ellucian®

Banner Document Management

Scanning & Indexing in Web Access

March 07, 2018

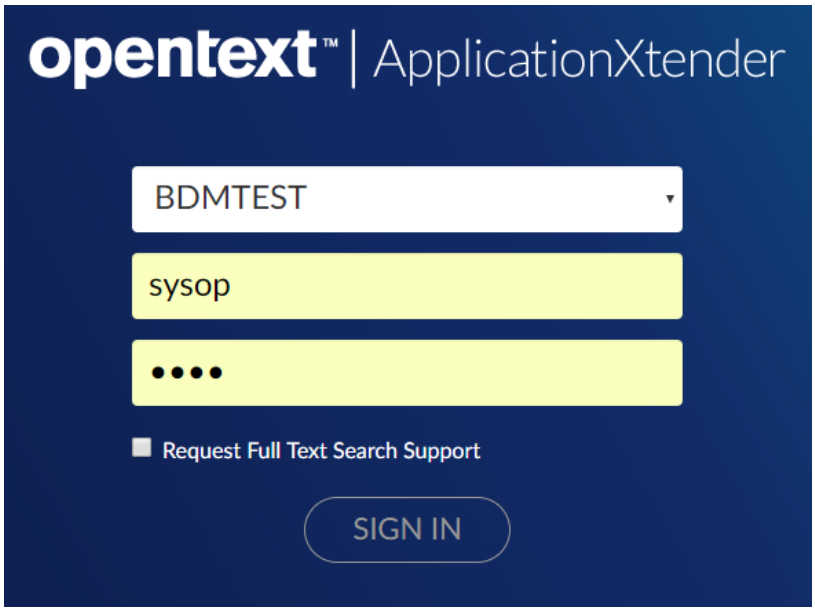
ellucian.

Table of Contents

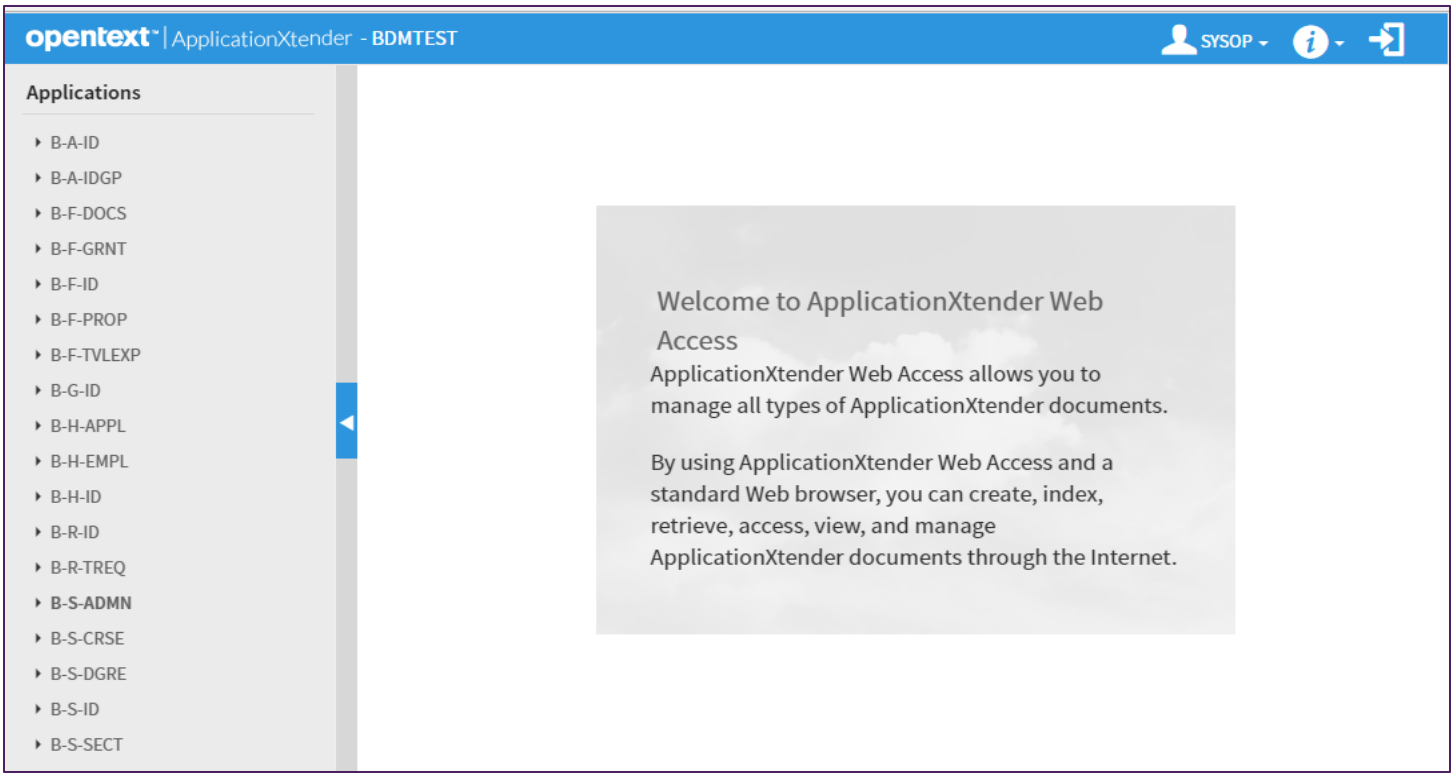
LOG INTO BDM	3
SCAN & INDEX A DOCUMENT	4
SCAN A BATCH	5
INDEX A BATCH	6
WHEN TO USE THE MODIFY BUTTON	7
IMPORTANT INDEX RULES	8
DUPLICATES & INDEXING BY LAST NAME ,FIRST NAME, SSN OR DOB	9
COPY OR MOVE A DOCUMENT	11
QUERY IN WEB ACCESS	15
CREATING A RANGE SEARCH	17
CREATING A LIST SEARCH	18
CREATING A SAVED QUERY	19
ICON DESCRIPTION	21
HOT KEYS	24

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

Log into Banner Document Management (BDM) Web Access

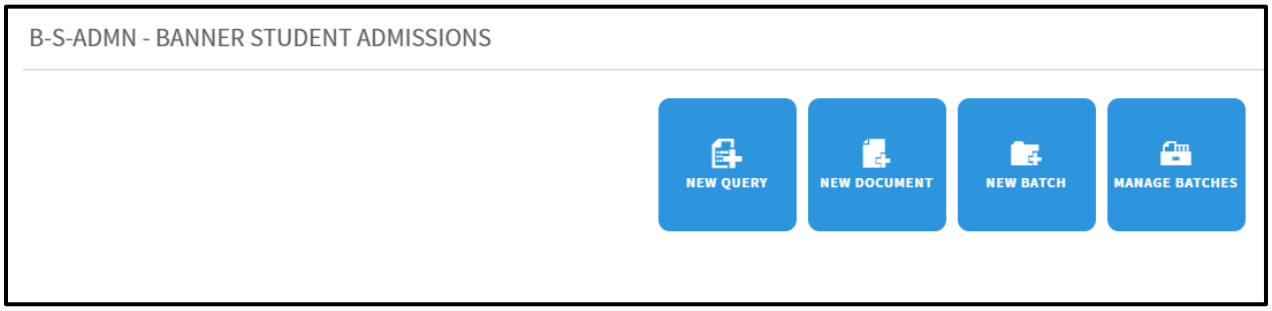


Enter your name and password



You will see the welcome screen and a list of applications on the left side of screen that you have access too.

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |



Select the application that you want to work with and select one of the function boxes.

New Query - Opens the document search window

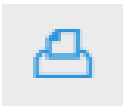
New Document – Scan or import documents and index to one value

New Batch – Scan or import documents into a batch and each page Individually

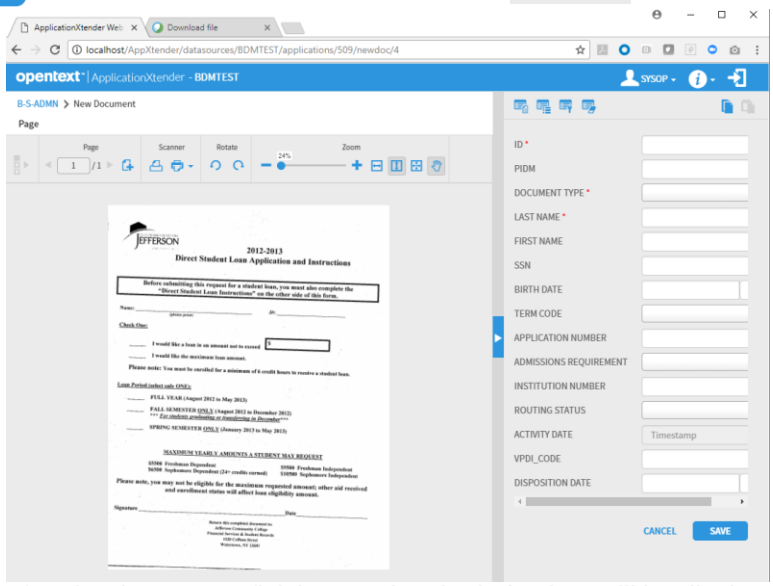
Manage Batches – Opens list of batches that need to be indexed

SCAN & INDEX a DOCUMENT

Select New Document



Click on the Scan icon

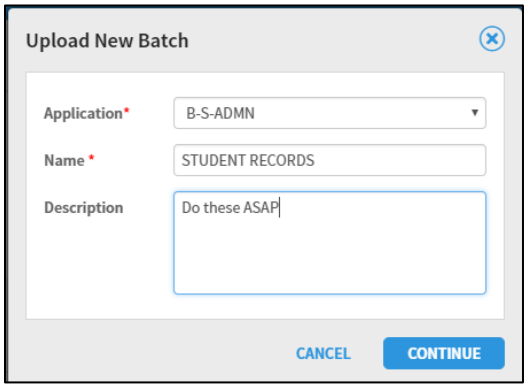


After the documents finish scanning the index box will be displayed.
All the scanned documents will be indexed to this information.

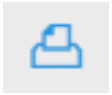
© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

SCANNING A BATCH

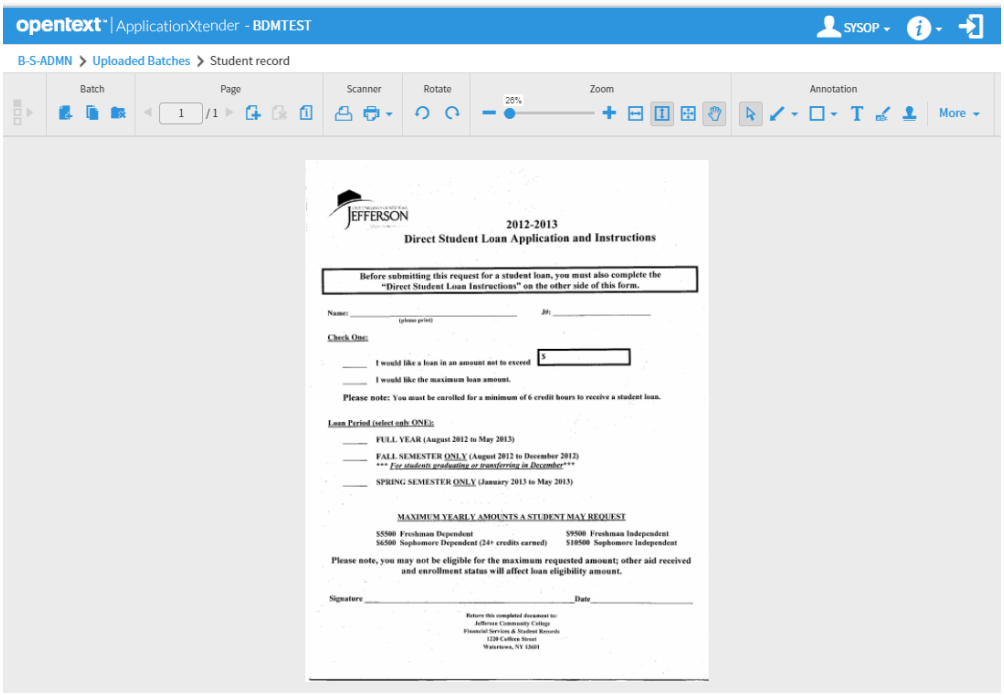
Select New Batch



1. Select the application that you want to scan into.
2. Enter the batch name
3. Optional – Enter a note or description

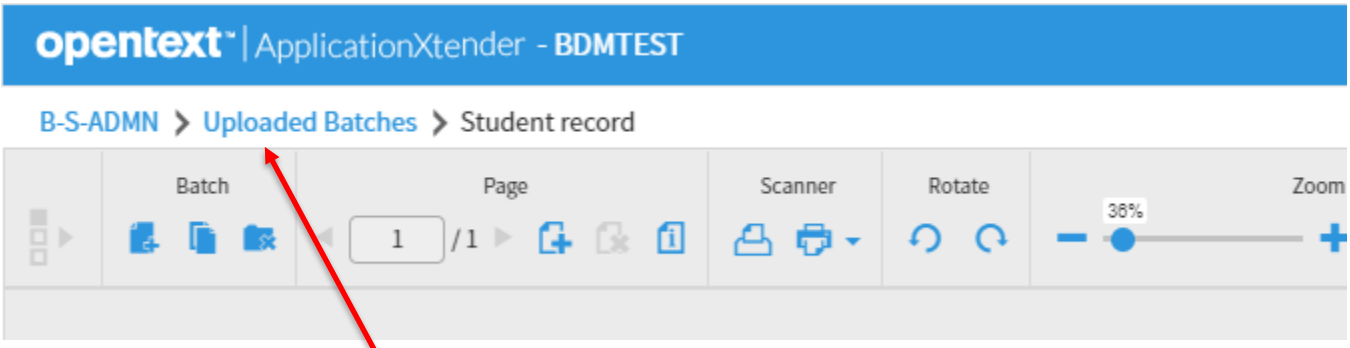


Click on the scan icon

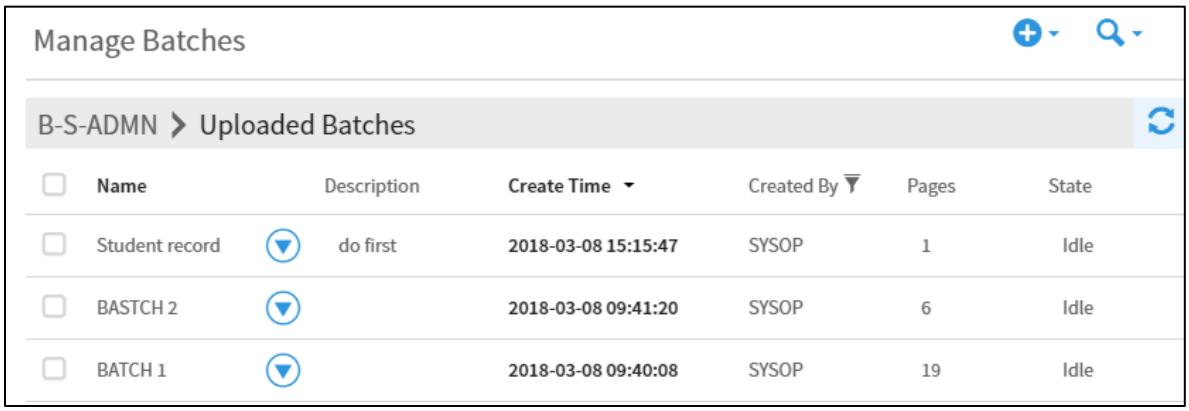


The documents will scan and display in Banner Document Management

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

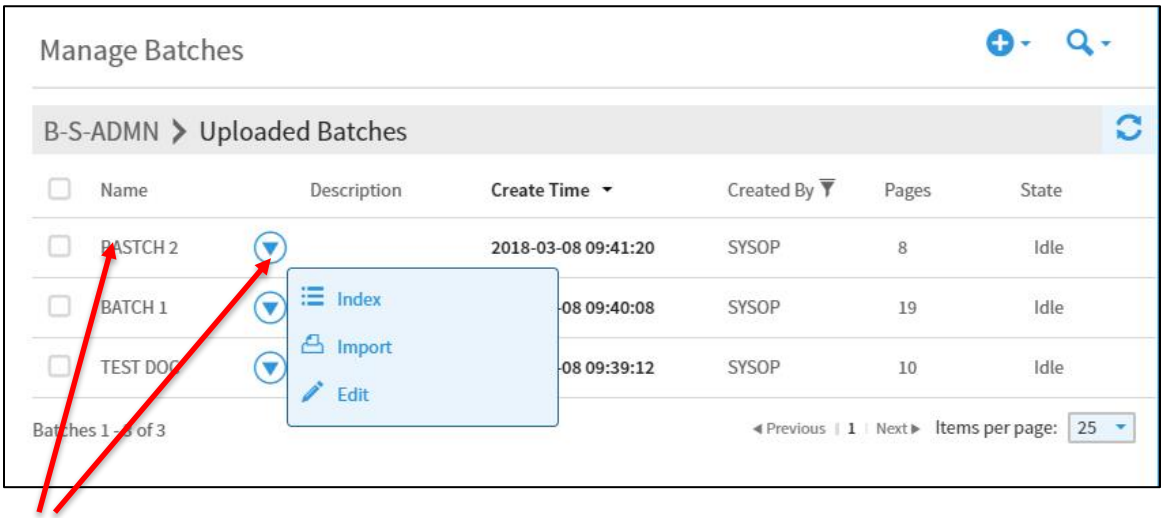


Click on Upload batches to see the batch list



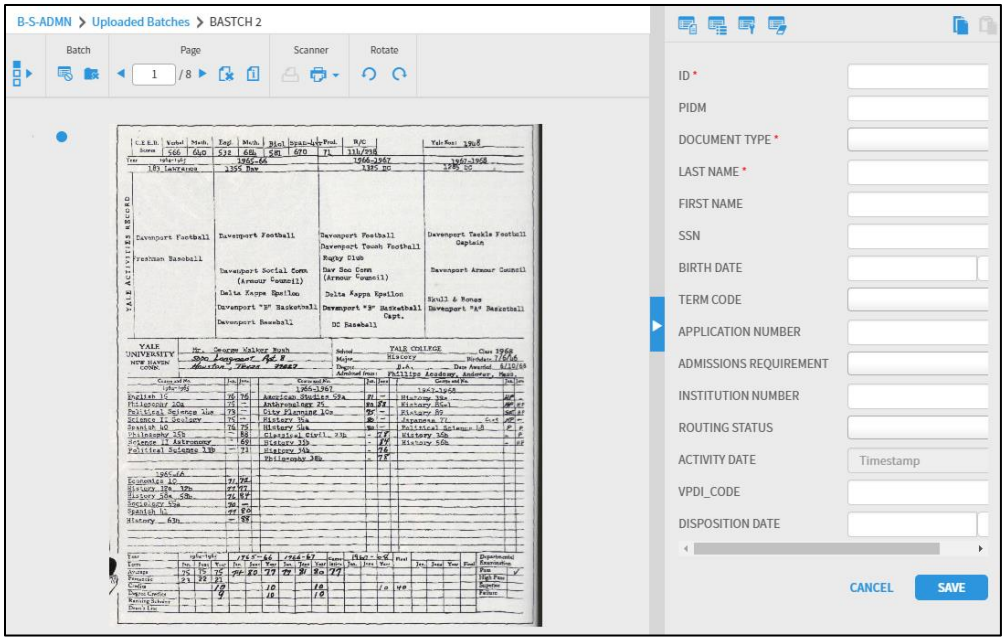
INDEXING A BATCH OF DOCUMENTS

Select Manage Batches to index documents



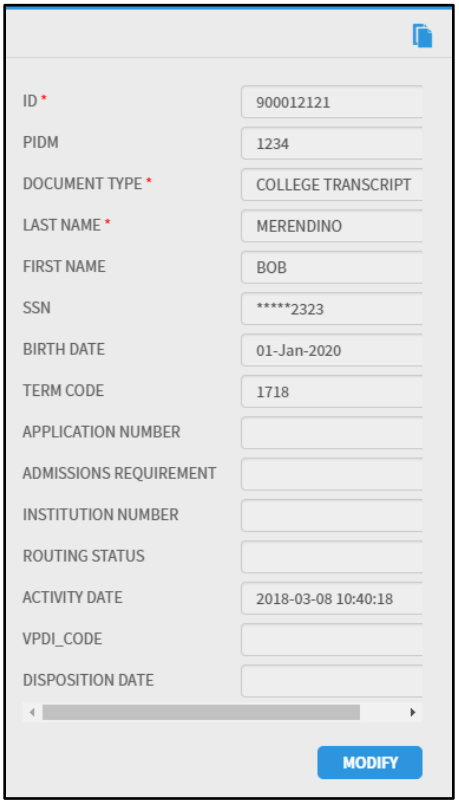
© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

Double click on the batch name or select the blue arrow and click on Index.



The document and index screen will appear. Enter the Banner ID into the ID field and the PIDM, LAST NAME, FIRST NAME, SSN, and BIRTH DATE will auto populate.

You will have to select the *Document Type* from the drop-down list and when you click on save the *ACTIVITY DATE* will populate with today's date. All other fields are optional.



Note: Do not use the Modify button during indexing

"Modify is for mistakes"

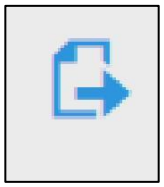
If you come across a document that has been indexed incorrectly or the data needs to be changed then you click on modify and make the change.

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

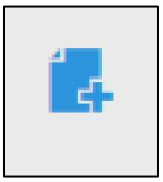
IMPORTANT INDEXING RULES

* **THREE IMPORTANT RULES ***

1. **If the document is the second page of the previous document, click on the single page blue arrow.**



2. **If the document belongs to the same Banner ID # as the previous document, but the Document Type is different then click on the "Create Another Document"**



Then:

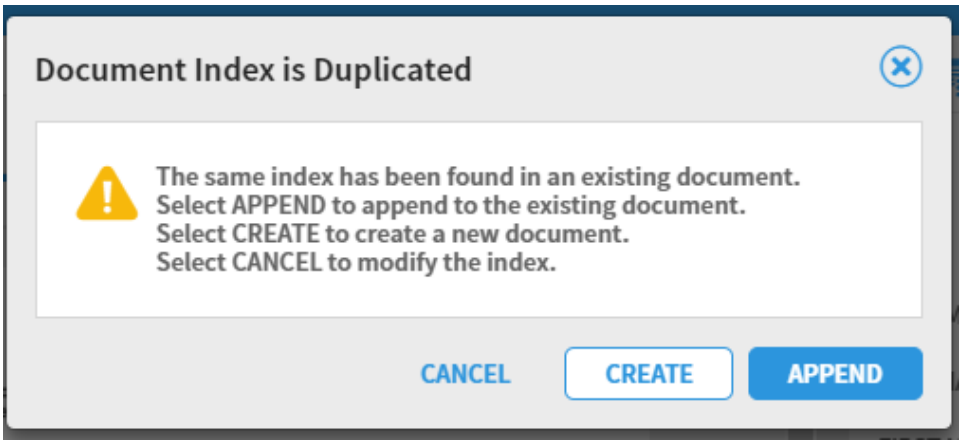
A) **Click on the "Last Modified Index" icon**
The fields will auto populate with the Previous index values.

B) **Select the new document type**
From the drop down, list and
Click on save

3. **If the document belongs to a different Banner ID # click on the "Create Another Document" icon and enter in the new ID and Document Type and then click save.**

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

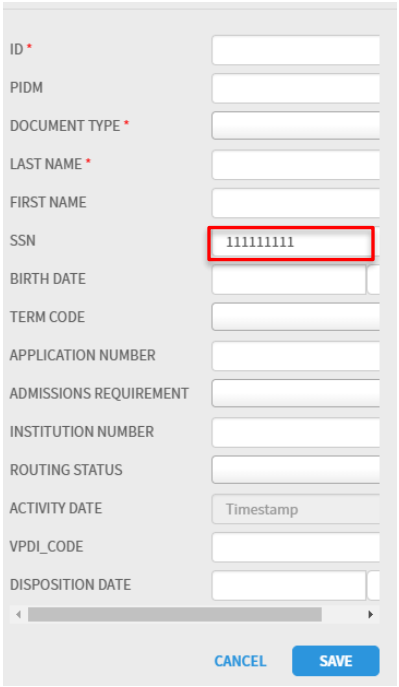
DOCUMENT INDEX IS DUPLICATE



If the following message appears after indexing a document this means that a document with the exact indexing data already exist in the system and this document will need to be appended to the existing document.

- Select APPEND to append the document to the exiting document
- Select Create to create a new document entry

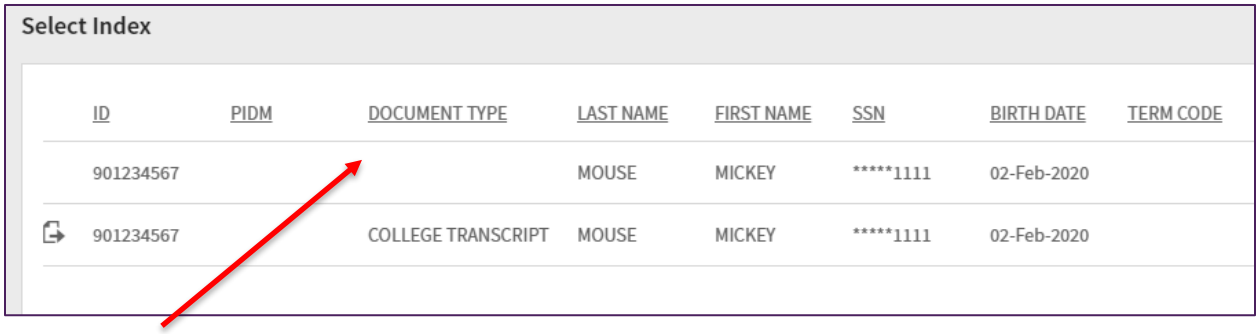
INDEXING BY LAST NAME, FIRST NAME, SSN OR DOB



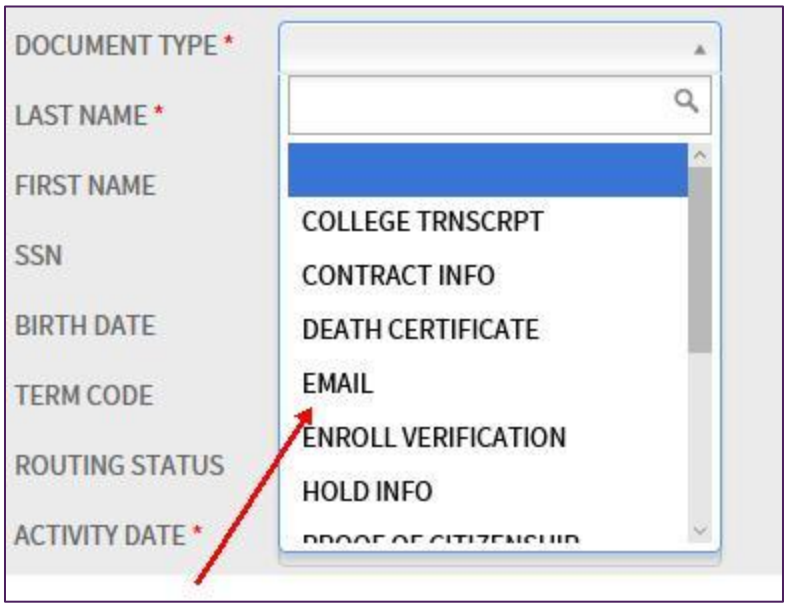
If the Banner ID #is not known, you can index by any of the following or a combination of following Last Name, First Name, or SSN# or DOB

Enter the information into the field and select the Key Reference and index icon

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |



The data will display based on the information entered. Always select the row where the document type is blank unless you want to append the current document to the document type that is listed.



Select the document type from the dropdown list and click on SAVE

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

COPY OR MOVE A DOCUMENT

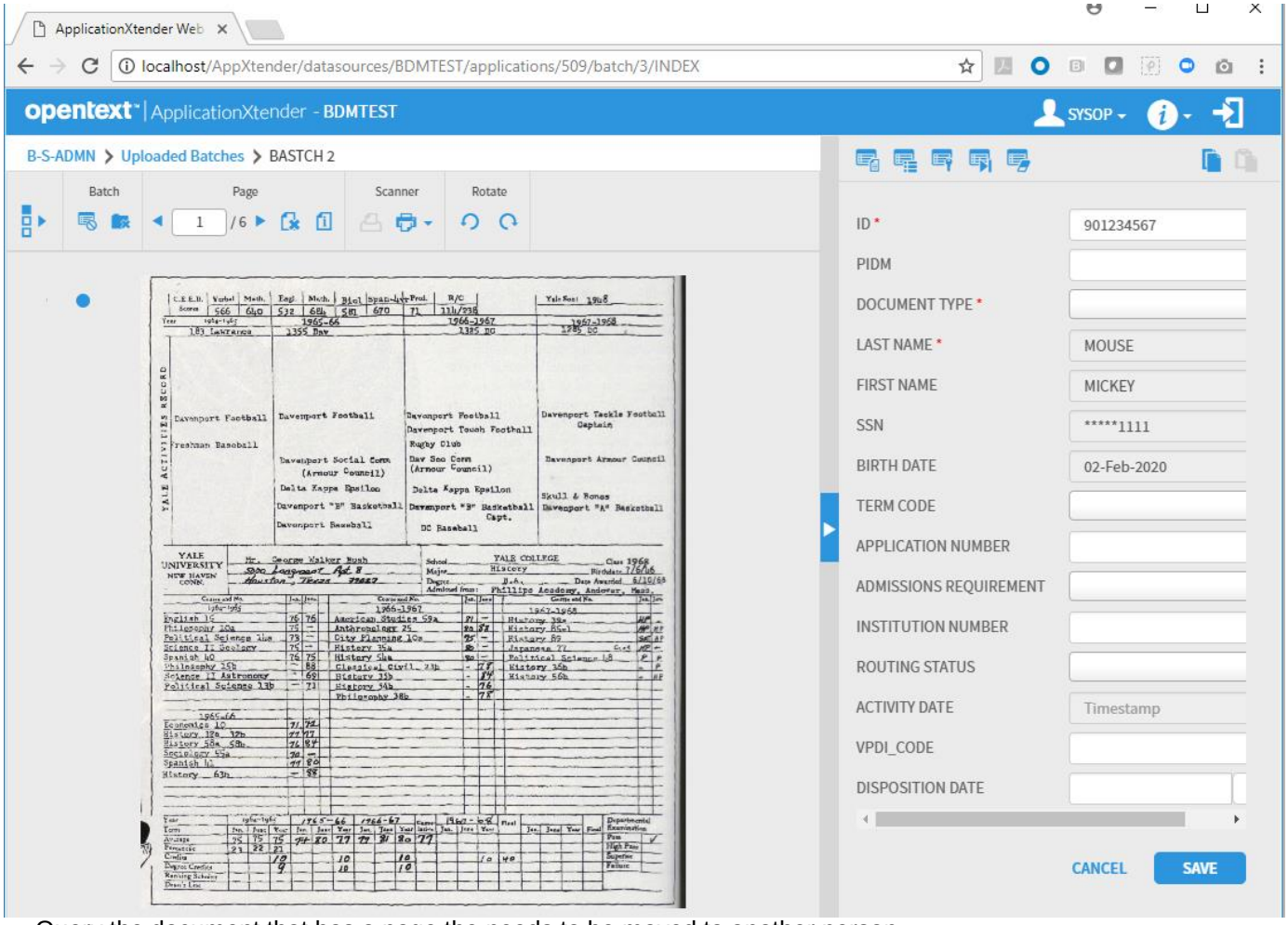
Examples of using Copy/Move Feature:

1. One or more pages of a multiple page document were indexed to the wrong person
2. Multiped documents indexed to one index value need to be sent back to the batch list, so that each page can be indexed separately

.

3. A page that is indexed needs to also be indexed to another person

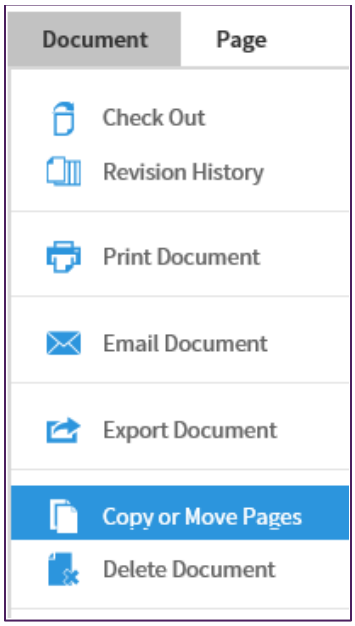
STEP 1



Query the document that has a page the needs to be moved to another person.

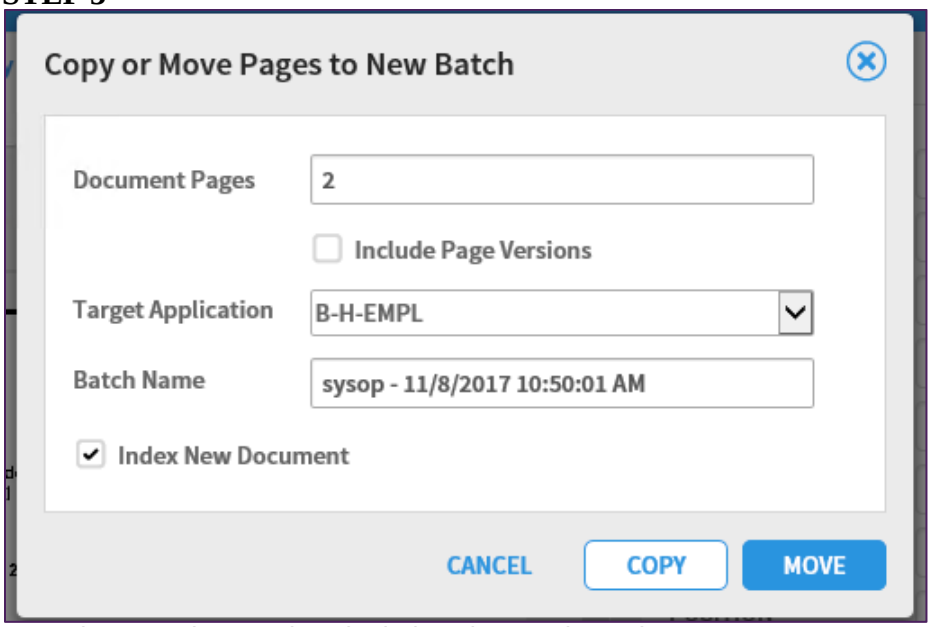
© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

STEP 2



Select MOVE

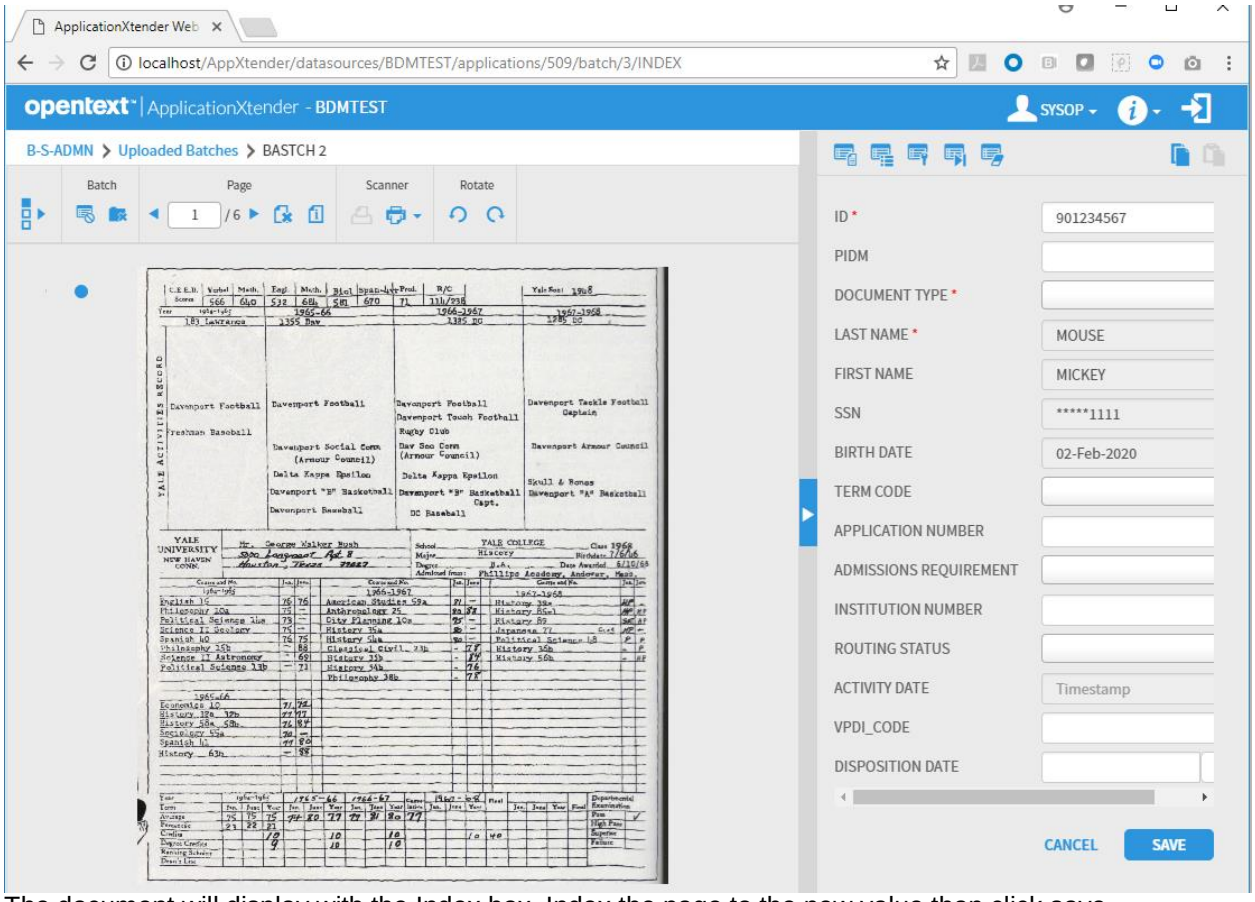
STEP 3



Enter the page that needs to be indexed to another value
Check the Index New Document box. Click on Move

IMPORTANT: if you don't check the Index a New Document box the documents selected with go back to the batch list and will be indexed with the batch name {user name – date - time}

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

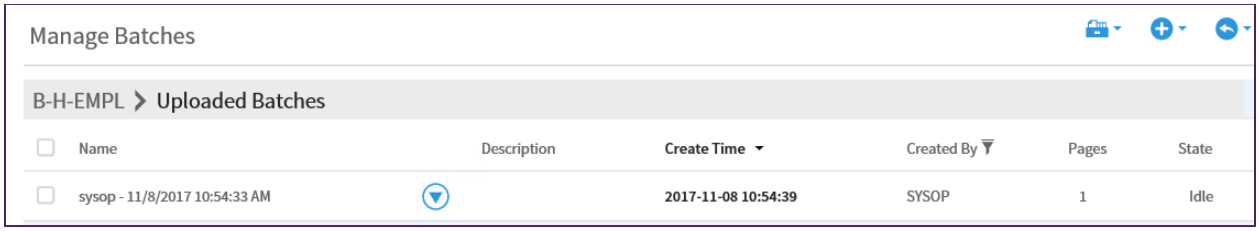


The document will display with the Index box. Index the page to the new value than click save.

MOVE DOCUMENT BACK TO BATCH LIST

To move pages back to the batch list do Steps 1 and 2 on Step 3

- Enter a value in the Batch Name field or leave default
- Do not check the Index New Document box
- Click Move



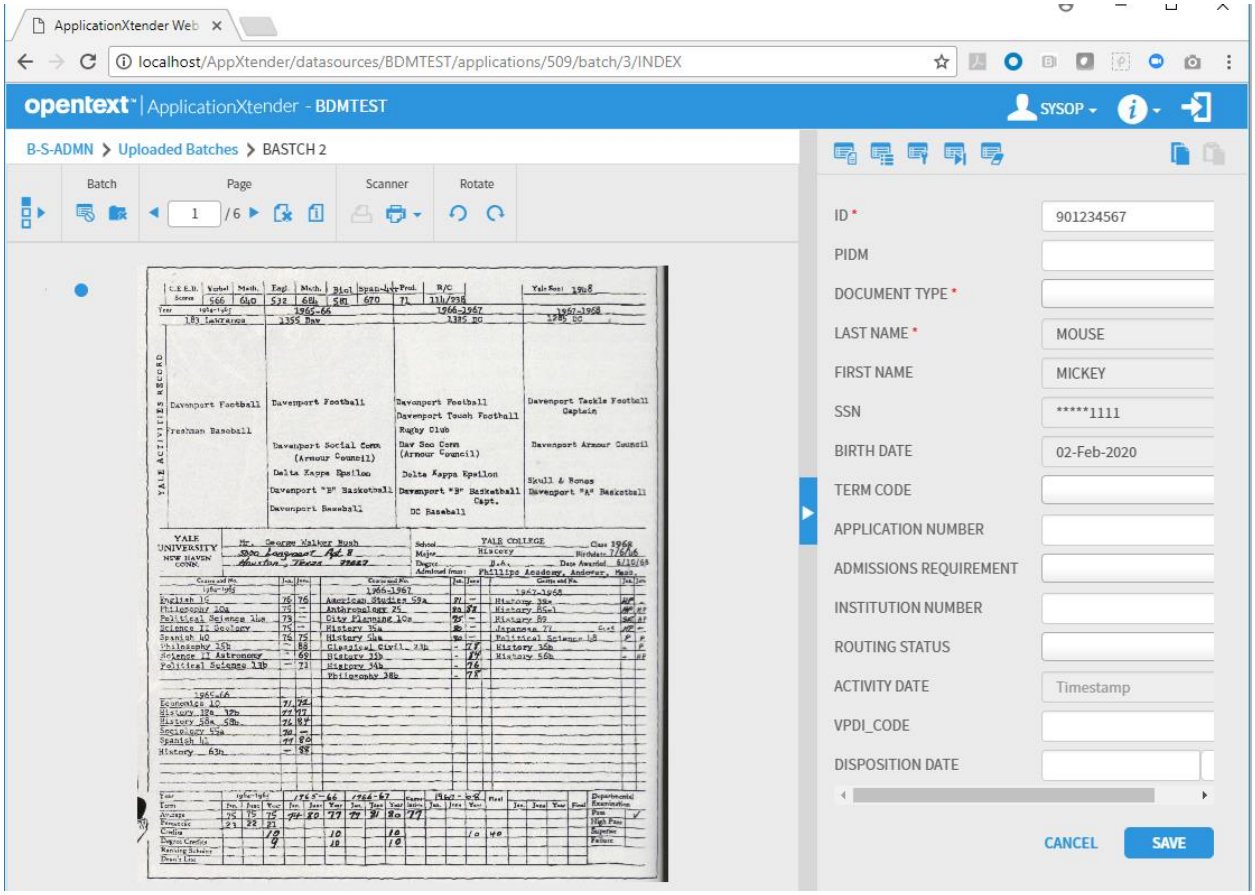
The documents will be moved back to the batch list for re-indexing

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

COPY A PAGE

To make a copy of a page and index to another batch do Steps 1 and 2 on Step 3

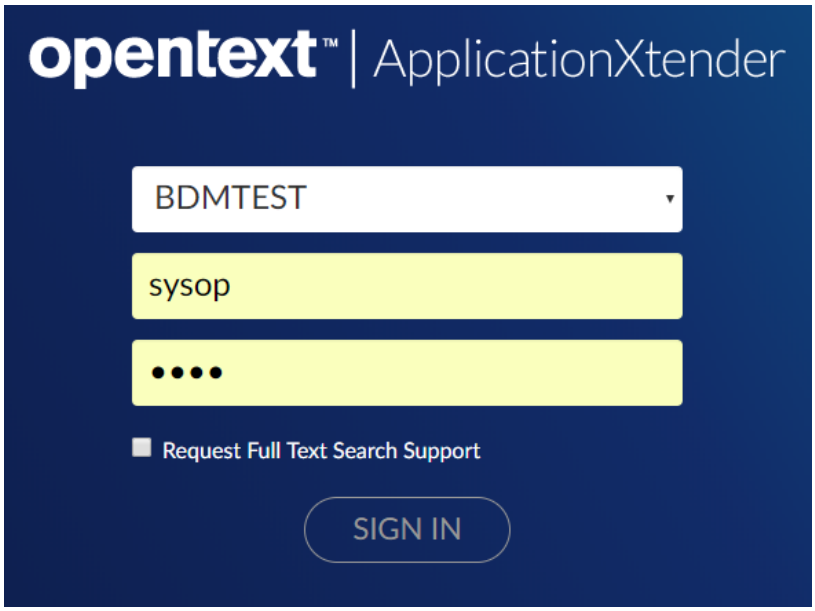
- Check the Index New Document box
- Click on COPY



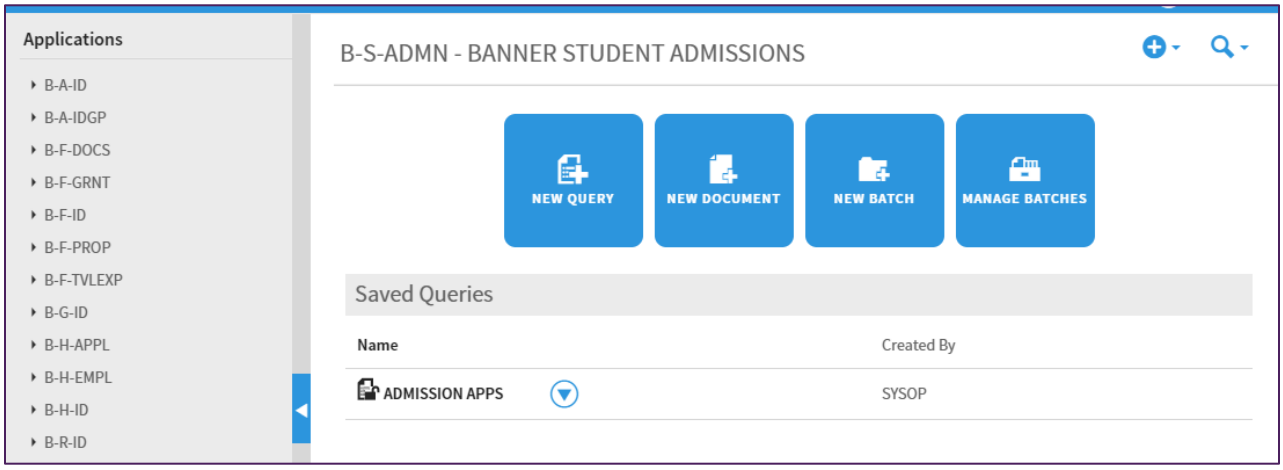
The document will display with the index box. Index the document to the new value and click on SAVE.

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

QUERY IN WEB ACCESS



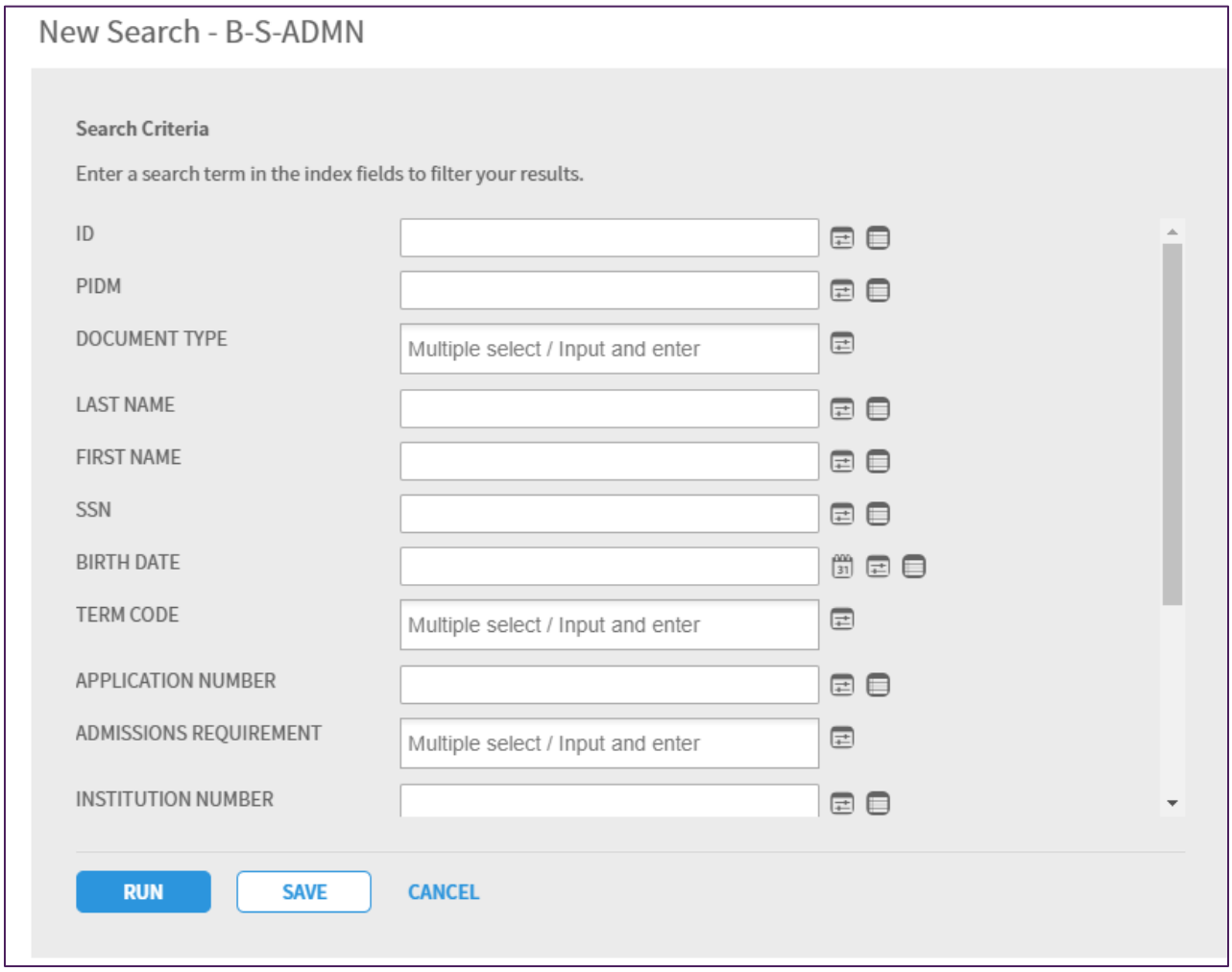
Log into Web Access



NOTE: When the page opens you will see the applications you have access to on the left and you might see saved queries.

Select the NEW Query button

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |



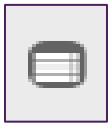
You have four search options:

1. **BASIC SEARCH** - Enter one or more indexes into the fields and click on RUN. The Query results list will display for more than one document. Click on the line to display the image.

2. **SEARCH RANGE**

The search range will do a search based on the criteria entered. select the icon and a search range box it will display with a list of Types Comparisons (e.g. Between, Great than, Less than)

3. **LIST SEARCH**

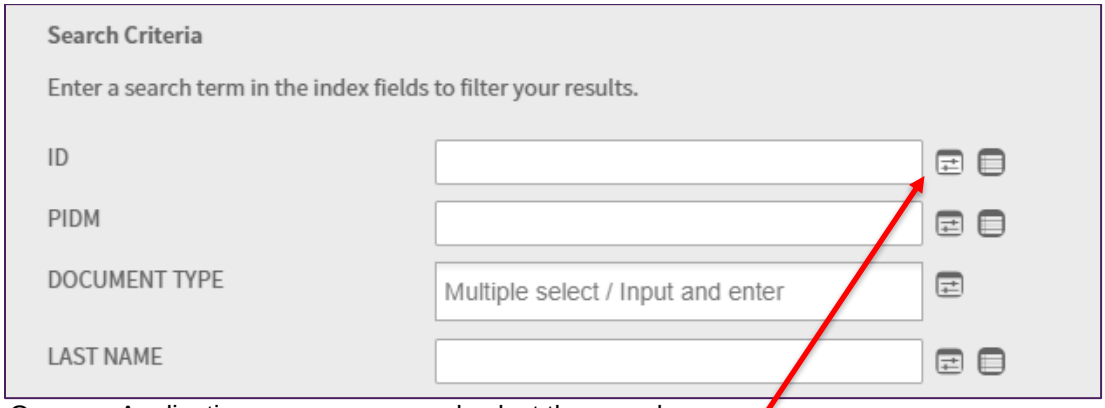


The list search will let do a search based on a list of information entered.

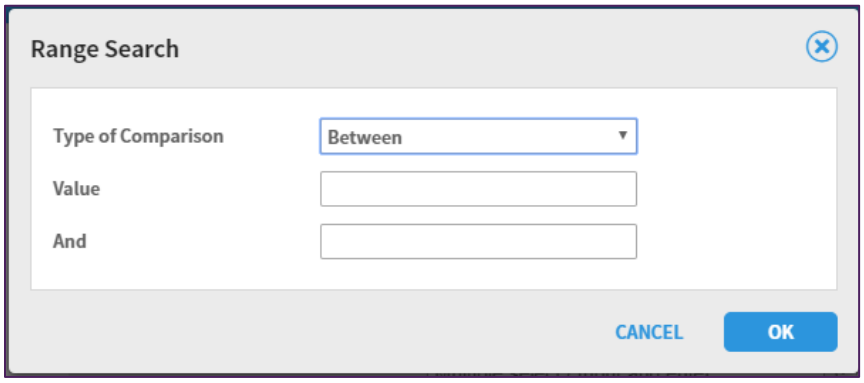
4. **A SAVED QUERY –** A query that is saved and you can repeat.

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

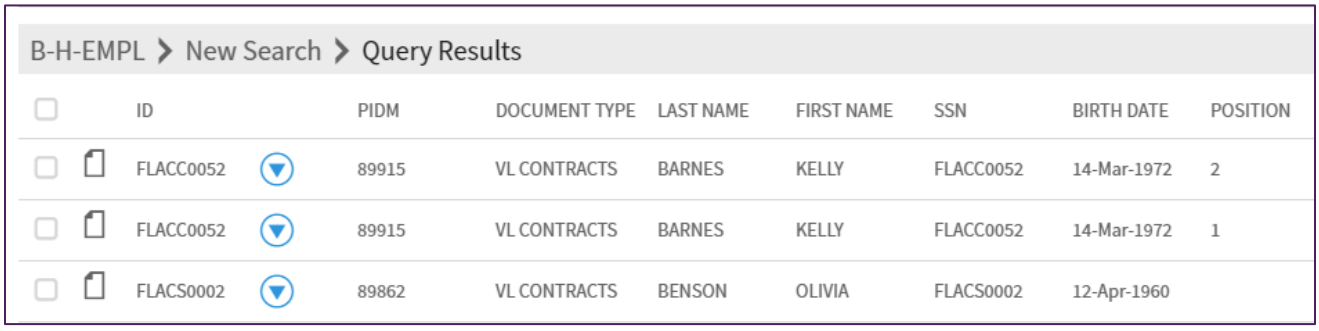
HOW TO CREATE A SEARCH RANGE



Open an Application query screen and select the search range icon next to the field that you want to query on.



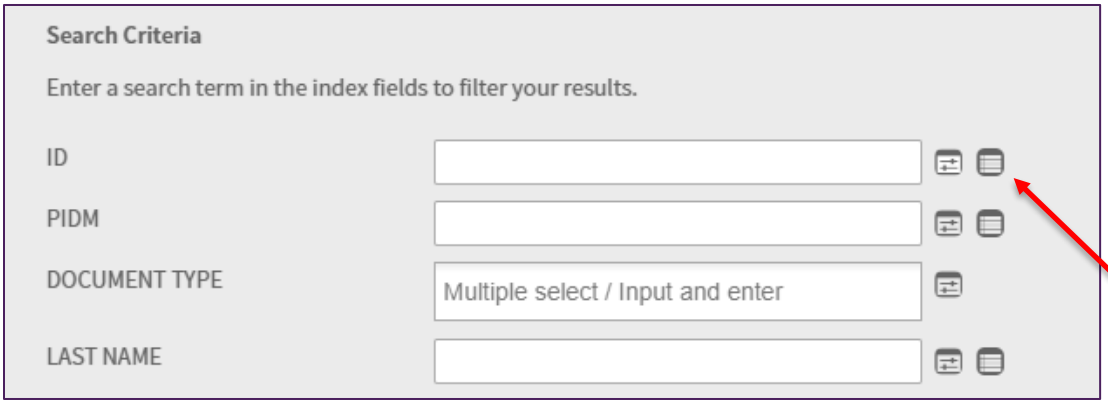
Choose a Type of Comparison And enter the VALUE and Click on OK. Then select RUN.



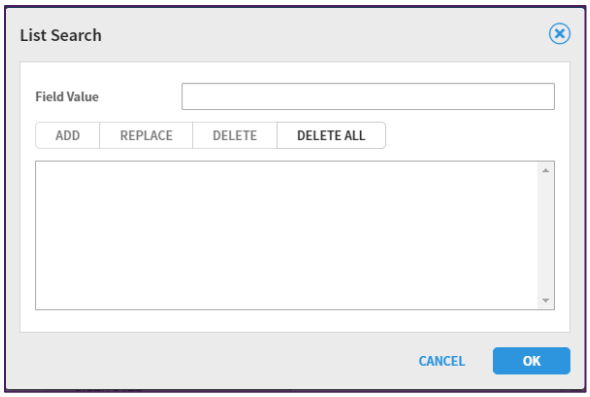
Your Query will display in the result set list.

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

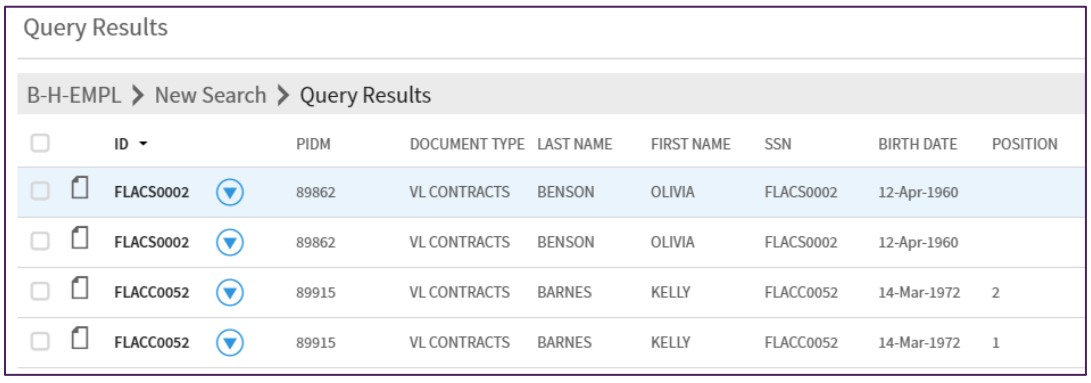
HOW TO CREATE A SEARCH LIST



Open an Application query screen and select the search list icon next to the field that you want to query on.



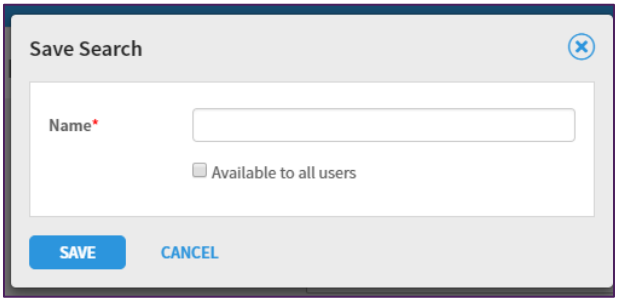
Enter a value in the FIELD VALUE then click ADD. Repeat steps until all your values are display In the box. Then click OK.

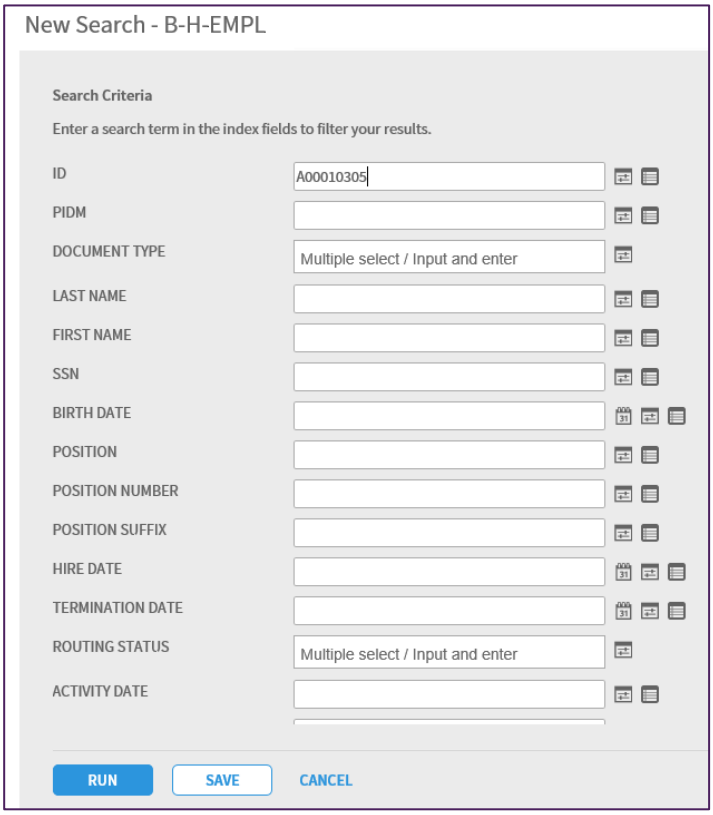


Your Query will display in the result set list.

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

HOW TO CREATE A SAVED QUERY



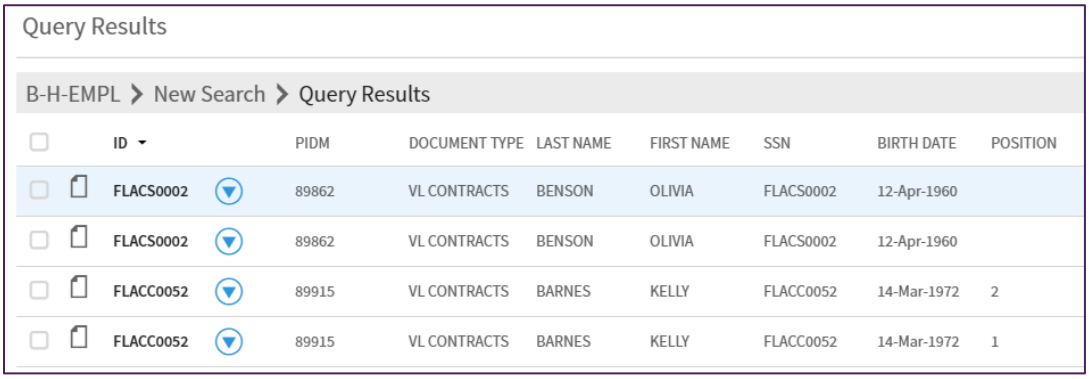


Enter search data into the query field. Click on Save at bottom of screen

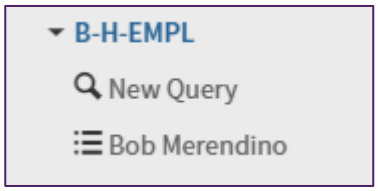
Enter the name of the save search in the Name field and click Save.

NOTE: You can select Available to all users if you want all persons that have access to the application to see the saved search otherwise do not check the box and only you will see the save search on you PC.

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

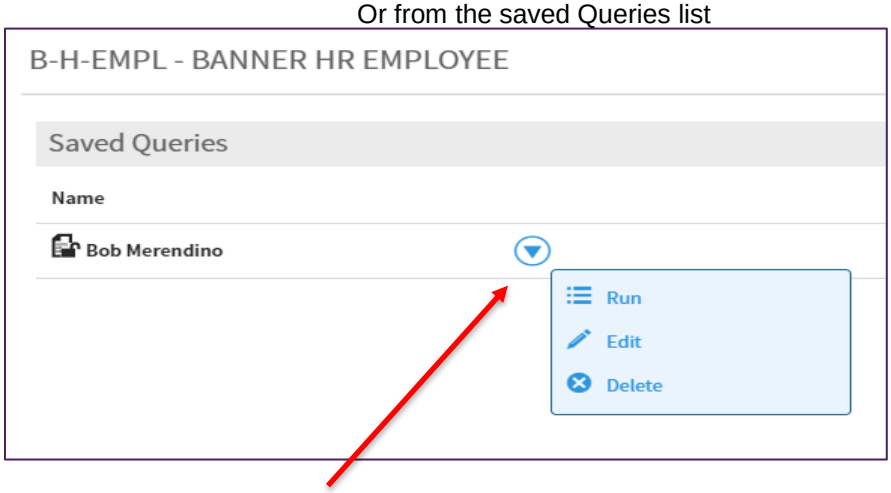


Your Query will display in the result set list.



You can access the saved search from the application list node

Or from the saved Queries list



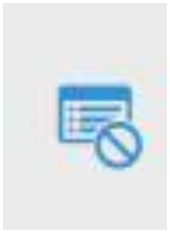
You can run, Edit, or Delete the saved query from the saved query list.

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

ICON DESCRIPTIONS

SHOW/HIDE THUMBNAILS

DISPLAY INFORMATION ABOUT PAGE



CANCEL INDEXING

ROTATE LEFT/RIGHT

CREATE ANOTHER DOCUMENT

ZOOM

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

FIT WIDTH

FIT HEIGHT

ATTACH CURRENT PAGE

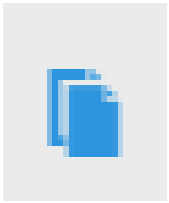
ATTACH ALL PAGES

Delete Document

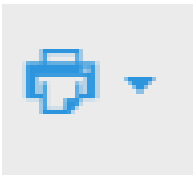
© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

Delete Page

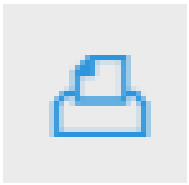
Delete Batch



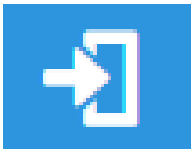
Copy Move



Select Scanner



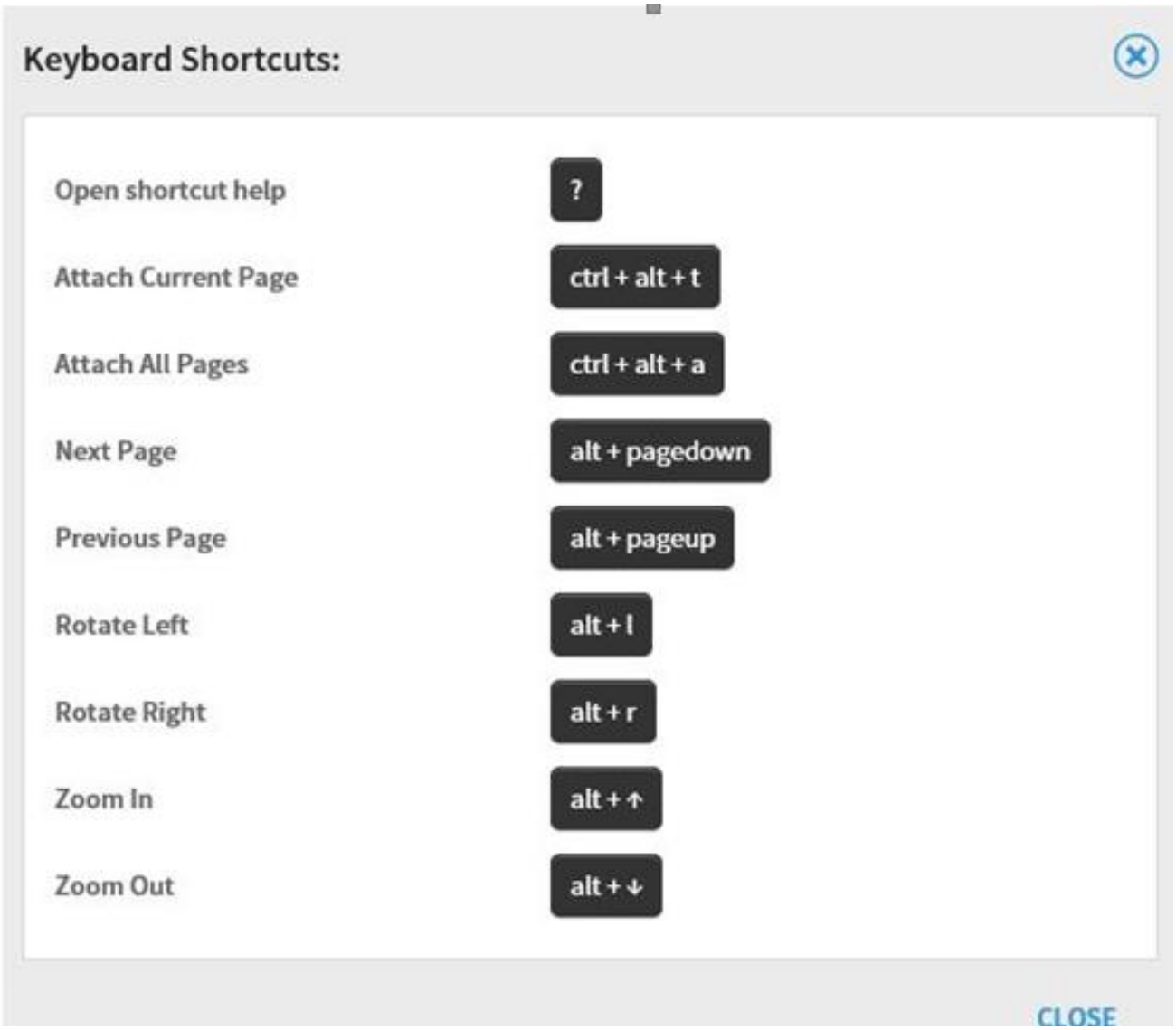
Scan



Log out

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

HOT KEYS



© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |

ellucian.

Confidential Business Information

This documentation is proprietary information of Ellucian and is not to be copied, reproduced, lent or disposed of, nor used for any purpose other than that for which it is specifically provided without the written permission of Ellucian.

Prepared By:
Ellucian Headquarters
2003 Edmund Halley Drive, Suite 500
Reston, VA 20191, USA
© Ellucian. All rights reserved. The unauthorized possession, use, reproduction, distribution, display, or disclosure of this material or the information contained herein is prohibited.

In preparing and providing this publication, Ellucian is not rendering legal, accounting, or other similar professional services. Ellucian makes no claims that an institution's use of this publication or the software for which it is provided will insure compliance with applicable federal or state laws, rules, or regulations. Each organization should seek legal, accounting, and other similar professional services from competent providers of the organizations own choosing. Ellucian the Ellucian logo, and Banner, Campus Pipeline, Luminis, Power CAMPUS, Pocket Recruiter are trademarks or registered trademarks of Ellucian Inc. or its subsidiaries in the U.S. and other countries. All other trade names are trademarks or registered trademarks of their respective holders.

The configuration described in this document is provided by Ellucian for illustrative purposes only and is not a recommendation by Ellucian that your institution should acquire the equipment reflected herein. Ellucian makes no guarantee or commitment that the equipment described below will be sufficient for your institution's needs, and the equipment description is merely intended to reflect a starting point for your institution's consideration. Each software implementation is unique, and each institution has different needs and/or requirements. Further, system performance and response times are dependent upon a variety of factors, including network latency, hardware and peripheral configuration, systems tuning, number of users at a given time, peak periods of usage, Internet connectivity, the number of applications being deployed on a processor, as well as hardware sizing and processor capability. Accordingly, the appropriate equipment and configuration for your institution may vary in many regards from the one described in this document. You must independently make the determination as to the equipment to acquire in connection with the implementation of the contemplated software. Ellucian recommends that you consult directly with your hardware vendor of choice regarding overall configuration selection and sizing recommendations. Ellucian has no responsibility or liability in connection with this determination, and Ellucian disclaims any warranties of any kind in connection with the hardware you select, including any warranties of merchantability or fitness for a purpose.

© 2013 Ellucian. All Rights Reserved - Confidential & Proprietary |