

ellucian™

Banner Document Management Release Guide

Release 8.5
January 2013



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Revision History

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Introduction

This guide documents the following enhancements that are being delivered in Banner® Document Management (BDM) 8.5:

- New product name
- Corporate rebranding
- BDM changes that support Banner Document Retention
- Compliance with internationalization (I18N) standards
- Tracking of context and parameter rules on Banner forms
- Changes related to Banner Travel and Expense Management

This guide also summarizes the problem resolutions that are being delivered in Banner Document Management 8.5.



Functional enhancements

This section describes the functional enhancements that are being delivered in Banner Document Management 8.5.

New product name

The Banner imaging and electronic document management product has a new name:

Old name: Banner Document Management Suite (BDMS)

New name: Banner Document Management (BDM)

This name change affects several BDM objects plus functionality in other Ellucian products.

Menu change

The Banner Document Management menu has a new name:

Old name: Banner Document Management Suite Administration System (*BDMS)

New name: Document Management (*BDM)

INB site map changes

The Internet-Native Banner (INB) site map, which is accessed from the Banner main menu, displays the new BDM product name and new BDM form names.

BDM form changes

The following forms have new names:

Form	Old Name	New Name
ERALINK	BDMS FinAid Requirements Linking	Document Management FinAid Requirements Linking
ESALINK	BDMS Student Admission Requirements Linking	Document Management Student Requirements Linking

Form	Old Name	New Name
ESIAUDT	BDMS Student Requirements Linking Audit	Document Management Student Requirements Linking Audit
ETVAXAP	BDMS Application Validation Form	Document Management Application Validation
ETVDTYP	BDMS Document Type Validation	Document Management Document Type Validation
EXABCXT	BDMS Context Determination Form	Document Management Context Determination
EXAINST	BDMS Systems Settings	Document Management Systems Settings
EXAPRID	BDMS Previous ID Rules Form	Document Management Previous ID Rules
EXARSLT	BDMS Error Results	Document Management Error Results
EXAUPRF	BDMS User Preference	Document Management User Preference

The following forms have additional changes that reflect the new product name:

Form	Change
ERALINK	The auto hints on several fields display the new product name.
ESALINK	The auto hints on several fields display the new product name.
ETVDTYP	The auto hint on the Document Type Code field displays the new product name.
EXABCXT	The list of values on the Form field displays the new form names.

BDM report change

The following BDM report has a new name:

Old name: BDMS Context Rules Report (EXRBCXT)
 New name: BDM Context Rules Report (EXRBCXT)

Changes to BDM Garbage Collection Service

The installation directory, executable, and window for the BDM Garbage Collection Service have new names. This service is used with Banner Travel and Expense Management.

Changes to other Ellucian products

The new BDM product name affects other Ellucian products as follows:

- **INB Tools menu** - The INB Tools menu includes a menu option that allows users to access Banner Document Management from any Banner form. The Tools menu now displays the new BDM product name. This change is being delivered in Banner General patch p1-190Y3SH_gen8050204.
- **INB toolbar buttons** - The INB toolbar buttons allow users to access Banner Document Management from any Banner form. Tool tips for these toolbar buttons now display the new BDM product name. This change is being delivered in Banner General patch p1-190Y3SH_gen8050204.
- **INB alert messages** - Alert messages are displayed when a password is synchronized and when a user is not set up in ApplicationXtender. These messages now use the new BDM product name. This change to goqolib.fmb is being delivered in General 8.6.
- **System indicator description** - The System Indicator Validation Form (GTVSYSI) defines the various Banner systems that are used at your site. The description of the BDM system indicator is now *Banner Document Management*.
- **Source code for admissions checklist items** - The Application Checklist Source Validation Form (STVCKSR) defines the source codes for admissions checklist items. STVCKSR now includes *BDM* as a new source code. The previous source codes *BDMS* and *BXS* are still included on STVCKSR but are no longer used.
- **Description for admissions checklist items** - The Admission Application/ Checklist Summary Form (SAAACKL) displays information about admissions checklist items for an ID. For checklist items that originate from BDM, the item description was changed from *BDMS <user name>* to *BDM <user name>*.

Corporate rebranding

Visible SunGard Higher Education branding is being removed or changed to Ellucian branding in the following locations:

- Splash screen and default installation directory for the INB-AX Bridge
- Installation directory, executable, and file names for the BDM Garbage Collection Service, which is used with Banner Travel and Expense Management

BDM changes that support Banner Document Retention

Banner Document Retention (BDR) is a new Ellucian product, planned for delivery in 2013 as a separately-licensed, companion product to Banner Document Management. BDR provides for the disposal of documents that are stored in ApplicationXtender. As preparation for the delivery of BDR, the following changes are being delivered in Banner Document Management 8.5.

New index field

The new DISPOSITION DATE index field is being added to all BDM baseline applications.

Form changes

The Document Management Application Validation Form (ETVAXAP) has the following new field:

Field	Description
Document Type Field Number	Field number in the application that contains the DOCUMENT TYPE index field. Banner Document Retention, if installed, uses this field number to locate the application's document type when it defines disposition rules.

The Document Management Systems Settings Form (EXAINST) has the following new fields:

Field	Description
Web Services Root	Root URL that is used to invoke ApplicationXtender Web Services, if installed at your site, via a browser.
Document Retention Installed	Check box that indicates whether Banner Document Retention is installed at your site. This indicator is set when BDR is installed and cannot be changed.

Compliance with internationalization standards

The following forms are being modified to comply with internationalization (I18N) standards:

ERALINK	Document Management FinAid Requirements Linking
ESALINK	Document Management Student Requirements Linking
ESIAUDT	Document Management Student Requirements Linking Audit
ETVAXAP	Document Management Application Validation
ETVDTYP	Document Management Document Type Validation
EXABCXT	Document Management Context Determination
EXAINST	Document Management System Settings
EXAPRID	Document Management Previous ID Rules
EXARSLT	Document Management Error/Result
EXAUPRF	Document Management User Preferences

Tracking of context and parameter rules

A new auditing feature allows you to track the way BDM users use context and parameter rules to access ApplicationXtender from Banner forms. If enabled, this auditing feature logs the types of context and parameter rules that are executed from Banner. You can see what rules are used, who uses the rules, the forms where rules are used, and how frequently the rules are used.

This additional insight into system usage can help your institution optimize the rules and better manage BDM. This feature also helps Ellucian understand what features and rules are most valuable to users.

This enhancement addresses RPE 1-18XNC3N. This enhancement was delivered in patch rpe1-18xnc3n_ext8040002.

Steps for tracking the usage of rules

Use the following steps to track the usage of context and parameter rules.

1. Access the Document Management Systems Settings Form (EXAINST).
2. Select the **Enable Context Rules Auditing** check box to turn on tracking and write audit information to the EXBAUDT table.
3. Save the change.

4. When you are ready to review audit information, dump the contents of EXBAUDT to an Excel or .csv file.
5. Use the Excel or .csv file to create custom reports.

Form changes

The Document Management System Settings Form (EXAINST) has the following new field:

Field	Description
Enable Context Rules Auditing	Check box that indicates whether auditing of context and parameter rules is enabled:
	<i>selected</i> Auditing is enabled. Audit information is written to the EXBAUDT table.
	<i>cleared</i> Auditing is not enabled.

Changes related to Banner Travel and Expense Management

If Banner Travel and Expense Management is already installed at your site, you do not need to do anything when you upgrade to BDM 8.5. None of the changes in BDM 8.5 affect your current integration between BDM and Banner Travel and Expense Management.

If, however, Banner Travel and Expense Management is not installed at your site and you choose to install it after you upgrade to BDM 8.5, integrating the two products is slightly different than in the past.

- When you update institutional settings in Banner Travel and Expense Management, you must enter values in the **Imaging Login** and **Imaging Password** fields. Before Banner Travel and Expense Management 8.6, the labels on these fields were **BDMS Login** and **BDMS Password**.
- When you install the BDM Garbage Collection Service, you must use instructions that reflect new file, executable, and directory names. New names accommodate corporate rebranding and the new BDM product name. Make sure that you use the latest installation instructions in the *Banner Travel and Expense Management 8.6 Handbook*.

Technical enhancements

This section describes the technical enhancements that are being delivered in Banner Document Management 8.5.

Note

Some objects were changed for copyright information only. These objects do not need to be compiled at this time. The `copyright.txt` file, which is packaged in `ext80500u.trz`, lists these objects. ■

New product name

Changes to the following objects support the new name for Banner Document Management.

Changed package

Changes to the following packages support the new product name:

```
efkimag.sql/efkimal.sql  
eoksecl.sql/eoksecl.sql  
eokslnk.sql/eokslnk.sql  
ewkwrs1.sql  
ewkwtow.sql/ewkwtow.sql
```

Changed Java package name

The name of the Java package that is used for single sign on functionality was changed to reflect the new product name. The BDM Java files that contain this Java package must be installed into the Banner database. The `ewkwtow.sql/ewkwtow.sql` and `eoksecl.sql/eoksecl.sql` packages contain Java-based stored procedures and must be recompiled to refer to the new Java package name. The zip file that contains the BDM Java files was renamed from `bxsjavaproc.zip` to `bdmjavaproc.zip`.

New scripts

The following new scripts support the new product name:

Script	Description
<code>egtvsysiu_080500.sql</code>	Changes the description of BDM on GTVSYSI
<code>estvcksr_080500.sql</code>	Changes the descriptions of the <i>BDMS</i> and <i>BXS</i> source codes on STVCKSR

Other changed objects

Changes to the `gumappl.mmb` binary object support the product name change on the Internet-Native Banner main menu. This change is being delivered in Banner General patch `p1-190Y3SH_gen8050204`.

Changes to the BDM Garbage Collection Service `setup.msi` file support the product name change. This setup file is packaged in the `gcsvc.zip` file.

Changes to the `INBAXBridgeSetup.msi` file support the product name change for the INB-AX Bridge.

Corporate rebranding

Changes to the BDM Garbage Collection Service `setup.msi` file support the company branding change. This setup file is packaged in the `gcsvc.zip` file.

Changes to the `INBAXBridgeSetup.msi` file support the company branding change for the INB-AX Bridge.

BDM changes that support Banner Document Retention

Changes to the following BDM objects support the new Banner Document Retention (BDR) product.

Changed tables

The following new table columns support the BDM changes for BDR:

Column	Description	Format
ETVAXAP_DOCTYP_FLDNUM	Field number in the application that contains the DOCUMENT TYPE index field.	VARCHAR2
EXBINST_DOC_RTN_IND	Indicator that indicates whether Banner Document Retention is installed at your site.	VARCHAR2
EXBINST_WEB_SRVCS_ROOT	Root URL that is used to invoke ApplicationXtender Web Services, if installed at your site, via a browser.	VARCHAR2

New scripts

The following scripts support the BDM changes for BDR:

Script	Description
aedt_appid_080500_01.sql	Adds the DISPOSITION DATE index field to all baseline applications
aedt_appid_080500_02.sql	Creates an index on the DISPOSITION field
eaeadefsi_080500.sql	Inserts the flag settings into the ae_adefts table for the addition of the DISPOSITION DATE field to all columns
eexbinstu_080500.sql	Sets EXBINST_DOC_RTN_IND to <i>N</i>
etvaxap_080500_01.sql	Adds ETVAXAP_DOCTYP_FLDNUM to ETVAXAP
etvaxap_080500_02.sql	Adds a comment to ETVAXAP_DOCTYP_FLDNUM
exbinst_080500_01.sql	Adds EXBINST_DOC_RTN_IND to EXBINST
exbinst_080500_02.sql	Adds EXBINST_WEB_SRVCS_ROOT to EXBINST
exbinst_080500_03.sql	Adds a comment to EXBINST_DOC_RTN_IND

Script	Description
exbinst_080500_04.sql	Adds a comment to EXBINST_WEB_SRVCS_ROOT
otgmgr_080500_01.sql	Grants access privileges to BANINST1 from the OTGMGR schema

Compliance with internationalization standards

Changes to the following objects support compliance with internationalization (I18N) standards.

Changed forms

Changes to the following forms support compliance with I18N standards:

```
eralink.fmb  
esalink.fmb  
esiaudt.fmb  
etvaxap.fmb  
etvdtyp.fmb  
exabcxt.fmb  
exainst.fmb  
exaprid.fmb  
exarslt.fmb  
exauprf.fmb
```

Changed template forms

Changes to the following template forms support compliance with I18N standards:

```
eoqmenu.fmb  
eoqolib.fmb
```


Changed packages

Changes to the following packages support compliance with I18N standards:

```
enbtfisc0.sql
enbtposh0.sql
enbtposh2.sql
enttpcls0.sql
enttpcls2.sql
eokpril.sql
eokpse1.sql
epttecls2.sql
esctcrse2.sql
esstsect2.sql
esttsubj0.sql
esttsubj2.sql
esttterm2.sql
esttterm4.sql
```

Changed library

Changes to `eoqep1s.pll` support compliance with I18N standards.

Tracking of context and parameter rules

Changes to the following objects support the tracking of context and parameter rules.

New table

The new BDM Context Parameter/Rule Audit Table (EXBAUDT) supports the tracking of context and parameter rules. EXBAUDT includes the following columns:

Column	Description	Format
EXBAUDT_FORM_NAME	Banner form associated with the context rule	VARCHAR2
EXBAUDT_BLOCK_NAME	Block associated with the context rule	VARCHAR2
EXBAUDT_ITEM_NAME	Item (field) associated with the context rule	VARCHAR2

Column	Description	Format
EXBAUDT_ITEM_VALUE	Item (field) value associated with the context rule	VARCHAR2
EXBAUDT_AX_APPNAME	BDM application associated with the context rule	VARCHAR2
EXBAUDT_SAVED_QUERY	Name of a public query that is saved in ApplicationXtender and executed from the current Banner form context	VARCHAR2
EXBAUDT_DOCUMENT_TYPE	Document type code associated with the context rule	VARCHAR2
EXBAUDT_CNTXT_SRCH_CRITERIA	Search criteria parameters associated with the context rule	VARCHAR2
EXBAUDT_ACTION	BDM button or action that was used to view or add a document	VARCHAR2
EXBAUDT_DATA_ORIGIN	Source system that created or updated this record	VARCHAR2
EXBAUDT_SURROGATE_ID	Surrogate ID for this record	NUMBER
EXBAUDT_VERSION	Optimistic lock token for this record	NUMBER
EXBAUDT_VPDI_CODE	Code for the entity to which this record belongs if Multi-Entity Processing is implemented	VARCHAR2
EXBAUDT_USER_ID	User who created or last updated this record	VARCHAR2
EXBAUDT_ACTIVITY_DATE	Date when this record was created or last updated	DATE

Changed table

The following new table column supports the tracking of context and parameter rules:

Column	Description	Format
EXBINST_ENABLE_CNTEXT_AUDITING	Indicator that determines whether auditing of context and parameter rules is enabled	VARCHAR2

Changed packages

Changes to the following packages support the tracking of context and parameter rules:

`eokaudt.sql/eokaud1.sql`

Changed library

Changes to the `eoqep1s.pll` PL/SQL library support the tracking of context and parameter rules.

New scripts

The following scripts support the tracking of context and parameter rules:

Script	Description
<code>exbaudt_0804001_01.sql</code>	Creates EXBAUDT
<code>exbaudt_0804002_01.sql</code>	Adds comments to EXBAUDT
<code>exbinst_0804002_01.sql</code>	Adds EXBINST_ENABLE_CNTEXT_AUDITING to EXBINST
<code>exbinst_0804002_02.sql</code>	Adds a comment to EXBINST_ENABLE_CNTEXT_AUDITING

Changes related to Banner Travel and Expense Management

The `create_bf_tvlexp_app.xml` file was updated to include the DISPOSITION DATE index field to support the new Banner Document Retention product. This file is used only for new integrations between BDM and Banner Travel and Expense Management. If your institution previously integrated the two products, the BDM 8.5 upgrade handles the insertion of the new DISPOSITION DATE index field.

Problem resolutions

Banner Document Management 8.5 delivers the following problem resolutions. For more information, refer to the problem resolutions file (`bdm80500resolutions.txt`) that is delivered with this document. Information in the text file is extracted from the Customer Support Center just before the product release and may include additional defects that were resolved after this release guide was finalized.

Object	Number	Summary
EWKWRSLT	1-16LV88L	In the BDM integration with Self-Service Banner (SSB), the BDM Results page was not formatted correctly when using the Cascade theme. If the school logo was added to the beginning of the page, the page title overlaid the school logo.
See “Compliance with internationalization standards” on page 16.	1-17B9WQ5	Several BDM forms and packages did not comply with internationalization (I18N) standards.
Documentation	1-19I592G	Documentation for the scope modifier on the Document Management Student Requirements Linking Form (ESALINK) was unclear.
EXRAXPA EXRBCXT	1-19NYI83	New Banner Financial Aid forms for aid year 1314 were required to handle context and parameter rules.

