



## CASE STUDY

# First Data Selects Mercury Output Management System

## PDF Format Enables Customers to Easily Retrieve Individual Statements From within Very Large Files

### SUMMARY

- **Company:** First Data Corporation (FDC)
- **Facility:** Omaha, NE
- **Operation:** FDC operates in four business segments: payment services, merchant services, card issuing services and emerging payments
- **Total Employees:** 29,000
- **Annual Revenue:** \$7.6 Billion
- **Challenge:** To find a technology solution that could provide a secure one-search interface to enable customers to easily retrieve individual statements and reports

First Data Corp. (NYSE: FDC), with headquarters in Denver, CO, is a global leader in electronic commerce and payment services. The company serves approximately 3 million merchant locations, 1,400 card issuers and millions of consumers, making it easy, fast and secure for people and businesses to buy goods and services using virtually any form of payment. With 29,000 employees worldwide, FDC provides credit, debit, smart card and stored-value card issuing and merchant transaction processing services; Internet commerce solutions; money transfer services; money orders; and check processing and verification services throughout the United States and around the world.

First Data's Digital-ROM Services, part of the Card Issuing Services business unit, provides archiving services that warehouse customer statements, internal reports, as well as other historical data that needs to be securely archived for customers. Digital-ROM Services is the largest producer of individual ROMs under one roof, archiving over 1.25 billion pages per month.

First Data's Digital-ROM Services used Adobe Acrobat as the sole customer interface to retrieve statements that were stored in documents thousands of pages long. However, this offering had limitations that created unnecessary work and headaches for customers. For example, customers could query for data, such as an account number, and the search would bring the customer to the first page of the statement. Unfortunately, the statement's length was unknown. The customer had no way of knowing whether the statement was one page, two pages or twenty; the only way to tell was to page through the document until it ended. This was very labor intensive and an inefficient document management system because they were not able to email or print single statements as needed.

Another issue First Data faced was that the output files needed to be broken into chunks of 2,000 pages or less. Considering that the company had to copy, move, process and write roughly 300,000 files per month to ROM, this requirement added more time and complexity to the statement archival process. Moreover, the PDF transfer of these statement-sized chunks was an inefficient use of First Data resources because each statement would have to be transferred to a single PDF file.

Management identified the need for a technology solution that could provide a one-search interface to enable customers to easily retrieve individual statements within very large files. A requirement was that the implementation of the new technology did not compromise security.

Digital-ROM Services formed a team to find a solution. From a security perspective, the company had set a goal of maximizing security while offering a zero-interaction technology. However, most of the technology solutions that were available offered a secure environment, but required hand entered keying and decryption before the technology could be used.

The team took competitive bids from five other companies and selected the Mercury Output Management Solution by Captaris because the solution sufficiently met all of its needs.

First Data selected the Mercury Output Management Solution because of its ability to easily index, search and print selected individual statements into a user-friendly PDF file. Furthermore, the system met the company's security requirement as it is both secure and requires zero interaction from the customer.

The PDF format offered by the Captaris system was particularly attractive to the company because it preserves the original look and feel, its format is universally accepted for both presentation and archiving purposes, and importantly, PDF is easy to run on all PCs. Using the new Mercury Output Management Solution, customers can instantly locate a specific statement across a 1,000,000 page disc, then review it as desired and print it if necessary.

In addition to meeting the company's technical requirements, Alchemy products were already being widely used by the majority of First Data's customers for line data management. The company knew that this familiarity would reduce the learning curve tremendously and thus prevent unnecessary headaches.

Due to the efficient manner by which the Mercury Output Management Solution handles data import and indexing, Digital-ROM Services will be able to totally revamp its statement archival process. The new process will enable Digital-ROM Services to create a highly automated production facility that requires limited human intervention while maximizing hardware and software.

AFP statements had been the most labor-intensive area of Digital-ROM Services prior to the purchase of the Mercury Output Management Solution. However, the new Mercury system has created internal programming efficiencies.

With 2,250 clients worldwide receiving 18,000 CD-ROMs per month, Digital-ROM Services expects to reduce the number of output files it copies, moves, processes and writes to ROM from about 300,000 files per month to 50,000 files per month using the Mercury Output Management Solution.

Now that the Mercury Output Management Solution has been fully implemented into its external reporting processes, Digital-ROM Services will soon begin integrating the system into its internal reporting processes.

## FOR MORE INFORMATION

Captaris Business Information Delivery solutions help organizations of all sizes automate the information and document flow throughout the information lifecycle (capture, process, archive, deliver). With a comprehensive suite of software and services, Captaris helps organizations to grow revenues and increase profits while meeting compliance goals. Through a global distribution network of leading enterprise technology partners, Captaris has installed more than 90,000 systems in 95 countries in companies of all sizes, including the entire Fortune 100. For more information, visit [www.captaris.com](http://www.captaris.com) or call 1.800.443.0806.

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