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Banner Document Management at The College at Brockport

Pat Maxwell

The College at Brockport, pmaxwell@brockport.edu

Patty Pfister

The College at Brockport, ppfister@brockport.edu

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Banner Document Management at The College at Brockport

Presented by members of
The College at Brockport
Document Imaging Steering Committee

November 5, 2013

Banner Document Management (BDM)

- Uses the AppXtender module to scan or import documents which are then indexed to Banner records.
- Banner forms retrieve imaged documents based on context rules, index values and defined user permissions.
- Provides Self-Service Banner integration.



We only use BDM and AppXtender (Web access)

This allowed us to:

- Enhance popsels to track document “movement”
- Create our own automated processes
- Devise a method to batch delete images based on State University of New York retention guidelines



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Agenda

1. Introductory Video
2. “Our” interface to imaged documents
3. The Imaging Project
4. Key BDM add-ons and customizations
5. Lessons learned and Next Steps
6. Q&A



We won the Ellucian Inspire Award!



<http://www.youtube.com/watch?v=Ao1QhTN2XBo>



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Document Imaging Steering Committee



Who we are

DISC (Document Imaging Steering Committee)

Members here today:

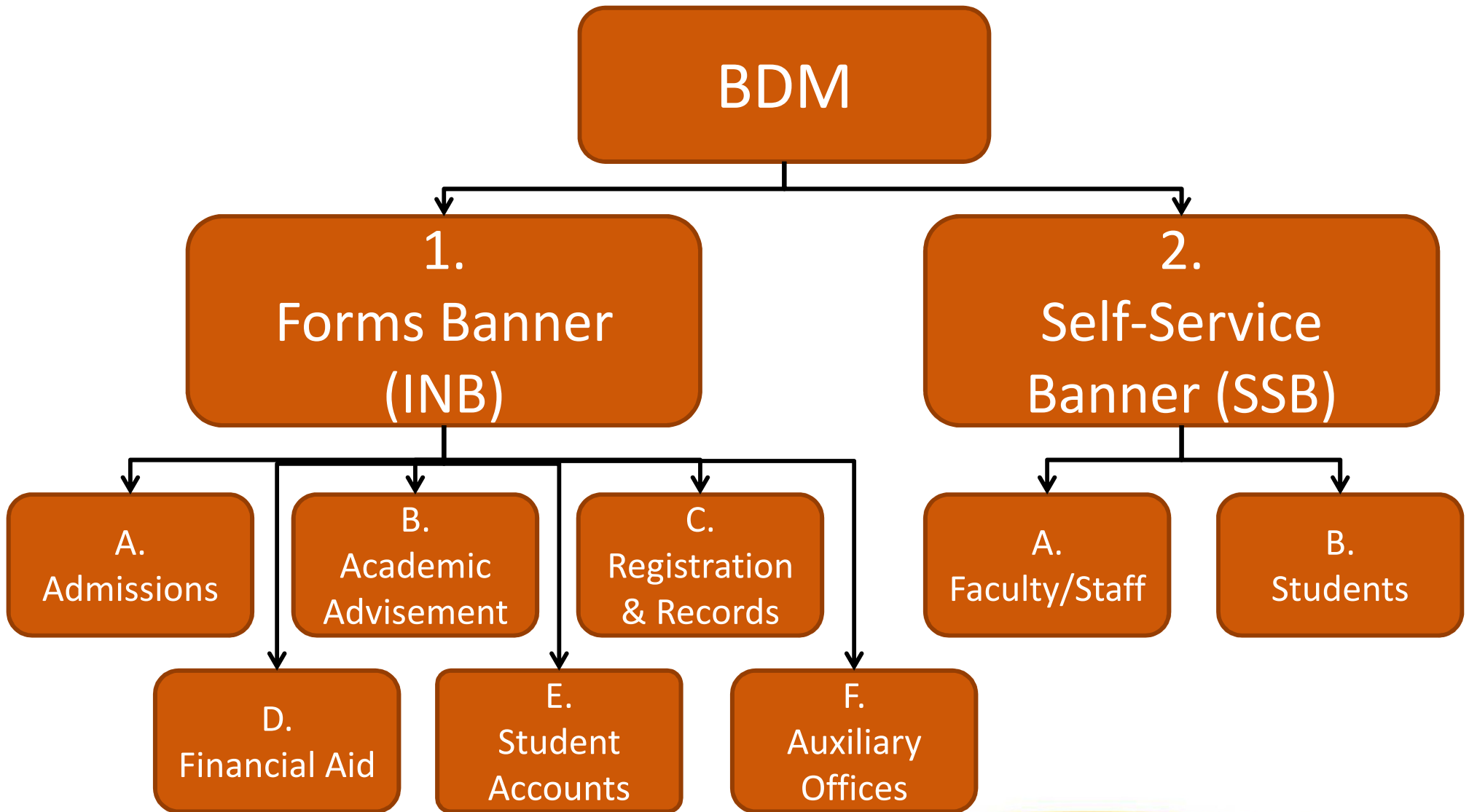
- Pat Maxwell – LITS Imaging Project Manager
- Patty Pfister – LITS Senior Software Designer
- Deb Birkins – UG Academic Advisement



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How we access the images



1. Accessing Indexed Imaged Documents from Forms Banner (INB)



Oracle Fusion Middleware Forms Services: Open > SGASTDN

File Edit Options Block Item Record Query Tools Help

General Student Form SGASTDN 8.5.6 (PROD)

ID: Student Summary Term: View Current/Active Curricula

Learner Curricula Study Path Activities Veteran Comments Academic and Graduation Status, Dual Degree Miscellaneous

General Learner



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2A. Viewing of Imaged Documents - SSB

The screenshot shows a web browser window with the following elements:

- Browser menu: File, Edit, View, Favorites, Tools, Help
- Address bar: Faculty & Advisors Menu
- Navigation tabs: Personal Information, Faculty Services (selected), Alumni and Friends, Student Services, Career Services, New WebTailor Administration, Library Ordering Module
- Links: RETURN TO MENU, SITE MAP, HELP, EXIT
- Section: Faculty Services
- Section: Applicant Information
 - [View a List of Your GR Department's Applicants](#)
- Section: Advisement Information
 - [View a List of Your Advisees \(With Links\)](#)
 - [Display Departmental Majors](#)
 - [Select a Term](#)
 - [Select a student ID](#)
Select an ID to use in other pages. You may select from a list of your students, or search...
 - [View Student Information](#)
 - [View Student Address & Phones](#)
 - [View Student E-mail Address](#)
 - [View Student FERPA Designations](#)
 - [View Student Schedule](#)
 - [View the Mid Term Grades of a Student](#)
View an individual student's Mid Term grades by the selected term.
 - [View Student Advisement Key No.](#)
 - [View Student Registration History](#)
 - [View Student Holds](#)
 - [View Student Academic Transcript](#)
 - [View Student DARS Report](#)
 - [View Student Imaged Documents * NEW *](#)
Imaged Documents are available for students who started Spring 2012 and later.

A callout box on the right side of the page contains the following text:


Self-Service Banner:

- GR Faculty Reviewers
- Faculty Advisors
- Non-advisors/All Faculty

Three green arrows point from the callout box to the links: 'View a List of Your GR Department's Applicants', 'View Student Imaged Documents * NEW *', and 'View the Mid Term Grades of a Student'.



2A. GR Faculty Reviewers








TEST - CAMPUS INFORMATION SYSTEM

Personal Information
Faculty Services
Alumni and Friends
Student Services
Career Services
New WebTailor Administration
Library Ordering Module


[RETURN TO MENU](#)
[SITE MAP](#)
[HELP](#)

Applicant List of Social Work(Adv Standing), MSW for Summer 2013 Complete (ready for review)

Name	ID	Last Activity	Summary	Other	Previous Coursework Section	Personal Statement Section	Social Issue Section	Test Scores	Previous College	Imaged Documents	Comments	Recommendation	Condition (s) of Admission
Bain, L	8005 [redacted] 	15-JAN-13	View	View	View	View	View	None	View	Display	Enter 3 Dept	Enter 2 Dept	
Beriau, C E.	8005 [redacted] 	31-JAN-13	View	View	View	View	View	None	View	Display	Enter 0 Dept	Enter 0 Dept	
Bowick, C	8005 [redacted] 	18-JAN-13	View	View	View	View	View	None	View	Display	Enter 1 Dept	Enter 1 Dept	
Chapman, K	8004 [redacted] 	23-JAN-13	View	View	View	View	View	None	View	Display	Enter 2 Dept	Enter 1 Dept	
Christie, S P.	8003 [redacted] 	16-JAN-13	View	View	View	View	View	None	View	Display	Enter 1 Dept	Need Transcript(s)	



2A. Faculty Advisors



TEST - CAMPUS INFORMATION SYSTEM

[Personal Information](#) **[Faculty Services](#)** [Alumni and Friends](#) [Career Services](#) [Library Ordering Module](#)


[RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)


Advisee Listing

Summer 2014
Oct 26, 2013 04:38 pm

*** Imaged Documents and Condition(s) of Admission are available for students with entry term of Spring 2012 and greater.

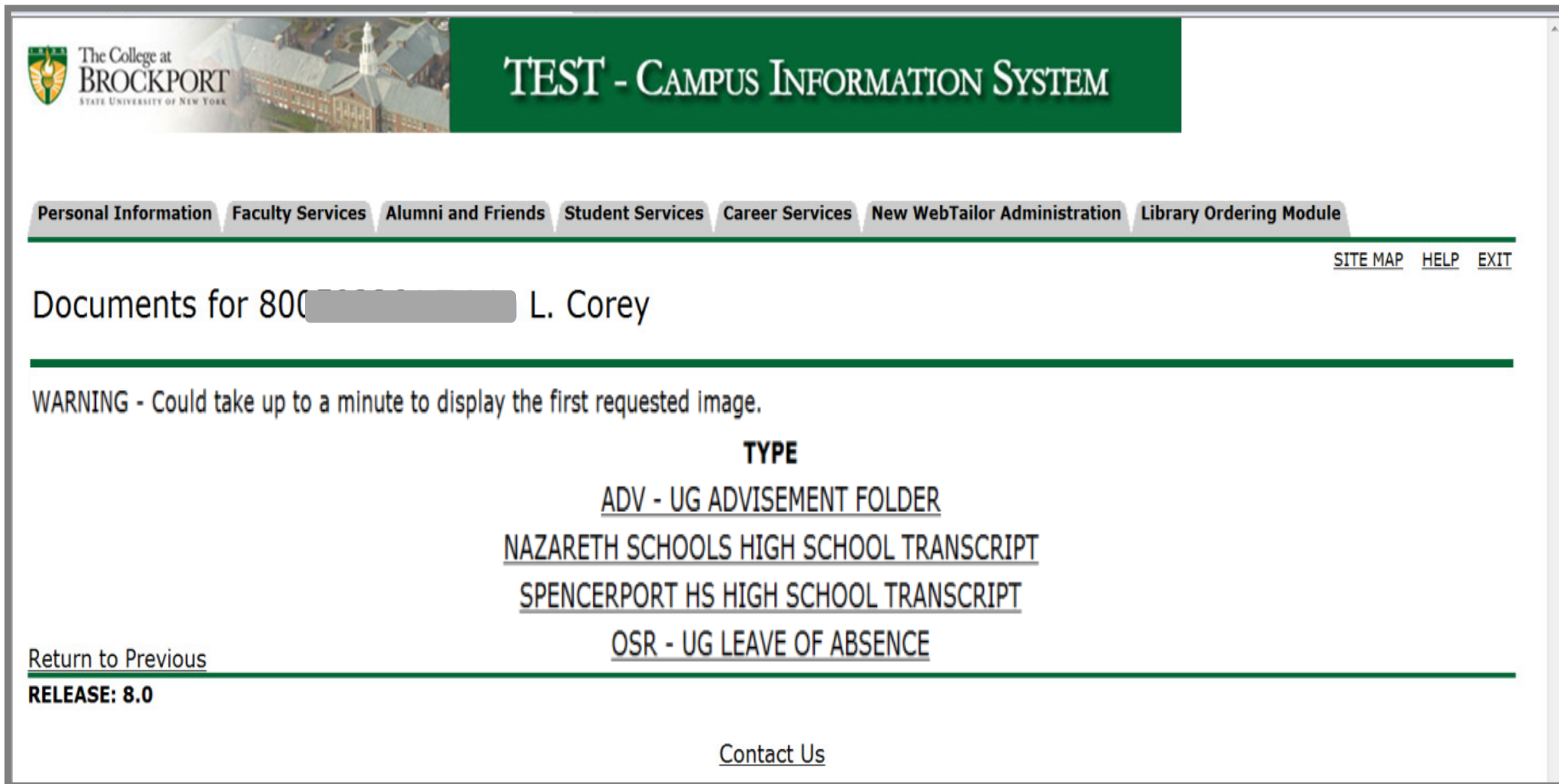
Advisee Listing

Student Name	ID and Campus Email	Advisor Type	Advisement Key Number	Student Information	Holds	Last Term Reg	Brockport Transcript	Degree Audit	Imaged Documents	Condition(s) of Admissions	Comments
Am Amanda J.	800 [redacted] 	General		View	View	201309	View	DARS	Display	Unavailable	Enter 0 Public

[Email your advisees](#) 



2A. Faculty/Staff



The screenshot shows the 'TEST - CAMPUS INFORMATION SYSTEM' interface. At the top left is the logo for The College at Brockport, State University of New York. The main title 'TEST - CAMPUS INFORMATION SYSTEM' is displayed in a green banner. Below this is a navigation menu with tabs for 'Personal Information', 'Faculty Services', 'Alumni and Friends', 'Student Services', 'Career Services', 'New WebTailor Administration', and 'Library Ordering Module'. On the right side, there are links for 'SITE MAP', 'HELP', and 'EXIT'. The main content area shows 'Documents for 800 [redacted] L. Corey'. A warning message states: 'WARNING - Could take up to a minute to display the first requested image.' Below this, a list of document types is shown: 'TYPE', 'ADV - UG ADVISEMENT FOLDER', 'NAZARETH SCHOOLS HIGH SCHOOL TRANSCRIPT', 'SPENCERPORT HS HIGH SCHOOL TRANSCRIPT', and 'OSR - UG LEAVE OF ABSENCE'. At the bottom left, there is a 'Return to Previous' link and the text 'RELEASE: 8.0'. At the bottom center, there is a 'Contact Us' link.

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TEST - CAMPUS INFORMATION SYSTEM

[Personal Information](#) [Faculty Services](#) [Alumni and Friends](#) [Student Services](#) [Career Services](#) [New WebTailor Administration](#) [Library Ordering Module](#)

[SITE MAP](#) [HELP](#) [EXIT](#)

Documents for 800 [redacted] L. Corey

WARNING - Could take up to a minute to display the first requested image.

TYPE

ADV - UG ADVISEMENT FOLDER

NAZARETH SCHOOLS HIGH SCHOOL TRANSCRIPT

SPENCERPORT HS HIGH SCHOOL TRANSCRIPT

OSR - UG LEAVE OF ABSENCE

[Return to Previous](#)

RELEASE: 8.0

[Contact Us](#)



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2B. Student Services



TEST - CAMPUS INFORMATION SYSTEM

[Personal Information](#) [Student Services](#) [Financial Aid](#) [Career Services](#) [Library Ordering Module](#)

[RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Student Services

Action Items Review * NEW *

Review Mandatory Action Items - WARNING - Could take up to a minute to display.

Admissions

Review your application status. INCOMING FRESHMEN - Submit your Course Preferences Request and reserve your spot for Freshmen Orientation. INCOMING TRANSFERS - Reserve your spot for SOAR (Student Orientation Advisement and Registration). PROSPECTIVE GRADUATE STUDENTS - Apply for a graduate program.

Bmail Communications

Review descriptions of the College's Official Bmail Communications.

Insurance Waiver Deadline

Information on waiving mandatory health insurance by the deadline. Students who fail to waive by the deadline will be responsible for full payment.

Registration

Check your registration status, register, add and drop courses, enter a Permission Key Number, affirm your enrollment, get your schedule, order your books, request an enrollment verification.

SEVIS Menu

This form is for F-1 visa students only. Review your SEVIS information, employee information and local address.

Student Accounts * NEW *

View and pay your bill, see your most recent account activity, enroll in a payment plan, sign up for direct deposit refunds, authorize parents and others to receive an electronic copy of your bill and remit payment on your behalf, access account information for tax reporting purposes and learn more about the annual health insurance plan.

Student Records

Check for holds, view imaged documents, view your grades and Brockport transcript, review charges, tax info and payments, get a DARS audit, apply for graduation and check health services items.

RELEASE: 8.5.1



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2B. Student Records



TEST - CAMPUS INFORMATION SYSTEM

[Personal Information](#) [Student Services](#) [Financial Aid](#) [Career Services](#) [Library Ordering Module](#)

[RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Student Records

[View Holds](#)

Click here to view any holds on your records which may prevent registration. Use the "contact" link to the Faculty and Staff Directory and check with the holding office regarding clearance.

[View Imaged Documents](#) * NEW *

Imaged Documents are available if you started Spring 2012 and later.

[DARS Audit](#)

Click here to view and print your DARS audit.

[Academic Transcript](#)

Click here to view and print your Brockport transcript.

[Midterm Grades](#)

Click here to view your mid-term grades for the selected term.

[Final Grades](#)

Click here to view your final grades for the selected term.

[View Student Information](#)

Click here to view information from the general student record including entry term, level, class, advisor, major and degree type.

[Immunization Records](#)

[Meningitis Check](#)

[Apply for Graduation](#) * NEW *

Apply for graduation if you expect to complete all requirements for your degree by the end of this semester or next semester.

[View Graduation Application](#) * NEW *

View details regarding your graduation application.

RELEASE: 8.5.1



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2B. Students

[Personal Information](#) [Faculty Services](#) [Alumni and Friends](#) [Career Services](#) [Library Ordering Module](#)

[SITE MAP](#) [HELP](#) [EXIT](#)

Documents for 800 [REDACTED] T [REDACTED] Corey

WARNING - Could take up to a minute to display the first requested image. The recommended browser for viewing images is Internet Explorer (IE). If using a non-IE browser, you may receive an additional "Open file" pop-up.

If you have questions about these documents, please contact the appropriate office. Click the **HELP** link above to view the legend.

TYPE

[ADV - MAJOR DECLARATIONS](#)

[ADV - UG ADVISEMENT FOLDER](#)

[NAZARETH SCHOOLS HIGH SCHOOL TRANSCRIPT](#)

[SPENCERPORT HS HIGH SCHOOL TRANSCRIPT](#)

[Return to Previous](#)

RELEASE: 8.0

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TEST - CAMPUS INFORMATION SYSTEM

[Personal Information](#) [Student Services](#) [Financial Aid](#) [Career Services](#) [Library Ordering Module](#)

[SITE MAP](#) [HELP](#) [EXIT](#)

Documents for 800 [REDACTED] T [REDACTED] Corey

WARNING - Could take up to a minute to display the first requested image. The recommended browser for viewing images is Internet Explorer (IE). If using a non-IE browser, you may receive an additional "Open file" pop-up.

If you have questions about these documents, please contact the appropriate office. Click the **HELP** link above to view the legend.

TYPE

[ADV - UG ADVISEMENT FOLDER](#)

[FERPA - Consent to Release Student Information](#)

[NAZARETH SCHOOLS HIGH SCHOOL TRANSCRIPT](#)

[SPENCERPORT HS HIGH SCHOOL TRANSCRIPT](#)

[Return to Previous](#)

RELEASE: 8.0

[Contact Us](#)

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2. Self-Service Banner (No Images)

[Personal Information](#)

[Faculty Services](#)

[Alumni and Friends](#)

[Career Services](#)

[Library Ordering Module](#)

[SITE MAP](#) [HELP](#) [EXIT](#)

View Student Imaged Documents

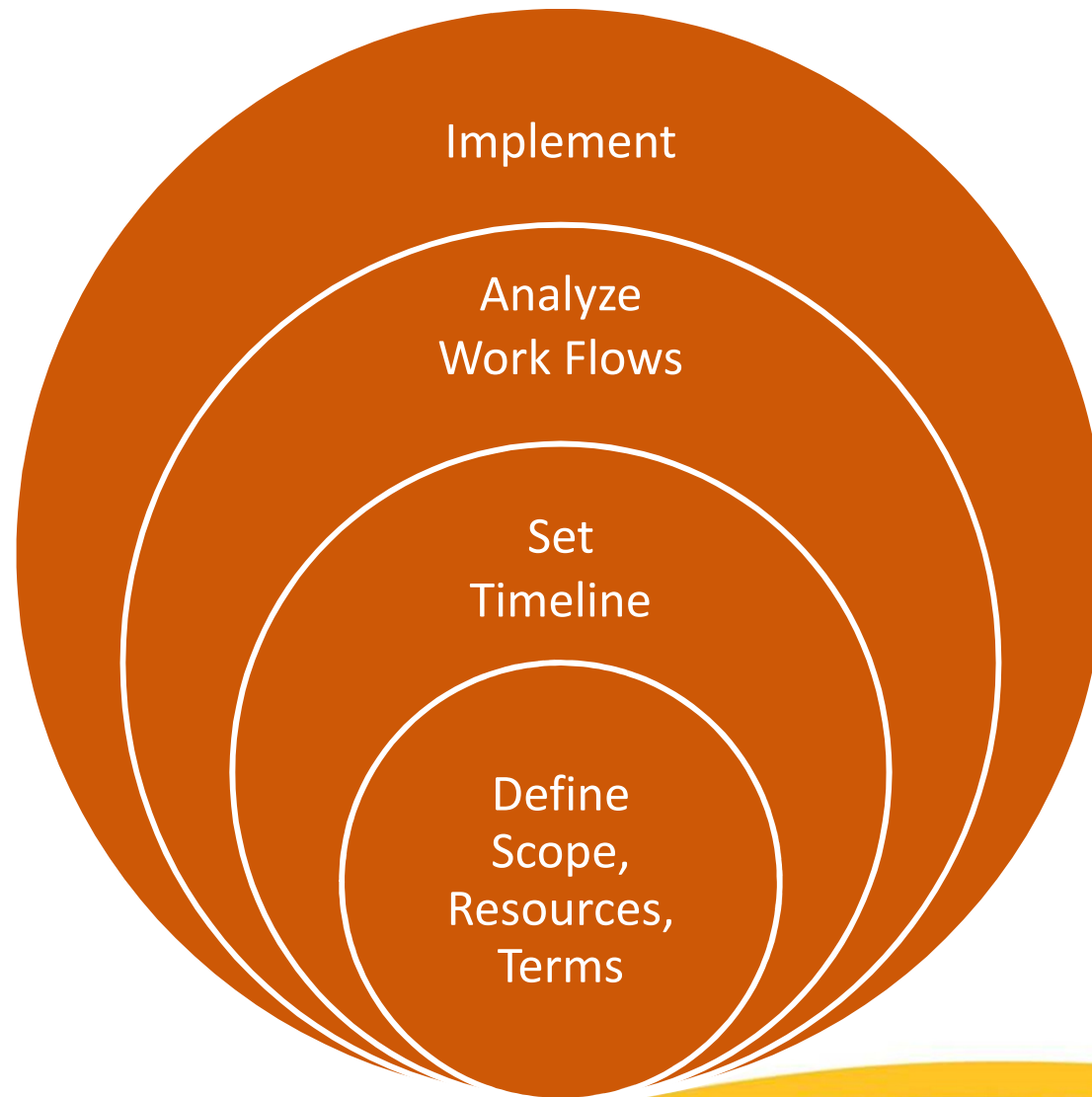
No Documents for 800529920 Andrew S. Graham

Paper documents for students beginning at Brockport prior to Spring 2012 are in their permanent paper record.



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The Imaging Project



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1A. Graduate Admissions

- Applicant Faculty Review Module
- Job Submission processes
- Population Selections
- Multiple Phases

PROSPECTIVE STUDENTS

CURRENT STUDENTS

ACCEPTED STUDENTS

STAY INFORMED



GRANTS & RESEARCH

ALUMNI PROFILE

STUDENT PROFILE

CONTACT US



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1A. Undergraduate Admissions

ADMR Code	Document Type	Item	Item Description
4506	EOP FORM	FA	4506T Form through IRS
A02	EOP FORM	FA	Electronic FAFSA
ADRD	WD/DEFER/UPDATE ADM		Adv. Dep. Reply Form - DECLINE
ADW2	EOP FORM		Copy of additional W-2 (add to original-do not sequence)
AI20	INTERNATIONAL DOC		I20
ALIM	EOP FORM	FA	Alimony
AP	TEST SCORES INFO		AP
APWV	APPLICATION FEE WAIVER		App Fee Waiver
AREG	INTERNATIONAL DOC		Proof of Citizenship
BIO	UG-SUPPLEMENT INFO		Student Biography
CHS	EOP FORM	FA	Child Support Verification
CIP	UG-SUPPLEMENT INFO		Courses in Progress
CLEP	TEST SCORES INFO		CLEP
CLT1-10	COLLEGE TRANSCRIPT	ceeb	College Transcript
D214	MILITARY PAPERS		DD214
EGC	UG-SUPPLEMENT INFO		Explanation of Grades

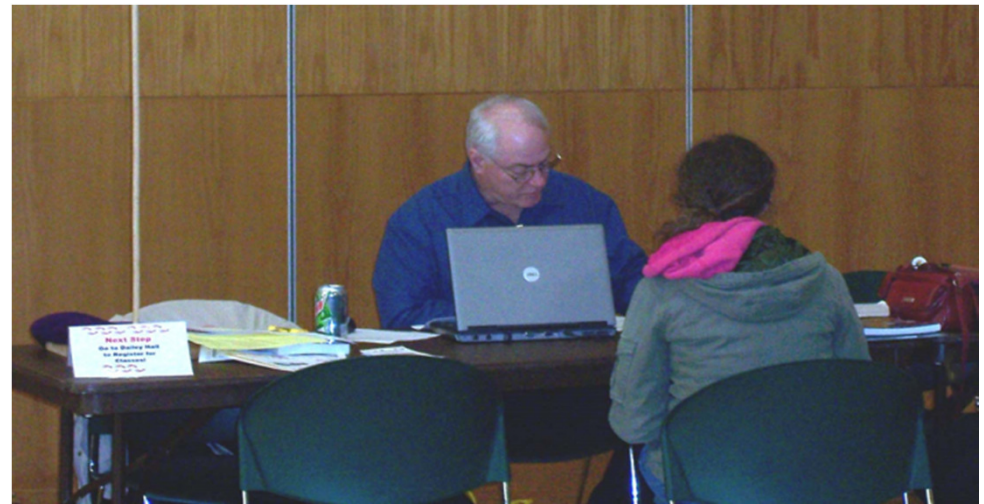


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1B. Academic Advisement

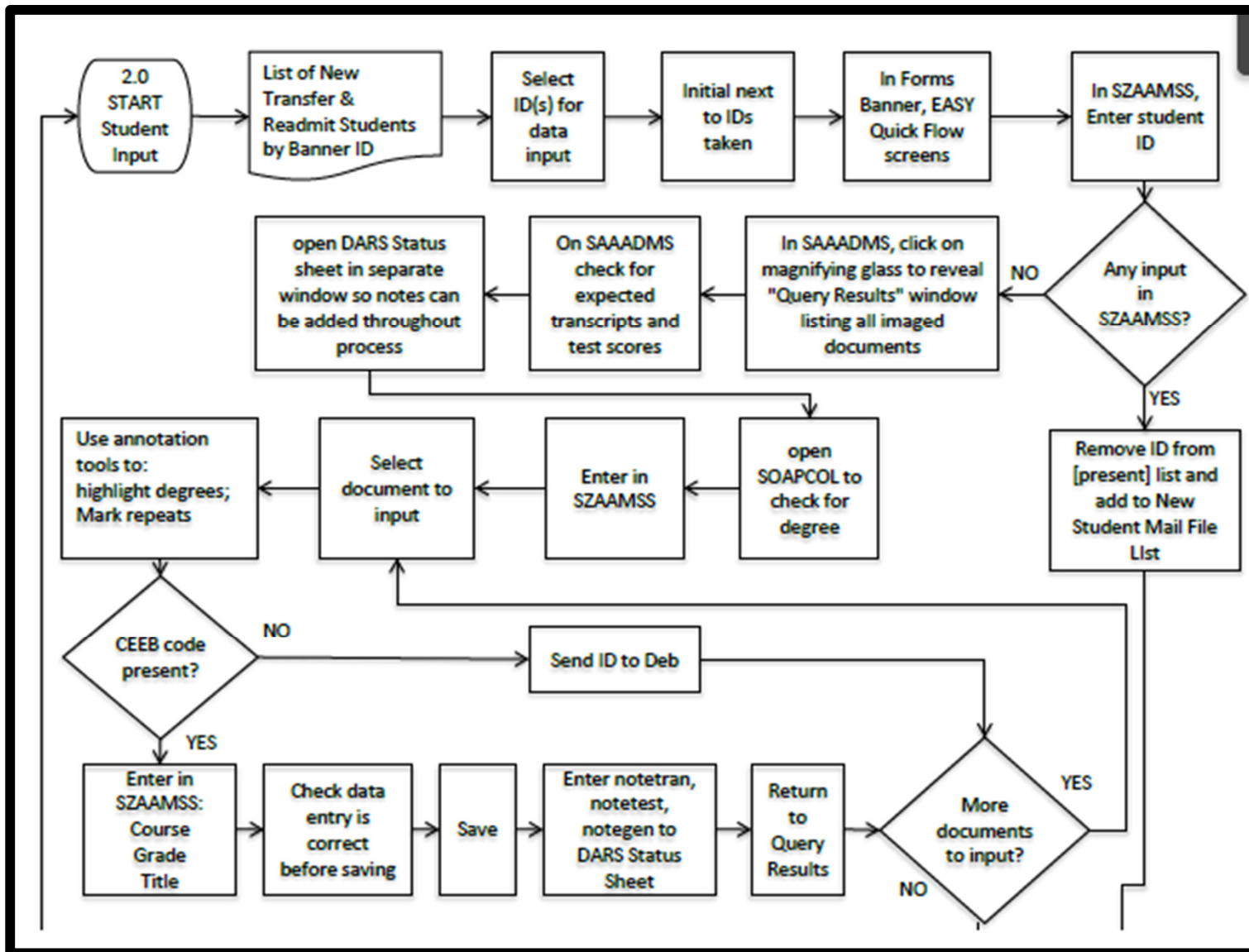
- Buying into the change
- Getting the word out
- Error Reports



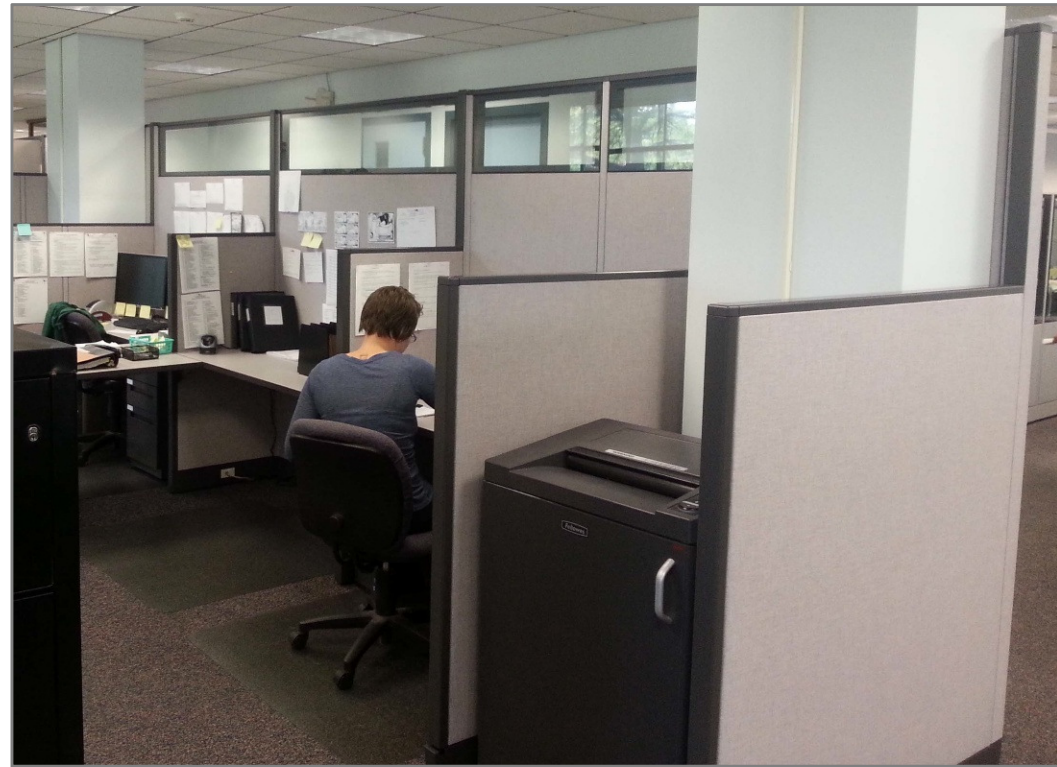
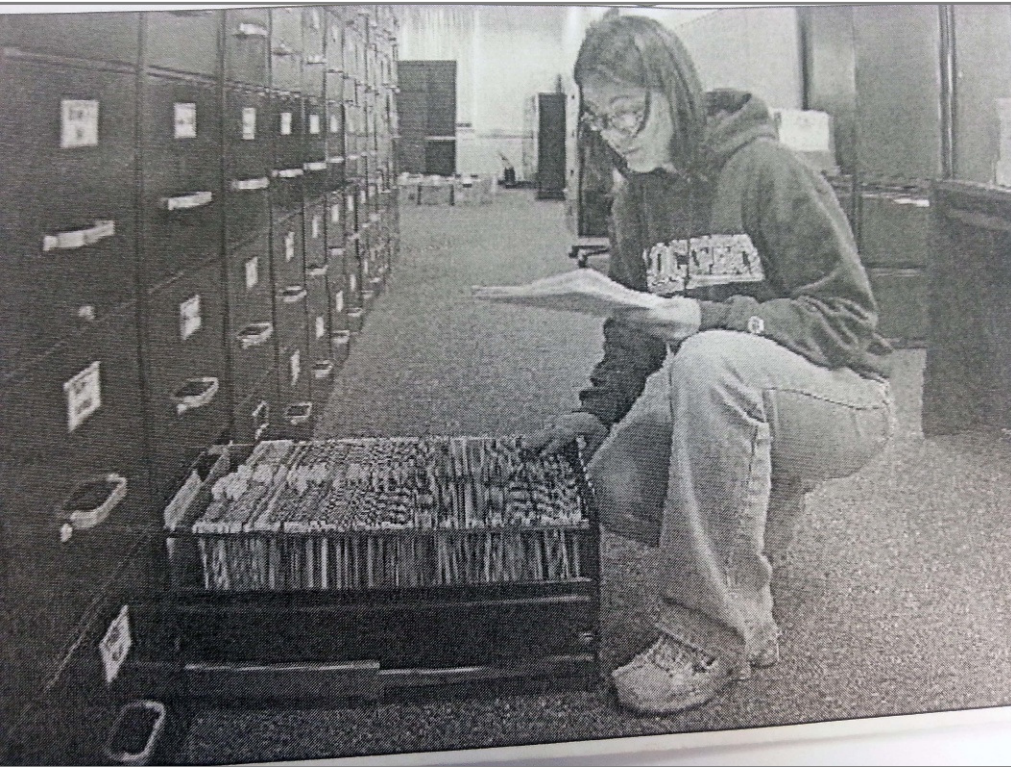
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1B. Academic Advisement



1C/D. Registration & Records/Financial Aid



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1E. Student Accounts & Accounting



- Best practices
- Benefits



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IT Customizations: Applications

The image displays two side-by-side screenshots of a web browser window showing a file directory structure. The browser is titled "ApplicationXtender Web Access .NET - Windows Internet Explorer" and the address bar shows the URL: <https://imagnetest.cis.brockport.edu/AppXtender/Main.aspx?QueryType=0&DSN=TEST&AppName=B-G-ID&ID=>

The left screenshot shows a file explorer view with a menu bar (File, Edit, View, Help) and a toolbar. The directory structure is as follows:

- TEST
 - _RSTAMP - RUBBER STAMP APPLICATION
 - B-A-ID - BANNER ADVANCEMENT COMMON
 - B-A-IDGP - BANNER ADVANCEMENT GIFT / PLEDGE
 - B-F-DOCS - BANNER FINANCE PURCHASING / AP
 - B-F-GRNT - BANNER FINANCE GRANT
 - B-F-ID - BANNER FINANCE COMMON
 - B-F-PROP - BANNER FINANCE PROPOSAL
 - B-G-ID - *** DO NOT USE *****
 - B-H-APPL - BANNER HR APPLICANT
 - B-H-EMPL - BANNER HR EMPLOYEE
 - B-H-ID - BANNER HR COMMON
 - B-R-ID - BANNER FINANCIAL AID COMMON
 - B-R-TREQ - BANNER FINANCIAL AID TRACKING REQ
 - B-S-ADMN - BANNER STUDENT ADMISSIONS
 - B-S-CRSE - BANNER STUDENT COURSE / ID
 - B-S-DGRE - BANNER STUDENT DEGREE
 - B-S-ID - BANNER STUDENT COMMON
 - B-S-SECT - BANNER CATALOG / COURSE SECTION

The right screenshot shows a similar view but with a filtered list of folders:

- TEST
 - B-G-ID - *** DO NOT USE ***
 - B-R-TREQ - BANNER FINANCIAL AID TRACKING REQ
 - B-S-ADMN - BANNER STUDENT ADMISSIONS

A green box at the bottom of the image contains the text: **Application View: Delivered vs. Customized**

At the bottom of the browser window, the status bar shows: User:PPFISTER; DataSource: TEST; Application: B-G-ID. The bottom right corner shows a local intranet icon and a zoom level of 150%.

IT Customizations: Document Types

B-S-ADM		
ACADEMIC STATUS	GR – PAPER APPLICATION	UG – APPLICANT REQUEST
ADDTL UNDERGAD TRNG AND EXP	GR – SCI WRITING SKILLS	UG-FELONY/DISCIPLINARY DOC
ADV – COURSE APPROVAL	GR – STATEMENT OF OBJECTIVES	UG – HOLISTIC SCORE SHEET
ADV – DARS STATUS SHEET	GR – TTD EXTENSION	UG – PAPER APPLICATION
ADV – DEGREE AUDIT	HIGH SCHOOL TRANSCRIPT	UG - SUPPLEMENT INFO
ADV – MAJOR DECLARATIONS	INTERNATIONAL DOC	UG – SUPPLEMENTAL APP
ADV – NOTICE OF AWARD	MILITARY PAPERS	
ADV – PLAN OF STUDY FOR FINAID	NAME CHANGE	
ADV – SUPPLEMENTAL INFO	OSA – NYS RESIDENCY DOC	
ADV – UG ADVISEMENT FOLDER	OSA – TUITION REFUND DOC	B-R-TREQ
APPLICATION FEE WAIVER	OSR – UG LEAVE OF ABSENCE	APPEAL FORM
CERTIFICATIONS	REFERENCE LETTER	APPLICATION PROCESS
COLLEGE TRANSCRIPT	REG – APPLICATION TO GRADUATE	BUDGET ADJUSTMENT
DECISION LETTER	REG – CLAM CONTRACT	CONSORTIUM AGREEMENT
EOP FORM	REG – COURSE WITHDRAWAL	EOP FORM
FERPA	REG – CREDIT BY EXAM	FEDERAL ACADEMIC PROGRESS
GR – AUDITION PORTFOLIO	REG – GR PLAN OF STUDY	FINANCIAL DOCUMENT
GR – CRITICAL ANALYSIS	REG – GRADE CHANGE	GRANTS AND SCHOLARSHIPS
GR – CURRICULUM CHANGE	REG – GRADUATION REVIEW	HOUSEHOLD SIZE
GR – EMAIL	REG – INCOMPLETE CONTRACT	LOAN APPLICATION
GR – EMPLOYMENT HISTORY	REG–INDEPENDENT/DIRECTED STUDY	LOAN PROCESSING
GR – ENGLISH WRITING SAMPLE	REG – LEGAL	NSLDS INFORMATION
GR – FELONY/DISCIPLINARY DOC	REG – OTHER	OFFICE USE/MISC DOC
GR – FIELD EVALUATION	REG – SUBSTITUTION WAIVER	OVERRIDES - PRORATED BUDGET
GR – LEAVE OF ABSENCE	REG – SUPPLEMENTAL GRADE/PR	PACKAGING/REVIEW
GR – FIELD EVALUATION	RETENTION POLICY	PLUS PROCESSING
GR – HISTORY WRITING	STUDENT SSN	STUDENT SOCIAL SECURITY CARD
GR – NEED FINAL TRANSCRIPT	TEST SCORES INFO	VERIFICATION

IT Customizations: Index Fields

File Edit View Help

Query Criteria for Application 'B-S-ADMN' Current Query: New Query

Show	Index Name	Search Value
<input checked="" type="checkbox"/>	ID	
<input checked="" type="checkbox"/>	PIDM	
<input checked="" type="checkbox"/>	DOCUMENT TYPE	*
<input checked="" type="checkbox"/>	LAST NAME	
<input checked="" type="checkbox"/>	FIRST NAME	
<input checked="" type="checkbox"/>	SSN	
<input checked="" type="checkbox"/>	BIRTH DATE	
<input checked="" type="checkbox"/>	TERM	*
<input checked="" type="checkbox"/>	APP#	
<input checked="" type="checkbox"/>	ADMR	*
<input checked="" type="checkbox"/>	ITEM	
<input checked="" type="checkbox"/>	ITEM DESC	
<input checked="" type="checkbox"/>	SEQ#	*
<input checked="" type="checkbox"/>	ACTIVITY DATE	
<input checked="" type="checkbox"/>	USER ID	

File Edit View Help

Query Criteria for Application 'B-R-TREQ' Current Query: New Query

Show	Index Name	Search Value
<input checked="" type="checkbox"/>	ID	
<input checked="" type="checkbox"/>	PIDM	
<input checked="" type="checkbox"/>	DOCUMENT TYPE	*
<input checked="" type="checkbox"/>	LAST NAME	
<input checked="" type="checkbox"/>	FIRST NAME	
<input checked="" type="checkbox"/>	SSN	
<input checked="" type="checkbox"/>	BIRTH DATE	
<input checked="" type="checkbox"/>	AID YEAR	*
<input checked="" type="checkbox"/>	TREQ	*
<input checked="" type="checkbox"/>	STATUS	*
<input checked="" type="checkbox"/>	FUND	*
<input checked="" type="checkbox"/>	SBGI	
<input checked="" type="checkbox"/>	PERIOD/TERM	*
<input checked="" type="checkbox"/>	SEQ#	*
<input checked="" type="checkbox"/>	DESC	
<input checked="" type="checkbox"/>	ACTIVITY DATE	
<input checked="" type="checkbox"/>	USER ID	

UserList*, N, R, S, X; Sample Format: ??????????

IT Customizations: Cross App Query

Cross Application Query Results

Document 1 - 15 of 2000

ACTIVITY DATE	ADMR	AID YEAR	APP#	BIRTH DATE	DESC	DOCUMENT TYPE
---------------	------	----------	------	------------	------	---------------

FIRST NAME	FUND ID	ITEM	ITEM DESC	LAST NAME	PERIOD/TERM	SBGI
------------	---------	------	-----------	-----------	-------------	------

SEQ#	STATUS	TERM	TREQ	USER ID	Application	Document ID	Pages
------	--------	------	------	---------	-------------	-------------	-------

Query Results for Application 'B-S-ADMN'

Document 1 - 9 of 9

ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE
----	------	---------------	-----------	------------	-----	------------

TERM	APP#	ADMR	ITEM	ITEM DESC
------	------	------	------	-----------

SEQ#	ACTIVITY DATE	USER ID	Document ID	Pages
------	---------------	---------	-------------	-------

IT Customizations: Double Indexes

File Edit View Options Help

Query Results for Application 'B-S-ADMN' [Modify Query](#)

Document 1 - 6 of 6


<input type="checkbox"/>	<input type="checkbox"/>	ID	PIDM	DOCUMENT TYPE	TERM	APP#	ADMR	ITEM	ITEM DESC	Document ID	Pages
<input type="checkbox"/>		[REDACTED]	[REDACTED]	HIGH SCHOOL TRANSCRIPT	201209	1	FHST	334887	ROCKY POINT JR-SR H	76471	2
<input type="checkbox"/>		[REDACTED]	[REDACTED]	HIGH SCHOOL TRANSCRIPT	201209	1	HST1	334887	ROCKY POINT JR-SR H	76471	2

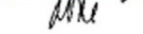


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IT Customizations: Document Level Security


MK


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January 2013



Dear :

The Office of Undergraduate Admissions thanks you for your continued interest in The College at Brockport, State University of New York. In reviewing your application and supporting documents, we noticed that you did not disclose your Social Security Number when you applied using either the SUNY application or Common Application. This will cause your Financial Aid package to be delayed.

To expedite your financial aid package, please complete and return this letter to our Office and we will update your information:


Office of Undergraduate Admissions
The College at Brockport
350 New Campus Drive
Brockport, NY 14420

Social Security Number: 

Signature:  Date: 1/14/13

If you have any questions or concerns, please contact the Office of Undergraduate Admissions at (585) 395-2751 or email us at admit@brockport.edu.

We look forward to your response.

Sincerely,

Bernard S. Valento
Director of Undergraduate Admissions
BSV/dtg

350 New Campus Drive - Brockport, New York 14420 2015 www.brockport.edu
585-395-2751 - Fax: 585-395-5412 - admit@brockport.edu

**Substitute
Confidential
Form**


*The original is
filed at:*



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IT Customizations: Document Display




TEST - CAMPUS INFORMATION SYSTEM

Banner Document Management Results Page

WARNING - Could take up to a minute to display the first requested image.
If you have questions about these documents, please contact the appropriate office. Click the **HELP** link above to view the legend.

ID	TYPE	Document ID	Link
8005 [REDACTED]		111353	Display Document
8005 [REDACTED]		62976	Display Document
8005 [REDACTED]		62977	Display Document
8005 [REDACTED]		62980	Display Document
8005 [REDACTED]		62982	Display Document



TEST - CAMPUS INFORMATION SYSTEM

[Personal Information](#) [Faculty Services](#) [Alumni and Friends](#) [Student Services](#) [Career Services](#) [New WebTailor Administration](#) [Library Ordering Module](#)

[SITE MAP](#) [HELP](#) [EXIT](#)

Documents for 800 [REDACTED] Lauren B [REDACTED]

WARNING - Could take up to a minute to display the first requested image.
If you have questions about these documents, please contact the appropriate office. Click the **HELP** link above to view the legend.

- [CLEVELAND STATE COLLEGE TRANSCRIPT](#)
- [ROCHESTER I T COLLEGE TRANSCRIPT](#)
- [RESUME GR - EMPLOYMENT HISTORY](#)
- [BUCKLEY REFERENCE LETTER](#)
- [POSTL REFERENCE LETTER](#)
- [SARROWSKI REFERENCE LETTER](#)
- [UPDATE FOR SUMMER 13 WD/DEFER/UPDATE ADM](#)

[Return to Previous](#)

RELEASE: 8.0

IT Customizations: Field Order, Dropdowns

File Edit View Help

{Null}
1HOL
4506
A02
ADDRD
ADW2
AI20
ALIM
AP
APWV
AREG
BIO
CHS
CIP
CLEP
CLT1
CLT2
CLT3
CLT4
CLT5
CLT6
CLT7
CLT8
CLT9
CL10
CL11
CL12
CL13
CL14

Query Criteria for Application 'B-S-ADMN'

Show	Index Name
<input checked="" type="checkbox"/>	ID
<input checked="" type="checkbox"/>	PIDM
<input checked="" type="checkbox"/>	DOCUMENT TYPE
<input checked="" type="checkbox"/>	LAST NAME
<input checked="" type="checkbox"/>	FIRST NAME
<input checked="" type="checkbox"/>	SSN
<input checked="" type="checkbox"/>	BIRTH DATE
<input checked="" type="checkbox"/>	TERM
<input checked="" type="checkbox"/>	APP#
<input checked="" type="checkbox"/>	ADMR
<input checked="" type="checkbox"/>	ITEM
<input checked="" type="checkbox"/>	ITEM DESC
<input checked="" type="checkbox"/>	SEQ#
<input checked="" type="checkbox"/>	ACTIVITY DATE
<input checked="" type="checkbox"/>	USER ID

ApplicationXtender We...

File Edit View Help


{Null}
A04A
A04W
A08A
A08B
A14T
A19A
A24A
A24B
A24C
A26
A34
A351
A352
AL01
AL02
AL06
AL07
AL11
AL12
AL13
APPLTR
D01
D02
D031
D032
D041
D042
EMIN

Query Criteria for Application 'B-R-TREQ'

Show	Index Name
<input checked="" type="checkbox"/>	ID
<input checked="" type="checkbox"/>	PIDM
<input checked="" type="checkbox"/>	DOCUMENT TYPE
<input checked="" type="checkbox"/>	LAST NAME
<input checked="" type="checkbox"/>	FIRST NAME
<input checked="" type="checkbox"/>	SSN
<input checked="" type="checkbox"/>	BIRTH DATE
<input checked="" type="checkbox"/>	AID YEAR
<input checked="" type="checkbox"/>	TREQ
<input checked="" type="checkbox"/>	STATUS
<input checked="" type="checkbox"/>	FUND
<input checked="" type="checkbox"/>	SBGI
<input checked="" type="checkbox"/>	PERIOD/TERM
<input checked="" type="checkbox"/>	SEQ#
<input checked="" type="checkbox"/>	DESC
<input checked="" type="checkbox"/>	ACTIVITY DATE
<input checked="" type="checkbox"/>	USER ID

UserList
A19A, A

IT Customizations: SSB Link



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[Personal Information](#) [Faculty Services](#) [Alumni and Friends](#) [Career Services](#) [Library Ordering Module](#)




[RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)


Advisee Listing

Summer 2014
Oct 26, 2013 04:38 pm

*** Imaged Documents and Condition(s) of Admission are available for students with entry term of Spring 2012 and greater.

Advisee Listing

Student Name	ID and Campus Email	Advisor Type	Advisement Key Number	Student Information	Holds	Last Term Reg	Brockport Transcript	Degree Audit	Imaged Documents	Condition(s) of Admissions	Comments
 Amanda J.	800  	General		View	View	201309	View	DARS	Display	Unavailable	Enter 0 Public

[Email your advisees](#) 



IT Customizations: New

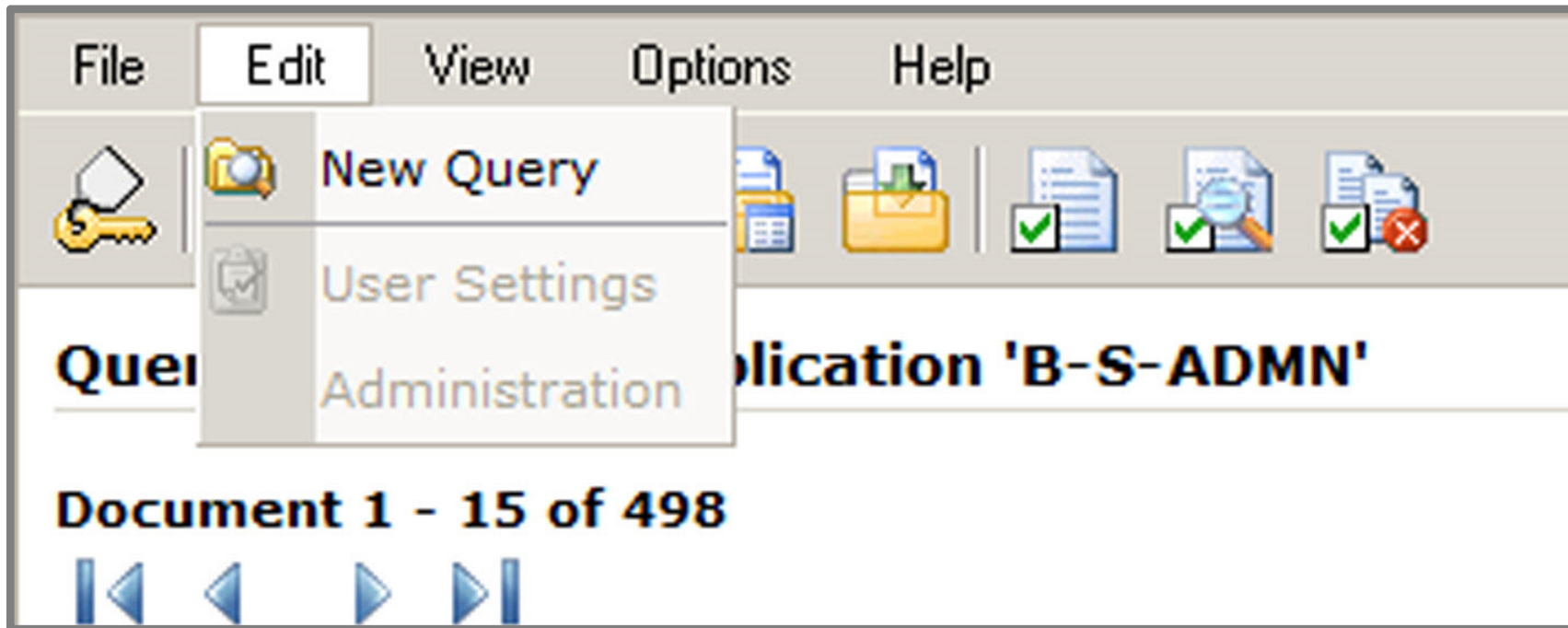
- Views
- DLS respects FGAC SSN masking rules
- Job Submission processes
- SSB packages/web pages



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IT Customizations: Grey Out



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IT Customizations: Default User ID

Page Help

B-S-ADMN - test

Index Name	Field Value
ID	8005[REDACTED]
PIDM	603218
DOCUMENT TYPE	DECISION LETTER
LAST NAME	CULBERTSON
FIRST NAME	A[REDACTED]
SSN	1[REDACTED]51
BIRTH DATE	[REDACTED]
TERM	
APP#	
ADMR	
ITEM	
ITEM DESC	
SEQ#	
ACTIVITY DATE	2013-09-17 13:18:48
USER ID	

Save

File View Document Page Help

Index Name	Field Value
ID	8005[REDACTED]
PIDM	603218
DOCUMENT TYPE	DECISION LETTER
LAST NAME	CULBERTSON
FIRST NAME	A[REDACTED]
SSN	*[REDACTED]51
BIRTH DATE	20-01-1992
TERM	
APP#	
ADMR	
ITEM	
ITEM DESC	
SEQ#	
ACTIVITY DATE	2013-09-17 13:20:36
USER ID	TEST PMAXWELL

Modify



Lessons Learned

1. Department involvement.
2. Start date must fit within admissions enrollment cycle.
 - Our "line in the sand" was Spring 2012.
3. Documentation is essential and EVER evolving.
4. Life cycle management includes changing needs of project.



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Lessons Learned (cont'd)

5. Benefits are well worth time (and pain) invested.
6. Be willing to adapt
7. Quality control impacts everyone



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Next Steps for: Document Imaging Steering Committee

- Retention Guidelines/Auto-delete process
- Identify other departments that can benefit



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Next Steps for: Departments

- Local Documentation
- Infrequent set-up processes
- Imaging Liaisons' duties and responsibilities
- Train the trainer
- Process in-house, or outsource, pre-201202 paper folders



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Next Steps for: IT

- SDE associated with document types to contain indexing practices and retention rules
- Create imaging security classes within Banner Security and utilize them to create imaging users and permissions
- Implement new file cabinet for faculty departmental documents
- More Review modules



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Questions?

2. IT: Patty Pfister, ppfister@brockport.edu

Project Management: Pat Maxwell, pmaxwell@brockport.edu

1A. UG Admissions: Megan Sarkis, msarkis@brockport.edu

1A. Graduate Admissions: Julian Ortiz, gradadmit@brockport.edu

1B. Academic Advisement: Deb Birkins, dbirkins@brockport.edu

1C. Registration & Records: Peter Dowe, pdowe@brockport.edu

1D. Financial Aid: Heather Allen, hallen@brockport.edu

1E. Student Accounts: Colleen Fagan, cfagan@brockport.edu



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