

ellucian™

---

**Banner Document Management Suite  
Indexing Batches in Web Access**

May 2012  
Release 2.0



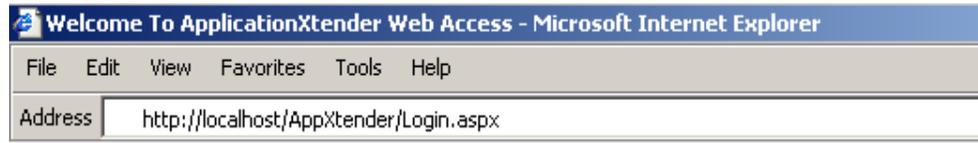
## Table of Contents

<u>Logging into Web Access</u>	<u>3</u>
<u>Logging into Web Access</u>	<u>3</u>
<u>Opening Batch list</u>	<u>4</u>
<u>Selecting Batch to Index</u>	<u>5</u>
<u>Indexing a Document</u>	<u>6</u>
<u>Important Indexing Rules</u>	<u>8</u>
<u>Unique Key Violation</u>	<u>9</u>
<u>Indexing By Last Name, First Name or SSN #</u>	<u>10</u>
<u>Modify an Index</u>	<u>12</u>
<u>Icon Descriptions</u>	<u>14</u>



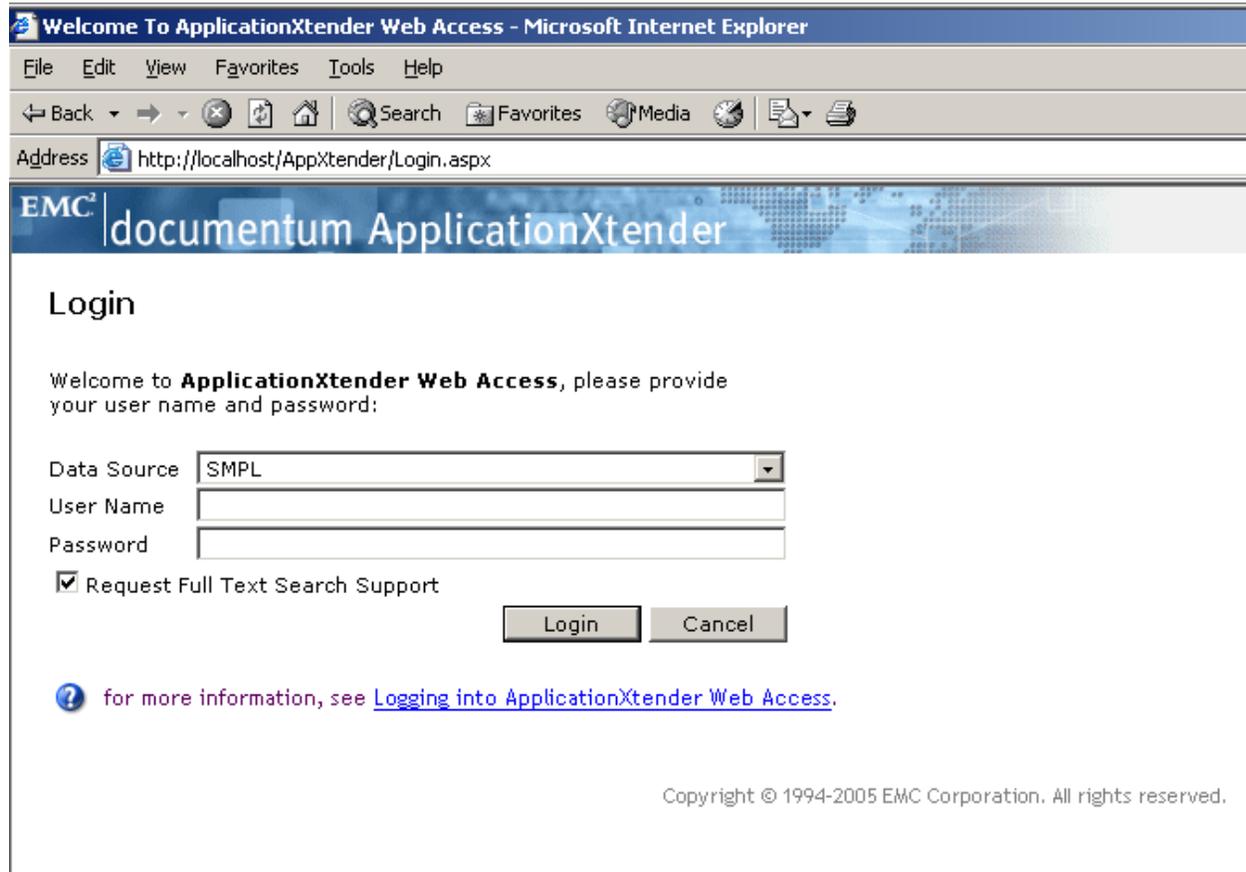
Open Internet explorer.

Enter URL on address line.

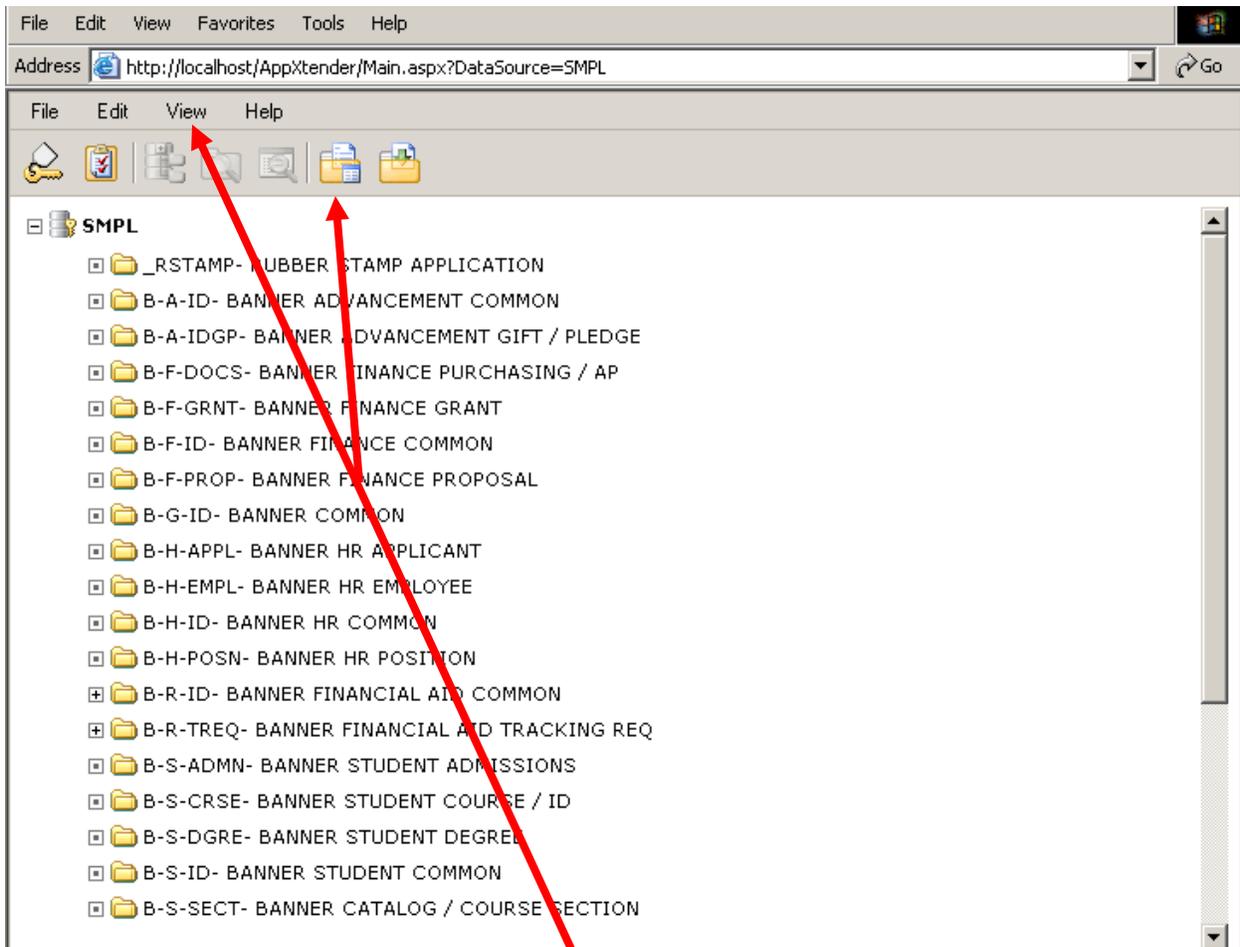


URL

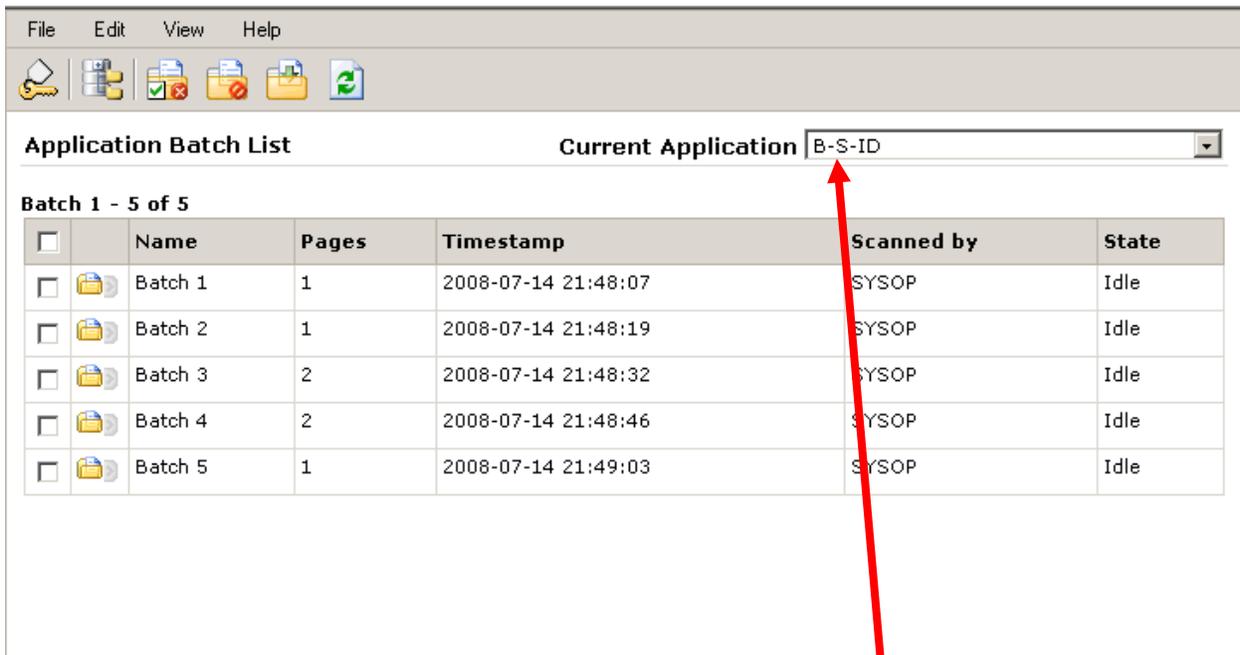
*http://*\_\_\_\_\_ */Appxtender/login.aspx*  
Server name or IP



Enter Banner user name and password.



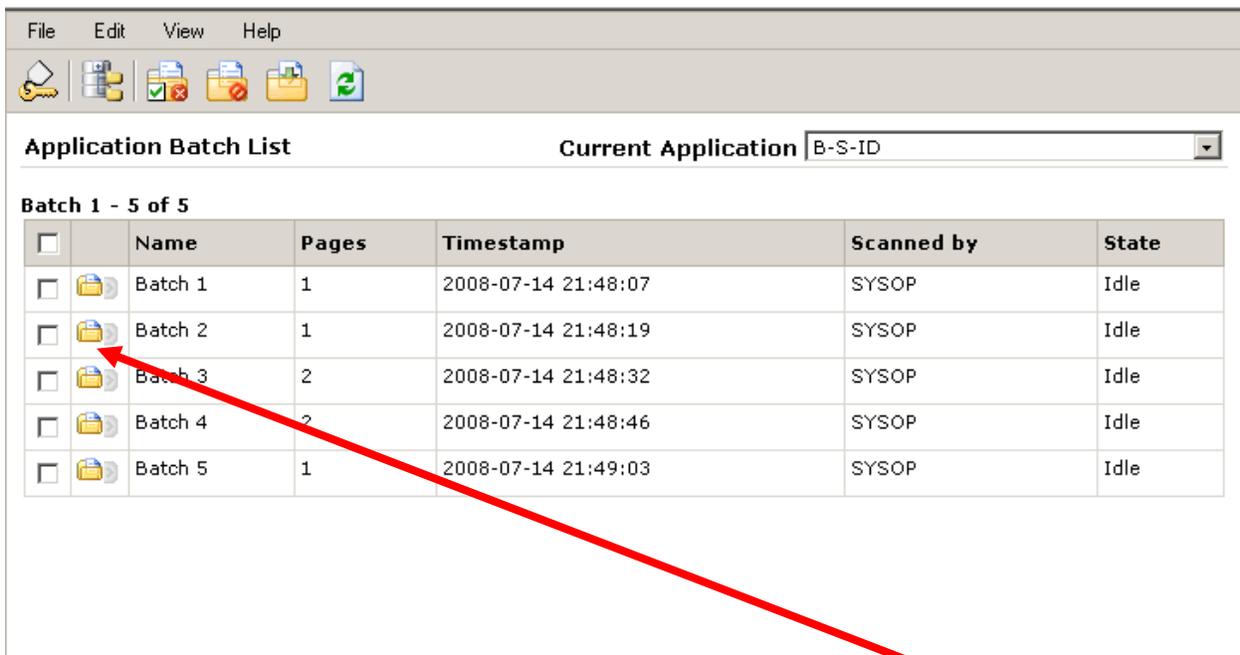
Select "View" or the folder icon then select "Batch List"



The screenshot shows a software interface with a menu bar (File, Edit, View, Help) and a toolbar. Below the toolbar is the 'Application Batch List' section. On the right, there is a 'Current Application' dropdown menu with 'B-S-ID' selected. A red arrow points from the dropdown menu down towards the instruction below. The main area contains a table titled 'Batch 1 - 5 of 5' with the following data:

<input type="checkbox"/>	Name	Pages	Timestamp	Scanned by	State
<input type="checkbox"/>	Batch 1	1	2008-07-14 21:48:07	SYSOP	Idle
<input type="checkbox"/>	Batch 2	1	2008-07-14 21:48:19	SYSOP	Idle
<input type="checkbox"/>	Batch 3	2	2008-07-14 21:48:32	SYSOP	Idle
<input type="checkbox"/>	Batch 4	2	2008-07-14 21:48:46	SYSOP	Idle
<input type="checkbox"/>	Batch 5	1	2008-07-14 21:49:03	SYSOP	Idle

Select the application from the Current Application drop down list



This screenshot is identical to the one above, but with a red arrow pointing from the instruction below to the yellow folder icon next to 'Batch 2' in the table.

<input type="checkbox"/>	Name	Pages	Timestamp	Scanned by	State
<input type="checkbox"/>	Batch 1	1	2008-07-14 21:48:07	SYSOP	Idle
<input type="checkbox"/>	Batch 2	1	2008-07-14 21:48:19	SYSOP	Idle
<input type="checkbox"/>	Batch 3	2	2008-07-14 21:48:32	SYSOP	Idle
<input type="checkbox"/>	Batch 4	2	2008-07-14 21:48:46	SYSOP	Idle
<input type="checkbox"/>	Batch 5	1	2008-07-14 21:49:03	SYSOP	Idle

Left mouse click on the yellow folder next to the batch that you want to index.

The screenshot displays the ellucian document indexing software interface. On the left, there is a form for indexing a document. The form has two columns: 'Index Name' and 'Field Value'. The 'Index Name' column contains the following fields: ID, PIDM, DOCUMENT TYPE, LAST NAME, FIRST NAME, SSN, BIRTH DATE, TERM CODE, APPLICATION NUMBER, ADMISSIONS REQUIREMENT, INSTITUTION NUMBER, ROUTING STATUS, and ACTIVITY DATE. The 'Field Value' column contains input fields for each of these, with the 'ACTIVITY DATE' field containing the value '2008-07-14 22:06:10'. A 'Save' button is located at the bottom right of the form.

On the right, a scanned document is displayed. The document is from 'THE SIEREXE COMPANY LIMITED' and is dated '18th January, 1972'. The document text includes a reference number 'Our Ref. 100/700/646', a recipient address 'Dr. P.S. Cudell, Mining Surveys Ltd., Holmwood Road, Reading, Berks.', and a salutation 'Dear Pete,'. The main body of the document describes the facsimile transmission process, mentioning a photocell, a raster scan, and a video signal. The document is signed 'Phil.' and identified as 'P.J. CROSS, Group Leader - Facsimile Research'. At the bottom of the document, there is a small copyright notice: 'Copyright © 1998, P.J. Cross, All Rights Reserved. P.J. Cross, All Rights Reserved.'

At the bottom of the software window, the status bar shows 'Application: B-S-ADMIN' and 'Page 2 of 60'.

The first document in the batch will be displayed and is ready to be indexed.

File View Batch Help

Index Name	Field Value
ID	258674535
PIDM	30839
DOCUMENT TYPE	SUPPLEMENTAL INFO
LAST NAME	GREEN
FIRST NAME	AVIA
SSN	258-67-4535
BIRTH DATE	13-Oct-1983
TERM CODE	
APPLICATION NUMBER	
ADMISSIONS REQUIREMENT	
INSTITUTION NUMBER	
ROUTING STATUS	
ACTIVITY DATE	2007-11-05 21:51:44

Save

You cannot save data typed into this form. Please print your completed form if you would like a copy for your records.

**THE COMMON APPLICATION** 2007-08 TEACHER  
For Undergraduate College Admission

*To be used by students applying for the Spring 2008, Fall 2008, or Spring 2009 college term of this form. No distinction will be made between this form and a college's own. Please refer to the cover page of the Common Application booklet to complete, copy, and submit.*

**TO THE APPLICANT**

After completing all the relevant questions below, give this form to a teacher who has taught you math, science, or social studies. Please also give that teacher stamped envelopes addressed to:

Birth date \_\_\_\_\_ Social Security Number \_\_\_\_\_  
mm/dd/yyyy

Legal name \_\_\_\_\_  
Last/Firstly (Enter name exactly as it appears on official documents.) First/Last

Address \_\_\_\_\_  
Number and St/Street Apartment # City or Town State/Province

School you now attend \_\_\_\_\_

**IMPORTANT PRIVACY NOTICE:** Under the terms of the Family Educational Rights and Privacy Act, you matriculate UNLESS at least one of the following is true:

Enter the Banner ID # in the first field Then Select the **TAB** key.

The following fields will populate with data from Banner:

**PIDM**

**Last Name**

**First Name**

**SSN**

**Birth Date.**

Select the Appropriate document type for the document being displayed

Then click on **Save.**

Index Name	Field Value
ID	239000000
PIDM	1471
DOCUMENT TYPE	ADMISSIONS APP
LAST NAME	SMITH
FIRST NAME	JOHN
SSN	762-37-3675
BIRTH DATE	22-Aug-1961
TERM CODE	
APPLICATION NUMBER	
ADMISSIONS REQUIREMENT	
INSTITUTION NUMBER	
ROUTING STATUS	
ACTIVITY DATE	2008-07-14 22:18:51

The next documents displays.

**\* THREE IMPORTANT RULES \***

1. If the document is the second page of the previous document, click on the single page green plus.
2. If the document belongs to the same Banner ID # as the previous document, but the Document Type is different then click on the “New Document” icon

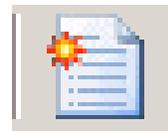


Then:

- 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 “New Document” icon and enter in the new ID and Document Type and then click save.





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.

Click on the “Select Indexes” icon



Document 1 - 1 of 1					
ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	
239000000	1471	ADMISSIONS APP	SMITH	JOHN	

ÉTABLISSEMENTS ABCDEFG  
SOCIÉTÉ ANONYME AU CAPITAL DE 300 000 F  
20, RUE DU XVUTRSTBSL F 00000 NTBCLAG  
Tél. : (35) 24.46.32 Adr. Tg. : NRVLIJROLM  
Télex : 31596 F IN : 718490070257  
Transporteur (ou Transaltaire)  
M. M. DUPONT Frères  
8 quai des bicdfsh F 0000 NTBCLAG

The system will search for existing documents with the same index values

When the index value is displayed

Select the green plus on the page and the present document will append to all previous documents with the same index values.



## Indexing By Last Name, First Name or SSN #

File View Batch Help

Index Name Field Value

ID	
PIDM	
DOCUMENT TYPE	
LAST NAME	
FIRST NAME	
SSN	999-88-7766
BIRTH DATE	
TERM CODE	
APPLICATION NUMBER	
ADMISSIONS REQUIREMENT	
INSTITUTION NUMBER	
ROUTING STATUS	
ACTIVITY DATE	2008-07-14 23:09:31

Save

STABLISSEMENT ASSOCIÉ  
SOCIÉTÉ ANONYME AU CAPITAL DE 98000 \$  
20, RUE DU QUINZE-AOÛT, 9 000 VINCENNES  
TEL : (514) 343-2211 - 10000  
TÉLÉFAX : (514) 343-2211  
10000 VINCENNES  
9 000 VINCENNES

LIVRAISON  
5, rue St-J  
99000 VILLE

DÉCLARATION BANCAIRE DU VENDEUR  
CODE BANQUE CODE GICHER COMPTE CLIENT  
ORIGINE TRANSFERT DESTINATION MOU  
Page 1 Etat 2 At:

MARCHÉS ET NUMÉROS MARKS AND NUMBERS	74,21,456,44,2 A	NOMINÉ BENEFICIAIRE NUMBER 1 DESC	1 Comp
QUANTITÉ COMMANDES ET UNITÉ QUANTITY ORDERED AND UNIT	2 10 25	AP-509 SS-24 2107	Circuit Intég Connecteur Component ind

If Banner ID #is not known, you can index by Last Name, First Name, or SSN#

Enter information into the field and click on the “Key References and Index “icon



File View Batch Help

Document 1 - 1 of 1

ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE
123123003	665		SMITH	CONNOR	999-88-7766	1-Oct-1982

The system will search for the information based on the SSN# that was entered.

Click on the page icon and the field will auto populate with the data.



File View Batch Help

Index Name	Field Value
ID	123123003
PIDM	665
DOCUMENT TYPE	<input type="text"/>
LAST NAME	SMITH
FIRST NAME	CONNOR
SSN	999-88-7766
BIRTH DATE	01-Oct-1982
TERM CODE	<input type="text"/>
APPLICATION NUMBER	<input type="text"/>
ADMISSIONS REQUIREMENT	<input type="text"/>
INSTITUTION NUMBER	<input type="text"/>
ROUTING STATUS	<input type="text"/>
ACTIVITY DATE	2008-07-14 23:46:06

ETABLISSEMENT ARCEBIO  
 SOCIETE ANONYME AU CAPITAL DE 30000 F  
 10, RUE DE VALENTIN P 0000 NTECLAG  
 Tel : 00 34 823 401 73 - N°RCP004  
 Telex : 3106 F IN - TRANSDIST  
 Transporteur (du Telerama)  
 M. M. SLEPOT France  
 8 quat des Moulins P 000 NTECLAG

---

•

LIVRAISON  
 5, rue III2  
 99000 VILLE

---

DECLARATION BANCAIRE DU VENDEUR

CODE BANQUE	CODE GUICHET	COMpte CLIENT

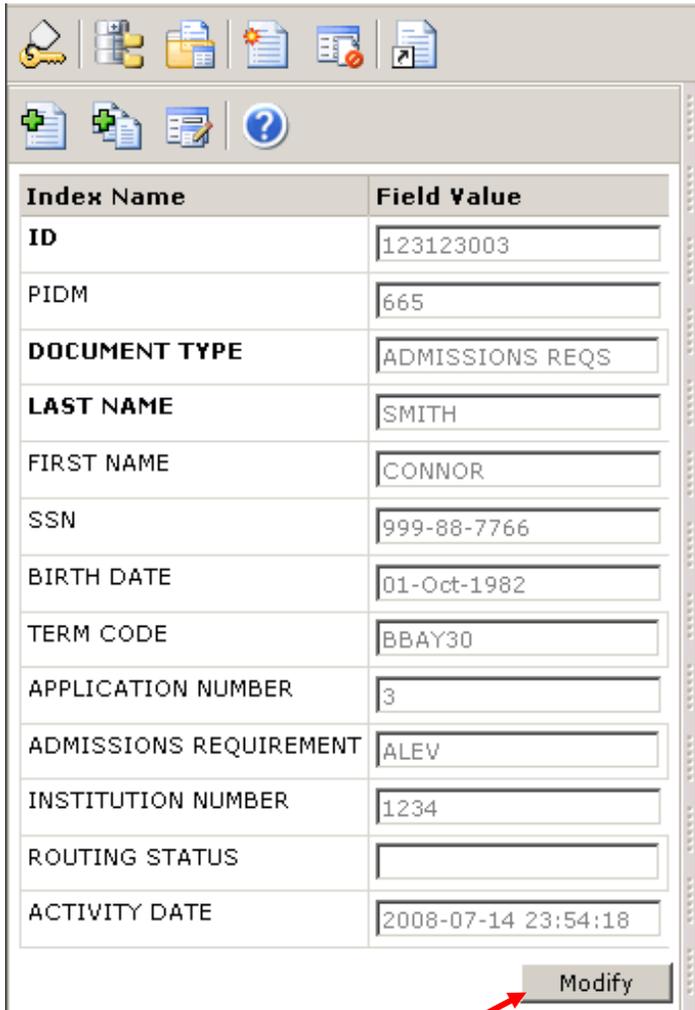
ORIGINE	TRANSPORTS DESTINATION	MOIS
Page 1	Etat 2	At:

MONTANT ET NUMEROS MARKS AND NUMBERS	NOMBRE / DIGNITE NUMBER / DISC
74,21,456,44,2 A	1 Comp

QUANTITE ET UNITE QUANTITY ORDERED AND UNIT	NP ET REF. DE L'ARTICLE	
2	AZ-509	Circuit integ
10	SS-24	Connecteur
25	SS07	Composant ind

Select the document type from the drop down list.

Then click on SAVE



Index Name	Field Value
ID	123123003
PIDM	665
DOCUMENT TYPE	ADMISSIONS REQS
LAST NAME	SMITH
FIRST NAME	CONNOR
SSN	999-88-7766
BIRTH DATE	01-Oct-1982
TERM CODE	BBAY30
APPLICATION NUMBER	3
ADMISSIONS REQUIREMENT	ALEV
INSTITUTION NUMBER	1234
ROUTING STATUS	
ACTIVITY DATE	2008-07-14 23:54:18

Modify

To modify the index data click on the “modify “button

**\* IMPORTANT \***

**Do not click on Modify to index a “new document”**

The screenshot shows a web-based form with a toolbar at the top containing icons for navigation and help. The form is organized into a table with two columns: 'Index Name' and 'Field Value'. The 'ID' field contains the value '123123003' and is circled in red. The 'DOCUMENT TYPE' field is a dropdown menu currently showing 'ADMISSIONS REQS' and is also circled in red. Other fields include PIDM (665), LAST NAME (SMITH), FIRST NAME (CONNOR), SSN (999-88-7766), BIRTH DATE (01-Oct-1982), TERM CODE (BBAY30), APPLICATION NUMBER (3), ADMISSIONS REQUIREMENT (ALEV), INSTITUTION NUMBER (1234), ROUTING STATUS (empty dropdown), and ACTIVITY DATE (2008-07-14 23:54:18). At the bottom of the form are 'Save' and 'Cancel' buttons.

Index Name	Field Value
ID	123123003
PIDM	665
DOCUMENT TYPE	ADMISSIONS REQS
LAST NAME	SMITH
FIRST NAME	CONNOR
SSN	999-88-7766
BIRTH DATE	01-Oct-1982
TERM CODE	BBAY30
APPLICATION NUMBER	3
ADMISSIONS REQUIREMENT	ALEV
INSTITUTION NUMBER	1234
ROUTING STATUS	
ACTIVITY DATE	2008-07-14 23:54:18

Save Cancel

The "ID" and "Document Type" fields are the only index fields that can be modified

*Term Code, Application Number, Admissions Requirement, Institutional Number* are defaulted to read only after indexing  
(The read only setting can be turned off these fields)



**LOGOUT**



**VIEW/MODIFY  
YOUR USER  
SETTINGS**



**BATCH LIST**



**BATCH IMPORT**



**APPLICATION LIST**



**DELETE BATCH**



**CHANGE BATCH STATUS**



**REFRESH BATCH LIST**



**SELECT INDEXES**



**KEY REFERENCE & INDEXES**



**AUTO INDEX**



**NEW DOCUMENT**



**VIEW LAST INDEX DOCUMENT**



**ATTACH CURRENT PAGE**



**ATTACH ALL PAGES**



**MODIFY**



**RETURN TO BATCH SCANNING**



**LAST MODIFIED INDEX**



**CLEAR INDEX**

## 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  
                          4 Country View Road  
                          Malvern, Pennsylvania 19355  
                          United States of America

© 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 organization's own choosing.

Ellucian, the Ellucian logo, Banner, Luminis, PowerCAMPUS, fsaATLAS, Matrix, Plus, and PocketRecruiter are trademarks or registered trademarks of Ellucian Data Systems Inc. or its subsidiaries in the U.S. and other countries. All other trade names are trademarks or registered trademarks of their respective holders.