



xDoc Converter

Insurance IT

CambridgeDocs



XML Technologies for Content
Conversion, Integration and Publishing

Insurance Forms and Letters

The IT department of a major Midwestern insurance company was building a new application for handling all of the firm's claims processing and account management. Part of this initiative was to efficiently generate and archive the thousands of customer policy letters that the firm generated each week. Policy letters would include customer-specific account information, current status, and policy coverage information.

Because the original system lacked graphics capabilities, it could generate data-merged forms only in simple unattractive text formats. The new system would offer the insurance company cost-effective generation of custom form letters with high-quality graphics and customer-specific data in a professionally formatted design. The benefit to the insurance company would be an improved customer experience, cost savings, improved flexibility to automatically generate new kinds of customer-specific policy letters, as well as direct, individual customer-based policy customization.

Challenge

The designers faced the challenge of efficiently generating thousands of letters each week, with customer-specific data merged in from their databases, in an efficient, scalable, and stable manner. They were facing several constraints in meeting this challenge. Business operations employees needed to maintain authoring of policy form letters in Microsoft® Word. The project also had to fulfill a new requirement to generate, print, and archive all customer letters in PDF format. This meant a Word-to-PDF conversion at some point during the process. Moreover, the conversion needed to be accomplished in a scalable and reliable manner, embedded in the server-side processing that implemented placement of document graphics, and preservation of text characteristics and document meta-information.

A second constraint was maintenance of graphic formatting within the policy documents. This required development of in-house tools that would be able to access the data from the original document as well as the graphic formatting information.

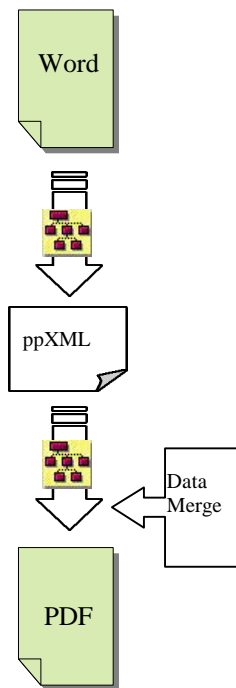
"We examined 15 software tools...Xdoc showed the best fidelity and most accurate rendering in PDF – it was closest to the Word source."

- Tom Bruns, Lead
Consultant,
G. A. Sullivan

A third constraint was filling in empty space around text areas, or re-flow. The Adobe PDF tools, although able to handle some dynamic data, was unable to properly format the text re-flow for documents. Re-flow was a vital issue for the insurance company since policies were extensive and weighted with legal and business considerations - Fine print had to be very fine.

Although the server side architecture was designed in-house, building a conversion component in-house was not cost effective. Purchasing a third-party converter was economically more prudent.

Embedding the xDoc Converter

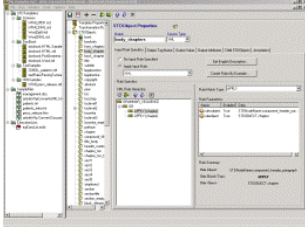


After extensive analysis and product comparison of over 15 tools, the architects chose CambridgeDocs' *xDoc Converter* product. The xDoc Converter provided the greatest fidelity when converting from Word into PDF – the generated PDF files were closest in formatting to the original word document, and re-flowed the text around the inserted data. The xDoc Converter engine pulled appropriate graphics and text meta-information to provide appropriate graphics formatting and text re-flow. Other important criteria included the stability of the product, its ability to be embedded in their server-side processing, compatibility, and the strong customer support offered by Cambridge Docs.

With this tool, the design team was able to convert documents to xDocs' ppXML format, easily insert appropriate data from the customer-specific databases, and convert the ppXML format to PDF. The conversion process allowed storing graphic formatting and text re-flow data to be used when converting to PDF, thereby satisfying the requirements.

Immediate Benefits

With the adoption of the xDoc Converter product, the team was able to rapidly and reliably implement the end-to-end process from Word templates through high-volume custom letter generation to PDF rendering, printing, and archiving. Lead consultant on this project, Tom Bruns, from the consulting firm G.A. Sullivan, offered, "xDoc showed the best fidelity and most accurate rendering in PDF – it was closest to the Word source." The product was easily embedded in its server-side architecture, and proved to be a stable and high-performance solution – easily handling the demands of generating thousands of documents per day. Thousands of customer policy documents being sent on a weekly basis required the power of the xDoc Converter to convert to PDF and allow insertion of



contextual data in numerous customer-specific fields. The most noticeable change was use of graphics, fonts, and type in a rich, presentable format.

Summary

The insurance company required a solution that

- ◆ Preserved user freedom to develop customer letter templates in Word
- ◆ Provided superior accuracy in converting from Word into PDF
- ◆ Could extract graphics and text characteristics information
- ◆ Was easily embedded in its server-side architecture
- ◆ Was stable, high-performing, and reliable

Benefits/Results

The xDoc Converter provided:

- ◆ The flexibility to create well-formatted customer-specific letters, with information dynamically inserted from various sources
- ◆ Improved customer experience from the professional customer communication
- ◆ Compatibility with larger .NET based architecture
- ◆ Stable and High-performance server-side solution
- ◆ Ease of implementation resulting in cost savings
- ◆ Strong product architecture enabled the project team to easily customize server-side processing to meet business-specific needs

For more information about the *xDoc Converter* and related tools and technologies, please contact CambridgeDocs at info@cambridgedocs.com or call (617) 241-5959.

CambridgeDocs, based in Boston MA, is a leader in the emerging market for XML based Content integration

CambridgeDocs

The Schrafft Center
529 Main Street - Suite 110
Charlestown, MA 02129
(617) 241-5959

info@cambridgedocs.com
sales@cambridgedocs.com

© 2003 CambridgeDocs, LLC.
All Rights Reserved.

Logos, products, or service names may or may not be trademarks or service marks of other organizations. This case study demonstrates how one customer implemented the xDoc Converter product. Other factors may contribute to the success in implementation of the product. CambridgeDocs does not guarantee comparable results in all cases. Information contained herein was provided by third party contributors or public sources. Turning Point Renewal Group, Inc. makes no claims as to its accuracy. This case study was prepared for CambridgeDocs, LLC by Turning Point Renewal Group, Inc.