



## REPORT MANAGEMENT

### Benefits of Clearview

- ❖ Electronically store, secure, and manage reports, statements, invoices, policies, and all other types of business application generated content. Reduce paper printing, courier, and distribution costs.
- ❖ Quickly and easily access critical information from your desktop.
- ❖ "OnDemand Audit" functionality takes the complication out of compliancy—every single process in Clearview is auditable.
- ❖ Easily and confidently adapt to the changes that will inevitably occur in your organization.
- ❖ Improve Customer Service response time and service levels. Set new standards in your competitive market.
- ❖ Be the first to know—visible alerts and system-generated reports notify information workers of missing and compliance-related reports.

*"Over the years, our previous product performed well for us. Then we saw the new Clearview Content Management solution...we knew we needed to make a change. The technology design and ease-of-use has brought increased efficiency throughout the bank.*

*There is nothing on the market like it."*

**Henry Steffen**, VP of Operations  
Bluestem National Bank

Clearview Report Management delivers the industry's most advanced Report Management (COLD; Computer Output to Laser Disk) solution. Clearview enables you to electronically capture and store business content such as reports, statements, and invoices that are generated by your core business applications. Once your reports and computer-generated documents are stored and managed by Clearview, your organization can improve the quality and accuracy of your business decisions and workplace productivity, streamline process efficiency, enhance your compliance or governance initiatives, and achieve unparalleled levels of Customer Service.

### Values and Benefits

With Clearview, you have the power to reduce costs and increase your organization's agility in today's demanding business environment.

#### EXTREME PERSONALIZATION FOR INCREASED EFFICIENCY

With a wide range of intuitive report organization options, such as My File Cabinet, My Work Folders, and My Active Reports, information workers can interact with electronic report data the same way they would with their paper-based reports—but without the burden of manual filing and storing—thereby streamlining their daily activities and eliminating redundant tasks.

#### SIMPLE, STREAMLINED SYSTEM ADMINISTRATION

Clearview has the most powerful and flexible System Manager module on the market. With Active Directory Integration capability, System Administrators have the option to maintain a single set of user profiles on their network, or maintain individual organizational unit, group, and user records within Clearview.

Simple drag-and-drop functionality, and the ability for new and existing information to be quickly added or modified, makes system administration updates and maintenance a breeze. Furthermore, System reporting, auditing, and usage tracking enable System Administrators to easily monitor for maintenance and security purposes.

#### ELIMINATE COMPLIANCE, AUDIT, AND EXAMINATION HEADACHES

The advanced audit and tracking capabilities in Clearview are designed for today's compliance and regulatory-sensitive business world. Every single system and user operation in Clearview can be audited—that's the Clearview difference.

#### UNPRECEDENTED REPORT CLASSIFICATION AND INDEXING

As your organization grows and evolves, so does the way you classify and index your reports. With years of Report Management expertise, Clearview delivers the most advanced Report Management (COLD) solution available in today's market.

Leveraging XML and Microsoft® SQL Server™ 2005, Clearview has the highest level of agility in how your reports are categorized and indexed. Unlike legacy systems, Clearview enables you to reclassify or re-index historic reports in a matter of minutes.

To learn more about Clearview,  
please visit [www.clearviewecm.com](http://www.clearviewecm.com)

# Changing the way you see Enterprise Content Management



## Solution Features and Highlights

### MY ACTIVE REPORTS AND MY SUBSCRIPTIONS

Automatically present information workers with the reports they need on a daily basis, thereby eliminating repetitive and time-consuming searches. Optional email alerts can be issued when reports are ready to be viewed.

### MY SAVED SEARCHES

Enables information workers to save their searches so they can quickly retrieve report data again and again. Either a list of the search results or the entire content may then be emailed, exported, or printed on demand.

### MY FILE CABINET AND MY WORK FOLDERS

Provide information workers with a quick and easy way to access *allowed* reports and files they need on a regular basis, through their very own, customizable, electronic file cabinet and corresponding work folders.

### RELATIONAL SEARCHES

By identifying the relationship between various index values, Clearview quickly locates reports that meet a diverse set of search criteria (i.e., range of account balances and transaction types) from a single, simple search.

### ONDEMAND AUDIT AND EXECUTIVE REPORT REVIEW

Exceed audit and compliancy requirements with real-time audit reports targeting specific system operations, time spans, or user activity. Furthermore, managers can use Clearview to review and sign off on required reports electronically and provide a history to auditors to eliminate paper waste and storage, and maintain high security standards.

### ENCRYPTED CONTENT REPOSITORY

To deliver the maximum level of secured content within an organization, an optional encryption module can be employed to securely encrypt each content object introduced and managed in the Clearview native repository.

### INNOVATIVE USER EXPERIENCE WITH CLEARVIEW CLIENT INTERFACES

Information workers can utilize the new, feature-rich Windows Clearview Client with an advanced ribbon interface similar to Office 2007, or utilize the newly designed Clearview Web Client to access content and functionality in a highly intuitive thin client application. Additionally, the optional Clearview *Iriss* Desktop Gadget provides the ultimate user experience with ease of use and personalization. No other ECM provider delivers a wide and varied selection of next-generation user interfaces designed to maximize information worker productivity.

## How to Contact Us

### Clearview Software

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## About Clearview

Clearview is the premier innovator of next-generation SharePoint-based Enterprise Content Management (ECM) solutions designed for today's demanding business world. Our leadership team combines years of experience with the latest Microsoft technology architecture and innovation to bring to market a new standard of excellence for ECM solutions, services, and Customer care.

To learn more about Clearview,  
please visit [www.clearviewecm.com](http://www.clearviewecm.com)



ISV/Software Solutions  
Information Worker Solutions  
Data Management Solutions