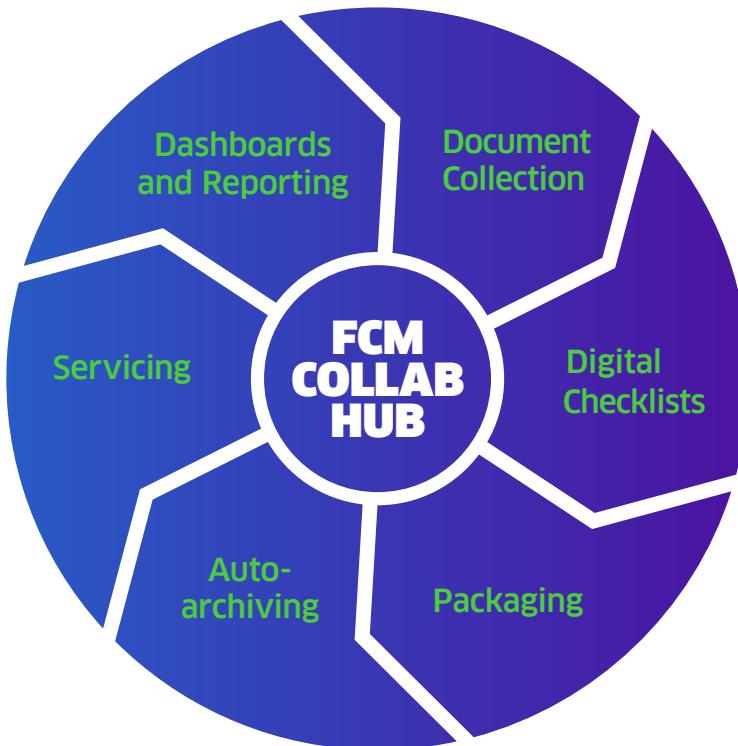# FIS

FCM COLLABORATION HUB

Secure document collection and automation
to accelerate account and loan onboarding

FIS CONTENT MANAGEMENT (FCM) COLLAB HUB

- Dashboards and Reporting
- Document Collection
- Digital Checklists
- Packaging
- Auto-archiving
- Servicing

FCM COLLAB HUB

KEY BENEFITS AND COMPETITIVE ADVANTAGE

- Automate document collection from your customers

- Automate tasks required to collaborate across internal teams

- 25-50% reduction in time spent on manual tasks related to onboarding

- Integrated delivery to document archive

- Standardize processes

- Enforce process compliance

- Secure collaboration with customers

- Retain order as documents move through onboarding workflows

- Easily configure a SiteDrop page to support each of your products

- Integrated eSignature

- Elegant customer interface

FCM Collaboration Hub Overview

The FIS® Content Management (FCM) Collaboration Hub simplifies gathering, organizing, storing and packaging information for efficient delivery both inside and outside your organization, and when combined with the FCM Document Archive, it covers a document's full lifecycle.

Its responsive and intuitive web-based design means your customers can interact from anywhere, anytime and on any device.

Document Collection

SecureInbox
SecureInbox is an enterprise solution that allows each of your employees to maintain a public-facing webpage that customers can access 24/7; links can be embedded in email signatures with a call to action such as "Send Me Files Securely."

A file submission by a customer opens a secure chain of communication, providing a simple, secure and efficient web presence for all members of the team.

Efficient file import
FCM Collaboration Hub accepts over 100 file types, up to 1GB in size, and emails a date- and time-stamped record to your customer with a description of each document they have submitted.

Files are scanned with an industry-leading antivirus solution before they enter your instance of the hub. File types that are not supported by FCM can be converted to a PDF on the fly in the Collaboration Hub.

Automated reminders
Set schedules, expiration dates and automated reminders when requesting documents from customers.

Messaging
Securely communicate with customers through SecureInbox submissions or digital checklists, keeping communications out of email and within a secure location – the Collaboration Hub.
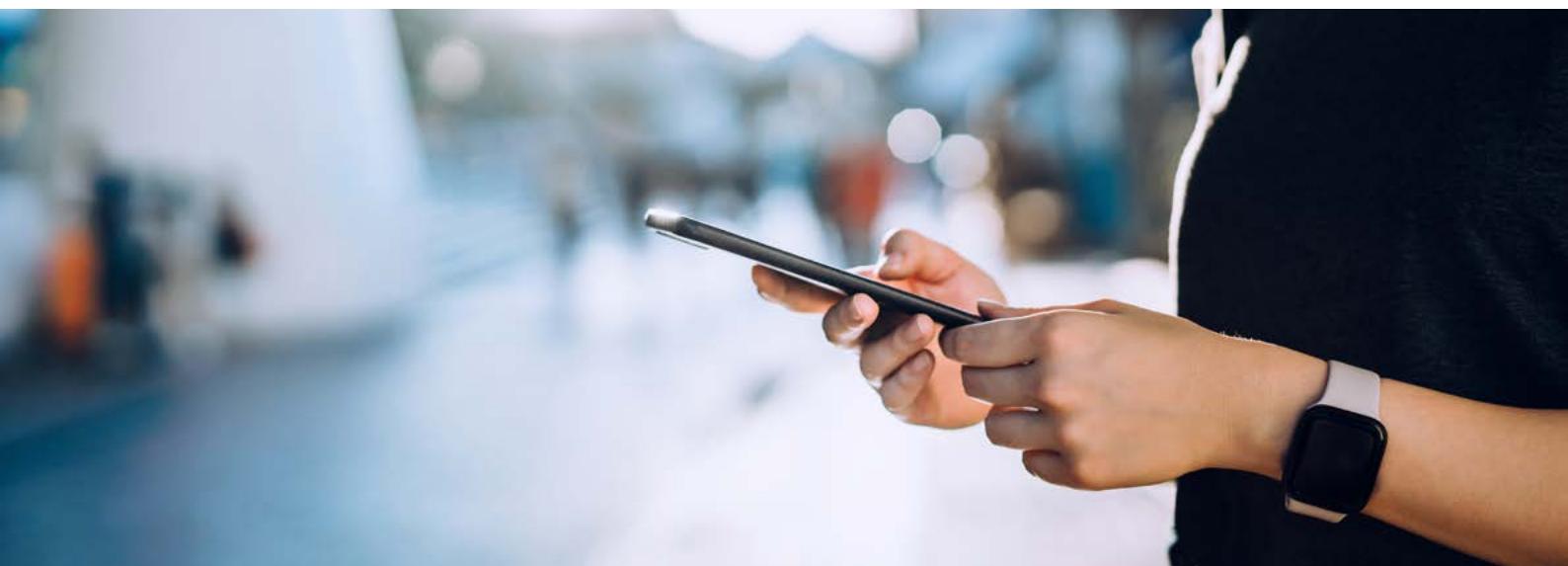
SiteDrop: online information gathering
Guide your customers to a new business workflow by configuring a SiteDrop page to support each of your products. Customize questions, map answers directly to PDFs in your document library, optionally collect initial documents or run filtering steps and kick off digital checklists within the Collaboration Hub.

Intelligent Application Funnel™
An advanced version of SiteDrop, Intelligent Application Funnel allows you to administer a sophisticated product routing application using decision-tree logic. Responses to initial questions determine questions that follow and ultimately determine the checklist or automation you want to trigger upon submission.

Because of the custom nature, Intelligent Application Funnel is usually implemented as a Phase II under a separate SOW. They are incredibly powerful tools for bringing high-quality deals into the Collaboration Hub.

Digital Checklists

Checklist templates
Checklist templates enable you to standardize processes for deals large or small, simple, or complex. These templates also enable auto-generation of checklists, triggered by various inputs such as application submissions. The Collaboration Hub also provides simple tools to customize your non-standard deals.

Checklist process automation
Drive process efficiencies by structuring checklists into multiple stages. This enables request staggering based on deal stages or single deal division into requests for various parties.

As checklist stages or document statuses change, custom actions like e-signatures or integrations like API calls or webhooks automatically complete. The multi-user checklist view allows for internal message exchange and collaboration for coordinated onboarding task execution. Setup is straightforward with an intuitive drag-and-drop interface and expert training.

Single/multi-party document requests
Checklists can be effortlessly segmented into numerous separate document requests. This process aids in the accumulation of documents from a variety of parties. A color-coded view, reflecting the current status, is made available to end users. This view indicates the documents provided and the existing stage of the deal.

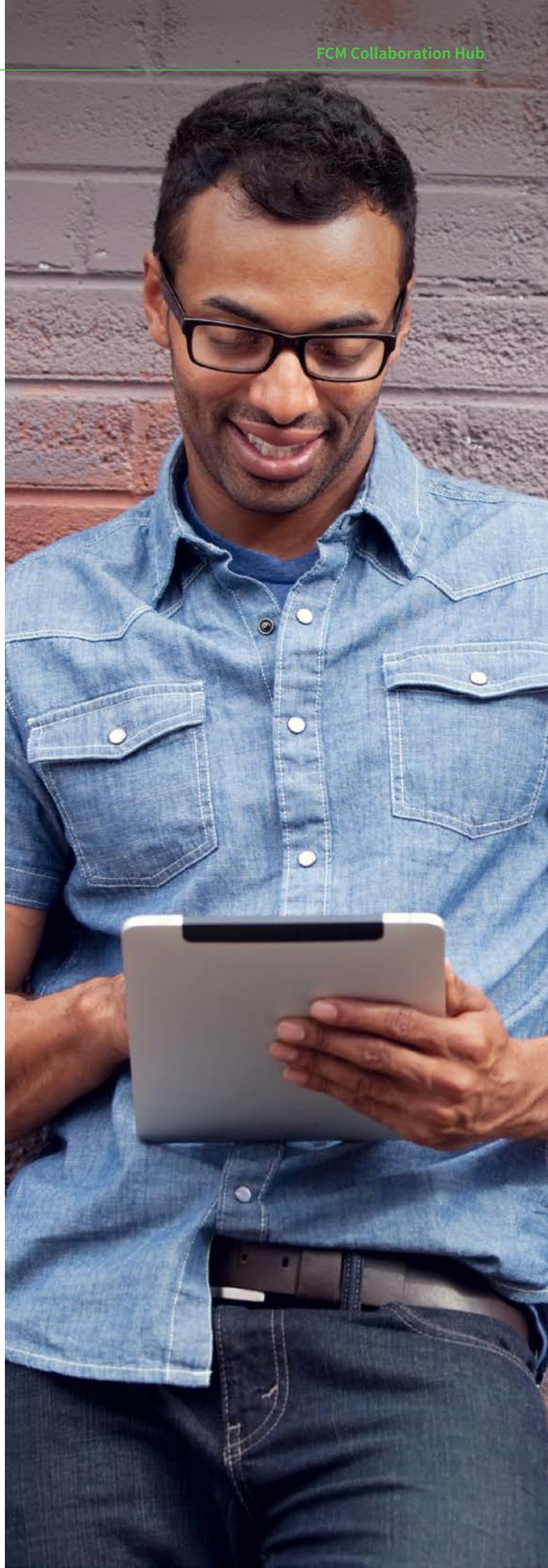### No account setup for customer
Document requests are delivered via email containing an encrypted link accessed with a security key. Your customer is thus not required to set up a username/password; they can simply bookmark the page in their browser and return to it for status updates throughout the process.

eSignature
Customers expect the convenience and safety of eSignature . The platform offers seamless integration with DocuSign. Once the system has been configured with your business rules for templates, routing and signature block locations, you'll want to use eSignature for every document that requires execution.

Recommendation Engine
The Recommendation Engine™ auto-suggests documents you've previously received via the hub so you don't ask for things twice!

Dashboards and Reporting

Dashboards
The dashboard provides a dynamic, intuitive view of workflows at a glance, easily accessible by mobile devices as well as desktop. Dashboards display pipeline reporting, estimated closings by date, workload by team member and other information with drill-down menu functionality.

Reporting
You can create comprehensive reports on activities in the Collab Hub! Quick, easy reporting on system data fields, usage metrics and deal-specific information is at your fingertips.

Document Packaging

Advanced document preview and edit
The packaging function allows users to rearrange collected documents into pre-defined packages, so they are in the same order every time. This allows sharing of certain document sets with various internal and external parties including SBA loan audits, loss mitigation packages and legal reviews.

Your preferred version of the checklist is available with a few clicks, as a zip or single PDF – shareable via a secure link.

Secure file distribution and alerts
Packaging enables secure transmission of files. Whether sent internally or externally, workflow tracks each package and notifies the sender once it has been accessed and opened.

Automatic archiving
Automatic indexing to FCM – up to 85% quicker compared to manual indexing.

Optional Enhancement Suite

Document servicing
Easily service and request documents that are tracked in your FCM Document Tracking report. Your customers can then securely upload them so you can review and index to FCM, in turn fulfilling the document requirement.

Advanced FCM Report Viewer
Create dynamic, customizable queries from any FCM COLD report that's in .csv or delimited format! This empowers your teams to access crucial report details directly within the Hub, enhancing efficiency and decision-making.

Letter writing
Simplified automation of your in-house letter generation. FCM COLD report query data, created in Advanced FCM Report Viewer, can be used to populate information in your letters, facilitating quick, in-house creation of small batches of letters.

To learn more, please visit the FCM Collab Hub webpage here.

ADVANCING THE WAY THE WORLD PAYS, BANKS AND INVESTS™