



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.

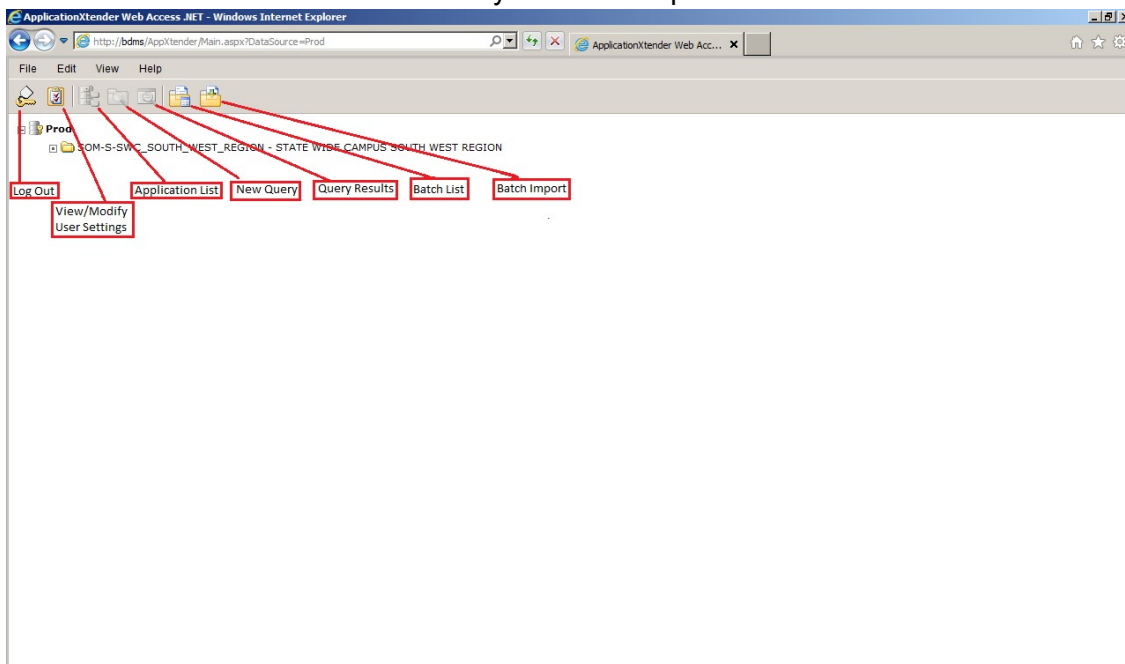
Procedure

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

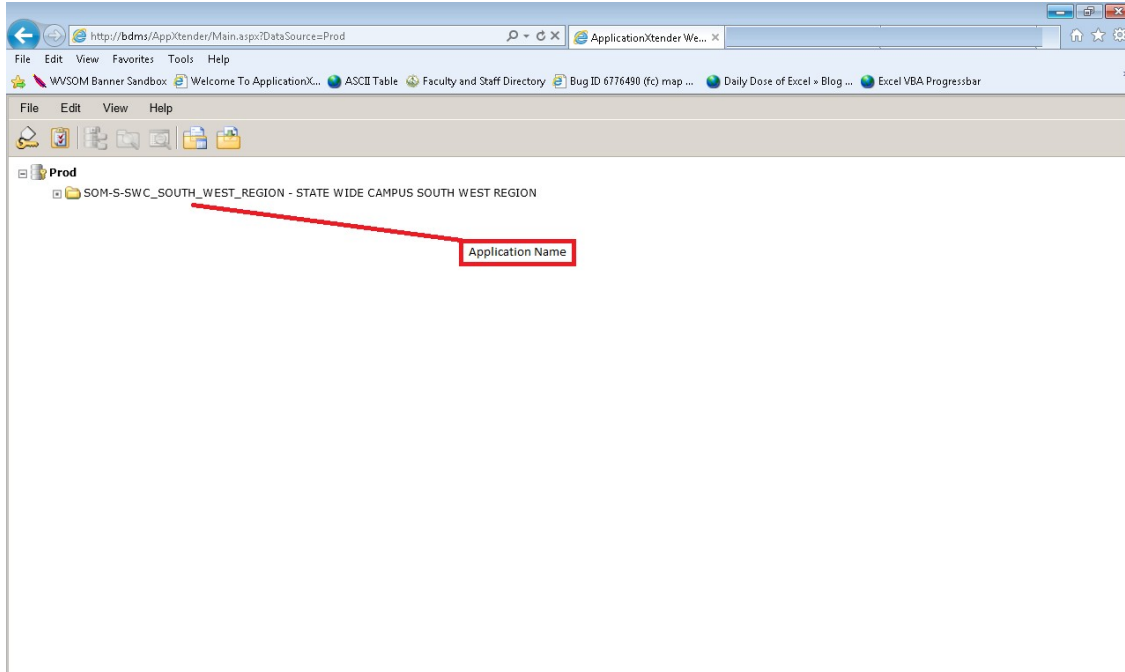
1. Scan your document through R.T.I.V. or your preferred scanning software. You will name this scanned document and save it on your computer.
2. Log into BDMS through the web browser of your choice (Internet Explorer is preferred).



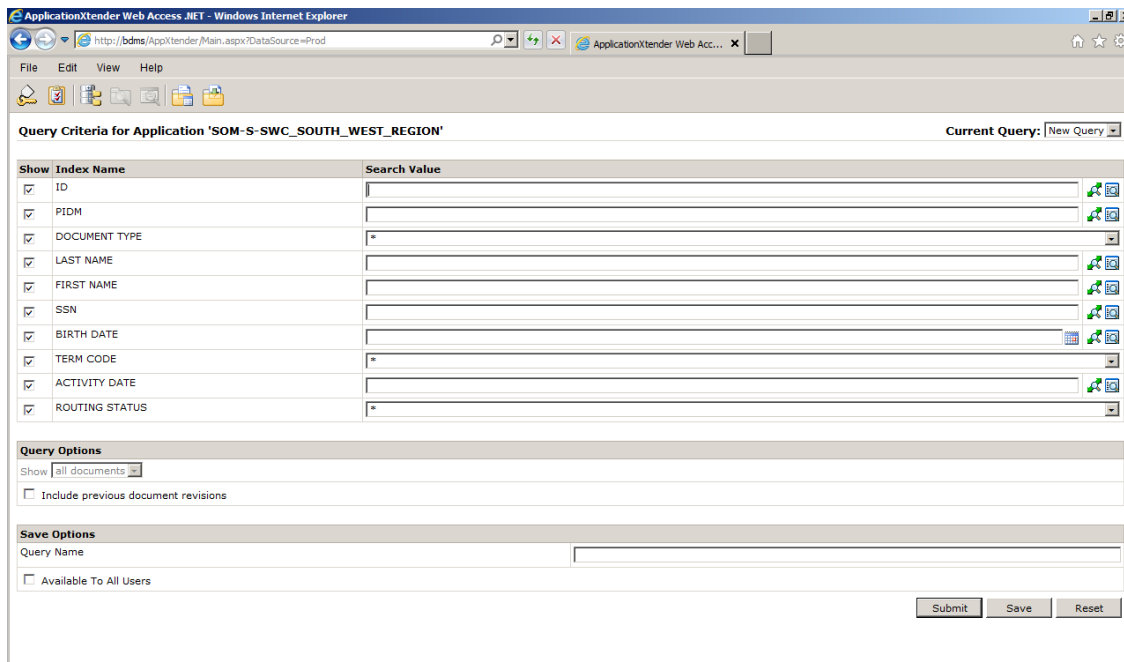
3. You will be brought to the list of subdirectories (applications) after you log in. In this example the application name is SOM-S-SWC_SOUTH_WEST_REGION. The icons across the top of the screen will navigate to different parts of the webXtender features.
- The Log Out button  allows you to exit the BDMS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



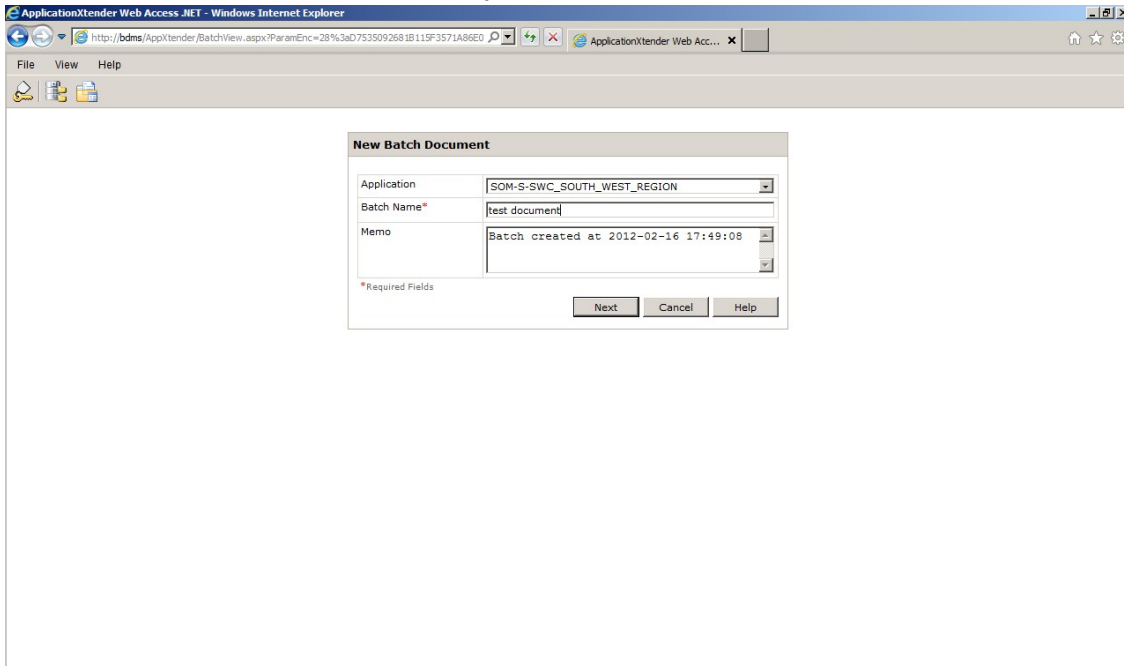
4. Double click on the name of the application to go to the query screen. Your application name will vary depending on which region you are in.



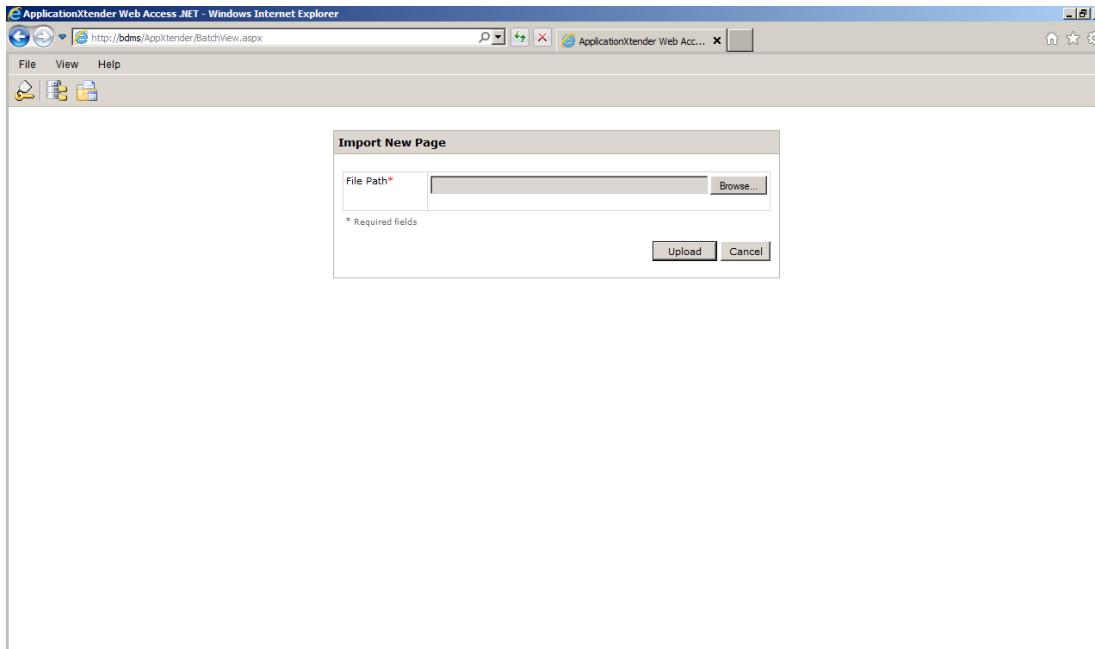
5. The search screen allows you to find indexed documents in BDMS. You may use any combination of indexes (including wild cards) to search for documents. An example of a wild card is the asterisk (*). To search for all documents with the last name that starts with an H you would type H* into the last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




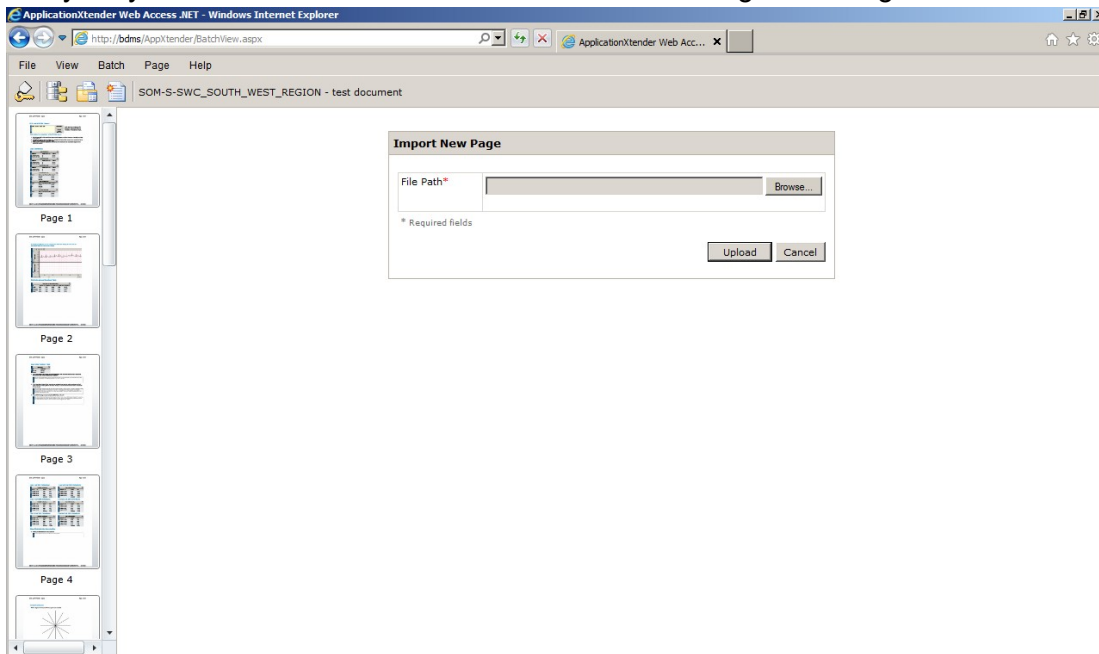
7. Create a Batch Name for the file you want to upload. This will allow you to identify your document in the BDMS Batch List when you want to index it. Click the 'Next' button.




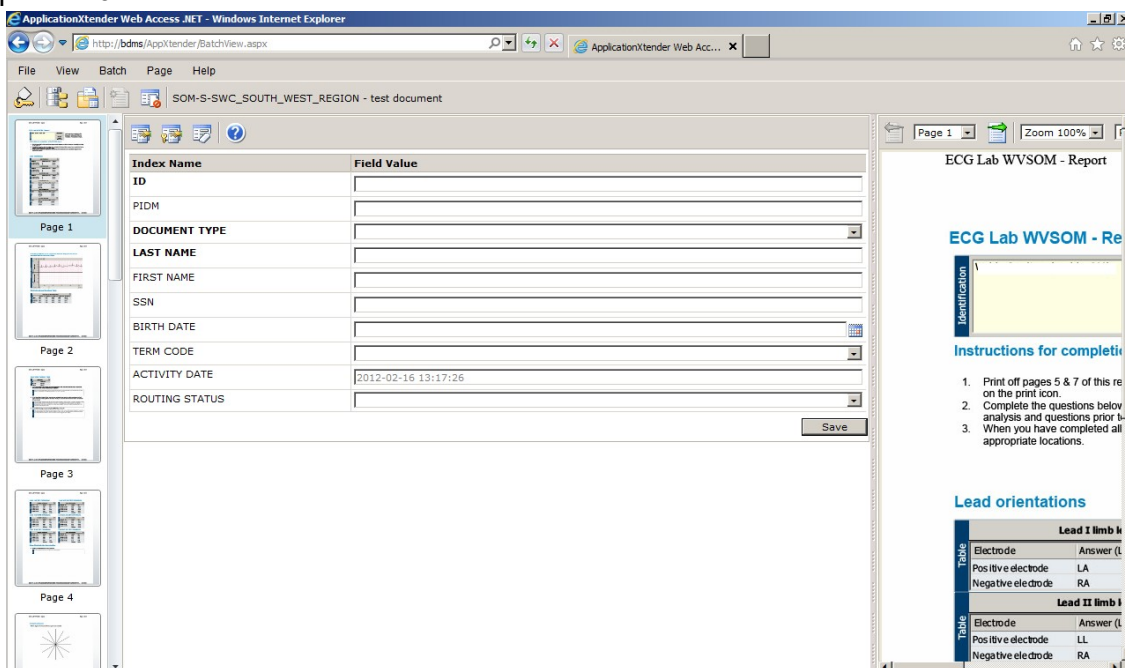
8. Click the Browse button to locate and select the file on your local machine than you want to upload into the BDMS system. Click on the 'Upload' button.




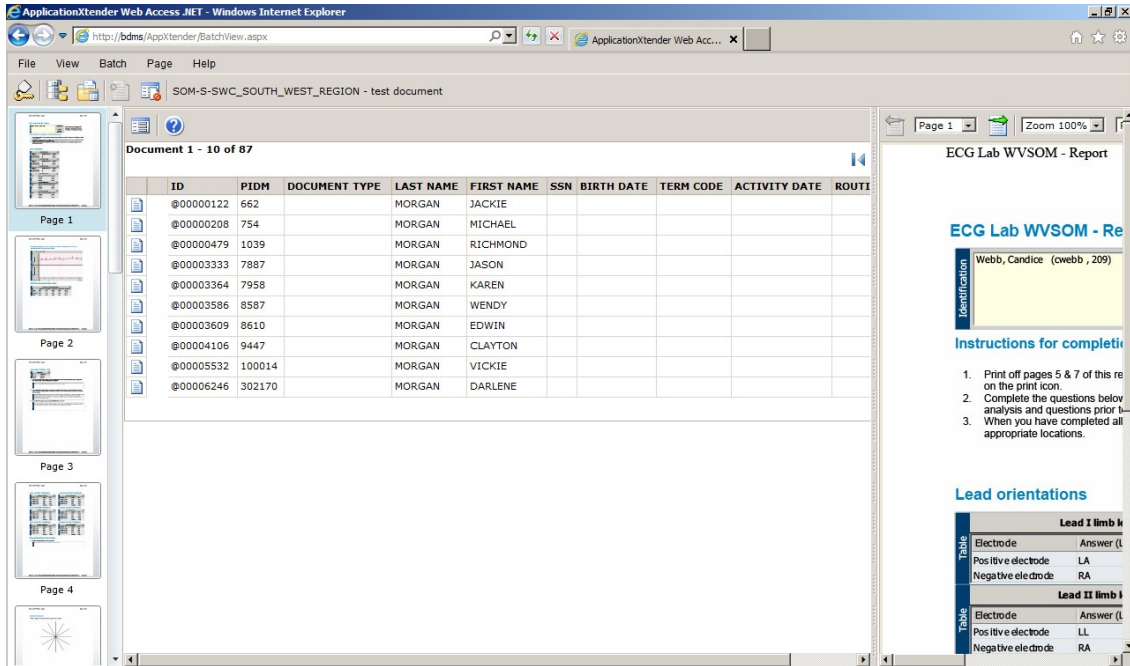
9. The name of your application and Batch name will appear near the top of the screen when the upload is complete. You may or may not see a representation of the pages of your file on the left side of the browser window as shown below. The file is now in the Batch List on the BDMS server and ready for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



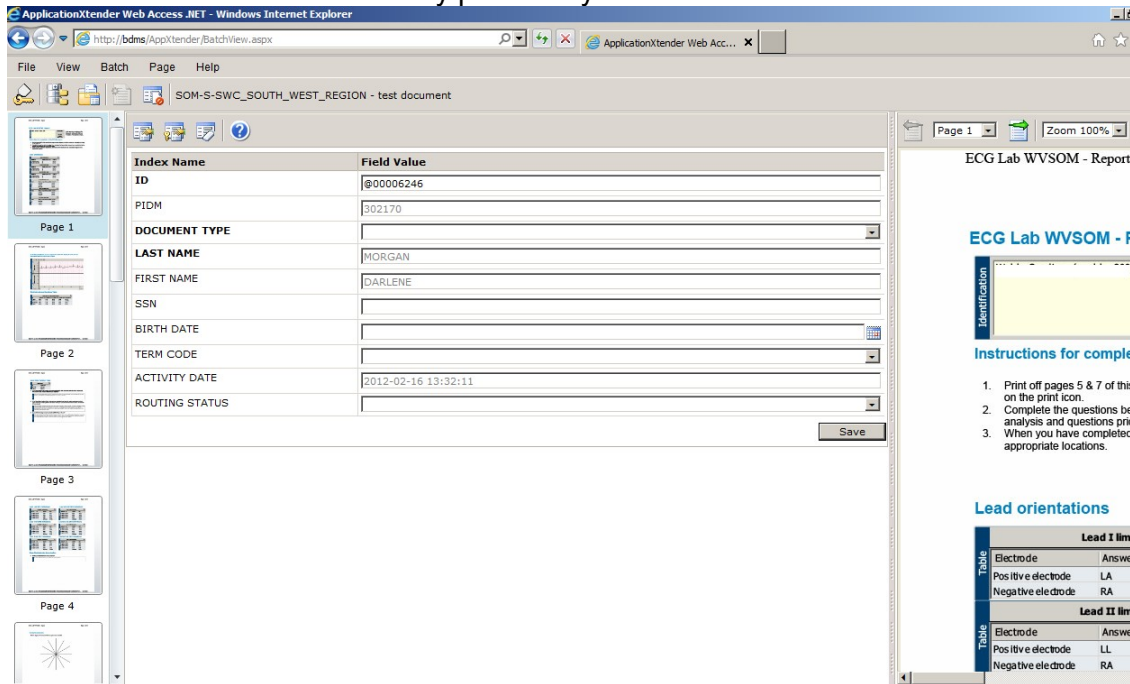
10. You can enter the student ID index and move your cursor to another index to auto populate many of the other fields. Many times, you may not have the student ID but you can locate the student ID and other index information through BDMS if you know either the SSN or last name. Type in the student's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



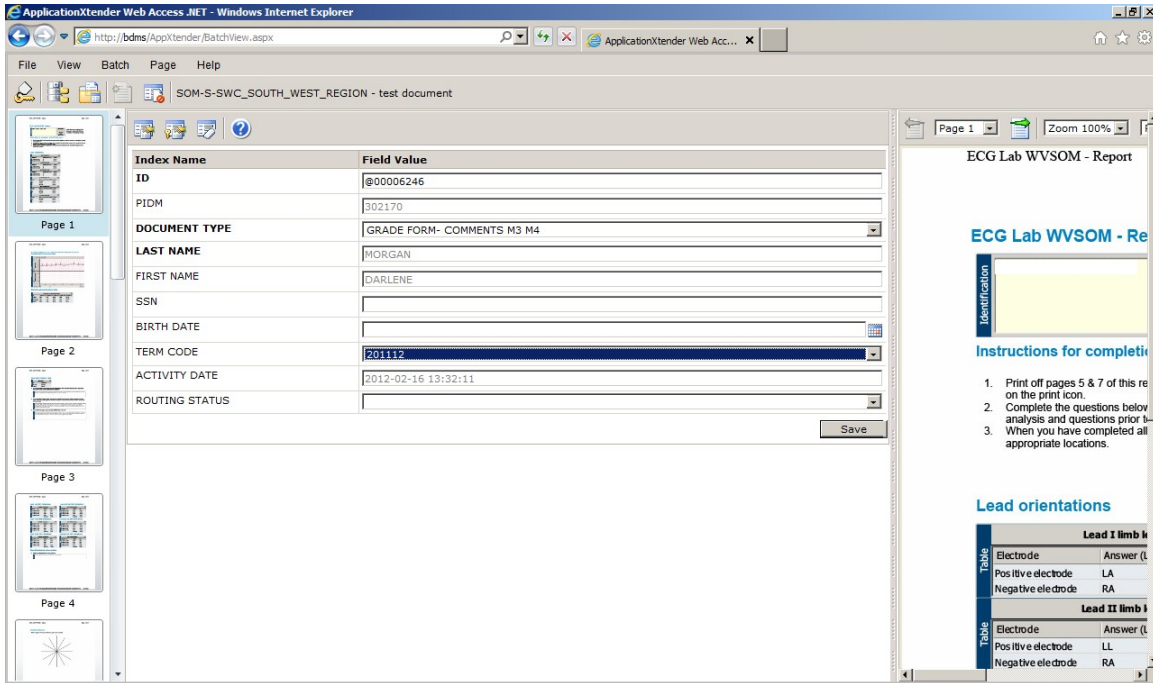
11. Several names may be found in the index search. Click on the 'Select Index' icon  next to the person you wish to use index information for. This will import the index information to be used to index your new document.



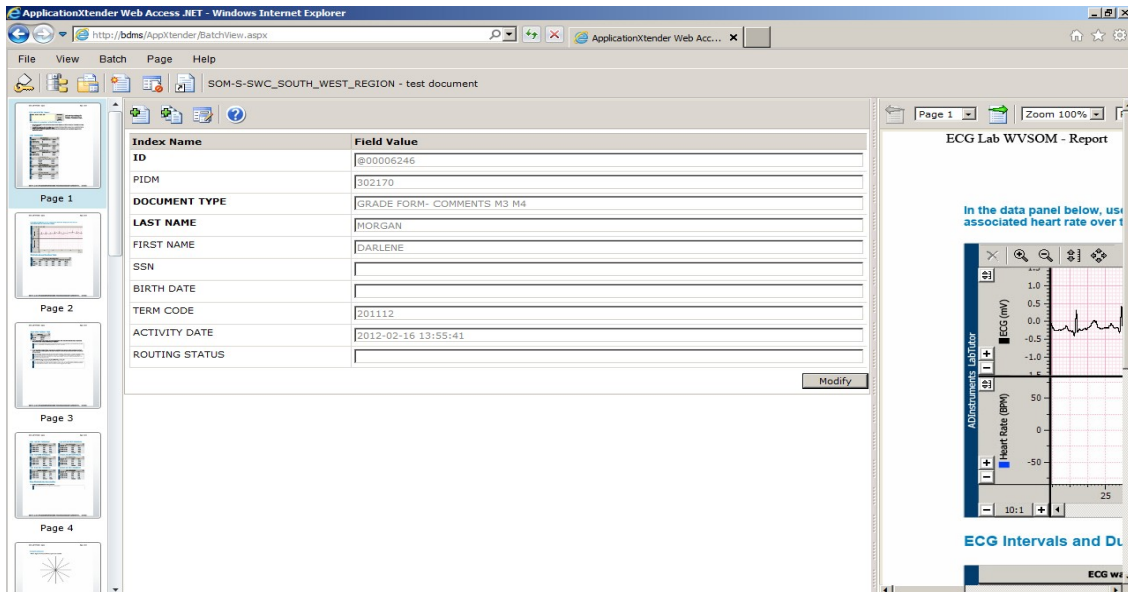
12. The index information is automatically put in for you.



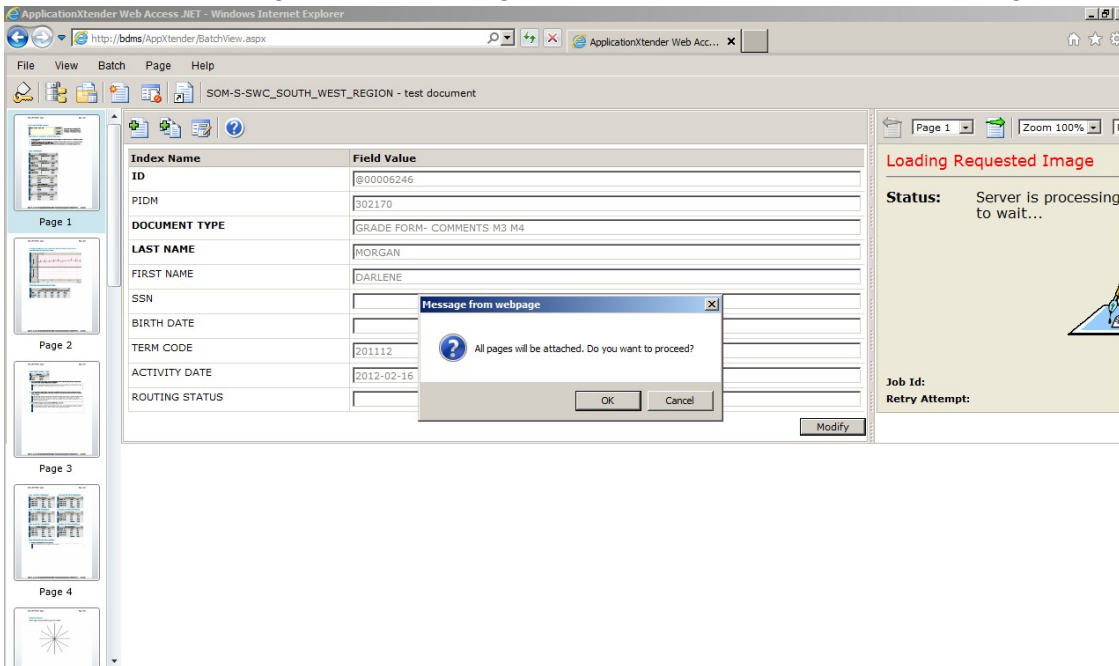
13. Enter the Document Type and Term Code indexes from the drop-down menus then click the Save button. This saves the first page of your document that is selected on the left with the index information. The remaining pages are still in the batch list waiting for you to either index them or add them to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



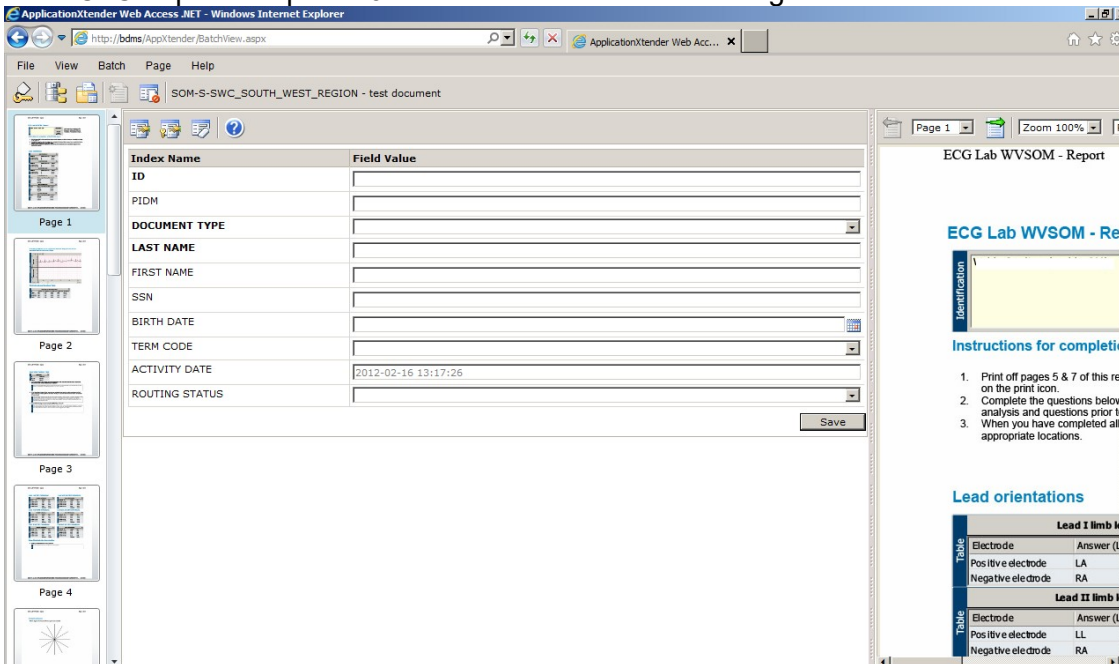
14. You can add the remaining pages to the first indexed page by clicking on the 'Attach All Pages' button. Or you can add any individual page by selecting it from the page list on the left and pressing the 'Attach Current Page' button.




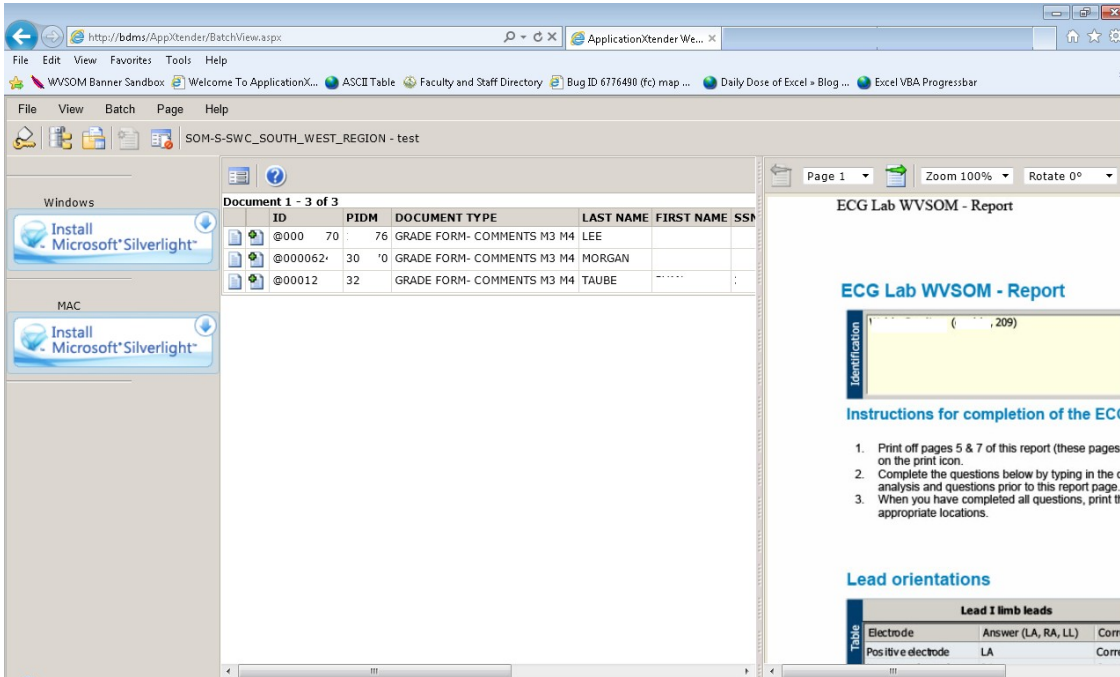
15. After clicking on the 'Attach All Pages' button the system asks you to confirm that you want to attach all pages to the first page. Select the Ok button to attach all pages.



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.



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



The screenshot shows a web browser window displaying a document management application. The browser address bar shows 'http://bdms/AppXtender/BatchView.aspx'. The application interface includes a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar. Below the toolbar, there are several tabs: 'WVSOM Banner Sandbox', 'Welcome To ApplicationX...', 'ASCII Table', 'Faculty and Staff Directory', 'Bug ID 6776490 (fc) map ...', 'Daily Dose of Excel > Blog ...', and 'Excel VBA Progressbar'. The main content area is divided into two panes. The left pane, titled 'Document 1 - 3 of 3', contains a table with the following data:


ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN
@000	70	GRADE FORM- COMMENTS M3 M4	LEE		
@000062	30	'0 GRADE FORM- COMMENTS M3 M4	MORGAN		
@00012	32	GRADE FORM- COMMENTS M3 M4	TAUBE		

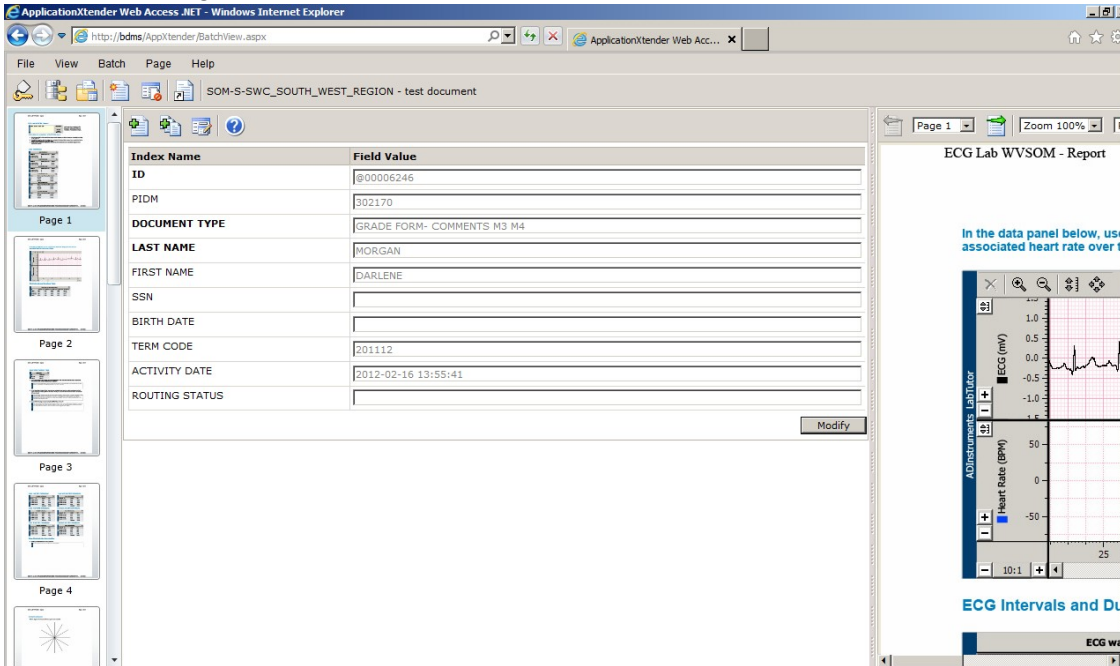
The right pane displays a preview of an 'ECG Lab WVSOM - Report'. The report title is 'ECG Lab WVSOM - Report'. Below the title, there is a section for 'Instructions for completion of the ECG' with the following numbered list:

1. Print off pages 5 & 7 of this report (these pages contain the print icon).
2. Complete the questions below by typing in the designated locations and questions prior to this report page.
3. When you have completed all questions, print the report at the appropriate locations.

Below the instructions, there is a section for 'Lead orientations' with a table titled 'Lead I limb leads':

Electrode	Answer (LA, RA, LL)	Correct
Positive electrode	LA	Correct


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

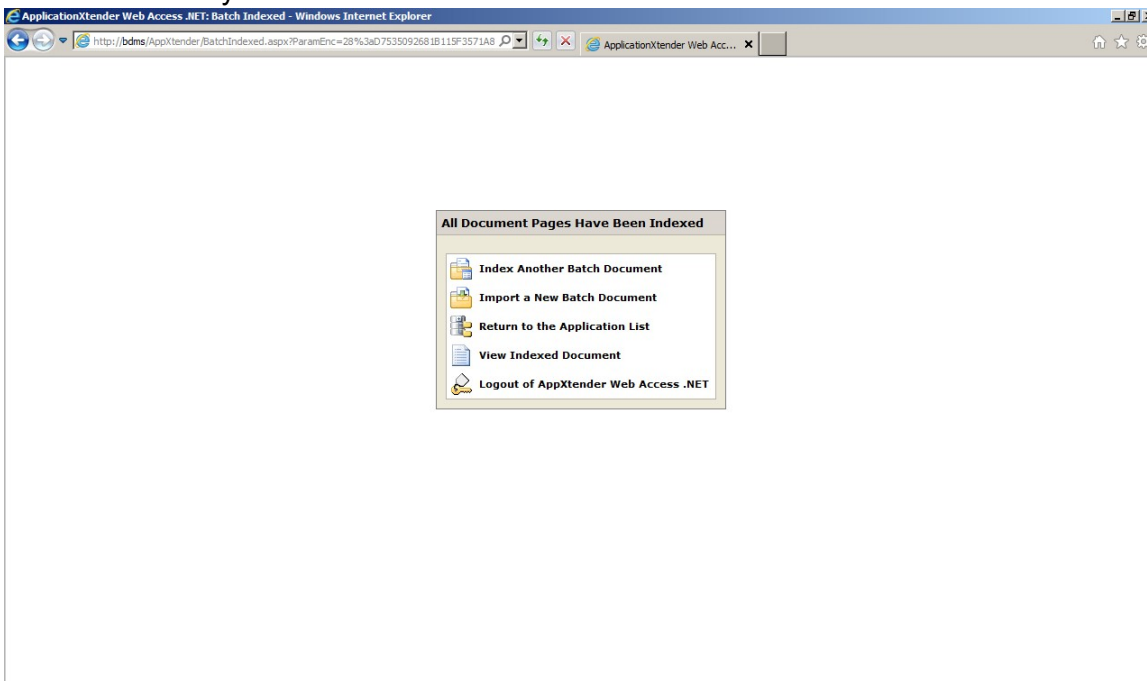


The screenshot shows the ApplicationXtender Web Access interface. On the left, a sidebar displays a document structure with four pages. The main area shows a document titled 'SOM-S-SWC_SOUTH_WEST_REGION - test document' with a table of fields and values:

Index Name	Field Value
ID	@00006246
PIDM	302170
DOCUMENT TYPE	GRADE FORM- COMMENTS M3 M4
LAST NAME	MORGAN
FIRST NAME	DARLENE
SSN	
BIRTH DATE	
TERM CODE	201112
ACTIVITY DATE	2012-02-16 13:55:41
ROUTING STATUS	

Below the table is a 'Modify' button. On the right, a preview of 'ECG Lab WVSOM - Report' is shown, featuring an ECG waveform and a heart rate graph. The graph shows a heart rate of approximately 100 bpm. Text on the page includes 'In the data panel below, use associated heart rate over t' and 'ECG Intervals and Du'.

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



The screenshot shows the ApplicationXtender Web Access interface after a document has been indexed. The main area displays a message box titled 'All Document Pages Have Been Indexed' with the following options:

- Index Another Batch Document
- Import a New Batch Document
- Return to the Application List
- View Indexed Document
- Logout of AppXtender Web Access .NET