CHABOT-LAS POSITAS COMMUNITY COLLEGE DISTRICT

October 19, 2010

Agenda Item: 5.6

Subject: Approval of Purchase of the Banner Document Management System (BDMS) by Sungard Higher Education

Background: The District Strategic Plan for Information Technology Services includes an initiative to select and implement a Document Imaging System to migrate to a paperless environment replacing manual files with electronic media where appropriate. This type of system will reduce facility space for file storage and archives and will automate the manual processes in all the business areas of the Colleges and District. Some of the areas that would benefit most from the Document Imaging software are those that handle transcripts, admissions materials and checklist items, financial aid documents and tracking, finance invoices, purchase orders, human resource applications, and employee files. However, the software requirement is not limited to the Banner system functions only, but needs to have the capability to be extended to any area of the Colleges or District where storage of digital media is required.

A project team of users from Admissions & Records, Financial Aid, VPs Student Services, Directors, and Deans from both colleges and District ITS participated in several demonstrations of the Banner Document Management System (BDMS) to evaluate the full functionality of the Sungard product and the automatic integration with all the modules of the current Banner System. The team unanimously selected the BDMS solution because it satisfied all the user requirements for automation, it is all one integrated solution unlike their current ATIFiler System, and all functions are performed within the existing Banner screens which maximizes efficiency and reduces the learning curve. In addition to the BDMS extensive functionality, the system will replace the outdated and limited ATIFiler System that is utilized today by Admissions & Records at both colleges for the scanning of the transcripts received from other institutions. This BDMS system is not a standalone system like ATIFiler, but the BDMS module is an integral part of the Banner system and contains automatic links within the Banner System to view or modify the documents directly. BDMS has automatic links established within Banner for A&R, Financial Aid, Finance, Purchasing, Human Resources, and Payroll. However, the Banner Document Management Suite can also be used to store, secure, and manage external documents or objects that are not related to SunGard's Banner System, so any system applies.

Many of the other California Community Colleges already have BDMS implemented at their site for some time with excellent productivity results, which include San Mateo, Antelope Valley, Imperial Valley, Cuesta, and College of the Sequoias. Another group of California Community Colleges are in the process of implementing BDMS, which include Coast, Marin, Foothill DeAnza, Rio Hondo, and Solano. Sungard also has experience in converting the ATIFiler system data to the new Sungard BDMS system. The California Community Colleges that have

converted from ATIFiler to Sungard BDMS include Citrus College and Gavilan. All these CCD's selected the Banner Document Management System due to system features, the built-in full integration with Banner, and the ability to utilize the software in connection with other systems besides Banner.

Sungard's Banner Document Management System (BDMS) has extensive functionality both for Banner data as well as other external systems, as is noted from the comprehensive list of features available. Capabilities of BDMS include automated scanning, filing and processing of documents, management of scanned images as well as items like Word documents and emails, enterprise workflow launching, output capture of bills, letters, and reports, portable offline document collections, and storage management for both Banner and non-Banner users. BDMS is able to capture both paper-based information and system-generated files such as scanned and faxed documents, word-processed documents, spreadsheets, email, bills, reports, and other output. Users can scan or import documents, index documents, modify indexes, process and update information with tools for annotations, redaction, check-in/check-out documents, add pages, delete pages or documents, maintain version control, run queries, view documents, and run reports management to extract external documents.

<u>Recommended Action</u>: That the Board of Trustees approves the proposed purchase of the Banner Document Management System (BDMS) for a district-wide enterprise license totaling $266,085, which includes software, annual software maintenance, implementation services, conversion services for ATIFiler System, and training. It is further recommended that the Board authorizes the Vice Chancellor, Business Services, to execute the agreement and any future augmentations or amendments to the agreement on behalf of the District.

Funding Source: Measure B Bond Funds

Submitted: Lorenzo Legaspi/Date   Approved: Joel L. Kinnamon/Date

_____ APPROVED   _____ DISAPPROVED   _____ TABLED