



Factsheet

Capture, manage, and store content with Fusion ECM, a complete enterprise content management solution.

Keeping pace requires the ability to organize, manage and share information effectively and efficiently. Fusion ECM does all that and more from Microsoft's trusted Azure cloud.

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Using internal resources to manage the content and information generated throughout an organization can be a difficult and time-consuming task. But with Fusion ECM, your financial institution can leverage Finastra's infrastructure, software technologies and advanced security measures to electronically store and deliver information.

Fully monitored enterprise content management solution

To help maximize operational efficiencies, more organizations are turning to managed and monitored document and information management solutions. By outsourcing this key function, you 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 browser-based, which means your employees are able to quickly access archived content from any work PC rather than having to search through multiple applications or paper documents. There are no restrictions on the number of users and proprietary software is not required.

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.

Finastra understands that 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.

Confidence from Microsoft Azure

Being housed on Microsoft's trusted Azure cloud, Fusion ECM is part of a large community of businesses and data brought together in a secure place. Security and privacy are built in the Azure platform, and Microsoft is committed to the highest levels of trust, transparency, standards conformance, and regulatory compliance with the most comprehensive set of compliance offerings of any cloud service provider. For you, it means your information will be available anytime you need it.

Reports

Reports for Fusion ECM allow you to replace traditional COLD client server systems with a robust report archive. It can store reports from any number of systems, including core, item processing, electronic funds transfer, as well as many others.

When users are required to review a report each day, they can add a note stating they have reviewed it.

Documents

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 the 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 allows you to research items stored from virtually any capture source. Because Fusion ECM items delivers images for viewing in PDF format, your account holders' images can be delivered to them in a common, easy to use format which is an efficient, cost-effective tool for responding to account holder requests

Statements

Statements allows you to archive various types of statements from your core 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.

Receipts

With receipts, you can store transaction receipts generated in the Fusion Phoenix core system and automatically email a copy of the receipt to the account holder.

Develop lean practices with Fusion ECM, you can establish lean practices by reducing your reliance on paper and decreasing shipping and storage costs. Manage content according to your organization's business rules, measure the health of those processes in real time, and adjust to grow leaner with each modification.

About Finastra

Finastra is building an open platform that accelerates collaboration and innovation in financial services, creating better experiences for people, businesses and communities. Supported by the broadest and deepest portfolio of financial services software, Finastra delivers this vitally important technology to financial institutions of all sizes across the globe, including 90 of the world's top100 banks. Our open architecture approach brings together a number of partners and innovators. Together we are leading the way in which applications are written, deployed and consumed in financial services to evolve with the changing needs of customers. Learn more at finastra.com

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North American Headquarters

744 Primera Boulevard
Suite 2000
Lake Mary, FL 32746
United States
T: +1 800 989 9009

