



FIS Content Management

Leverage the content management solution from FIS to transform your business processes

FIS Content Management Overview

FIS Content Management (FCM) is a solution used to efficiently store, manage and access information across your organization. The FIS Content Management suite provides a complete document imaging and tracking system, COLD report storage and archive with a built-in business process automation tool.

Competitive Advantage

Managing financial documents and reports through traditional, paper-intensive processes is a challenge for many financial institutions as they grow and evolve in today's increasingly paperless environment. This very same challenge is then magnified when multiple users – and in some cases, formal approval processes – are required to move forward with loan and deposit information, invoices, HR documents or other important financial documents. For many institutions, the inability to track these documents is the barrier to removing the last pieces of paper from their organizations.

FIS Content Management is a series of modules that are built on the ImageCentre application. ImageCentre is an industry leader in the item processing space serving hundreds of clients. By leveraging this technology and the various modules of ImageCentre and FCM, institutions can access check images, statements, notices, documents and reports from one consolidated database. This streamlined approach to archive management provides the opportunity for organizations to have a single-entry point to content. Its scalability provides a solution that can service both small institutions and multi-billion-dollar operations alike.

FIS Content Management Key Benefits

- FIS Core Integration
- Single Archive Consolidated Content
- Business Process Automation Tools
- eSignature Capabilities

Components of the suite

FCM Document Imaging

Document Indexing

FCM supports a variety of methods by which documents can get indexed into the system. Through the use of barcodes or Optical Character Recognition (OCR), FCM can read information off of documents to quickly and efficiently index them. In addition, index files with associated images can be scheduled to import at varying intervals.

Document Audit

FCM supports the ability to export documents out of the system in various formats to support your audit needs. Either in a bookmarked PDF, native file format with a viewer or in the FDIC export file layout, FCM gives you the ability to organize data easily to address subpoena requests, audit requirements or customer-initiated items.

Document Retention

Manage the various regulatory requirements for document storage through FCM's Document Retention module. With this tool your institution can set the appropriate parameters and allow the system to monitor these settings and purge the documents at the requested time, ensuring compliance is met and documents are not stored longer than they need to be.

Document Tracking

FCM offers a robust exception tracking module which regularly polls the system looking for missing, expired and expiring documents. A user can be notified of these results through an online query, scheduled report or an account appearing in a queue as part of a workflow process.

Virtual Print Driver

Print2Archive gives the user the flexibility to index or batch a document through the use of a virtual print driver. With P2A, non-traditional content, such as a webpage, can also be sent to the archive allowing for greater flexibility with your document storage.

Document Research

FCM offers a robust research tool that allows a user to organize content in a way that is relevant to the role they perform in the organization. Full page OCR technology allows for searching of text across images stored in the archive to minimize search results and locate documents with specific information. Additionally, entitled users can edit, add notes, annotate and export documents as needed.

eSignature with a Topaz

Capture an electronic signature with an in-branch customer through the use of a Topaz device. The signature gets applied to the electronic form and can be archived for research and kick off workflow processes without having to print a physical piece of paper.

Email Import

Through a scheduled task polling an Inbox, emails can be set up to automatically index an email, as well as any attachment that may be associated using data from the body of the email. Additionally, the system can create a batch for these documents for any that do not include relevant metadata to auto-index and be made available to a user for review.

Outlook Plug-In

FCM offers an Outlook Add-In that allows a user to index the documents attached through the email by entering the metadata from the add-in. This data can then be sent to an Inbox which is polled to automatically archive those documents into FCM.

Document Reports

Automatically schedule reports or run ad hoc report data with varying output formats which incorporates numerous functions within the application from operator statistics to exception tracking.

API Integration

Through the use of a web services API, document images can be viewed from other applications that are leveraging this API to access FCM. Additionally, the API affords the ability for a user to push a document into FCM for archival via this service.

Report Archive module: COLD+

FCM COLD+ is a robust archive for reports from the core and ancillary systems. COLD+ is integrated into ImageCentre and can also run as a stand-alone application utilizing the Oracle database structure.

COLD+ meets complex challenges facing every financial institution by managing tremendous amounts of diverse electronic information and distributing that information enterprise wide to a myriad of different users.

Report Storage

COLD+ is a storage module for report content in various formats such as text, PDF and Excel. Data can be easily searched based on text searches, report types, date ranges, etc. to quickly and easily find relevant data within a broad range of information.

Data Mining

With advanced report extract capabilities, logic can be defined to monitor for reports to be archived and then parse through the data and automatically create a list of items that meet the predetermined criteria. Users can subscribe to these extracts and receive them via email once they are available.

eStatements

FCM offers a robust archival module which allows for various types of statement and notice information, including deposits, loans, tax retirement and wealth. These statements and notices are available for users to perform high speed back office retrieval for research purposes. Additionally, FCM offers a service to make these available through Internet banking delivery channels for end client presentation so clients have access to their information 24/7.

Business Process Automation

Many skilled employees spend a portion of their time completing routine tasks and back-office processes, when the focus should be on their customers and creative problem solving. We are forced to look at work differently in the technical era. The power of FIS' business process automation (BPA) Workflow solution will create higher productivity and consistency across an institution. The unique architecture of our solution allows our clients to streamline and optimize business

processes by specifying which functions can be automated and eliminating repetitive and mundane tasks. Think of FIS' BPA Workflow solution as a tool in your automation toolbox.

COLD Workflow

Business process automation that is driven off data extracted from a report. Rules are defined which can route information to various users responsible for monitoring this data stored in COLD+ and pushing into a workflow. This allows logic conditions to be built around the handling of these items, as well as an audit trail surrounding the decisions made.

Document Workflow

Similar to COLD workflow, with the difference being these business processes are initiated once a document has been indexed into the archive. This could be as a result of a paper document being manually indexed, electronic documents from various sources or an eForm. Once ingested, workflows can be triggered which can include a combination of SLA, escalation processes, OCR reading of the documents, conditional logic requirements and numerous other workflow variables.

Exception Tracking Workflow

Document exceptions, such as missing and expired, can be automatically sent to a user queue to be worked and validated by the appropriate parties responsible for the collection and management of these items.

SmartSign by eOriginal Integration

With SmartSign capabilities offered by eOriginal, clients can incorporate outgoing electronic signature automatically from within a workflow process. In addition, an invitation can be sent to a customer allowing them to securely upload missing and expired documents which will be automatically indexed and return into the workflow process for validation.

Contact Us

To learn more, please contact us at 800.822.6758 or visit us at fisglobal.com.