client reporting with **perfect form** and **function**

VERMILION

specialists in client reporting

The nature of client reporting is changing.
The demands have never been greater.
And the need to produce high quality reports
accurately and efficiently, never more pressing.

shaping the future of **client reporting**

Client service is key to client retention and business growth. Successful Financial Services companies must constantly exceed the expectations of expanding client bases in every aspect of the service they offer.

Key Benefits

User empowerment
Complete business-led solution
Single point of access to all corporate data
Consistency of data and formatting
Reduction of errors and re-working
Powerful customisation and branding
Advanced commentary facilities
Package tailored for each implementation
Automated, pro-active workflow
Sign-off throughout the process
Multilingual document output
Marketing quality output
Scalable
Flexibility
Rapid ROI

With client reporting this means creating increasingly personalised documents, presented to ever-higher professional standards and incorporating sophisticated text and graphical content. At the same time, there's a corporate responsibility to reduce production costs, IT department reliance and meet complex regulatory requirements. It's a tall order.

What's needed is a totally fresh and innovative approach. A client reporting solution that's in tune with today's business necessities but has the flexibility to adapt as circumstances change. A system that gives you greater process control, allows you increased report input, reduces errors and requires less resource to operate. And, of course, a system that delivers consistent, marketing quality reports in the correct format at the right time.

The future of client reporting has now arrived with the Vermilion Reporting Suite.

At last there's a single solution that uniquely addresses modern client reporting requirements. The Vermilion Reporting Suite (VRS) consists of four key elements that integrate to become the most powerful reporting system ever created.
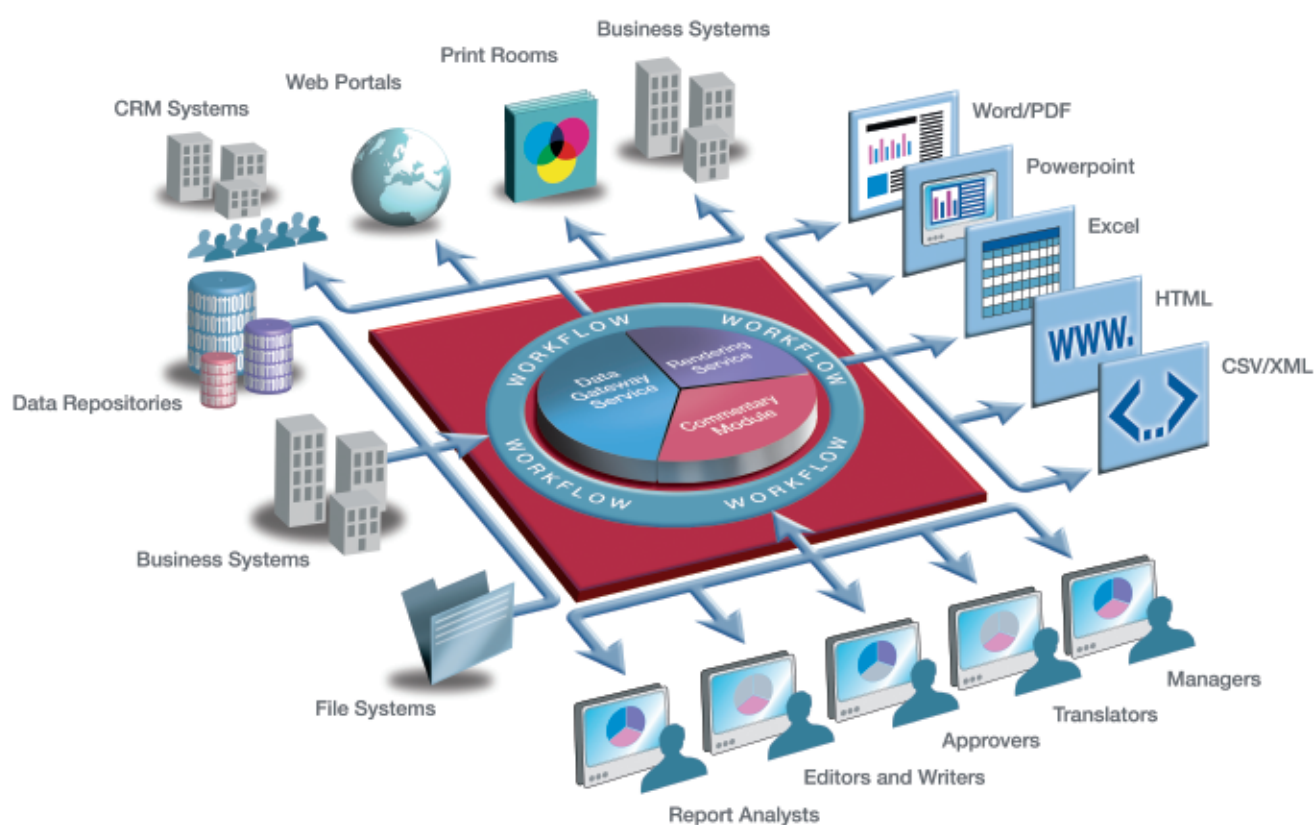
Vermilion Reporting Suite

Data Gateway Service

Invariably, data in various formats needs to be drawn from a multitude of disparate sources. Our Data Gateway Service (DGS) enables most forms of information to be securely extracted from almost any origin, then validated and manipulated. Data snapshots can be viewed at specific times during the process when required.

Rendering Service

This service compiles all your report content into page layouts ready to output a premium quality finished document that adheres to your company's corporate style and branding guidelines. It takes care of pagination, headers/footers and footnotes, and allows complete content personalisation for individual reports.

Workflow Service

Our unique, powerful, integrated Workflow Service automatically manages the entire production process so that all necessary tasks are correctly completed on time. It works out what needs to be done and when, prompting for approvals as these are required and distributing tasks to ensure deadlines are met, escalating where appropriate.

Commentary Module

Content contributors can enrich your reports by adding commentary that's personalised to individual clients. But, with an integral intelligent filtering system, if the same content is appropriate for multiple clients it can be easily re-used, without being re-typed, to deliver a uniform message. The module facilitates approval from all relevant parties so that quality is consistent and compliance standards are met.

Everything **falls in to place**

Data Gateway Service

Information access and retrieval is critical to the effectiveness of any client reporting system. Without accurate data, the integrity of the finished document is seriously compromised.

However, extracting this information can be a time-consuming and difficult task, particularly when it may exist in numerous locations and stored in a variety of formats. Mining such data invariably involves significant IT department input and can lead to an inefficient use of resources. Our Data Gateway Service (DGS) provides a single, secure access point for the retrieval, filtering and processing of information from both inside and outside your organisation creating a virtual warehouse for all your data.

With an interface designed to make this process as straightforward as possible, data consistency and accuracy are assured through validation and sign-off procedures.

Let it **flow**

Workflow Service

At the heart of VRS lies the Workflow Service. It's a powerful pro-active manager that helps integrate the core product elements and makes sure the entire production process works to deliver the correct output on time.

Key Benefits

Process management through automation

Pro-active and intelligent

Report deadline driven

Task generation and distribution

Data and report sign-off control

Problem escalation

Priority sensitive

Because it's client obligation driven, workflow understands exactly what's required for VRS to complete a report to meet your deadline and it has direct access to the users and system components whose input and actions are required for successful delivery. And it's dedicated to doing just that. This automated system has the intelligence and capability to automatically generate prompts and reminders for users who have outstanding tasks or sign-offs and the ability to escalate problems to team members or managers should this become necessary.

Whatever it takes to get the job done, workflow will do it.

Never **lost for words**

Commentary Module

With quality data at your fingertips, the VRS Commentary Module, which is an integral part of DGS, allows your writers, analysts and editors to add meaning and interpretation directly into reports using rich text input.

Key Benefits

Write commentary once, use many times

Automatic re-use across multiple clients

Intelligent filtering system

Rich formatting

Multilingual capability

Built-in approval facility

Resource efficient

Secure access

It's a vital function that adds output value and clearly differentiates your organisation in a highly competitive market. With our unique templates, it's as easy to achieve totally personalised documents for individual clients as it is for groups or an entire customer base. The ability to automatically re-use sections of commentary in many different reports without the need to constantly re-input saves valuable time and reduces the likelihood of errors. And with in-built authorisation and approval procedures, you can be sure of maintaining high quality and accuracy as well as meeting legal requirements.

Superior results, **page after page**

Rendering Service

Having created your desired content, the Rendering Service prepares documents for output. Commentary, imagery, tables, charts and graphs are compiled into pre-defined, re-usable templates linking to sources in the Data Gateway Service.

User friendly, point, drag and drop technology delivered through web-based screens make report population quick and easy. Content is automatically personalised and corporate style and branding consistently applied to each template in a process designed to minimise errors. Documents can be produced in all the most popular file formats including Word, PowerPoint, PDF, HTML, XML, Excel and CSV. No matter what format, the results are always stunning.

Our credentials **stack up**

Vermilion

We're an independent company established in 2003 and based in London. Our senior management team has, between them, over 60 years of hands-on experience working in the client reporting environment, so we've a deep understanding of the issues and challenges you face.

The Vermilion Reporting Suite has been designed as the direct result of personal experience in working with business practitioners and realises the essential elements needed to create the ultimate Client Reporting system. More than 5,000 man days have been invested in developing an optimised world-class solution. A solution that focuses on data capture, personalisation, compliance, branding and automated workflow with built-in approval – all ensuring maximum client added value at minimal total cost of ownership.

In short, no other client reporting solution can match it.

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