

# DocFinity® COLD-ERM: Computer Output to Laser Disk – Enterprise Report Management

Monitor nearly any print spooler to automatically index and archive print streams

## The Need

Organizations today print millions of different documents for millions of different reasons. Hard copies of bills are mailed to customers and second copies are filed away on site. When a question or problem arises, oftentimes the hard copy must be located before the situation can be resolved.

Take for example an insurance company printing policies to send to their customers. The policy is printed, put into an envelope and mailed. A hard copy is placed in the customer's file. If the customer has a question regarding the policy when he receives it, the customer service representative with whom he speaks must first locate the customer's file and then find the policy within that file. Sometimes this can take minutes, but sometimes it takes hours and even days. Inefficient, time-consuming processes like this are repeated in other industries and offices all the time. Luckily, it doesn't have to be that way.

## The DocFinity Solution

DocFinity COLD-ERM (Computer Output to Laser Disk – Enterprise Report Management) modules will monitor your mainframe, network servers, unix servers and virtually any type print spooler for print streams, and automatically capture that information for easy storage and retrieval of computer-generated reports, ranging from accounting reports to bank statements to insurance policies to invoices. DocFinity's

reports management solution is capable of capturing print streams in ASCII and EBCDIC for simple line reports and more advanced print streams like IBM AFP, Xerox Metacode/DJDE, Postscript/PDF and PCL for more detailed and formatted statements, bills and invoices. COLD-ERM provides rapid access to information, making it more manageable, people more productive, and companies more profitable.

DocFinity COLD-ERM is also a powerful Windows-based Bill and Invoice Presentment and Settlement (BIPS) program that allows you to archive, index, store, manage and retrieve computer output on the memory device of your choice—optical disk, CD-ROM, DVD, etc. BIPS provides the ability to access bills and statements via the Web at any time, thereby reducing call center calls and increasing customer satisfaction. Companies exploring the potential to display bills, invoices, etc. on the Web will find DocFinity COLD-ERM an

important tool that reveals new routes to improved customer service, as well as new sources of revenue through the development of new customer relationships.

By eliminating unnecessary printing and microfiche production, your organization will see substantial savings almost immediately. Another benefit of storing information in this manner is that it requires significantly less storage space. New files, including word processing, spreadsheet, CAD, multimedia, voice, video, and other formats can easily be added to existing folders. The files become a part of the folder just like an archived report.

## Key Features

- Monitors print streams to automatically capture, index, and store reports
- Works with ASCII, EBCDIC, IBM AFP, Xerox Metacode/DJDE, Postscript/PDF, and PCL
- Provides an audit trail and security features
- Permits forms overlay and email distribution
- Compresses text reports up to 96 percent
- Integrates easily with third-party software packages
- Works with standard Web browsers
- Provides the capability to associate captured print streams with other documents for easy filing and retrieval

## DocFinity COLD-ERM result:

a single user interface to search both report data and any other electronic content or document files.



| ACCOUNT                              | DESCRIPTION                    | CURRENT BALANCE | CURRENT TOTAL |
|--------------------------------------|--------------------------------|-----------------|---------------|
| <b>S U B T O T A L</b>               |                                |                 |               |
| 1-01                                 | DEPOSIT AND FEES ON LOAN       |                 |               |
| 101-101-0                            | DEPOSIT ON SALES               | 276,521.00      |               |
| 101-101-0                            | DEPOSIT ON INVESTMENTS         | 100,400.00      |               |
| 101-101-0                            | DEPOSIT ON DEPOSITS            | 100,400.00      |               |
| 101-101-0                            | LOAN WITH INTEREST             | 3,499.00        |               |
| 101-101-0                            | LOAN PLACEMENT FEE             | 4,000.00        |               |
| 101-101-0                            | LOAN CLOSING BANK FEE          | 100.00          |               |
| 101-101-0                            | CREDIT LIFE AND DISBURSE       | 27,490.00       |               |
| TOTAL DEPOSIT AND FEES ON LOAN       |                                | 508,410.00      | 508,410.00    |
| <b>S U B T O T A L</b>               |                                |                 |               |
| 1-02                                 | SALES FROM INVESTMENTS         |                 |               |
| 101-101-0                            | S. S. INVESTMENT SALES DEPOSIT | 156,421.00      |               |
| 101-101-0                            | SALES FROM INVESTMENT          | 10,000.00       |               |
| 101-101-0                            | INTEREST ON SALES              | 700.00          |               |
| TOTAL SALES FROM INVESTMENTS         |                                | 167,121.00      | 167,121.00    |
| <b>S U B T O T A L</b>               |                                |                 |               |
| 1-03                                 | FINANCIAL SERVICE DEPOSIT ON   |                 |               |
| 101-101-0                            | FINANCIAL SERVICE DEPOSIT      | 46,100.00       |               |
| TOTAL FINANCIAL SERVICE DEPOSIT ON   |                                | 46,100.00       | 46,100.00     |
| <b>S U B T O T A L</b>               |                                |                 |               |
| 1-04                                 | DEPOSIT CHANGE ON DEPOSIT ACCT |                 |               |
| 101-101-0                            | DEPOSIT ON DEPOSIT CHANGE      | 10,000.00       |               |
| 101-101-0                            | DEPOSIT ACCT. DEPOSIT ON       | 10,000.00       |               |
| 101-101-0                            | DEPOSIT ON DEPOSIT ACCT        | 2,000.00        |               |
| TOTAL DEPOSIT CHANGE ON DEPOSIT ACCT |                                | 22,000.00       | 22,000.00     |
| <b>S U B T O T A L</b>               |                                |                 |               |
| 1-05                                 | TRADER SERVICE CHANGE          |                 |               |
| 101-101-0                            | TRADER SERVICE CHANGE          | 3,000.00        |               |
| 101-101-0                            | REVENUE SERVICE CHANGE         | 10,000.00       |               |
| 101-101-0                            | TRADER SERVICE ACCOUNT         | 2,000.00        |               |
| 101-101-0                            | S. S. CHANGE                   | 3,000.00        |               |