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1. Introduction

The Office of Procurement and Contracts is in the process of making changes to the audit procedure. We are moving to a paperless system, where departments will be responsible for scanning their audit documentation into the banner system via BDMS (Banner Document Management System). The purpose of this document is to inform the departments of the change taking place and to provide detailed instructions on how to submit documents into BDMS. If you have processing questions, you may contact the Office of Procurement and Contracts. If you have technical questions, you will need to contact the ITS Help Desk.

The procedure for setting up Microsoft Internet Explorer for BDMS access is covered in the ITS document ‘Configure Internet Explorer for BDMS’.
2. Adding a PC Doc to BDMS

2.1 FGIDOCR form:

2.2 BDMS attach PC Doc document:

2.2.1 Initial BDMS screen:

(It may take a few moments for this page to render)
2.2.2 If not defaulted to the B-F-MSU-PROCUREMENT-CARD application, then select Application List icon (to be able to select B-F-MSU-PROCUREMENT-CARD Application):

![Application List Icon]

1) Application Name must be: B-F-MSU-PROCUREMENT-CARD
2) If Application needs to be changed, Select Application List

2.2.3 Select and right click on B-F-MSU-PROCUREMENT-CARD application. Select New Document in drop down list:

![Select New Document]

2.2.4 Confirm B-F-MSU-PROCUREMENT-CARD application:

![Application Confirmation]
2.3 BDMS Append Document:

![BDMS Append Document Image]

2.4 BDMS Select Document Menu:

The document to be selected should be located on local PC or network Drive.

![BDMS Select Document Menu Image]
2.5 BDMS Initial Append View:

After a document has been appended (submitted), the default is for BDMS to display the submitted document with the last page visible. Therefore, advance to the first page of the submitted document before beginning the indexing process.

2.6 BDMS Append - First Page:
2.7 BDMS Index Document:

(It may take a few moments for this page to render)

2.8 BDMS Index - Select Document Type:

Click in the Document Type field to display the list of document types. The available types are listed below. **Departments should only select “PC” when indexing.**

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC¹</td>
<td>A document containing procard receipts.</td>
</tr>
<tr>
<td>PC–RECON²</td>
<td>A submitted PC document currently being reconciled by Procard office.</td>
</tr>
<tr>
<td>PC–AUDIT²</td>
<td>A PC–RECON document reconciled and accepted by Procard office.</td>
</tr>
</tbody>
</table>

¹Note: If a document was inadvertently assigned PC-RECON or PC-AUDIT, the Procard office will have to reset the Document Type to PC.

²Note: Once a document has been assigned PC-RECON or PC-AUDIT, the document will only be viewable by the Procard office.
2.9 BDMS Index - PC DOC NUMBER:

Field Navigation: Use tab or enter key to move from one field to the next.
2.10 BDMS Index - Save:

2.11 BDMS Index - Attach All Pages:
2.12 BDMS Index - Attach All Proceed:

2.13 After Document has been Indexed, **EITHER** logout **OR** view document:

2.13.1 BDMS Index Done – Logout:

**OR:**

2.13.2 BDMS Index Done - View:
2.14 BDMS Show Indexes:

Select 'Document Index' icon to show index fields.

2.15 BDMS View Document/Modify Index:

If Index values need modifying, select 'Modify'.
2.16 BDMS Modify Index:

![Edit Index Value]

2.17 BDMS Save Modifications:

![Select 'Save']
2.18 BDMS Close:
3. Recalling an indexed document in BDMS

3.1 FGIDOCR form:

3.2 BDMS Query Results:
3.3 To View the document:

**EITHER:**

3.3.1 BDMS Open Doc Click:

OR:

3.3.2 BDMS Open Doc select:
4. Q&A

- What documents should a department include in this process?
  
  In the following order:
  - Printout of JV from FWGDTPC (portrait)
  - Signed copy of the statement
  - One copy of each invoice in the order of the statement
  - Any required form for purchase (food form, hotel form, membership dues form, property acquisition form, or Procurement Manager approval for purchases over $5,000)

  **This is all the paperwork that we want with the audit material**

- When scanning my receipts, what format should I use for my document?
  
  A PDF or TIFF format.

- When can a document be scanned and loaded into BDMS?
  
  After the document has been completed by the department and posted to the General Ledger.

- If I find an error in my scanned document, how do I correct it?
  
  Contact the Procard office. The document will be removed so a new copy can be loaded into BDMS.

- Why are some of my documents no longer visible?
  
  Once the Procard office begins an audit, the documents are no longer visible.