

CCM GATEWAY FOR NUXEO

Customer communications archiving and e-presentment for Nuxeo

Business Issues

Each year an estimated 100 billion business documents are delivered in the US and Europe. These customer communications include statements, letters, invoices, policy documents, and many more document types that are essential to maintain relationships with customers.

Business documents are produced by enterprise applications and document composition tools alike and are eventually stored in high volume archives and enterprise content management systems. These documents are often accessed through consumer portals and mobile applications, although 80% are still printed and posted.

Superior customer experience is exemplified by provide the right information at the right time in the format that the customer prefers

Solution

CCM Gateway for Nuxeo provides a customer communication archiving and e-presentment service based on the Nuxeo platform. The solution lowers the cost of the archiving infrastructure and allows organizations to retire outdated archival and ECM systems. CCM Gateway increases the value of content by expanding access to customer communications within an organisation and through consumer portals and mobile devices. Managing customer communications in Nuxeo reduces litigation risks and e-discovery costs associated with content

Benefits

- Retaining statements, bills, invoices and correspondence is essential for compliance with industry regulations in banking, insurance and healthcare and for tax compliance.
- Turning customer communications into accessible documents delivers consistent services for the partially sighted and ensures compliance with current regulations, including Section 508, AMA, AODA, the UK and EU Equality Acts.
- Reducing call center of volumes and improving customer services are integral to improving customer experience.
- Replacing complex, mainframe systems for archiving and e-presentment with modern, next generation digital systems is an important step in any organizations' digital transformation.

Essentials

- CCM Gateway for Nuxeo captures high volume customer communications created by business systems and document composition tools
- Customer communications generated as line data, AFP, Metacode, PostScript, PCL or PDF formats are either archived in their original format or converted into PDF/A for long term archiving
- Content can be enhanced with accessibility tags, converted to accessible document formats to be used by screen readers to provide for the blind and visually impaired.
- Indexing templates identify individual documents in the print spool, ready for archiving in Nuxeo.

Solutions Overview

Archiving Workflow

CCM Gateway supports end-to-end archive workflows including file capture, document transformation, indexing and finally storage in Nuxeo. Archive workflows identify different document types and route them for appropriate processing. This means different rules for transform, indexing and storage can be based on document type.

Format Support

Customer communications are produced in formats such as line data, AFP, Metacode, PostScript, PCL or PDF, which in many cases are suited to print but are not optimized for archiving and viewing. CCM Gateway can store the original print content in compressed archive files and are commonly converted to PDF/A for long term archiving.

Indexing & Data capture

Customer communications files can contain thousands of individual documents. Documents in the files need to be identified and indexed so that the documents can be retrieved in the future. CCM Gateway supports a range of indexing techniques that identify documents for future access.

Fine Grained Records Management

CCM Gateway for Nuxeo stores individual documents (as opposed to large batches) which allows full control over records management. Increasingly, regulations such as GDPR require fine-grained records management and CCM Gateway ensures Nuxeo's document storage strategies and policies can be applied while optimizing storage costs. Retaining statements, bills, invoices and correspondence achieves compliance with industry regulations in banking, insurance and healthcare and for tax compliance.

e-Presentment – PDF Digital Signatures and Redaction

Nuxeo finds and retrieves documents in the archive for use in online portals and mobile applications. e-Presentment services can be used to apply digital signatures or redaction to support regulatory conformance.

Accessible Documents

CCM Gateway supports both accessible PDF and HTML, which can be used to support end-users who are blind or partially sighted. Turning customer communications into accessible documents delivers consistent services for the partially sighted and ensures compliance with current regulations.

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Ask yourself?

- Do you have a customer communications archive, report archive or COLD system or a need to retain customer communications?
- What ECM or archiving systems are being used?
- What types of documents do you archive?
- What formats are the documents generated in?
- How many documents do you generate and distribute each month?
- How many documents are in your archive or ECM system?
- Do you need to comply with Section 508 guidelines for accessible customer communications?
- What is the typical retention period of your reports?