

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).

Access to BDMS is controlled by your login to My Portal. You are not required to learn a new id and password.

Document Organization – Very Important

Student documents will be stored or "indexed" using the student's CWID (Campus Wide Identification Number) and a document type. Document types have been pre-defined and will be selected from a list. A couple of examples are "Other College Transcript", "High School Transcript" and "Petition". <u>Each student can have only one BDMS document for each document type, such as Petition</u>. However the student's Petition BDMS document may contain multiple scanned petitions. It is most likely that a student will have multiple BDMS document types, such as on titled Petitions, one titled Other College Transcripts, etc. Here is a list of all the document types defined to be used with student data:

Document Input

Document scanning will take place in a central location in Admissions and Records at each college. All forms to be scanned will be marked with the student's CWID prior to scanning. Documents can be scanned one at a time and then indexed or in a batch of multiple documents and indexed after the batch is scanned.

BDMS can also be used to store and attach other types of documents such as pdf, MS Word documents and jpg images (or photos). These other documents do not need to be scanned if they are already in a machine readable format.

Document Viewing

There are two options for viewing documents:

- 1. Clicking on the Banner Document Management System link under Banner Applications on the Banner tab.
- 2. Selecting the BDM view icon from an Internet Native Banner (INB) form.

AB540 FORMS ACADEMIC RENEWALS ADD/DROPS ADVANCED PLACEMENTS AUDIT CERTIFICATE OF COMPLETIONS DSS. EDGOAL EDUCATIONAL GOAL SHEET EOPS FILES EVALUATIONS EXCESS UNITS GRADE CHANGES GRADUATION APPLICATIONS HIGH SCHOOL PERMISSION LETTERS HIGH SCHOOL TRANSCIPTS IFP IGETCS/CSU CERTS INCOMPLETE CONTRACTS INTERNATIONAL LATE ADDS/LATE DROPS MISC MISCELLANEOUS NAME CHANGES OTHER COLLEGE TRANSCRIPTS P/NP PETITIONS RDOC RESIDENCY DOCUMENT REPEATS RESIDENCE RECLASSIFICATIONS SPECIAL PROJECT FORMS SSN CHANGES SUBPOENAS SUBSTITUTIONS TIME CONFLICTS VETERAN RECORDS

> Pre-defined Student Document Types

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VIEWING DOCUMENTS

Using Banner Tab Link

From My Portal a user can go to their Banner tab and then select Banner Document Management System.

The web version of BDMS will open in a pop-up window which can be closed using the X in the lower right corner.

Approval Alerts	ZOFX	Banner Applications	Finar
You have no documents pendin	g approval	Internet Native Banner Open a PROD INB session in a new window	Creat Check
Banner Training		Banner Self-Service Open the web services main menu	Cour
Interactive web training session for Banner software component: URLs below for the training sess view. It will loaded within your L <i>Hash Player is required</i>	s are now available s. Click on any of the ion you would like to uminis window. <i>Note:</i>	Banner Reports View, search, and print output from Banner jobs and processes	Q
For user instructions click HERE.		Banner Document Management System <	
Banner Fundamentals		documents	>
💌 Finance 🖗 Financial Aid 💑 Human Resources		Active Division Course reporting and analysis by department	

All student documents are stored in B-S-ID – BANNER STUDENT COMMON which in the world of BDMS is called an application. Clicking on the second icon from the left (under Edit) will take you back to this view. BDMS referrers to this view as the Application List. Each folder icon represents a different application.

Each folder/application/file cabinet under PROD is called contains different documents and you must select the correct application to find the data you are looking for. Starting July 10, 2011, new documents being entered into BDMS will be stored in the appropriate B-S folder. Documents brought over from earlier imaging systems are stored in the appropriate STARRS-CONV... folder.

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a contract la	B-S-SECT - BANNER CATALOG / COURSE SE	
	STARRS-CONV-INSTRUCTOR-DOCS-REJECT STARRS-CONV-INSTRUCTOR-RECORDS	
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	a new windo×	NB session

Application Name	Description
B-S-ID – BANNER STUDENT COMMON	Where all student-related documents entered after the July
	10, 2011 Go-Live date, are stored.
B-S-SECT-BANNR CATALOG/COURSE SECTION	Where all catalog/course-related documents entered after
	the July 10, 2011 Go-Live date, are stored.
STARRS-CONV-INSTRUCTOR-DOCS-REJECT	Where instructor related documents that did not convert
	cleanly are stored
STARRS-CONV-INSTRUCTOR-RECORDS	Where converted instructor related documents are stored
STARRS-CONV-STUDENT-DOCS	Where converted student related documents are stored
STARRS-CONV-STUDENT-DOCS-REJECTS	Where student related documents that did not convert
	cleanly are stored

Important: If your search of one Application Folder doesn't produce the document you are looking for, you will need to search the other Application Folders that may contain the document.

Right Clicking on Application Folder

BDMS is designed for a PC and most functions can be accesses by clicking the right button on your mouse. Then move the cursor to the function that you want click as you normally do (with the left button). To right-click on a Mac hold down the Control key and click. The following functions are available by placing your mouse on the application/folder/file cabinet you want to access and right clicking:

Options	Use
New Query	Will bring up the query options for the selected application
New Cross App Query	Allows you to query two applications at the same time. (Not
	currently supported)
New Document	Allows you to save a new document via one of 6 options
Properties	Information only
Set As Active Application	For student data the B-S-ID – BANNER STUDENT COMMON
	application should be bold to indicate it is the Active
	Application. Use this to change or re-set the Active
	Application
Reports	Not available

Searching for a Document

There are several ways to initiate a search. You can right-click on the Application Folder, click the search icon (third from left on top tool bar) of select from the View drop-down menu. The search view will display where you can enter the criteria you wish to search on. Note that each Application Folder contains different criteria that are searchable. After entering the search value click on submit at the bottom of the screen to view the results. Below is a screen shot of the B-S-ID – BANNER STUDENT COMMON Application Folder query screen:

	y Criteria for Applicatior	-'B-S-ID' Cu	rrent Query: New Query 🔄
Show	Index Name	Search Value	
1	ID		40
1	PIDM		A 🖸
•	DOCUMENT TYPE	*	9
1	LAST NAME		A 🖸
7	FIRST NAME		A 🖸
•	SSN		40
2	BIRTH DATE		a 🗖
7	TERM CODE	*	×
•	ROUTING STATUS	*	
1	ACTIVITY DATE		40
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Query	/ Options		
Show	all documents 📩		
I In	clude previous document revi	sions	
Save	Options		
Query	Name	[1	
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Query Screen for STARRS-CONV-STUDENT-DOCS:

	Y GITCETTE TOT Application	T STARRS-GONY-STUDENT-DOGS	Current Query, Mew Query
ihow	Index Name	Search Value	
7	CWID		4
V	LAST NAME	1	a 🗸 🖸
V	FIRST NAME		4 0
1	MIDDLE		40
7	BIRTHDATE	[🚅 🖸
2	DOCUMENT TYPE		40
5	YEAR/TERM		40
v	DESCRIPTION		40
₽	SCHOOL CODE		40
Juer	y Options		
Show	all documents 💌		
	nclude previous document revi	sions	
iave	Options		
Query	/ Name		
E A	vailable To All Users		

Query Screen for STARRS-CONV-STUDENT-DOCS-REJECTS:

Note that these documents are indexed by the students social security number, name, and birth date.

At the time of the conversion there was no matching CWID.

quo.	y criteria foi Application	TatAKKa-GOWY-alubent-boga-kejegta	Suitent Query. [New Query _
Show	Index Name	Search Value	
V	SSN		
5	LAST NAME		40
•	FIRST NAME		" [
2	MIDDLE		A [0
V	BIRTHDATE		A 10
•	DOCUMENT TYPE		<i>4</i>
•	YEAR/TERM		<i>x</i>
1	DESCRIPTION	[]	40
V	SCHOOL CODE	Γ	40
Query	y Options		
Show	all documents 💌		
□ In	clude previous document revi	sions	
Save	Options		
Query	Name		

From INB Form

To view the BDMS documents associated with a student, you can use a Banner form such as SPAIDEN, to select the student by name or CWID. Once the student's name and ID display, you can use either of the two BDMS button on the top of the form to open a new window or tab with the

Uracle Developer Forms	Runtime - Web: Upen > SPAIDEN	
<u>File Edit Options Bloc</u>	* Item Record Query Tools Help	-
	8 9 7 7 8 8 8 4 8 4	
🧟 General Person Ident	tification SPAIDEN 8.2 (PROD) 30000000	************************************
ID: 1	BDMS -Display Document	⁴Add Document Generate ID: 🔮
Current Identification	Alternate Identification Address Telephone	Biographical E-mail Emerger
ID:	Name Type:	

The system will display a list of BDMS documents stored for the selected student.



In the example above, there are three document types, Advanced Placements with one page, Academic Renewals with one page and Miscellaneous with two pages. Click on the document icon to the left of the listing to display the document image(s).

If a document you expect to see is not displayed, you will need to check the other Application Folders:

- 1. Click on the Application List icon to display the list of Application folders
- 2. Right click on the folder which you want to search, move your mouse over New Query and click to display the list of search criteria.
- 3. Follow the instruction on page 3 on Searching for a Document.



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To view the thumbnail images, use the View drop-down menu or click on the right most icon. To include the index in your display, use the drop-down View menu or click on the icon to its left

File View	Description	Dama II	14
		Page H	

Use the Page drop-down menu or Page Back and Page Forward icons to view the two pages in this document. Use the Document drop-down menu or Document Up and Document Down icons to view the other documents for this student.



When View with Index is turned on, the display will look like this:

File View Docu	ment Page Help	BDMS O window	pens in a nev in your brows	v tab or ser.
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Index Name	Field Value	Button	Function	
ID	1	Dre	Shows or hides	
PIDM	29			R. Contraction
DOCUMENT TYPE	MISC MISCELLANEOUS		Shows or hides	Page 1
LAST NAME				-
FIRST NAME	SUSAN	b .6	Shows or hides	· Sectore
SSN	****		Workflow Client	
BIRTH DATE	23-Jul-		Document Man been added thre	Automatical and a second a
TERM CODE		-	Shows or hides	Page 2
ROUTING STATUS		- 33	Shows of muss	roge z
ACTIVITY DATE	2011-07-27 11:52:24		Creates a new	
Only users	with Write Permission	ify 🛛	offered a non	
will see the	Modify button		Runs the select -	

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ApplicationXtender Web Access Icons

Button	Description
	Click to return to Application view. Note that after returning to Application view, you can redisplay the results from the previous query in Application Query Results view by selecting View>Query Results,
	Click to access Query view for the selected application and set up a new query. Note that you must run at least one query during a session for this button to be available.
	Click to access Batch List view.
1	Click to access Batch Import view.
	Click to print documents selected from the result set.
	Click to export COLD documents selected from the result set.
	Click to perform a text search on documents selected from the result set.
2	Click to delete documents selected from the result set.
	Click to e-mail documents selected from the result set.
	Blue page This is the latest version of the document.
ĝ,	Log out of ApplicationXtender Web Access.
	Display Application Query Results for the most recently run query for the selected application (if any).
	Return to previous document.
al.	Go to next document, if any.
	Display Index view for the current document.
9	Display the previous page.
Page 1	Select a page to view.
-	Display the next page.

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File Document View 🚺 Page 🚺 😝 Previous Page Previous Document Applications 9) Add Page... 📥 Next Page Next Document New Query 2) Delete Page... R Logout Query Results Navigate To Page 0 Show Version Submit Full Text Job. 😝 Previous Subpage Delete... = Next Subpage ApplicationXtender Web R Check Out... Test View Access - Drop-down Menus Copy or Move Pages Printer Friendly View... -Enable Scanning A Revision History Properties Reorder Page T . Move to First Mail Document... Move Up Merge PDF for Print.. Move Down Move to Last

ApplicationXtender Web Access Drop-Down Menus

SCANNING DOCUMENTS

Getting Started

Scanning will be performed on a PC/Windows system. The user must log into the system with the user name "BDMS" and the password provided by your supervisor. This will link the PC to BDMS. On the desktop you will see two short cuts.

• "Document Management" is used to scan a one document at a time and to index all documents including those scanned as a batch using Image Capture.



• "Image Capture" is used only to scan batches of documents and will be covered under Batch Scanning.

Clicking on the shortcut will take you into ApplicationXtender Document Manager. This program will be used to scan in documents. On the left, the file (cabinet) titled B-S-ID – Banner Student Common should be in bold. This is where all student documents will be stored.



Setting up the Scanner

1. Adjust the scanner settings using the drop-down <u>Scan</u> menu.



- 2. Resolution should be 150 unless the page is especially poor quality
- 3. Mode should be 256-level grey unless color is absolutely needed
- 4. Paper Size is almost always Letter (8 1/2" x 11")

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- 5. Choose Rotation-Front and Rotation-Back as needed to make sure the scanned pages are oriented properly. Rule-of-Thumb: the scanned image you see at scanning time is what will be seen via Banner. Banner users will be able to magnify pages but not necessarily able to spin pages
- 6. Configuration Driver Configuration is where to adjust Contrast and Brightness

Button	Function
3	Begins a scanning session. If a document is displayed in Document Display view, AppXtender Document Manager creates a new <i>page</i> . If no document is displayed, AppXtender Document Manager creates a new <i>document</i> .
2	Repeats the previous scan.
袖	Enables auto feed mode. In auto feed mode, AppXtender Document Manager scans all of the pages in the feeder and then ends the scan session.
3	Enables manual feed mode. In manual feed mode, AppXtender Document Manager scans all of the pages in the feeder and then waits for you to add more pages to the feeder. If you do not add more pages before the scan session times out, the session ends.
3	Enables single feed mode. In single feed mode, AppXtender Document Manager scans only one page at a time. After each page is scanned, you must click the Scan button again to scan the next page.
·	Configures the automatic rotation of images as they are scanned.
= *	Configures the automatic rotation of images as they are scanned.
2.	Displays a shortcut menu so that you can configure scanning.
-	Enables or disables automatic enhancement of images as they are being scanned.

ApplicationXtender Document Manager Scan Toolbar Buttons

In addition to these buttons, the Scan toolbar also has four drop-down lists. These lists allow you to change the following settings for the images that you scan:

- DPI resolution setting
- Color
- Page size
- Scanner source

De Anza

- 1. Set up the scanner for flatbed mode
- 2. Put the piece of paper onto the flatbed, up against the top left corner

Foothill

- 1. Make sure the scanner driver in use is the "ISIS Fujitsu fi-4530C" driver
- 2. Go to Scan Configuration Select Scanner via the menu tree
- 3. Select the ISIS driver it's about 1/3 of the way from the top of the list. NOTE: Testing has found that BDMS works much better with the ISIS driver than with the WIA driver at the bottom of the list of drivers
- 4. Source: To scan only one side, choose ADF Simplex. To scan both sides, use ADF Duplex
- 5. Choose Rotation-Front and Rotation-Back as needed to make sure the scanned pages are oriented properly.
- 6. Feed: Leave on Auto as a rule

IMPORTANT CONCEPT: Be aware if you are scanning a new *document* or a new *page* into a *document*. Documents are made up of one or more pages. You must tell the system that you are scanning a new document. Other wise the additional pages scanned will be added to the current document.

Scanning and Indexing One Item at a Time

- 1. Load the document in the scanner.
- Click the New Document button (the yellow folder beneath the "View" menu choice), choose "Scan", and click OK >> OR

Choose Document – New – Scan from the menu tree

- 3. The piece of paper will be scanned and will display on the screen
- 4. Enter the ID of the student and hit Tab
- 5. Make sure the Student Name matches the name on the document
- 6. Choose the appropriate Document Type from list.
- 7. Choose the appropriate Term Code
- 8. Click Save at the bottom of the screen.
- 9. If you get the error message "A document with the same unique key already exists ", that means that the student already has a BDMS document of that document type. You must locate that document and add the new pages to it. These instructions can be found on page x of this guide.

Button	Function
20	Shows or hides the Application view.
	Shows or hides the Query view for the current query.
X	Shows or hides the Workflow Workbox. This toolbar button is available only when ApplicationXtender Workflow Client is installed on the AppXtender Document Manager workstation and the button has been added through the Customize Toolbar dialog box.
44 44	Shows or hides the Thumbnail view.
	Creates a new document.
Da.	Runs the selected query.
Di.	Begins a new query on the active application.
P	Opens the New Cross Application Query dialog box so you can configure a new query that searches across multiple applications.
8	Depending on how the Print feature is configured, prints either the currently displayed document or the currently displayed page. Note: If the Print configuration is set to Prompt, when you use the Print toolbar button to print, regardless of which option you select from the Print dialog box, only the currently displayed page will print.
¥	Cuts the displayed page to the Windows Clipboard.

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- 10. At this point you have created a BDMS Document containing one scanned page. To scan the next Document, repeat steps 1 through 10.
- 11. If you want to add a page to the current document, select **Page** Menu Scan New. You now have three options: "Insert Before" (page displayed), "Insert After" (page displayed) or "Append" (add as last page of document).

Indexing Scanned Documents

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To retrieve a BDMS Document for deletion or to add/delete pages

- 1. Right-click on the appropriate BDMS Application and choose New Query, or right-click on an existing query and choose Edit Query
- 2. Enter the query information needed to retrieve the Document you want and then click Search
- 3. If only one Document is retrieved, it will display on the screen. If multiple Documents are returned, a list will display. Double-click on the Document in the list
- 4. To delete this entire Document from BDMS, use the Document Delete menu item
- 5. To delete pages from this Document, make active the page you want to delete and choose Page Delete from the menu
- 6. To add pages to this Document, use the Page New Scan menu items. Place the new page as appropriate via Insert Before, Insert After, or Append
- 7. If you reorder pages within a Document, you will need to create a new version of the Document and then remove the old version:
 - 7.1. Go to Scan New Version Current View to create a new version of the Document.
 - 7.2. Go to Scan Purge Version to remove the old version of the Document

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Adding Items to an Existing BDMS Document

ApplicationXtender allows you to search for index information from existing documents and append pages to previously indexed documents. The Attach feature allows you to choose an existing document from a result set and add a new page to the existing document. To append a new page to an existing document:

- 1. From the Document menu, select New and then select an input option from the submenu to create a new document. AppXtender displays the Index view.
- 2. Enter data in one or more of the index fields, and then press [F4] to initiate a search for documents that meet the specified criteria. The AppXtender Result Set appears, listing the results.
- 3. Select the index record and click Attach. The new page is added to the existing document that you selected.

De Anza - To scan multiple pieces of paper as a single BDMS Document into the B-S-ID Application (cabinet):

- 1. Set up the scanner for flatbed mode
- 2. Put the first piece of paper onto the flatbed, up against the top left corner
- 3. Click the New Document button (the yellow folder beneath the "View" menu choice), choose "Scan", and click OK >> OR <<
- 4. Choose Document New Scan from the menu tree
- 5. The piece of paper will be scanned and will display on the screen
- 6. Enter the ID of the student and hit Tab
- 7. Make sure the Student Name matches the name on the document
- 8. Choose the appropriate Document Type
- 9. Choose the appropriate Term Code
- 10. Click Save at the bottom of the screen.
- 11. Put the next piece of paper of the Document onto the flatbed, up against the top left corner
- 12. Hit Ctrl-S >> OR << Choose Scan Scan Page from the menu tree
- 13. At this point the next page has been added to the Document. To continue adding pages to this Document, repeat steps 9-10 as needed

Adjusting Scanned Documents' Quality and Orientation

- 1. Place the pages into the scanner.
 - a. For Portrait pages, put Page 1 face down and upside down, with subsequent pages in order and oriented the same way
 - b. For Landscape, control rotation via the Scan Rotation-Front and Rotation-Back settings (see 2e above)
- 2. Click the New Document button (the yellow folder beneath the "View" menu choice), choose "Scan", and click OK >> OR << Choose Document New Scan from the menu tree
- 3. The paper(s) will be scanned and the image(s) will display on the screen. Use the page buttons (the arrows in the boxes two rows beneath the "Annotate" menu item) to cycle through the pages
- 4. IF the images are of not sufficient quality, choose Document Delete to erase the scans, reset the scanner via the steps in (2) above as needed, and rescan per steps 3 5.
- 5. IF the images are satisfactory, index the images by entering the ID of the student and hitting Tab
- 6. Make sure the Student Name matches the name on the document
- 7. Choose the appropriate Document type
- 8. Click Save at the bottom of the screen

- 9. At this point you have created a BDMS Document containing the image(s) you scanned. You can delete individual pages, change page order, etc. via the Page menu items
- Once you are satisfied with the BDMS Document, close it by clicking the grey "X" just below the Red "X" at the top right. DO NOT click the Red "X"; this will exit you completely from Document manager
- 11. Repeat steps 1-10 for each BDMS Document you want to create.

Scanning Multiple Items at a Time

Foothill - To add pages to an already-existing BDMS Document:

- 1. Retrieve from BDMS the Document to which you want to add pages by:
 - a. Right click on the B-S-ID Application at the left of the screen, and choose New Query, or click on an existing Query and choose Edit Query
 - b. Enter the information into the Query screen needed to retrieve the Document you want
 - c. If your Query retrieves only one Document, it will automatically open. If your Query returns more than one Document, a list of Documents will be presented. Double-click on the Document you want to open.
- 2. Adjust the scanner as needed for your new pages
- 3. Choose drop-down menu: Page New Scan Append to add the new pages at the end of the Document
- 4. Your pages will be scanned and added automatically to the Document. No Save is needed.
- 5. You can delete individual pages, change page order, etc. via the Page menu items
- 6. Once you are satisfied with the BDMS Document, close it by clicking the grey "X" just below the Red "X" at the top right.
- 7. DO NOT click the Red "X"; this will exit you completely from Document Manager

To create a batch of scanned pages which can then be indexed as BDMS Documents:



- 1. Open Image Capture using the shortcut on your desktop. Log into the "Image Capture" software using your MyPortal ID and password
- 2. At De Anza, set the scanner to Flatbed via the Scan menu. We cannot depend on the document feeder working dependably. At Foothill, set the scanner per the

instructions in the Creating a New BDMS Document section.

- 3. Create a new Batch
 - Right-click on the BDMS Application into which Documents will be placed, and choose New Batch
 - Click View Applications to display the list of Applications
 - Use a local naming convention to give unique names to batches, recognizing that multiple people may be accessing the batch list at any one time
- 4. De Anza Place a piece of paper onto the flatbed and hit Ctrl-S to scan it. Foothill you can set the feeder to Auto, meaning when you hit Ctrl-S all the papers will scan. Alternately, you can set the feeder to Single, meaning each time you hit Ctrl-S one sheet will feed & scan per your scanner setup items.
- 5. Repeat step 4 as needed to scan your entire set of papers to scan
- 6. If you scan a page and want to remove it from the batch, hit Ctrl-X OR use Page Delete from the menu
- 7. Once the batch is completely scanned and ready to index, use the File Close menu item to close the batch.
- 8. Exit the Image Capture Software.

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To index a batch of un-indexed batches of scanned documents:

- 1. Log into the Document Manager software using your MyPortal ID and password.
- 2. Make sure to make active the correct BDMS Application into which the batch's scans will be saved as Documents
- 3. Choose Utilities Batch Index (List) to bring up a list of eligible batches ready for indexing.
- 4. Select the batch you want to index and then click Index
- 5. The first scanned image in the index will display. Click on the New Document icon the first icon in the third row of icons, under the File menu. The Index window will open.
- 6. Enter the ID of the student and hit Tab
- 7. Make sure the Student Name matches the name on the document
- 8. Choose the appropriate Document Type
- 9. Choose the appropriate Term Code
- 10. Click Save at the bottom of the screen.
- 11. In the dialog box "Would You Like To Add More Indexes", click No
- 12. At this point you have created a BDMS Document containing one image. If you want to add additional images to this Document, use the Attach page icon (third row of icons, second icon) for each additional page.
- 13. Once you are finished with this Document and want to create a new Document, repeat steps 5 11 as needed.
- 14. Once the last image in the batch has been indexed, a dialog box will display asking if you want to index a new batch. Proceed accordingly.
- 15. Note that individual pages can be deleted from a batch via the Page Delete menu item OR via the small Red "X" icon next to the New Document & Attach Page icons

Setting Up your screen for scanning

To display thumbnail images of documents in the queue, select from the "Main" Toolbar "User Settings", select "Document View" from the menu on the left side, deselect the first option "Show Page Thumbnails".

Copying Existing Index Information

ApplicationXtender allows you to search for index information from existing documents and copy the existing index information to populate the new document's index. The Copy Index feature allows you to choose an existing document from a result set and copy the existing index information to the new document.

To copy index information to a new document:

- 1. From the Document menu, select new and then select an input option from the submenu to create a new document. The Index view displays.
- 2. Enter data in one or more of the index fields, and then press the {F4} function key to initiate a search for documents that meet the specified criteria. A list of results will display.
- 3. Select an index record and click Copy Index. The index information from the existing document that you selected appears in the new document's Index View.
- 4. If needed, make changes to the index information.
- 5. Click Save.

Copying the Previous Index information

If you are adding a series of documents and entering similar index information, such as term, for the entire series, the Copy Previous Index Info feature may help you to save time and avoid mistakes.

To copy the previous index information:

- 1. Add the first document in the series. Enter index information and click Save.
- **2.** Add the next document in the series. Select one of the index fields and press {F9}. The index fields are populated with the same information as the previously indexed document.
- **3.** If necessary, make changes to the index information.
- 4. Click Save.
- 5. Repeat steps 2-4 for each additional document in the series.

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Toolbar Buttons

<u>Main Toolbar</u>

Button	Function
D¢,	Shows or hides the Application view.
	Shows or hides the Query view for the current query.
8	Shows or hides the Workflow Workbox. This toolbar button is available only when ApplicationXtender Workflow Client is installed on the AppXtender Document Manager workstation and the button has been added through the Customize Toolbar dialog box.
33 33	Shows or hides the Thumbnail view.
Ø	Creates a new document.
D.	Runs the selected query.
Di.	Begins a new query on the active application.
P	Opens the New Cross Application Query dialog box so you can configure a new query that searches across multiple applications.
8	Depending on how the Print feature is configured, prints either the currently displayed document or the currently displayed page. Note: If the Print configuration is set to Prompt, when you use the Print toolbar button to print, regardless of which option you select from the Print dialog box, only the currently displayed page will print.
*	Cuts the displayed page to the Windows Clipboard.

Button	Function
	Copies the displayed page to the Windows Clipboard.
8	Creates a new document from the Windows Clipboard or adds a new page to the displayed document from the Windows Clipboard.
#9	Performs a text search on the currently displayed document.
*	Opens the AppXtender Configuration dialog box.
	Vertically tiles multiple documents in Document Display view.
B	Horizontally tiles multiple documents in Document Display view.
7.50 × 9.00 m	Cascades multiple documents in Document Display view.
	Maximizes the Document Display view and any open toolbars to fill the entire screen. If the Index view and the Thumbnail view are open, they will appear along with the Document Display view. Note: Once in full-screen mode, if available, you can use the toolbar buttons to show the Application view, the Query view, or both.
æ	Opens the Select Scanner dialog box.
2	Scans a new document into the active application.

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Batch Indexing Toolbar

ApplicationXtender Document Manager Batch Index Toolbar		
Button	Function	
省	Creates a new document and attaches the current page in the batch to the new document.	
¢B	Attaches the current page in the batch to the current document.	
0 ^D	Attaches all pages in the batch to the current document.	
×	Deletes the current page from the batch or the current document.	
1	Displays the previous page in the batch.	
Ð	Displays the next page in the batch.	

Scan Toolbar Buttons

Button	Function
3	Begins a scanning session. If a document is displayed in Document Display view, AppXtender Document Manager creates a new page. If no document is displayed, AppXtender Document Manager creates a new document.
23	Repeats the previous scan.
*	Enables auto feed mode. In auto feed mode, AppXtender Document Manager scans all of the pages in the feeder and then ends the scan session.
3	Enables manual feed mode. In manual feed mode, AppXtender Document Manager scans all of the pages in the feeder and then waits for you to add more pages to the feeder. If you do not add more pages before the scan session times out, the session ends.
3	Enables single feed mode. In single feed mode, AppXtender Document Manager scans onl one page at a time. After each page is scanned, you must click the Scan button again to scan the next page.
- 11	Configures the automatic rotation of images as they are scanned.
= •	Configures the automatic rotation of images as they are scanned.
8.	Displays a shortcut menu so that you can configure scanning.
12	Enables or disables automatic enhancement of images as they are being scanned.

In addition to these buttons, the Scan toolbar also has four drop-down lists. These lists allow you to change the following settings for the images that you scan:

- DPI resolution setting
- Color
- Page size
- Scanner source

Imaging Toolbar Buttons

Button	Function
\$	Displays the selected view of the current page (rotated, enlarged, reduced, fit top to bottom, fit left to right) in the Document Display view.
	Fits the displayed page in the Document Display view.
1	Fits the displayed page in the Document Display view from top to bottom.
0	Rotates the displayed page 90° to the right in the Document Display view.
۶	Zooms in so the image in the Document Display view appears larger.
Q	Zooms out so the image in the Document Display view appears smaller.
Д	Opens the Magnifier window.
2	Displays the previous page of a multipage document
D	Displays the next page of a multipage document.
ø	Displays the previous version of the page in the Document Display view.
B	Displays the next version of the page in the Document Display view.
A	Shows the text or the image for the displayed document.
A	Performs optical character recognition (OCR) on the displayed page.
Ð	Switches the Document Display view between pan mode and selection mode.
₩ •	Shows or hides Index view.
. •	Shows or hides form overlays on COLD/ERM documents.
۹	For ICE format pages, displays the previous subpage. This button is available only if it has been added through the Customize Toolbar dialog box.
	For ICE format pages, displays the next subpage. This button is available only if it has been added through the Customize Toolbar dialog box.

Annotation Toolbar Buttons

Button	Function
4	Allows selection of annotations (toggle).
Ē	Creates a text annotation.
8	Creates a highlight annotation.
9	Creates a freehand line annotation.
1	Creates a straight line annotation.
1	Creates an arrow annotation.
	Creates a rectangular annotation.
0	Creates a rounded rectangular annotation.
0	Creates an oval annotation.
A	Creates a polyline annotation.
D	Creates a polygon annotation.
0	Erases the annotation.
A	Creates a filled or hollow annotation (toggle).
B	Creates an annotation with redaction (toggle).
•	Selects the default annotation group.
~	Selects all annotations.
6	Moves the selected annotation in front of another annotation.
	Sends the selected annotation behind another annotation.
· 1	Shows or hides annotations (toggle); allows you to hide annotations by annotation group.
•	Selects line width.

Button	Function
	Creates a rectangular annotation.
	Creates a rounded rectangular annotation.
0	Creates an oval annotation.
R	Creates a polyline annotation.
D	Creates a polygon annotation.
0	Erases the annotation.
A	Creates a filled or hollow annotation (toggle).
B	Creates an annotation with redaction (toggle).
•	Selects the default annotation group.
~	Selects all annotations.
đ	Moves the selected annotation in front of another annotation.
1	Sends the selected annotation behind another annotation.
. 6	Shows or hides annotations (toode): allows vou to hide annotations by annotation group.
= -	Selects line width.
P -	Selects annotation colors.
×	Deletes the selected annotations.
	Saves all annotations.
n	Cancels annotation changes.
•	Adds the selected rubber stamp annotation to a page.