

Imagination
to
Realization



Introduction to Banner XtenderSolutions

Stephen J. Grim, CDIA+
SunGard Higher Education

Monday, April 3, 2006

8:30 – 9:30 am

Evaluation Code 294

Session Rules of Etiquette

- Please turn off your cell phone/pager
- If you must leave the session early, please do so as discreetly as possible
- Please avoid side conversation during the session

Thank you for your cooperation!

Introduction

Your Speaker: **Stephen J Grim, CDIA+**

- BXS Development Lead
- With SunGard Higher Ed. since 1998
- Have held positions in Client Services, System Administration, Development
- Associated with Banner XtenderSolutions since inception
- Experienced in challenges associated with investing in, and implementing, an EDMS

Topics of Discussion/Agenda Slide

- Present Overview of Enterprise Content Management
- Discuss the application of ECM concepts to Higher Education
- Introduce Banner XtenderSolutions
 - What is BXS ?
 - Key Areas of Integration
- Show BXS in Action!
- Q?A.

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ENTERPRISE CONTENT MANAGEMENT

SUNGARD SUMMIT 2006

April 2-5 Orlando, Florida



Enterprise Content Management

AIIM:

- The Enterprise Content Management Association
- (Association for Imaging and Information Management)

<http://www.aiim.org>

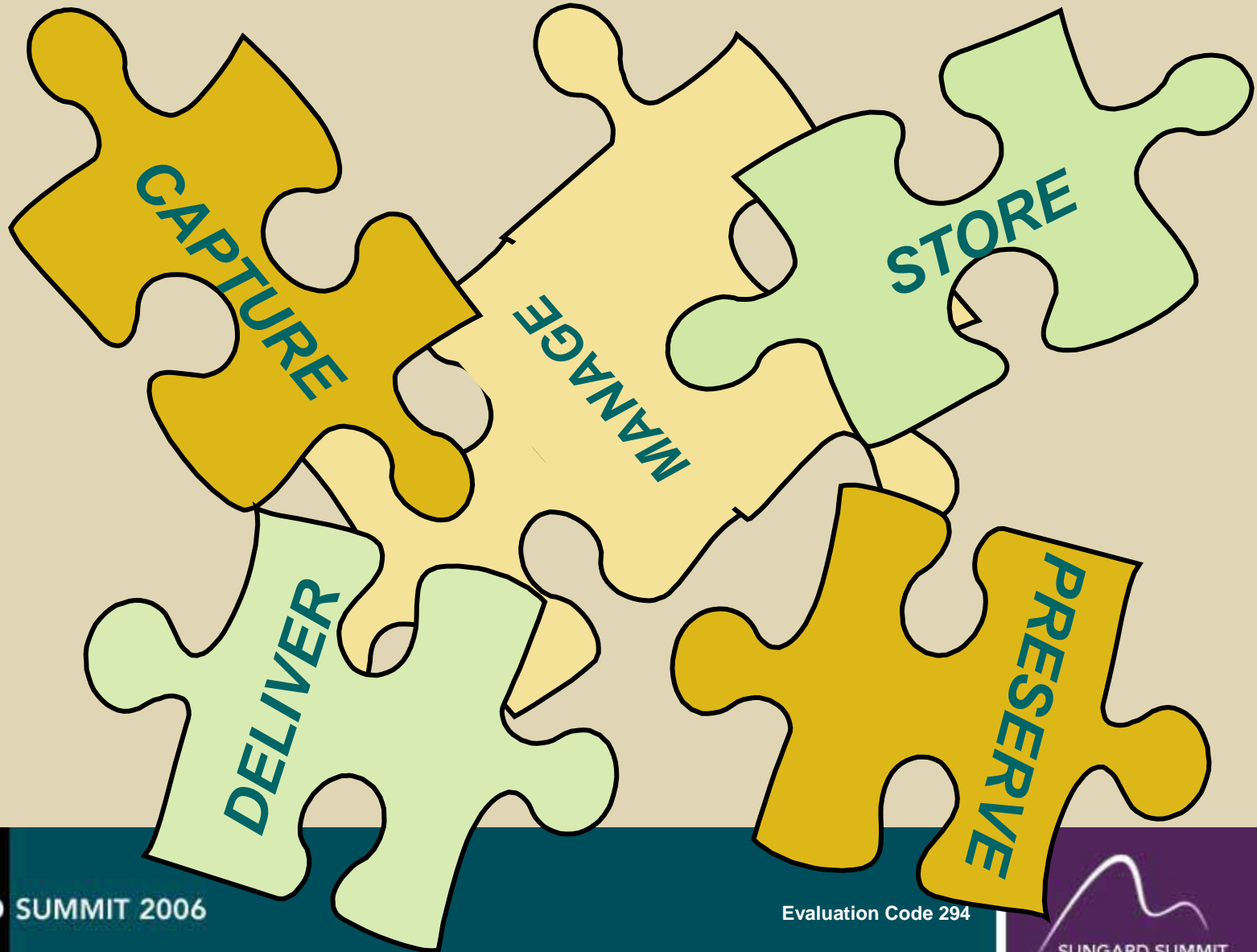
“...the technologies, tools, and methods used to ***capture***, ***manage***, ***store***, ***preserve***, and ***deliver*** content across an enterprise. “

What is “Content ?”

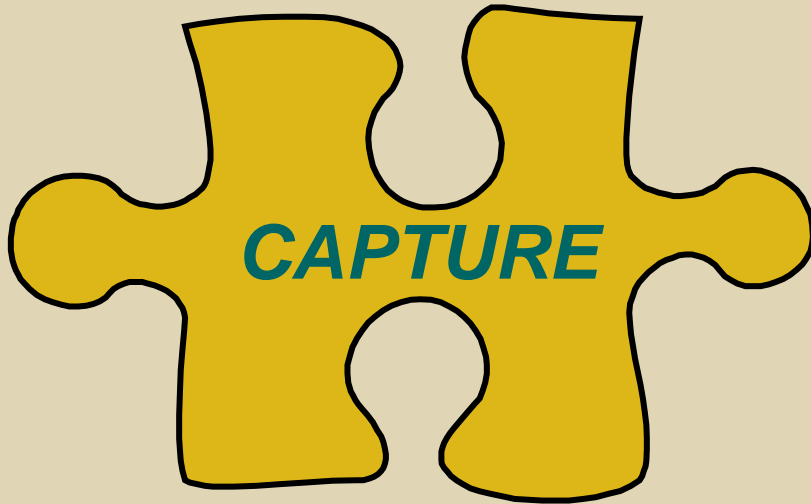
Type	Used in Higher Education
Scanned images	Application forms, Tax Forms, Invoices, Transcripts
Graphics	.BMP, JPEG, .GIF, TIFF, PCX
Electronic documents	WORD, Excel, PDF, etc.
Print Streams	Banner Reports
CAD Drawings	Facilities department, CAD class work
Video, Rich Media	Publicity videos, Student portfolios, Art department

THE ECM PUZZLE

<http://www.aiim.org/>



Assembling the Puzzle: CAPTURE



How does the information get into the system?

- Scanner
- File Import
- OCR / ICR
- Print Stream Capture

Assembling the Puzzle: STORAGE



Where does the information go ?

- RAID
- Optical Disk
- NAS / SAN
- TAPE

Assembling the Puzzle: *PRESERVE*



What is the Long Term Strategy ?

- Consider:
 - Local Records Management Policies
 - Federal, State, Industry Regulations
 - Available Technology for long term storage and retrieval

Assembling the Puzzle: *DELIVER*



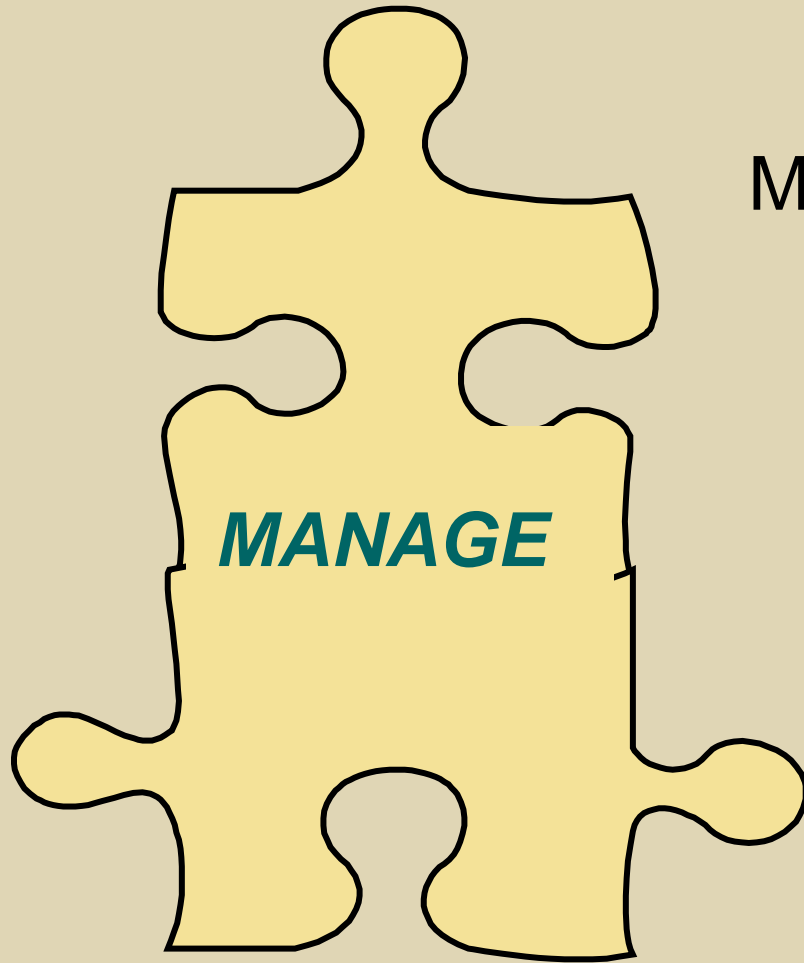
How is the information presented?

- Web Interface
- Client / Server
- Portable Collections

To Whom?

- Internal / External Security

Assembling the Puzzle: *MANAGE*

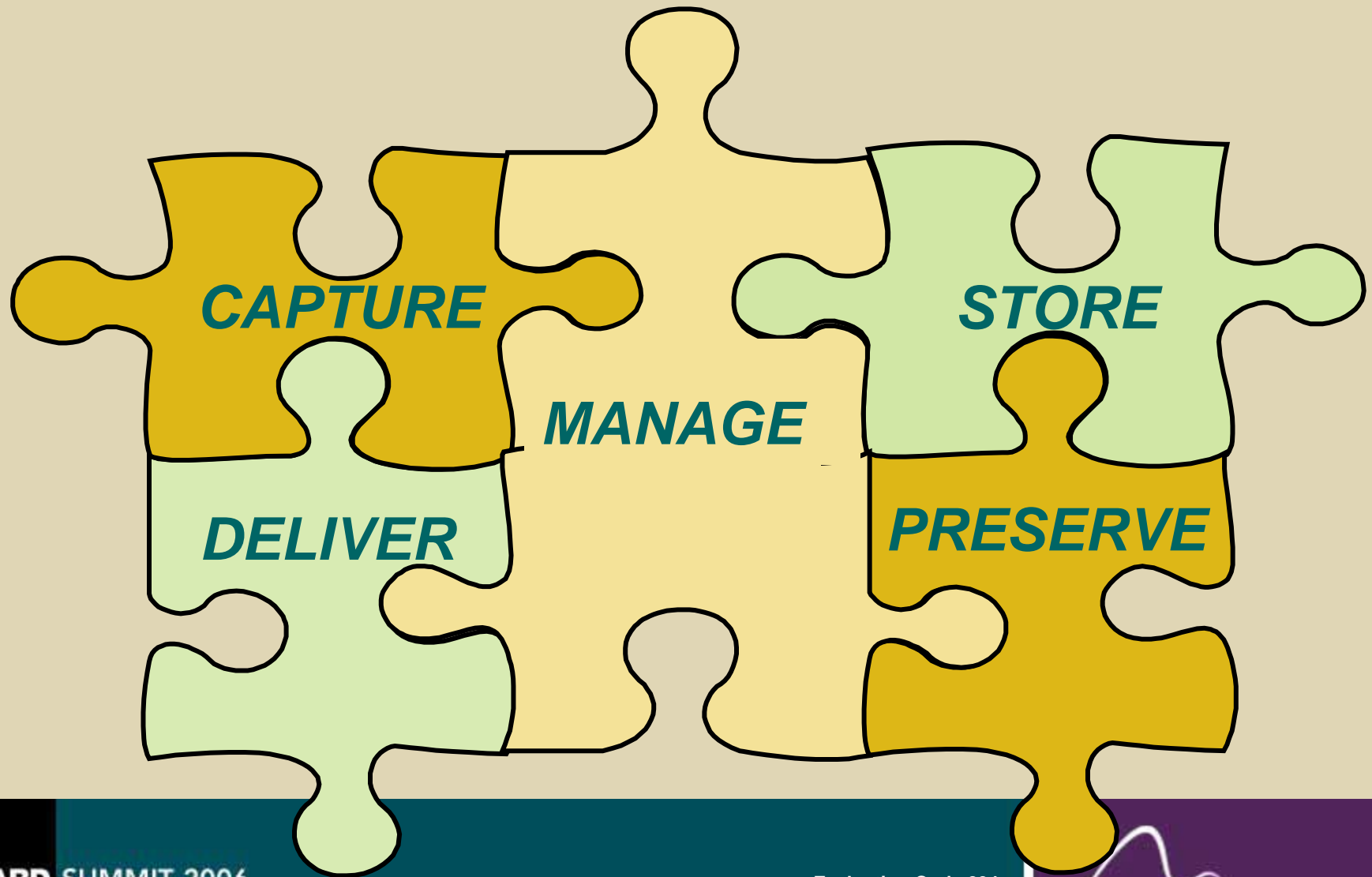


MAKE IT WORK TOGETHER

- Organize
- Collaborate
- Define Lifecycle

THE ECM PUZZLE

<http://www.aiim.org/>



Why Do I Need an Imaging System ?

- In many industries, an increased focus on long-term, electronic storage of information:
 - Desire to reduce the amount of paper
 - Ecological
 - Economical
 - Logistical
 - Legal reasons
 - Records Management & Retention policy
(DoD 5015.2; Sarbanes-Oxley, 2002)
 - Security/Accessibility
(HIPAA 1996; Patriot Act, 2001)
 - Part of broader Disaster Recovery strategy

Rewards

- Financial Impact
- Less paper, More Space
- Regulatory Compliance
- Long term storage of information on durable media
- ***On-demand access to information***
- **Get the Paper off your desk!**

Examples of ECM in Higher Education

- **ADMISSIONS:**

- Quick and Easy access to Student files speed up the decision process

- **FINANCIAL AID:**

- Manage docs that support the FA application, and award processes

- **ADVANCEMENT:**

- Maintain electronic records related to Gifts / Pledges, or personal donor information

- **FINANCE**

- Invoices, Purchase Orders, Checks

- **HUMAN RESOURCES**

- Electronic personnel records, Benefits information, Position Control

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Banner XtenderSolutions

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What Is Banner XtenderSolutions ?

- Baseline Banner module for Imaging
- Available since 2001
- Built on EMC/documentum ApplicationXtender platform
- Suite of Imaging and Document Management tools
 - ApplicationXtender (AX)
 - DiskXtender (DX)
 - WebXtender (WX)
 - ERMXtender (ERMx)
 - ScanXtender (SX)
 - ReportXtender (RX)
- Manages Banner and Non-Banner content
- Current Releases: BXS 7.0.1.1 and BXS 6.3

Overview of Key Functionality

- Store scanned images and electronic files of any format
- Use Banner data to create meaningful indexes
- Accessibility:
 - Accessible through Luminis channel or tab
 - Accessible from Banner via toolbar or menu
 - Accessible stand-alone through browser or desktop client
- Secure access to sensitive or confidential information

Demonstration of BXS Features

Focus On...



- EASY ACCESSIBILITY
 - Icon Access
 - Single Sign On
- INTEGRATION
 - Screen Integration
 - Data Integration
 - Event Integration

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Banner XtenderSolutions:

LIVE DEMO: SUMMIT 06 Environment

Points of Integration

- Luminis Integration:
 - ApplicationXtender system may be queried directly from Luminis channels or tabbed interface
- Banner Screen Integration :
 - AX and AX Web Access may be called directly from a Banner session
 - Two XS Icons embedded in the Banner Toolbar
 - “Tools Menu” option
- Data Integration
 - Quickly index a file or scanned image to Banner data
- Event Integration
 - Student and Financial Aid requirements updated by XS activity
 - Banner Security enforced during retrieval of document

Security and Banner XtenderSolutions

- SSO between Luminis or Banner uses encryption and expiration limits
- WebXtender Supports SSL connections
- Security of storage space may be managed through DX
- AX Users may be organized into Groups
 - Users & Groups may be assigned a range of privileges to one or more applications
 - Document Level Security: Used to enforce access control based on Index Value(s)
- Banner Security enforced within the XtenderSolutions products (Human Resources and Finance)

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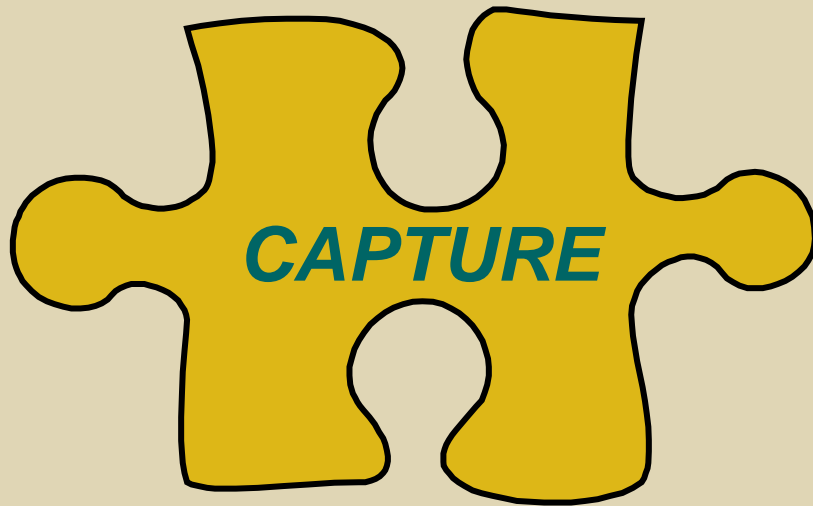
Completing the ECM Puzzle

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CAPTURE



Reports Manager for AX (fka
ERM Xtender)

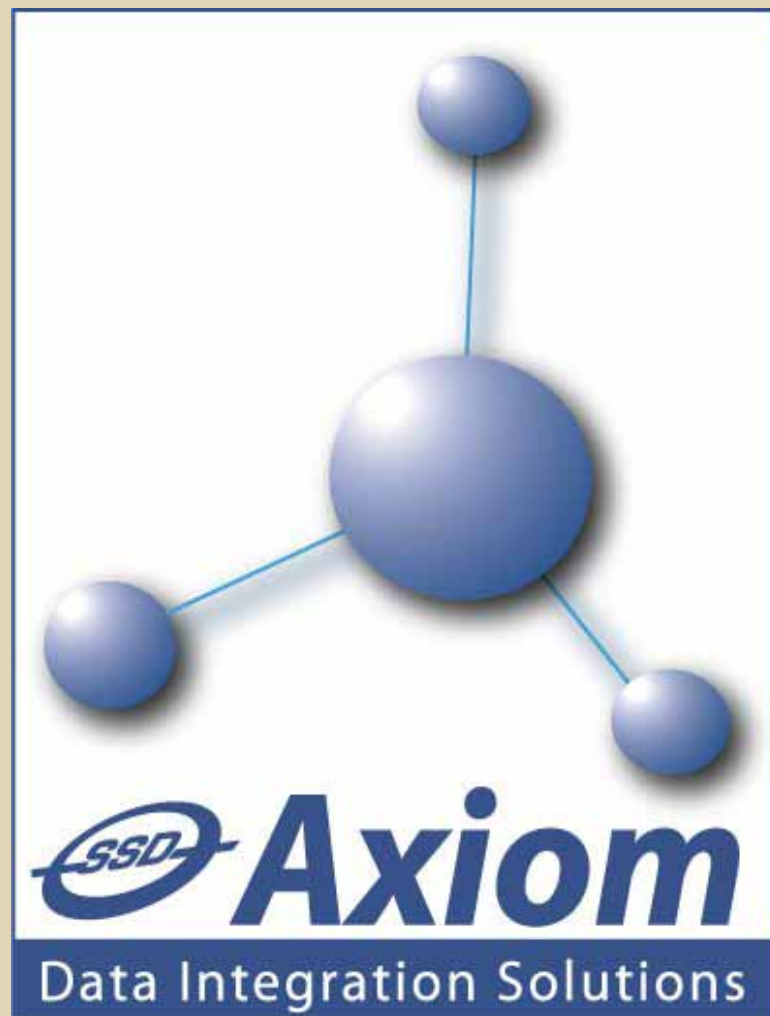
AXIOM: SSD partnership

ERMxtender

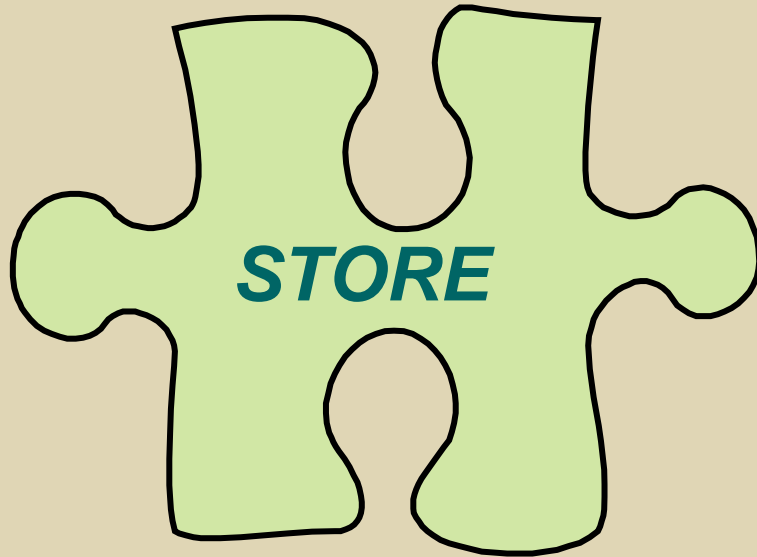
- Electronic Report Management
- Automated capture of PCL printstream, ASCII or PDF
- Render as images visible within AX & WX
- Forms-overlay capability enables enhanced presentation for text-based reports
- Example: Financial Aid (ISIR) and Banner Transcripts

Software Services of Delaware (SSD)

- AXIOM
- Automated, real-time processing of information from:
 - Paper Forms
 - E-forms
 - Tape Loads for PLUS and Banner
- www.ssdell.com/axiom



STORAGE



- DiskXtender
- MediaStore

DiskXtender

- Hierarchical Storage Management product
- Move images from server to secondary media:
 - RAID
 - WORM
 - Tape
 - SAN / NAS
- Rules—system used to manage long term storage

PRESERVE



ReportXtender

Records Manager for AX

ReportXtender

- Create portable document collections on CD
 - Self-Contained system
 - Query-able collections of Images
 - Indexes
- Ideal for staff on the road
- Use as offline storage strategy

RECORDS MANAGER for AX

- New Module Targeted for 2005
- Allows for scheduled lockdown of documents according to Retention Schedule
 - Images visible within AX & WX
- Also supports DoD 5015.2 Records Management specification
 - Images moved off to separate database
- Please see Documentum booth for more information

DELIVERY

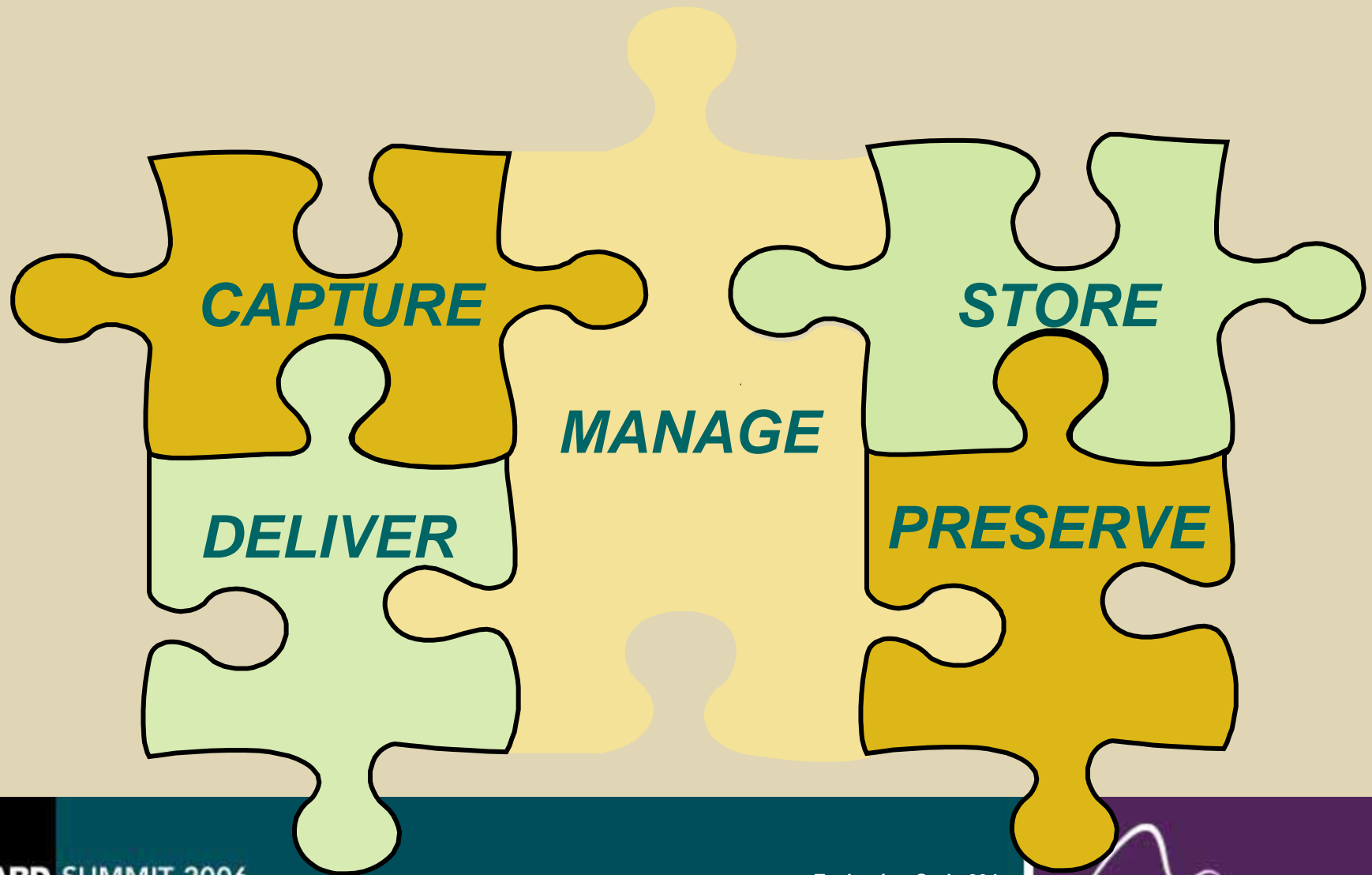


ApplicationXtender

Web Access Module for AX

THE ECM PUZZLE

<http://www.aiim.org/>



XtenderSolutions and the ECM Puzzle

	Capture	Store	Preserve	Deliver	Manage
ApplicationXtender	✓			✓	✓
WebXtender	✓			✓	
ERMXtender	✓				
SSD Axiom	✓				
ReportXtender		✓	✓	✓	
Records Manager		✓	✓		✓
DiskXtender		✓	✓		✓

TELL ME MORE !!

- Numerous Sessions in all Tracks
- Hands - On Training
(pre-registration required)
- Action Line / Lab
- EMC/documentum Booth
- SSD Booth
- SunGard Booth

DON'T MISS !

***“EMERGING TRENDS IN RECORDS
MANAGEMENT”***

Jesse Wilkins

CDIA+, EDP, LIT, ICP

IMERGE Consulting

Monday, April 3 2:00 PM

Americas Seminar Room (*Dolphin*)

Questions & Answers

Questions & Answers

Thank You!

Stephen Grim

Stephen.Grim@sungardhe.com

Please complete the on-line Evaluation Form
Evaluation Code 294

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Quotes from Clients Using XtenderSolutions

“Banner XtenderSolutions enables us to make information available to everyone who needs it, simultaneously, right from their desktop. We have cut down the cycle time for files to be completed and accessible for review from weeks to days.”

Jeff Hammer, Director of Admissions, Clayton College & State University

“Banner XtenderSolutions is letting us do awards faster. In Financial Aid, that’s the bottom line. And we’re providing much better service than ever before.”

Dick Savage, Director of Financial Aid, Eastern Connecticut State University