
BDM UPDATE

For ApplicationXtender 16.3

OVERVIEW OF BDM

- Banner Document Management is the college's imaging and document management system that is connected to Banner.
 - This session is focused on the changes for the upgrade and assumes you already have experience using BDM.
- ApplicationXtender (AKA *AppXtender* or *Xtender* or *AX*) is the main software behind BDM that actually stores, retrieves, and displays the documents.
- ApplicationXtender Web Access (AKA *WebXtender*) allows for scanning, indexing, batch scanning, batch indexing, viewing, annotating, and sharing documents from within a web browser.
- BDM can be accessed directly, or from within Banner Admin Pages.

WHAT'S NEW IN AX 16.3



Web Access has been completely redesigned with a modern web interface.



Use any current web browser (No more ActiveX controls).



Improved navigation.



Simplified toolbar and interface.



Drag-and-Drop files to import.



Web Scanning requires Captiva Cloud Toolkit to be installed on the desktop, along with any needed scanner drivers.

IF YOU HAVE A SCANNER

- Only scanning stations require the Captiva Cloud Toolkit.
- If you don't have it, the select scanner button will be grayed-out.
- To request installation, submit a Service Request from the link on the Employee Portal.

ITS

- [ITS Service Request Form](#)
- SMCCD Password Management
- O365 Login
- O365 Tutorials
- Jaz's Web Tips
- Change Password

User Settings

Data Source

Application

▶ Search/Result Set

▶ Document View

▶ Index

▼ Import

Display Batch in Separate Popup Window

Enable Scanning

Import Email Attachment as New Page

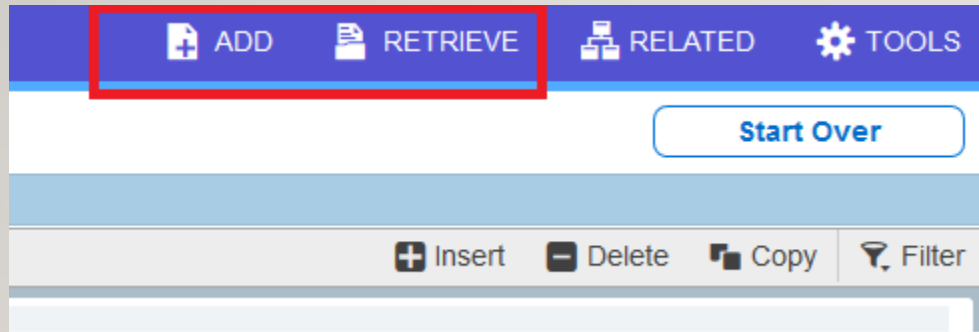
Start New Document from a temporary Batch

IF THE SCANNER BUTTONS DON'T APPEAR


- Click on your Username in the upper right and select **User Settings**.
- Open the **Import** section
- Make sure **Enable Scanning** is checked.

LOGIN / OPEN BDM

- From within Banner Pages, click Add or Retrieve Button



- Be aware of popup blockers:

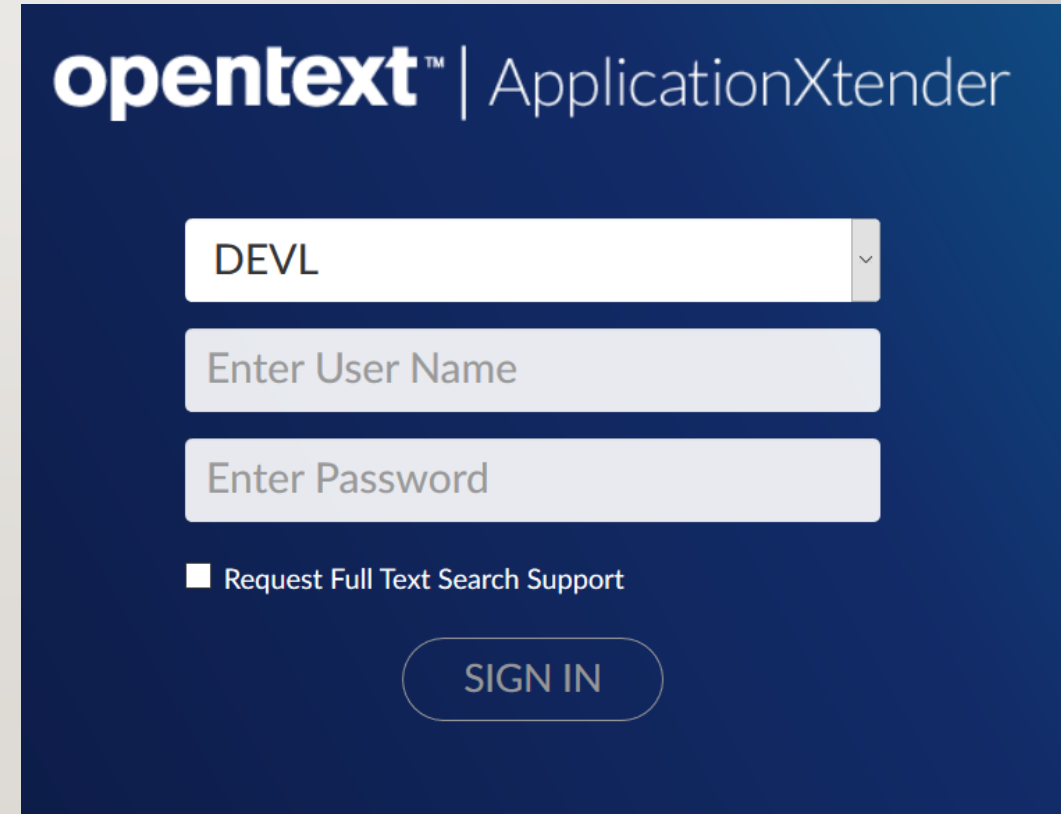
 Firefox prevented this site from opening a pop-up window.

- Or login directly to AppXtender using SSO credentials (same as Banner Admin Pages)



LOGIN / TIMEOUT

- If your session is timed out, do not enter your credentials on the OpenText Login screen. Close the browser tab and login again from Banner or the direct link from the Banner Portals Page.



opentext™ | ApplicationXtender

DEVL

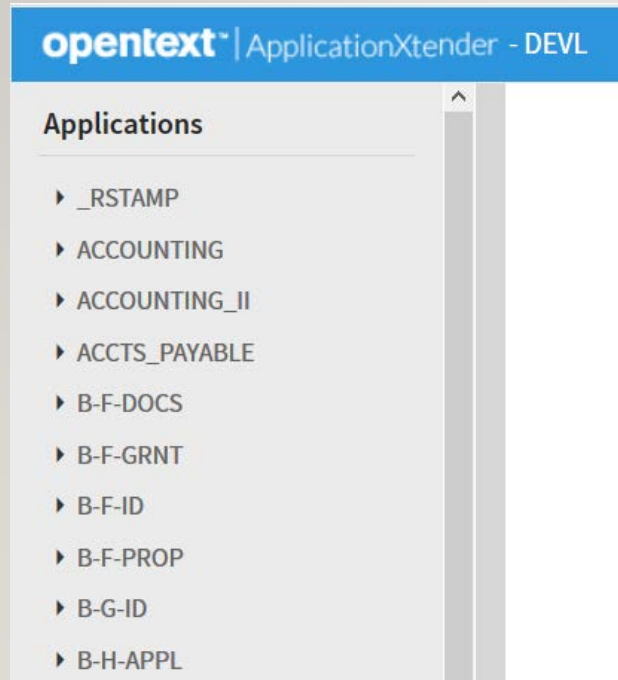
Enter User Name

Enter Password

Request Full Text Search Support

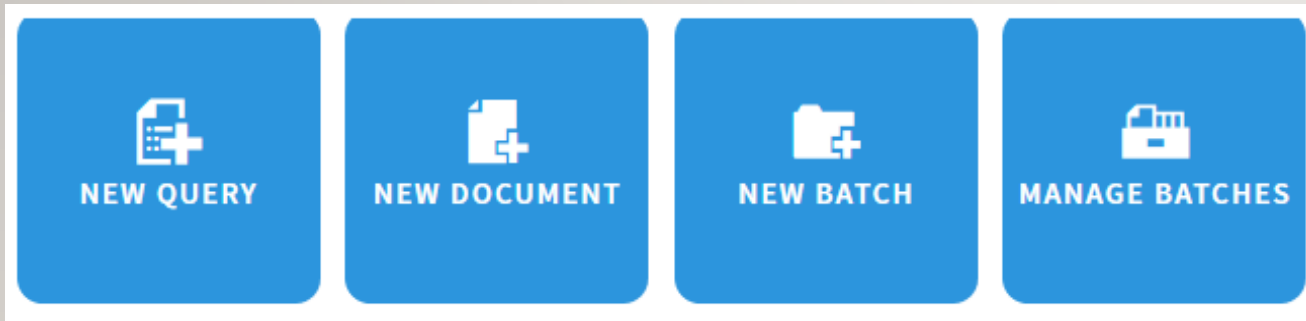
SIGN IN

SELECT AN APPLICATION



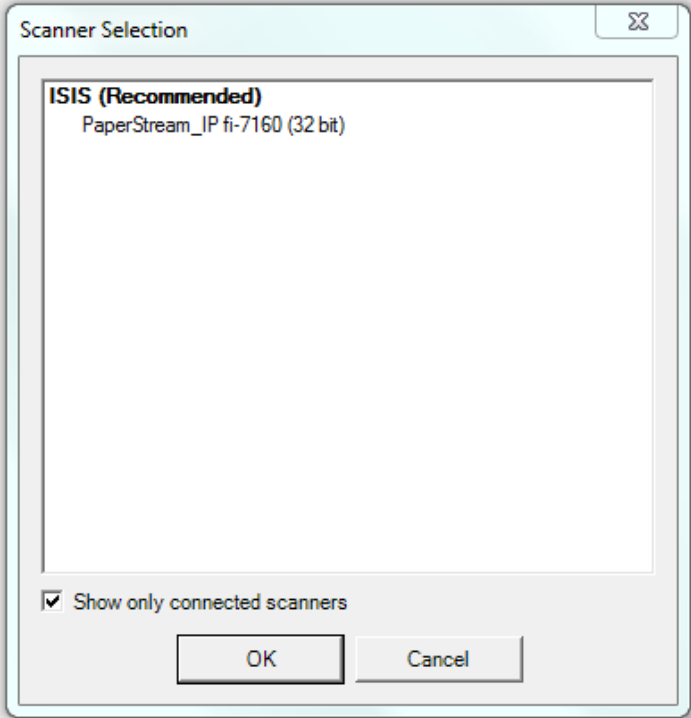
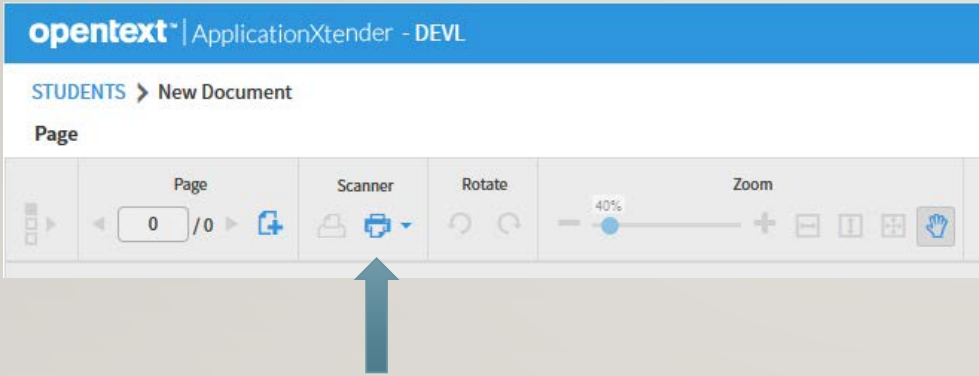
- The list of Applications you can access will be on the left
- Applications are like file cabinets, they are the high level containers where similar types of documents are stored with the same index fields.

SELECT AN ACTION



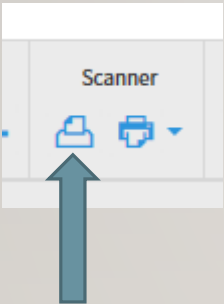
- New Query: Search for a document(s)
- New Document: Scan or import one document
- New Batch: Scan or import multiple documents (or one document with different indexes for some pages)
- Manage Batches: See the list of batches waiting for indexing

SELECT SCANNER

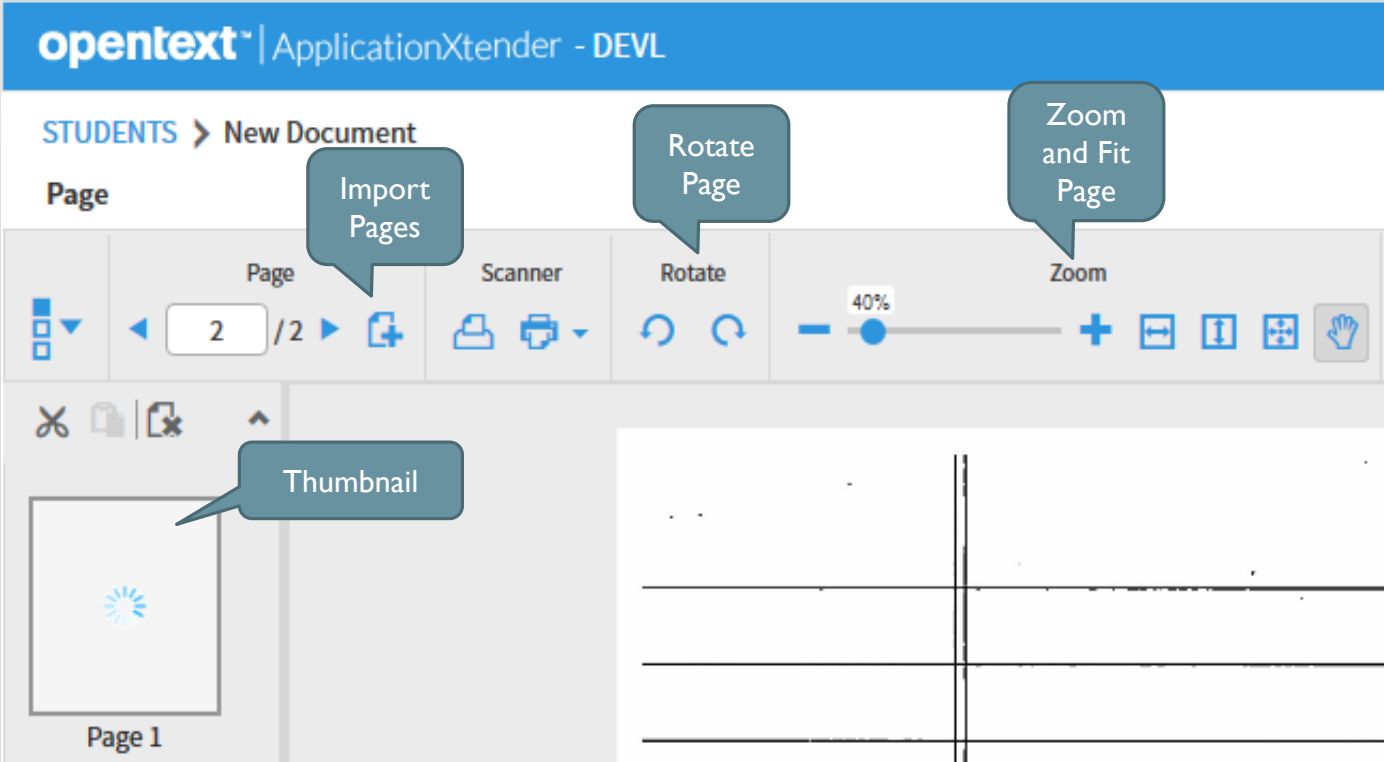


SCAN

Start Scanning:



Review, Edit, and Index:

A screenshot of the opentext ApplicationXtender interface. The top blue header contains the text "opentext | ApplicationXtender - DEVL". Below this, a breadcrumb trail shows "STUDENTS > New Document". The main toolbar includes a "Page" section with a page number "2 / 2", a "Scanner" section with printer icons, a "Rotate" section with circular arrows, and a "Zoom" section with a slider set to "40%". Callout boxes with white text and blue borders point to specific features: "Import Pages" points to the page navigation icons, "Rotate Page" points to the rotate icons, "Zoom and Fit Page" points to the zoom slider, and "Thumbnail" points to a small square thumbnail labeled "Page 1" in the bottom left corner. The main workspace shows a scanned document with horizontal lines.

Page Menu

Scan and View Tools

Annotation Tools

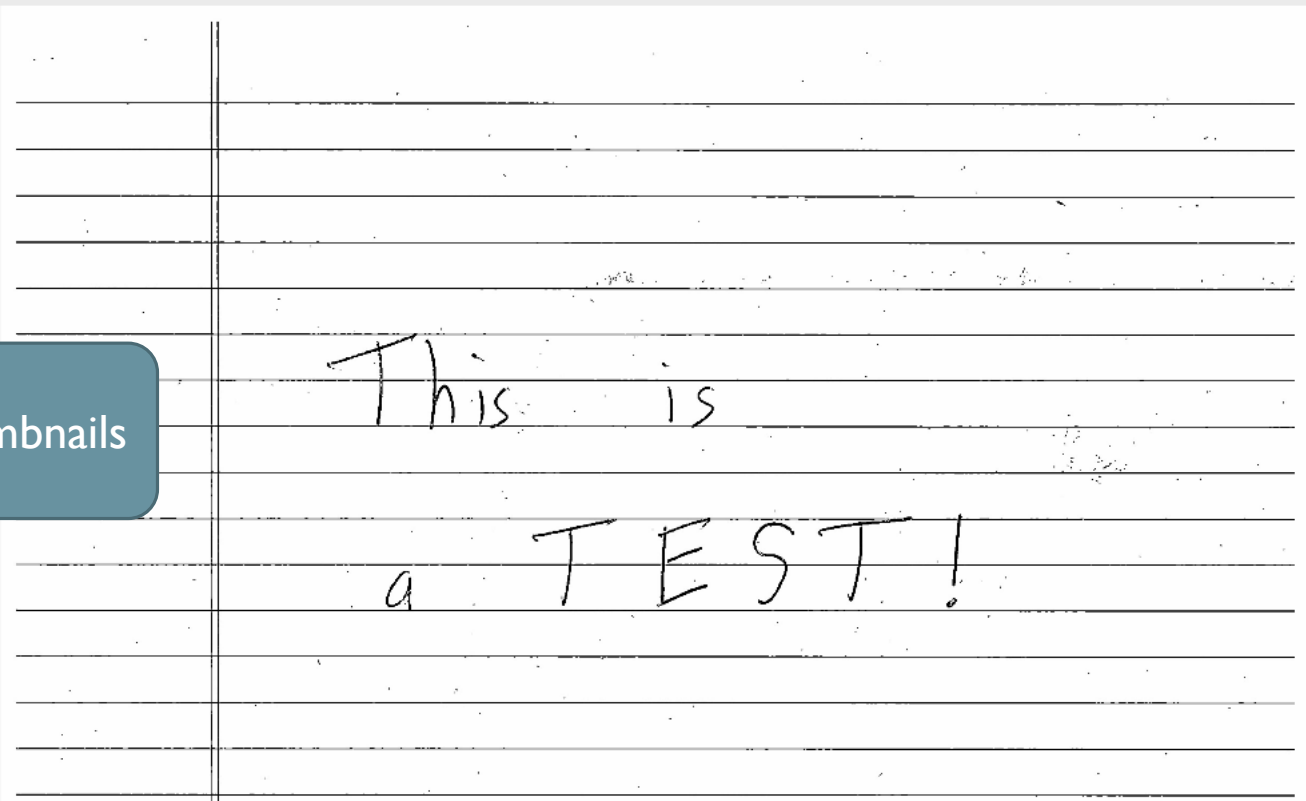
Indexing

Page: 2 / 2
Scanner, Rotate, Zoom (40%)

Annotation, Format, Actions

Page 1
Page 2

Thumbnails



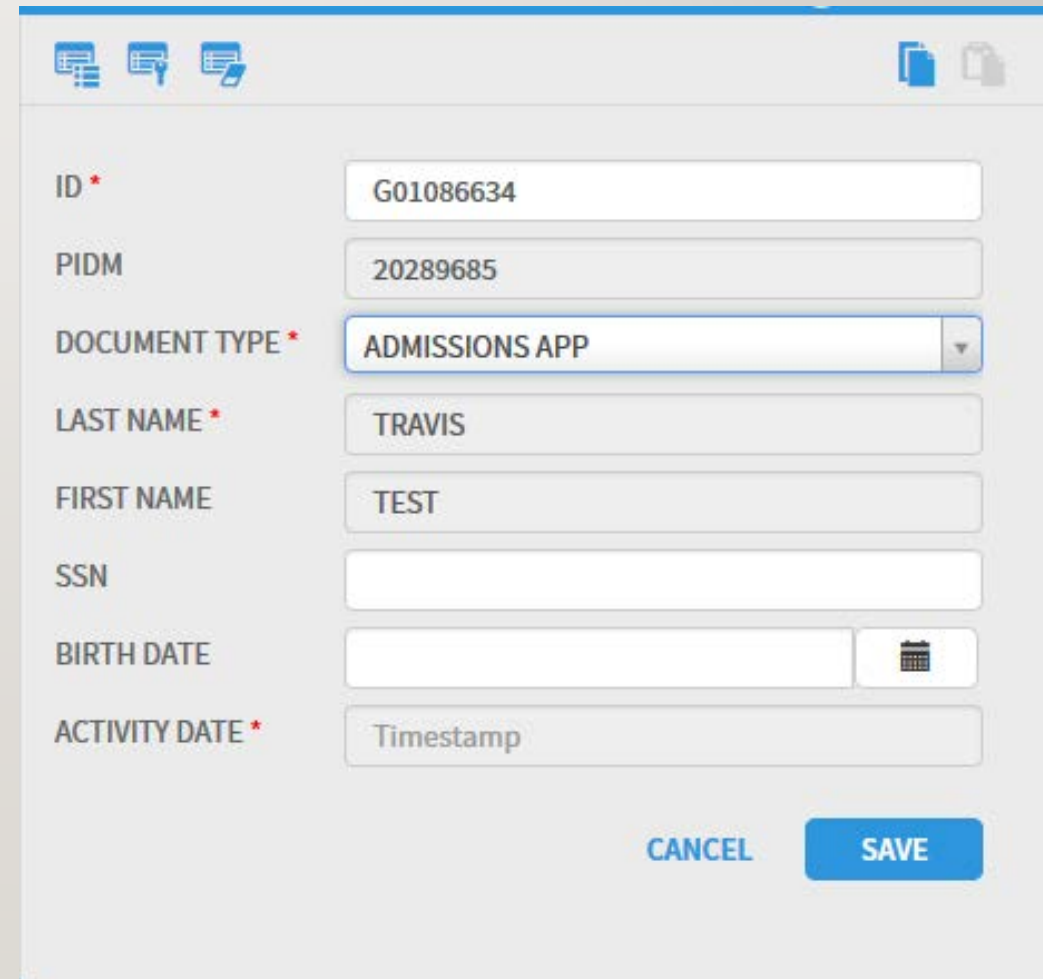
Indexing Form:

- ID *
- PIDM
- DOCUMENT TYPE *
- LAST NAME *
- FIRST NAME
- SSN
- BIRTH DATE
- ACTIVITY DATE * (Timestamp)

CANCEL SAVE

INDEX

- Enter an ID and press tab to load known values from Banner (called Key Reference data).
- Select a Document Type from drop down.
- Index fields will vary by application.
- Click Save.

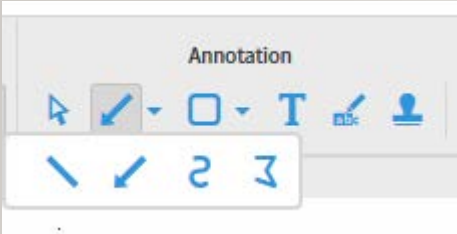


The screenshot shows a web form with the following fields and values:

Field	Value
ID *	G01086634
PIDM	20289685
DOCUMENT TYPE *	ADMISSIONS APP
LAST NAME *	TRAVIS
FIRST NAME	TEST
SSN	
BIRTH DATE	
ACTIVITY DATE *	Timestamp

At the bottom right, there are two buttons: "CANCEL" and "SAVE".

ANNOTATION TOOLS



Add Text Annotation

Annotation Text:
This page was missing the signature.

Font
Size 12

Bold Underline
 Italic Strike out
 Transparent

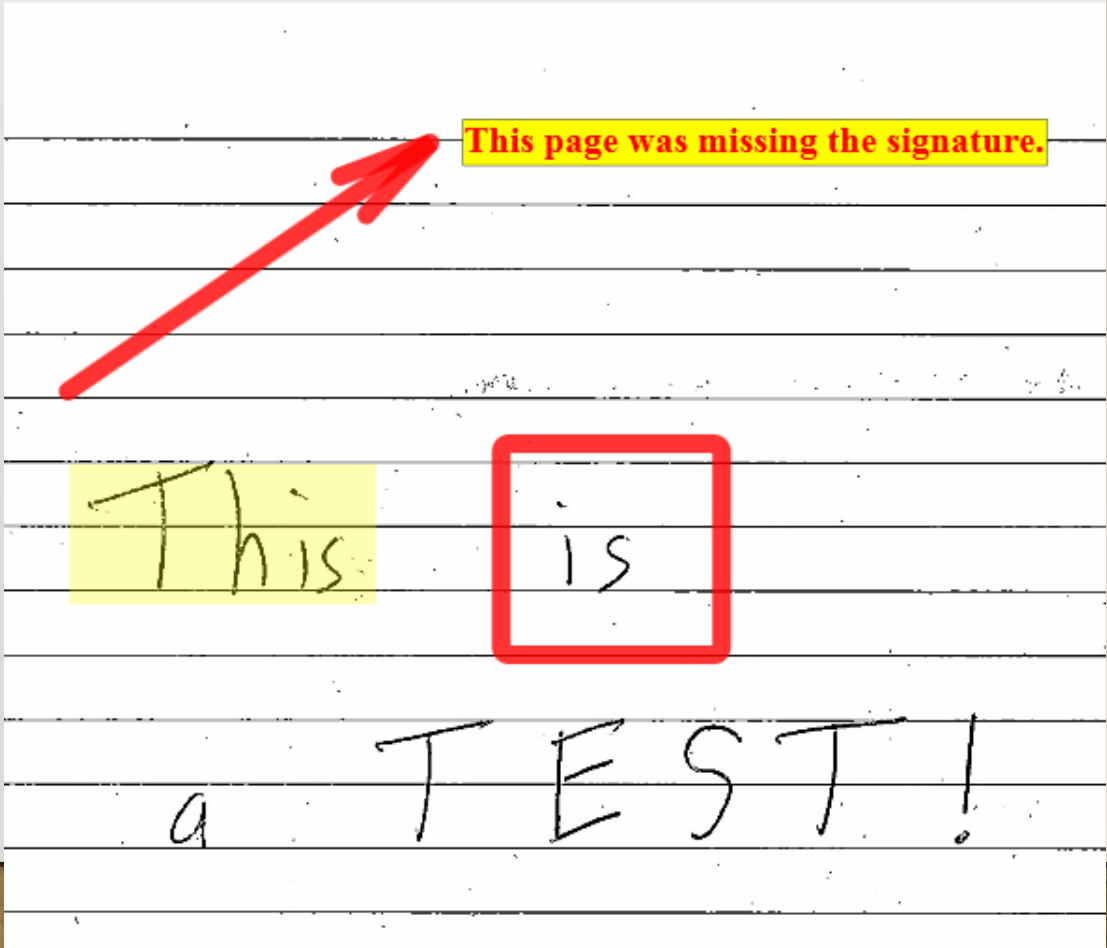
Color

Set as Default

Display as Icon

Created:
Modified:

CANCEL OK



















QUERY

- Enter the fields you wish to search on.
- Wildcards are allowed (*).
- Can also enter a range of values or list of values.

New Search - STUDENTS

Search Criteria
Enter a search term in the index fields to filter your results.



ID	<input type="text" value="G01086634"/>	 
PIDM	<input type="text"/>	 
DOCUMENT TYPE	<input type="text" value="Multiple select / Input and enter"/>	
LAST NAME	<input type="text"/>	 
FIRST NAME	<input type="text"/>	 
SSN	<input type="text"/>	 
BIRTH DATE	<input type="text"/>	  
ACTIVITY DATE	<input type="text"/>	 

Include previous document revisions

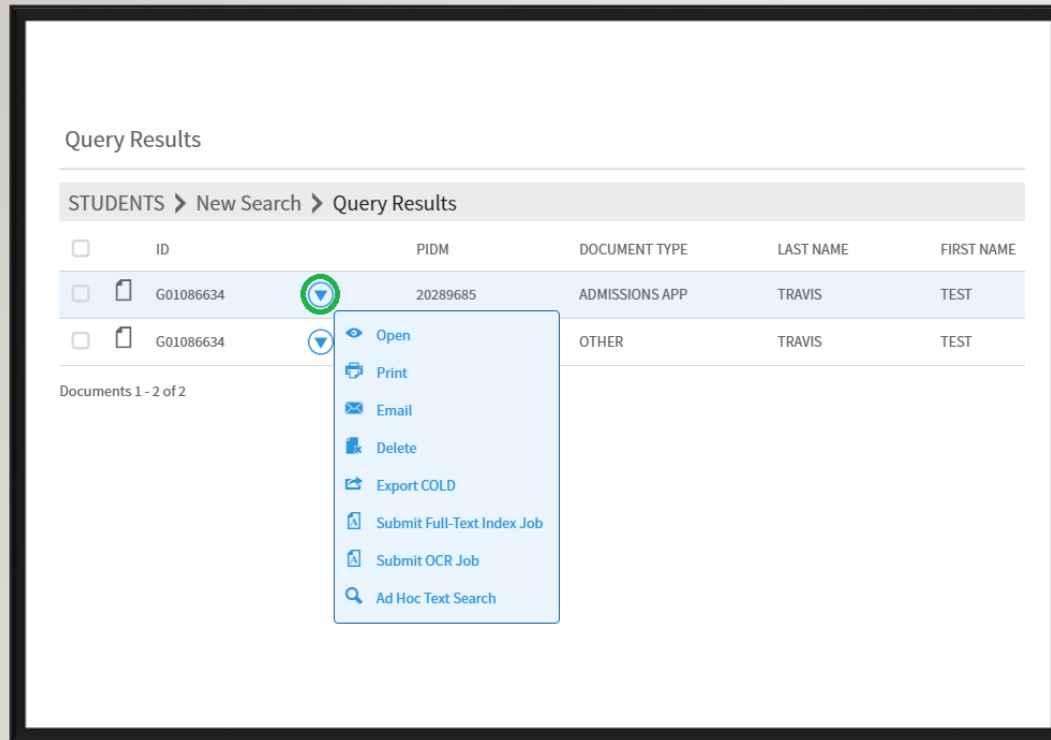
QUERY RESULTS

Query Results

STUDENTS > New Search > Query Results

<input type="checkbox"/>	ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME
<input type="checkbox"/>	 G01086634	20289685	ADMISSIONS APP	TRAVIS	TEST
<input type="checkbox"/>	 G01086634		OTHER	TRAVIS	TEST

Documents 1 - 2 of 2

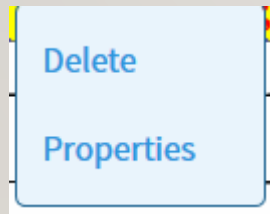


- Open
- Print
- Email
- Delete
- Export COLD
- Submit Full-Text Index Job
- Submit OCR Job
- Ad Hoc Text Search

- Double-click a row to open document.
- Mouse-over the page symbol for a preview.
- Click the menu arrow for more options.

VIEW DOCUMENTS

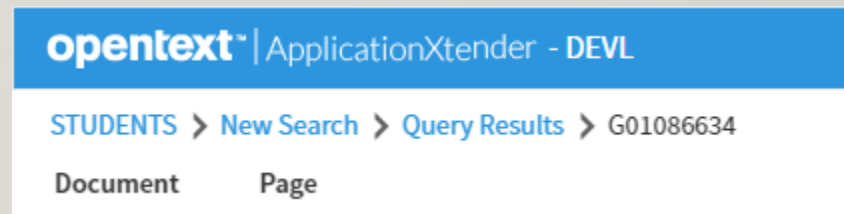
- Same controls available for Zoom and Annotation as when you scanned.
- Can right click on pages and annotations for limited actions.

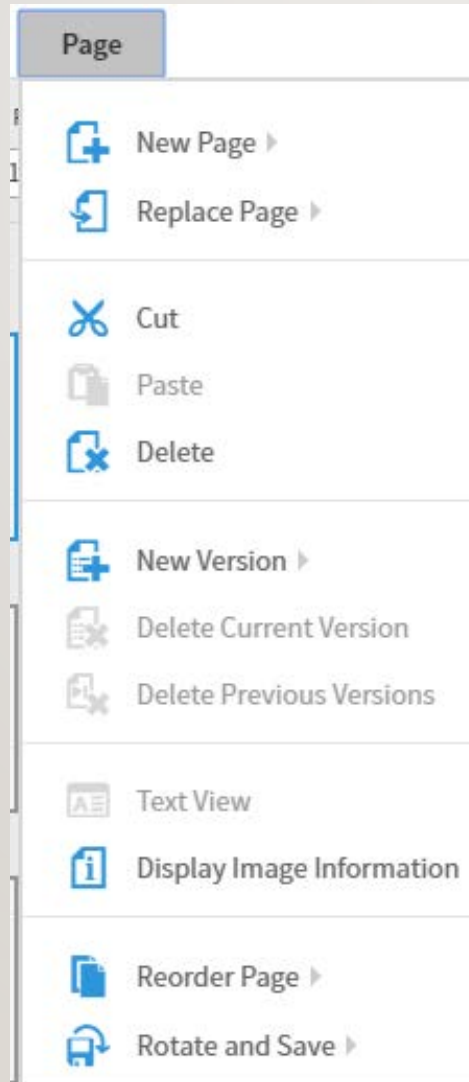
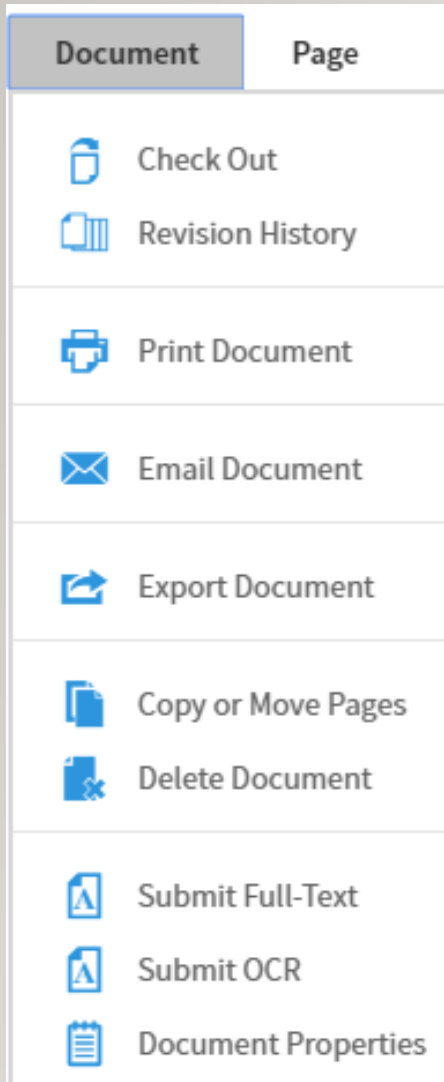


- Navigate documents from search results.



- Email, Export, Print
- Breadcrumb Trail Navigation



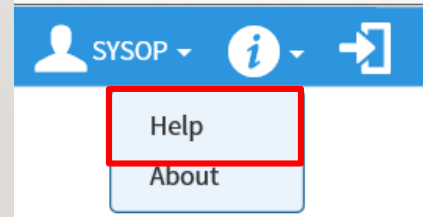


MENUS

- Manage the current document
- Manage page(s) within the current document
- Not all features are available.
- Same application security applies to these actions as in previous versions.

DOCUMENTATION

- Online Help



- Ellucian: BDM Scanning and Indexing in Web Access 16.3
- OpenText: ApplicationXtender Web Access 16.3 User Guide

User Guide > Creating Documents >

Uploading documents

1. Select the application that you want to add a document to.

Note: If you select an application that has no saved queries, the **New Search** page appears. Either run a query or cancel the **New Search** page to have access to links or to the main panel of the view, both of which enable you to perform document, batch, and query operations.

2. Perform either step:

a. Use the toolbar:

- i. Click the file cabinet drawer icon in the toolbar and select **UPLOAD NEW DOCUMENT**.
- ii. In the **Upload New Document** dialog box, browse and select one or more files.
- iii. Click **UPLOAD**.

b. Drag and drop the electronic file or files from your desktop into the main panel.

Note: If you enabled the thumbnails view in the **User Settings** page, you can also drag and drop the electronic file or files from your desktop into the thumbnails view.

3. Note that the first page of the uploaded file appears in the Document Viewer. If you enabled the thumbnails view in the **User**

NOTES AND REMINDERS

- BDM will be down on Friday, March 8 for the upgrade.
- Banner 8 INB support ends on Friday, March 8. (Users of SKACHRT or EOPS are the only exceptions. Enter an ITS Support Request or bannerhelp@smccd.edu to get the link).
- We suggest using Firefox or Chrome as you web browser. Please don't use Internet Explorer as it performs poorly with Banner 9.
- We are not using production today! We will use the TEST instance and you won't see any of your normal files today—don't worry, your files are still in production. The index information is in TEST, but not the files.