

How Five Organizations Solved Their Complex Document Output Challenges

Topics Covered in This White Paper

- Challenges and Opportunities in Output Management
- Mastering Legacy Data on Modern Print Streams: World Marketing, Inc.
- Raising the Bar on Variable Data Accuracy and Efficiency: Data-Mail
- Gaining Confidence in Variable Direct Mail Production Quality: Japs-Olson
- Taking Statement Automation to the Bank: Bluegrass Mailing
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- About Compart Solutions

CHALLENGES:

- Large varieties of input formats to contend with
- The need to streamline the end-to-end process
- Dealing with siloed data and compliance issues

TAKEAWAYS:

- Leading companies utilize best practices in Output Management
- Effective Output Management provides streamlined operations and cost savings
- Compart has a legacy of success in Output Management

Challenges and Opportunities

Over the past few decades, the issues in output management have radically changed. Most of the transformation is due to the increased importance of electronic documents and the complexity of today's marketplace for both users and suppliers. From the production of a document through revision, delivery to recipients and archival, output management comprises a substantial investment of time, staffing, IT, and financial resources.

While the steps behind document output vary from company to company, all output is ultimately split between paper and electronic formats—those sent by email or to smartphones and tablets. The latter are increasingly viewed as an attractive and cost-saving alternative to traditional paper documents.

In addition, there is an increasing need to observe special conventions and standards, such as adherence to PDF/A for the production of documents for long-term archiving or PDF/UA for people with disabilities.

These needs constitute complex output challenges. Both physical and electronic documents rely on data from different channels across multiple platforms. Some may require conversion of legacy files to more modern print streams so documents can be produced efficiently and cost-effectively. Increasingly, end-to-end output management systems are required to ensure the six imperatives of accurate and reliable document production:

1. Streamlining data and document processes.
2. Centralizing and controlling data and documents (as well as the devices that process the data).
3. Achieving efficient IT processes and reducing costs.
4. Delivering data and documents that are accurate and useful for recipients.
5. Efficiently processing siloed data from departments across the enterprise.
6. Maintaining full compliance despite the complexity of industry regulations.

This last point is especially important. According to IDC's Worldwide Compliance Infrastructure report spanning 2009-12, some 35 percent of the digital data produced in 2012 was for compliance intensive purposes. As regulations increase, ensuring compliance is a critical component of document output management.

Many companies, for examples are challenged by the conversion of large volumes of content (data) from multiple sources into a single efficient system that makes document production more accurate, efficient and cost-effective, regardless of the medium used for delivery. Others face difficulties in making sure changes are made correctly as documents are updated. Still others seek higher levels of automation to streamline processing.

Yet, for many companies, output management remains a collection of disconnected applications that create, modify and convert documents for various output channels. Often, these applications operate on disparate platforms and use data streams that are difficult to coordinate. But these are not insurmountable challenges. Each of the following companies had a document output challenge that was solved using Compart DocBridge technology, which is designed from the ground up to address specific aspects of document output management.

5 Stories of Document Output Success

1. Mastering Legacy Data on Modern Print Streams: World Marketing, Inc.

- Improve efficiencies and cost-effectiveness
- Solution: Compart's DocBridge® Mill and Delta

The Challenge:

World Marketing Inc. a subsidiary of the Omaha-World Herald, a Berkshire-Hathaway company, is a premiere end-to-end provider of quality direct mail, fulfillment, and critical document solutions. A new customer presented World Marketing (WM) with a common challenge faced by many organizations today: taking considerable amounts of legacy data, converting it into modern print streams, and generating new documents with increased time, process and cost-efficiencies. What was needed was a way to run these older files on more advanced laser printers.

Additionally, World Marketing needed to ensure the accuracy of data through automation, bypassing the manually intensive processes generally associated with document comparisons. Other requirements included automating the comparison process, maintaining order of mail pieces, controlling and limiting spoilage, and managing the re-run process.

The Solution and Benefits:

To handle the legacy data issue World Marketing initially chose to write their own code to address their client's challenges. This allowed conversions of old file formats into modern data streams but was inefficient and could not handle all document formats. It became clear that a more cost effective and efficient approach was needed. Compart's DocBridge Mill provided some immediate benefits:

- Robust file (input/output) conversion capabilities
- Increased processing speeds capable of handling large volume jobs
- Time required for file conversion reduced from hours to minutes
- Ability to use newer printers

To address and manage document comparison, WM chose Compart DocBridge Delta. This allowed them to automate the quality assurance process and included other benefits:

- Document comparison
- Identifying differences at word-for-word and pixel-to-pixel levels
- Match critical data between new and older versions
- Ensure accurate communications to recipients
- Switch output device without the need to reprocess files

World Marketing found it was easier than expected to integrate conversion and comparison software into their workflow. User adoption is high and WM has begun phasing out other products as they expand the use of Compart DocBridge Mill and Delta.

2. Raising the Bar on Variable Data Accuracy and Efficiency: Data-Mail

- Improve accuracy and efficiency
- Solution: Compart DocBridge Delta

The Challenge:

Data-Mail is working with clients in the finance, insurance, utilities and healthcare sectors. Therefore, accuracy and accountability are vital. As a full-service direct mailer that produces over a billion pieces of correspondence annually, much of this information contains complex personalized variables and customer data.

Compounding the challenge, documents change constantly making traditional proofing methods costly and time consuming. Data-Mail sought a new validation process that would go beyond the basics when comparing documents to recognize subtle differences surrounding the data such as construction, positioning and embedded data.

The Solution and Benefits:

Testing Compart DocBridge Delta, Data-Mail ran comparison tests utilizing several documents to see how it would work with real materials. Proofing speed immediately increased, as did overall accuracy and efficiency. The process improved further as Data-Mail began using PDFs optimized for comparison.

When documents are created, DocBridge Delta compares the original documents to new versions to identify any changes. The quality control process can be altered internally to meet client requirements without disruptions to the proofing process. Data-Mail can now check more pages and handle audits faster and with greater accuracy than when using traditional methods.

3. Increased Confidence in Variable Direct Mail Proofing and Production Quality: Japs-Olson

- Reduce overhead on every job
- Solution: DocBridge Delta
<http://www.compart.com/en/japs-olson>

The Challenge:

Japs-Olson, a large provider of direct mail and commercial printing services, was searching for ways to improve proofing and approval processes for customers' variable direct mail communications. Other challenges included simplifying the information used in production and increasing uptime for variable imaging.

The Solution and Benefits:

Japs-Olson chose Compart's DocBridge Delta for comparison and proofing but had additional requirements that necessitated the use of a software development kit (SDK). Able to catch even minute changes that manual processes could easily overlook, Japs-Olson built four custom applications that eliminated hours of labor and increased accuracy in the areas of review and production.

- **Color coded highlighting** to differentiate those areas of a document which are variable as opposed to static. This automated a manual process saving time, creating needed efficiency and accuracy.
- **Hot Spots** is a precision application that identifies a printed area pixel-by-pixel. It allows Japs-Olson to quickly and easily show print placement throughout a press run so print heads can be positioned for optimum performance.
- The **Pixel compare tool** allows users to pinpoint specific regions of a page when comparing two documents. If a difference is found, the Pixel Compare tool sends an alert to warn technicians of the potential problem. The documents do not have to be identical for comparison because the tool targets specified personalized regions for comparison.

- The IJPDS line segments application is related to the Hot Spots function, giving press operators a numerical value to determine start points to precisely position print heads. Prior to automating this process, manual visual inspection and repeated adjustment were needed to ensure accuracy. Now the correct print region is automatically determined saving time and labor.

This added functionality gave Japs-Olson an improved quality control process that was efficient, accurate and that would reduce overhead would on every job.

4. Taking Statement Automation to the Bank: Bluegrass Mailing

- Achieve accuracy and efficiency for better customer service
- Solution: DocBridge Mill Plus
<http://www.compart.com/en/bluegrass-mailing>

The Challenge:

A regional Kentucky bank was overwhelmed with outdated manual processes that interfered with statement printing and production. The manual process of collecting statements was dysfunctional and statements had to be obtained from 10 different locations. Each site had its own systems, data and envelopes that compounded the problem.

Searching for a better way to handle these processes, the bank went to Bluegrass Mailing in Lexington, Kentucky. Initially, Bluegrass gathered the statements and transported them to their facility where each statement was metered, presorted and mailed, but this was an unwieldy and manual process. Bluegrass wanted to automate and consolidate statement workflow. Having files sent from the bank in PDF format was one option but was problematic because the files were so large, and Bluegrass still needed to convert the PDFs for printing.

Using DocBridge Mill Plus, Bluegrass was able to significantly streamline the entire process.

The Solution and Benefits:

Keeping track of statement integrity:

- Ensures all documents are prepared correctly
- 2D barcodes and tracking reduce time and money wasted on reprints

Preparing workflow for intelligent inserting:

- Data stream management capabilities breaks the print stream into mailing order so operators can set downstream postal meters for rates and do flats manually—keeping workflow organized and creating efficiency.

Forging a tighter bond with customers:

- Automation helped to modernize the bank's statement production
- Fast turnaround helps ensure customer satisfaction
- Bluegrass strengthened the relationship between the bank and its customers

Bluegrass Mailing has an established track record of adapting and growing to keep up with market opportunities. This application solution joins a long line of successes that have kept the company at the top of its game.

5. Converting Complex Data into Manageable Print Streams: EPSIIA

- Save time and free up resources with operational efficiencies
- Solution: DocBridge Mill Plus
<http://www.compart.com/en/epsiia>

The Challenge:

EPSIIA is well known for providing solutions that manage large amounts of data and process it with great speed and accuracy. Companies across all verticals turn to EPSIIA to help them securely present documents on the web, via email, or on media such as CD or DVD. Some financial institutions also use EPSIIA's services for internet banking or eBanking.

Information received from clients goes through a proprietary system that indexes, encrypts, ingests, interprets, compresses and stores data. Data comes in varying formats and internal applications and data management best practices are used to process most formats. However, for the complex variable formats like Postscript and PCL—and to establish digital co-existence—EPSIIA uses Compart DocBridge Mill.

Although EPSIIA has custom tools and development processes to manage conversion and print streams it was becoming more challenging to keep up with customer demands. The use of DocBridge Mill allows EPSIIA to spend less time developing tools to address customer needs and focus more on delivering the appropriate solution for the client.

The Solution and Benefits:

DocBridge Mill provides these benefits:

- Reduced data development time from 6-8 weeks to just a few weeks
- Frees up application development resources for other projects
- Reduces implementation time which allows getting jobs into production quicker
- Helps maintain SLA's and aggressive turnaround time
- Most comprehensive management of print stream outputs
- Ability to convert complex data with a high level of accuracy

Compart's DocBridge Mill gives EPSIIA confidence in data conversion and meeting commitments to customers.

The Compart Solution

Companies from around the world have found improved efficiencies and cost-effectiveness in their output management systems with the leading edge products from Compart. Centralization is the key to control in output management. With one central hub and one system, output is delivered to required standards with greater efficiency. Compart systems centralize and streamline output management processes so data is processed reliably and in cost-efficient ways. This allows more control and delivery that is consistent and reliable.

The complete portfolio of DocBridge products (DocBridge Pilot, DocBridge FileCab, DocBridge Queue Processor, DocBridge Mill Plus, DocBridge Delta and DocBridge View) provides efficient and reliable solutions to companies across the globe. DocBridge solutions enable users to perform complex document conversion and optimization without being an expert with legacy, contemporary, “X” based or business formats, with complex, single-pass processing capability.

DocBridge products can be deployed as standalone solutions or flexibly integrated with existing IT infrastructure and applications. Because of the modular design, they can be easily combined according to customer requirements to enable tailor-made output management solutions.

- DocBridge Pilot manages and optimizes channel delivery of all your documents and output. It provides centralized tracking, piece-level control and multi-channel delivery—while also reducing costs.
- DocBridge FileCab integrates with DocBridge Pilot to manage the processing of decentralized documents.
- DocBridge Queue Processor is a generalized solution to manage and optimize output management processes.
- DocBridge Mill Plus quickly and easily modifies converts and optimizes documents and output.
- DocBridge Delta is the enterprise output QA platform for programmers and business users.
- DocBridge View easily displays and navigates documents in a universal viewer. It allows you to quickly and easily display electronically saved or archived documents in any format.

About Compart

Compart is a leading global provider of Multi-Channel Document Management Solutions.

Headquartered in Germany, with subsidiaries throughout Europe and America and a partner network in Latin America, for over two decades Compart has consistently helped businesses improve operational efficiency with fast and flexible processing of high-volume data and document flow.

Compart's scalable and platform-independent DocBridge® software - designed, built and supported by Compart - delivers bespoke output, on paper or digitally, anytime and anywhere they are required.

Compart is recognized as an industry leader in driving innovation and delivering world class solutions, with more than one thousand clients in more than 42 countries across the banking, insurance, retail, print services, utilities and telecommunications industries. Compart has been chosen as an exclusive technology provider by leading vendors in the industry.

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