

# Sponsored Projects Accounting BDMS

Fall 2010

# BDMS Overview

- Banner's Document Management System
- Documents launched from Banner
- Provides imaging & document management
- Certified by the State of New Mexico
- Administered by certified individuals in Financial Systems Administration (FSA)

# BDMS Documents:

DOC TYPE NUMBER	DOCUMENT NAME	ORIGINATOR	CUSTODIAN	XTENDER DOC TYPE	NEW FILE NAME	MOD FILE NAME	SUB FILE NAME
1	OGC/SPA checklist	OGC	S. Burlingham	CHECKLIST	NEW1	MOD1-n	SUB1-n-v
2	New Fund Request Form	OGC	S. Burlingham	NEWFUND	NEW2	MOD2-n	
3	GCA Form	OGC	S. Burlingham	GCA	NEW3	MOD3-n	
4	CAS Template	OGC	S. Burlingham	CAS	NEW4	MOD4-n	
5	Contract/Award	OGC	S. Burlingham	AWARD	NEW5	MOD5-n	SUB5-n-v
6	Budget	OGC	S. Burlingham	BUDGET	NEW6	MOD6-n	SUB6-n-v
7	Proposal	OGC	S. Burlingham	PROPOSAL	NEW7	MOD7-n	
8	RFP	OGC	S. Burlingham	RFP	NEW8		
9	Banner Print Screens	SPA	S. Burlingham	PRINT SCREENS			
10	Invoices	SPA	C. Armendariz	INVOICES			
11	Payments	SPA	B. Castillo	PAYMENTS			
12	Other correspondence Includes mail and special documentation	SPA	C. Armendariz	OTHER			
13	Final Memo/Reports	SPA	C. Armendariz	FINAL			
14	Terming Checklist	SPA	Term Team	TERM			
15	Contract Summary	SPA	C. Armendariz	KSUM			

# BDMS Documents Defined:

#	Document Name	Indexing	Document Type Includes	Sys Admin Annotation
1	<b>OGC/SPA Checklist</b>		Emails/Modification Revision/New Funds/Checklist	Date_Grant_Fund
2	<b>New Fund Number Req</b>	-	Emails	Date_Grant_Fund_Index
3	<b>GCA Form</b>		Emails/Invoice Distribution	Date_Grant_Fund
4	<b>CAS Template</b>		Emails	Date_Grant_Fund
5	<b>Award</b>		Emails, Modifications	Date_Grant_Fund
		-	Internal Awards	Date_Grant_Fund
		Q #/PO#	Subcontracts/Modifications	Date_Grant_Fund_Index
		Q #/PO#	Purchase Order with SPA Subcontract Form	
6	<b>Budget</b>		Email/Budget Modifications	Date_Grant_Fund
7	<b>Proposal</b>		Email/Proposal Modifications	
		-	Internal Award Proposals/Modifications	Date_Grant_Fund
8	<b>RFP</b>		Emails/Modifications	
		-	Internal Award RFP/Emails/Modifications	
9	<b>Banner Print Screens</b>		Set up: FRAGRNT-all tabs; FRAEVGA-all events	
10	<b>Invoices</b>		Banner Financials/Collections Status/Inv Log	
			Emails/Invoice Support	
		Fund	PSL Grant requires separate inv at the fund level	
11	<b>Payments</b>	-	Email/Agency Payment	
		Q #/PO#	Email/Subcontract Payments/Direct Pay Requests	
12	<b>Other</b>		Email/Grant Diary/File Log	
13	<b>Final Memo/Reports</b>		Emails/Correspondence /Closeout Reports	
14	<b>Terming Checklist</b>		Emails/Correspondence	
15	<b>Contract Summary</b>			

# BDMS Administration

- Once scanned and proofed, paper documents are destroyed by a certified company
- SPA's security prevents deletion of scanned images
- FSA administers the destruction and deletion of paper and scanned documents

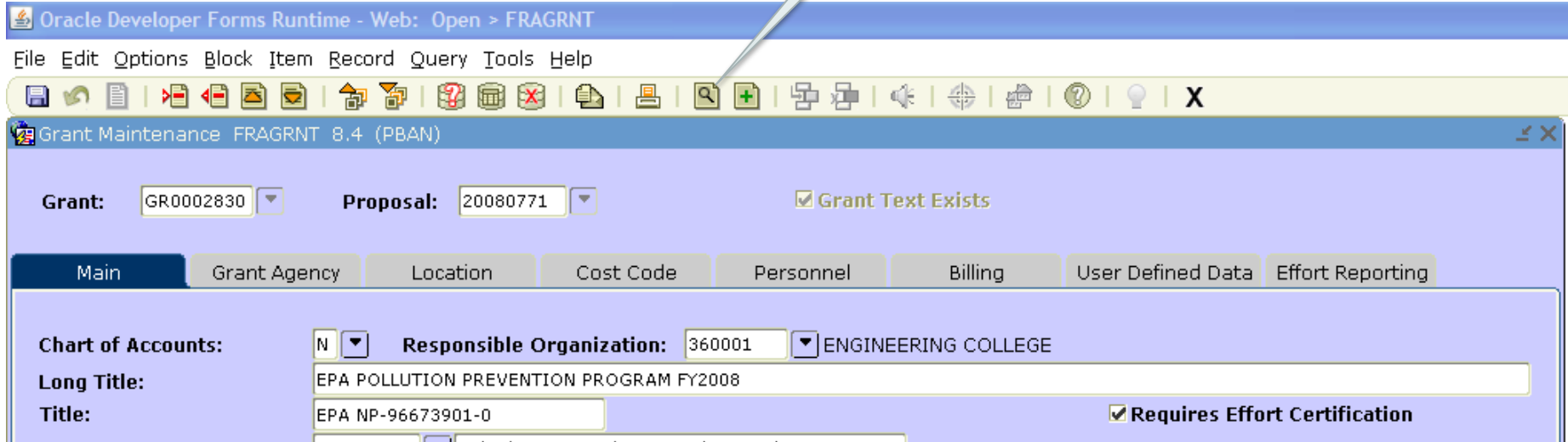
# BDMS Access

- Email SPA at [SPA@nmsu.edu](mailto:SPA@nmsu.edu)
- Approved request is forwarded to FSA
- Notice of access is emailed
- Must have access to Banner Finance

# BDMS Access

- FRAGRNT is used to access BDMS through Banner
- First time log-in requires synchronizing user name and password (FSA can assist)

# BDMS Access



Oracle Developer Forms Runtime - Web: Open > FRAGRNT

File Edit Options Block Item Record Query Tools Help

Grant Maintenance FRAGRNT 8.4 (PBAN)


Grant: GR0002830 Proposal: 20080771  Grant Text Exists

Main Grant Agency Location Cost Code Personnel Billing User Defined Data Effort Reporting

Chart of Accounts: N Responsible Organization: 360001 ENGINEERING COLLEGE

Long Title: EPA POLLUTION PREVENTION PROGRAM FY2008

Title: EPA NP-96673901-0  Requires Effort Certification

1. Log on to Banner.
2. Open the Grant Maintenance form, **FRAGRNT** and display the grant information.
3. To access the documents that have been stored electronically for the grant, click on the **Banner BDMS Solutions** button. 



# BDMS Access

File Edit View Options Help

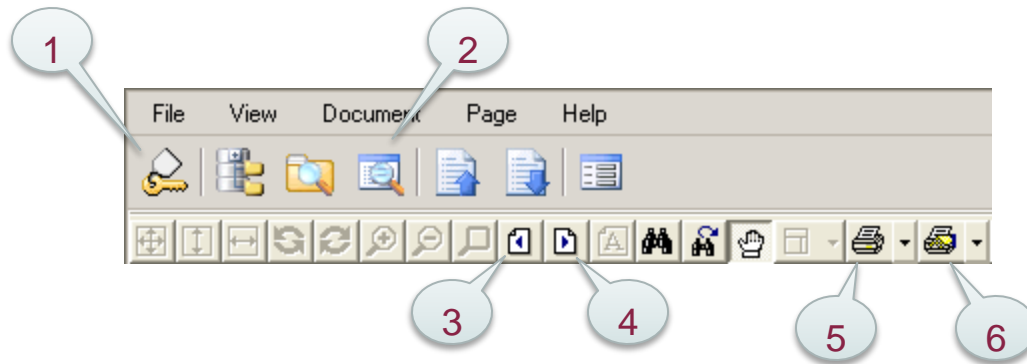
Query Results for Application 'B-F-GRNT'

Document 1 - 8 of 8

<input type="checkbox"/>	<a href="#">GRANT CODE</a>	<a href="#">GRANT TITLE</a>	<a href="#">COAS CODE</a>	<a href="#">DOCUMENT TYPE</a>	<a href="#">RESPONSIBILITY CODE</a>	<a href="#">PROPOSAL CODE</a>	<a href="#">AGENCY ID</a>	<a href="#">AGENCY PIDM</a>	<a href="#">AGEN</a>
<input type="checkbox"/>	GR0002830	EPA NP-96673901-0	N	RFP	360600	20080771	800094159	99479	UNITE
<input type="checkbox"/>	GR0002830	EPA NP-96673901-0	N	OTHER	360600	20080771	800094159	99479	UNITE
<input type="checkbox"/>	GR0002830	EPA NP-96673901-0	N	BUDGET	360600	20080771	800094159	99479	UNITE
<input type="checkbox"/>	GR0002830	EPA NP-96673901-0	N	AWARD	360600	20080771	800094159	99479	UNITE
<input type="checkbox"/>	GR0002830	EPA NP-96673901-0	N	CAS	360600	20080771	800094159	99479	UNITE
<input type="checkbox"/>	GR0002830	EPA NP-96673901-0	N	GCA	360600	20080771	800094159	99479	UNITE
<input type="checkbox"/>	GR0002830	EPA NP-96673901-0	N	NEWFUND	360600	20080771	800094159	99479	UNITE
<input type="checkbox"/>	GR0002830	EPA NP-96673901-0	N	CHECKLIST	360600	20080771	800094159	99479	UNITE

4. Click on the **Open Document** button  for the document you wish to view.

# Using BDMS



1. Logout – log out of before closing the window.
2. Query Results – go back to the list of documents for the grant.
3. Previous Page – go back to the previous page of the current document.
4. Next Page – go to the next page of the current document.
5. Print current page – print the page currently displayed on the screen.
6. Print document – print the entire document that is currently opened.

# BDMS Files

Grant Date	Electronic File	Paper File
Awarded 10/31/08 forward	X	
Awarded prior to 10/31/08	X	X
Termed File as of 10/31/08		X
Termed Files as of 3/1/09	X	

# BDMS Projects:

- With current resources, scan the current paper files older than 10/31/08 that are on-going
- Scan older grants as they end and are termed

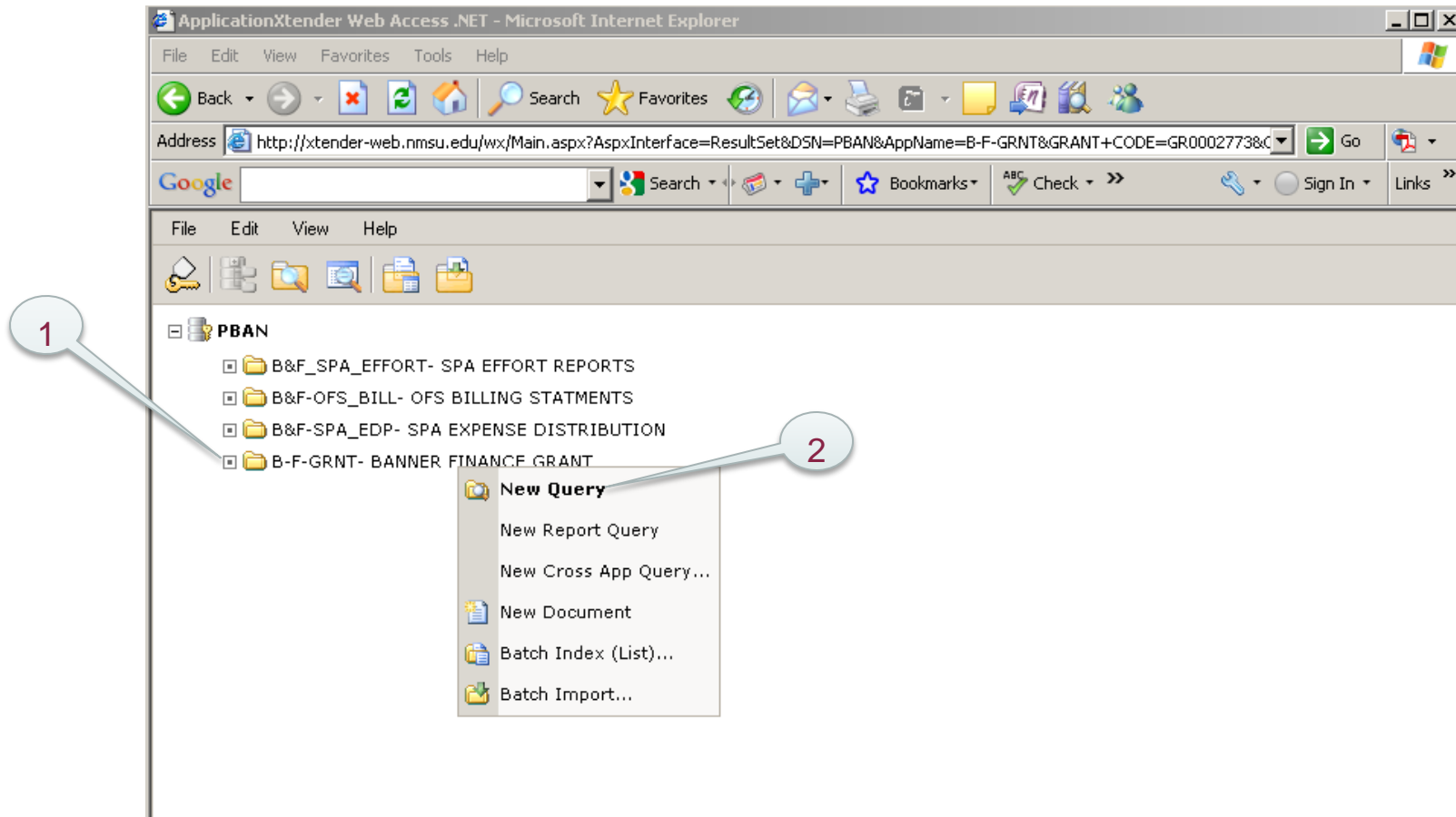
# BDMS Notations

- SPA adds notations to file documents
- Helps navigate through documents
- Refer to “SPA – BDMS Documents Defined”
- Documents are images
- Images are not searchable
- Indexing is searchable

# BDMS Queries

- By Document Type
- By Grant
- Invoices
- Subcontract (Q or PO #)

# BDMS View:



1. Right Click on “B-F-GRNT-BANNER FINANCE GRANT
2. Click on “New Query”

# BDMS View:

ApplicationXtender Web Access .NET - Microsoft Internet Explorer

Address: http://xtender-web.nmsu.edu/wx/Main.aspx?AspxInterface=ResultSet&DSN=PBAN&AppName=B-F-GRNT&GRANT+CODE=GR0002773&Credentials=28%3aC62B2E6011474D1DDC1FA4F4741E800A8E4C81DDED7101ACC9...

Query Criteria for Application 'B-F-GRNT' Current Query: New Query

Show	Index Name	Search Value
<input checked="" type="checkbox"/>	GRANT CODE	<input type="text"/>
<input checked="" type="checkbox"/>	GRANT TITLE	<input type="text"/>
<input type="checkbox"/>	COAS CODE	*
<input checked="" type="checkbox"/>	DOCUMENT TYPE	*
<input type="checkbox"/>	RESPONSIBILITY CODE	<input type="text"/>
<input type="checkbox"/>	PROPOSAL CODE	<input type="text"/>
<input type="checkbox"/>	AGENCY ID	<input type="text"/>
<input type="checkbox"/>	AGENCY PIDM	<input type="text"/>
<input type="checkbox"/>	AGENCY LAST NAME	<input type="text"/>
<input type="checkbox"/>	PI ID	<input type="text"/>
<input type="checkbox"/>	PI PIDM	<input type="text"/>
<input checked="" type="checkbox"/>	PI LAST NAME	<input type="text"/>
<input checked="" type="checkbox"/>	PI FIRST NAME	<input type="text"/>
<input type="checkbox"/>	ROUTING STATUS	*
<input checked="" type="checkbox"/>	ACTIVITY DATE	<input type="text"/>
<input type="checkbox"/>	DOCUMENT RETENTION TRIGGER	<input type="text"/>
<input type="checkbox"/>	DOCUMENT RETENTION PERIOD	<input type="text"/>
<input checked="" type="checkbox"/>	FUND	<input type="text"/>
<input checked="" type="checkbox"/>	ESUBQ NO.	<input type="text"/>

**Query Options**  
 Show previous document revisions

**Save Options**  
Query Name:

Available To All Users



# BDMS Tips

- Incorrect filing will happen
- Send an email to [SPA\\_Sys\\_Admin@nmsu.edu](mailto:SPA_Sys_Admin@nmsu.edu)
  - With questions or
  - To report miss filed documents

# BDMS Exercises:

- 1. Accessing BDMS
- 2. Changing the default view
- 3. Queries – by doc type, by grant, by PI
- Tips:
  - Notations – PDF review and search
  - Number of documents for each grant, screen limit
  - Document page numbers
  - Viewing multiple doc types by grant

# ARGIS

New Mexico State University My Research - Windows Internet Explorer

https://argis.research.nmsu.edu/

File Edit View Favorites Tools Help

enhanced by Google Search hp Total Care hp Shop Mail AIM AIM News

Google Search Share Sidewiki Check Translate AutoFill Sign In

Favorites Suggested Sites Banner bookshelf 6 COGNOS P COGNOS U COGNOS Z Development INB Free Hotmail Information & Communicatio... NMSU Login - powered by S... NMSU UNO

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**NM STATE** NEW MEXICO STATE UNIVERSITY  
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**Welcome...**

NMSU ranks in the top 110 institutions in the country in terms of federal research expenditures. In addition to its status as a land-grant institution, NMSU also serves as the headquarters for the [NM Space Grant Consortium](#), the [NM Water Resources Research Institute](#), and [WERC](#), a statewide consortium for environmental education and technology development.

NMSU is the top U.S. Department of Defense contractor among Hispanic-serving universities. To facilitate interdisciplinary research across departments and colleges, NMSU has created 5 research clusters in its areas of strength.