

# VisionContent: Transaction

## Long-term archival and retrieval

The VisionContent: Transaction solution provides for the long-term archival and retrieval of checks, remittances, and customer statements. Compatible with the Windows® operating systems and fully integrated with Metavante Image Solutions VisionIP, VisionRemit, and VisionRisk solutions, the VisionContent: Transaction software allows you to digitize, import, index, and track all of your institution's transaction data and images. When a request for information comes in, the necessary response can be completed in minutes – not days.

## Consider These VisionContent: Transaction Advantages:

- **Fully integrated with VisionIP and VisionRemit** – Easily adds the images and data from these systems to your document archives.
- **A cost-effective, PC-based system** – Processes the images and data of millions of new documents per day when integrated with VisionIP and VisionRemit software.
- **An easy-to-use graphical user interface (GUI)** – Greatly reduces operator training time. Powerful query functions perform simple to advanced archive queries. Saves complex queries for reuse, or reschedules them to run automatically at specified times. Performs data mining to enhance marketing initiatives, add services, and expand revenues.
- **Flexible access** – Accesses images and data located online (server drives), or near-line.

- **Versatile export options** – Exports data in Excel® and Word for Windows format; exports images in several popular graphic file formats.
- **Scalability** – A totally integrated, easily expandable system that includes full network capabilities. Install the system you need now and expand it later, no matter how big your operation grows.
- **Advanced, comprehensive features** – Constantly exceeds operator expectations.
- **A history of success** – Has a proven track record in high-volume document management operations. For a fast, flexible document management system designed for the needs of today's busy institution, your best choice is VisionContent: Transaction software.

## A Feature-Rich Family of Solutions for All Your Archival and Retrieval Needs

With VisionContent: Transaction software, your institution has everything it needs to efficiently archive and retrieve data and images generated by VisionIP and VisionRemit systems and similar item processing solutions. VisionContent: Transaction includes a secure Web-based solution that enables you to access transaction data and images via the Internet.

The VisionContent: Transaction solution offers long-term archival and retrieval of check data and images generated by item processing solutions. All check documents (data and images) are imported and indexed directly to the VisionContent: Transaction database. The application can then perform scheduled or ad-hoc queries on check MICR lines and other data associated with the item in various user-defined field combinations.



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## Sophisticated Research

The VisionContent: Transaction solution provides robust and configurable query screens to meet your wide range of item- and transaction-based research needs. You can perform “simple” to “batch” to “expert” queries from a single point of research for hyper-fast access to data and images. Quickly and easily construct sophisticated query expressions, from simple equality expressions to complex SQL statements, to maximize your searches.

Initiate queries on single or multiple fields (such as account, amount, serial number, sequence, and date) and sort data by single or multiple columns. Set up custom-scheduled queries to be executed at pre-defined dates and times, and direct results to separate worksheets. Use the query history feature to page through submitted queries and resubmit previous queries. Retrieved items and images can be viewed, printed, faxed, or e-mailed.

## Image-Based Data Mining

Metavante’s VisionContent: Transaction solution provides an optional module that gives you powerful access to data for creating detailed business analysis, identifying business opportunities, and better managing your enterprise. You can perform queries on any combination of MICR and data fields across multiple processing days to mine valuable business and marketing data. Effectively extract transaction data to create custom reports. Use this knowledge for a variety of applications, including identifying prospects with competing institutions, targeting profitable customers, compiling transaction trends, improving customer satisfaction and loyalty, and preventing fraud.

VisionContent: Transaction robust query screens allow you to perform simple to complex research for high-

speed access to all types of image document data. Query results are queued and displayed in a spreadsheet-style interface for easy browsing. You can customize the appearance of the worksheet, sort data, pull transactions for individual items into separate worksheets, display images in pop-up windows, lock selected rows to not scroll, tag specific items for printing or faxing, and perform other work-efficient functions. Export worksheet data directly to Excel<sup>®</sup> and Word for Windows, as well as to a Word template. Cut and paste data to other applications.

## Image Manipulation and Viewing

The VisionContent: Transaction solution enables you to manipulate and view images in a variety of ways. You can view the front or back of images. View multiple images. Magnify, flip, rotate, reverse, and clean up images. Copy images to the clipboard. Cut and paste images into other desktop applications, like Microsoft Word for Windows. Export images to various standard graphic file formats (BMP, JPEG, TIFF, etc.). You can even display the data and images or data only of query results. The VisionContent: Transaction solution also supports the display of bi-tonal or grayscale images, and allows you to add a “sticky note” to an image with an assigned priority, access right, or expiration date. Users can research an item by note content, priority, or special code.

## Multiple Layers of Security

The VisionContent: Transaction solution is designed with a robust, scalable security architecture to effectively manage the protection of information assets. An easy-to-use graphical interface allows you to apply security at the Windows layer, SQL Server database layer, and the



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VisionContent: Transaction application layer. VisionContent: Transaction seamlessly integrates with Microsoft security, enabling you to manage users and groups, set up the permissions and restrictions, and create single- or multiple-use logon IDs and passwords. You can specify which users and groups are authorized to make additions, deletions, and changes to certain database tables. VisionContent: Transaction allows you to apply security restrictions to various data, such as institution, account, amount, transit routing, transaction code, employee accounts, and institution-specific fields.

## Multiple Printing Options

The VisionContent: Transaction solution provides many options for customizing the appearance of your printed image pages. You can define the number of images per page (single or multiple) and choose from a variety of caption and header/footer options, such as font size, position, and use of bitmap images. Specify the formatting and printing of custom text-only or text-and-image pages. Tools also allow you to modify the aspect ratio of printed images to meet your sizing needs.

## Image Delivery

Metavante's VisionContent: Transaction solution enables you to fax and e-mail a single image or group of images from your PC. Simply click a button on the print screen to fax items. Click the e-mail icon on the workstation desktop to launch your default Windows e-mail application. Easily attach the front and back images of items. Images can be viewed in the recipient's mail application.

## Optional Billing and CIF Integration

The VisionContent: Transaction solution offers various user-defined billing options, such as billing of queries, printouts, faxes, and e-mails. Enhance data-entry efficiency by uploading your current Customer Information File (CIF) into the VisionContent: Transaction database.

The VisionContent: Transaction solution combines all the essential power and functionality with the convenience of the Internet. Using a standard Web browser, VisionContent: Transaction allows customers and employees to rapidly retrieve check and document images from local or remote VisionContent: Transaction storage sites. Designed for multi-site, high-volume, and long-term storage, this proven sophisticated technology adds another dimension to image research that helps you provide unmatched customer service.

The VisionContent: Transaction solution allows any bank customer or employee with a standard Web browser and proper security access to research, display, and print archived check images and text statements via the Internet or intranet. Authorized users simply click once to download a compact Java research tool that runs as an application. Users can pull up a list of their transactions, including lists of checks paid. They just point and click, and the front and back image of the check appears on their PC screen; they can even print the image.

With the VisionContent: Transaction Application Programming Interface (API), your Internet home bank offering is enriched by providing images to your customers. The API seamlessly integrates with your current home-banking system and allows your customers to efficiently access their check images from the VisionContent: Transaction Check archive system.



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Once images are archived, they are immediately available to customers anytime, anywhere. Using VisionContent: Transaction API shifts research requests from your staff to your customers. Customers get instant results at their convenience, in the privacy of their home or office. The API is flexible, enabling you to retain your current browser interface and security measures.

## With Metavante's Vision Content: Transaction Solution, You Can:

- Put the research process at the fingertips of customers, while providing for centralized tracking for a variety of click-charge billing models.
- Provide applications ranging from simple account access to secure, dedicated research.
- Support today's most popular Web browsers.
- Easily integrate into existing intranet infrastructure.
- Allow multiple sites to use a centralized archive location.
- Offer centralized administration and security, including application level privileges.
- Utilize industry-leading features for system administrators, operations managers, and operators.
- Provide complete parameterization for performance and ease of customization.

## The System Includes:

- A Microsoft-compliant, SQL database interface based on Microsoft Management Console to manage SQL database and directly import data from VisionIP capture files.
- Comprehensive system security, including user logins and extensive system logs.

- Input from various media: traditional transmission protocol, CD-ROM/DVD, tape, network protocols.
- Support for client workstation and browser-based check query and viewing.
- Output to customer-specified medium: print, fax, e-mail, etc.
- A flexible GUI that lets operators arrange the screen for the way they work best.
- Choice of image-and-list (item data) or list-only operating mode icon and button-driven operation. Features include cut-and-paste and range selection.

## Contact Us

For more information, contact Metavante Image Solutions at 1-800-822-6758, or visit us at [metavante.com](http://metavante.com).