

WVSOM IT Department BDMS WebXtender Tutorial

## Introduction

The Banner Document Management System (BDMS) is a software application that interfaces with the Banner database system at WVSOM. The BDMS application allows users to scan, index, and upload electronic copies of documents for later retrieval rather than maintain paper copies. The webXtender component of the BDMS system is a simple web-based way of uploading and indexing these scanned documents. The following three steps are required to enter a document into the BDMS system.

- 1. Scan your document onto your local computer.
- 2. Upload your document into the Batch List in BDMS through the webXtender web page. The Batch List is a temporary holding area on the BDMS server used to store the documents until they are indexed.
- 3. Index the document.

## Procedure

The following general procedure describes how to get an electronic document into the BDMS system.

- 1. Scan your document through R.T.I.V. or your preferred scanning software. You will name this scanned document and save it on your computer.
- 2. Log into BDMS through the web browser of your choice (Internet Explorer is preferred).

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- 3. You will be brought to the list of subdirectories (applications) after you log in. In this example the application name is SOM-S-SWC\_SOUTH\_WEST\_REGION. The icons across the top of the screen will navigate to different parts of the webXtender features.
  - a. The Log Out button is allows you to exit the BDMS system. You should always use the log out icon to exit the system.
  - b. The <u>Application List</u> button will bring you back to this screen showing the applications available to the user that is logged in.
  - c. The <u>View/Modify User Settings</u> button allows you to customize some features of your BDMS session.
  - d. The <u>New Query</u> button will take you to another screen where you can enter search criteria to find documents that have been indexed into the BDMS system.
  - e. The <u>Query Results</u> button will take you to a screen showing a list of documents found in your search.
  - f. The <u>Batch List</u> button will take you to a screen listing all documents that have been uploaded but not yet indexed.
  - g. The <u>Batch Import</u> button will take you to a screen that allows you to upload documents to the Batch List from you local computer.



4. Double click on the name of the application to go to the query screen. Your application name will vary depending on which region you are in.

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- 5. The search screen allows you to find indexed documents in BDMS. You may use any combination of indexes (including wild cards) to search for documents. An example of a wild card is the asterisk (\*). To search for all documents with the last name that starts with an H you would type H\* into the last name index and press the Submit button.
- 6. Click on the 'Batch Import' button to begin importing a document to be indexed.

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7. Create a Batch Name for the file you want to upload. This will allow you to identify your document in the BDMS Batch List when you want to index it. Click the 'Next' button.

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8. Click the Browse button to locate and select the file on your local machine than you want to upload into the BDMS system. Click on the 'Upload' button.

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9. The name of your application and Batch name will appear near the top of the screen when the upload is complete. You may or may not see a representation of the pages of your file on the left side of the browser window as shown below. The file is now in the Batch List on the BDMS server and ready for you to index. Click on the 'New' icon 📔 to begin indexing the document.

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10. You can enter the student ID index and move your cursor to another index to auto populate many of the other fields. Many times, you may not have the student ID but you can locate the student ID and other index information through BDMS if you know either the SSN or last name. Type in the

student's last name in the Last Name index field and press the 'Key Reference and Index' Button to have the BDMS system locate index information. If you have previously indexed a document with this information you may need to attach your current document to an existing one as outlined in steps 17-20 below.

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11. Several names may be found in the index search. Click on the 'Select Index' icon intervention in the person you wish to use index information for. This will import the index information to be used to index your new document.

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12. The index information is automatically put in for you.

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13. Enter the Document Type and Term Code indexes from the drop-down menus then click the Save button. This saves the first page of your document that is selected on the left with the index information. The remaining pages are still in the batch list waiting for you to either index them or add them to the first page you just indexed.

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14. You can add the remaining pages to the first indexed page by clicking on the 'Attach All Pages' button. Or you can add any individual page by selecting it from the page list on the left and pressing the 'Attach Current Page' button a.

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15. After clicking on the 'Attach All Pages' button the system asks you to confirm that you want to attach all pages to the first page. Select the Ok button to attach all pages.

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- 16. The following screen will appear when all pages have been attached. This completes the task of indexing a document into BDMS. Skip to step 21.
- 17. The previous steps allowed for the upload of a new document with new index information. There may be cases where you want to attach newly scanned pages to an existing document. The following steps show how to do this.

18. Complete steps 1-10 above to arrive at the indexing screen.

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19. Type in the student's first and last name in the appropriate index fields. Click the 'Select Indexes'

button button for previous documents with index information you may want to use. Search for the row containing the correct student information and press the 'Attach to

Document' button on that row to add the first page of your scanned document to the end of this existing document.



20. You can then click the 'Attach All Pages' button 🛍 to attach the remaining pages to the end of the existing document.

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21. You can Logout by pressing the 'Log Out' button 🚣. You should always use the 'Log Out' button to exit the BDMS system.

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