

STREAM PORTAL: SECURE, FLEXIBLE, TIMELY DOCUMENT DELIVERY

Give your customers secure, seamless online access to their documents

Managing customer documents can be a major administrative and security burden, as well as a slow and expensive process. Many financial institutions resort to mailing documents in order to ensure security.

What if there was a secure, online portal that automatically notified permissioned users that their documents were available – and provided the ability for firms to upload documents quickly and efficiently?

SunGard's Stream Portal solution can offer just that. With Stream Portal, financial institutions can give their correspondent banks, affiliates, retail clients and remote salespeople secure access to any type of document, including investment portfolio reports, analytics, trade confirmations and historical reports, through the Internet. Depending upon the originating system, this information can be uploaded to the Stream Portal in real time or overnight. Customers receive an e-mail notification with a direct link to the document, significantly speeding up existing delivery processes while ensuring security.

This secure channel is supported by a flexible and user-controlled permissioning system. The customer can set rules regarding the delivery of confirms and statements and specify access on an end user or group level. Only permissioned users have access to the documents. Stream Portal's audit function tracks numerous activities, including when the file is loaded or overwritten and who opens a report and when.

Positions can be downloaded and imported into external applications, including investment portfolio inventory and safekeeping positions. Stream Portal is vendor-neutral and can work with SunGard, third-party and proprietary applications and files.

The service is white labelled, allowing institutions to retain their branding. In some cases, single sign on will be available, so that once clients log into the institution's Web site, they do not have log in again in order to access their documents.

SunGard hosts the service, so neither the institution nor their clients need to download or install any software or hardware. As such, Stream Portal is completely redundant, with full disaster recovery, firewall protection and security. And because it is Web-based, clients can access the information from anywhere in the world – including from home – if they have permission to do so.

KEY ADVANTAGES OF STREAM PORTAL:

- Offers a secure channel for delivering any type of document to your clients
- Can be white labelled to match the look and feel of the institution's Web presence, reinforcing branding
- Offers the full security and redundancy of a SunGard-hosted service
- Provides a complete audit trail
- Features a flexible permissioning model
- Supports automated two-way messaging
- Requires no onsite installation
- Supports single sign on, using industry-standard protocols (availability depends upon individual cases)
- Can distribute any type of information and works with a variety of SunGard, third-party and proprietary systems because it is written from the ground up as a native CSA application
- Supports real-time delivery and overnight turnaround of information (depending upon the originating system)

NEED MORE INFORMATION?

Please contact your sales representative at + 1-800-825-2518 or visit us at www.sungard.com/stream.

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