



MOBILE FINANCIAL OPERATIONS

Continuous matching and reconciliation
for operations managers



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Mobile Operational Control

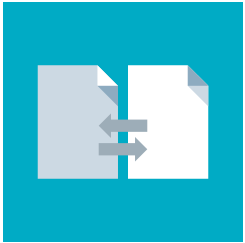
Matching and reconciliation are key accounting processes that enable banks and other financial organizations to ensure sets of financial records are in agreement. Being able to perform these functions anytime, anywhere is a game-changer for today's operations managers, who are required by the market and regulators to continuously monitor their business, even while on the road. Mobile operational control results in higher efficiency, improved responsiveness, and reduced risk.

SunGard enables mobile operational control via a Windows* tablet application that offers essential matching and reconciliation capabilities drawn from the comprehensive SunGard IntelliMatch* Operational Control suite. Running this mobile app on powerful Intel® processor-based devices lets operations managers access real-time insights, participate in critical processes, and resolve issues no matter where they are. Back in the data center, the solution suite capitalizes on the tremendous processing power of Intel® Xeon® processor-based servers and years of software optimization work by Intel and SunGard.

To accommodate multiple working styles, operations managers need versatile computing systems such as the Dell Venue* 11 Pro 7000. With the ability to switch among tablet, laptop, and docked desktop modes, operations managers can meet the demands of the job whether sitting, standing, or on the go. An Intel® Core™ M processor provides the Dell system with the perfect balance of performance and low power.

This guide will further explore the benefits, use cases, and capabilities of this solution and how it can help organizations modernize their financial operations.

Mobile operational control results in higher efficiency, improved responsiveness, and reduced risk.

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Improving financial matching and reconciliation

Organizations such as banks, brokerage firms, and asset managers need ways to improve the effectiveness and efficiency of key accounting processes, including matching and reconciliation. Though reconciliation was traditionally an end-of-day activity, organizations today are moving toward a more continuous approach that lets them better capitalize on fluid opportunities and eliminate risks.

At the same time, organizations need efficient ways to monitor and report on matching and reconciliation processes so they can more easily comply with a growing number of financial regulations. In addition, because profit margins are tight across industries, many organizations are looking to control the costs of these and other back-office processes.

In the past, some organizations have handled matching and reconciliation processes using simple spreadsheets, but that approach lacks auditing and compliance capabilities. Other organizations employ multiple applications from distinct vendors to gain the required functionality, but doing so can raise costs and increase complexity.

Financial operations teams need comprehensive, integrated solutions.

Financial operations teams need comprehensive, integrated solutions that offer the full breadth of requisite capabilities. Solutions should enable both intra-day and end-of-day processes, identify and help resolve exceptions, monitor liquidity and cash flow, and deliver key intra-day and end-of-day information to employees. Managers should be able to efficiently conduct payment investigations, analyze business process effectiveness, and address other requirements.

To resolve issues quickly and keep internal processes flowing, operations managers must be able to access important information and capabilities anytime, anywhere. These managers are often on the move, but the processes they oversee cannot wait for them to return to their desks. They need mobile solutions that can help them pinpoint and address potential issues whether they are taking the train to work, attending a company meeting, or visiting a customer site. These solutions must enable managers to submit approvals and sign off on decisions quickly to keep business moving. Solutions must facilitate communication with colleagues and customers. They must allow multitasking while being easy to use.

In short, operations managers need mobile operational control solutions that help improve efficiency, increase responsiveness, and reduce risks.



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Mobilizing operations management

The proposed computing environment for financial operational control is shown in Figure 1 and consists of the following:

- SunGard IntelliMatch Operational Control suite on the back office
- PC workstations running IntelliMatch Operational Control web app
- Tablets and 2 in 1 systems running IntelliMatch Operational Control Windows 8.1 mobile app

The IntelliMatch Operational Control suite is an integrated, highly capable platform that enables

organizations to automate and optimize the matching and reconciliation process for financial transactions and balances. The suite runs on Intel Xeon processor-based servers. The robust performance and large memory capacity of the Intel Xeon processors enable the solution to process tremendous volumes of data and deliver results in real time. The density of this processing architecture helps organizations achieve this impressive performance while controlling hardware acquisition, power, cooling, and real estate costs. Intel and SunGard have worked together to optimize the solution to take maximum advantage of the Intel server architecture.

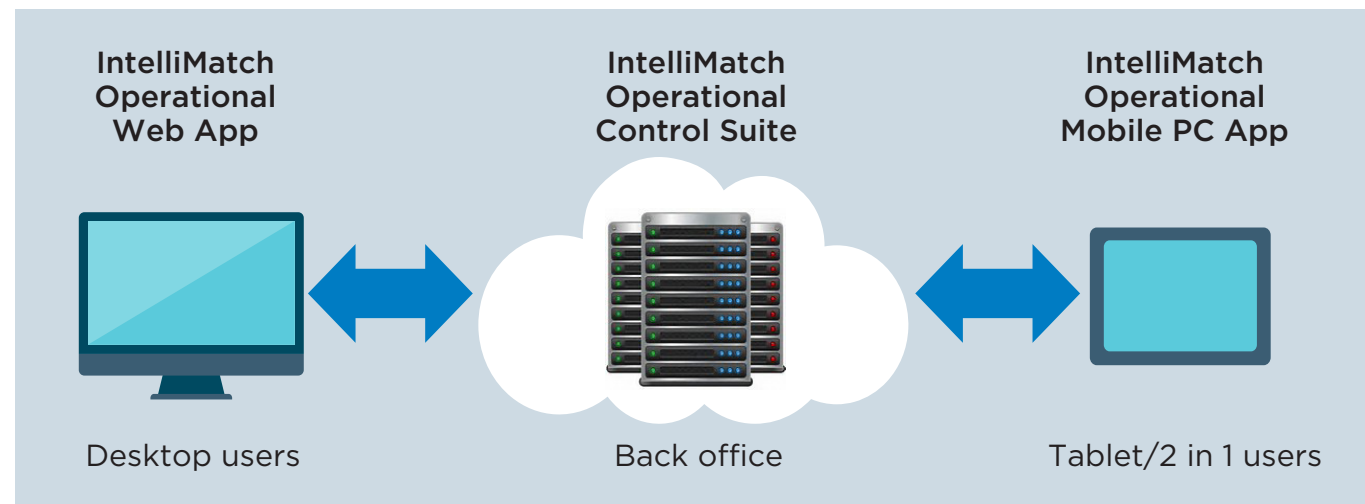


Figure 1. Proposed Computing Environment Solution



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Desktop users can access the full capabilities of IntelliMatch Operational Control from a web-based interface. However, to facilitate access for operations managers on the move, SunGard also offers a mobile app that provides the essential information and capabilities operations managers need to keep reconciliation processes flowing throughout the day. Additional details on IntelliMatch Operational Control are found in the Software Considerations section of this document.

The SunGard IntelliMatch Operational Control Suite is an integrated, highly capable platform.

The mobile app runs on a broad array of Intel processor-based Windows mobile devices such as tablets and 2 in 1 systems. Because the app runs on Windows*, operations managers can use a single system for all their computing needs, with enterprise applications running right alongside the SunGard app.

For busy operations managers with heavy travel schedules, Intel Core M processor-based 2 in 1 systems offer the right balance of performance and mobility. These systems can deliver the performance needed for multitasking and the energy efficiency required for continuous access to the SunGard app all day long. Additional details on the recommended Dell Venue 11 Pro 7000 system are found in the Hardware Considerations section of this document.

Versatile 2 in 1 systems

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Selecting computing devices for a business can be challenging considering all the choices available to IT managers. In the financial services industry, 2 in 1 systems are gaining traction for several reasons.

First, 2 in 1 systems offer flexibility where it is otherwise difficult to predict the needs of workers. A 2 in 1 system functions as both a tablet and a laptop, enabling workers to choose the mode that best fits a given task. Operations manager functions suited for tablets include quick data lookup, reviewing reports, or transaction approvals. These and similar tasks can be accomplished even more easily on a detachable 2 in 1, so the user is not burdened with a keyboard for use cases that do not require it.

Next, desktop-class processors enable 2 in 1 systems to deliver the performance required for multitasking. In fact, a 2 in 1 could be the operations manager's only PC after adding the right full-size peripherals (HD displays, keyboard, and mouse) for working at the office.

Finally, 2 in 1 systems are designed for mobility. They offer the right size, weight, and battery life to support busy travel schedules, enable conference room and hallway productivity, and encourage users to carry the device everywhere they go.

Dell Venue 11 Pro 7000 Series

The Dell Venue 11 Pro 7000 is a 2 in 1 system that meets the rigorous requirements for mobile productivity in the financial services industry. It can function as a 10.8-inch tablet or as a small laptop using a detachable keyboard. By employing a custom dock, organizations can also use the device to provide a total desktop experience.

The Dell Venue 11 Pro 7000 meets the mobility needs of the financial services industry.

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In tablet mode (Figure 2), the Dell Venue 11 Pro 7000 weighs just over 1.5 pounds and is less than 11mm thick. This is possible with the latest Intel Core M processor, whose thermal design power (TDP) of 4.5 watts is the lowest ever in the Intel Core processor family and enables a quiet fan-less design. The tablet experience is complete with a high-precision, two-button active stylus for quickly taking notes, jotting down ideas, or checking off a to-do list.

For laptop use, the Dell Venue 11 Pro 7000 supports two different keyboards: a slim keyboard that attaches magnetically to the body and a slightly larger keyboard that houses a second battery to support long workdays. Unlike other keyboards in the market, these Dell keyboards are full size and include a touch pad for a familiar user interface.

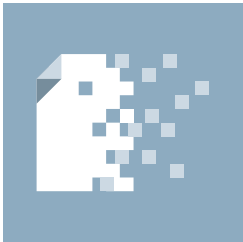
Whether in tablet or laptop mode, operations managers need continuous wireless connectivity to fulfill their duties. The Dell Venue 11 Pro 7000 uses an Intel® Dual-Band Wireless-AC 7265 802.11ac Wi-Fi card to provide robust reliability, long-distance connectivity, low power consumption, and exceptional performance. For operations managers who are frequently away from a Wi-Fi hotspot, Dell also offers an optional Intel® XMM™ 7160 4G LTE mobile broadband card for this system.



Figure 2. The Dell Venue 11 Pro 7000

A full desktop experience is available for the Dell Venue 11 Pro 7000 via a custom docking station supporting HDMI or DisplayPort for connecting one or more flat panels, RJ45 for high-speed Ethernet, and USB ports for connecting a desktop-sized mouse and keyboard.

The Dell Venue 11 Pro 7000 is fully PC compatible. Running Windows 8.1 Pro, this 2 in 1 works with business applications, peripherals, and management tools for easy integration into any business. In addition, the IT manager may choose Intel® vPro™ technology on this platform to ensure a PC infrastructure with enterprise-class manageability, security, and productivity features.



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Financial Process Optimization

To help organizations address various requirements while controlling complexity, the SunGard IntelliMatch Operational Control Suite integrates the components shown in Figure 3, which also indicates features supported by the mobile app. This broad portfolio enables financial institutions to gain a complete range of capabilities without having to purchase and manage solutions from different vendors.

The SunGard suite addresses multiple types of reconciliation as well as business intelligence and industry-specific workflows. For example, banking institutions can automate the daily balancing of the ATM and card network, automate cash reconciliations and payment investigations, and optimize business processes to reduce costs and risk. Similarly, brokerage firms can manage exchange-traded and OTC derivatives activity while providing cash managers with liquidity monitoring, reporting, and forecasting tools. All financial institutions can use IntelliMatch Operational Control to optimize daily workflow decisions including escalations, approvals, alerts, and notifications.

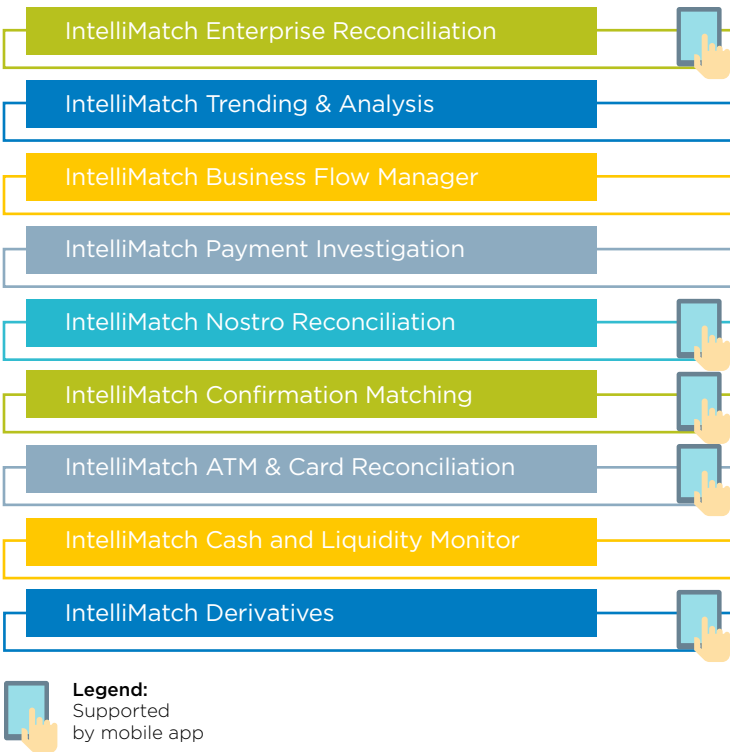
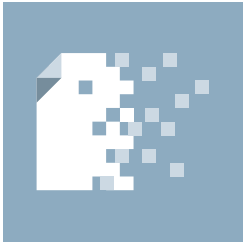


Figure 3. Components of the IntelliMatch Operational Control Suite



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Mobile Operational Control

The groundbreaking SunGard IntelliMatch Operational Control mobile app provides operations managers with the essential information and capabilities they need to oversee matching and reconciliation processes while they are away from their desks. The app interacts with the back-end suite to help managers monitor activities, undertake reconciliation tasks, and respond to requests on the go. Optimized for a touch-based environment, the app presents the most pertinent information in a well-designed dashboard that helps the user navigate easily from one task to the next.

The mobile app is optimized for Windows 8.1 and adopts key OS differentiators, including a “live tile” showing the number of unresolved alerts as shown in Figure 4. It also supports swipes within the app to show option menus and has Settings integration within the Charm Bar.

Tapping on the live tile executes the application—and once logged in, the user is presented with a Summary screen that includes Alerts, Key Performance Indicators, Reports, Messages, and Favorites. As shown in Figure 5, the dashboard also includes flags on the upper right that indicate the number of open alerts by priority level. For example, a red alert requiring immediate attention might be triggered when a cash exception process has exceeded a critical 250-item unmatched threshold. An amber alert might indicate that an approval is required for reconciliation with a large monetary amount.

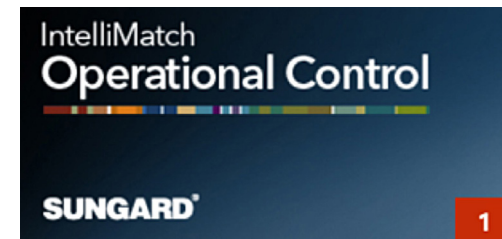
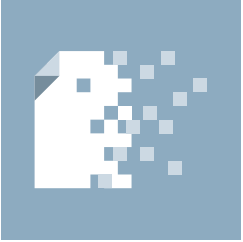


Figure 4. Example Windows* Live Tile



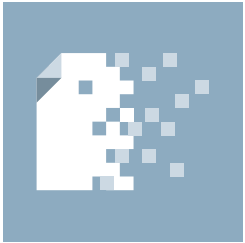
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Through this tool, managers can view critical information in real time and drill down as needed for more actionable data. Advanced search functionality enables managers to track down specific records or groups of records that meet certain criteria.

In addition, detailed spreadsheets can be manipulated right within the app with a range of user options executable on a line item basis (as shown in the User Experience section of this document).



Figure 5. IntelliMatch Operational Control Summary Screen

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Windows 8.1 Pro

Besides the app-specific features mentioned above, another advantage of Windows 8.1 Pro is that operations managers can use a single system for all their computing needs. The 2 in 1 PC can be configured with a corporate IT image running all critical enterprise software. The user can multitask between e-mail, spreadsheets, and the IntelliMatch Operational Control application, even taking advantage of split-screen functionality in the Windows 8.1 Pro operating system.

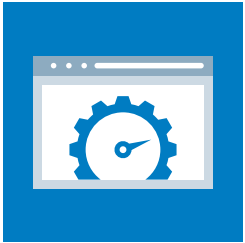
For administrators, Windows 8.1 Pro simplifies the deployment of mobile products by allowing IT to standardize on one enterprise-class OS across all platforms. Windows 8.1 Pro is easy to provision, manage, and secure with a wealth of standard tools and consoles. For example, devices like the Dell Venue 11 Pro can be joined to a Microsoft Active Directory* domain and configured to comply with specified group policies. Windows tablets also support standard PC anti-malware solutions, and the entire drive can

be encrypted using Microsoft BitLocker*, a standard feature in Windows 8.1 Pro. Being fully PC compatible also means the Dell tablet/2 in 1 supports legacy peripherals such as printers, scanners, card readers, and more.

Finally, Windows 8.1 Pro is upgradable to Windows 10, which will usher in a whole new set of security, management, and productivity options for PC users and IT managers. Some highlights include optimized user interfaces for 2 in 1 products whether in tablet or notebook mode, secure enterprise app store, a more secure browser, and a more sophisticated way to manage and deliver software updates to individual platforms.

Windows 8.1 Pro enables a fully manageable, PC-compatible solution.

Key capabilities of the IntelliMatch Operational Control dashboard



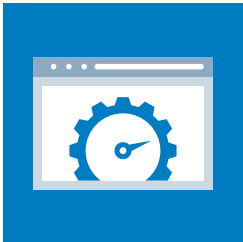
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From the Summary Screen, the user can quickly scan for items requiring prompt attention. Information is presented in charts, graphs, and tables that convey real-time aggregated data in a visual format. Swiping down on the Summary Screen (or from any of the

dashboards) also results in the navigation menu shown in Figure 6. All menu options are configurable and the user can even save search results into the Favorites menu for easy access.



Figure 6. IntelliMatch Operational Control Mobile App Navigation Menu



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To look into a dashboard item, the user can tap the live tile to expand the current thumbnail chart or tap on the header to display a scrolling panel of all items in that category (KPI or Alert). This is shown in Figure 7, which depicts a drill-down of KPI information. The user

interface incorporates an easy way to add KPI charts, and the same capability is available for Alerts. Alerts are also directly accessible from the flags on the upper right of the dashboard (as seen in Figure 5).

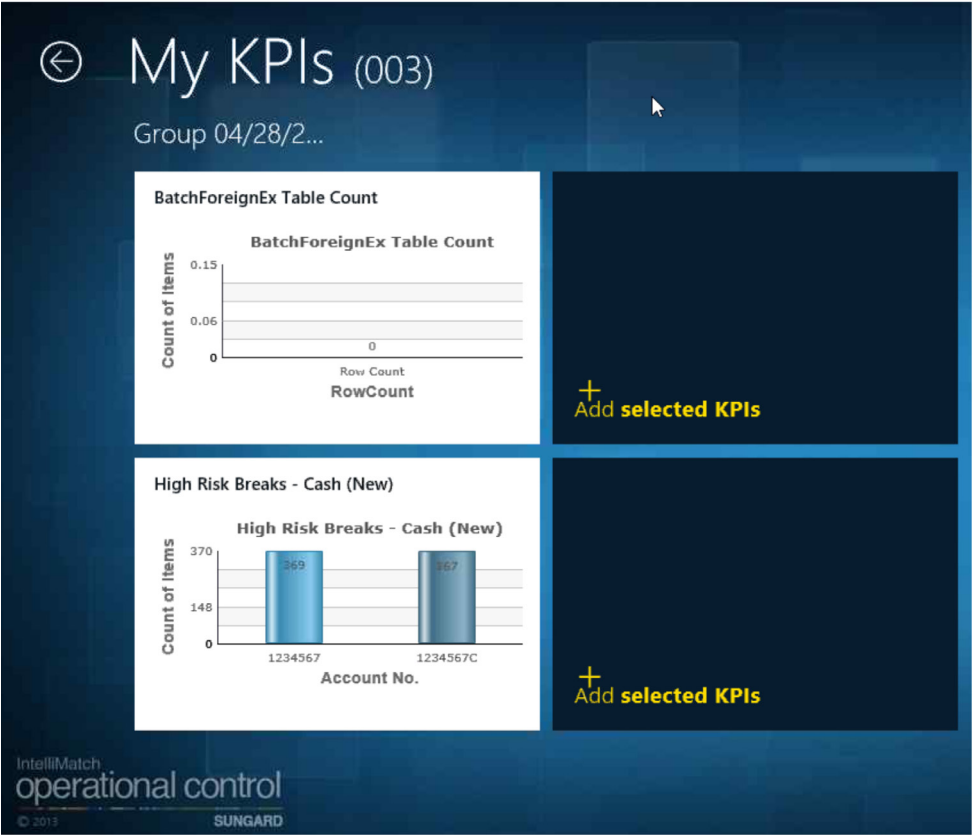
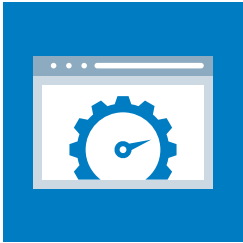


Figure 7. IntelliMatch Operational Control KPI Panel



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All charts and graphs are backed up by real-time data that is also accessible by the user. In spreadsheet view, users can examine a fully navigable and sortable data set of reconciliations, account balances, or transactions depending on the view. For example, Figure 8 shows a large data set of cash transactions that is sortable

by Match Status whether Matched, Unbalanced, or Outstanding. Similarly, Figure 9 shows a summary of high-risk breaks sorted by exceptions signified by an “E” in the Activity column. IntelliMatch Operational Control offers powerful ways of aggregating data from various sources for easier consumption.

Welcome **Lorens**

Test Cash Transactions
 Showing 1 to 12 of 1763

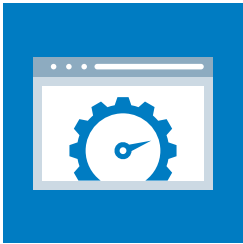
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Activity	Balance P...	Account N...	Fund Nam...	Source	Match Stat...	Date	Avail/Paid	Amount	D / C
M	0 0	Cash Nostro	1234567	Capital Partners	Goldman	Unbalanced	08/22/2014	08/22/2014	259.00 Debit
M	0 0	Cash Nostro	1234567C	Capital Partners	Goldman	Unbalanced	08/22/2014	08/22/2014	255.00 Credit
	0 0	Cash Nostro	1234567C	Capital Partners	Goldman	Outstanding	08/22/2014	08/22/2014	1,000,023.00 Credit
	0 0	Cash Nostro	1234567	Capital Partners	Goldman	Outstanding	08/22/2014	08/22/2014	1,000,000.00 Debit
	0 0	Cash Nostro	1234567C	Capital Partners	Goldman	Outstanding	08/22/2014	08/22/2014	165,489.00 Credit
	0 0	Cash Nostro	1234567	Capital Partners	Goldman	Outstanding	08/22/2014	08/22/2014	165,470.00 Debit
	0 0	Cash Nostro	1234567C	Capital Partners	Goldman	Outstanding	08/22/2014	08/22/2014	132,421.00 Credit
	0 0	Cash Nostro	1234567	Capital Partners	Goldman	Outstanding	08/22/2014	08/22/2014	132,410.00 Debit
M	0 0	Cash Nostro	1234567	Capital Partners	Goldman	Matched	08/22/2014	08/22/2014	400.00 Debit
M	0 0	Cash Nostro	1234567C	Capital Partners	Goldman	Matched	08/22/2014	08/22/2014	400.00 Credit
M	0 0	Cash Nostro	1234567	Capital Partners	VPM	Matched	08/22/2014	08/22/2014	300.00 Debit

IntelliMatch
 opera
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Info Detail Line Chart Refresh

Figure 8. IntelliMatch Operational Control Spreadsheet View



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Figure 9 also shows the expanded Actions Menu, a key element of the IntelliMatch Operational Control user interface. The menu supports aggregate and by-line-item actions. For example, the Change View action allows the user to simplify the viewable spreadsheet by displaying only records that meet certain criteria. Line-item actions include attachments, comments, and forwarding notifications. The interface allows the

operations manager, for instance, to quickly approve a match proposed by a reconciliation analyst or request more information. In addition, managers can create notifications for other reviewers or clerical workers. Instead of sending an e-mail with several large file attachments, the notifications capability provides an efficient way to direct recipients back to the app, where they can add approvals or make other changes.

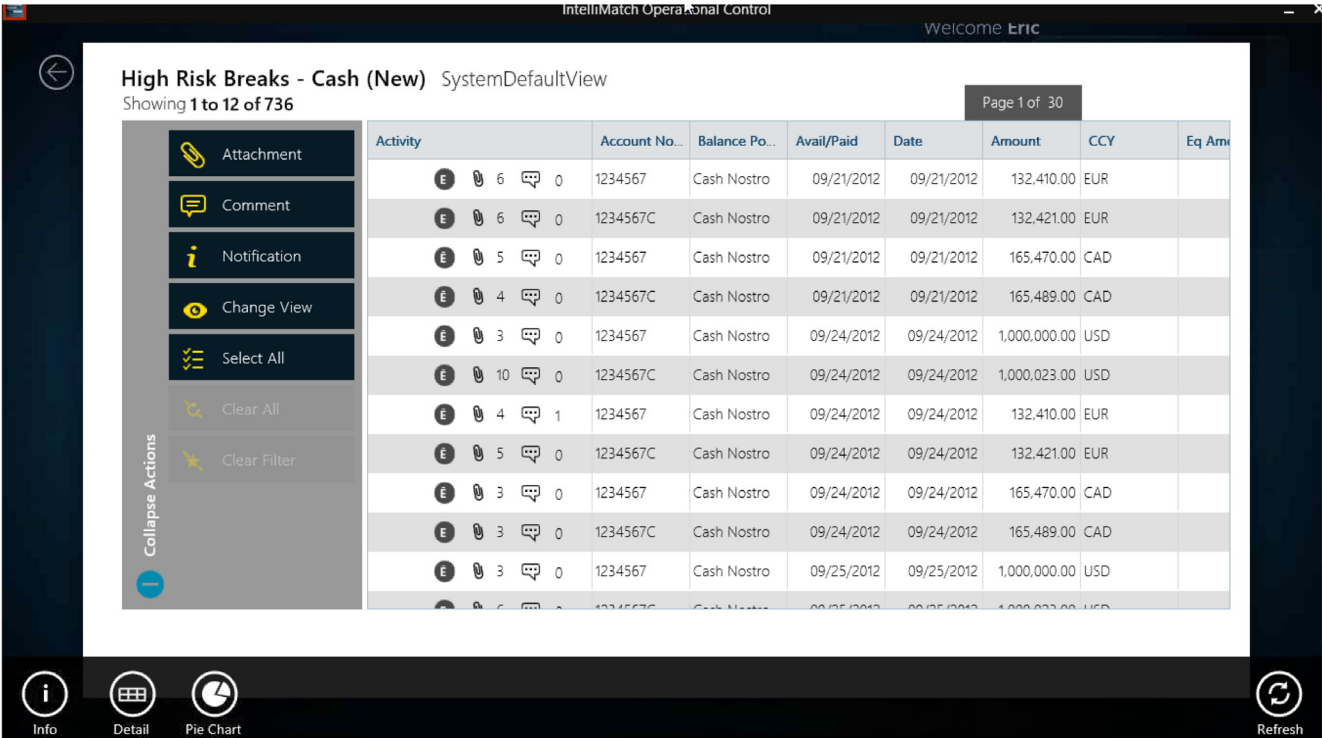
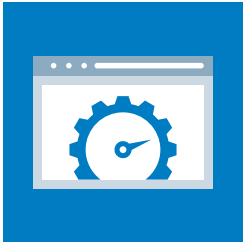


Figure 9. IntelliMatch Operational Control Spreadsheet View with Actions Menu



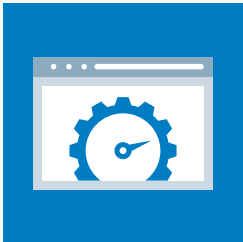
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Advanced search capabilities allow managers to search for particular subsets of data across financial databases. Figure 10, for example, shows a simple search (from fictitious data) for all accounts with a minimum balance of \$10 million. The results then are displayed in Figure 11 (next page) where users have

additional options, including saving the search to their Favorites for easy referral.

These search capabilities make operations managers much more productive, saving precious time otherwise spent exploring complex financial records with overwhelming amounts of data.

Figure 10. IntelliMatch Operational Control Search Capabilities



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The IntelliMatch Operational Control mobile app also integrates reporting and messaging tools to complement the functionality of PC productivity suites such as Microsoft Office*. This enables basic communication to occur right within the app so that full multitasking through the Windows OS is not necessary for simple tasks.

While the app was designed for mobile productivity, users may find it equally useful while sitting at their

desks. For example, a docked tablet in extended display mode could show the IntelliMatch Operational Control app on the tablet screen with the full Windows desktop extended to the larger display. This way, the operations manager can continually monitor the graphical dashboard for alerts. When a situation demanding their involvement arises, they can drill down to the spreadsheet level, add comments, approve work, and sign off on reconciliation results. This solution is truly optimized for anytime, anywhere work.

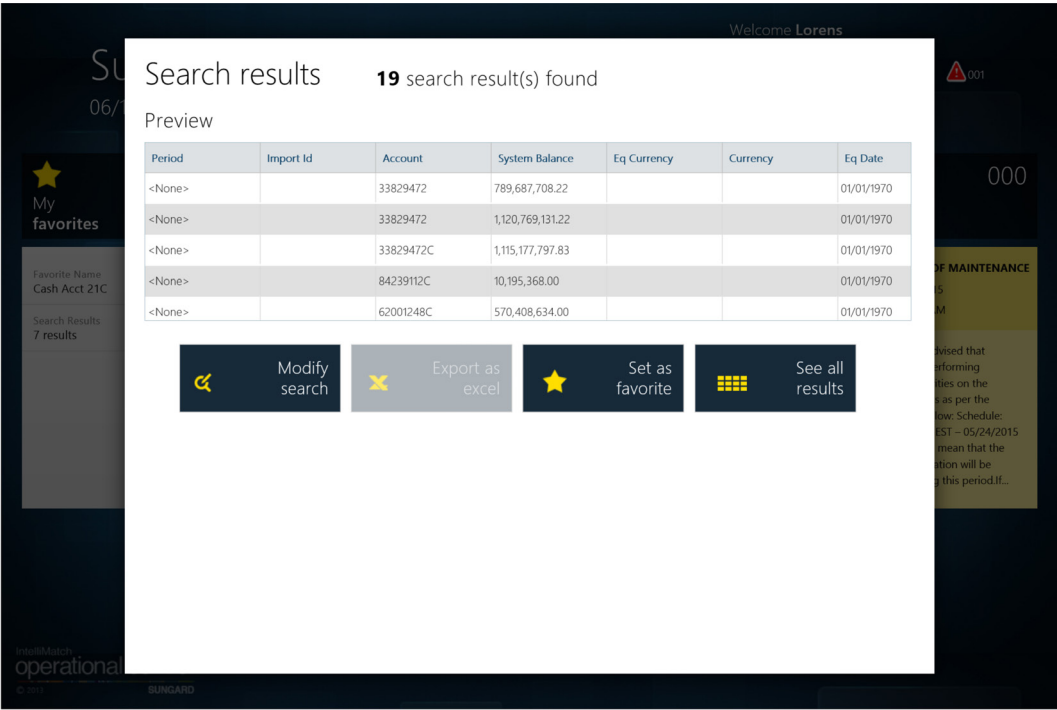


Figure 11. IntelliMatch Operational Control Search Results Window



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Implementing the end-to-end solution

SunGard advisors can help build the business case for the solution, provide proofs of concept, and offer expert advice on everything from complying with regulatory changes to choosing the right infrastructure. SunGard professional services teams can then help streamline the design and deployment of the IntelliMatch Operational Control solution.

Deploying the overall IntelliMatch Operational Control solution suite within a company's data center typically involves many teams and detailed planning within the organization. Dedicated project managers help keep the deployment on time and on budget, while technical and business consultants provide expert installation and configuration support.

First, deployment specialists size the solution, defining the right mix of web servers, application servers, and SQL servers. The professional services team then determines the optimum configurations for the customer's specific needs.

Many organizations take an incremental approach to deployment. SunGard teams can help provide a smooth transition from an existing solution to IntelliMatch Operational Control, and to gradually expand the

IntelliMatch Operational Control solution to capitalize on greater functionality. If an organization is moving from a spreadsheet-based approach to this comprehensive matching and reconciliation solution, SunGard can help migrate existing data to the new environment.

The IntelliMatch Operational Control web app for desktop users requires no software installation on a PC, just access to a browser. The IT staff needs to only manage authentication and enable secure access to the application.

SunGard professional services can provide end-user training as well as IT administration training so in-house IT staff has all the knowledge and skills they need to operate the solution themselves. After-course programs, including e-learning and train-the-trainer courses, can be customized to an organization's specific requirements and business configuration.

SunGard also offers team augmentation to fill short- or long-term gaps in IT resources. Dedicated onshore or offshore teams can help assess new business requirements, configure static data, match rules and reports, and deploy new reconciliations.



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For organizations that do not plan to host and operate the solution in-house, SunGard also offers a range of managed services. Services range from hosting the infrastructure and managing technical services to providing full application management and business process outsourcing. Managed services enable organizations to accelerate the time to value, maximize operational performance, and control costs.

Provisioning the Mobile App

The IntelliMatch Operational Control mobile app is typically provisioned by the enterprise IT group, but it

can also be downloaded directly to a device by users since the app is downloadable from the Windows Store* (Figure 12).

The mobile app is easy to set up. Administrators first set access and security policies for users so the organization can protect the sensitive information available through the app. Administrators then configure the app by specifying the URL, service name, port, and connection type (http or https) for accessing the IntelliMatch Operational Control Suite running in the back office.

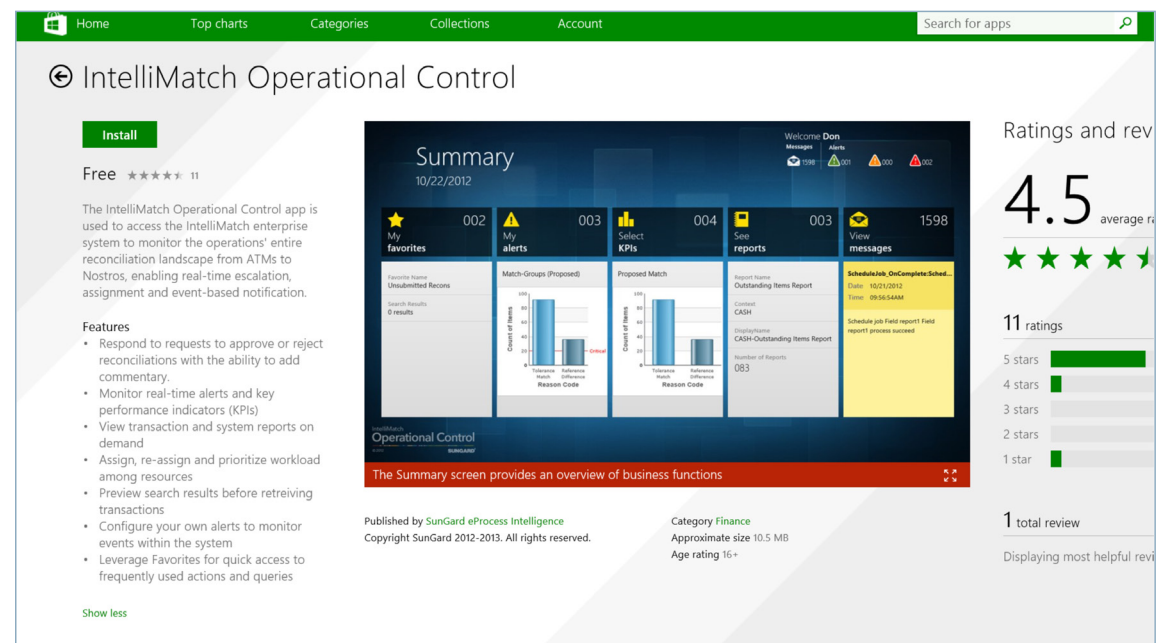


Figure 12. IntelliMatch Operational Control on the Windows Store

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User hardware preferences

While the IntelliMatch Operational Control mobile app provides critical and valuable functionality, it offers a subset of the capabilities accessible via the web app (which employs the entire solution suite from Figure 3). Therefore, mobile users may occasionally log into the web app from their tablets to perform additional business tasks.

Conversely, desktop users of the web app may find that the mobile app with its dashboard interface is convenient to use even back at their desks. For example, the mobile app would function just as well on a desktop all-in-one touchscreen PC. If the operations manager chooses this high-end desktop option, they will also need a companion tablet for their mobile needs. In this case, the right tool for the job would be an Intel® Atom™ processor-powered tablet with Windows 8.1 Pro, providing all the advantages of a Windows platform but in a lower-cost, thin and light, long battery life system.

Finally, the upgrade path to Windows 10 also offers some interesting alternatives as it pertains to app deployment. On Windows 10, businesses can create a private app store that can contain both public and private apps. Sophisticated IT departments could use this capability to deploy IntelliMatch Operational Control in tandem with other enterprise apps, and more easily customize the software image for various types of users.

The IntelliMatch Operational Control Suite is accessible to operations managers across all PC form factors.

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Enabling continuous matching and reconciliation

By using the IntelliMatch Operational Control mobile app in conjunction with Intel Core M processor-based devices such as the Dell Venue 11 Pro 7000, financial institutions can enable operations managers to handle matching and reconciliation processes anytime, anywhere.

Key business advantages include:

- **Improved efficiency with faster response times** due to continuous access to up-to-date information and the ability to take decisive actions that keep the business moving. Operations managers can identify potential problems, determine causes, and submit approvals whether in or out of the office.
- **Greater business agility** by empowering operations managers with real-time financial data that helps organizations capitalize on fast-moving opportunities and maximize use of funds.
- **Reduced operational risk** by quickly addressing issues ranging from unbalanced accounts to unmatched items or transactions on hold. IntelliMatch Operational Control helps ensure regulatory compliance and balance sheet attestation, and assists with financial reporting.

For more information

To learn more about SunGard and this solution, visit:

<http://financialsystems.sungard.com/solutions/reconciliations/intellimatch-operational-control>

To learn more about Intel Core M processors, visit:

www.intel.com/content/www/us/en/processors/core/next-generation-core-processors.html



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