Resource Guide

fiserv.

Nautilus®
Enterprise Content Management

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Contents

Nautilus® from Fiserv is a fully integrated, enterprise content management software suite specifically designed to meet the unique needs of financial institutions across the globe. The solution combines capabilities such as electronic document management, document-centric process automation, document imaging, check image statements, workflow, computer output to laser disk/enterprise report management (COLD ERM), email archiving and records management into a single, easy-to-use, integrated system.

Nautilus reduces operating costs for your organization by streamlining document-related business processes. It also improves document integrity and quality while maintaining governance and compliance, and reducing risk.

Capture Your Documents and Data to One System

Nautilus Advanced Document Import Processor

Nautilus Advanced Document Import Processor empowers customers to quickly and easily archive large numbers of files and their related indices. Designed for document and image archiving generated by third-party applications, Nautilus Advanced Document Import Processor is ideal for performing back-file conversions of any size from legacy systems.

Nautilus Intelligent Classification

Intelligent Classification evaluates batched images and PDFs using OCR technology to automatically separate and classify documents, assigning the appropriate Nautilus document type. It provides a powerful processing engine that learns from existing documents, assessing both content and layout, without needing to create any templates. The processing engine is "trained" by using documents in Nautilus, or selected documents outside of Nautilus, minimizing configuration. Once this "training" is complete, you can start processing documents right away.

Nautilus Intelligent Capture for Accounts Payable

Intelligent Capture for Accounts Payable evaluates invoice images using optical character recognition (OCR) technology to automatically identify documents and extract the necessary data for faster, more cost-effective invoice processing. It provides a powerful processing engine that enables data extraction from widely varying document layouts without needing to create any templates. Because it uses vendor data you already have, it minimizes configuration time so you can start processing invoices right away. As documents are verified, it learns dynamically from any additions or corrections, providing even greater accuracy over time.

Nautilus AFP Data Input Filter

Nautilus AFP Data Input Filter works in conjunction with Nautilus COLD/ERM to process and store advanced function printing (AFP) data streams, enabling stored documents to retain original formatting features. Due to the variety of data streams, Fiserv will verify that the AFP stream can be processed before you acquire Nautilus AFP Data Input Filter.

Nautilus PCL Data Input Filter

Nautilus PCL Data Input Filter processes documents generated by Hewlett-Packard line-of-business systems that utilize Printer Control Language (PCL). Nautilus PCL Data Input Filter extends the capabilities of Nautilus COLD/ERM by working directly with PCL files while maintaining common document formatting such as graphics, bolding and underlining. PCL documents can be viewed or printed in their native format or with image overlays. Additionally, they can be text searched and can be configured for cross-referencing – a powerful feature within Nautilus, tying together related pieces of information for easy retrieval.

PCL documents are available to users through the Document Retrieval Dialog. While viewing a PCL document, you can perform a text search, add annotation, create redactions and add highlights. Documents can be emailed or faxed from within the system without having to print the document on preprinted statement letterhead. Due to the variety of data streams, Fiserv will verify that the PCL stream can be processed prior to your acquisition of Nautilus PCL Data Input Filter.

Nautilus PDF Data Input Filter

Nautilus PDF Data Input Filter works in conjunction with Nautilus COLD ERM to process, index and store PDF documents, allowing for the extraction of index data from the PDF stored documents. Due to the variety of PDF formats, Fiserv must verify that the PDF document can be properly processed prior to acquiring Nautilus PDF Data Input Filter. No assumptions are made without diagnostic validation.

Nautilus COLD ERM

Nautilus COLD ERM manages the storage of reports, statements and invoices – virtually any document that originates as host-generated data. By storing information on inexpensive electronic media, Nautilus COLD ERM reduces or eliminates the need to store reports on paper, microfilm or microfiche.

Nautilus COLD ERM saves money by reducing printing and storage costs and increases productivity by streamlining filing and retrieval. These features alone make COLD one of the easiest technologies to cost-justify. Nautilus COLD ERM identifies, compresses, and indexes reports and statements output from computer systems as print, COM or text files.

Nautilus Directory Sweep

Nautilus Directory Sweep allows you to efficiently archive and automatically index documents as they are found in specified directory locations. The process uses file naming conventions to assign a primary keyword value for the associated document type. Documents are ingested directly into archive without delay for manual indexing. Text files may be used to automate and standardize data entry using auto-fill keyword sets from an associated text file.

Nautilus Document Import Processor

Nautilus Document Import Processor empowers customers to quickly and easily archive large numbers of files and related indices. Designed for document and image archiving generated by third-party applications, Nautilus Document Import Processor is ideal for performing large back-file conversions from legacy systems.

Nautilus Batch Automated Indexing

Automatically classify and index scanned image or PDF documents. Nautilus Batch Automated Indexing supports multiple languages and the processing of bitonal, grayscale and color images. Nautilus Batch Automated Indexing enables batch processing and ad hoc automated indexing from a selection list. It compares documents with predefined templates that define the areas of the document that are to be processed. Once a document is matched to a template, it is processed and the extracted indexing values are assigned.

Nautilus Integration for Kofax® Capture

Nautilus Integration for Kofax Capture provides data capture, document capture and Internet-based front-end capture. Nautilus archives image objects supplied by Kofax Capture within the specified document types assigned to each document class.

Nautilus Integration for ReadSoft® Documents

Nautilus Integration for ReadSoft Documents provides the ability to archive selected batches of forms and invoices generated by ReadSoft Documents, while allowing retrieval of previously archived documents. Nautilus Full Text Indexing Server for Microsoft® provides advanced searches for words or phrases that exist within documents stored in Nautilus. This powerful research tool integrates with the Nautilus security module ensuring that only users with appropriate privileges access the full-text catalogs.

Searches are conducted for words or phrases that may exist in COLD documents or text renditions of image documents (OCR images) as well as certain third-party application documents, such as Microsoft Word and Adobe® PDF. When documents are processed into Nautilus they are sent to the Microsoft Index Server, which performs the full-text function and stores the full-text renditions of these documents in Index Server Catalogs. The Microsoft Index Server Catalogs are repositories that can be configured to store full-text information, usually grouped by a common theme. Even though the full-text renditions of documents are stored in the Index Server Catalogs, users search for words or phrases from the Nautilus client interface. These searches are significantly faster than regular text searches and allow users to quickly find the occurrence of a particular word within a vast set of documents.

Nautilus Mailbox Importer

Nautilus Mailbox Importer empowers you to capture and manage inbound Internet email within the enterprise. The system supports incoming mail and attachments from email systems compliant with Messaging Application Programming Interface

(MAPI) such as Microsoft Exchange. Nautilus Mailbox Importer automatically indexes and stores emails and attachments as documents.

Nautilus Mailbox Importer captures email messages and attachments based upon characteristics such as sender, recipient, "cc," "bcc," subject, date, message ID, return path and attachment count. Its message log allows real-time monitoring of messages being archived into Nautilus. The log shows the number of messages archived, the number of attachments and the errors encountered during the current run.

Integrating seamlessly with the Nautilus workflow, Nautilus Mailbox Importer allows electronic document routing and the streamlining of business operations, and ensures that documents are routed in a standard, controlled and prompt manner.

Nautilus XML Index Document Import Processor

Nautilus XML Index Document Import Processor uses an XML index file to import, classify and index high volumes of documents, regardless of electronic file types. Nautilus XML Index Document Import Processor is typically used to process output from external scanning services, third-party capture systems and as part of software application conversions.

Powerful configuration and flexible scheduling options allow the Nautilus XML Index Document Import Processor to import from any XML formatted index file and perform attended processing during off-peak hours.

Nautilus XML Tag Import Processor

Nautilus XML Tag Import Processor processes, indexes and stores XML format files.

Nautilus Barcode Generator

Nautilus Barcode Generator generates 3-of-9 barcode sheets from manual keyword entry in standalone mode or from keyword and document type information scraped from the line-of-business application screen. In standalone mode, the Nautilus Barcode Generator allows you to select a document type and trigger the printing of a 3-of-9 barcode sheet with encoded document types and keywords. Note: This functionality is included with Nautilus Application Enabler.

Nautilus Barcode Recognition Server

Nautilus Barcode Recognition Server enables a single workstation to perform barcode processing on image batches scanned at multiple scanning workstations.

Nautilus Batch OCR

Nautilus Batch OCR converts images to text, facilitating text searching and/or full-text indexing. It supports multiple languages, processing of bitonal, grayscale and color images, and the creation of multiple output formats, such as ASCII text, PDF, HTML or Microsoft Word. Nautilus Batch OCR enables batch processing and ad hoc document OCR from a selection list.

Nautilus Disconnected Scanning

Nautilus Disconnected Scanning works in conjunction with Nautilus Web Server to provide users with a robust document capture solution that can be used while disconnected from Nautilus. It affords configurable options for continuous background uploads as well as scheduling of batch execution, autofill keyset download, dataset download and support of ad hoc, on-demand priority processing.

Nautilus Express Scanning

Nautilus Express Scanning simplifies the task of document scanning for any department. All options, scanner settings and default index values are
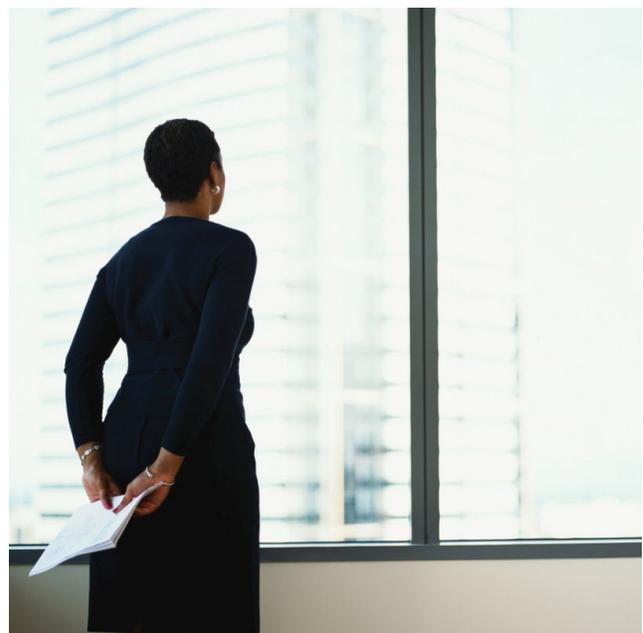
predesignated. Scanners compatible with TWAIN, ISIS or Kofax, as well as sweep functionality, are supported. Documents are imported or sent to a scan queue for further processing.

Nautilus Front Office Scanning

Nautilus Front Office Scanning allows distributed scanning from non-Nautilus workstations and a departmental scanning console station. Scanned files and indexing data are uploaded across the web when a connection is available to Nautilus Web Server.

Nautilus Image Segment Archiver

Nautilus Image Segment Archiver divides an image in a scan queue into multiple documents. You can select sections of the image and archive each selected section as a separate document.

Nautilus Integration for eCopy™ ShareScan® OP

Nautilus Integration for eCopy ShareScan OP enables an organization to use a choice of supported eCopy networked scanners or digital copiers to capture document images from eCopy ShareScan OP and then route them directly into the Nautilus archive. (Contact eCopy for the most current list of supported devices.)

Nautilus Integration for Sharp® MFP

Nautilus Integration for Sharp MFP enables an organization to use a choice of supported Sharp MFP devices to capture document images and route them directly into the Nautilus archive. (Contact Sharp for the most current list of supported devices.)

Nautilus QuickCapture™

Nautilus QuickCapture enables individuals within your enterprise to use compact desktop check transport devices to quickly and easily capture small to medium volumes of check items at the back office or branch level, perform data corrections on the captured items and upload them into Nautilus as Microfilm Replacement and/or Check 21 enabled branch-captured items.

Nautilus Virtual Print Driver

Nautilus Virtual Print Driver enables printable documents to be stored in Nautilus without scanning. Nautilus is set up as a printer in your word processing, spreadsheet, drawing or other applications not compliant with open document management API (ODMA).

Simply select Nautilus as the printer from these other applications; an import dialogue box is presented and the necessary index values are entered. Nautilus then ingests the document or file into the archive. When signature pads are used in conjunction with Nautilus Virtual Print Driver, electronic signatures are captured and applied directly to forms already acquired inside the Nautilus archive.

Nautilus Advanced Check Image Import

Nautilus Advanced Check Image Import provides an interface for importing checks and other bank slip documents captured via image-enabled (reader/sorter) transports into Nautilus. The Nautilus client easily retrieves these images by keyword data available in the magnetic ink character recognition (MICR) line. Check and other associated archive documents may be retrieved from a single user request by using cross-references.

Nautilus Advanced Check Image Import stores checks and other item processing documents. During import, Nautilus ingests various file formats from image item processing systems and services. It allows "point and click" access to single or multiple check images, based on the initiated query. Check images that have been created by third-party check image capture software can be imported. This specialized process is primarily used for research and statement preparation.

Nautilus Quick Manager

Nautilus Quick Manager is an upgrade for Nautilus QuickCapture that efficiently manages image-based transaction files ready to be processed. It includes a manager console, reporting package, query tools and related support functionality.

Nautilus Ad-Hoc Scanning Named User for Microsoft® SharePoint®

Nautilus Ad-Hoc Scanning Named User for Microsoft SharePoint enables the use of the Nautilus Ad-Hoc Scanning Server for Microsoft SharePoint.

Nautilus Ad Hoc Scanning Server for Microsoft® SharePoint®

Nautilus Ad Hoc Scanning Server for Microsoft SharePoint enables users to scan document images directly through Microsoft SharePoint as item list attachments and document library items. Documents are indexed, managed and stored in Nautilus, while still linked and accessible from the related items and records managed by users in SharePoint.

Nautilus Application Enabler

Nautilus Application Enabler offers a revolutionary approach to image enabling. It provides a seamless integration between your core business applications and the Nautilus system—all without programming.

Nautilus Application Enabler improves employee efficiency because it allows users to retrieve supporting documents, including images, application files and text reports, by simply clicking on a specified field within any Windows-based program. Additionally, multiple departments can share information regardless of their respective core applications, thus maximizing the organization's investment in separate line-of-business applications.

Nautilus Archive Services for Microsoft® SharePoint®

Nautilus Archive Services for Microsoft SharePoint allows users to archive documents from Microsoft SharePoint document libraries into Nautilus. Archival may be completed on an ad hoc basis, event driven or scheduled based upon predefined rules, as appropriate.

Nautilus Integration for AutoStore™

Nautilus Integration for AutoStore allows an organization to use networked multifunction peripherals (MFPs) or a digital copier to capture document images and route them directly to Nautilus. This component allows users to select the type of document and assign keywords without extensive system training.

Nautilus Integration for Biscom FAXCOM®

Nautilus Integration for Biscom FAXCOM allows customers who have a Biscom FAXCOM enterprise fax system to automatically archive received faxes into Nautilus. This is accomplished by a Microsoft Windows service that communicates with the fax server and Nautilus (through the Nautilus Application Server).

Nautilus Integration for Esker® Fax

Nautilus Integration for Esker Fax allows customers who have an Esker Fax enterprise fax system to automatically archive received faxes into Nautilus. This is accomplished by a Microsoft Windows service communicating with the fax server and Nautilus.

Nautilus Integration for IBM® Lotus Notes®

Nautilus Integration for IBM Lotus Notes archives individual email messages and attachments in Nautilus from within the Lotus Notes client. Using a Lotus Notes Shared Action, the user can import messages and attachments into Nautilus via an import dialog.

Nautilus Integration for Microsoft® Outlook®

Nautilus Integration for Microsoft Outlook supports Outlook 2007, 2010, 2013 and 2016. It allows a Microsoft Outlook user to interact with Nautilus through their familiar email client. Users can save emails and/or any associated attachments by simply dragging the email to the Nautilus folder. Users can also retrieve documents from the interface. In version 16, Nautilus Outlook support is enhanced with added document knowledge transfer and compliance. It also provides new options for importing attachments.

Nautilus Integration for OpenText® Server RightFax

Nautilus Integration for OpenText Server RightFax provides the ability to specify how fax documents are configured for automatic import into Nautilus upon receipt at the RightFax Server.

Nautilus Integration for SoftLinx ReplixFax

Nautilus Integration for SoftLinx ReplixFax allows customers who have a SoftLinx ReplixFax enterprise fax system to automatically archive received faxes into Nautilus. This is accomplished by a Microsoft Windows service that communicates with the fax server and Nautilus (through the Nautilus Application Server).

Nautilus Office Business Application

Nautilus Office Business Application supports Office 2010, 2013 and 2016. It allows users of Word, Excel, and PowerPoint to interact with Nautilus content through their familiar Microsoft Office interface. This integration provides users with single-click menu access for storing, retrieving, and editing Nautilus documents and related content.

Nautilus Automated Redaction

Nautilus Automated Redaction utilizes OCR character and pattern analysis or configured templates to evaluate document contents for information or areas on the document that need to be obscured and made unreadable. Documents are placed for review before being permanently redacted so that private or confidential information cannot be viewed on the image documents.
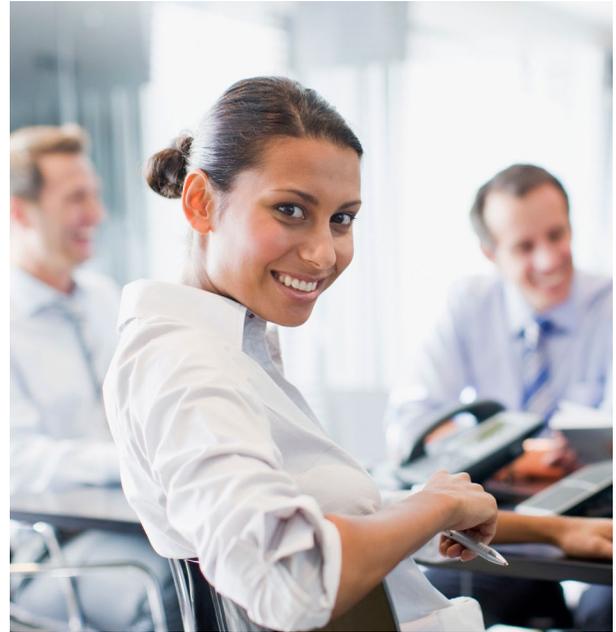
Revolutionize Your Processes

Nautilus Electronic Document Management Services

Nautilus Electronic Document Management Services provides for the storage and management of word processing documents, spreadsheets, presentations, forms and images. It also manages document revisions and versions so that complete audit tracking can be provided for documents that change or must be rendered in another format. Documents generated by ODMA-compliant applications are stored in Nautilus. Other features include ad hoc document storage, revision control, commenting and check-in/check-out.

Nautilus Document Composition for Microsoft Word

Document Composition for Microsoft Word aggregates information from multiple sources and automates creation of Microsoft Word documents using standard templates. The created document includes merged data form templates, eForms, Workflow properties, services, database queries and nested subtemplates.

Nautilus Physical Records Management

Nautilus Physical Records Management is a low-impact solution for managing non-electronic information resources. It enables organizations to use Nautilus as a single interface to manage the tracking, locating and access of physical records. Organizations can define repositories for records that reflect their storage model. Physical records are indexed using keywords for standardized Nautilus search and retrieval. Usage and administration functions such as physical record requests and check-in/check-out activities are managed through the Nautilus client.

Nautilus Records Management

Nautilus Records Management manages the retention, disposition and destruction of record folders according to an organization's business rules, based upon the occurrence of an event in accordance with external regulations or compliance laws. The package includes document retention functionality and offers the flexibility of automatic destruction and disposition.

Nautilus Advanced Document Import Processor

Nautilus Advanced Document Import Processor empowers customers to quickly and easily archive large numbers of files and their related indices. Designed for document and image archiving generated by third-party applications, Nautilus Advanced Document Import Processor is ideal for performing back-file conversions of any size from legacy systems.

Nautilus Advanced Remittance Processor

Nautilus Advanced Remittance Processor provides the ability to identify and store remittance information (such as check images, remittance slips and financial information) from a remittance text file. It maximizes processing speeds using multithreaded technology along with specific hardware requirements.

Nautilus Digital Signature

Nautilus Digital Signature provides digital signature approval functionality and the standard Approve IT˚ desktop license.

Nautilus eDocument Distribution

Nautilus eDocument Distribution maximizes the capabilities of Nautilus Image Statements by managing the electronic delivery process. With Nautilus eDocument Distribution, documents are delivered directly to the intended recipients, eliminating the need for paper, printing and postage costs. Based on a recipient's profile, Nautilus can distribute the statements in TIFF, RTF or PDF format for emails and web postings. The system also provides the option of attaching a customized cover letter, email message or promotional document to a statement.

Nautilus Enterprise eDocument Distribution

Nautilus Enterprise eDocument Distribution provides for an unlimited volume of transmissions using eDocument distribution to maximize the capabilities of the Nautilus Image Statements electronic delivery process.

Nautilus Image Statements

Nautilus Image Statements provides image statement rendering by matching primary documents to supporting documents for printing. Nautilus provides options including primary and secondary document setup, selectable print and font formats, auto-naming and range selection. Supporting documents may be printed multiple to a page, thereby reducing paper use.

The customer format file (CFF) enables Nautilus to switch start formats as you work, allowing a business to provide different levels of documentation on a per customer basis. Other features that increase flexibility and ease of use include print restart capability, integration with host–generated image statements, and host match information printed under each check image.

Nautilus Image Statements results in better management of support documents from statements distributed to customers, reduced costs of forwarding relevant materials with a customer statement, increased statement accuracy through process automation, improved customer satisfaction and improved employee productivity. Multiple images of secondary documents can be printed to a single page. The number of images per page can also be selected by account.

Generally, a customer statement serves as the primary document and check images are the secondary documents. A more generic application would be a billing statement as the primary document and signed customer receipts as the secondary document.

Nautilus Print Distribution

Nautilus Print Distribution facilitates and streamlines scheduling, distribution and printing of information that is performed on a regular basis. Nautilus Print Distribution enables users to schedule print services from a central processing site, across a WAN, and designated remote locations.

Printer services are defined through a combination of print distribution groups and document keywords. Customizable and flexible, Nautilus Print Distribution supports different document types and, if desired, will manage a different print format for each document and also provides the ability to print copies of documents from one or more of the document types in a group.

Nautilus BPMN Modeler

Nautilus BPMN Modeler allows technical and/or business analysts to model business processes, end

to end, including all interactions with humans, systems and content. It utilizes the Business Process Model and Notation (BPMN) standard. It also provides output of process documentation and generates XML according to the Business Process Execution Language (BPEL) standard, which can be exported and executed by a BPEL orchestration engine.

Nautilus Business Rules Engine

Nautilus Business Rules Engine complements workflow, allowing you to quickly and easily modify business logic in workflows through a client interface. It adds advanced capabilities to simplify the development and maintenance of sophisticated workflows. Two new tiers of privileges give administrators more control in assigning access to workflow logic. It also includes built-in support for creating point-and-click configurable business rules, formulas, SQL calls and Web services calls without customization. The key benefits of the Nautilus Business Rules Engine are simplification, control and increased flexibility.

Nautilus eForms

Nautilus eForms provides users access to electronic HTML forms through a thin (browser-based) or Nautilus client interface. When completed and submitted, forms are automatically captured, indexed and stored as new documents, and they are available for future retrieval.

Nautilus Unity Forms

Nautilus Unity Forms enables users having limited technical experience to create useful and aesthetically appealing forms. Users having technical knowledge can create forms in a fraction of the time they would have previously spent. In version 16, Nautilus provides a new Unity Forms Designer tool with data prepopulation capability.

Nautilus Studio

Nautilus Studio is a graphical user interface designed to aid administrators in creating and managing new and existing workflow solutions, without the need for custom coding. It provides a point and click configuration and graphical workflow designer.

Nautilus Workflow Client

Nautilus Workflow Client provides workstation access to workflow functions in order to perform work and complete tasks on documents.

Nautilus WorkView

Nautilus WorkView enables the creation of custom applications to track issues from start through resolution. Nautilus documents and user-defined events can be attached to issues, as necessary. A configuration tool allows you to define custom database tables, screens and views. In version 16, Nautilus Studio allows you to more easily create process automation workflows and provides new workflow notifications.

Nautilus WorkView Integration for Microsoft® Outlook

Nautilus WorkView Integration for Microsoft Outlook supports Outlook 2007, 2010, 2013 and 2016. It enables you to view Nautilus WorkView data related to a selected email, execute Nautilus WorkView filters and perform full-text searches of Nautilus WorkView objects/data in order to gather additional context and information related to a message.

Content AutoApps™

Content AutoApps are off-the-shelf process automation solutions for Nautilus. Content AutoApps are typically smaller process automation applications that provide big impact within an organization. They automate repetitive manual tasks within an organization. They are specific to the needs of the financial services industry and require less discovery, fewer licenses and quicker deployment.

Content AutoApps Closed Accounts Signature Cards Re-Index

Content AutoApps Closed Accounts Signature Cards Re-Index provides the ability to search and reclassify (re-index) signature cards and photo IDs as a new document type in Nautilus.

For example, an institution may elect to process a description for "Closed Acct Sig Card" or "Closed Acct Photo ID". Content AutoApps Closed Accounts Signature Cards Re-Index updates the document with the closed account date provided. An electronic note can be attached to the newly reindexed document indicating when the account was closed and a keyword value of "closed" automatically applied as the status for the document. A "delay" period can be initiated to hold automatic searching for signature cards to be re-indexed, offering sufficient time for operations to exclude the document from being updated with a "Closed Acct" status.

In the event a closed account document needs to be re-indexed to active status, Nautilus eForms can be used to designate which users will be authorized to complete the form and automatically reclassify the document type to an active status. To comply with policy standards, document types may need to remain unchanged. In these cases, Content AutoApps Closed Accounts Signature Cards Re-Index can be configured to adjust only closed account status information as appropriate, such as Closed Date or Closed Account status. Content AutoApps Closed Accounts Signature Cards Re-Index works well with Nautilus Document Retention to provide an automated means to manage the update of document sets with a particular closed date. Nautilus Document Retention automatically purges the documents from the system once the documents have met retention requirements.

Content AutoApps Closed Loan File Document Update

Content AutoApps Closed Loan File Document Update updates a loan file with a loan closing date when a closed loan report is COLD processed. It works in conjunction with Nautilus COLD ERM and a Nautilus Workflow Client license. Content AutoApps Closed Loan File Document Update automatically re-indexes loan folders for particular document types to the status of "closed loan". It works well with Nautilus Document Retention to provide an automated method for managing the update of any large set of documents with a closed date. Nautilus Document Retention automatically purges documents once they meet retention requirements.

Content AutoApps Document Expiration Alerts

Content AutoApps Document Expiration Alerts provides users with a report and/or email notification when a specific document and/or set of documents is going to expire within a defined period of time. These reports are made up of four sections: documents that have been flagged to expire within 30, 60 and 90 days, as well as documents that have already expired. By automating expiration reminders, you eliminate a manual process, ensure greater compliance and assume less risk of documents being overlooked or forgotten.

Content AutoApps Document Expiration Alerts enables users to set up documents that need to be updated within a specified timeframe. Update timeframes can be set at the individual document level or by document type. In the case of document type classification, the expiration of a document would be based on the anniversary date of the document being originally ingested.

Content AutoApps eDoc Distribution Customer Profile Configuration

Content AutoApps eDoc Distribution Customer Profile Configuration provides a mechanism to automate customer profile setup and validate email address information used for electronic statement delivery.

An Electronic Banking Application (EBA) form triggers the workflow execution. The form is typically prepared and signed by a customer who elects to receive electronic statements, and it may be imported into Nautilus via any of the routine ingestion methods, including document imaging, DIP and file import. The EBA may also be prepared via Nautilus eForms executed via branch or back-office using Nautilus through an institution's intranet or Internet channel. At a minimum, the EBA must contain a customer account number, customer name and an email address. Once the EBA has been ingested, it is submitted to a workflow life cycle. An email notification is sent to the customer to validate email address information.

Nautilus monitors the email for a response. If an inaccurate email address is found, a failure response is imported into Nautilus for proper handling. Content AutoApps eDoc Distribution Customer Profile Configuration moves the EBA to a customer service queue, where an email notification is sent to designated personnel with supporting detail regarding the event. The workflow queue allows any user with access the ability to repair and resubmit activity, enabling EBA documents to be sent to a customer for proper validation without delay.

Content AutoApps IRA Transaction Document Tracking

Content AutoApps IRA Transaction Document Tracking monitors whether a contribution or disbursement form for an IRA account has been captured and stored in

Nautilus, ensuring your institution is meeting regulatory requirements to track and maintain documentation supporting a transaction. Timers track missing documents in a specific account. When missing documents are identified, summary reports are created at customer-defined time intervals. A maximum of five intervals may be configured.

Content AutoApps IT Security Request Management

Content AutoApps IT Security Request Management automatically routes IT security management forms through multiple levels of approvals within an organization. It also supports routing through as many as four distinct IT security groups and more efficiently manages IT system security processes in the areas of new employee setup, employee separation and employee add/change service requests.

Each activity is processed in the same manner, initiated by the completion of Nautilus eForms and identifying access rights to applications for specific employees. The form is automatically routed to appropriate managers, with up to four levels of approval. Then the form is sent to the IT security group for action. The employee separation process allows the requestor to choose a scheduled separation or immediate separation. If the separation is scheduled, a reminder can be sent to the IT security group on the employee's last day of employment. If the separation is immediate, then the IT security group is notified immediately in order to remove access from the appropriate applications.

Content AutoApps New Account or Member Number Update

Updating a large document set with a new account number or member number typically requires a cumbersome manual process. If any update is overlooked, outdated index information makes document access difficult. Content AutoApps New Account or Member Number Update provides a keyword update to change the existing details in an account number/member number keyword field.

Content AutoApps New Account or Member Number Update is initiated through Nautilus eForms or a link on your institution's intranet site.

Once the eForm is submitted by a user, it is routed to a workflow life cycle. The account number or member number entered in the existing keyword text field will be used to find all member documents that are configured for lookup within Nautilus. This keyword value will be moved to a "Previous" or "Old" account number/member number keyword field. The new account number/member number keyword entered on the eForm will be copied to the keyword field for each member document found in Nautilus. Upon completion of the updates, an email notification will be sent to the user submitting the change form. Content AutoApps New Account or Member Number Update is designed to be used by personnel who have managerial or operational authority to make mass keyword changes within Nautilus.

Content AutoApps New Accounts Document Tracking 10 Document Types

Content AutoApps New Accounts Document Tracking 10 Document Types provides you with the ability to track up to as many as 10 different document types in Nautilus to support the new account opening process. Document types can be tracked based upon the type of account being opened. Up to three account types may be used, such as a demand deposit account (DDA), savings and time deposit. Missing documents are summarized on either a single branch or consolidated summary report.

A summary report is created each time the tracking process executes. This summary includes new accounts that are missing new account documents. It will be archived into Nautilus and emailed to a predefined set of recipients. The report contains, at a minimum:

- The number of days the new account documents are outstanding

- The account/member number

- Branch number

The summary report may also include the customer name and officer/FSR number if these values exist on the new accounts report being COLD processed. A "delay" period can be put in place to wait a designated number of days before the process begins looking for new account documents, offering more time for operations to route documents to the scanning department for ingestion.

Automated reminders will also be sent to each branch providing a summary of accounts that are still missing documents after a certain number of days.

Content AutoApps New Accounts Document Tracking Photo IDs

Content AutoApps New Accounts Document Tracking Photo IDs tracks whether a photo ID has been imported into Nautilus for DDA, savings or time deposit account types. A summary report for each branch is created upon execution of the workflow tracking process, identifying new branch accounts that are missing photo IDs.

The summary report will be archived and emailed to designated recipient(s) at each branch. Reported information includes:

- Number of days that photo IDs are outstanding

- Account/member number

- Branch number

- Customer name

- Officer/financial services representative (FSR) number (if these values exist on the new accounts report being COLD processed)

A "delay" period can be initiated to withhold automatic searching for active photo IDs, allowing operations sufficient time to route a photo ID to the scanning department for ingestion. Automated reminders that provide a summary of accounts missing photo IDs are sent to a branch after a predetermined number of days (typically 10, 20 or 30 days).

Content AutoApps New Accounts Document Tracking Signature Cards

Content AutoApps New Accounts Document Tracking Signature Cards monitors whether a signature card

has been imported into Nautilus for DDA, savings or time deposit account types. A summary report is created when the workflow tracking process executes, identifying new branch accounts that are missing signature cards. The summary report is archived into Nautilus and emailed to designated recipient(s) at each branch. Reported information includes:

- Number of days signature cards are outstanding

- Account/member number

- Branch number

- Customer name

- Officer/FSR number (if these values exist on the new accounts report being COLD processed)

A "delay" period can be initiated to withhold automatic searching for active signature cards, allowing operations sufficient time to route a signature card to the scanning department for ingestion. Automated reminders that provide a summary of accounts still missing signature cards are sent to each branch after a predefined number of days.

Content AutoApps Reg CC Hold Tracking

Content AutoApps Reg CC Hold Tracking is a paperless workflow process to route documents and ensure documentation exists to support depository transactions placed on hold as a Reg CC item.

Multiple departments in your institution will benefit from using Content AutoApps Reg CC Hold Tracking. A user submitting the form to indicate that a Reg CC hold has been flagged will no longer need to print a copy of the form for routing to and review by the centralized operations center.

Other back-office departments supporting Reg CC compliance will be able to work electronically, accessing all supporting documents in a Nautilus workflow. Deposit operations can work within a Nautilus workflow life cycle to view Reg CC tracking documents. Clicking on a tracking document displays supporting documents that contain the same matching criteria as the Reg CC tracking document; for example, an account number and withhold amount. The supporting documents displayed would be the Notice of Delayed Availability form created by branch personnel.

Using cross-referencing functionality within Nautilus, the user will have the ability to double-click on the deposit amount within the eForm to retrieve the check image and related deposit. Deposit operations can then review all documentation together electronically, printing the check image and deposit ticket, then routing the documents to the scanning department for additional scanning.

Content AutoApps Reg D Account Tracking

Content AutoApps Reg D Account Tracking provides you with a summarized view of activity for money market and savings accounts that exceeds the number of transactions authorized for a given statement cycle period. This report uses information from your core banking Excessive Activity Report.

Warning letters can be printed for accounts that have exceeded their maximum number of transactions; however, this option should not be elected if notices produced by the core system are used.

Content AutoApps Stop Payments Document Tracking

Content AutoApps Stop Payments Document Tracking automatically notifies key branch personnel when a stop payment form has not been received. It is triggered by the daily stop payments report that is provided by your core system provider.

Three configurable, institution-defined checkpoints trigger alerts to designated recipients if a stop payment order form has not been received within the defined period. Once the form is received and ingested, Content AutoApps Stop Payments Document Tracking will remove the tracking document from the life cycle. If the form is not received within 14 days, a memo is attached to the tracking document indicating non-receipt and designated bank personnel are notified via email.

Content AutoApps Verification Report Exceptions Notification

Content AutoApps Verification Report Exceptions Notification notifies designated Nautilus administrators in the event that discrepancies are identified within a Nautilus SYS verification report.

Discrepancies occur as the text entries "Error," "Warning" and "Invalid," and they are available for appropriate follow-up. The report is automatically generated within Nautilus after a processing batch is successfully created from any ingestion methods, including COLD, document import processing, PCL or check image processing. Nautilus administrators can respond proactively to potential issues by identifying key processing errors before users or bank operations are impacted.

Nautilus Collaboration

Nautilus Collaboration provides a centralized solution for people to share documents, ideas and conversations within the secure native environment. With Nautilus Collaboration, users can share selected documents and WorkView and view multiple threaded conversation strings pertaining to those documents and objects. Nautilus Collaboration was built to overcome common communication, geographical and scheduling barriers. As a result, groups can collaborate on everyday business tasks such as issue resolutions, document reviews and special projects, making it ideal for organizations with mobile or remote workers.

Nautilus Document Knowledge Transfer

Nautilus Document Knowledge Transfer enables you to rapidly distribute documents to multiple workforces across the enterprise, ensuring that written materials critical to job roles, procedures and protocols are read and acknowledged by all impacted workers. Nautilus Document Knowledge Transfer provides a central platform on which to build compliance strategies targeted toward industry regulators and quality organizations such as ISO 9000.

Nautilus Full Text Indexing Server for Autonomy IDOL[®]

Nautilus Full Text Indexing Server for Autonomy IDOL extends native Nautilus search capabilities to both structured and unstructured data. Advanced searches can be performed based on both document keywords and words or phrases that exist within Nautilus documents to quickly and easily locate relevant content.

Nautilus Signature Pad Interface TWAIN

Nautilus Signature Pad Interface TWAIN supports the real-time signing of TIFF images and eForms within the Nautilus client. The original image is altered with the signature that is scratched on a Topaz signature pad device. Licensing is per site.

Commercial OnBoarding™ Enrollment

Commercial OnBoarding Enrollment saves clients time, money and effort while reducing customer attrition rates and preventing a poor onboarding experience for new commercial customers. More importantly, the automation of the product setup process can result in significant revenue growth by reducing delays in onset of revenue generation from new product implementations. The automation of the enrollment process can result in significant revenue growth and costs savings equaling millions of dollars a year.

This solution enables Fiserv clients to automate the commercial-customer enrollment process, replacing paper-based forms with e-forms for upfront customer profiling and product setup initiation. It contains a flexible workflow process between all personnel touchpoints: sales, operations, management and commercial customers. It also provides collaboration mechanisms and accessibility options to enable the various functional areas of the bank to perform their tasks quickly.

Centralized operator dashboards, delineated by functional area, offer increased process transparency. Commercial OnBoarding Enrollment also provides comprehensive reporting functionality that strengthens both process and compliance initiatives for your organization.

Nautilus Paperless Accounts Payable

Through the use of imaging and document-based process automation, Nautilus Paperless Accounts Payable can solve many of the problems encountered in a paper- based system. The solution streamlines what are typically manual and repetitive tasks into seamless operations. It provides automation to bulk processing of invoices via a configurable document-based workflow. This workflow is powered by easily accessible data made possible through the integration of Nautilus and Prologue™ from Fiserv. Once invoices and purchase orders are captured, accounts payable (AP) becomes paperless by using the electronic image of the documents throughout the entire AP life cycle.

An electronic, multilevel approval and exception processing automates the error-prone and time-consuming manual processes. By utilizing Nautilus Workflow and accessing data from Prologue and Nautilus, approvers can view the invoice image and approve with just a few mouse clicks. Through client- defined rules along with specific data values found on the invoice, a comprehensive, multilevel approval process is created. The automated approval work can be configured based on a client's individual needs. Examples are: by department, dollar amount, invoice type or any other characteristic.

Nautilus Mobile eForms

Developed for laptops and mobile devices, Nautilus Mobile eForms ties into your existing Nautilus workflow to enable your mobile workforce to complete business-critical forms while in the field. Loan officers can complete commercial loan paperwork at the client's location, and then upload all data directly into Nautilus upon returning to the office.

Nautilus Print Set Processor

Process files that contain print set records that are headers of information to identify a statement and provide keyword information. Nautilus Print Set Processor is required with Nautilus OMR Marks Generator.

Nautilus Digital Signing Server

Nautilus Digital Signing Server allows digital approval of documents via a single certificate-based signature.

Nautilus Check Image Statement

Nautilus Check Image Statement allows the rendering of image statements by matching primary documents to supporting documents for printing. Supporting documents such as checks may be printed as multiples on a page, minimizing paper usage. Nautilus Check Image Statement enables you to better manage supporting documents, reducing the cost of forwarding relevant materials with a customer statement, increasing statement accuracy through process automation, and improving customer satisfaction and employee productivity.

Nautilus Image Cash Letter Generator X9.37 – Export

Nautilus Image Cash Letter Generator X9.37 – Export enables financial institutions to generate both forward and return electronic image cash letters in the DSTU X9.37 file format from check image documents stored in Nautilus. One file is created for each pocket of the transport where the items were captured, allowing synchronization with the sort pattern.

Nautilus Posting File Generator Import

Nautilus Posting File Generator Import enables financial institutions to import an electronic image cash letter in DSTU X9.37 file format and create a posting file for the core banking application to post the transactions. Prior to licensing, Fiserv must validate and approve the application being interfaced.

Nautilus OMR Marks Generator

Nautilus OMR Marks Generator provides a DLL used to print optical marks on image statements for mail automation. It is customized to your mailing automation system to accept the font and positioning requirements of vendors such as Pitney Bowes and Bell and Howell. Nautilus applies the optical marks as part of the image statement print rendering process. Nautilus OMR Marks Generator may be used in conjunction with Nautilus Print Set Processor.

Nautilus Gateway Caching Server

Nautilus Gateway Caching Server enables an organization with distributed locations to manage file caching geographically, to provide reduced retrieval times for large documents such as PDF, OLE and CAD drawings at the remote locations. This greatly improves efficiency by giving Nautilus users access to large documents from a local copy.

Nautilus Full Text Indexing for Autonomy IDOL

Nautilus Full Text Indexing for Autonomy IDOL integrates with Autonomy IDOL to provide advanced full-text searches within documents stored in Nautilus. Words or phrases can exist in COLD documents, text renditions of image documents (OCR images) and many third-party application documents. Nautilus Full Text Indexing for Autonomy IDOL can perform fuzzy searches, wildcard searches, stemming searches, thesaurus searches, and searches combining full-text and keywords on document types.

Easy Anywhere Access to Your Content

Nautilus Mobile Access for Android™ Phone

Nautilus Mobile Access for Android Phone provides mobile employees with the ability to access pending work in workflow queues; view documents and keywords; execute ad hoc tasks; capture from the Android camera; and view, modify and create notes from their mobile devices.

Nautilus Mobile Access for iPad®

Nautilus Mobile Access for iPad provides mobile employees with the ability to access pending work in workflow queues; view documents and keywords; execute ad hoc tasks; and view, modify and create notes from their mobile devices. Nautilus Mobile Capture for iPad allows mobile employees to cleanly capture images with edge detection, crop, deskew, brightness/color controls and image size/quality controls.

Nautilus Mobile Access for iPhone®

Nautilus Mobile Access for iPhone provides mobile employees with the ability to access pending work in workflow queues; view documents and keywords; execute ad hoc tasks; capture from the iPhone camera; and view modify, and create notes from their mobile devices.

Nautilus Mobile Access for Windows® Phone

Nautilus Mobile Access for Windows Phone provides mobile employees with the ability to access pending work in workflow queues; view documents and keywords; execute ad hoc tasks; capture from the device camera; and view, modify and create notes from their mobile devices.

Nautilus Item Processing Check Access

Nautilus Item Processing Check Access provides a necessary interface from the production-oriented archive to the client desktop. It allows an end user to request check information and retrieve images in a transparent manner along with routine COLD reports and documents. Full document, check and report cross-referencing are seamlessly provided within Nautilus.

Nautilus Concurrent Client

Nautilus Concurrent Client is an access license for Nautilus that provides retrieval, viewing, printing and management of documents. Nautilus Concurrent Client has a minimum connection (lease) time of five minutes.

Nautilus Unity Briefcase

Nautilus Unity Briefcase provides offline access to documents and processes for a disconnected, field-based workforce.

Nautilus Unity Client Server

Nautilus Unity Client Server is a desktop client built on .NET and WPF that provides a customizable user experience to the desktop.

In version 16, Nautilus Unity Client Server provides a new user interface with better user prompts and dialogs

Nautilus Web Server

Nautilus Web Server provides users with immediate access to their information and documents – anywhere, anytime – via standard web browsers. Through a standard or customized intuitive user interface, users can view, print, annotate and distribute any information object stored within Nautilus.

By increasing operational efficiency and user responsiveness, Nautilus Web Server dramatically changes the way companies do business with customers, suppliers and remote offices. Nautilus Web Server enables an enterprise to create automated customer service applications that allow customers 24- hour online access to account information, order status, historical data and product information.

In version 16, Nautilus supports evergreen browsers including Chrome, Firefox and Edge. It also delivers greatly enhanced HTML support.

Nautilus External Access Client

Nautilus External Access Client enables authorized access to information stored in Nautilus to those outside the organization such as customers, members, partners, vendors and brokers.

Nautilus Customer Identification Access

Nautilus Customer Identification Access provides image retrieval of On Us checks, signature cards/clips and photo IDs for an unlimited volume of user seats.

Nautilus Workstation Client

Nautilus Workstation Client provides retrieval, viewing, printing and management of documents. Only a thick client can use this license.

Integrate With Your Other Applications

Nautilus API Retrievals

Nautilus API Retrievals provides a queries per hour access license that can be used by third-party applications to interact with document via a Nautilus API.

Nautilus Archival API

Nautilus Archival API allows documents produced from an external system, such as Nautilus Document Designer, to be transmitted into Nautilus via API processes. If the system is configured without using Nautilus Document Designer, configuration of the interface processes are required on the host application to communicate with the Archival API.

Nautilus Reverse API

Nautilus Reverse API allows you to have Nautilus display result sets and documents, or have Nautilus pass the documents back to your application for display. For Nautilus to handle the display of result sets and documents, the Nautilus Client must be installed on the workstation that is calling the API.

Nautilus Unity Integration Tool Kit

Nautilus Unity Integration Tool Kit provides an object-oriented API that exposes key Nautilus functionality. Perform document queries and archival, execute workflow tasks, modify keyword values and more.

Nautilus Integration for DocuSign® eSignature

The Nautilus Integration for DocuSign eSignature (16) allows you to electronically obtain signatures from people outside of your organization by providing complete management of processes that require secure electronic signatures in the cloud. The integration manages the signature cycle within Nautilus by automatically packaging documents and relevant signer information, sending this information securely to DocuSign, and collecting the completed documents. Obtain important signatures faster with Nautilus Integration for DocuSign eSignature.

Nautilus Web Services Publishing

Nautilus Web Services Publishing facilitates point-and-click creation of standard web services that provide access to Nautilus functionality for use by external users or third-party applications. With a "no coding" interface, Nautilus Web Services Publishing opens the door for many organizations to create data-level integrations between

Nautilus and critical business systems. Users can work in their business systems with the confidence that they have the most up-to-date data and content.

Nautilus WebView Image Access

Building a custom interface to support check image (or other single document) retrieval for your institution's home banking system can be a time-consuming and labor-intensive undertaking. Skilled programmers may be required after implementation to maintain the system. Each time the code is opened for programming, the possibility of errors is increased. Nautilus WebView Image Access provides a simple-to-use home-banking check image retrieval interface.

Nautilus WebView Image Access is a web-based interface to locate and retrieve image objects and display them to any browser. An Active Server Page (ASP) program retrieves check images by submitting a URL with a set of clearly defined arguments. These defined arguments provide a standard and straightforward interface to facilitate integration with other web-based applications. With its intuitive design, implementation is achieved in hours rather than days. Maintaining the system does not require high-level programming skills. Note: Costs associated with any home banking vendor are separate and will be incurred by the client.

Nautilus Advanced WebView Image Access

Nautilus Advanced WebView Image Access extends the capabilities of WebView Image Access to build and maintain custom interfaces for your home-banking system by adding multiple document set retrieval, such as statements with text and check images.

Nautilus Advanced WebView Image Access also provides a "pick list" of available records in the archive (by predefined keyword and document types) that match the requested search criteria. By selecting from the list, any statement or document image can be conveniently displayed for viewing through your secure website. Licensees of Nautilus WebView Image Access may upgrade with full credit applied toward Nautilus Advanced WebView Image Access. Costs associated with the home banking vendor are separate and the responsibility of the client institution.

Nautilus Enterprise Application Enabler

Nautilus Enterprise Application Enabler affords an unlimited number of applications to have seamless integration between the organization's core business applications and Nautilus – without programming. Nautilus Enterprise Application Enabler improves employee efficiency. It allows users to retrieve supporting documents, including images, application files and text reports, by simply clicking on a specified field within any Microsoft Windows-based program. Additionally, multiple departments can share information regardless of their respective core applications, maximizing the organization's investment in separate line-of-business applications.

Nautilus Integration for AnyDoc® OCR

Nautilus Integration for AnyDoc OCR allows documents and associated keyword values to be archived directly into Nautilus as an integrated step in OCR for the AnyDoc document capture process.

Nautilus Integration for Cardiff LiquidOffice™

Nautilus Integration for Cardiff LiquidOffice provides the ability to archive forms created in Cardiff LiquidOffice.

Nautilus Integration for Cardiff TeleForm

Nautilus Integration for Cardiff TeleForm enables immediate availability of image form files exported from TeleForm to the Nautilus archive. Nautilus may be used to retrieve, view, text search, annotate, cross-reference, revise, highlight, print, fax or email documents online.

Nautilus Integration for PFU TimeStamp Service

Nautilus Integration for PFU TimeStamp Service enables you to include tamper-proof document authenticity as part of your record retention strategy. A time stamp provides indisputable proof that the contents of any document in Nautilus existed at a particular point in time and have not changed since that time.

The PFU TimeStamp Service enables organizations to be compliant with several domestic and international regulations, offer document/record authentication, and facilitate real-time intellectual property management. Additional PFU TimeStamps may be acquired in volumes of 1,000, 10,000 or 100,000, with block pricing discounts for greater quantities.

Nautilus Content Connector for Microsoft SharePoint

Nautilus Content Connector for Microsoft SharePoint enables the automatic linking of documents, batch processed into Nautilus, to related items and records managed in SharePoint. Based upon rules defined by a SharePoint site owner, relevant Nautilus content is made accessible as item list attachments and document library items.

Nautilus Expansion for Aperio™

The Nautilus Expansion for Aperio license provides advanced functionality for Fiserv customers running both Nautilus and Aperio. This expansion extends basic document viewing to include features such as cross-referencing and annotations. Also included is automated alert logic and messaging to notify Aperio when document events occur in Nautilus.

Nautilus Host Application Enabler

Nautilus Host Application Enabler provides organizations quick and easy access to extend Nautilus functionality to legacy terminal applications, allowing an organization to leverage its current investments. Permitting users to utilize two applications from a single interface improves productivity by reducing time spent switching between applications. This integration is point-and-click configurable and requires no API programming, scripting or modifications to the terminal application.

Nautilus Integration for Novell® GroupWise®

Nautilus Integration for Novell GroupWise allows organizations to generate email content as a core information stream of an organization's business process, while helping to simplify the archiving and retrieval of email messages and attachments. GroupWise enables business users to view content, store emails and attachments, and participate in the Nautilus workflow. The integration provides a retrieval user interface, workflow interface and Microsoft Explorer extension.

Nautilus Integration for Oracle® e-Business Suite

Nautilus Integration for Oracle e-Business Suite provides users seamless access to supporting documents from the Oracle e-Business Suite application. The integration also provides automated indexing by linking the document repository with the Oracle database schema. Nautilus Integration for Oracle e-Business Suite requires Oracle e-Business Suite version 11i or greater.

Nautilus Web Parts for Microsoft SharePoint

Nautilus Web Parts for Microsoft SharePoint allows Nautilus components to be integrated in the SharePoint interface. The integration module leverages Microsoft SharePoint and point-and-click StatusView functionality.

Users are able to create personalized views of content and processes with web portal components called "portlets." After portlets are assigned and registered for authorized users, the portlets may be added to SharePoint pages and configured as appropriate. Then portlets provide a seamless integration with both SharePoint and Nautilus. User authentication can be performed using NT Authentication or SharePoint Portal Server's Single Sign-On service.

Measure and Monitor Your Process and System Performance

Nautilus StatusView

With Nautilus StatusView, administrators and users alike can point and click their way to custom web interfaces for viewing Nautilus content. Using Nautilus StatusView to display information that is needed throughout a workday can drastically reduce the time it takes to access certain Nautilus features and the time to retrieve documents.

Nautilus Business Activity Monitoring

Nautilus Business Activity Monitoring provides real-time snapshots of workflow processes that are available through the statusing interface of the Nautilus Web Server, a SharePoint website or a WSRP 1.0-compliant portal. Portlets are configurable by business users who have appropriate rights.

Nautilus Exception Reporting

Nautilus Exception Reporting recognizes relationships between a base document type and one or more secondary document types and generates reports on missing, matching or aged items. Nautilus Exception Reporting allows you to create reports based on a keyword relationship between document types. It queries Nautilus for indices found on one document type to validate the presence of complementary document types with the same indexing information.

Absent documents or index discrepancies are reported to the user. This alerts you to documents that are expected but have not been brought into Nautilus.

Nautilus Report Mining

Nautilus Report Mining allows organizations to easily analyze business performance trends, enabling effective sharing of information and valuable insight across the enterprise. Business users can visually create and generate reports from the Nautilus client without relying on IT staff. Nautilus Report Mining automatically extracts data from text documents and aggregates the information for analysis in Microsoft Excel.

Nautilus Reporting Dashboards

Nautilus Reporting Dashboards give organizations immediate visibility into system and business health. Users can create and share dashboards – highlighting business data most important to them – without the need to engage IT resources. Dashboards present data in a variety of graphical formats, including charts, graphs, scorecards and maps. Interactive features then allow users to easily monitor performance and analyze trends in real time. Reporting Dashboards enable you to quickly view and interpret relevant data and make proactive business decisions.

Nautilus Report Mining Integration for Datawatch® Monarch®

Nautilus Report Mining Integration for Datawatch Monarch allows you to explore, consolidate, format and aggregate detailed business transactions by extracting data from COLD information stored within Nautilus for use within desktop applications such as Microsoft Excel, 123, Microsoft Access, dBase and Paradox.

This seamless interface to Monarch allows information-rich reports processed and stored within Nautilus to be analyzed to uncover patterns and relationships contained within a business's activity and transaction history.

Taking legacy information to a new level, this interface provides improved business intelligence to the business analyst's desktop. Graphs and charts can be added to customized reports to help your professionals visualize trends and relationships within mission-critical data.

Nautilus Report Services

Nautilus Report Services enables you to create charts, graphs and reports by using the information in Nautilus WorkView.

Securely Store, Retain and Control Your Content

Nautilus Document Retention

Deleting valueless documents saves space and time while reducing costs. Nautilus Document Retention enables the systematic management of documents as they are created, maintained and destroyed. With defined and enforced criteria for maintaining and destroying documents, organizations can avoid fines, penalties and other legal consequences for documents that are not kept long enough, destroyed improperly or stored too long.

Because documents are created and used for various purposes, criteria are based upon a specified period of elapsed time or upon user intervention and approval prior to destruction. These criteria define the qualification process as either static or dynamic retention. Nautilus Document Retention manages database and storage resources at the document type level. Administrative authorization controls ensure system integrity.

Static retention automatically purges documents according to a preconfigured time interval. It requires no user intervention, saving time and ensuring that documents are deleted appropriately. Static retention can be based on the document date or the document storage date. For instance, certain daily reports may become irrelevant after 10 days. When the retention period expires, Nautilus purges.

Dynamic retention allows the date of deletion to be determined based on a custom workflow, VBScript or external action in a line-of-business application. Documents are not deleted or purged until approved by a system user. For example, a manager may want Nautilus to prompt a review of loan files over $100,000 before they are deleted.

Nautilus Check Image Statement

Allows the rendering of image statements by matching primary documents to supporting documents for printing. Supporting documents such as checks may be printed as multiples on a page, minimizing paper usage. Nautilus Check Image Statement enables you to better manage supporting documents, reducing the cost of forwarding relevant materials with a customer statement, increasing statement accuracy through process automation, and improving customer satisfaction and employee productivity.

Nautilus DocPlus™

Nautilus DocPlus offers fully automated document generation with advanced functionality not found in other legacy applications. In addition to flexible input and output formats, including the ability to implement business rules for output design, the solution provides for unlimited marketing messaging and cross-selling opportunities to targeted customers. Features include:

- Automated statement processing
- Optional parallel processing with load balancer
- Browser-based job monitor
- User-defined print output segmentation
- Expanded matching criteria
- Enhanced reporting
- Increased performance
- JPEG image support
- Cropping of image replacement document (IRD) images onto image pages
- Enhanced barcode generation
- Archive neutrality (easily integrates with Nautilus and other archives)
- Optional PDF creation for storage in Nautilus

Nautilus Document Designer

Create more appealing and functional customer-specific documents with the flexibility to design dynamic documents from data streams. Nautilus Document Designer lets you adjust documents quickly and cost-effectively, and it enables multiple iterations of a document. In addition to flexibility and cost savings, Nautilus Document Designer gives you a powerful customer service and marketing tool. It can be used to create statement layouts to be used with Nautilus Image Statements and Nautilus Enterprise eDocument Distribution, allowing you to design any document appearance as appropriate. Placement of headings and other information is automatically adjusted based on the data being fed from the document host file. Multiple document layouts can be used to create documents from one document file.

Nautilus Aggregate Publishing

Nautilus Aggregate Publishing allows customers receiving published CDs or DVDs to have a database that contains index/pointer information for multiple published CDs or DVDs. When they receive a new CD or DVD, customers update the aggregate database with new index/pointer information. Note: A Nautilus Aggregate Publishing license must be purchased to take advantage of this functionality.

Nautilus CD Authoring

Nautilus CD Authoring integrates with a supported CD-R writer to create a copy of the data portion of Nautilus. Data is stored in disk groups (a disk group is made up of one more volumes). When a CD-R is authored, all data files from a disk group volume are placed onto the media. Nautilus maintains the location of each document as it migrates from media to media.

The media may be used as an inexpensive tier of near-line storage when managed in a jukebox or it may be placed on a shelf for offline access from any network accessible CD-R drive. Nautilus CD Authoring only exports the data object from the Nautilus archive, not the index detail for offline storage. Multiple simultaneous production is supported by Nautilus.

Nautilus Automated CD Authoring

Nautilus Automated CD Authoring allows you to schedule the functionality of CD Authoring. It also integrates with a supported CD-R writer to create a copy of the data portion of Nautilus.
Nautilus stores data in disk groups (a disk group is made up of one or more volumes). When a CD-R is authored, all data files from a disk group volume are placed onto the media. Nautilus maintains the location of each document as it migrates from media to media. The media may be used as an inexpensive tier of near-line storage when managed in a jukebox or it may be placed on a shelf for offline access from any network accessible CD-R drive. Nautilus CD Authoring only exports the data object from the Nautilus archive, not the index detail for offline storage.

Multiple simultaneous production is supported by Nautilus. Nautilus Automated CD Authoring provides automatic creation of backup CDs, using a Rimage system when a disk group is full.

Nautilus Automated CD/DVD Publishing

Nautilus Automated CD/DVD Publishing enables publishing jobs to be defined in advance and produced automatically at predetermined intervals. This eliminates the need to dedicate a user for launching backup jobs directly through the client.

Nautilus Automated CD/DVD Publishing gives users the ability to select a group of documents for daily, weekly, monthly, quarterly, biannual or annual publishing.

Publishing jobs scheduled at these specified intervals will be written to CD/DVD media via your Rimage unit. You have control over the amount of days to wait after the publishing period has completed. If all documents for the publishing period are not available until five or 10 days after the designated period, Nautilus Automated CD/DVD Publishing will wait until the delay period is over before launching the job. Publishing jobs can be scheduled to begin at a particular time of day in order to utilize system resources after hours or after maintenance downtime is completed.

The user can control the layout of the label and content on these CDs/DVDs. User-defined static strings that are job specific, as well as the start and end date of the published period, can be configured to appear on the label to differentiate CDs/DVDs throughout the year. Through Nautilus Automated CD/DVD Publishing, users do not need to manually locate and publish the appropriate documents for each defined interval. Published jobs containing required documents are guaranteed to be accurate and will be properly labeled by the Rimage unit.

Nautilus Automated DVD Authoring

Nautilus Automated DVD Authoring enables you to schedule the functionality of DVD authoring. It integrates with a supported DVD-R writer to create a copy of the data portion of Nautilus.

The system stores data in disk groups (a disk group is made up of one more volumes). When a DVD-R is authored, all data files from a disk group volume are placed onto the media. Nautilus maintains the location of each document as it migrates from media to media. The media may be used as an inexpensive tier of near-line storage when managed in a jukebox or it may be placed on a shelf for offline access from any network accessible DVD-R drive. Nautilus Automated DVD Authoring only exports the data object from the archive, not the index detail for offline storage. Multiple simultaneous production is supported. Nautilus Automated DVD Authoring provides automatic creation of backup DVDs, using the Rimage system when a disk group is full.

Nautilus Automated Media Processing

Nautilus Automated Media Processing organizes and automates the process of producing CDs and/or DVDs for customers processing in multi-institutional environments who use a Rimage CD/DVD Producer.

Nautilus Blu-ray Authoring

Nautilus Blu-ray Authoring provides support for high-capacity Blu-ray storage for data backups or document export/publishing. High-quality lasers are recommended, and drive equipment should be tested to ensure production readiness.

Nautilus Document Transfer

Nautilus Document Transfer facilitates the movement of documents between multiple Nautilus systems, allowing users to interact with information across distributed organizational structures and geographies.

Nautilus Storage Integration for EMC Centera®

Nautilus Storage Integration for EMC Centera allows organizations to store Nautilus Disk Groups on an EMC Centera device as an alternative to standard file servers. EMC Centera is a magnetic disk-based storage system that offers data integrity and added security. This module allows organizations to further leverage their existing investment in EMC Centera devices by combining them with the enterprise content management capabilities of Nautilus.

Nautilus Storage Integration for IBM® Tivoli®

NautilusStorage Integration for IBM Tivoli expands Nautilus Disk Groups capabilities to include making use of Tivoli Storage Manager for document archiving.

Nautilus Distributed Disk Services

Nautilus Distributed Disk Services is a secure, middle-tier application that brokers communication between Nautilus and the file server used to store Nautilus disk groups. It greatly simplifies the administrator's task and enables implementation of high availability and failover access to clusters.

Nautilus Encrypted Alpha Keywords

Nautilus Encrypted Alpha Keywords enables storage of sensitive alpha-numeric keywords in an encrypted format. Because keyword values are encrypted strings in the database, viewing may be controlled or masked, such as displaying only the last four digits of a Social Security or account number.

Nautilus Encrypted Disk Groups

Nautilus Encrypted Disk Groups enables organizations to encrypt documents as they are imported into Nautilus and stored on a file server. These features protect your data "at rest" by storing documents as encrypted files. If viewed outside of Nautilus, documents will be unreadable.

Nautilus Multi-User Archive

Nautilus Multi-User Archive supports multiuser access to a single instance of the SQL database.
It includes:

• Nautilus configuration

• Basic text search and print servers

• Three-tier Nautilus broker

• A license to use Nautilus in conjunction with a supported multiuser SQL database management system (DBMS) in a single institution environment

Nautilus Letter Archival Utility

Nautilus Letter Archival Utility enables Microsoft Word letters generated by the mail merge system integrated into LoanServ™ from Fiserv to be ingested into Nautilus. It is essentially a preprocessor for Nautilus Document Import Processor, handling LoanServ output without relying solely on the PCL-formatted output.

Nautilus Multilingual Publishing

Provides users of Nautilus Publishing with the add-on ability to create published CDs or DVDs with the configured system attributes that are able to be translated (Document Type Groups, Document Types, Keyword Types, as examples) and installed in either the native system language or an alternative language.

Nautilus Active Directory Federation Services

Expand Nautilus single sign-on access to users who are not on the same domain. Utilizing the Windows Identity Foundation (WIF) framework, Nautilus Active Directory Federation Services enables a Nautilus system to authenticate against a "foreign" AD/LDAP tree, eliminating the need to have Nautilus Web. Unity or Outlook client machines must be authenticated to a domain in order for Nautilus to authenticate.

Other Nautilus Modules

Nautilus QuickStart for CUSA®

Nautilus QuickStart for CUSA is a packaged solution designed to offer advanced document management capabilities to CUSA credit unions currently running the AMS image archive. The package contents includes everything needed to upgrade from AMS to Nautilus quickly and seamlessly.

Nautilus QuickStart for XP2®

Nautilus QuickStart for XP2 is a packaged solution designed to help XP2 credit unions currently running the DSAVE report archive to quickly migrate to a Nautilus solution.

Nautilus QuickStart for Reliance®

Nautilus QuickStart for Reliance is a packaged solution designed to offer advanced document management capabilities to Reliance credit unions currently running the AMS image archive. The package contents includes everything needed to upgrade from AMS to Nautilus quickly and seamlessly.

Nautilus Single Sign-On for CA eTrust SiteMinder®

Nautilus Single Sign-On for CA eTrust SiteMinder allows Nautilus to be configured to use authentication credentials from CA eTrust SiteMinder. Single sign-on services centralize authentication and authorization across multiple applications.

Nautilus Single Sign-On for Custom Applications

Nautilus Single Sign-On for Custom Applications allows the configuration of authentication credentials from selected single sign-on service vendors. Single sign-on services centralize authentication and authorization across multiple applications.

Nautilus Single Sign-On for IBM Tivoli Access Manager

Nautilus Single Sign-On for IBM Tivoli Access Manager allows the configuration of authentication credentials from IBM Tivoli Access Manager. Single sign-on services centralize authentication and authorization across multiple applications.

Nautilus Single Sign-On for Microsoft Active Directory® Service

Nautilus Single Sign-On for Microsoft Active Directory Service allows the configuration of authentication credentials from Microsoft Active Directory. Single sign-on services centralize authentication and authorization across multiple applications.

Nautilus Single Sign-On for Microsoft Passport

Nautilus Single Sign-On for Microsoft Passport allows the configuration of authentication credentials from Microsoft Passport. Single sign-on services centralize authentication and authorization across multiple applications.

Nautilus Single Sign-On for OnBase® Entrust

Nautilus Single Sign-On for OnBase Entrust is an authentication scheme used to provide single sign-on authentication between Nautilus and custom line-of-business (LOB) applications.

Nautilus Single Sign-On for PeopleSoft® Enterprise

Nautilus Single Sign-On for PeopleSoft Enterprise allows the configuration of authentication credentials from Peoplesoft Enterprise version 8. Single sign-on services centralize authentication and authorization across multiple applications.

Nautilus Single Sign-On for RSA® Access Manager

Nautilus Single Sign-On for RSA Access Manager allows Nautilus to be configured to use authentication credentials from RSA without requiring additional customization.

Nautilus Single Sign-On for SAP® Enterprise Portal 6.0

Nautilus Single Sign-On for SAP Enterprise Portal 6.0 allows the configuration of authentication credentials from SAP Enterprise Portal 6.0. Single sign-on services centralize authentication and authorization across multiple applications.

Connect With Us

For more information on Nautilus,
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About Fiserv

Fiserv is driving innovation in Payments, Processing Services, Risk & Compliance, Customer & Channel Management and Insights & Optimization. Our solutions help clients deliver financial services at the speed of life to enhance the way people live and work today. Visit www.fiserv.com to learn more.

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