

Productivity Suite for Nautilus®

Staying competitive through automation and operational efficiency.

Customer satisfaction and retention are critical to the health of every financial services institution. Today's highly competitive market requires successful organizations to optimize operational efficiency by expediting and automating customer and internal transactions. The Productivity Suite provides automation of capture processes, indexing and archiving and streamlines administration and reporting functions – providing your organization the tools to stay competitive.

Productivity Suite consists of several key components:

Host Synchronization

Maintaining the consistency of customer information with other relevant data (e.g. index values, keywords) is critical. Host Synchronization enables you to quickly and efficiently synchronize host index data (e.g. CIF number, Tax ID number, loan number, customer name) with the keyword values stored in your Nautilus system. This process facilitates automated indexing of documents, reducing or eliminating the need to re-key information into Nautilus. When data changes on the host, Host Synchronization ensures that the change is automatically propagated to the Nautilus system.

Deposit Synchronization

Maintain the consistency of customer and account status information (e.g. employee accounts, closed accounts, dormant accounts, new signatures, and name changes) between the host system and the signature cards stored in Nautilus. Deposit Synchronization ensures that the status of all accounts requiring a signature card match the account status indicated by the host system. The system produces an exception report that lists account numbers from the host that do not have a

Save Time and Reduce Expense.

signature card or other deposit document stored in Nautilus. It also provides the ability to locate unassociated and/or missing signature cards, listing signature cards indexed incorrectly due to an indication of 'No Account Match found' on the host system. Synchronizing Nautilus and the host system automates the indexing of documents – eliminating the need to key or re-key information.

INFO-INDEX

Further streamline the indexing process by enabling users to create barcode index

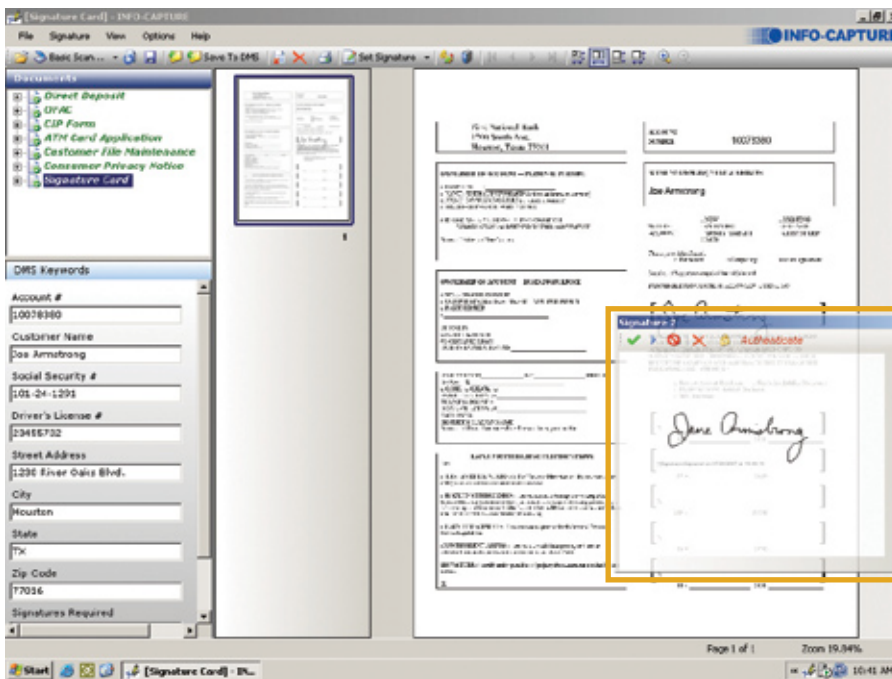
cover sheets using INFO-INDEX. This application dynamically pulls index data from the Nautilus system. Once printed, barcode sheets are placed in front of each document and routed for scanning. Used in conjunction with the **INFO-TRANSFER** module, the process can additionally be streamlined by automatically routing, queuing and archiving documents scanned using multi-function peripheral (MFP) devices and network scanners located anywhere in the organization's network.

INFO-INDEX is most effective when used with Host Synchronization to download index data from the host system into Nautilus. This approach provides the most accurate method to insert keyword index data into the Nautilus database, while also cataloging documents into the correct document type. Mistakes are minimized by eliminating the keying of index data.

INFO-CAPTURE

Accelerate traditionally time consuming and tedious activities such as new account openings, loan applications and change of address by using INFO-CAPTURE. Teller receipt printing, ink signing, and paper storage of these critical client documents are totally eliminated. INFO-CAPTURE electronically captures signatures,

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Each document is presented on the screen of the computer to the customer for signature. Using a Topaz signature pad, the customer's signature is placed in the location required for the presented document automatically.

fingerprints, paper documents and digital pictures to automate processes at the point of presentment and allows for easy archival and retrieval through the Nautilus Enterprise Content Management (ECM) system.

Streamlines the Signature Process

Financial institutions are required to properly document transactions requiring customer signatures. However, with the adoption of E-Sign and UETA legislation, electronic signatures have become acceptable legal alternatives to traditional ink signatures. INFO-CAPTURE provides an electronic signature solution that enables customer signatures to be captured in digital format for use on multiple document types.

INFO-CAPTURE works in conjunction with cost-effective signature pad hardware and has an intuitive interface that provides users the ability to capture images, attach signatures, print and archive documents. The system automatically converts electronic signatures into TIFF images for placement on documents created in any Microsoft Windows application. A semi-transparent signature box provides superior click-and-

drag functionality, enabling users to easily place signatures, as well as initials and dates, onto loan documents, signature cards and change of address forms. Forms can be configured to automatically bring the signer to the exact spot that signatures, initials, check marks, etc. are required.

Encrypts Data to Ensure Validity

INFO-CAPTURE further aids in customer verification through fingerprint capture and photo ID scanning. In addition to signature pads, INFO-CAPTURE works with desktop scanning devices to create a systematic process for capturing all required images, data and signatures. Once in the system, electronically signed documents are encrypted with advanced software controls to provide maximum security. If the document image and/or signature are altered following encryption, INFO-CAPTURE enables users to invalidate the entire document.

Improves Productivity via Automatic Indexing

By integrating the signature process with document scanning, INFO-CAPTURE

provides your organization with significant gains in productivity. INFO-CAPTURE facilitates the scanning process by recognizing barcodes and parsing the text of the print stream to populate index values into a cumulative list, enabling recurring documents to be automatically indexed during the capture process. Indexing is further automated via preset document types that ensure user consistency and ease of document indexing for storage and retrieval purposes.

INFO-REPORTS

Track the effectiveness of your Nautilus system to ensure optimization. INFO-REPORTS delivers statistical information in a report format about the productivity of scanning and indexing operations, as well as administrative and security data, such as user log-ins and license usage reports. Report categories include: license reports, indexing reports, user reports, scan reports, and reports for Nautilus Workflow-driven exception tracking application. »»