Banner Employee Training

Moraine Park Technical College

- Document Imaging for Financial Aid
- COURSE NUMBER (999-515)
- COURSE LENGTH (30 min.)
- PREREQUISITES
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BANNER PROCESS FLOWCHART

Banner Inputs – Employee must have general financial aid knowledge and change access to RRAAREQ.
Banner Outputs – Employee is able to navigate, scan, and index documents through BDMS.

COURSE DESCRIPTION

*Through this training, employee will learn to prepare scan/index financial aid documents as well as to view scanned financial aid documents that have been linked through RRAAREQ.*

SECURITY ROLE(S)

*Document Imaging View and Change Access*

LEARNING OBJECTIVES

*In This Banner Training, You will Learn How To:*

- Prepare, scan, and index documents in Banner.
- Correct documents that have been scanned and indexed incorrectly.
- View financial aid documents that have been scanned and indexed to Banner.
LEARNING PLANS

Prepare Documents for Scanning

- Group student documents into batches for scanning. Documents that are more than one page must be scanned together.
- All pages must contain the student's N number and name.
- Remove all staples and paper clips.
- Tape down post it notes.
- Remove blank pages.

Banner Scanning & Linking

Introduction

Use the following procedure to scan and link financial aid student files in Document Manager. Functionality is in place in Document Manager to allow the linking/indexing of certain Financial Aid documents to automatically update Banner data. When a Banner Financial Aid Tracking Requirements checklist document (for example, a supplemental form) is indexed in Document Manager, the tracking requirement is changed to reflect that the item is received.

Scanning a document

- Click on the Windows 7 start button in the lower left-hand corner and select all programs. Click on the ApplicationXtender Desktop Folder. Click on the Image Capture icon and enter your Banner login. Select B-R-TREQ - Banner Financial Aid Tracking REQ folder from the left navigation panel.

- Select scan from the top menu bar and select the scan page option to start scanning documents.
• Enter your batch name. Batch name must contain your initials and scan date. Click OK.

• Scanned documents will appear on the screen. Page through the final images results navigation at the bottom to assess scanned page quality. Delete blank pages using the delete page button located in the right panel navigation. To lighten or darken the pages, click on the lighten/darken tab at the top and select the manual radio button. Pages can be rotated using the Rotate/Flip button.
• Verify that all pages from the paper batch match the number of pages uploaded. If additional pages must be added or rescanned, click on the add or delete tab at the top and select add pages. Follow step 3 above to verify quality.

• Click on the finish button located in the left corner of the screen. A brief dialog box will appear that displays the upload progress. Click on File and Exit.
Indexing Scanned Documents

- Click on the Windows 7 start button in the lower left-hand corner and select all programs. Click on the ApplicationXtender Desktop Folder. Click on the Document Manager icon and enter your Banner login. Select B-R-TREQ - Banner Financial Aid Tracking REQ folder from the left navigation panel.

- Click on Utilities and Batch Index List from the top menu bar. A dialog box displays with the available batches. Select your batch from the list and click on the index button. The batch uploaded will display.
- Click on the new document icon in top menu bar that resembles a piece of lined paper. This will open the properties panel so you can link the file to the student.

- Enter student ID and hit the tab button. The student name, SSN, and DOB will prepopulate. Verify that the student ID matches the information on the document. If the ID is incorrect, click on the ID field and rekey the ID. Hit tab to update the other fields listed.

- Select Document Type from drop-down list. A list of document types is provided at the back of the procedure manual.
- Click on the Aid Year field and select the appropriate aid year for the document.
• Click on Tracking Requirement field and select appropriate tracking requirement. A list is provided in the procedure manual. If document is not linked to a tracking requirement, leave this field blank.

• If documentation provided for requirement is complete, select “Rules Based” Tracking status from the Tracking Status field. Leave this field blank if not linked to tracking requirement.

• If document is incomplete, select “I” in the Tracking Status field. Make a note on RHACOMM for this student. Leave this field blank if not linked to tracking requirement.
• Leave remaining fields blank and activity date pre-populated.
• Click Save. A dialog box displays a notice of the tracking requirement update in Banner.
You may be prompted to index another batch. Select the appropriate options and follow the steps outlined above. Otherwise, click on File, Exit.

If you want to confirm the update to the tracking requirement, log in to Banner; Navigate to RRAAREQ. Enter Student's ID number. Verify that the correct Tracking Requirement has been updated to “R”. Close RRAAREQ.

Correcting Indexes

Introduction

Use the following process to reindex documents that need corrections.

- Click on the Windows 7 start button in the lower left-hand corner and select all programs. Click on the ApplicationXtender Desktop Folder. Click on the Document Manager icon and enter your Banner login. Click on the new query icon in the upper tool bar.
- Verify that BR-TREQ application is highlighted on the left navigation. Enter the ID of the student’s document you wish to find. Click Search. The document(s) for that student should appear.
- Select Show Index by clicking on the icon in the top toll bar. On the top menu click on Document, then Copy or Move Pages.
- Create Batch in the application you would like document to be moved to. Select BR-TREQ if the file is stay in in the Financial Aid document drawer. Select Move. Document will disappear from screen view.
- Click on utilities and batch index list. Open the Batch name. Click Index.
- Re-index the document correctly using directions from indexing. Click Save.
- Verify that changes have been made by searching for the document and checking your work.
Importing an Electronic File

Introduction

Use the following process to import an electronic file into Document Manager.

- Click on the Windows 7 start button in the lower left-hand corner and select all programs. Click on the ApplicationXtender Desktop Folder. Click on the Document Manager icon and enter your Banner login. Select B-R-TREQ - Banner Financial Aid Tracking REQ folder from the left navigation panel.
- Click on Document, New, Import File
- Select file from the appropriate file location and click OK
- Enter student ID and hit the tab button. The student name, SSN, and DOB will prepopulate. Verify that the student ID matches the information on the document. If the ID is incorrect, click on the ID field and rekey the ID. Hit tab to update the other fields listed.

- Select Document Type from drop-down list. A list of document types is provided at the back of the procedure manual.
- Click on the Aid Year field and select the appropriate aid year for the document.
- Click on Tracking Requirement field and select appropriate tracking requirement. A list is provided in the procedure manual. If document is not linked to a tracking requirement, leave this field blank.
• If documentation provided for requirement is complete, select “Rules Based” Tracking status from the Tracking Status field. Leave this field blank if not linked to tracking requirement.

• If document is incomplete, select “I” in the Tracking Status field. Make a note on RHACOMM for this student. Leave this field blank if not linked to tracking requirement.
• Leave remaining fields blank and activity date pre-populated.
• Click Save. A dialog box displays a notice of the tracking requirement update in Banner.
• You may be prompted to index another batch. Select the appropriate options and follow the steps outlined above. Otherwise, click on File, Exit.
If you want to confirm the update to the tracking requirement, log in to Banner; Navigate to RRAAREQ. Enter Student's ID number. Verify that the correct Tracking Requirement has been updated to "R". Close RRAAREQ.

Add an Annotation in Document Manager

Introduction

Use the following process to annotate a scanned document.

- Open Document. Choose Annotate; New. Select the type of annotation you would like to use.
• Click on area you would like annotation to appear. A window for typed comments will appear.

• Type comments; click ok. Comments will appear in typed box where cursor had been placed
• Click on Annotate and uncheck show to hide the annotations on the document. Click on Annotate and check show to redisplay the annotations.
• Click on annotate, select to select the annotation. Select annotate delete to remove the annotation.
• Close document

Please note: Annotations may also be added as documents are indexed.
Deleting Documents

Introduction

Use the following process to delete a document in Document Manager.

- Verify that BR-TREQ application is highlighted on the left navigation.
- Enter the ID of the student’s document you wish to find. Click Search. The document(s) for that student should appear.
- In the Page menu, select Delete Version. Select Delete Selected Document(s).

Displaying/Viewing Documents

Introduction

Use the following process to view scanned and indexed documents in Banner. A Document Manager Display Documents icon has been added to the Banner toolbar.

This icon allows you to open Document Manager from within Banner and execute queries. It also allows auto querying of files based on the location of your cursor (touch point) within a Banner form.

- Open Banner. Navigate to RRAAREQ.
- Enter student ID number. Tab. Cursor MUST be in key block or in an aid year specific tracking requirement to display document (ENTERL will not generate results!).
- Click on the Icon

- Scanned documents list will appear. Select the appropriate document.
- Document will open on screen.
- Process document accordingly.
- File – Select “log out” (or hit the Gold Key icon).

- A dialog box will ask if you are sure – Select “ok”
- The Login screen displays. Select “cancel” – then select “yes” when prompted to close the window.
Running a Query from Banner

Introduction

Use the following process to query scanned and indexed documents in Banner.

1. Access the RRAAREQ form in Banner.
2. The cursor can be placed anywhere in the form, except for in an a tracking requirement that does not have an aid year associated with it.
3. Click the BDMS Query icon on the Banner toolbar. Your results are automatically displayed.

4. File – Select “log out” (or hit the Gold Key icon).

A dialog box will ask if you are sure – Select “ok”
The Login screen displays. Select “cancel” – then select “yes” when prompted to close the window.
EXERCISE 1: SCANNING AND INDEXING A DOCUMENT

Steps
Open Image Capture.
1. Scan a batch.
2. Check batch for quality.
3. Close batch and exit Image Capture.
5. Navigate to the previously scanned batch.
6. Select the Indexing Icon.
7. Enter the student’s ID and verify that the populated information is correct.
8. Select the appropriate document type, aid year, and tracking requirement.
9. Verify the selections.
10. Select Save.

EXERCISE 2: RUNNING QUERIES IN BDMS

Steps
1. Start a Banner session.
2. Navigate to the Requirements Tracking Form (RRAAREQ).
3. Enter a student ID.
4. Right-click the BDMS icon on the Banner toolbar. AX should now display the document indexed.
5. Close ApplicationXtender.

EXERCISE 3: CORRECTING INDEXES

Steps
1. Open Document Manager
2. Click on the new query icon in the upper tool bar.
3. Verify that BR-TREQ application is highlighted on the left navigation.
4. Enter the ID of the student’s document you wish to find. Click Search.
5. Select Show Index by clicking on the icon in the top tool bar.
6. On the top menu click on Document, then Copy or Move Pages.
7. Create Batch in the application you would like document to be moved to. Select BR-TREQ if the file is stay in in the Financial Aid document drawer.
8. Select Move. Document will disappear from screen view.
9. Click on utilities and batch index list. Open the Batch name. Click Index.
10. Reindex the document correctly using directions from indexing. Click Save.
11. Verify that changes have been made by searching for the document and checking your work.
PERFORMANCE ASSESSMENT TASKS

Employee must successfully scan, index, and retrieve a document in order to meet competencies.

Viewing a document:

<table>
<thead>
<tr>
<th>Student Id:</th>
<th>Question</th>
<th>Answer if Applicable</th>
<th>Competency Met</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Staff member navigates to RRAAREQ; enters student ID and appropriate aid year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Staff member selects BDMS icon</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>Staff member views document in Web Xtender</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>Staff member closes imaged document</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Scanning and indexing a document:

<table>
<thead>
<tr>
<th>Student Id:</th>
<th>Question</th>
<th>Answer if Applicable</th>
<th>Competency Met</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Staff member opens Image Capture.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>Staff member: Opens Document Manager. Navigates to the previously scanned batch.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>Staff member: Selects the Indexing Icon. Enters the student’s ID and verify that the populated information is correct. Selects the appropriate document type, aid year, and tracking requirement. Verifies the selections.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Staff member: Selects Save. Closes Document Manager.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# APPENDIX A: DOCUMENT AND TRACKING CODE TYPES

<table>
<thead>
<tr>
<th>Document Type Code</th>
<th>Paper or Electronic</th>
<th>Tracking Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archive Record</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>Award Offer Letter</td>
<td>E-Imported</td>
<td>NA</td>
</tr>
<tr>
<td>Ability to Benefit</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>Additional Loan Request</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>Award Letter-Revised</td>
<td>E-Imported</td>
<td>NA</td>
</tr>
<tr>
<td>Citizenship</td>
<td>P</td>
<td>CITZ</td>
</tr>
<tr>
<td>Consortium Agreement</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>Default Resolved</td>
<td>P</td>
<td>DEFAULT</td>
</tr>
<tr>
<td>Document Required</td>
<td>P</td>
<td>DOCREQ</td>
</tr>
<tr>
<td>DVR</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>Guardianship/Ward of Court</td>
<td>P</td>
<td>WARD</td>
</tr>
<tr>
<td>Indian Grant</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>ISIR</td>
<td>P/E</td>
<td>NA</td>
</tr>
<tr>
<td>Less than half letter</td>
<td>E-Imported</td>
<td>NA</td>
</tr>
<tr>
<td>Loans-Cancellation letter</td>
<td>E-Imported</td>
<td>NA</td>
</tr>
<tr>
<td>Loans-Exit</td>
<td>E-Imported</td>
<td>EXIT</td>
</tr>
<tr>
<td>Loans-Entrance/MPN</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>Loans-PLUS Loan Denial</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>Loans-private</td>
<td>P/E</td>
<td>NA</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>Missing Info Letter</td>
<td>E-Imported</td>
<td>NA</td>
</tr>
<tr>
<td>R2T4-Documentation</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>R2T4-Letter</td>
<td>E-Imported</td>
<td>NA</td>
</tr>
<tr>
<td>SAP-Academic Plan</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>SAP-APpeal/Documentation</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>SAP-Correspondence</td>
<td>E-Imported</td>
<td>NA</td>
</tr>
<tr>
<td>SAP-Worksheet</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>Scholarship-Check</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>Scholarship-Letter</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>Selective Service</td>
<td>P</td>
<td>SELSRV</td>
</tr>
<tr>
<td>Signature Page</td>
<td>P</td>
<td>SIGN</td>
</tr>
<tr>
<td>SSN-Parent</td>
<td>P</td>
<td>SSN2</td>
</tr>
<tr>
<td>SSN-Student</td>
<td>P</td>
<td>SSN</td>
</tr>
<tr>
<td>Special Condition Review</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>Summer application</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>Supplemental Form</td>
<td>P</td>
<td>SUPPL</td>
</tr>
<tr>
<td>TIP application</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>Third Party Billing Contract</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>Verification-Dependent</td>
<td>P</td>
<td>DPVVW12</td>
</tr>
<tr>
<td>Verification-Independent</td>
<td>P</td>
<td>IDVVW12</td>
</tr>
<tr>
<td>Verification-Parent W2</td>
<td>P</td>
<td>PW210</td>
</tr>
<tr>
<td>Verification-Parent's taxes</td>
<td>P</td>
<td>PTX10</td>
</tr>
<tr>
<td>Verification-Student W2</td>
<td>P</td>
<td>SW210</td>
</tr>
<tr>
<td>Verification-Student's taxes</td>
<td>P</td>
<td>STX10</td>
</tr>
<tr>
<td>Verification-Tax Attestation</td>
<td>P</td>
<td>TAXATS</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----</td>
<td>--------</td>
</tr>
<tr>
<td>Veterans-Benefit Information</td>
<td>P</td>
<td>NA</td>
</tr>
<tr>
<td>Veterans-DD214</td>
<td>P</td>
<td>VETER</td>
</tr>
<tr>
<td>Work study</td>
<td>P</td>
<td>NA</td>
</tr>
</tbody>
</table>