

## Expersoft PM1e - Module Data Sheet

# REPORT MANAGER, ARCHIVING & MASS PRINTING

The PM1e Report Manager, Archiving & Mass Printing module is a complete solution for the automation and batch processing of routine and ad-hoc reporting tasks. It supports users by offering a comprehensive bundle of functionalities for the generation, export, publication, and archiving of standard and custom reports.

### Business Case

Comprehensive and straightforward reporting capabilities address customers' and management's demands for transparency. A powerful reporting engine ensures delivery of the required information to the right person, on-time, and at low cost.

### Key Benefits

- Saves time and cost through sophisticated self-service and automation mechanisms
- Server-based engine enables centralized controlling and maintenance
- Creates paper and electronic reports from a single source
- Promotes effective branding with corporate templates

### Key Features

- Large selection of standard reports out of the box
- Report generator tool for customer-specific and ad-hoc reports
- Multi-dimensional consolidation on unlimited levels (e.g., for Family Office reporting)
- Scheduling of automated report jobs
- Batch processing of report tasks for mass printing and PDF generation
- Fully customizable report templates
- Export in XML format or directly to Microsoft® Excel

### The PM1e Platform

Expersoft PM1e is a comprehensive and versatile wealth and asset management platform. It provides financial service firms with an unrivaled width of capabilities to analyze, plan, implement and control investments within one flexible, integrated, and easy-to-use environment.

Expersoft tailors the various PM1e components to solutions which precisely meet our customers' requirements in scope and scale and support a truly Straight Through Process from relationship management to investment decision, order management, and financial accounting.

### About Expersoft

Expersoft Systems provides leading-edge software products and services for retail and private banks, family offices, asset managers, brokers, and other financial service firms.

Founded in 1992, Expersoft currently serves over 200 clients worldwide from its headquarters in Switzerland and through its subsidiaries and distributors in Europe, the Middle East, Asia-Pacific and North America.

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