

# BDMS Invoice Documentation Process Training

---

*How to process invoice documentation into the Banner Document Management System (BDMS)*

## Table of Contents

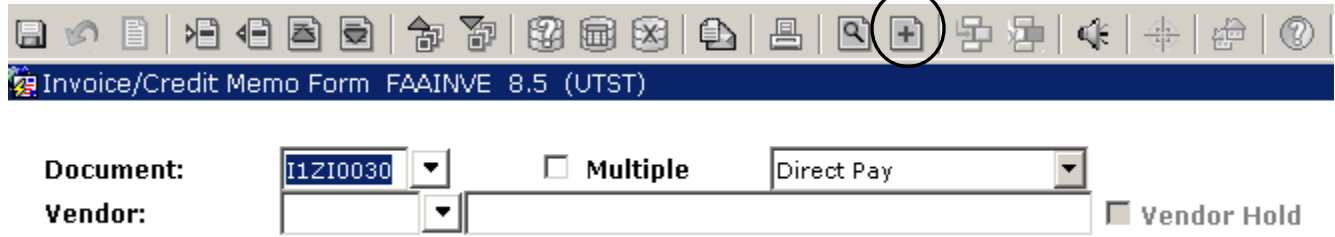
|                                                                                     |           |
|-------------------------------------------------------------------------------------|-----------|
| <b>Initial BDMS Setup on Your PC</b>                                                | <b>2</b>  |
| 1. Synchronize your BDMS and Banner password.....                                   | 2         |
| 2. Verify the installed components of the BDMS software .....                       | 3         |
| 3. Verify your user settings .....                                                  | 4         |
| Additional information available .....                                              | 6         |
| <b>Overview - The Steps of the Business Process</b>                                 | <b>8</b>  |
| 1. Imaging Documents .....                                                          | 9         |
| A. Using an MFD or shared scanner to create a file for import: .....                | 9         |
| B. Using existing source documents like an .xlsx, .docx, email, or a PDF file. .... | 10        |
| 2. Import file(s) into BDMS and associating with the appropriate transaction .....  | 10        |
| A. When there is documentation for only a single document in a file .....           | 10        |
| B. When there is documentation for multiple documents in a file (batch).....        | 12        |
| 3. Performing Quality Control Review .....                                          | 14        |
| 4. Indexing.....                                                                    | 15        |
| 6. Reorient pages as required.....                                                  | 17        |
| 7. Remove source document(s) from shared folder(s).....                             | 20        |
| 8. Keeping the paper documents.....                                                 | 21        |
| <b>Modifications to existing documentation</b>                                      | <b>22</b> |
| 1. Change an index field.....                                                       | 22        |
| 2. Adding new documentation to an existing index.....                               | 23        |
| <b>Appendix</b>                                                                     | <b>26</b> |
| Preparing an Email message for import .....                                         | 26        |
| What do I do about this Unique Key Violation error? .....                           | 27        |
| Search (query) for a document.....                                                  | 28        |
| BDMS Finance Application List .....                                                 | 29        |
| BANNER Document and Form List.....                                                  | 29        |

## Initial BDMS Setup on Your PC

New to document imaging and the BDMS software? Here are the steps to get you started:

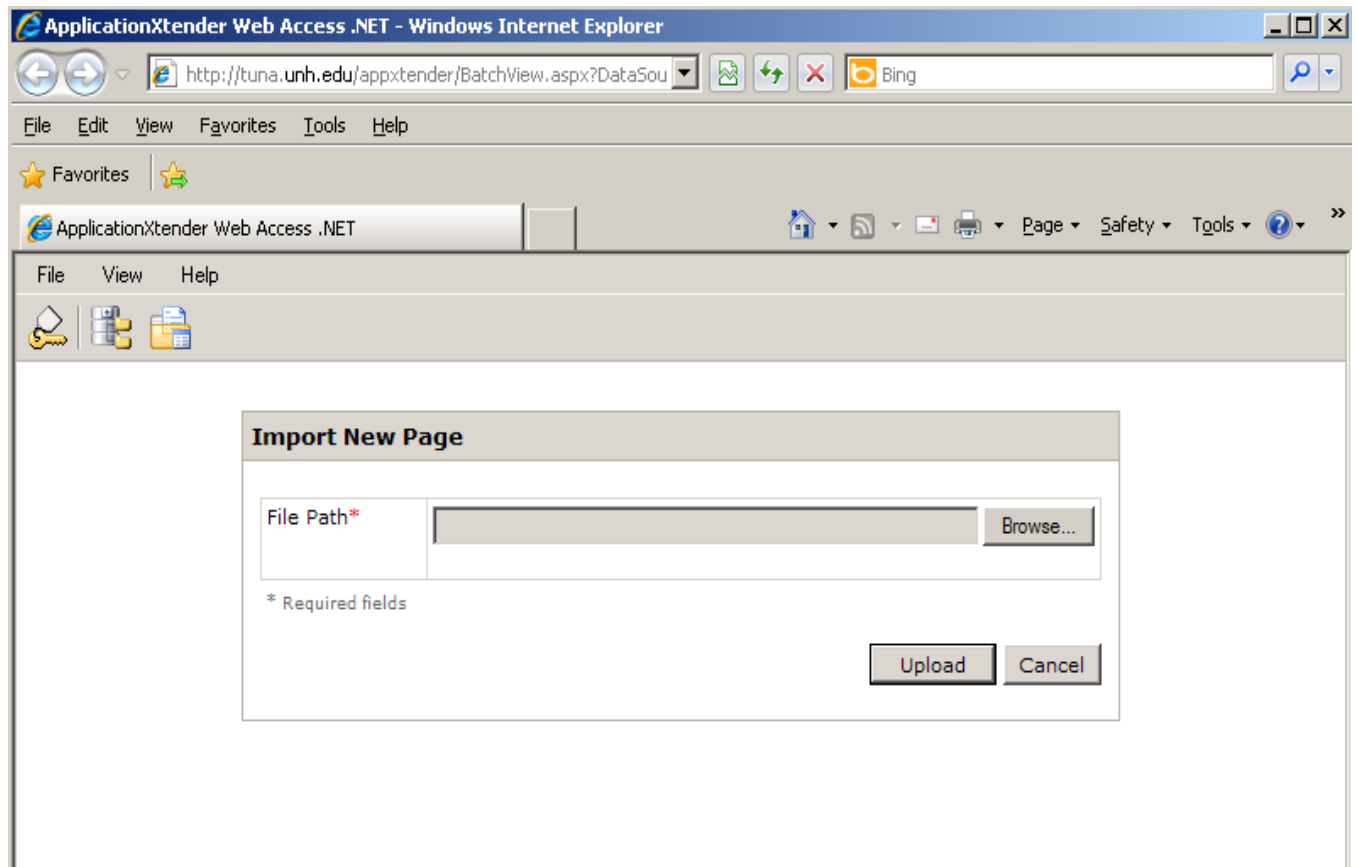
1. **Synchronize your BDMS and Banner password** by going into a Banner form, such as FAAINVE, and open up the BDMS- display document button.

You should enter a document number (any document number) into the “Document Number” field. If you do not, it causes a query to be executed for all items and this could take some time.



The screenshot shows the FAAINVE 8.5 (UTST) form. The toolbar at the top contains various icons, with the 'BDMS- display document' button (a document icon with a plus sign) circled in red. Below the toolbar, the form fields are visible: 'Document:' with a dropdown menu showing '11210030', a checkbox for 'Multiple', and a dropdown for 'Direct Pay'. The 'Vendor:' field is empty, and there is a 'Vendor Hold' checkbox.

This will open up a browser window and connect to the BDMS server. You should see an import new page screen like the one shown below. The system has now synchronized your password.



The screenshot shows a Windows Internet Explorer browser window titled 'ApplicationXtender Web Access .NET'. The address bar shows the URL 'http://tuna.unh.edu/appxtender/BatchView.aspx?DataSou'. The browser window displays the 'Import New Page' dialog box. The dialog box has a 'File Path\*' field with a 'Browse...' button next to it. Below the field, there is a note '\* Required fields'. At the bottom of the dialog box, there are 'Upload' and 'Cancel' buttons.

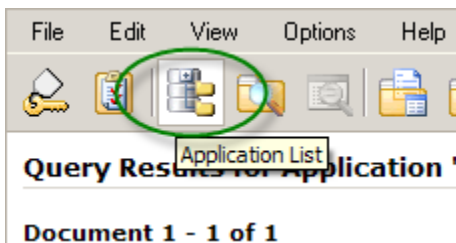
Do this for each Banner instance, i.e. BPRD, BTST, UTST, etc.

If this is the first time you have accessed BDMS on your computer – proceed to step 2, otherwise you are ready to move on to querying/processing. Stay in BDMS for the next step.

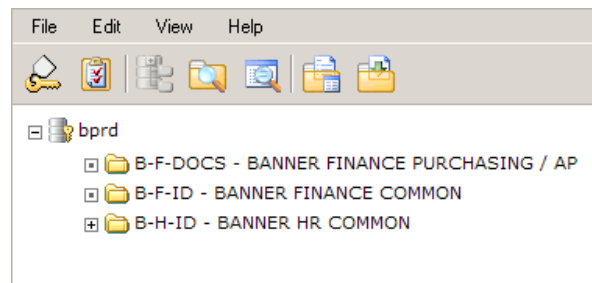
## 2. **Verify the installed components of the BDMS software** on your computer.

This only needs to be done once per computer you use. If you have already done these steps on this computer – you do not need to repeat them.

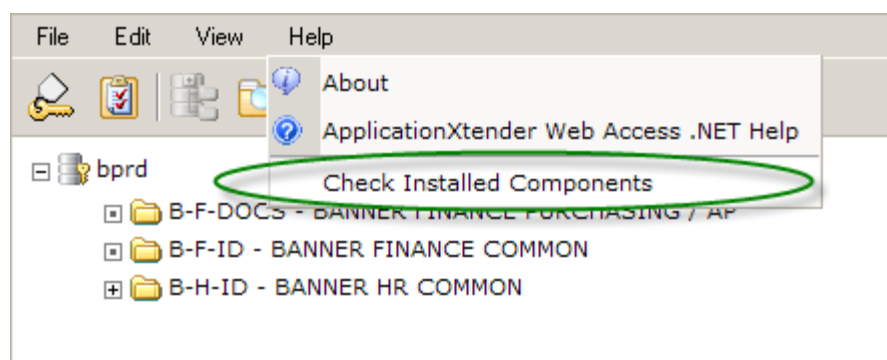
While on the Query Results or Query Criteria page, select the “Application List” icon from the menu



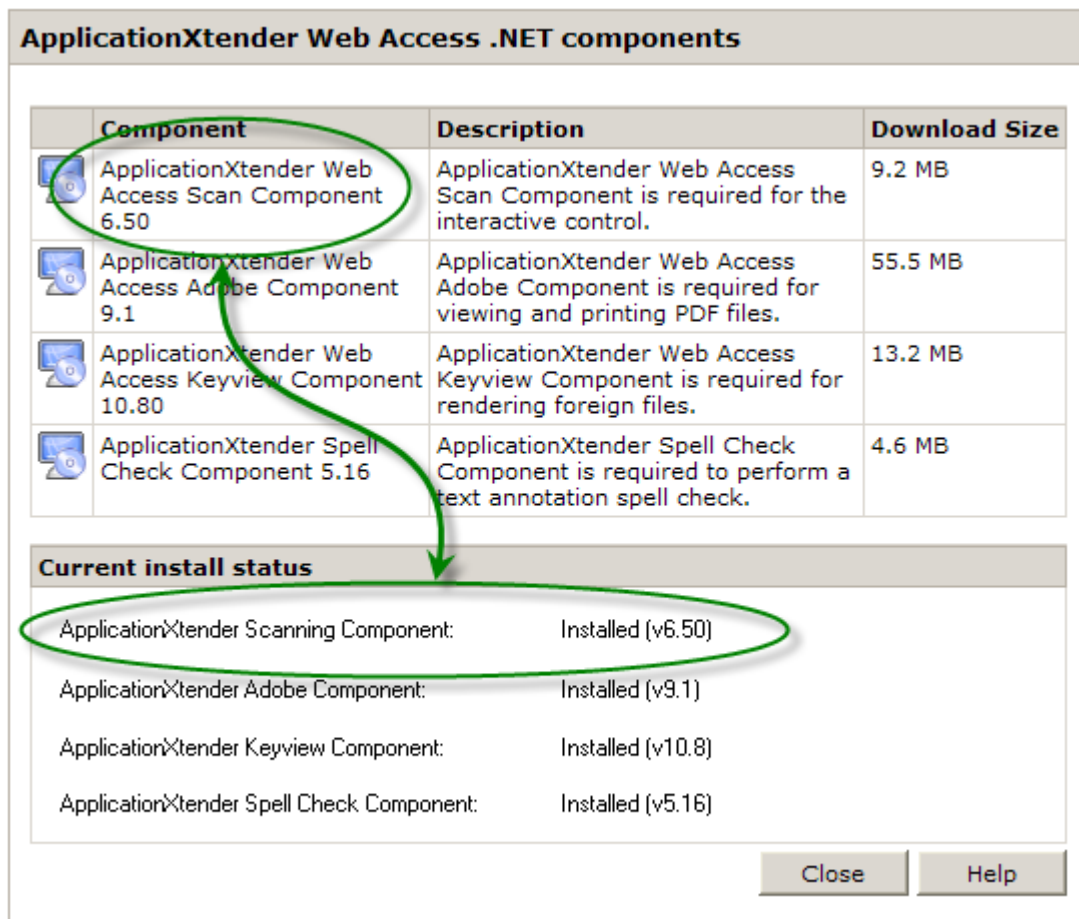
This will bring up all the applications you have access to in BDMS. (See the appendix for a definition and listing of BDMS applications)



Go the Help menu on the Application page in BDMS and click on “Check Installed Components” under “Help”



This will open a window that will display the available components as well as a listing of what the status is for each of these components. Should you get an error message on this screen – there could be a message at the very top of the page indicating a request to install some active-x control. Right click on this message and select install control – then click yes on any subsequent messages you may see. When complete – the list should automatically complete.



Confirm the current install status shows “Installed” and lists the same version as is described in the application listing above. In the example depicted, the “Scanning Component” is listed as “v6.5” in both the component list and the current installed status.

If you do not have all the component’s listed or there are different versions installed than are listed in the component list, you need to install the component. Click on the blue icon next to the component you wish to install from the list at the top of the menu. This will download and install the selected component. As with most windows installs, you may have to click the “yes” button several times for this to complete.

All four items need to say “Installed” and reference the correct version number when complete.

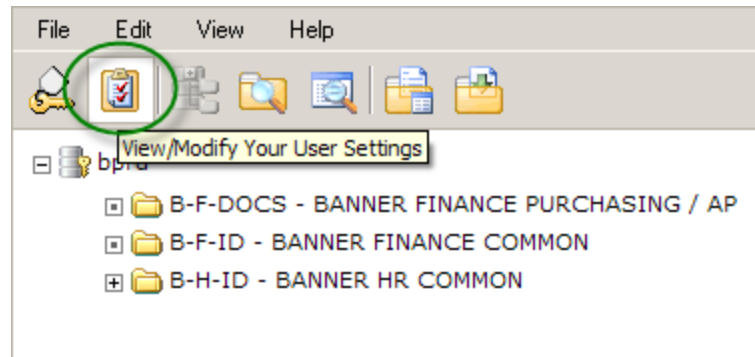
Once this is achieved, click on the “Close” button at the bottom of the window. This will return you to the “Applications List”.

3. **Verify your user settings.** The User Settings button allows you to control the way documents are retrieved, displayed, exported, and printed in BDMS. The changes you make to your settings will not affect other users.

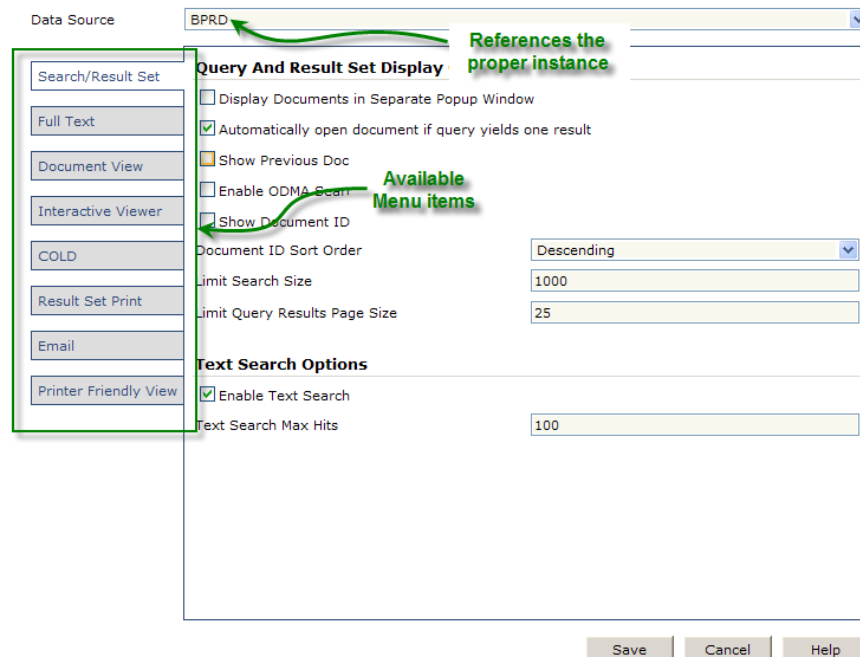
The items listed below are recommended settings for all users and should be completed before you use BDMS to provide a consistent view of documents. If this is not completed, the view you have of the BDMS screens and or documents may not look like what is in this document.

You may change other settings based on your individual needs, as you use the product.

From the “Application List” screen click on the User Settings icon, this can also be selected from the “Edit” menu item.

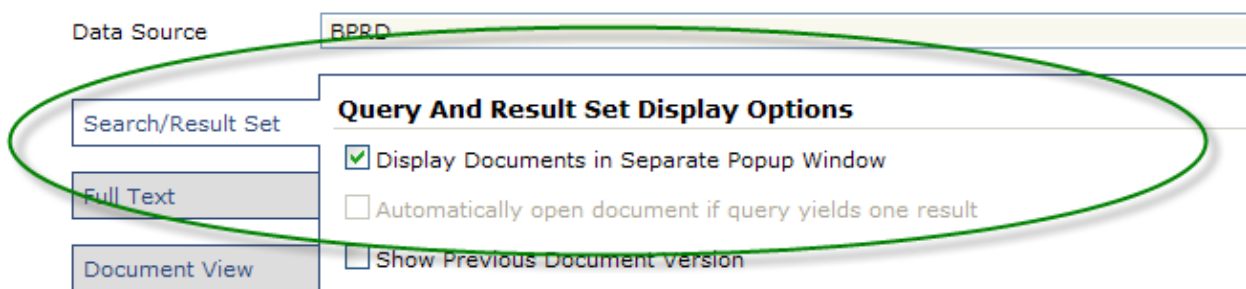


There are several menus available with multiple selections per tab. There are recommended changes to only two of the tabs, the first tab, “Search/Result Set”, and the fourth tab, “Interactive Viewer”.



On the “Search/Results Set” tab:

- select the “Display Documents in Separate Popup Window” checkbox



*Note that this will gray out the second option on this tab.*

On the “Interactive Viewer” tab:

- select the “Enable Interactive Viewer” checkbox.
- select the “Use Keyview To Display Foreign Files” checkbox

|                   |                                                                                                                                                                                                                                     |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Data Source       | BPRD                                                                                                                                                                                                                                |
| Search/Result Set | <b>Interactive Viewer Options</b><br><input checked="" type="checkbox"/> Enable Interactive Viewer<br><input checked="" type="checkbox"/> Use KeyView To Display Foreign Files<br><input checked="" type="checkbox"/> Scale-To-Gray |
| Full Text         |                                                                                                                                                                                                                                     |
| Document View     |                                                                                                                                                                                                                                     |

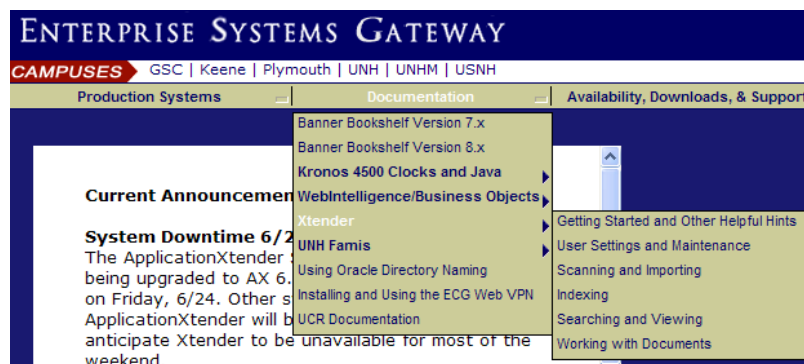
Other items on each tab may be selected as you choose.

When finished, click the “Save” button in the lower right hand corner of the window to keep the setting you have just made.

## Additional information available

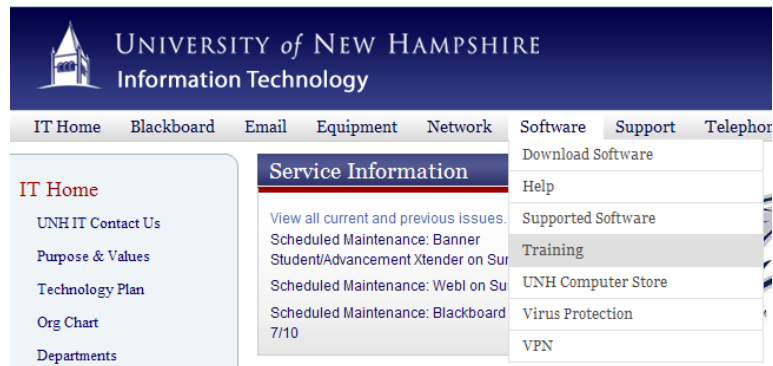
General SunGard documentation on the USNH Gateway webpage

<http://www.usnhgateway.org/> >> Documentation >> Xtender



Detailed UNH BDMS training is available Xtender training class through UNH IT –

<http://it.unh.edu/> >> Software >> Training



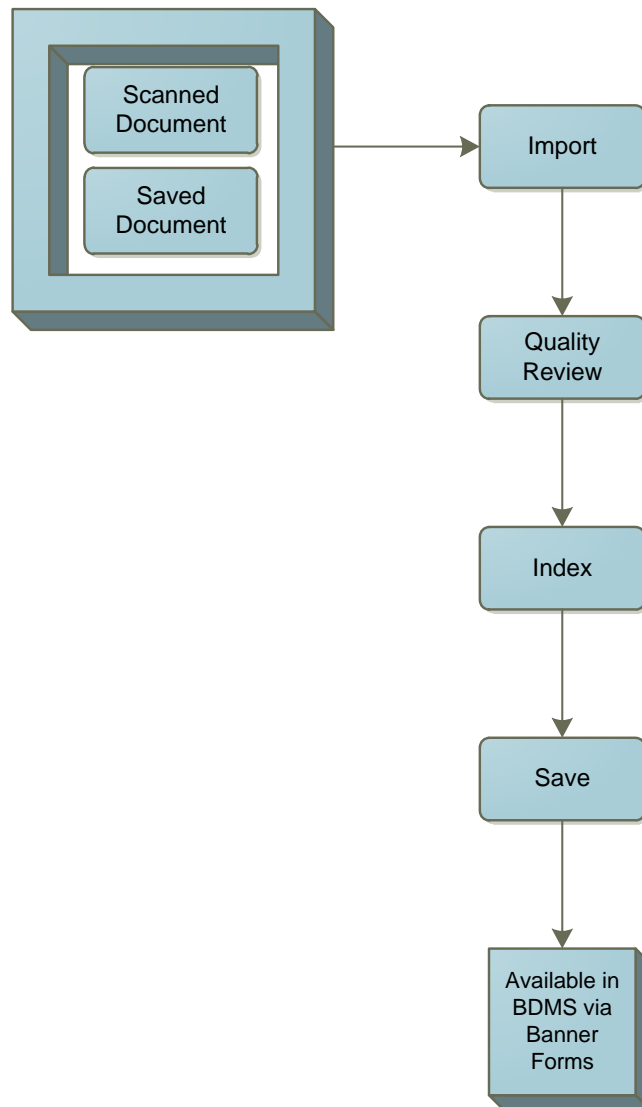
### To Sign Up



## Overview - The Steps of the Business Process

The process of scanning, saving, indexing, and finalizing journal voucher documentation is made up of 8 basic steps. We will go into detail for each of the steps in the process further along in the document.

1. [Scan a paper document or locating an existing file.](#)
2. [Import into BDMS.](#)
3. [Perform quality control review.](#)
4. [Index the document\(s\).](#)
5. [Save indexed document.](#)
6. [Re-orient pages as required](#)
7. [Remove source document\(s\) from shared folder\(s\).](#)
8. [Keeping the paper documents.](#)





## 1. Imaging Documents

There are several methods of associating documentation with Banner documents.

- A. Using a Multi-Function Device (MFD) or shared scanner to create a file for import:
  - a. as an individual document
  - b. as a batch
- B. Using existing source documents like an .xlsx, .docx, email, or a PDF file.
- C. Scanning directly into BDMS

We will discuss options A and B here. Option C requires a personal scanner connected to your desktop. This will not be covered here. Additional information on this and other functions is available in the general documentation at the gateway page and/or sign up for IT training. (see [additional information](#) for links)

### A. Using an MFD or shared scanner to create a file for import:

This requires your MFD to be properly configured.

If you are uncertain how to do this, please contact the vendor for assistance.

Some of the options that need to be set up:

- i. Create a shared network folder
- ii. Enable Send to Folder option
- iii. Set default settings for copy color type, DPI, and file type
- iv. Various security settings that authorizes users

Using other MFDs or a shared scanner will be similar.

The materials scanned may be for a single document or for a group of documents (batch). If you prefer, you can scan the materials for each individual document into a separate file-folder on the server. Alternatively you may scan the materials for a number of transactions into a single large item which you will continuously import until all the materials have been associated with transactions. What follows below are the generic MFD steps.

1. Place your documents face up in auto document feeder or face down on the glass plate if an auto feeder is not available. This is just like you are making regular copies. Make sure you account for changes in paper size and double sided copies.
2. Touch the Folder button (on the right side of screen).
3. Select a folder from the list.  
(Louise.usnh.edu\Imaging\deptname\Invoiceimages)
4. Touch the FileName: button and type a file name for your document.
5. Touch the OK button to return to the Folder screen.
6. Press the Start button to send. Document is “scanned” and saved as a PDF with the desired file name.
7. This results in a single PDF file that provides the documentation for 1 or more journal voucher(s).



## B. Using existing source documents like an .xlsx, .docx, email, or a PDF file.

Many types of documents that you work with on a daily basis may be used as supporting documentation in their normal state. That is you can use an excel file saved as a functioning .xls, .xlsx etc. directly to BDMS in support of a transaction.

All Microsoft Office files from version 10 back through 2003 are compatible with BDMS. Text files such as those created with notepad or WordPad or saved email need to be saved as text files to be imported. (see email section in the appendix).

Adobe files (.pdf which is what is generally created by the MF devices) can be used and read directly in BDMS.

To make the process more consistent, you may want to move/copy any files you have which will be used for support into the same directory as you are currently storing the scanned files you created in step A above (<\\\\Louise.usnh.edu\\usnh\\Imaging\\deptname\\Invoiceimages>).

## 2. Import file(s) into BDMS and associating with the appropriate transaction

These files may be existing PDFs, xlsx, docx, etc files or images of those documents just scanned. It is recommended that the directory (<\\\\Louise.usnh.edu\\usnh\\Imaging\\deptname\\Invoiceimages>) be used for all your data files for consistency.

The documentation can only be associated with an already existing transaction in Banner. If the transaction does not yet exist, and therefore has no document number in Banner yet, the documentation cannot be fully associated with the transaction.

**Important:** If you are adding multiple documents, you will need to make sure you follow the instructions for multiple documents. If you use the single document instructions, it will cause batches to get stuck in BDMS.

### A. When there is documentation for only a single document in a file

You may begin the process from many different forms. The document number you are focusing on must be on the page you are starting from. Some examples are below:

| Journal Vouchers<br>(JV) | Invoices (INV) | General Forms |
|--------------------------|----------------|---------------|
| FGAJVCD                  | FAAINVE        | FOAUAPP       |
| FGAJVCQ                  | FAIINVE        | FOIDOC        |
| FGAJVCM                  | FAAINVT        | FGATRND       |
|                          |                |               |

See Appendix for more details.

Regardless of the form you start from – each of the steps are the same. For this document, we will begin from FAAINVE.

Document: 11210030 ☐ Multiple Direct Pay

Vendor:  ☐ Vendor Hold

The document number is highlighted . This indicates the document you are interested in. There are two buttons on the top menu (circled above) which relate to BDMS.

Here is what the form looks like if you start importing from FAIINVE.

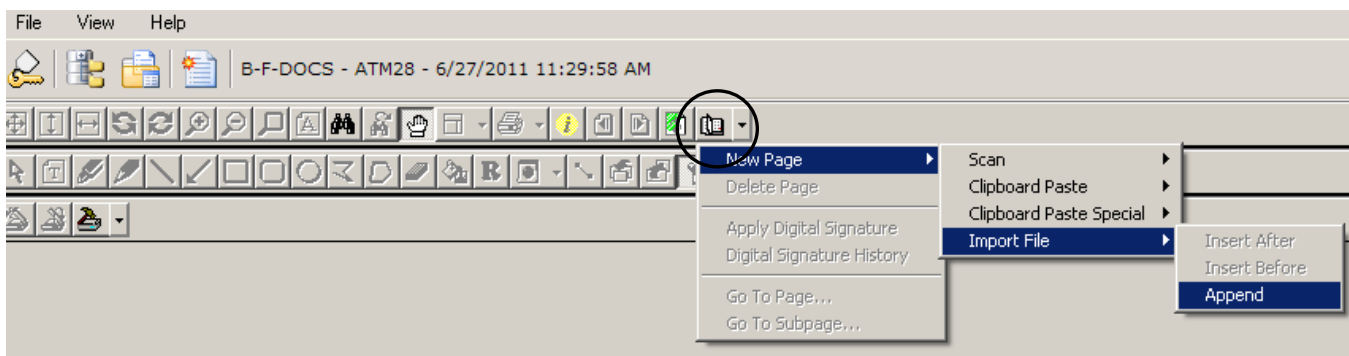
Document : 11210030 ☐ Multiple

Regardless of which form you start from you will be choosing the big plus icon, BDMS – Add Document to begin the import process.

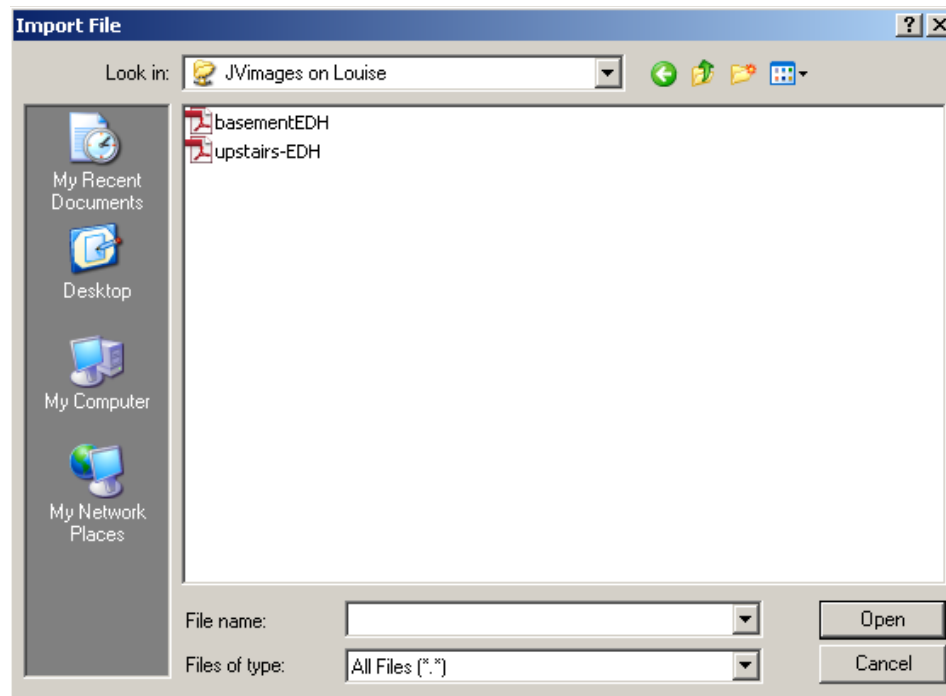


Begin the process by clicking on the BDMS – Add Document button as shown above. BDMS will open in the import screen shown below.

1. Click the **New Page** button.



2. Follow the menu path: New Page >> Import File >> Append.
3. In the Import File box, select the file you wish to import and click the Open button.

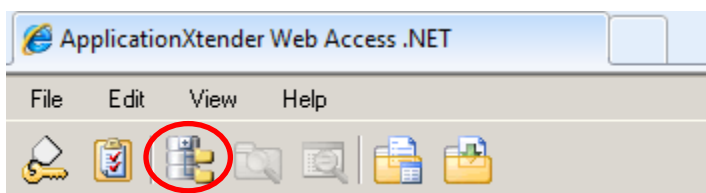


The document is now imported but needs to be compared to the source documents to ensure all pages are accounted for, it is in the correct order, and fully legible.

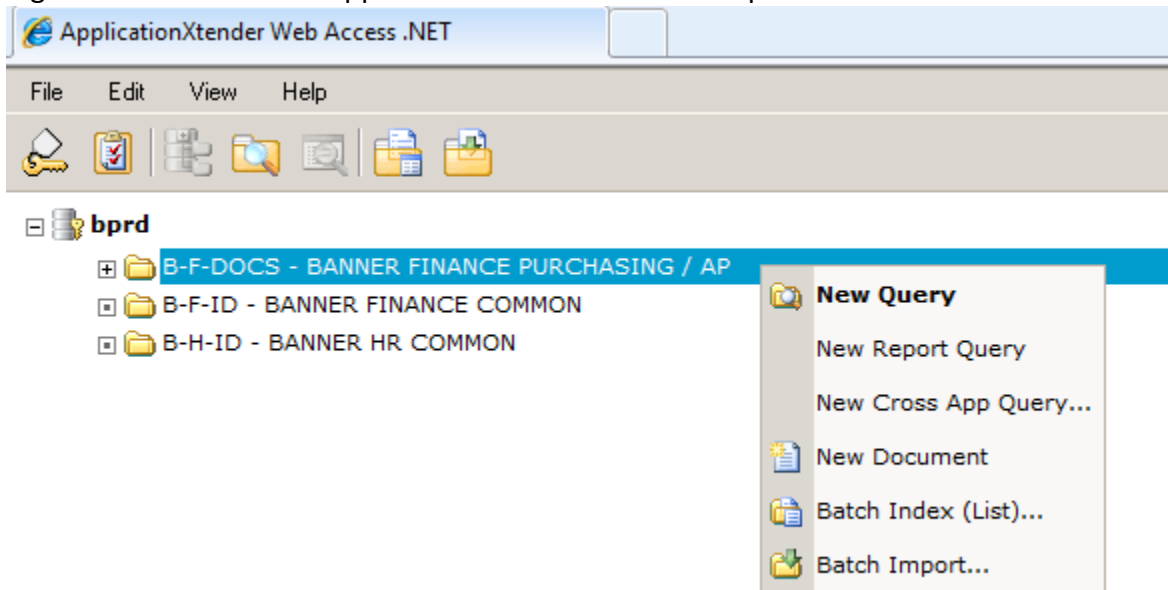
## B. When there is documentation for multiple documents in a file (batch)

Begin the process by logging into BDMS directly from [www.usnhgateway.org](http://www.usnhgateway.org) (Production Systems >> Application Xtender Web Access >> USNH Finance/HR BPRD). Do NOT re-use BDMS windows that were launched from Banner using the BDMS – Add Document or the BDMS – Display Document buttons.

1. When you initially login to BDMS you will be at the Application List. If you are not already there, click the Application List button on the toolbar.



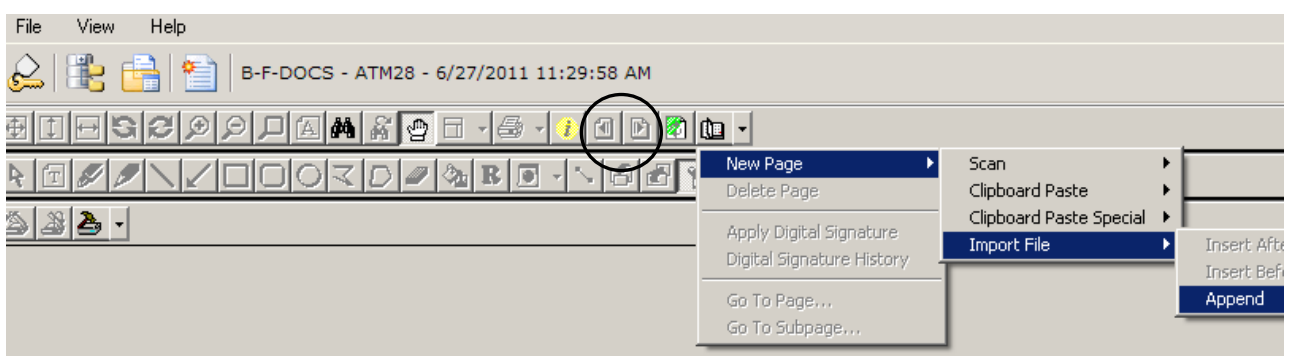
2. Right-click the B-F-DOCS application and select "Batch Import..." from the menu.



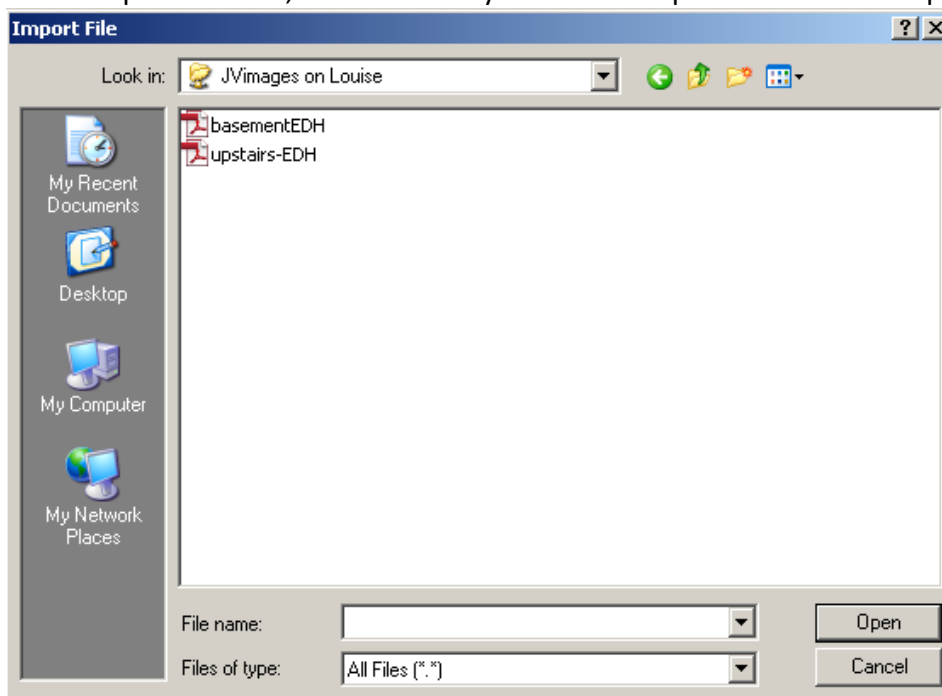
3. The New Batch Document screen appears.
4. In the Batch Name field, enter a temporary batch name and click the Next button.  
We recommend that the temporary batch name include your username plus a unique identifier – for example username1 or username2.

The 'New Batch Document' form is displayed. It has a title bar 'New Batch Document'. The form contains three main input fields: 'Application' (a dropdown menu showing 'B-F-DOCS'), 'Batch Name\*' (an empty text field), and 'Memo' (a text area containing 'Batch created at 2012-04-12 13:50:51'). Below these fields, there is a checkbox labeled 'Thin client upload' which is currently unchecked. At the bottom of the form, there are three buttons: 'Next', 'Cancel', and 'Help'. A legend indicates that '\*' denotes 'Required Fields'.

5. Click the New Page button.



6. Follow the menu path: New Page >> Import File >> Append.
7. In the Import File box, select the file you wish to import and click the Open button.



NOTE: you can select more than one file by holding down the CTRL key and clicking on multiple files. The files do not need to be the same type.

8. Steps 5-7 can be repeated to add multiple source documents to the batch.
9. The documents are now imported and are ready to be checked for quality and indexed.

### 3. Performing Quality Control Review

All documentation must be reviewed for quality control purposes. Quality control has 6 elements that must separately be verified. This function is **vital** since there will ultimately be no paper.

1. All scanned documents must be at least 300 DPI and in black and white.
2. All pages in the documentation package must be present. Make certain both sides of your document were scanned.
3. All pages need to be oriented correctly. The top of the image must be the top of the page regardless of the page's orientation, i.e. portrait or landscape. If any page does not meet this requirement please note which pages need to be addressed. You can correctly reorient the page once the document has been indexed. See [section 6](#) for the specific instructions to reorient a page once it has been indexed.
4. Pages must be related to the document that is being supported

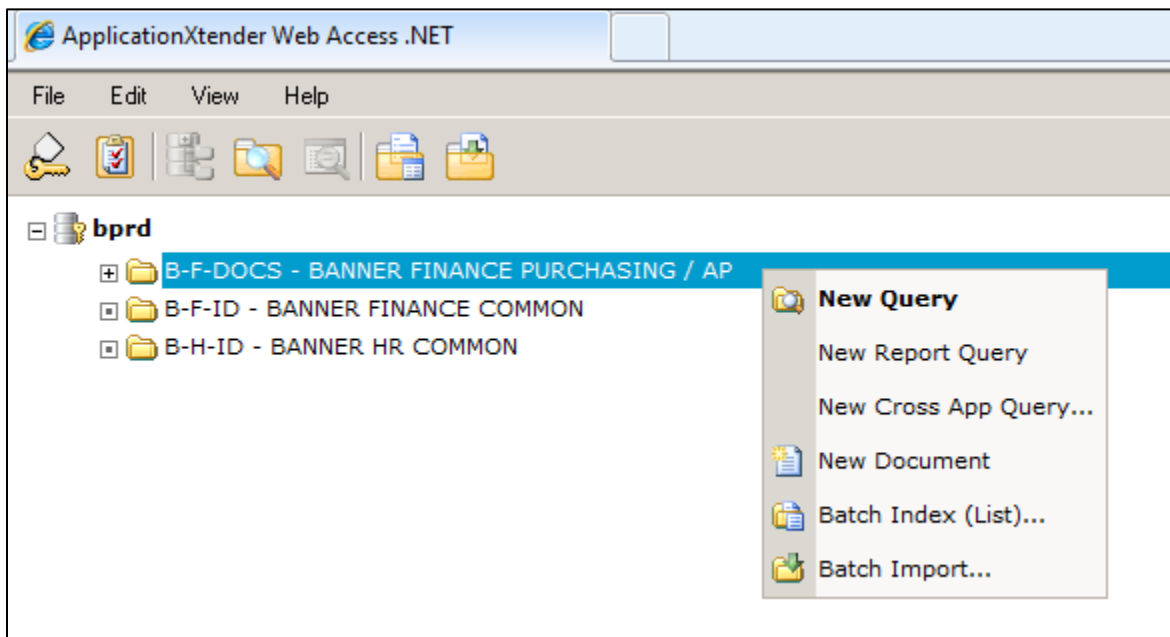
5. All pages should be clearly legible. If there are multiple pages in the document then you will see the previous and next page arrows. This allows you to go to each page easily to do your quality control.



6. If any of the above criteria are not met, the issue should be rectified before you continue. You may need to rescan the entire document, add pages from an additional file, or re-orient the pages after indexing.
- If you need to rescan the entire document,
    - exit your browser window without saving your work.
    - The original scanned PDF should be deleted at the same time to eliminate any confusion. See the specific instructions for deleting the source documents PDFs at the end of this section on page 20.
    - Start the process once again correcting the problem

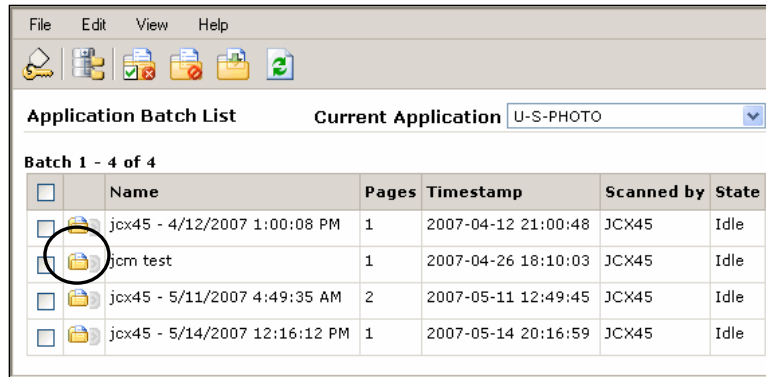
#### 4. Indexing

1. Are you still in a batch of documents?
  - a. If Yes, skip to step 5 of these indexing instructions.
  - b. If No, log in to BDMS, and continue to step 2 to open a batch.
2. In the Application List, right-click the B-F-DOCS application and select “Batch Index (List)...” from the menu.

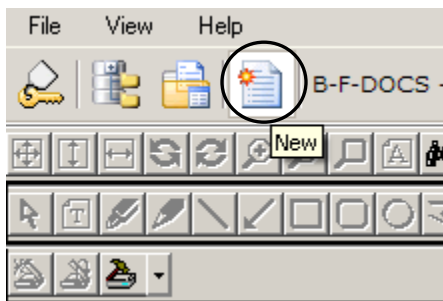


3. The Application Batch List screen appears.

4. Click the Open Batch for Indexing button, next to the batch you wish to index.



5. Once you have a document or batch open and quality control has been completed, click the New button to begin indexing.



6. The Index Name/Field Value screen appears.
7. In the Document ID field, enter the document number and press the Tab key.  
Information about the document is retrieved from Banner, automatically filling in many of the index fields.
8. In the Document Type drop-down field, select Invoice.
9. In the Security field, enter 00.



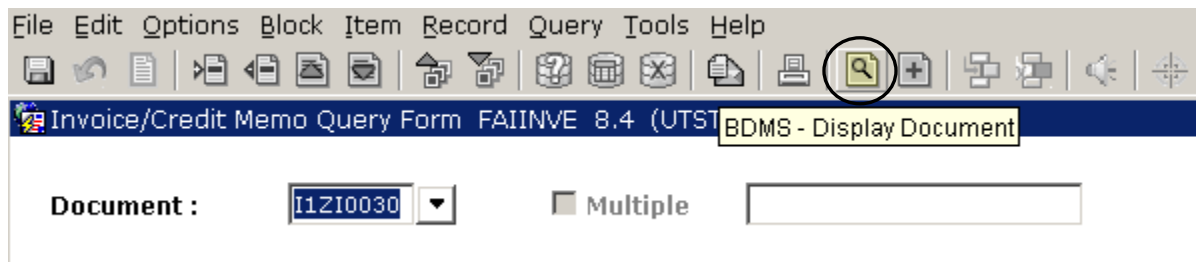
| Index name              | Description                                                              |
|-------------------------|--------------------------------------------------------------------------|
| <b>Document ID</b>      | <i>Enter the Banner Document ID - Begins with an I or S for Invoices</i> |
| Banner Doc Type         | Auto populated with Invoice                                              |
| <b>Document Type</b>    | <i>Enter Invoice</i>                                                     |
| <b>Transaction Date</b> | Date of Document ID Transaction                                          |
| Vendor ID               | USNH ID                                                                  |
| Vendor Name             | Vendor last name                                                         |
| First Name              | Vendor first name                                                        |
| PIDM                    | Vendor ID number                                                         |
| Routing Status          | An automated input field                                                 |
| Activity Date           | This field is auto filled with current date                              |
| Batch ID                | An automated input field                                                 |
| <b>Security</b>         | <i>Enter 00</i>                                                          |

10. When you have entered and verified the index terms, click the Save button.
11. When you click Save, you may see an error message, indicating that a unique key violation has occurred. This means that documentation for the document number already exists.
  - a. If you do not see this error, continue to step 13.
  - b. If you see this error, please refer to the user documentation titled “What do I do about this Unique Key Violation?” in the appendix.
12. The invoice has been imported, reviewed for quality, and indexed. It is now available to all Banner users who have access to that invoice.
13. If you need to re-orient any pages – continue to item 6 below.
14. If you are finished with all your BDMS activity you can now log out of BDMS to end your session.

## 6. Reorient pages as required

This may be needed if the document was not oriented correctly when imported. Once the document has been saved you can follow this process to correct the orientation. **You cannot reorient documents before they have been saved and indexed!** You need the document ID to follow this process.

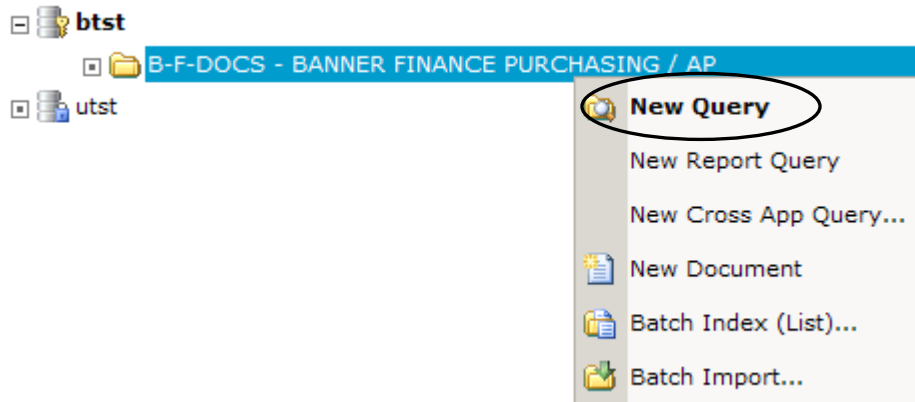
- You can go to the document from the FAAINVE, FAIINVE or other forms as appropriate. Enter the document number in the form and then select the BDMS – Display Document icon.



The screenshot shows the FAIINVE 8.4 (UTST) application window. The title bar reads 'Invoice/Credit Memo Query Form FAIINVE 8.4 (UTST)'. The menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, and Help. The toolbar contains various icons, with the 'BDMS - Display Document' icon (a magnifying glass over a document) circled in red. Below the toolbar, the 'Document :' label is followed by a text box containing 'I1ZI0030', a dropdown arrow, a 'Multiple' checkbox, and an empty text box.

- This will open up the document and all the associated pages.

- If already in BDMS right click on B-F DOCS and select New Query.

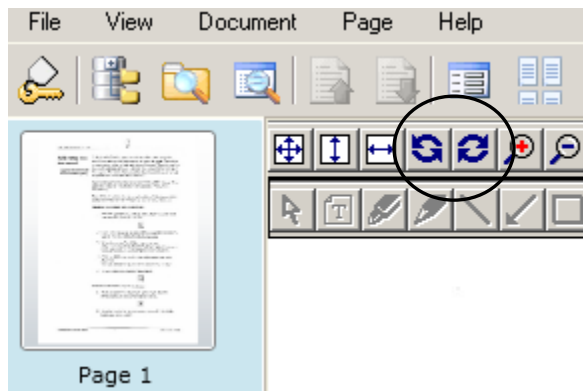


- Type the Doc number in the Document ID field and click on Submit in bottom right corner.

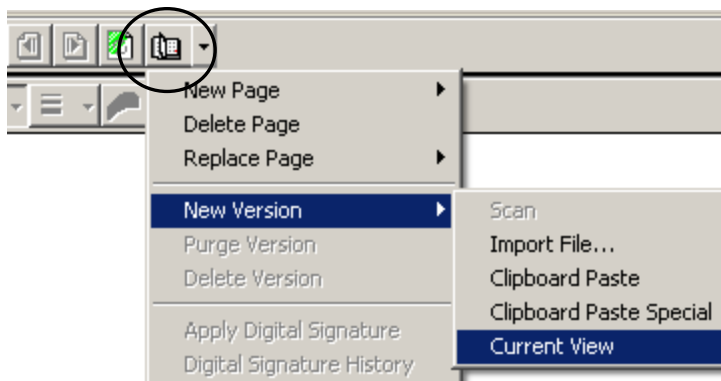
#### Query Criteria for Application 'B-F-DOCS'

| Show                                | Index Name      | Search Value |
|-------------------------------------|-----------------|--------------|
| <input checked="" type="checkbox"/> | DOCUMENT ID     | SU148557     |
| <input checked="" type="checkbox"/> | BANNER DOC TYPE | *            |

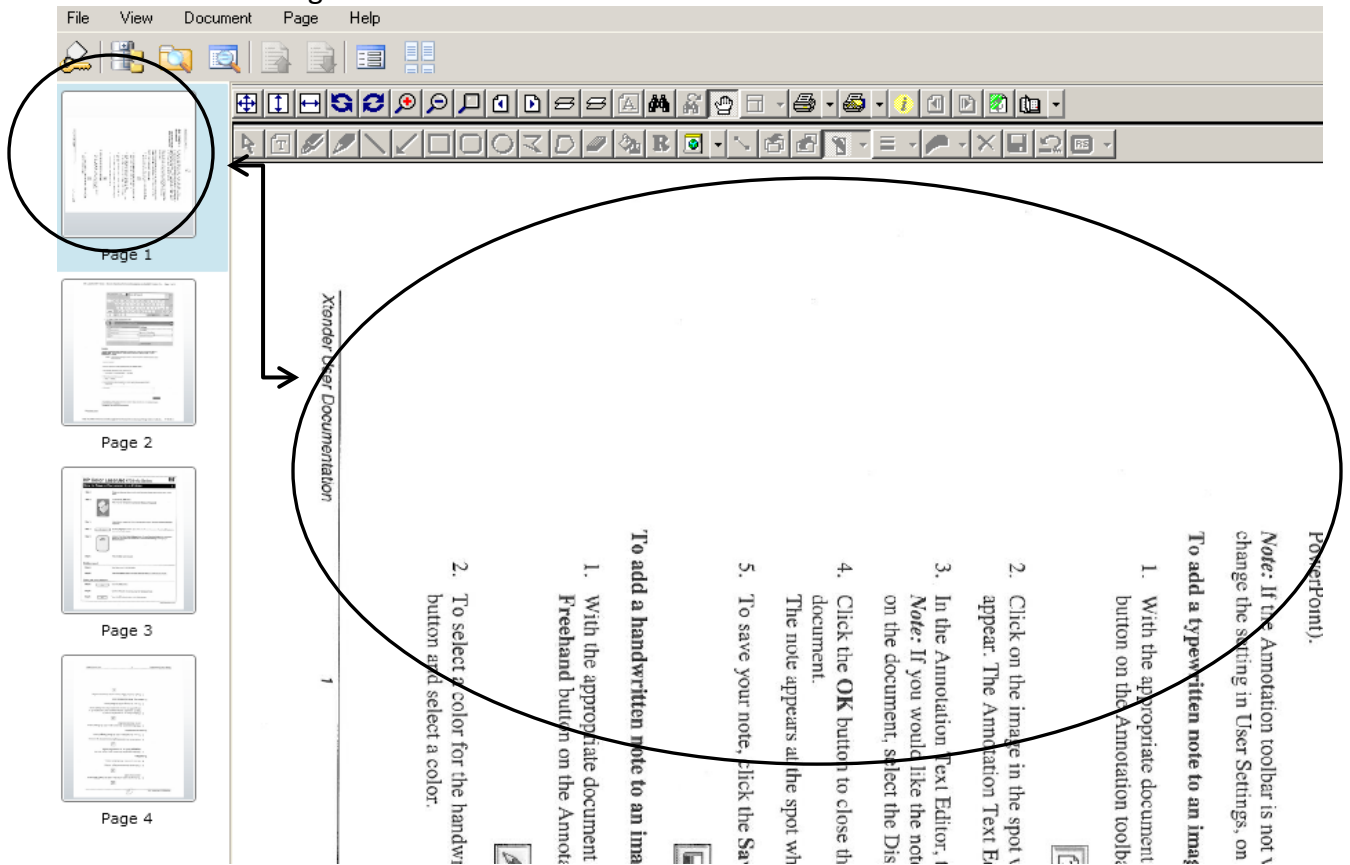
- This will open up the document and all the associated pages.
- Go to the page that needs to be reoriented.
- Click on the rotate right or left buttons until the orientation is correct.



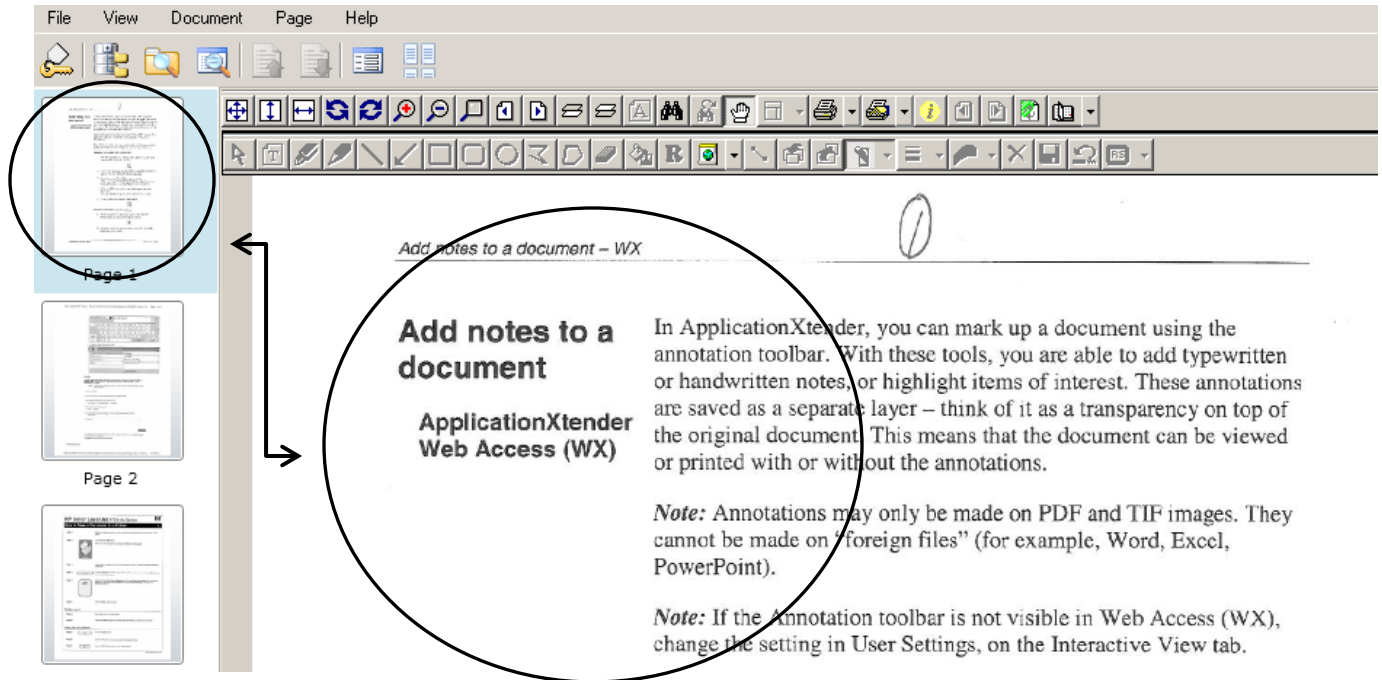
- Open the Page menu (open book) icon. Use the down arrow and the path **New Version>>Current View**



View before revising current view:

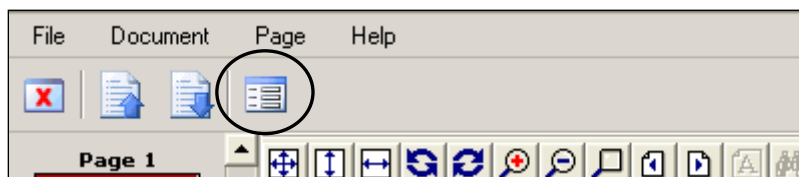


View after revising the current view:

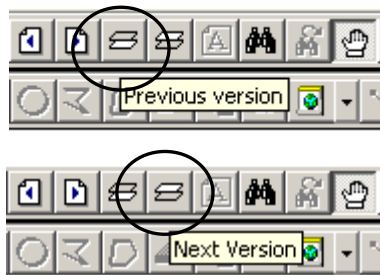


Orientation is corrected.

- Click on the Document index button



- Click on the modify button and then save. If you need to reorient more than 1 page in this document, repeat with each specific page.
- If you close out of the document and go back in you will see 2 new icons in the tool bar. These icons only show up for documents that have had their orientation changed.



These allow you to toggle between the most recent saved orientation of the page and the original orientation when it was originally imported.

## 7. Remove source document(s) from shared folder(s)

Once the scanned file has been imported into BDMS it needs to be deleted from the shared location. Go back into the path where the scanned documents are stored

(\\Louise.usnh.edu\\usnh\\Imaging\\deptname\\InvoiceImages)and delete any files that have already been imported to BDMS.

This is a shared area so to keep the area cleaner all items will be removed from the file server 14 days after the original scan date. We believe that this is sufficient time for the necessary tasks to be completed; however, we will review this practice after we have been using it for a time.

To delete a scanned source document:

1. Right mouse click on the Start button and choose Explore. Locate the path and folder the specific documents were in.
2. Left mouse click on the document you wish to delete.
3. A warning appears, asking “Are you sure you want to delete (the file name)?” Click the **Yes** button.
4. The document is deleted.
5. Close out of Explore.

This is probably a good time to destroy any original paper copies as well.

## **8. Keeping the paper documents**

1. Once you have scanned a package of journal voucher documents you need to keep this paperwork until all quality control work is verified.
2. The quality control and indexing processes should be completed within 2 weeks of scanning your documents.
3. Once you have completed quality control and indexed the document you will be able to go ahead and destroy the original source documents.

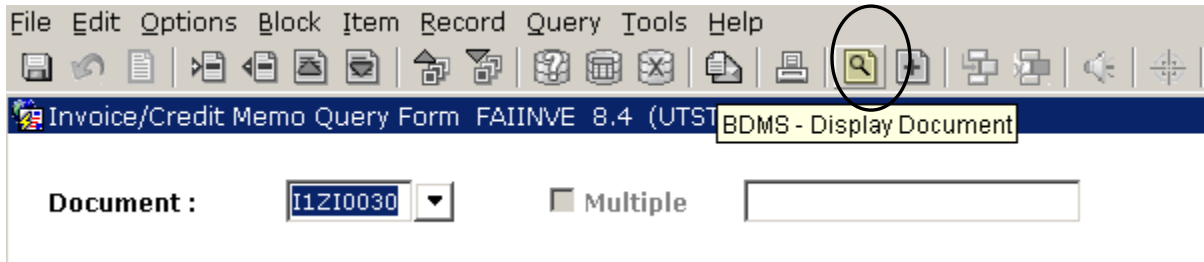
It is up to each area to determine their own comfort level in retaining the paper they have scanned. As indicated above, once the paper has been scanned, indexed and reviewed for quality the paper can be destroyed.

## Modifications to existing documentation

### 1. Change an index field

You must know your document number to perform this function.

1. In Banner log into the form of your choice.
2. Enter your document number.
3. Click on the BDMS – Display Document button.



4. The documentation for this item will open up in BDMS. (If there is no documentation in BDMS for this item you will see this message:



At this point you can close BDMS and go back into Banner and type an existing Document ID in the query field and click on Submit. )

5. Click the **Document Index** button on the toolbar.



6. Click the **Modify** button.

| Index Name       | Field Value         |
|------------------|---------------------|
| DOCUMENT ID      | I9ZR0016            |
| BANNER DOC TYPE  | INVOICE             |
| DOCUMENT TYPE    | INVOICE             |
| TRANSACTION DATE | 05-May-2009         |
| VENDOR ID        | 931805649           |
| VENDOR NAME      | MUSIC SALES CORP    |
| FIRST NAME       |                     |
| PIDM             | 5018019             |
| ROUTING STATUS   |                     |
| ACTIVITY DATE    | 2011-09-08 13:48:38 |
| BATCH ID         |                     |
| SECURITY         | 00                  |

Modify

- Change the appropriate fields.

**Note:** Some fields may be grayed out because they cannot be changed once they have been saved the first time.

- Click the **Save** button.

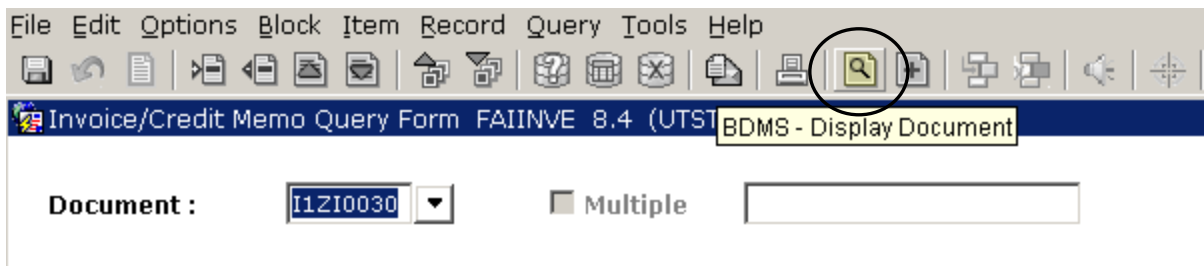
|                                                                           |                     |
|---------------------------------------------------------------------------|---------------------|
| ROUTING STATUS                                                            |                     |
| ACTIVITY DATE                                                             | 2007-11-29 14:08:55 |
| <input type="button" value="Save"/> <input type="button" value="Cancel"/> |                     |

- Log out of BDMS.

## 2. Adding new documentation to an existing index

If you need to add additional documentation to an indexed document, follow these instructions

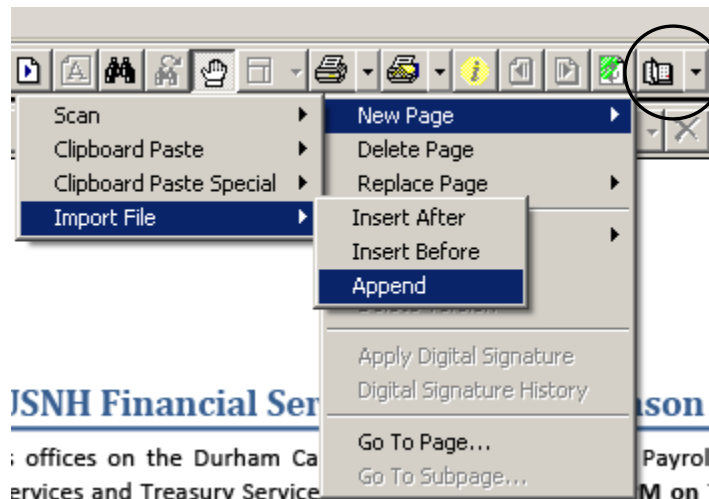
- In Banner log into the form of your choice.
- Enter your document number.
- Click on the BDMS – Display Document button.



4. Open the document index

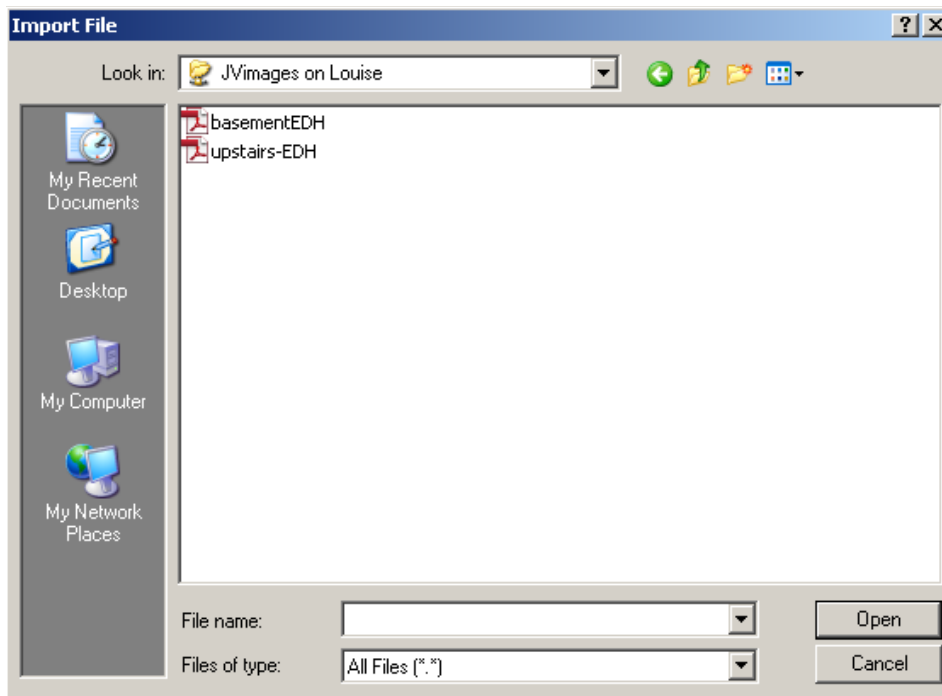


5. Open the Page menu (open book) icon. Use the down arrow and the path New Page>Import File>Append



6. Locate the file to imported and click open





7. The new page(s) will be automatically added to the end of the open document. Make sure the new page(s) pass all the quality control tests.
8. Click Modify and Save for the page to be added to the original document.
9. Log out of BDMS.

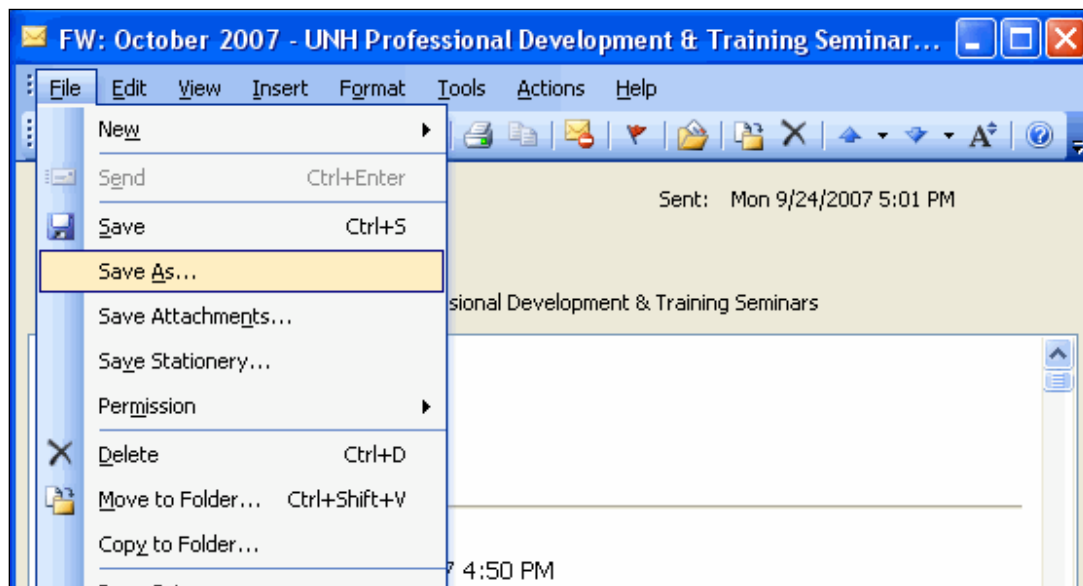
**Note: You cannot delete a page of documentation once it has been indexed and saved!**

## Appendix

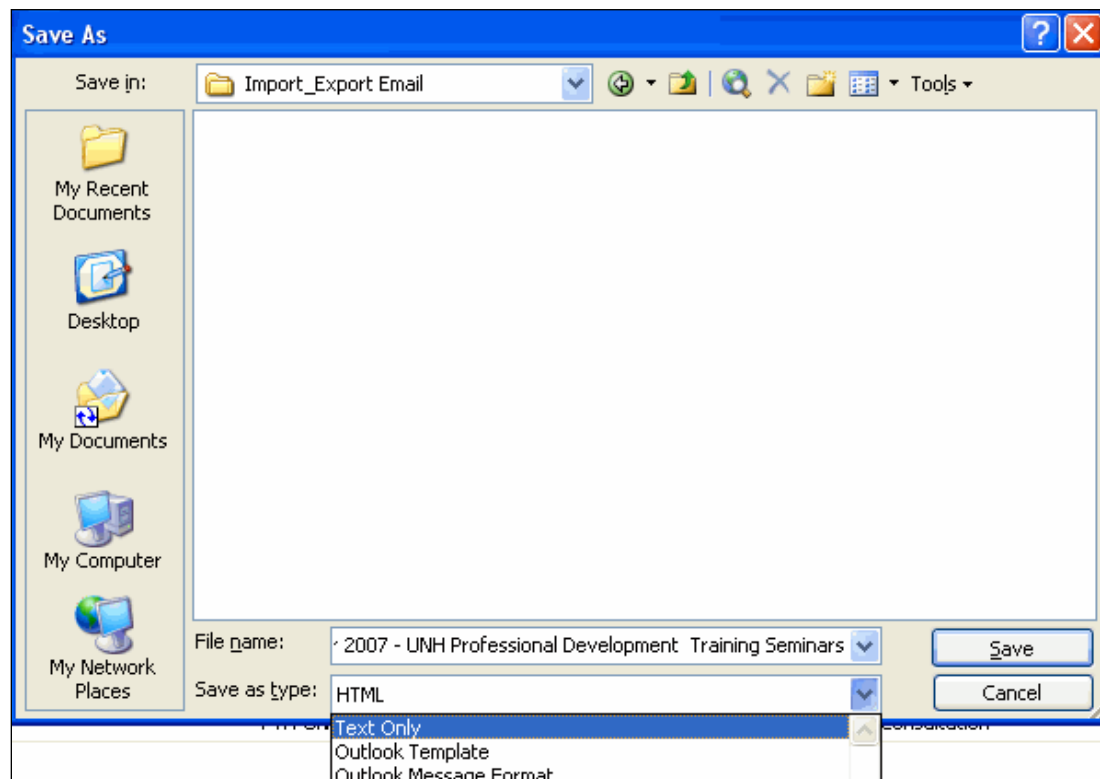
### Preparing an Email message for import

You need to save an email as a text file if you want to import it into BDMS.

From the email, follow the menu path: **File >> Save As...**



Navigate to the appropriate folder, name the file, and change the **Save as type** to **Text Only**.



Click the **Save** button.

If you did not save this to the USNH\\Louise\\JVimages folder then you will need to know where you have saved this text file.

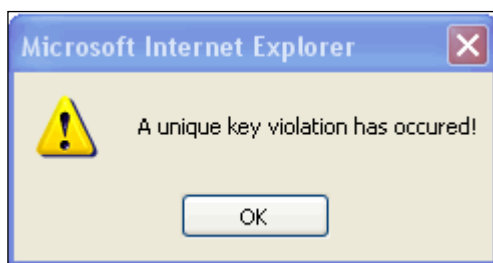
## What do I do about this Unique Key Violation error?

When you see a Unique Key Violation error message while you are indexing a document, it means there is already a document indexed with the same key pieces of information.

BDMS does not allow more than one document to be indexed with the same key fields, so you have 2 choices: 1) index with different information, or 2) attach the new document to the document which was previously indexed.

To attach the new document to the document which has already been indexed:


1. Click the **OK** button to acknowledge the error.




2. Click the Key Reference & Indexes button to search for other documents saved with the same index terms.



3. The documents are displayed in a table where the index terms had been. Scroll to the right to see information for the document, to confirm you found the one you're looking for.

| Document 1 - 1 of 1                                                                 |            |           |    |
|-------------------------------------------------------------------------------------|------------|-----------|----|
|                                                                                     | STUDENT ID | LAST NAME | F  |
|  | 123443333  | SMITH     | J. |

4. Once you find the document you want to add the new pages to, click the **Attach to Document** button.

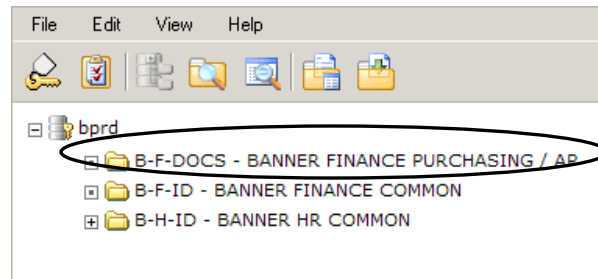
| Document 1 - 1 of 1                                                                 |            |           |    |
|-------------------------------------------------------------------------------------|------------|-----------|----|
|                                                                                     | STUDENT ID | LAST NAME | F  |
|  | 123443333  | SMITH     | J. |

5. This will attach the single page you're looking at, to the end of the document which had previously been indexed.
6. BDMS returns you to the regular indexing page, but now anything you attach will be attached to the previously indexed document. Continue indexing as you normally would.

## Search (query) for a document

To search for a document which has already been indexed:

1. Log into BDMS.
2. From the Application List, **right-click** the application (B-F DOCS) and select **New Query** from the menu.



3. The Query Criteria screen appears.  
**Note:** The index fields you see depend on the application you are in.
4. Enter the information you wish to search on.  
**Note:** Use the wild card (\*) to search with partial information. **Examples:**  
Entering **J1\*** in the Document ID field will return all documents that start with "J1".  
Entering **\*D65** will return all documents that end with "D65".  
Entering **\*4\*** will return all documents that contain a "4".
5. If necessary, click the **Range** button and enter the appropriate information to search on a range of values.



### **Example:**

Entering **Greater than or equal to J0** in the Document ID field will return only the documents which begin with "J0".

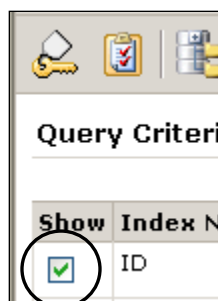
6. If necessary, click the **Search List** button and enter the appropriate information to search for multiple values at once.



### **Example:**

Entering **Smith or Jones** in the Last Name field will return documents for anyone whose name is Smith or Jones.

7. If you do not want a particular column to show on the Query Search Results screen, deselect the checkbox in the **Show** column.



8. Click the **Submit** button to run the query.
9. To view a document from the query results, click the **Open Document** icon.

| Query Results for Application 'B-S-ADMN' |        |                     |           |           |         |
|------------------------------------------|--------|---------------------|-----------|-----------|---------|
| Document 1 - 8 of 8                      |        |                     |           |           |         |
| <input type="checkbox"/>                 | PIDM   | DOCUMENT TYPE ▼     | LAST NAME | TERM CODE | APPLICA |
| <input type="checkbox"/>                 | 768571 | SUPPLEMENTAL INFO   | DIETZ     |           |         |
| <input type="checkbox"/>                 |        | MISC CORRESPONDENCE | ELLA      |           |         |
| <input type="checkbox"/>                 | 783127 | MISC CORRESPONDENCE | DORVAL    | 200601    | 1       |
| <input type="checkbox"/>                 | 936655 | MISC CORRESPONDENCE | GOSSELIN  | 200801    | 1       |

## BDMS Finance Application List

| Application Name                         | Description                                                                                                                                                                                                                                                                              |
|------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| B-F DOCS - BANNER FINANCE PURCHASING A/P | Includes the following document types: AP ACH, AP CHECK,CHECK,DIRECT CASH RECEIPT,ENCUMBRANCES,INVOICE,INVOICE PAYMENT,JOURNAL VOUCHER,PAYROLL CHECK,PAYROLL DDN,PURCHASE ORDER, AND REQUISITION                                                                                         |
| B-F-ID – BANNER FINANCE COMMON           | DEATH CERTIFICATE,PROOF OF CITIZENSHIP,CHECK,DIRECT CASH RECEIPT,EMAIL,ENCUMBRANCES,JOURNAL VOUCHERS                                                                                                                                                                                     |
| B-H-ID – BANNER HR COMMON                | ADVANCE,AFFIRMATIVE ACTION,BENEFIT BACKUP DOCS,BENEFIT FORMS,BENEFIT FORMS M&D,DEFER PAY,DELETED ITEMS,EMPLOYEE AUTH FORMS,EMPLOYEE INFO FORM,EMPLOYMENT AUTH FORMS,FAMILY STATUS CHANGE,I-9 FORM,IMMIGRATION DOCS,NAME\ADDRESS CHANGE,NRA,PAYROLL SUPPORT,VOLUNTARY DEDUCTIONS,W-2, W-4 |

## BANNER Document and Form List

| Document Type   | Access from these Banner Forms              |
|-----------------|---------------------------------------------|
| Journal Voucher | FGAJVCD, FGAJVCM, FGAJVCQ, FGIJSUM, FGIJVCD |

Invoice

FAAINVD, FAAINVE, FAAONLC, FAAPAYC, FAARUIV, FAINVE, FAINVL,  
FAIOINF