BDM: Viewing Invoices via Banner Document Management

**General Information**
You must be granted access to utilize BDM Services, and must also have the Web Extender loaded onto your computer station before BDM Services will work properly. ITS grants these services, but you must gain approval from your BUD before being granted access. And as always, all Banner-related questions may be sent to bannerhotline@odu.edu

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| 1. Access the Services/Account Requests Page on the ITS website.  
   ◆ This page will walk users through how to electronically request a Banner Account, BDM access, or any other account access.  
   ◆ Request the following access for BDM capabilities:  
     ➢ Be sure to include justification for obtaining access  
     ➢ Under Banner Classification Accesses Needed, request FIN_EVERYONE and list ALL BUDGETS (including any ledger 6 budgets!) for which you will need access | [https://www.odu.edu/ts/access/monarchkey/online-account](https://www.odu.edu/ts/access/monarchkey/online-account) |
| 2. Access the BDM Account Request Form on the ITS website.  
   ◆ Complete all parts of the form it its entirety.  
   ◆ When completing the form, under the Finance B-F_Docs Row, mark an A in the Viewers and AIR columns (see sample below).  
   ◆ Be sure to print, sign, and date the second page of this request form.  
   ◆ Your Budget Unit Director will also need to approve your request form. | [https://www.odu.edu/content/dam/offices/oec/docs/bdms_acctrequest.pdf](https://www.odu.edu/content/dam/offices/oec/docs/bdms_acctrequest.pdf) |
| 3. In addition, a Service Now Incident must be submitted so the WebEx [Web Extender] application may be installed at your computer station. | [https://oduprod.service-now.com](https://oduprod.service-now.com) |

| How to View Invoice Images: |
|----------------------------------|-----------------------|
| **Actions and Steps** | **Helpful Tips & Tricks** |
| 4. Upon entering into an appropriate Financial Form (i.e.: FOIDOCH) where BDM viewing is available, select the Retrieve Button in the toolbar. You may also select Tools > Retrieve Documents.  
   ◆ NOTE: The invoice will only become viewable if it is scanned and indexed! | **Retrieve Button:**  
   [![RETRIEVE](https://example.com/retrieve_icon.png)](https://example.com/retrieve)  
   **HELPFUL TIPS & TRICKS:** You must highlight the Document Type field for which you would like to see the original document (i.e.: see sample screenshot on Page 2) |
| 5. Upon selecting the Retrieve Button, you will be taken to a screen containing the scanned image of the document.  
   ◆ From this screen, you may navigate through each page of the document.  
   ◆ When you have finished viewing the invoice, close the application by clicking the RED X [unlike when using other Banner Applications!]  
     ➢ If a Response Window pops up asking if you would like to close the window, select YES. | **HELPFUL TIPS & TRICKS:** Be sure to make note of the number of pages within the selected document, located at the Auto Hint/Status Line on the screen. |
| 6. **HELPFUL TIP:** An Error Message Response Window may pop up explaining that there is no invoice or document scanned and indexed for your selection. Simply click OK. [There is no document to view.] | All invoices were scanned when processed by Accounts Payable as of September 1, 2011. If you receive the error message, it is likely the invoice was not implemented after this date. |
Helpful Tips & Tricks:

◆ Your cursor must be in the Document Code field to access the scanned image.

Sample Screenshot: Viewing the Image

When you are finished viewing the image, hit the "X" on the Application/Document Web tab to navigate back to Banner XD.