

# Electronic Report Management

## What is the Enterprise Report Management software?

Enterprise Report Management (ERM) is a flexible report management engine designed to manage the capture, storage, distribution and retrieval of a credit union's computer generated reports. ERM is a strategic solution for high-speed access to unlimited data regardless of its source.

## What are the benefits of Bluepoint's ERM solution?

The Bluepoint ERM solution captures all text-based reports from any number of systems and processes them into one digital archive accessible across the enterprise.

The system can be configured to automatically index member documents (e.g., statements, notices, or 1099s) and forward them to the appropriate FASTdocs member-centric file folder. Documents can be viewed by date, report type or can be automatically filed in folders within the members' or a department's graphical tree view.

In addition, with permissions, access to any report or member file is available instantly, enterprise-wide. What's more, the ERM system only stores the real document once - regardless of the number of folders it might be 'filed' in - saving storage space!

## What type of information is stored?

ERM provides an environment where computer-generated output such as traditional 'green bar' reports, member statements or 1099 forms, externally generated Payroll or ATM reports, downloaded bank or corporate credit union statements, Access™ database reports, or other text-based reports are captured, parsed, indexed, secured and stored in FASTdocs (Bluepoint Solutions' member-centric electronic filing system). Virtually all system reports from any number of systems can be managed by the ERM module.

## What are the technical specifics of this ERM solution?

ERM server is written as a 32-bit, multi-threaded collection of components designed for performance and scalability. Its architecture allows all of its components to be run on a single NT server or any number of NT servers distributed over a WAN/LAN network. The ERM service monitors output directories and can be instructed to process available report files on a real-time basis.

## Will everyone be able to see ERM reports?

As with all documents accessed through FASTdocs, visibility to reports is predetermined at the time of report configuration. Only those staff members with rights to read a given report will be able to access or view the report.



*ERM makes data retrieval & management quick & easy and available across the enterprise (with permissions).*

## **Can I search for text in a report?**

Yes. Text within a report is fully searchable. For example, if searching for a difference on a given day, your accounting department will be able to search for the amount of the difference to directly locate the most likely cause of the outage. Similarly, your HR generalist can readily search a payroll report to directly access a given employee's accrued sick or vacation time.

## **Does your solution provide high-volume parsing?**

Yes! The ERM parsing engine provides high-volume parsing, indexing, securing, storing, and routing of ERM data. The data reads through the original data, parsing the pages and documents and extracting the necessary criteria to be placed in a relational database. ERM stores, secures and routes the data at the document level.

## **How easy is it to set up reports in this application?**

Very easy. ERM presents an easy-to-use graphical point-and-click report setup that will allow users to define page and row length, regions and summary and line item fields. ERM reports may be previewed prior to being placed into production to verify that both reports and indices are properly defined.

## **Are there any formatting problems when other reports are imported into the ERM application?**

No. ERM employs the powerful features of the ERM processing service as the underlying technology to ensure that reports are managed, stored, indexed, and retrieved in exactly the same format as the documents were processed.