

Lose the paper, get right to the data

Even in large companies, the problem of how to strictly separate document creation from document delivery has not been satisfactory solved. Yet it's a must for generating "intelligent" documents for every physical and digital channel. An appeal for output management as the central hub in customer communications.

(running text)

In many companies, the problem in document processing is heterogeneity – too many dissimilar parts. For one thing, a number of different text processing programs are often in use, which makes standardized document creation more difficult – and every change, to the corporate design for example, has to be made individually. For another, dispatch is often decentralized. The departments often send out their own mailings, typical in companies that have grown quickly through acquisitions and mergers. If, however, the documents were bundled and output centrally, costs would drop markedly, among other things due to better utilization of standard bulk mailing rates.

Furthermore, many companies program how the document is to be sent in the source application. As long as there is only one output channel, costs are contained. As the number of communication paths grows, however, so does the complexity of document output. What happens if the communication channel needs to be changed quickly, say if the recipient no longer wishes to receive invoices by mail, but electronically? What happens if your internal printing/finishing line suddenly goes down and you have to contract an external service provider virtually overnight? Each and every time, the system has to be reprogrammed at great cost and effort, a nearly impossible task for the processor, who usually has little programming know-how.

Disengage creation and output

A more efficient, and ergo much better, approach would be to completely decentralize output management (OM), strictly separating document creation from document dispatch. Application development would concentrate on implementing the technical requirements for document creation, whereas conversion, modification and output would fall to the central output service. Not only does the department benefit from the release from programming tasks, but a central hub also provides a reliable overview of what documents have been sent out in a certain time frame. Other criteria can also be monitored, of course, an advantage not to be underestimated: most firms lack an accurate picture of just how much is printed, faxed, and sent electronically. What document management is missing is the 360-degree view, which you get through central control of the output of physical and digital mail. With centralized output management, an electronic outgoing mail ledger can be set up to log

exactly what documents leave the company, their quantity and the transmission channel used. In turn, that data points to other potential optimization measures, such as whether some of the physical mail could be digitized.

The fact is that centralizing document logistics offers real benefits. Doubtless the most significant benefit is that the programming of output channels is done only once, and not for every application as in the decentralized method. Furthermore, it's possible to switch over to another output channel at short notice, should a customer want his or her insurance policy digitally instead of in hardcopy form – a very common scenario. What is standard today for transaction documents such as invoices, account statements, etc. could soon apply to contracts, policies, and the like. Delivery of the latter must be verifiable, which is why paper still predominates here. And there are certainly still differences between physical and electronic dispatch with respect to legal effectiveness and probative force. Once electronic mail fully meets the requirements for data security and legal compliance, it will undoubtedly come to supercede hardcopy.

From the outlet to the source

With the output management system as a hub, new communications channels can be added at any time. Even social media can be used in business, to communicate with young people, for example. The globetrotter in a hurry for health insurance to travel abroad certainly appreciates being able to contact his provider of choice through Facebook. The policy can then be sent as an E-Postbrief or De-Mail. Why not? Multi-channel capability and rapid switch of output channel are major advantages of a centralized output service. For document creation, this means a departure from the A4 format and generating content for electronic output devices too, regardless of the size of the display or screen. In the business world, the PC tablet, iPad, smartphone, etc. are ubiquitous.

The problem with many of today's systems is they assume the A4 format, which is designed for the standard print and archive channels but is ill-suited for the new digital media. Instead of providing full pages, it would be better to deliver the raw data in XML format, since meta-language is best-suited to platform-independent data exchange. The actual preparation, i.e., formatting, conversion and output, occurs in the central output instance. In other words, the boundary between document creation and output shifts; selecting the page size and the output channel occurs further downstream than it typically does now. This comes with a paradigm shift: the applications for creating documents must be controlled by the central OM system. Output management is no longer confined to the print center, even though that is where many companies still relegate it. Today, we need to get closer to the "source", to where the data originates.

Not everything all at once

More and more companies recognize how important separating document creation from dispatch is. Centralizing heterogeneous OM structures should be done incrementally, building on existing applications and workflows: a herculean task without an experienced service provider. The more applications and departments involved in document creation, processing and output, the more expertise the partner should offer. One important factor in this

modernization process is choosing technologies that make adding more output channels and data formats easy. Cue HTML5, the text-based markup language already setting the tone with mobile platforms such as the iPhone, iPad and Android devices. It's a "no-brainer": HTML5 content can be easily processed for any electronic output channel, be it a smartphone or a Web site. And if print is your preference, it's still an option. Conversion to PDF files of any page size is also possible. HTML5 is currently the most intelligent format for the creation and display of documents, regardless of size or output channel. It allows reformatting, e.g., from A4 to smartphone display, or conversion from page formats to text-oriented formats. Individual data can be extracted (including retrieval of invoice items) and table of contents and index lists can be built. And there's more. With HTML5, even audiovisual elements, Web links and charts can be embedded. This creates not only multi-channel-capable documents, but intelligent documents that offer users added value beyond just display of text.

From print center to communications center

Finally, this issue is not strictly a technical one; above all, output management is a way to optimize communication with the customer. The innovation lies in the ability to communicate with the customer via any channel and to switch channel at any time. The output manager must ergo evolve from a print and processing specialist to a communications manager, always in line with the needs of the recipient and the strategies of the company. Even in the most conventional of fields, print, the output manager faces new challenges. Take color, for instance. As long as computer output consisted of black numbers and letters, the requirements were manageable. The main thing was that text was legible. Industries across the board are now using machines that print in full color, create photorealistic graphics, and react very sensitively to the application of different inks, toners and substrates. Colors in every form on untreated and coated paper, the diversity of digital print technologies post-Drupa 2012 – these add to the overall complexity of new, continuous color printing in document management.

Against this backdrop, output management is an integral IT discipline that goes well beyond traditional printing – it is becoming a center of competence for corporate communication itself.

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