

# Nautilus<sup>®</sup>

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Boost operational efficiency,  
reduce costs and improve customer  
service with a scalable enterprise  
content management solution

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Your financial institution creates, consumes and manages unprecedented amounts of content – all of which must be carefully controlled to meet compliance obligations. To support decision making, this information needs to get to the right people as quickly, completely and accurately as possible, which can be difficult using manual processes.

In addition, your members and customers want services and information on demand, in real time. You can't support those needs if business processes are slow, error prone or bogged down by tedious manual tasks. To stay competitive, your financial institution needs a way to pick up the pace.



That's where Nautilus from Fiserv comes in. Nautilus is a fully integrated enterprise content management (ECM) system designed for financial institutions. It automates workflows to streamline document-related processes across the organization and combines document capture, management and storage capabilities into a single, simple-to-use system.

Nautilus is more than a document-management tool; it's a mission-critical solution that is an underlying component of a successful digital transformation strategy.

Each Nautilus ECM function saves you money, reallocating your time for more valuable tasks and allowing you to focus on relationships. Your staff will spend more time enhancing your bottom-line profits and less time manually managing documentation and processes. The return on investment begins with the first document task that is accelerated, or the first folder process that is standardized.



## Navigating through integrated content

Nautilus combines capabilities such as electronic document management; imaging; document, check and statement storage; document foldering; workflow and case management; and records management into one easy-to-use system. You can deploy Nautilus at your own facility or at a secure Fiserv data center. Access to documents stored within Nautilus is gained through a simple-to-use, web-based application suite accessed from a standard web browser.

Nautilus enables you to capture, route, manage, share and archive high volumes of information critical to business operations, audits and service. Eliminating low-value manual tasks and making content instantly available from a single interface, Nautilus increases employee productivity and operational efficiency.

The process integrity you realize from these content management capabilities will enable you to create a solid information governance, risk and compliance framework.

## Relevant solutions, real results

### Highly scalable

Nautilus is a highly scalable, open-architected system designed so you can deploy it within any environment. Low-volume systems can be expanded to become high-volume systems, handling millions of documents while maintaining functionality and speed. Its robust scalability makes Nautilus the perfect choice for any financial institution preparing for future growth, or one that wants to improve efficiency while reducing costs.

### Reduces operating costs

Nautilus reduces and/or eliminates the overhead costs of supporting physical documents stored in file cabinets, generated by printers, copiers and fax machines, or housed at off-site physical storage facilities. Nautilus also reduces the labor required to complete important business processes.

### Increases collaboration

Nautilus promotes more thorough collaboration by providing simultaneous, secure, real-time access to content, no matter where your users are located. Nautilus provides a common framework and methodology that is user friendly and available within common applications like Microsoft® Outlook® and Office365®.



## Operational and monitoring tools

### Reduced cycle times

Nautilus eliminates the delays and inefficiencies of manual processes, increasing productivity. The increased efficiency of Nautilus in your Accounts Payable department can enable early pay vendor discounts. Leveraging Nautilus in your account-opening processes can reduce the unit cost of providing products and services.

### Improved service

Nautilus empowers your service representatives to resolve issues on the first call, with accurate and timely information. Nautilus enables you to provide self-service content processes with secure, web-based access to important documents such as billing statements, records, loan applications and contracts.

### Improved governance, risk and compliance support

The needs of governance, risk and compliance span every department, location and function. Nautilus responds with an automated, searchable database, reducing your organization's vulnerability to antiquated internal controls. You gain the power to access content securely, standardize business practices and retain content based on internal/external policies – including but not limited to regulatory compliance standards such as the USA Patriot Act, Gramm-Leach-Bliley and the Consumer Financial Protection Bureau.



We see Nautilus fitting in very well in different departments in our back office and operations. The possibilities are endless as to where we could implement Nautilus.”

**Adam Herndon**  
Project Manager  
Primerica

## Sharing information

### Document imaging and management

Nautilus provides sophisticated mechanisms to capture, index and digitally store virtually any type of document in paper or electronic format, from a variety of departments. The integrity and security of all documents, regardless of format, are protected and verifiable. Users decide how to display the search results list and corresponding descriptive information. Once a document has been retrieved and opened, Nautilus provides an array of options for viewing, annotating, revising and distributing it according to user-defined rights.

### Enterprise report management and distribution

Nautilus captures and preserves text-based records, including greenbar reports, invoices, purchase orders and statements, to reduce the time and resources required for traditional report printing and storage. Reports are stored in the same repository as other documents and can be cross-referenced. For example, a user might click on a check number in a statement to retrieve the associated check image.

Nautilus addresses every conceivable method for distributing stored documents, including web, email, fax, printing and CD/DVD publishing. Gone are the days of printing a document only to have to scan and save it back into the system. Nautilus manages electronic delivery of image statements, eliminating the need for paper, printing and postage costs.



The integration of Outlook and Nautilus has been key for us, since communication with members and the lending wing is primarily done by email. It's really easy to use Outlook integration to seamlessly store documents on the fly."

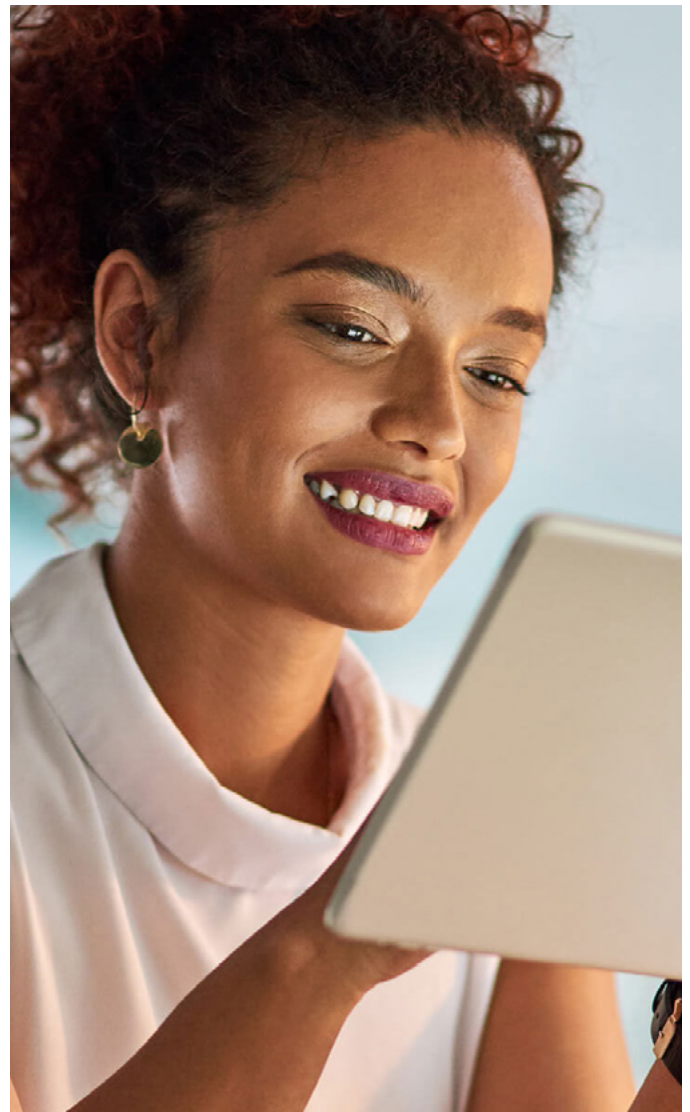
**Ryan Bacon**

IT Manager and Nautilus System Administrator  
Collins Community Credit Union

## Business process automation and integrity

Nautilus brings together people, processes and business rules to create a competitive advantage, operational efficiency and accountability, while standardizing and accelerating work processes. Nautilus Workflow routes documents and work according to predefined rules or ad hoc decisions. It is entirely point-and-click configurable and is easily integrated with other business applications.

Nautilus also enables creation of e-forms to initiate, participate in or complete business processes. Additionally, Nautilus guides users through a process to enable the automatic gathering of data.



## Data across the organization

### Content-enabling applications

Nautilus Application Enabler “content-enables” the transactional software you use every day, such as enterprise resource planning (ERP), customer relationship management, accounting and other line-of-business applications. With the click of a mouse, retrieve content in the Nautilus repository through the line-of-business application interface. Experience immediate access to supporting documents with no changes to your work processes.

Nautilus APIs enable remote or local applications to interact with the Nautilus repository and workflow module(s) using standard protocols.

### Creating a governance risk and compliance framework

Managing the complete lifecycle of business-generated content is key to maintaining corporate accountability and creating a framework for governance, risk and compliance. Those initiatives often rely at least in part on human interaction, which can be difficult to document and automate. In addition to realizing process improvements, users can create a governance framework that provides a front-end view of compliance project management, imposes business rules and consistent policies, and delivers a solid back-end archiving and retention solution.



Workflow is really important to us. Our deposit operations team has been one of the biggest users. It's been a real game changer.”

**Ryan Bacon**

IT Manager and Nautilus System Administrator  
Collins Community Credit Union

Nautilus tracks document activity to manage check-in/check-out transactions and maintain audit trails. Nautilus systematically logs and tests internal controls related to compliance with regulations such as Section 404 of Sarbanes-Oxley. The system's automated processing ensures compliance with company policies and procedures, and manages document retention/purging periods, mitigating risk.



Decrease loan processing times by

**68%**



Reduce costs by **40%** for dispute processing



Cut audit times by **50%** and simplify compliance



Overall efficiency gains of **30%** or more



Onboard new commercial clients

**35%** faster



Reduce accounts payable processing costs by

**60%**

\*Based on analysis of Nautilus user experiences.

## The Nautilus advantage

Nautilus is a cohesive suite of ECM applications designed to seamlessly work together. All Nautilus applications use the same code base, user interface, content repository, and security and administration modules. Deploying a single application suite to meet multiple needs, you will reduce your administrative overhead and training costs, and accelerate system training and adoption.

### Easy to use

New users typically begin working with Nautilus documents after only a few minutes of instruction. You can configure the user interface to meet the specific needs of users across your organization.

### Easy to integrate

Nautilus features an array of low-code automation options to create and manage content and add workflows throughout the enterprise.

### Easy to configure

With point-and-click functionality, any end user (not just programmers) can configure, deploy and modify solutions without being locked into a rigidly coded application.

### Secure, scalable and reliable architecture

Nautilus maintains a high level of security by creating a custom set of product rights and privileges for each user group, backed with powerful security throughout the system.

### Quick and easy to deploy

Nautilus requires little or no custom coding to implement, enabling a rapid return on investment.

### Comprehensive and modular

Nautilus features a scalable but modular architecture that supports department-level installations, enabling delivery of quantifiable results.

### Optimized communication

Nautilus is tightly integrated with account processing, lending, credit processing and other departmental/core solutions from Fiserv. This ensures optimized communications between software platforms and makes Nautilus even more simple, intuitive and efficient to use.



## Transformation at your fingertips

By improving efficiency with Nautilus, financial institutions can lower operating costs and widen profit margins. Savings can be applied toward new tools and channels that members and customers want. Easy access to data and automated workflows enables better customer service and employee satisfaction.

When Nautilus is fully deployed, financial institutions can realize the advantages of a digitally transformed enterprise.

## Connect with us

For more information  
about Nautilus:

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Fiserv is the global technology leader  
at the intersection of finance and  
commerce. Our solutions empower  
financial institutions and businesses of  
all sizes to deliver banking and payments  
experiences that move more than money.

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