

# One Pilot for Every Need

Success Story | Compart



The insurer ROLAND Rechtsschutz has updated its output management system. At the core of the change is Compart DocBridge Pilot software for the centralized and recipient-specific output of documents.

The ROLAND Group generates approximately three and a half million documents a year: policies, correspondence with attorneys and clients, premium statements, account cards, reports, etc. Of those, 260,000 land directly in the archive, with the remainder output through various channels in the form of a fax, e-mail or printed copy.

Soon Roland, the international provider of legal protection insurance wants to send certain correspondence as an E-Postbrief (legal letter of the German Post). Managing these various documents through different channels is a complex task. In the print area alone, ROLAND runs 90 different print stacks, based on the category and recipient of the communication.

It is easy to see just how quickly data could get mixed up or even documents output incorrectly, such as producing the premium statement as an e-mail attachment instead of a physical letter, as specified. Alternatively, a customer card may be missing from the insurance policy because the system did not have the necessary data for including the attachment. In short, the challenge is to combine documents produced in different departments centrally, bundle them and mail

them to the correct address.

## Customized Mailings for Every Channel

ROLAND was therefore looking for a tool that would automatically recognize which document to process, how to process it, and output it via the correct channel. They also needed software that would support all the popular data formats as input and output, such as PCL, PDF and AFP, since those were the primary ones the company used. (See glossary for more on data formats.)

Over time, the IT infrastructure of the insurance company had undergone repeated changes.

Without doubt the most significant was switching over to a new system for the core insurance business, requiring all the up-stream and downstream soft- and hardware systems to be updated, including document management. Report generation needed the most significant attention. "We had to address the issue of how we were going to print reports at all," recalls Ilja Wiewers, Head of Document Management (DM) at ROLAND Rechtsschutz-Versicherungs-AG. There was an IBM-based print tool, but it covered only the "last mile" to the printer. What was missing was a complete DM system that could read out the data for printing and prepare the necessary spool files. Enter DocBridge Pilot.

## Executive Summary

The ROLAND Group, an international Insurance Company, with a specific focus on Legal Protection, has recently updated its Output Management System. At the core of this IT transformation is the Compart software DocBridge Pilot, an important tool allowing ROLAND to manage the printing of around two million documents annually: these include policies, correspondence, customer cards, reports, attachments and accounts. In the print area alone, ROLAND runs 90 different print stacks, based on the category and recipient of the communication.

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# One Pilot for Every Need

The software developed by Compart is platform-independent and supports customized mailings into every type of output: print, e-mail, fax, archive file, and download-file in Web portals. The import of the documents to be processed is kept separate from the output of the mailings. The software copies the data and converts it while retaining the file format. At this stage, the document can be modified, distributed, classified, indexed, and converted into all the standard formats—whatever is required. This enables documents to be displayed, printed, archived and processed accordingly. The information needed for this process is extracted as metadata. While

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the software assigns the documents to a central pool, the metadata is stored in a relational database. A printer driver implemented on the PC clients allows users to also save office documents in the same mailing pool and continue processing them centrally.

## Documents are Retrieved Automatically

Then there are the different functions for outputting the documents, such as sorting, converting to the desired format, or “enhancing” pages with additional information for continued processing. It is also possible to bundle multiple documents from different sources and in different formats but destined for the same recipient. Depending on the software configuration, this task can be done completely automatically or initiated at some defined point in time. The advantage is that the software takes into account the permissible weight limit for a particular postal rate when it generates the mailings. Overall postal charges can be optimized in this way.

ROLAND uses DocBridge Pilot solely for printing. Once a day, all the documents created via an integrated scheduling function are retrieved from a central data pool and loaded into DocBridge Pilot. There the documents are prepped and converted into AFP or PDF spool files.

## No Safety Net or False Bottom

Ilja Wiemers: “To be honest, choosing the Compart software was the right decision. All our really specific requirements could to be implemented in the shortest time.” For example, Output channels needed to be sorted by postal code and then segmented by specific value while the mailings were numbered sequentially in the address window at the same time. Another challenge was generating an AFP output data stream in which the different documents were saved as images.

Countless modifications that were needed are simply part and parcel of DocBridge Pilot today, including the option to copy print jobs. For Wiemers, the quick implementation was a major factor in the project’s success. The forward-looking approach and professionalism of the Compart consultants also played a huge role. “Thanks to many insider tips, we avoided unnecessary delays.” Wiemers and his colleagues could not afford delays in any case: they had only three months to get DocBridge Pilot up and running. The new system was scheduled to go live on January 1, 2007. The “highwire act” proved a success, with even the subsequent upgrades to DocBridge Pilot coming in on time and in budget.



## Glossary

### Advanced Function Presentation (AFP)

Formerly developed by IBM, is still the most frequently encountered data stream – especially in the industrial processing of large numbers of documents such as invoices, account statements, etc. Today the format is manufacturer-independent. AFP allows high print speeds and features excellent separation of user data and recurring data (forms). Today responsibility for its further development and maintenance lies with the AFP Consortium.

Its comprehensive, flexible resource management and compactness make AFP a favorite among users. Developers appreciate its well thought-out and documented architecture. Originally designed for digital black-and-white printing, AFP is now an established standard in digital color printing as well.

### PDF (Portable Document Format)

Developed in 1994 by Adobe Systems, was and is a worldwide standard, thanks to its ongoing development. It was the first platform-independent exchange format for electronic documents and its many benefits put it front and center in nearly all market segments. Numerous special versions have emerged over the years that address the special requirements of specific industries and areas of application, including PDF/A (archiving), PDF/X (print/graphics industry), PDF/H (healthcare), PDF/E (engineering) and PDF/UA (for the sight-impaired).

### PCL (Printer Command Language)

PCL was developed by HP for laser printers, although it is also used for inkjet printing. It has become the de facto industry standard for transactional printing, used by many manufacturers. Nowadays nearly every printer can be controlled using PCL.

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