



# LOGICAL ACCESS

Electronic Document  
Management System



Cover the complete document lifecycle in a secured environment

FNZ is the **global platform provider** in the wealth management sector, partnering with over 650 of the world's leading financial institutions and over 8,000 wealth management firms.

With over 4,500 employees in 21 countries, FNZ's mission is to open-up wealth, empowering all people to create wealth through personal investment, aligned with things they care about the most, on their own terms.

At FNZ, we leverage our extensive experience in wealth management, **reinventing ourselves to innovate and adapt** to an industry in evolution and facing structural challenges:

-  Heavy and paperbased workflows increasing manual tasks and operational risk,
-  Increased constraints on regulatory compliance (GDPR/DPA...),
-  Constant margin erosion and increased competition deteriorating levels of commissions and fees,
-  Client expectations for digitization including document availability and processing.

Our **award winning solutions** are made for private bankers and wealth managers to enable them to **turn these challenges into opportunities**.

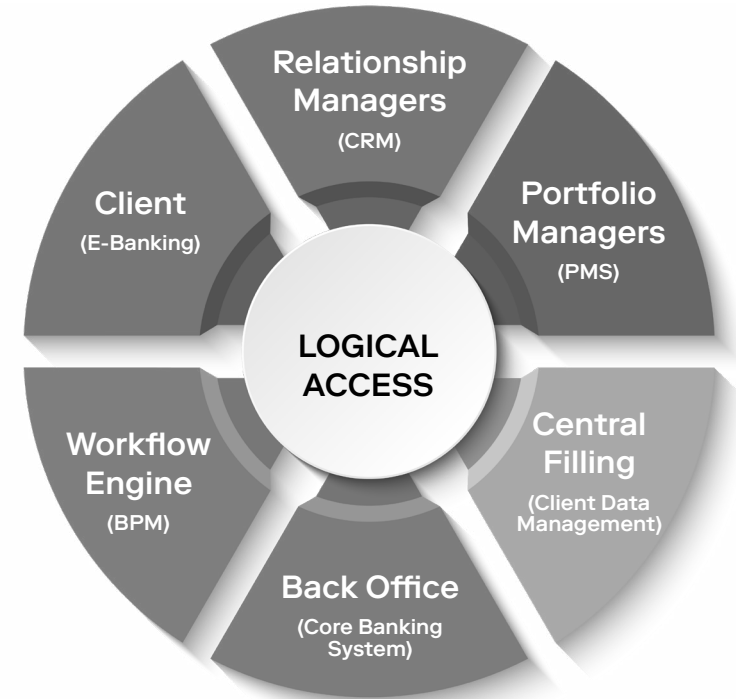


Cover the whole document lifecycle through a centralized and secured management system



FNZ **Electronic Document Management System** allows private bankers and wealth managers to streamline their processes as document handling is key in any workflow.

Compatible with any third-party vendor, Logical Access is also **fully integrated with FNZ solutions** and provides the full value chain with its document management features whether it is broadcasting, generating or storing:



**FNZ solution**

FNZ' Logical Access is a secured document management and archiving solution specifically designed to meet private banking and wealth management industries needs.

regulations and the immediate availability of documents are increasing trends that justify the choice of an electronic archiving solution, enabling banks to efficiently manage these conformities and governance projects.

It is a cost effective way to enhance customer satisfaction through **rationalization of document handling**. Indeed, the strengthening of banking

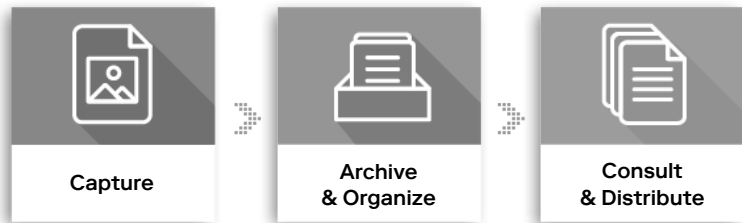
Logical Access allows you to **capture, organize, archive and deliver** a large volume of documents and content by covering the **complete document lifecycle** in a reinforced security environment.

The solution enables relationship managers to manage all the files used in daily banking processes through an **Electronic Document Management System**, positioning itself as a key element to the banks' approach towards client-centric and KYC strategies.

Specifically designed for the private banking and wealth management industry, the solution is also designed to meet all aspects of regulatory constraints and documents are accessible immediately by authorized users through strong **access rights management**.

### Document lifecycle

Logical Access solution allows private banks and wealth managers to have full control over each step of the document lifecycle:



**Capture**  
Supports any document type: images, spool files (data flow), PDF, Microsoft® Office and office documents.

**Archive & Organize**  
Supports all types of users inside the bank and handles all documents across the bank's processes including central files.

**Consult & Distribute**  
Speeds up workflows, while increasing employee's productivity, centralizing client data, ensuring document security and reducing document loss.

## Integration

Logical Access is an n-tier solution integrating easily with your existing **in-house or standard Core Back-Office system**. Its scalability allows the management of large amount of documents with an unlimited number of users.

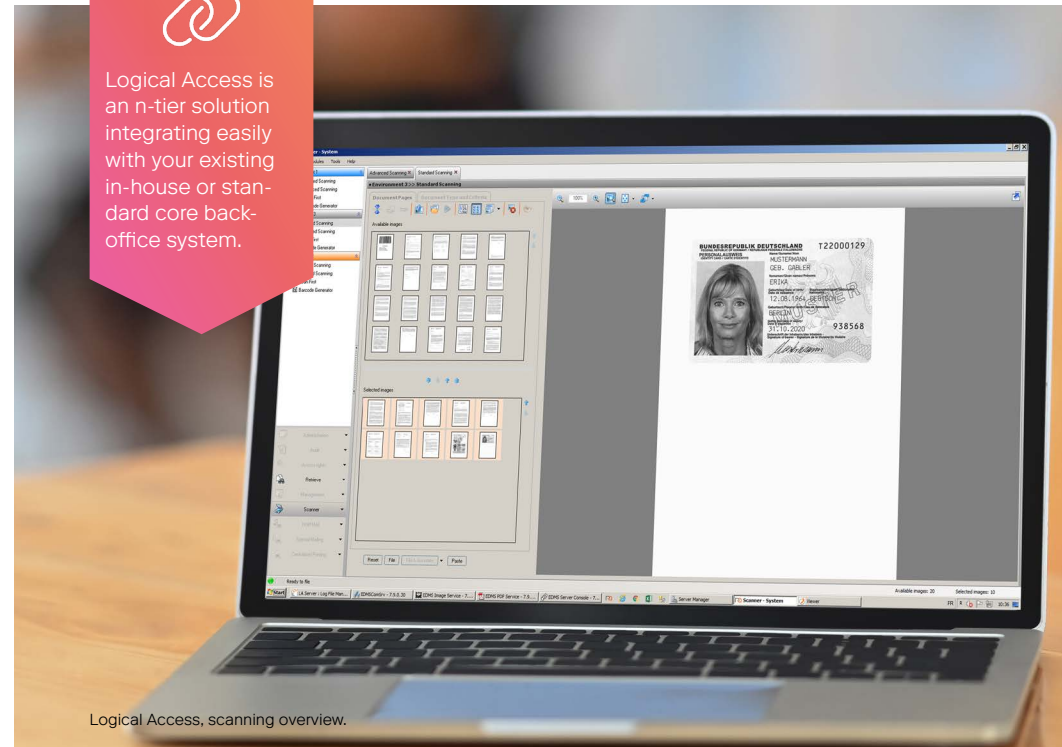
The solution is available within a **desktop or web based environment** allowing connectivity and integration to any third party applications through an API.

## Key benefits

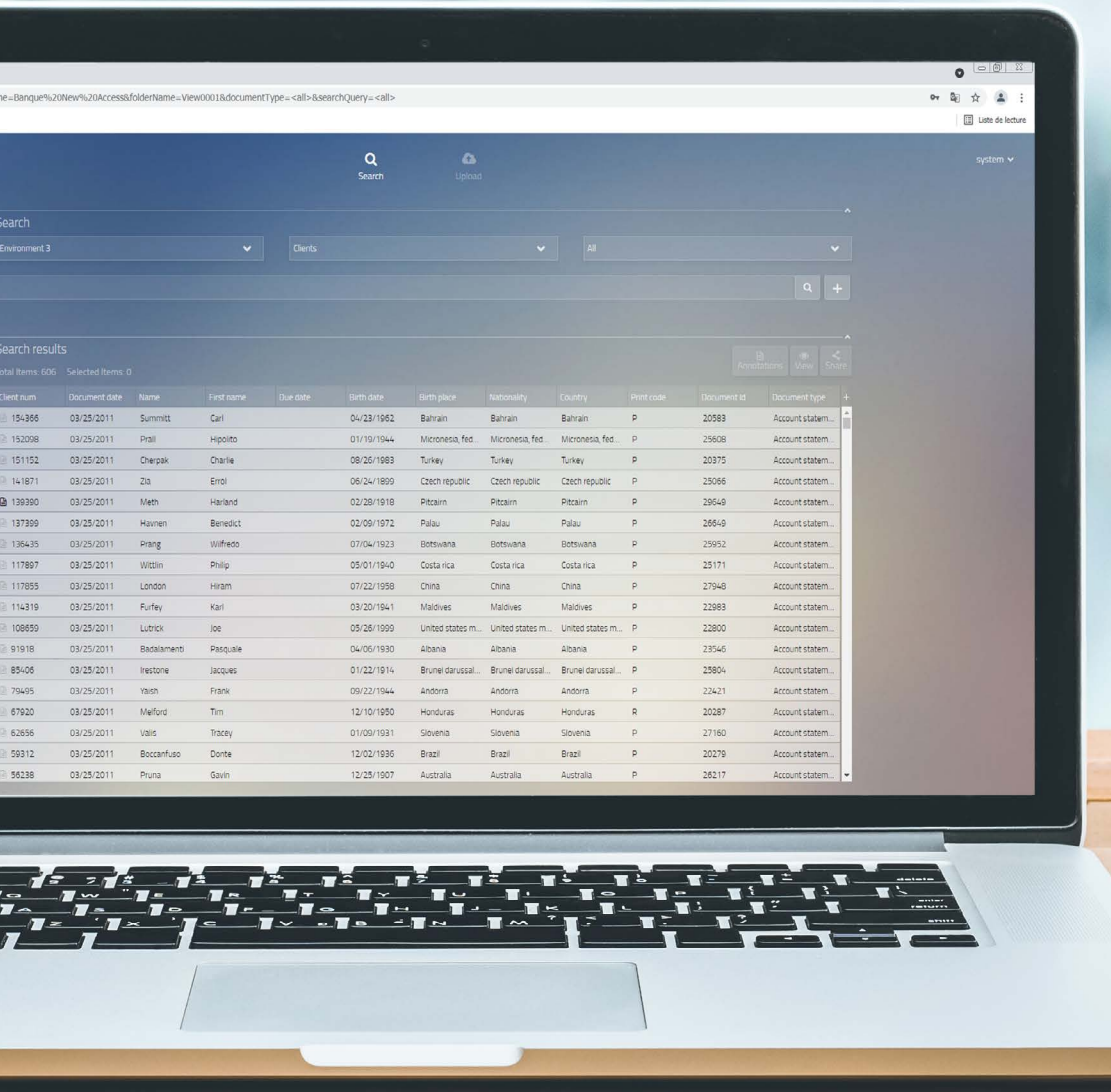
- **Optimization** of the solution which reduces the operational cost through rationalization of document management and internal processes automation increasing employees' productivity.
- **Flexibility** in adapting to changing business needs through modularity and scalability of the application, and configuration to meet various requirements in terms of organizational structure or security.
- **Security** guaranteed by a complete control over the document lifecycle, aligned with data security standards. Documents are protected against loss and accidental damage including external corruption (hacking).
- **Enhanced** customer services through connectivity to third party applications.

Logical Access modular approach offers a highly configurable and multi-language graphical user interface, which can be adapted to the bank's needs.

Logical Access is an n-tier solution integrating easily with your existing in-house or standard core back-office system.



Logical Access, scanning overview.



Logical Access web portal overview (left page),  
filing plan overview (right page).



## Document capture

- Automatic and manual archiving
- Scanning / mass scanning / history (OCR, barcode)
- Back-Office connection
- MS Office and Adobe Acrobat plug-in
- Document generation



## Archiving /organization

- Any type and nature of document
- Relational Meta Data management
- Configurable filing plan
- Document access rights controls
- User/Profile access rights definition
- Advanced security controls
- Activity tracking



## Distribution

- Quick, simple and advanced search based on documents Meta Data
- Full text search
- Virtual document
- Dedicated banking mailing printing (Hold Mail, Client Mailing, Mass Printing)
- Compatible with automatic mail packing systems
- API capability



## Security & User rights

- Documents accessible to authorized users
- Strong user / profile access rights definition
- Audited & traceable users actions (from login to logout)
- User rights and authentication
- Document and data encryption
- Digital signature (including timestamp)
- Document blurring /masking
- Smart card control
- Secured document consultation
- GDPR Compliance



## Web portal

- Available in a web browser
- Document meta data based advanced search
- Direct document archiving from the web page





Request a demonstration, ask a question  
or book a call, we are available for you:

✉ [info@newaccess.ch](mailto:info@newaccess.ch)

☎ +41 (0) 58 822 92 00

More information on our webpage:  
[www.newaccess.ch](http://www.newaccess.ch)

---

#### FNZ Switzerland offices

##### Winterthur

FNZ (UK) Ltd  
Bahnhofplatz 17 8400  
Switzerland

##### Zurich

Lessingstrasse 5  
CH-8002 Zurich  
Switzerland

##### Locarno

Piazza Grande 15  
6600 Locarno  
Switzerland

##### Geneva

Route de Pré-bois 17  
1215 Genève 15 Aéroport  
Switzerland

##### Zurich

Schanzeneggstrasse 3  
8002 Zürich  
Switzerland

##### Geneva

Rue du Cendrier 17  
CH-1201 Genève  
Switzerland

##### Chiasso

Corso San Gottardo 107  
CH-6830 Chiasso  
Switzerland

Always by your side, we serve  
our + 650 clients in more than  
21 countries





Wealth's growth platform

[FNZ.com](https://fnz.com)