

Docugate

Professional Document Output
for efficient, automated processes.



Docu**gate**®

Leuchter
IT SOLUTIONS

Efficient standard solution for Finance and Insurance sectors

Facts on Docugate

General:

- Reliable standard solution without overkills
- Individually adaptable to customer needs
- “Named user” licensing, no CPU dependence
- Fully automated data transfer and pre-selection from external systems

User:

- Simple, intuitive, high usability (working within Microsoft Office environment)
- Completed single and multi document creation
- Manual intervention or user input in the document are completely unnecessary
- If necessary, easiest reworking of created documents using the provided Office toolbar and Docugate “Task Pane”
- Automated filing into DMS

Administration:

- May be managed by yourself, no dependency on software suppliers
- Support tools for template creation such as “Form Designer” and “Field Dropper”
- Simple extensibility (fields / templates) via “Mapping Toolbox”
- Integrated “Text Module Management”
- Versioning of text modules
- “List Generator” for the generation of simple or complex listing (customer, account, credit information)
- One-Click-Configuration (snap-ins, functions, text modules, metadata)

- Reuse of key modules, snap-ins and functions – centralized and decentralized management of templates and resources
- Release control for productive use of templates
- Integrated test environment, no need of building another physical environment
- Role-based “Admin Tool”

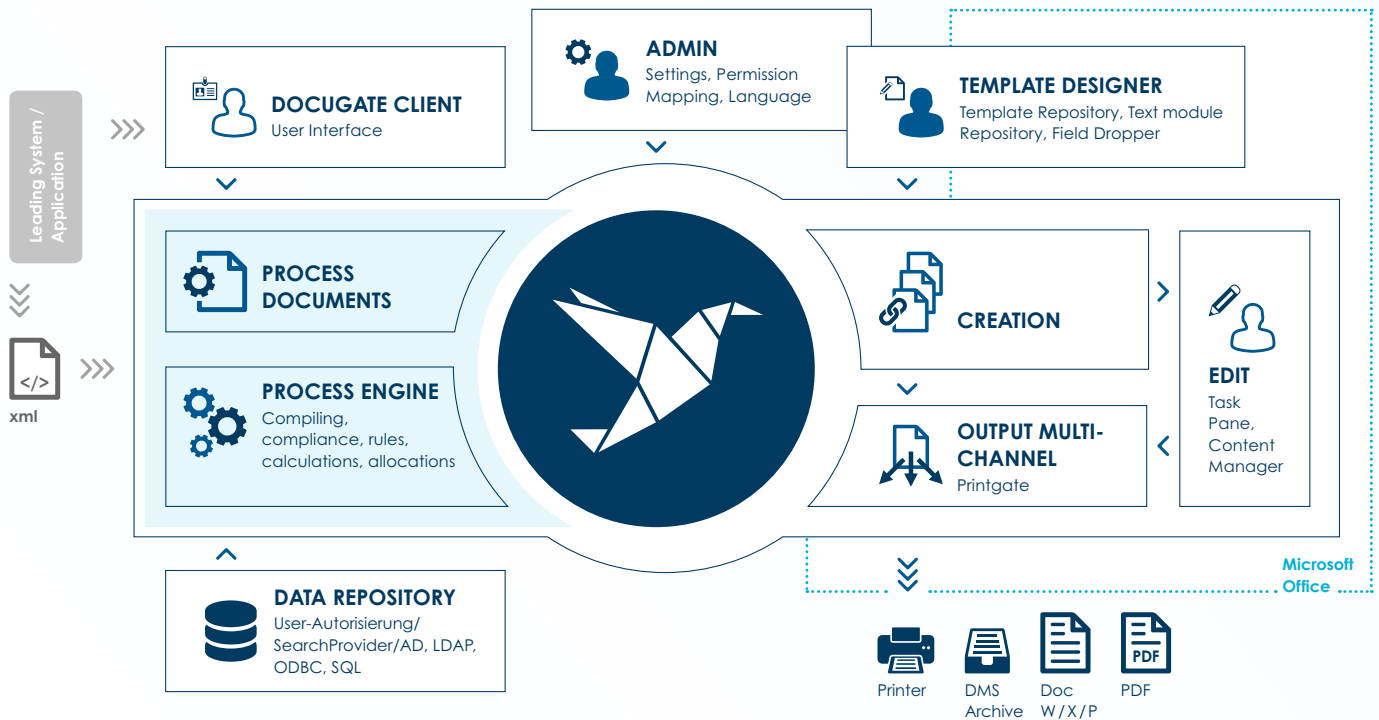
Technical:

- Any XML format readable out of Leading Application
- Input validation
- Use of open standards such as open XML
- “As a Service” applicable (Client Onboarding)
- Authorization allocations for document creation and administration
- Rule-based release of data sources per user
- Simple infrastructure

Costs:

- Low licence and infrastructure costs
- Reduced management costs for IT, marketing, divisions, templates
- Reduced costs for document creation, since quick, efficient and of high quality

The innovative, cost-effective solution providing automated complex, individual document creation processing.



The individual document output is still a major challenge for efficient and cost-effective implementation of most various, complex requirements in the business process. With Docugate we have focused on and specialized in this complex document creation process. Docugate distinguishes itself by the simple and smooth integration to core system applications as well as to Microsoft Office applications. Due to the standardized and extended XML interface, Docugate can be connected to any external system. Complex process documents and forms such as account opening, credit counselling, quotations etc. are implemented very easily and standardized with various tools such as “Process Document Mod-

ule”, “List Generator”, “Barcode Creator” etc.. The document creation process is fully automated. Manual intervention by the employee in the generated document is no longer required. CI/CD and compliance are thus ensured and the highest document quality is guaranteed. In providing templates, the administrator will be led by Docugate. Layouts and complex forms can be created very easily with “Form Designer” or Microsoft Office applications. For all these functions no programming skills are required.

Centralized in one portal: Template Management, Process Management, Output Management and ensuring the CI/CD.

Management

Docugate provides a role-based “Admin Tool” for the allocation of authorizations in the solution. Existing authorization groups may be imported from AD, LDAP and SQL. The allocation of access rights for the administration and users can be individually adapted to each component and the entire document creation. New or modified templates can be clearly checked using the integrated test mode before productive release. There is no need for the construction of a physical test environment. A simple release of the documents for productive use is thus possible. Using Docugate’s “Form Designer”, “One-Click-Configuration”, “Text Module Management” and the tool “Field Dropper”, templates can be created very easily and go live quickly with Microsoft Office. The template administrator does not need additional programming knowledge.

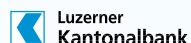
Template Management

By clever function combination of master templates and text modules, only very few templates are actually required. They are managed in a single, centralized location, without any redundancy.

Regardless of the number of employees, locations and divisions, the amount of office templates is reduced to an absolute minimum. As a consequence, global changes or additions to the Corporate Design need to be made only on a few master templates.

Content Management

The integrated Text Module Administration manages all of the company’s standard contents (text, tables, images, etc.). They are available in the familiar format as single Word or PowerPoint documents, and can thus easily be created and edited. Over the master templates, the text modules are automatically integrated into all defined templates. Furthermore, the contents can be manually inserted in a document at cursor position.





Office Integration

Applying the “Ribbon” and “Task Pane”, appearing in the familiar Microsoft Office “Look and Feel”, Docugate is perfectly integrated into Microsoft Office. Everyday functions (formatting, logo functions, etc.) are made available quickly and clearly to the user. Additions to the edited document are very easy.

Usability

Docugate excels with simplicity and speed. If templates are not controlled directly by the third system, the user will find immediately all templates of the company in “Docugate Interface”. The entire document creation is done self-explanatory with just one single dialog. The front-end displays context-sensitively just the information and input fields the user needs to create the current document. So the efficient document creation is fully ensured.

Output Management

“Output Manager” closes the life cycle of a created document by printing, filing or making it available for further use. Metadata will be passed for further processing to the source, DMS or archive system, etc. As output files, MS Office or PDF documents can be created. Background creation (silent) is also possible. “Print Gate” manages the correct printer tray for printing the document. For each printer and tray it can be once and centrally defined, which tray contains what type of paper and must be driven by the print job.



EXPERT WITH YEARS OF KNOW-HOW IN SOFTWARE DEVELOPMENT

For over 25 years, Leuchter IT Solutions AG has been developing standard software for efficient document creation and template management. With “Docugate”, the company specialises primarily in meeting the profound and comprehensive requirements for individual document creation (e.g. contracts), together with complex peripheral systems. Numerous companies, particularly banks and insurance companies, rely on the many years of expertise to create and manage easily and efficiently not only CI/CD-compliant documents and templates, but also to connect them to core banking systems, in accordance with the compliance guidelines of the customer. Leuchter has a vast experience in Project Management as well as in the implementation of standard software. Docugate is now operating at more than 100 customers throughout Europe and features 150 000 client installations worldwide. Based in Lucerne since 1959, the well established company with its staff of over 70 specialists, in addition to software engineering offers also IT infrastructure solutions on premise or within Leuchter CLOUD, as well as ERP solutions. Leuchter IT Solutions AG is a Microsoft Gold Partner and develops all projects applying the standardized approach of Microsoft Solutions Framework (MSF).

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