

How to use Banner Document Management in Self-Service Banner

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Version: March 29, 2018



BDMS will help with:

- ◆ Document management
- ◆ Easy access
- ◆ No more snail mail
- ◆ Approvers can see back up quotes, etc.

This training guide will show you how to view and upload supporting documentation to requisitions using Self-Service Banner (SSB).

Before you upload a document using Banner Document Management (BDM), you will need to do the following:

- A. Complete a requisition in Banner.
- B. Scan or convert the supporting documentation into a PDF. If you have different types of backup (e.g. quote, agreement, etc.), they will need to be scanned and uploaded separately.

NOTE: A quote is not required to process a requisition.

- C. Have your requisition number ready for reference and your supporting documentation downloaded on your computer.

Now you are ready to upload the documents to your requisition.

To access BDM through Self-Service Banner:

1. Login into MyPortal
2. Click on the Banner tab
3. Click on Self-Service Banner (SSB)

The screenshot displays the MyPortal interface with the 'Banner' tab selected in the top navigation bar. The main content area is divided into two columns. The left column contains two panels: 'Approval Alerts' and 'Banner Training'. The 'Approval Alerts' panel shows a message: 'You have no documents pending approval'. The 'Banner Training' panel provides information about interactive web training sessions and lists several categories: Banner Fundamentals, Finance, Financial Aid, Human Resources, and Student. The right column features a 'Banner Applications' panel with a list of links: Internet Native Banner, Banner Self-Service, Banner Reports, Banner Document Management Suite, Faculty Leave and Sub Pay, and Active Roster Administration. Two blue arrows point to the 'Banner' tab and the 'Banner Self-Service' link.

Home Employees Students Registration **Banner** Reports

Approval Alerts
You have no documents pending approval

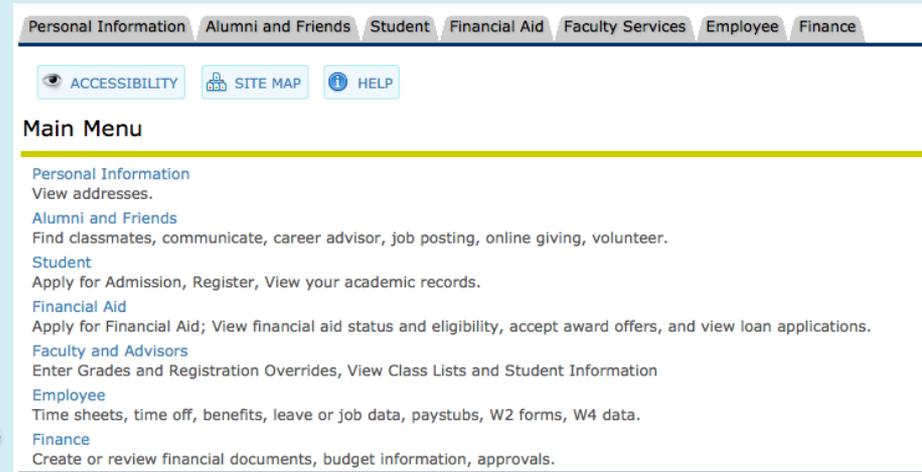
Banner Training
Interactive web training sessions are now available for Banner software components. Click on any of the URLs below for the training session you would like to view. It will load within your Luminis window. *Note: Flash Player is required.*
For user instructions [click HERE.](#)

- Banner Fundamentals
- Finance
- Financial Aid
- Human Resources
- Student

Banner Applications

- Internet Native Banner
Open a PROD INB session in a new window
- Banner Self-Service
Open the web services main menu
- Banner Reports
View, search, and print output from Banner jobs and processes
- Banner Document Management Suite
View and search archives of scanned documents
- Faculty Leave and Sub Pay
Advanced workflow for faculty leave reporting
- Active Roster Administration
Advanced faculty rosters

4. Click on Finance



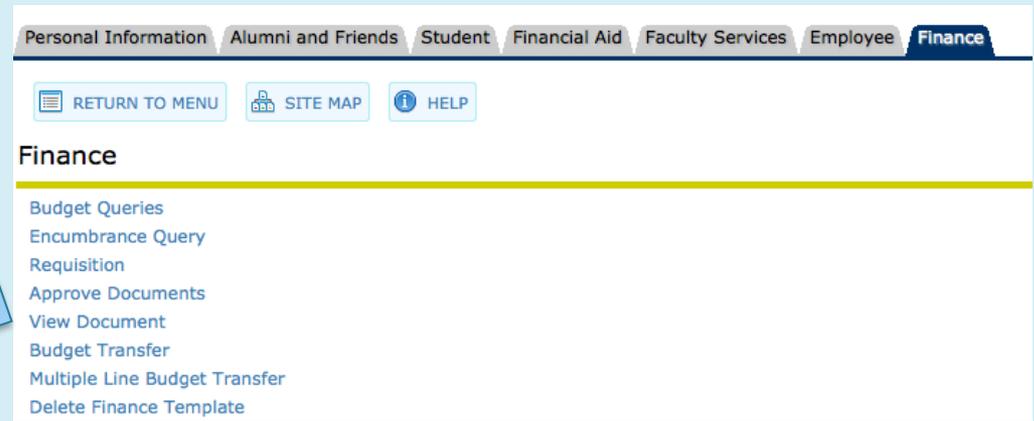
Personal Information Alumni and Friends Student Financial Aid Faculty Services Employee Finance

ACCESSIBILITY SITE MAP HELP

Main Menu

- [Personal Information](#)
View addresses.
- [Alumni and Friends](#)
Find classmates, communicate, career advisor, job posting, online giving, volunteer.
- [Student](#)
Apply for Admission, Register, View your academic records.
- [Financial Aid](#)
Apply for Financial Aid; View financial aid status and eligibility, accept award offers, and view loan applications.
- [Faculty and Advisors](#)
Enter Grades and Registration Overrides, View Class Lists and Student Information
- [Employee](#)
Time sheets, time off, benefits, leave or job data, paystubs, W2 forms, W4 data.
- [Finance](#)
Create or review financial documents, budget information, approvals.

5. Click on View Document



Personal Information Alumni and Friends Student Financial Aid Faculty Services Employee Finance

RETURN TO MENU SITE MAP HELP

Finance

- [Budget Queries](#)
- [Encumbrance Query](#)
- [Requisition](#)
- [Approve Documents](#)
- [View Document](#)
- [Budget Transfer](#)
- [Multiple Line Budget Transfer](#)
- [Delete Finance Template](#)

6. Select Requisition under the Choose Type drop down menu

View Document

To display the details of a document enter parameters then select View document Document Number to access the Code Lookup feature. This enables you to perform

Choose type: Requisition Document Number

Submission#: Purchase Order **Change Seq#** Reference

Display Accounting Information
 Yes No

Display Document/Line Item Text **Display Commodity Text**

All Printable None All Printable None

7. Enter your requisition number

8. Click on View Document

Choose type: Requisition Document Number R000###

Submission#: **Change Seq#** Reference Number

Display Accounting Information
 Yes No

Display Document/Line Item Text **Display Commodity Text**

All Printable None All Printable None

Now you are ready to upload documents.

9. Click on Upload Documents

View Document

Requisition Header

Requisition	Order Date	Trans Date	Delivery Date	Print Date	Total
R0009258	Aug 13, 2014	Aug 13, 2014	Sep 01, 2014		69,900.00

Origin: SELF_SERVICE

Complete: Y Approved: Y Type: Procurement

Cancel Reason: Date:

Requestor: Pamela C Eberhardt - sl 431006 Chief Technology Officer

Accounting: Document Level

Ship to: Foothill-De Anza CCD
District Receiving, Bldg D170
12345 El Monte Rd

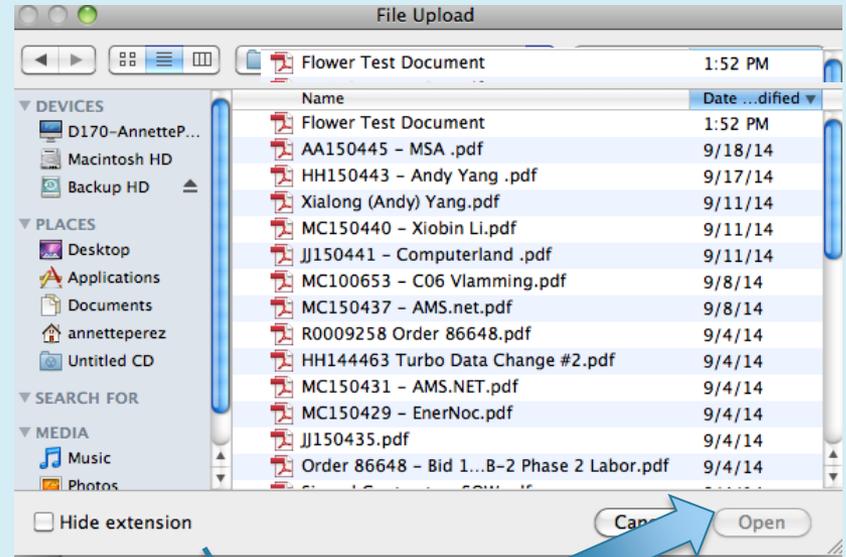
10. Click on Browse

Upload New Document

File* No files selected.

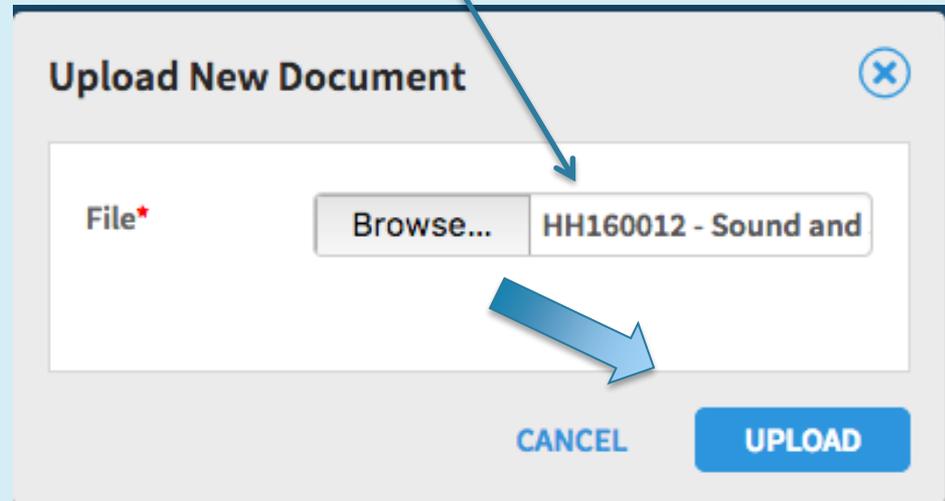
11. Click on the file you want to upload

12. Click on Open



Your file name will be listed next to the Browse button.

13. Click Upload



15. Now you are ready to index the file to your requisition:

Document ID:

Automatically populates your requisition number.

Banner Doc Type:

Automatically populates “Requisition.”

Document Type:

Select the type of supporting documentation you will be attaching to your requisition.

Transaction Date:

Automatically populates today’s date.

Vendor ID & Vendor Name:

If you entered a vendor on your requisition, these fields will automatically populate.

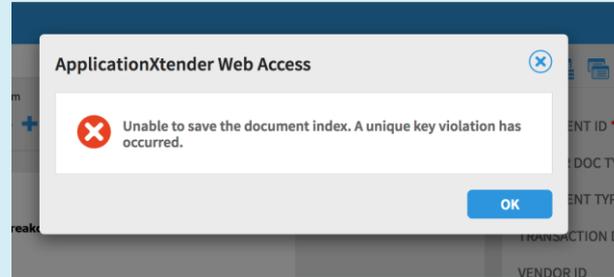
16. Click Save

DOCUMENT ID *	R0015119
BANNER DOC TYPE	REQUISITION
DOCUMENT TYPE *	
TRANSACTION DATE *	03-Mar-2017
VENDOR ID	00011488
VENDOR NAME	J & M TERMITE CONTROL INC
FIRST NAME	
PIDM	274969
ROUTING STATUS	
ACTIVITY DATE	Timestamp
VPDI_CODE	
DISPOSITION DATE	
DOCUMENT NAME	
CREATE NAME	

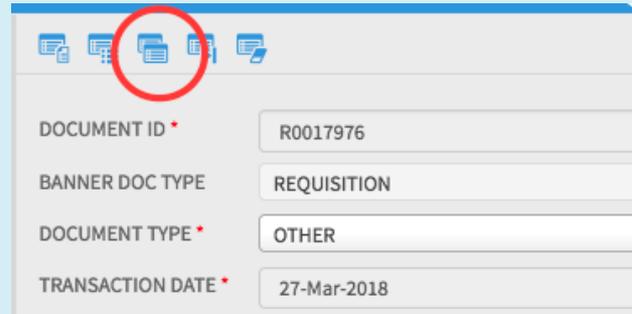
SAVE

If have already uploaded a document with the same index, you will see a dialogue box that looks like the below:

Click OK. Then click on



Select Key Reference
& Indexes Icon



Then hit the “Attach”
icon

Key Reference & Indexes

DOCUMENT ID	BANNER DOC TYPE	DOCUMENT TYPE	TRANSACTION DATE	VENDOR ID	VENDOR NAME
R0017976	REQUISITION		27-Mar-2018	1TIMEVEND	(NO NAME)
 R0017976	REQUISITION	OTHER	27-Mar-2018	1TIMEVEND	(NO NAME)

You can add other files to your previous or currently indexed document by clicking and dragging a document into your indexed document.

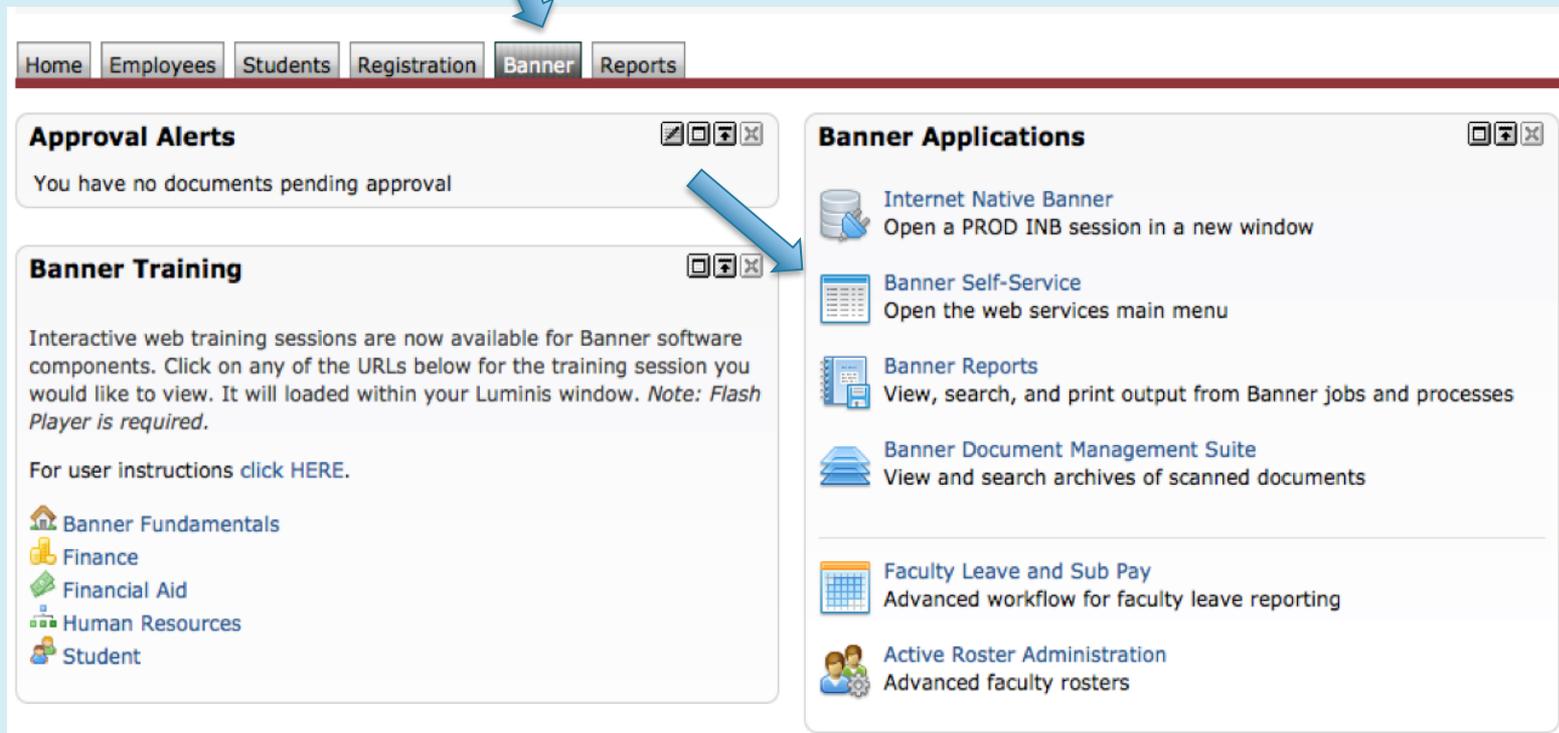
Simply pull up your indexed document, then click and drag the document you want to add. It will add the document to the back of your previously indexed document.

When you are ready to quit, simply close the window to quit BDM.

How to view uploaded documents using Self-Service Banner (SSB)

To view a document that has been uploaded to BDM, follow the steps below:

1. Login into MyPortal
2. Click on the Banner tab
3. Click on Self-Service Banner (SSB)



The screenshot shows the MyPortal interface with the 'Banner' tab selected in the navigation bar. The interface is divided into two main sections: 'Approval Alerts' and 'Banner Applications'.

Approval Alerts: You have no documents pending approval.

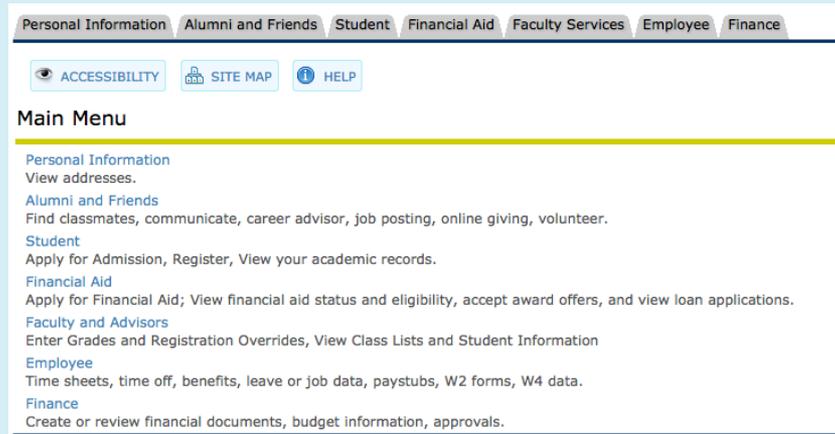
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Advanced workflow for faculty leave reporting
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Advanced faculty rosters

4. Click on Finance



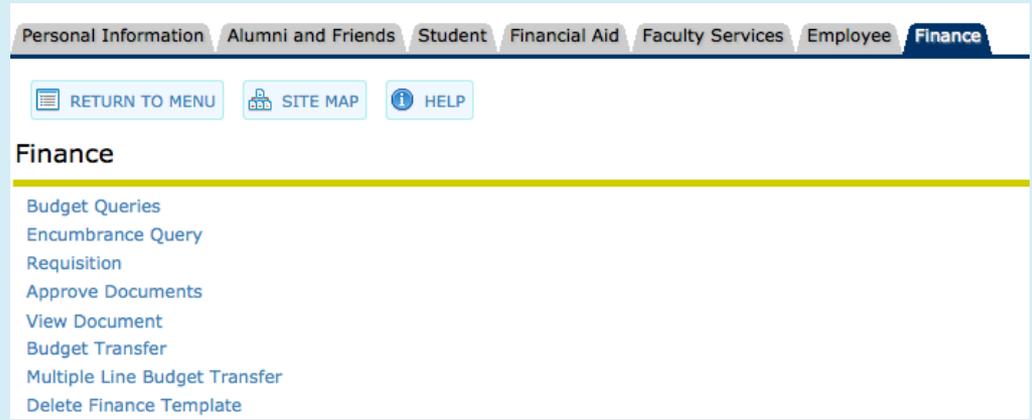
Personal Information Alumni and Friends Student Financial Aid Faculty Services Employee Finance

ACCESSIBILITY SITE MAP HELP

Main Menu

- Personal Information
View addresses.
- Alumni and Friends
Find classmates, communicate, career advisor, job posting, online giving, volunteer.
- Student
Apply for Admission, Register, View your academic records.
- Financial Aid
Apply for Financial Aid; View financial aid status and eligibility, accept award offers, and view loan applications.
- Faculty and Advisors
Enter Grades and Registration Overrides, View Class Lists and Student Information
- Employee
Time sheets, time off, benefits, leave or job data, paystubs, W2 forms, W4 data.
- Finance
Create or review financial documents, budget information, approvals.

5. Click on View Document



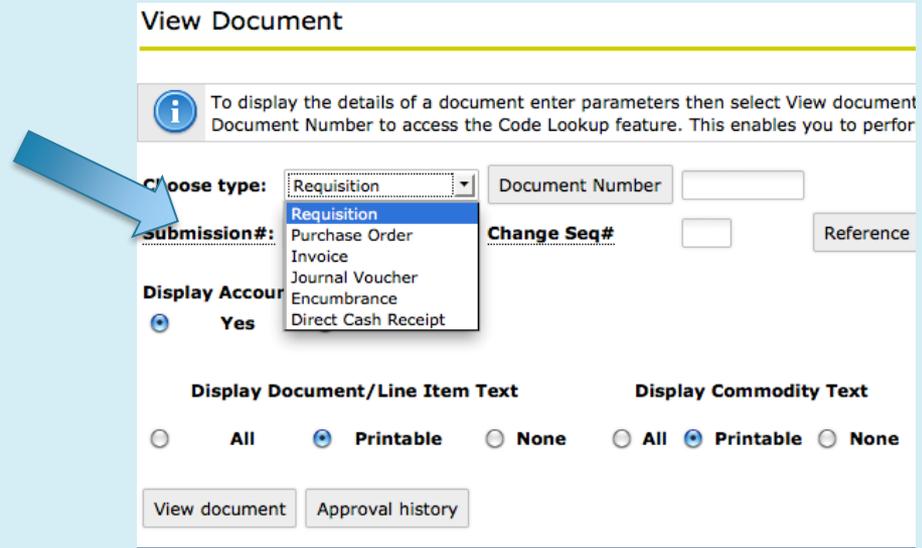
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Finance

- Budget Queries
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6. Select Requisition under the Choose Type drop down menu



View Document

To display the details of a document enter parameters then select View document Document Number to access the Code Lookup feature. This enables you to perform

Choose type:

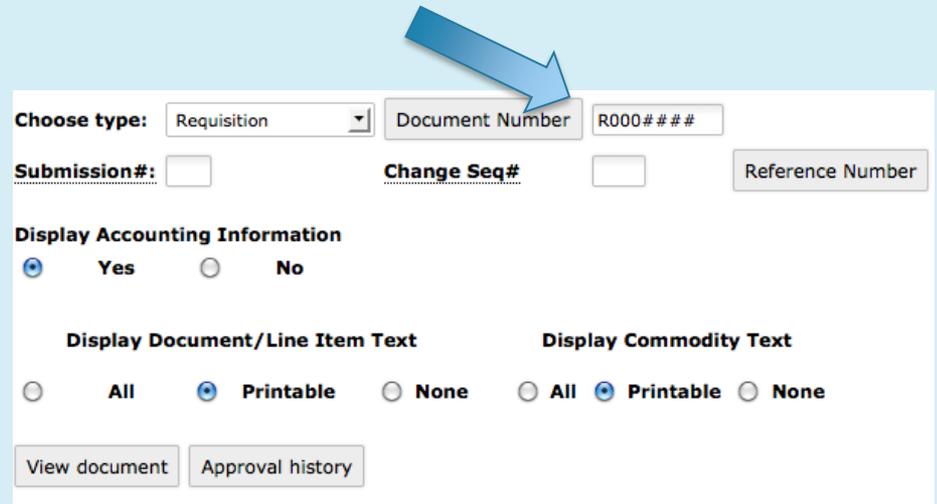
Submission#: **Change Seq#**

Display Accounting Information
 Yes No

Display Document/Line Item Text All Printable None

Display Commodity Text All Printable None

7. Enter your Requisition Number



Choose type:

Submission#: **Change Seq#**

Display Accounting Information
 Yes No

Display Document/Line Item Text All Printable None

Display Commodity Text All Printable None

8. Click on View Document

6. Click on Display Documents



View Document

Requisition Header

Requisition	Order Date	Trans Date	Delivery Date	Print Date	Total
R0009299	Aug 27, 2014	Sep 01, 2014	Sep 30, 2014		5,100.37

Origin:	BANNER				
Complete:	Y	Approved:	N	Type:	Procurement
Cancel Reason:				Date:	
Requestor:	Linda Lorraine Mahi	419000	Material Services		
Accounting:	Document Level				

If only one supporting document has been indexed to your requisition, the document will open up to view.

Page

Page 1 / 1 | Rotate | Zoom 100% | Annotation | Format | Actions

FREE YOUR COMPANY NAME HERE
 123 Main Street
 YOUR TOWN, STATE and ZIP
 PHONE: 123-4567

QUOTATION FORM

1001

TO _____

PLEASE INDICATE THE ABOVE NUMBER WHEN ORDERING

QUANTITY	DESCRIPTION	PRICE	AMOUNT

If you have indexed multiple supporting documents to a requisition, it will look like the below.

Document Management Results Page

Link	ID	Document Type	TYPE	Document ID
Display Document	R0015119	REQUISITION	OTHER	86582
Display Document	R0015119	REQUISITION	CONTRACTS/AGREEMENTS/LEASES	86382



7. Click on Display Document and your document you will be displayed.

ApplicationXtender Web Access

https://bandocdev.fhda.edu/AppXtender/datasources/PRODN/IDocument/?ParamEnc=28:69DA192D1A87C2642E24D05A25246914CBD59221A9C83A9B5E0E7A123

Page

Page 1 / 1

Rotate

Zoom 100%

Annotation

Format

More

FREE YOUR COMPANY NAME HERE
123 Main Street
YOUR TOWN, STATE and ZIP
PHONE 123-4567

QUOTATION FORM

1001

PLEASE INDICATE THE ABOVE NUMBER WHEN ORDERING

TO _____

QUOTATION DATE _____ SALES PERSON _____

INQUIRY DATE _____ INQUIRY NUMBER _____

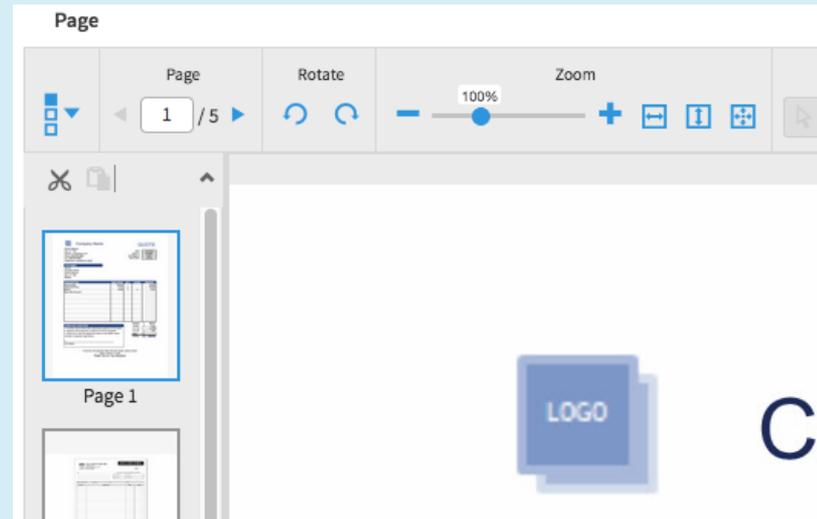
ESTIMATE/ SHIPPING DATE _____ SHIPPED VIA _____ P.O. # _____ TERMS _____

8. To change the order of the pages, click on the Show/Hide Thumbnail Button.



9. Click and drag the pages to the order you would like them.

10. A dialogue box will ask you to confirm the move.



11. When you are done viewing the document(s), close the window.

Frequent Issues using BDM

1. Your supporting documentation must be a PDF (no Excel/Word) and the file size limit is 20MB.
2. If you have uploaded a document incorrectly, please contact your Campus FF&E or FET coordinator or Purchasing Services for help.

Questions?



Thank you for your attendance.

For additional help or questions, please contact me at x6163.

