FINASTRA

FUSION ECM

Capture, Manage, Store, Preserve and Deliver Content in a Hosted Environment

" At Finastra, we realize enterprise content management is not a one-size-fits-all solution. "

Keeping pace in today's competitive marketplace requires the ability to organize, manage and share information effectively and efficiently. However, using internal resources to manage the content and information generated throughout an organization can be a difficult and time-consuming task.

With Fusion ECM outsourced services, your financial institution can leverage Finastra infrastructure, software technologies and advanced security measures to electronically store and deliver information.

Fully Outsourced Enterprise Content Management Solution
To help maximize operational efficiencies, more organizations are turning to outsourced document and information management solutions. Outsourcing this key function allows your financial institution to not only reduce or eliminate your reliance on paper-based systems, but also improve control of information and reduce overall costs associated with information management.

Fusion ECM is a browser-based system, which means your employees will be able to quickly access archived content from any PC within your financial institution rather than having to search through multiple applications or

paper documents. There are no restrictions regarding the number of users and proprietary software is not required.

Built-in features continually monitor for and process new content. When new content is detected, it is automatically stored, indexed and immediately available for research and delivery. To help ensure your financial institution is able to keep track of content changes across the organization, user functions performed within the system are tracked and available for review.

At Finastra, we realize enterprise content management is not a one-size-fits-all solution. That's why Fusion ECM offers a full suite of modules that can be tailored to meet your current and future needs.

Reports
Reports for Fusion ECM allow you to replace traditional COLD client server systems with a robust report archive.

THE FUTURE OF FINANCE IS OPEN

Unique technology allows the system to categorize reports automatically

Documents for Fusion ECM allows you to store, retrieve, view, print and have instant access to all of your critical business documents.

> " With just a few clicks, you can easily see which individual documents are missing or which loans have an exception due to a missing, expiring, or expired document. "

It is a powerful tool for managing, storing and retrieving your important reports from any number of systems, including core, item processing, electronic funds transfer, as well as many others.

Within Fusion ECM, users can define their own report views, streamlining the tasks before them. Unique technology allows the system to categorize reports automatically, and enables users to search for specific text inside of a report quickly and easily. As an added benefit, automatic formatting ensures reports are viewed with an ideal font size and orientation, maximizing the amount of data that fits on a page while minimizing the amount of space around the borders.

When users are required to review a report each day, they can add a note to the report stating they have reviewed it. Additionally, records of user activity are associated with every document so that you can verify at a later time that the user did actually view the report in addition to adding the note.

Documents
Documents for Fusion ECM allows you to store, retrieve, view, print and have instant access to all of your critical business documents.

Scan documents by account number or tax ID and allow Fusion ECM to automatically link relevant customer information such as name, phone number, email address and mailing address to everything you scan.

This allows for several methods of document retrieval, including customer name, account number, tax identification number, document type and other user-defined indexes.

The private searches feature allows highly specific, frequently used searches to be saved by any user for future use. To help minimize administrative costs, the scanning software allows you to scan multiple pages at one time. Depending on the type of scanner, you can load a stack of paper documents into an auto document feeder for rapid processing.

Documents for Fusion ECM allows you to set up document lists required for each type of loan. With just a few clicks, you can easily see which individual documents are missing or which loans have an exception due to a missing, expiring, or expired document. Fusion ECM also leverages the relationships between accounts, customers, and guarantors as defined within core so that when you require financial statements for guarantors, you define this once for a loan type and the system will automatically track whether an appropriate document has been archived for every guarantor associated with that loan.

Distributed Capture
Fusion ECM's distributed capture function is a lightweight, easily deployed desktop application that provides a simple interface for importing electronic files and entering index values.

Paired with a multi-function device that can scan to PDF or an application that can print to PDF, distributed capture can be used to quickly import these documents without resorting to printing and scanning. You can quickly rearrange or delete pages and group pages into multiple documents with an easy to use interface. With distributed capture:, you can also import documents in any format such as Microsoft Office documents, sound or video files, HTML files, and more.

Items
Items for Fusion ECM allows you to research items stored from virtually any capture source. Search results can be saved giving users the ability to personalize their view into the archive. By creating "private" searches, you view only the information that is important to you.

Complete teller transactions are reconstructed from single item matches, and personal viewing preferences for image size lets users view images the way they want to.

Users can activate a "View Signatures" window that will display a customer's signature card right next to the check image for electronic viewing and signature verification. Item data can be exported directly from the results grid to either a printer or Microsoft Excel.®

Because Fusion ECM items delivers images for viewing in PDF format, your customers' images can be delivered to them in a common, easy to use format. This results in an efficient, cost-effective tool for responding to requests from customers or internal personnel for information related to transactions.

Statements
Statements for Fusion ECM allows you to archive various types of statements from your host system, as well as third-party applications that generate statements. This includes checking and savings statements, account analysis statements, trust statements, loan statements, overdraft notices and more. If there are images associated with the statement(s) you are searching for, the appropriate images will be automatically attached to them for viewing and printing.

Enterprise Services Center
Our Enterprise Services Center is the nerve center for ActiveView Content Management. The enterprise services center is the heart of Fusion ECM. Committed to service and security, this state-of-the-art facility deploys multiple measures for system availability and data security, using the latest industry standard hardware and software backed by a team of veteran technical experts to support clients. The Enterprise Services Center deploys the following security measures to ensure data protection:

- Annual penetration testing
- Quarterly vulnerability testing
- Redundant firewalls
- ActiveView Content Management System access occurs over secure, encrypted lines
- Restricted access to the facility and data center

Fusion ECM, the Right Choice for Your Financial Institution
- Built on Microsoft technologies including Windows Server 2012, SQL Server 2012, Silverlight, and .NET Framework 4.0
- Browser-based system
- Runs in Internet Explorer®
- Stores and delivers information
- Provides fast, easy and consistent access to information
- Single, scalable, long-term archive
- Highly personalized user interface with a powerful indexing and search engine
- Highly customizable security system allows you to restrict user access to specific content and functions
- Automatic processing of content into the archive to streamline availability and minimize administrative workload
- Document retention policies can be configured to control when content is purged from the system
- Notes can easily be added to any record in the system to explain any exceptions or call out additional information associated with that record.

About Finastra

Finastra unlocks the potential of people and businesses in finance, creating a platform for open innovation. Formed in 2017 by the combination of Misys and D+H, we provide the broadest portfolio of financial services software in the world today—spanning retail banking, transaction banking, lending, and treasury and capital markets. Our solutions enable customers to deploy mission critical technology on premises or in the cloud. Our scale and geographical reach means that we can serve customers effectively, regardless of their size or geographic location—from global financial institutions, to community banks and credit unions. Through our open, secure and reliable solutions, customers are empowered to accelerate growth, optimize cost, mitigate risk and continually evolve to meet the changing needs of their customers. 90 of the world's top 100 banks use Finastra technology. Please visit **finastra.com**

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