



## Guide for managing electronic documents in BDM and Navigate

There is a rapidly increasing volume of information that exists in digital form. Considerable opportunities are offered by digital technology to provide rapid and efficient access to information, but we also must take responsibility in how this information is handled and viewed by others.

**Banner Document Management (BDM)** access is by default given to advisors and their assigned students based on what is listed in Banner. If additional access is needed depending on the individuals' role at the institution this must be [requested](#). Information in BDM can be sensitive in nature, such as Academic Relief and Academic Appeal forms.

**Navigate Notes** can be seen by any staff user of Navigate, but not the student unless you have checked whether they can view the note or not. However, Navigate is not as granular with access like BDM, therefore, most professional advisors and others that have gone through training can access notes for all students. Therefore, since this information is more universal than BDM, information put into Navigate should only be information related to their academics.

### ***Forms that can be included in Navigate:***

- Absence Verification
- ATC Forms
- Course Substitutions
- Force Add/Late Drop
- Overhours request
- Request for Exam Time Change
- Resignation/Withdrawal