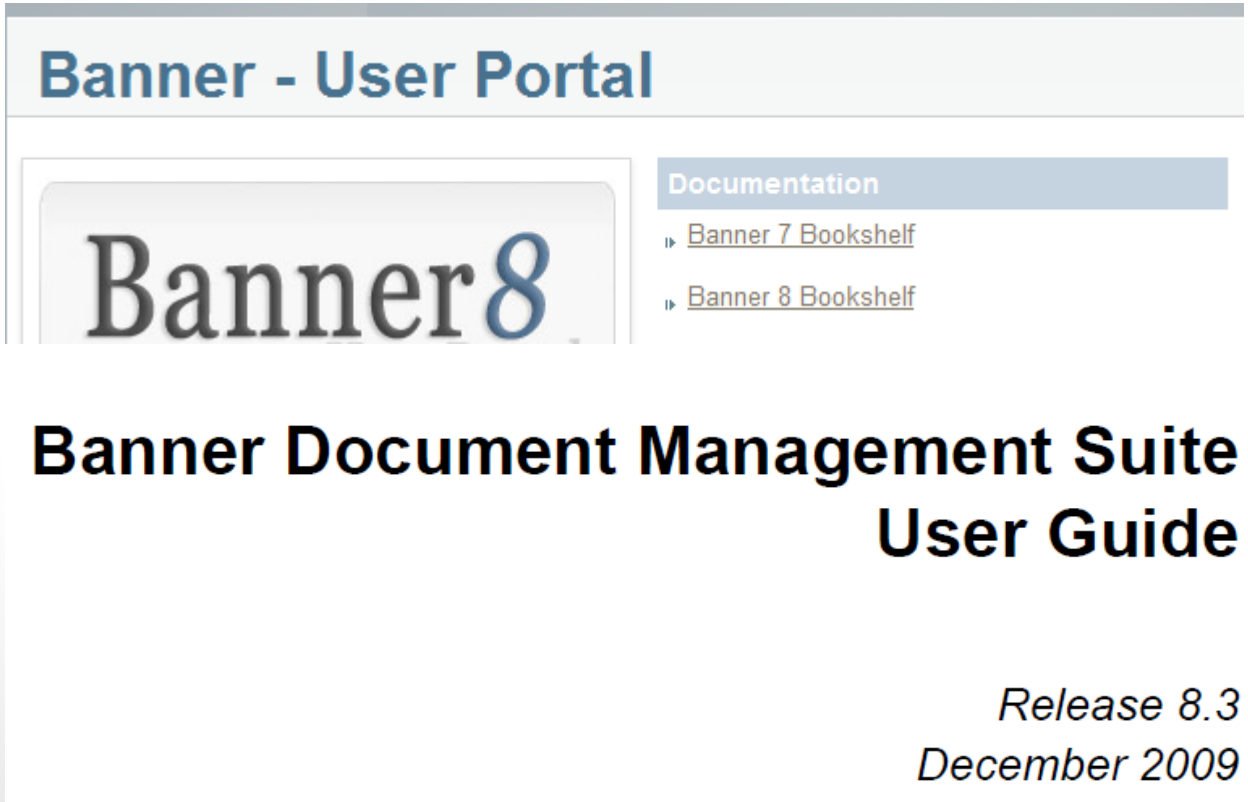
- Email document

Email document



Documentation (Installed Components)





- Questions?