

Director[®]

A Sophisticated Enterprise Content
Management Solution to Transform
Your Business Processes

An enterprise content management solution enables consistent, enterprisewide use and management of information to keep your business operating most efficiently. Director from Fiserv combines document imaging and tracking, email and records management with workflow coordination to increase productivity for your financial institution.

An array of consulting services supports users of the Director suite, which includes more than 30 products to help you manage content and operate more effectively.



New Efficiencies Across Your Organization

1



Comprehensive Capture

2



Flexible Access and Distribution

3



Optimized Workflow

Comprehensive Capture – Scan, import, use and distribute documents and data from a variety of sources, including legacy reports, check images, paper documents, photos, ID cards, applications, email and the web.

Flexible Access and Distribution – Store, organize, protect and share information with immediate access as documents and data are captured by the system. Sharing this data can expedite many financial institution functions, including loan processing, exception handling, credit applications and more.

Optimized Workflow – Automate complex processes and eliminate manual tasks. Create a paperless environment that takes your business processes to a higher level of efficiency.



Document Management

Director puts the most current information at your fingertips. Its proven ability to manage virtually any piece of information or document-based work process makes Director essential for any organization looking to become more efficient and seize emerging business opportunities. Director includes the following document management products.

Director Report Archive

Director Report Archive from Fiserv is a computer output to laser disk (COLD) application. The tool manages the electronic storage of reports, statements, notices and other essential documents with maximum flexibility and control. Automatic indexing and processing, simplified text searches and fast, reliable retrieval make it a key part of an efficient, integrated content management system.

Director Check Imaging

To archive items captured by Deposit Solutions from Fiserv and other remote deposit capture applications, Director Check Imaging from Fiserv saves check-image files and indexes them based on information from posted transactions. That matching process ensures consistent information at all document touchpoints, including Day Two image updates. It also helps ensure the accuracy of an organization's image database and facilitates the virtual elimination of missing check images. The check-image archive is updated daily with decision information on exceptions, such as Stop Pay and No Account on File.

Director Web Access

Director Web Access from Fiserv provides cost-effective, networkwide access to documents electronically archived in Director, including checks, statements and reports. The browser-based convenience of Director Web Access helps improve customer service, boosts productivity and gives your staff more time to build relationships.

Director Unity Client

Director Unity Client from Fiserv provides users with an easy-to-navigate and refreshed interface, allowing them to perform primary job tasks with little to no training. The new interface includes customizable features such as a configurable homepage, personal page and favorites menu, which lets users personalize their view to quickly access the forms and functions they use most often.

Task panes display dynamically and close when not needed. Intuitive ribbon-style toolbars provide quick access to commonly used functions. The interface includes an integrated audio and video viewer, which provides list grouping, sorting and filtering, as well as import previews and batch-scanning capabilities.

Director Document Imaging

Handling paper can be one of the most time-consuming and cumbersome aspects of doing business. Director Document Imaging from Fiserv systematically captures and stores paper documents in standard electronic formats. Converting paper documents to digital images reduces physical storage costs, enables documents to be securely used and shared, and results in faster retrieval of information.

Director Remote Document Imaging

Director Remote Document Imaging from Fiserv is a full-featured, stand-alone scanning application that enables users to scan documents without a connection to a Director server. Printed documents are scanned and converted to digital images using any scanners compliant with TWAIN, Kofax or ISIS. Existing digital images can be imported directly from an electronic storage medium, such as a hard drive or CD, through a process known as "scanning from disk." Scanned documents can later be uploaded to the Director database to be accessed from Director client workstations. Uploads can be scheduled for off-peak hours to lighten the burden on IT resources.

Director Advanced Capture

Director Advanced Capture from Fiserv puts the power of optical character recognition (OCR) to work in organizing your electronic documents. When combined with an accurate and reliable OCR engine, convenient template forms provide the means to automatically classify and index your scanned images. Director Advanced Capture can eliminate the usual indexing bottleneck associated with document scanning because OCR-based classification and indexing are faster and more reliable than manual data entry.

Director Full-Page OCR

Director Full-Page OCR from Fiserv recognizes and translates printed alphanumeric characters on a scanned document image and converts it into a machine-readable text document for efficient searching and indexing. Creating text renditions of image documents makes it possible to use text searches to find a particular document and specific content within a document.

Documents commonly processed this way include business correspondence, legal memoranda, contracts and loan documents.

Director Full-Text Search

Director Full-Text Search provides a simple, unified interface to retrieve textual information stored in Director documents. Conduct advanced searches using keywords and phrases to quickly and easily locate relevant content within images, emails, PDFs, Microsoft Office files and electronic forms.

Director Virtual Print Driver

This solution eliminates the cost of printing and scanning hard copies of documents based on Microsoft Windows®. Director Virtual Print Driver from Fiserv appears as a standard printer available within Windows applications. Any printable document, including ones found on the web, can be imported by virtually printing into Director. Director Virtual Print Driver creates a read-only document image and stores it securely in Director as a multipage TIFF image.

Director Document Packets

Director Document Packets offers the ability to generate a single PDF document from multiple source documents, all within Director. A predefined package template can include a dynamic header, footer and table of contents. Before the package is finalized, documents and pages can be rearranged, duplicated or removed from the final output, offering run-time flexibility and a high level of customization. The resulting packet is indexed and uploaded into Director where, just like any other Director PDF document, it can be edited, routed and shared using existing processes.

Director Document Import

Designed for the archiving of documents and images generated by third-party applications, Director Document Import from Fiserv enables your organization to transfer large numbers of files and related indexes into Director. Performing large back-file conversions from legacy systems works especially well with this solution.

Automatically import, classify and index high volumes of documents, regardless of electronic file type. Powerful configuration and flexible scheduling options allow Director Document Import from Fiserv to import from any text-formatted index file and perform unattended processing during off-peak hours.





Business Process Automation

Managing business processes more effectively can help your organization increase its productivity and profitability. Using the following tools, your team can complete work more efficiently and accurately compared with paper processes.

Director Outlook Integration and Director Mailbox Importer

With Director Outlook Integration from Fiserv, use Microsoft Outlook® to access documents in Director and attach them to emails. Organizations can also easily archive and index emails and attachments into the system.

Director Mailbox Importer from Fiserv automatically stores and indexes emails and attachments in Director. For example, use Director Mailbox Importer to identify and archive incoming loan inquiries and then populate Director Workflow from Fiserv to continue the process – all without manual intervention.

Director Office Business Application

Director Office Business Application from Fiserv provides users of Microsoft Word®, Excel® and PowerPoint® with single-click menu access to store, retrieve and edit Director content without leaving their primary Microsoft Office® applications. The result is an easy-to-navigate interface that extends the powerful functionality of Director to Microsoft Office. Director Office Business Application is available in versions compatible with multiple releases of Microsoft Office.

Director Version Control

Many documents used collaboratively in your organization, including word processing files, spreadsheets, presentations, forms and images, are created in third-party applications. Director Version Control from Fiserv saves and coordinates multiple versions of those documents for maximum flexibility in electronic document management.

Director Efficiency Manager

Director Efficiency Manager from Fiserv incorporates tracking of documents and tasks, similar to case management, to streamline departmental processes and help make the enterprise more efficient and profitable. The preconfigured applications within the solution leverage a common technology framework, deliver a familiar interface to your knowledge workers, more effectively maintain compliance, and efficiently manage risk by streamlining enterprise onboarding, maintenance, quality and tracking tasks.

Director Workflow

This application enables your team to electronically route, track and perform tasks on essential documents in human resources processing, accounts payable, regulatory compliance and other functions. Documents once carried manually between departments and branches are delivered electronically in seconds. Streamlining the transmission of such documents and automating the processes they support accelerates the completion of critical business tasks. You can also configure timers and email alerts to notify your staff of tasks that need to be performed. Director Workflow can be readily adapted to the needs of your financial institution by designing your own custom workflows. Or, use one of the ready-made workflows that come standard with Director Workflow, such as Director Workflow: Accounts Payable from Fiserv.

Director Workflow: Accounts Payable

Director Workflow: Accounts Payable automates common accounts payable tasks so you can electronically capture, route and track invoices and other documents for maximum accuracy and efficiency.

Director DocuSign® eSignature Interface

Director DocuSign eSignature Interface from Fiserv enables users to digitally sign Director documents from anywhere through access to the internet, ensuring their authenticity and integrity. Easily manage the signature cycle by packaging documents, securely sending, collecting the completed documents and storing after approval. Obtaining signatures can be further automated using Director Workflow to electronically facilitate and track the process.

Director Signature Pad Interface

Director Signature Pad Interface from Fiserv integrates with Topaz Signature Pad devices to enable users to sign image documents and electronic forms in real time within Director. Physical signatures can be used to verify the accuracy of information on a document, signify adherence to a policy and many other purposes. Signatures are permanently “burned” onto the document to provide an unalterable record of the captured signature.

Director Process Automation

Using Director Process Automation from Fiserv, common tasks that have been performed manually, such as statement generation and check processing, can now be automated for faster throughput and greater accuracy. Any process consisting of a series of steps or complex actions can be set up to run automatically and in the correct sequence. In addition, each step can be configured for a variety of possible operator responses, providing multiple potential channels for each process. The system can also be configured to send an email alert to the system administrator if a process is unexpectedly interrupted.

Director Document Distribution

Director Document Distribution from Fiserv delivers secured electronic statements and other communications to selected accountholders through the web, email, fax, CD and DVD. Attach a customized email, cover letter or promotional document to the statement and send a copy to another recipient. Accountholders choose from several delivery options and can enroll online if using Director Document Distribution in conjunction with your internet banking solutions. Save paper, postage and labor while providing accountholders with greater convenience and choice.

Director Document Tracking

Director Document Tracking from Fiserv automatically tracks each document associated with an account or service, keeping the account current, and saving staff time and effort. For example, if a document, such as proof of insurance, is missing or has expired, the solution triggers an alert. Or, if a renewal notice for a CD is due soon, Director Document Tracking notifies your staff to take action.



Compliance Tools

Risk management and regulatory compliance touch every part of a financial institution’s operation, from the teller line to the executive suite. Everyone in your organization shares responsibility for compliance. Director assists in this critical area with solutions that keep your electronic content secure while facilitating compliance with government regulations.

Director Records Management

As your financial institution grows, so do the informational assets you create. Director Records Management from Fiserv supports compliance with regulatory standards for retention and management of electronic documents, and helps ensure the proper disposal of documents that no longer need to be retained. Check images and reports, for example, can be automatically purged from the Director system after a predefined retention period. The powerful Director foldering interface enables you to organize documents into managed folders and assign a specific retention plan to each folder. Use this solution to track the life cycle of all records, from document creation to final disposal.

Director Publishing

Director Publishing from Fiserv provides a self-contained, portable version of the Director suite to enable accountholders to view and retrieve specific information from their computers using CD or DVD media. This limited version maintains document integrity and security while supporting the functions for document retrieval, cross-referencing, text search and printing within Director.

Director Publishing Encryptor

Director Publishing Encryptor from Fiserv enhances the security of publishing Director information to CD and DVD media. Encryption makes the contents of the disk meaningless without a proper password, preventing sensitive data in the disk groups and database file from being viewed by unauthorized users.

Third-party publishing solutions that use Rimage® units in conjunction with the Director Automated CD Authoring from Fiserv and Director Automated DVD Authoring from Fiserv applications can also deploy Director Publishing Encryptor to safeguard automatically generated media.

Director Data Encryption

Director Data Encryption from Fiserv enables permanent encryption of alphanumeric keywords and documents that reside within your Director disk groups. This solution can encrypt keywords, such as an accountholder's name and tax ID number, the instant they are stored in the Director database. If someone attempts to access encrypted keywords outside of Director, the data is unreadable. When an authorized user of Director accesses encrypted keywords, temporary decryption occurs and the information can be viewed. For extra security, the Director administrator can mask encrypted keywords so designated users can see the last four digits of the ID number.

Director Document Knowledge Transfer

With Director Document Knowledge Transfer from Fiserv, you can rapidly distribute content to employees throughout your organization. The solution helps ensure written materials critical to job roles, procedures and protocols, such as an updated code of conduct, are read and acknowledged by all affected individuals. The capability can also be used effectively to support regulatory compliance strategies.

Director Secure Image Presentment

It's vital to keep sensitive accountholder information secure, especially in light of increasing identity theft. Director Secure Image Presentment from Fiserv enables financial institutions that license the Director Check Imaging application to mask sensitive areas on check images when they are printed during the statement-rendering process. The solution also masks check images when viewed from Retail Online™ and Business Online™ from Fiserv, giving your accountholders an extra measure of security.



Executive Reporting

Director supplies powerful information about the content stored in the system and helps you evaluate how effectively your organization is using it. With the following reporting applications, your organization can glean critical insights to help make the most of your Director investment.

Director Reporting Dashboards

To help you use Director to its full potential, Director reporting dashboards provide your organization with real-time visibility into system and process performance, license usage and more, in a variety of graphical formats including charts, graphs, scorecards and maps. Users can create and share dashboards – highlighting the business data that is most important to them – on their own, without the need to engage IT resources.

Director Mobile Access Android, Director Mobile Access iPad and Director Mobile Access iPhone

Decrease overall processing time and increase productivity by keeping Director at decision makers' fingertips. These solutions provide employees with convenient access to Director documents and processes through Android, iPad® and iPhone® mobile devices. You retain full administrative control over what's accessible and by whom. Traveling executives and managers can make immediate approvals and route decisions without relying on phone calls or email or spending their limited time accessing a computer.





Get the Most From Your Investment With Support and Services

Fiserv offers service and support options to maximize the benefits of Director. From installation and staff training to day-to-day system management, a range of services are available to help you optimize your technology investment.

Technical Services

Whether your organization is installing Director for the first time or expanding your capability with new modules, Fiserv offers a variety of installation services. A popular option is remote installation through the internet, which facilitates efficient and secure software installation.

Advanced Support Solutions Provide Immediate Answers

Reliable and effective software support is as important as the quality of the product itself. That's why Fiserv experts are on the job and equipped with the latest problem-solving technologies to assist your operations staff. For convenient, self-service support, our internet-based solution offers unlimited access to thousands of common questions and answers.

Education Services

Choose from a variety of teaching methods to train your staff, including classroom instruction and customized training at the location of your choice. We also offer live and recorded online classes.

Advisory Services

Working directly with your organization, our consultants draw on their broad financial services expertise to ensure you are maximizing your technology investment. We collaborate with you to understand your needs, operations and processes, and identify areas of opportunity to help ensure the most efficient and effective deployment.




Director: Designed for Efficiency and Productivity

- Director Remote Document Imaging is a full-featured, stand-alone scanning application that enables users to scan documents without being connected to a Director server
- With Director Outlook Integration, you can use Microsoft Outlook to access information stored in Director. View documents and attach them to emails for easy delivery
- Documents once carried manually between departments and branches are delivered electronically in seconds
- Common tasks that have been performed manually, such as statement generation and check processing, can now be automated for faster throughput and greater accuracy using Director Process Automation
- Using reporting applications, glean critical insights to help you make the most of your Director investment
- Director Mobile Access provides your employees access to Director documents and processes at their convenience through Android, iPad® and iPhone® mobile devices



Connect With Us

For more information
about Director:

 800-872-7882

 getsolutions@fiserv.com

 [fiserv.com](https://www.fiserv.com)

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 [fiserv.com](https://www.fiserv.com) to learn more.