Document-Direct Outline	
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1.   Introduction

Document-Direct provides a reliable, secure and comprehensive on-line document composition, production and delivery system for complex and compliant documents and document packages such as kits. Your organization can utilize this web-based application to select, customize, produce and deliver document packages from anywhere, to anywhere using any delivery channel.
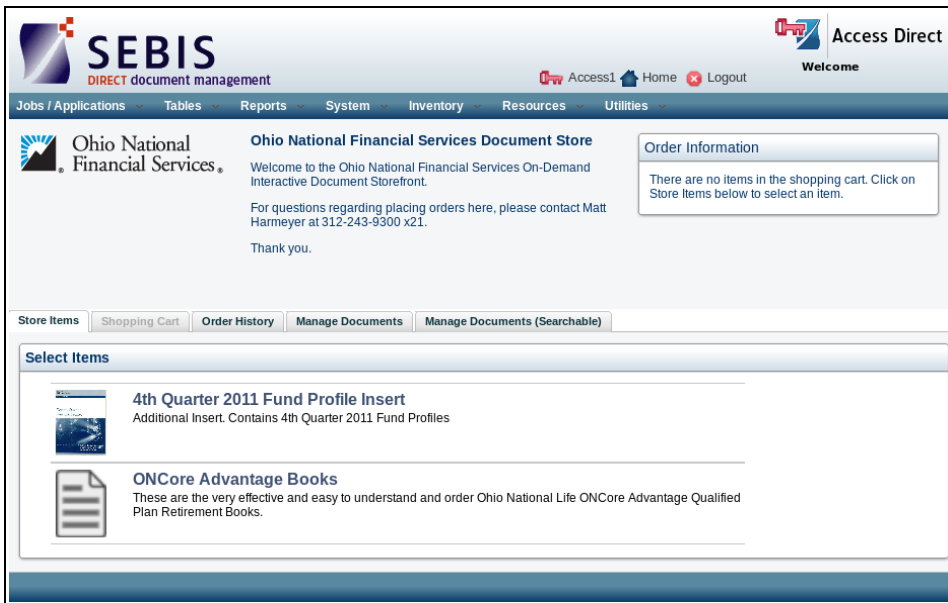
***Document-Direct* is your web based Print-on-Demand document solution.**

Upload, edit, create, approve and deliver complex documents, enrollment kits and technical or compliant documents of all types using a web browser.

Electronic Print-on-Demand using the Sebis *Document-Direct* system will create new efficiencies and speed document workflows for your organization.

Provide control of document creation, approval, management and production directly to the business owners.

By replacing traditional methods, your organization can obtain savings in delivery times and money. With web enabled Print-on-Demand methods, including order management and customization of documents, there's no need to order materials in advance. Costs incurred for additional warehouse storage and releases go away.

Print-on-Demand allows updates to versions of documents easily without discarding pre-printed stock of the previous version.

Enterprise Content Management (ECM) technologies provide version control and the full range of access controls larger organization require.

Documents can be mass customized/personalized using your databases uploaded to *Document-Direct*.

Materials are created online exactly when needed. Any document can be imaged and finished within hours of placing the order. *Document-Direct* stores electronic versions of your documents along with any and all finishing, bindery, assembly or kitting specifications. By utilizing digital imaging, documents and related items can also take advantage of customization. Complete command and control of all your activity is also provided.

The Sebis *Document-Direct* utilizes strict controls and auditing for compliance with HIPAA, SAS, FDA, and other regulations. All documents creation and production workflows are fully accountable and auditable.

Document-Direct provides full document creation and composition control with modern web 2.0 interfaces. Creating a new document package starts with selecting an item in the storefront. Once the document type is selected, a three step process creates the document package.

Step 1: Edit Document
The user provides answers and values to all of the directives used by the document package.

A document package is broken down into sections. These sections are each controlled by directives provided by the user.

Examples:
- Text values
- Upload or select logo Images
- Upload or select graphics
- Dates, Numeric Values, etc.
- Select from form and content libraries.
- Full rich text editing including fonts, underlines, bold, italics, etc.
- Select pre-programmed decisions such as type of cover letter.

Upload forms of any kind. These forms include properties that control their use in the document.

Examples:
- Must start on a front side
- Cannot share a back side
- Print in duplex or simplex
- Print in color or black only.

Step 2: Examine the Document
Once all of the directives are entered, the user can fully examine the document package. A PDF of the document will be provided. The PDF can be viewed or printed locally in full color. The user can go back to editing the document to make further changes. This can be repeated as much as necessary until all of the directives are correct.

Step 3: Confirm the Document
When editing is completed, the document package is confirmed. It is placed into a shopping cart.

Once a document is confirmed, further approvals may be required before it is released and delivered. *Document-Direct* supports complex approval workflows. Once confirmed, all directives that are provided and selected are permanently recorded.

Complex Workflows
Your organization can have complex creation and approval workflows so that document creation can be collaborative and workflows scope authority to manager users with the authority to approve.

Upload Merge Data
Upload datalists from databases or spreadsheets to create mass customized or personalized document sets.

Document-Direct provides full document creation and composition control with modern web 2.0 interfaces. Creating a

new document package starts with selecting an item in the storefront. Once the document type is selected, a three step process creates the document package.

Document-Direct works like a storefront. Select and customize each document. Each item adds a document order to a shopping cart.

When all items are specified, checkout in a manner similar to many web transactions most people perform.

Complex Approvals.
Document-Direct supports complex approvals. The system provides the documents and all of the document directives, (selections, text, included document components, etc) for manager-users that have an approval role.

Payment Options.
Document storefronts are generally closed to the public. Access is available only to a selected group of users. If required, payments can be collected.

As an alternative, other payment options are available.
- Charge to an internal account.
- Submit order for an approval by a manager or user agent with the proper authority.
- Collect funds using VISA, MasterCard, American Express, and Discover
- Electronic Checks

After all documents have been selected, edited and approved, any shipping and distribution options can be provided.

Data can be uploaded that distributes the documents to individuals. All documents can be shipped to a single or multiple locations.

Custom Document Directives.

An incredible variety of document controls are available:
- Full rich text web editor (shown previous page). This allows users to select fonts, underline, boldface, italics, font size, etc. for text in a content container within the document.
- Non-rich text. This is used when the user should not control type and type markup. Allow free text to be input.
- Character fields of any type. (Dates, strings, amounts, etc.)
- Select document. Include or exclude any number of documents. Examples would be fund descriptions in a qualified plan.
- Logos and graphics. Select from any objects stored in the repository.
- Add items to the package. Select reply envelopes, external forms and other insert items to be included in the envelope.

Users can examine the directives that were provided to create current and past documents.

3. Document Component Objects Repository

Document-Direct provides a full repository to store and manage document elements such as forms and graphics and data used by document packages. This process is started by creating a document content model that understands and defines the way your organization manages documents.
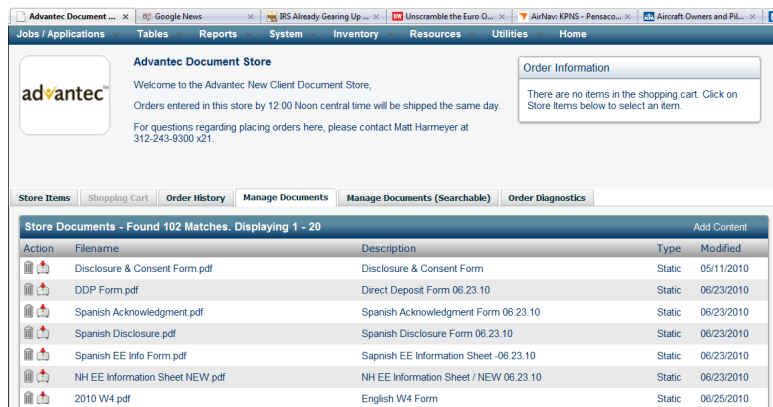
Each organization manages its documents using its own terminology, business rules, customer codes, internal ids, document types, etc.

The backbone of *Document-Direct* is the Alfresco Enterprise Content Management (ECM) system. This system allows *Document-Direct* to adopt your organizations document management methods or create new ones that fully describe the aspects and properties of document components available to your users.

Complex documents packages such as enrollment kits and qualified plans are composed from subsets of approved document components. These components can be fully composed documents themselves or just component objects such as graphics, logos, text blocks, etc.

Agents and users of your organization must have the ability to fully administrate these objects. *Document-Direct* provides a full repository system for this purpose.

Document Object Search
Search for documents objects using your organizations terms and classifications. Default search functionality is provided on common elements such as document type, dates, document IDs.

Agent Management
Manage the creation, deletion, and modification of agents. Agent roles can be customized.
- Group by entity (location, region, area of responsibility)
- Define access by role and configurable groups.
  - Managers
  - Supervisors
  - Customer Service Agents

Platform
Back-end repository is the Alfresco Document Management engine.

Taxonomies
Support of any method of identification, naming, and classifying of documents objects. Search for items in ways that make sense to your organization.

Upload Objects
Upload forms, logos and document objects of all types. Also add and edit object properties. Properties include your organizations classification names as well as physical properties and aspects such as color, black/white, share back sides, start on front and perforations.

Document-Direct can deliver documents to recipients via multiple channels.

eMail Link.
A notice is sent to the recipient from your organization. The notice informs the recipient that he/she can click on a link and retrieve the document. This is a very secure method because documents are not sent by email.

This email can contain relevant and timely content in addition to the notice.

eMail the Document.
In some cases, it is desirable to send the document as an email attachment. This method is generally used if little or no security or protection of personal information is required. The document attachment itself may be password encrypted.

Multiple Attempts Are Made.
4 attempts are made to email your recipient. These attempts are timed 6 hours apart. This is done to mitigate any temporary failures of email systems.

Compliant Fax.
Faxing certain document or notice types can be performed in a compliant manner. This channel is available and is fully auditable.

Paper Delivery.
Most documents are delivered as inside delivery or USPS. Many notices or document types must be paper mailed.

Certified Mail.
Full electronic certified mailings are available. Certified mail interfaces with document management providing on-line records of USPS tracking and delivery events including signatures.

Package Delivery.
Document-Direct can be connected to any freight carrier. Your organizations freight carrier accounts can be directly connected. USPS CAPS system can be used.

Channel Fail-over.
If all attempts to email fail or fax fail, *Document-Direct can failover to other delivery channels such as paper mail or even certified mail.* The document may contain a message indicating that the email or fax failed and asks that the recipient update contact information.

Application / Run	Monday 04/13/2009	Tuesday 04/14/2009	Wednesday 04/15/2009	Thursday 04/16/2009	Friday 04/17/2009
Advocate Healthcare Invoices Run: 20090410 All Completed		✉ Assembly & Mailing (AMECH): Completed 7:45AM Delivered: 7:00PM			
Advocate Healthcare Invoices Run: 20090417 Some Completed					⚡ Process Ran: 5:56PM ✓ Process Approved: 5:59PM
Advocate Health Collection Letter Run: 0804132009 All Completed		⚡ Process Ran: 9:56AM ✓ Process Approved: 9:56AM 🖨 Printing (MAIN): In Progress 1:12PM 🖨 Printing (MAIN): Completed 1:21PM	✉ Assembly & Mailing (MAIN): Completed 8:29AM Delivered: 7:00PM		
Baylor Medical Statements Run: 20090416 All Completed				⚡ Process Ran: 1:07AM ✓ Process Approved: 1:11AM 🖨 Printing (CMECH): In Progress 10:58AM 🖨 Printing (AMECH): In Progress 11:20AM 🖨 Printing (CMECH): Completed 12:50PM 🖨 Printing (AMECH): Completed 1:33PM	✉ Assembly & Mailing (CMECH): Completed 8:29AM Delivered: 7:00PM ✉ Assembly & Mailing (AMECH): Completed 8:34AM Delivered: 7:00PM 🖨 Printing (CMECH): Completed 10:33AM

Track the progress of document creation and production.
Examine a dashboard that provides the status of all document processes. See exactly where each document runs.   The dashboard shows that production is in progress or all completed.

Document-Direct incorporates the Business Intelligence and Reporting Tools Project (BIRT) for its reporting and data extraction capabilities. BIRT is an Eclipse-based open source reporting system for web applications.
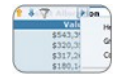
Any custom report or data extraction can be easily provided. Reports can be listings and can include any structures including charts and graphs.

See www.eclipse.org/birt/phoenix/ for details.

Platform
Business Intelligence and Reporting Tools (BIRT).

Output Formats
Reports can be output as HTML, PDF and raw data.

Storage
Reports can be viewed in real time or stored in an agent repository. Stored reports may be kept for as long as necessary and retrieved and viewed only by agent users granted this role.

Automated Reporting
An agent user may set-up any report to run automatically at a variety of frequencies and times. The agent may select a report to run daily or as infrequently as monthly. The specific day of the week and time of day, etc. can be specified. Time spans such as data for last week or last month can be specified.

Security
Every report and its output and the scope of its views of data may be configured to support any scheme of agent user hierarchy.

Data Extractions
This tool can be used to extract raw or compiled data in plain delimited form to be used by your organization's own spreadsheets and reporting tools.

Standard Reports	
Application History Report	Detailed aggregation of each document run. Exports include HTML and data.
Repository Summary	A detailed listing the contents of the repository. Includes total quantity of documents loaded in the repository. It totals each day and it totals the entire reporting period.
Mailing Production History	Postage and freight accounting detail over any timespan.

6.   Document Viewer

As an option, *Document-Direct* can provide a full document repository. After approval and delivery, documents become records. These records can be managed by your organizations systems or use *Document-Direct* for this purpose.

Any Number of Views
Document-Direct uses thin client techniques to provide views of documents.

No PDF Viewer Required
Documents are displayed using Flash animations or HTML5. No PDF viewer is required on the browser or mobile device.

Same As the Paper – Or Not!
Documents can precisely match the paper renditions or be optimized for various forms of web and mobile device views.

Document Properties and Metadata
All of the metadata, aspects and properties of the document are displayed in the upper right. If the document is a statement, each of the statement invoices can be viewed.

Events
The bottom of the page shows all of the events that are associated with the document. See when the document was mailed, viewed, emailed, paid, faxed, etc. Who performed the event and when each event is also recorded.

User Delivery Actions
The document can be emailed, faxed or even re-mailed (optional)

Security
Document displays and deliveries are fully encrypted. All user events are recorded.

Rendering Format
The document is presented as either a Flash animation or in HTML5. No PDF viewer is necessary. The user can see the document on a full screen, switch pages, increase or decrease the zoom of the view. Works on Apple® devices.

Email an encrypted PDF
The document recipient selects a password. The password is used to encrypt a PDF that is then attached and emailed to the recipient. When the document is emailed, the recipient enters the password and can then view the document.

Download PDF
Download a PDF of the bill for local viewing and printing.

7.   Interfacing With Current Systems

Document-Direct can be easily connected to your organization's document management system. Once documents are approved, produced and delivered, *Document-Direct* can transmit a bulk upload of documents and document metadata for ingestion.

The Screen True Press provides and extends *Document-Direct* print capabilities. The True Press is a roll-to-sheet digital press that provides inline duplex full color printing up to 20" wide with dynamic perforation and slit, cut, stack finishing at up to 420 FPM.

Technology

Imaging
Full duplex 4 color aqueous ink-jet.

Speed
420 feet per minute duplex yields over 2.5MM 8 ½ x 11" impressions per day.

Color
Black and full color (CMYK).

Bleeds
Can provide full bleeds or use its native edge-to-edge printing capability.

Integrity
Front to back side integrity is secured by printing and scanning internal barcodes on the edge of each page. This barcode is then slit off at the finishing stage. The front and back sides must match.

Perforation
The Truepress line can produce simple and complex perforations. Perforations can be horizontal or vertical or both. Perforation is dynamic and applied only to pages that require it.

Resolution
The maximum imaging resolution is 720 dpi X 720 dpi with 4 levels of dot size.

Advantages

Books
Obsolescence printed and bound without collation. Tearout pages and forms can be perforated dynamically.

Obsolescence
Forms and materials are printed as required. Forms cannot become obsolete.

Dynamic Color
Traditionally, forms have been printed in color and then imprinted by black laser printers. Color elements of forms were static. Dynamic color required multiple versions of the form. Color elements of forms can now be fully dynamic and change from one to the next.

Color mass customization is now cost effective.

Cost
It's much much lower cost than IGEN, Nexpress, and similar photo-receptor type print devices.

Sebis backs-up Document-Direct with a full range of document production, assembly and finishing capabilities. All of the processes are fully controlled auditable and secure.

ID Cards

Plastic (PVC) and TESLIN ID cards. All web-2-print features are available. Cards can be affixed to carriers and inserted.

Full color (TESLIN)
20 – 30 mil PVC and TESLIN

Books and Booklets

Perfect Binding with scoring and side gluing
Up to 1200 books per hour
In-line and offline booklet making
Variable book blocks
ID cards can be affixed within books

Large Format Printing
Up to 42" width
Black and full color

Self Mailers
Postcards and double postcards
In-line glue folding.
Pressure sealed documents.

Ink Jet Addressing
600 x 600 dpi black and highlight color. 25M / hour.

Checks
Xerox and Kodak MICR print capability in both Sebis locations.

Black Laser
Xerox and Kodak black lasers provide conventional photoreceptor laser printer output at 600 dpi and full duplex. All devices equipped with 4-6 input paper trays.

High Speed –
High Integrity
Inserting Assembly
Bowe Bell+Howell systems with 3x9 and 2D barcode features provide document integrity capabilities that meet the highest privacy and security requirements.

Document-Direct is built on world class tools and technologies. Early versions utilized mainly home grown code and modules. *Document-Direct* now utilizes technologies from these best-in-class open sourced resources. This allows Sebis to participate in the collaboration of developers worldwide. This results in a more compliant and secure application because the security models and technologies are widely adopted and collaborated on from a worldwide community of mission critical enterprise content management developers.

The adoption of these platforms permits rapid development and customization. Much of the application's functions are object oriented and brought-in rather than requiring local development.

Document Presentation
Used to compose and produce simple to the most complex bill and statement documents.

XEP Engine is the formatting force behind document composition and production. Complies with the World Wide Web open source XSL:FO definition.

Rapid Application Development
Adobe Coldfusion is the back-end language used to quickly build and modify the web interfaces used for simple to the most complex document interfaces.

Once all business rules are known for the document, a Coldfusion form and validation module will be provided to support those rules.

Database
PostgreSQL is a powerful, open source object-relational database system. It has more than 15 years of active development and a proven architecture that has earned it a strong reputation for reliability, data integrity, and correctness. It runs on all major operating systems.

Document Repository - User Management and Security
Alfresco is built on the strong foundation of a proven, open source enterprise content management platform that has been deployed at over 2,500 enterprises in 55 countries.

Billing documents are stored, managed, transformed and delivered within this framework.

Reporting Tools
Business Intelligence Reporting Tools (BIRT) is an Eclipse-based open source reporting system for web applications, especially those based on Java and Java EE.

BIRT can deliver reports and data extracts of any format from raw data to charts and graphs.

Web Development Framework
Spring is the most popular application development framework for enterprise Java™. Millions of developers use Spring to create high performing, easily testable, reusable code without any lock-in.

Web Server
Since April 1996 Apache has been the most popular HTTP server software in use. As of January 2012, Apache was estimated to serve 58% of all active websites and 65% of the top servers across all domains.

Operating System
Linux has been ported to more computer hardware platforms than any other operating system. It is a leading operating system on servers and other big iron systems such as mainframe computers and supercomputers.

More than 90% of today's top 500 supercomputers run some variant of Linux, including the 10 fastest.