

Indexing

Indexing links a document to Banner information.

After you have imported or scanned in a document, complete the Index panel on the right side of the screen.

The screenshot shows the 'B-F-DOCS > New Document' interface. On the left, a document page is displayed with a 'UNO' logo and several horizontal lines for text. On the right, an indexing panel is visible with the following fields:

- DOCUMENT ID * (text input, value: xxxxxxxx)
- BANNER DOC TYPE (dropdown menu)
- DOCUMENT TYPE * (dropdown menu, value: ELECTRONIC ROUTING)
- TRANSACTION DATE * (text input, value: 12-Nov-2019, with a calendar icon)
- VENDOR ID (text input)
- VENDOR NAME (text input)
- FIRST NAME (text input)
- PIDM (text input)
- ROUTING STATUS (dropdown menu)
- ACTIVITY DATE (text input, value: Timestamp)
- VPDI_CODE (text input)
- DISPOSITION DATE (text input, with a calendar icon)
- DOCUMENT NAME (text input)
- CREATE NAME (text input)

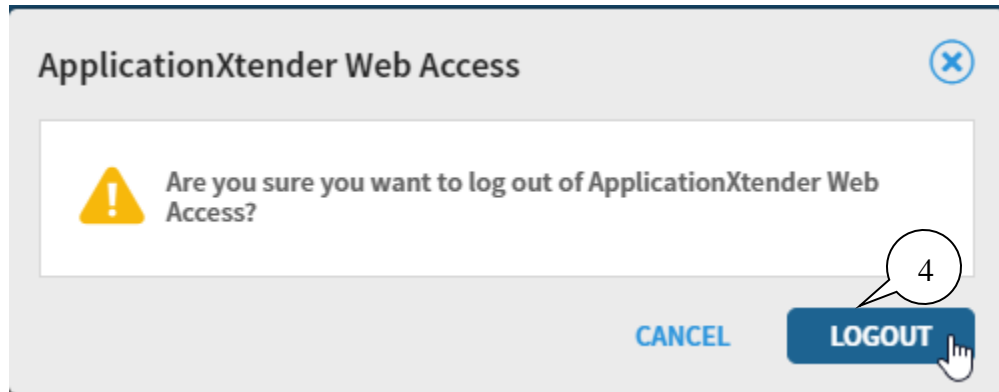
At the bottom of the indexing panel are 'CANCEL' and 'SAVE' buttons. A red bracket highlights the entire indexing panel. A callout '1' points to the 'DOCUMENT ID' field, and a callout '2' points to the 'SAVE' button.

1. Enter the index information in the value fields (*these will vary depending on the application*) and press **Tab**. Fields with a red star are required.
2. Click **Save**.

Note: The **Index Name** and **Field Value** information will vary depending on the application. Refer to the **Indexing Info Sheet** for the application you are using. See the RMR website (<https://rmr.nmsu.edu>) for more information.



3. When your scanning and indexing is completed, exit BDMS by clicking the **Logout** icon.



4. Click **Logout**.

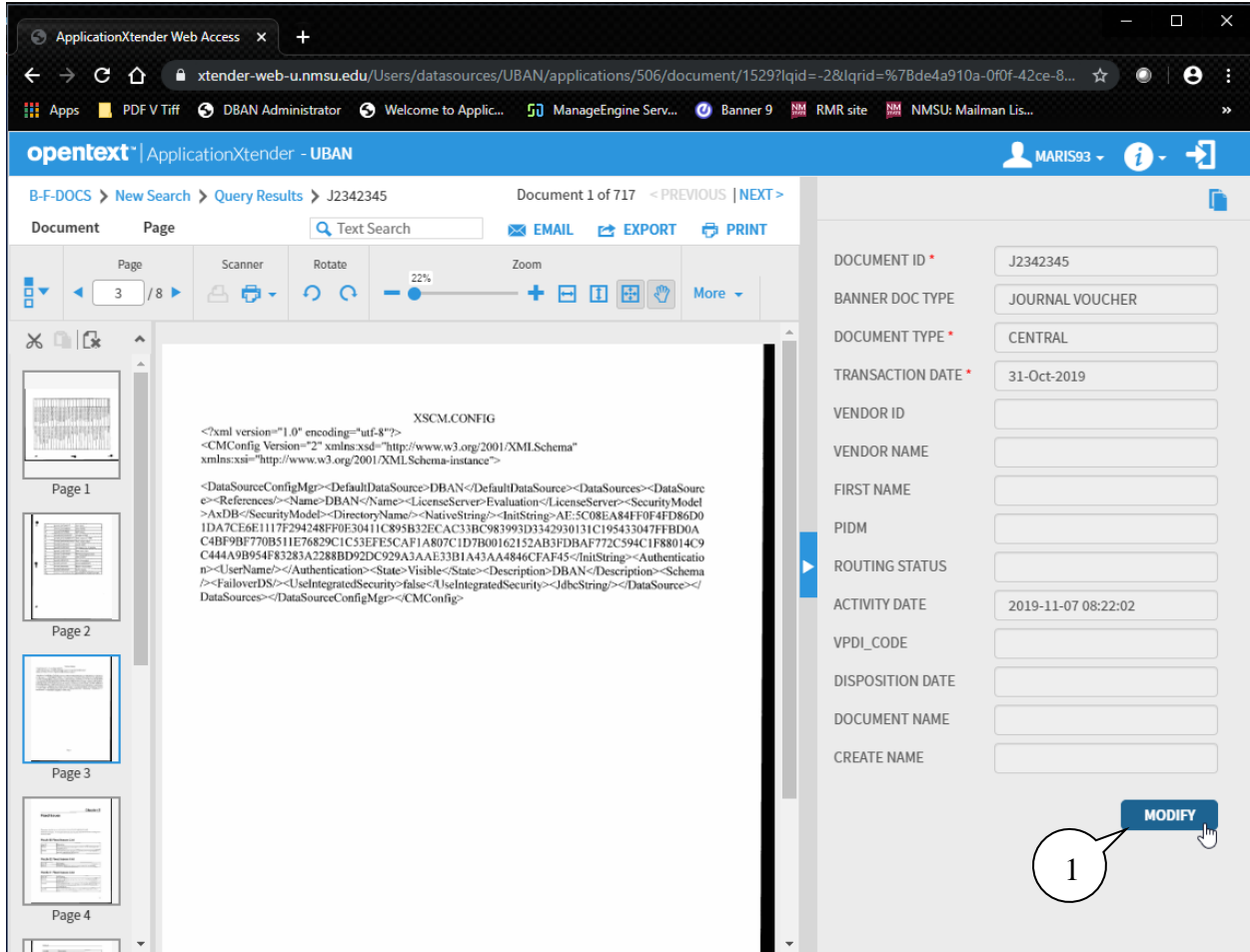
Note: Once imported documents are verified and indexed, delete the electronic files from where they were originally stored.



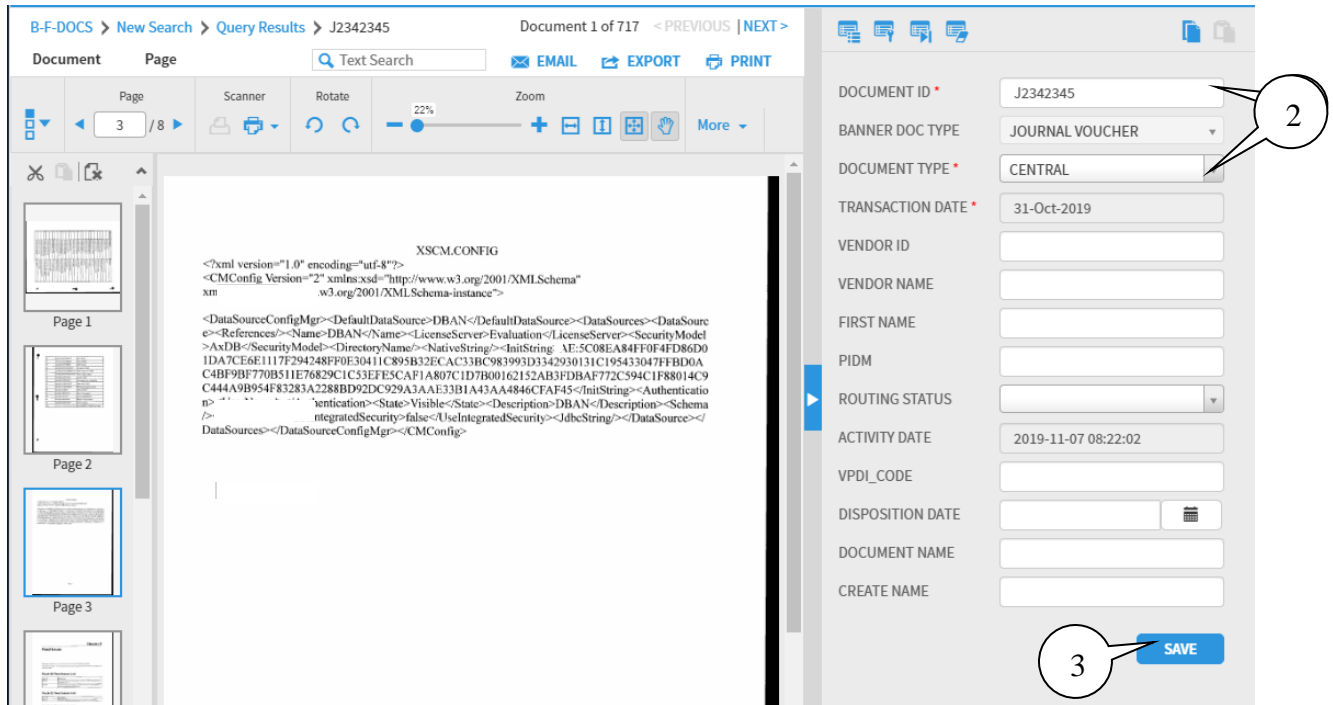
If you are interrupted and exit the document before indexing it, follow the instructions in [Appendix III: Index from a Batch](#).

Modify Index Fields

If a document is incorrectly indexed, the index information may be changed using the process outlined below.



1. When the document is open the index information will be displayed on the right side of the document. Click the **MODIFY** button.



2. In the application, only certain index fields may be changed. Make the necessary index field value changes.

Note: The **Index Name** and **Field Value** information will vary depending on the application. Refer to the **Indexing Info Sheet** for the application you are using. See the RMR website (<https://rmr.nmsu.edu>) for more information.

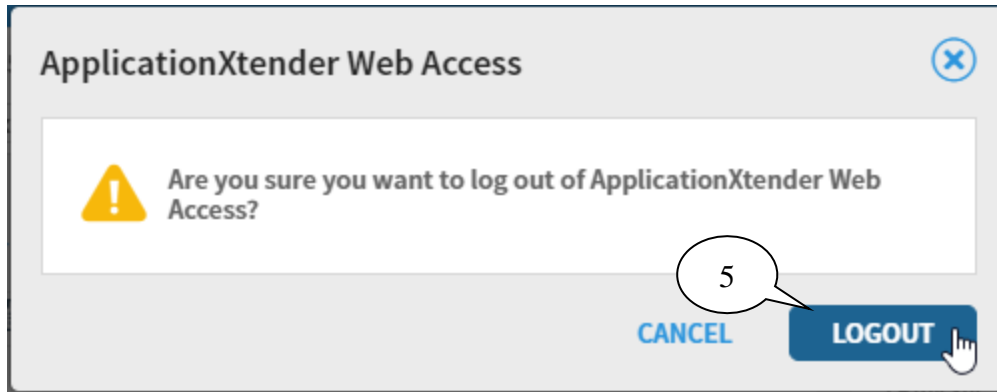
3. Click  to save your changes.

Note: A warning message **“The same index has been found in an existing document...”** will display if another document with the same index information exists. See Chapter 9: [Add Page\(s\) to an Existing Document - Fix a Unique Key Violation](#) or [Add Pages to an Existing Document in B-F-Docs](#)

The index field values are saved.

Note: All the pages in the document now pertain to the new index field values.

4. When finished, click the **Logout**  icon.



5. Click **Logout**.