



Crawford  
Technologies

Award-winning  
software and  
services for  
transactional  
customer  
communications...

# PRO Dynamic Document Archive

A solution for the unique needs of  
transactional document archiving.





## Product at a Glance

### What does PRO Dynamic Document Archive Do?

- Automatically processes each incoming print file and places it into the archive file format.
- The archive file is compressed, optionally encrypted, indexed and retains all of the required printing resources and metadata for all documents in the file.
- Archive file preparation includes detection of customer-specific mail pieces within each file for maximum locating and retrieval speeds.
- Prepares an index of unique, customer specific information such as account number, the location of each archive file, and the location of each customer mail piece.
- View pages in the archive using PRO Viewer.
- Through the use of provided APIs any existing system can be updated to locate any customer document and present that document in PDF, AFP, PCL, HTML, TIFF or PNG formats for presentation or printing purposes.

All of this while setting the new industry benchmark for cost effectiveness.

## PRO Dynamic Document Archive

PRO Dynamic Document Archive allows organizations to store, present and reuse transactional documents—such as statements, bills and invoices—to meet all of your customer service, electronic presentment, reprinting, and regulatory compliance document retention needs.

### Background

For many years now, organizations have struggled to meet document archiving and presentment needs for their transactional output. Transactional customer communications typically outnumber all other document types by a ratio of more than 10 to 1.

Although there are many archiving solutions that address the needs of office documents and their workflows, the needs and requirements for transactional customer communications, and the subsequent documents it produces, have largely been ignored.

For many reasons, these documents are very important. They convey how much a customer owes or owns at a given point in time. They inform customers of their interest owing due to overdue payment amounts. They educate customers on specific information about their home, auto, theft, health and life insurance coverage. They can contain detailed financial information about account balances, investment portfolios and their yields, fees, expiration dates as well as other important information.

These documents are often the only communication vehicle used to convey new contractual, regulatory and other changes between your organization and your customers. Moreover, these types of communications are often required, by regulations, to communicate important transaction details. Many of these documents are required by the recipients when they prepare their tax returns, and may also be critical if they are every audited by the tax authorities.

And yet, there hasn't been a strong solution to meet the unique and specific needs of archiving for transactional documents—until now.

*PRO Dynamic Document Archive; achieving what you want for less.*

### Easy to Integrate

PRO Dynamic Document Archive (PRO DDA) runs on all major operating systems and can integrate with your existing customer service, customer portals and other systems quickly and easily. Benefits include making a historical transactional document archive available to your existing systems is significantly easier than other proprietary approaches.

Crawford Technologies is an industry leader with experts in production printing environments, print-stream transformations, document re-engineering and document archival; we can bring all of your existing transactional print data together easily and quickly into this unified archive solution, whether those documents are in AFP, Xerox Metacode, PDF, PCL or Line Data formats. From the archive you will be able to view with PRO Viewer or create content in AFP, Xerox Metacode, PDF, HTML, XML, PCL, TIFF or PNG formats.

With PRO DDA you can easily create the indexes you need to retrieve these documents according to your organization's specific needs and the needs of your customers.

Using your existing file system, your existing database system and easy to implement APIs, you can integrate PRO DDA easily into your existing technology architecture or existing archive platform quickly and easily.

“ Making transactional documents available through this powerful archiving solution will help your organization serve your customers better, reduce your costs, while also meeting your organization’s regulatory and compliance obligations . ”

## Minimizing Your Storage Costs

PRO Dynamic Document Manager uses sophisticated compression techniques that do not impact retrieval speeds. The result is a reduction in your storage costs, which can mean storage savings of up to 90%!

## Fidelity and Accuracy

PRO DDA stores all of the resources and other important document data (Metadata) to ensure the authenticity of what is stored and presented at any point in time:

- The exact fonts, graphical elements, signatures, logos and forms are retained in the document archive to ensure the faithful recreation of each document using the resources that were in place on the exact date and time the document was produced.
- Other important document metadata, such as the paper tray assignments for each page of each document is also retained. This is critical so that correct pre-printed forms are used when the documents are reprinted. This is an essential capability to ensure that your regulatory and compliance needs are met through your transactional document archive.

## Security

In addition to the use of any of your organization’s user security, system access security and other security techniques that you wish to employ, PRO Dynamic Document Archive offers file level encryption up to AES 256 with external key management. This means that PRO Dynamic Document Archive meets the encryption requirements of PCI DSS (version 1.2).

## Fidelity and Accuracy

PRO Dynamic Document Archive was built with performance in mind. It is able to load documents into the archive at rates up to 3 million pages per hour per thread. Each additional processing core on the same computing platform enables the system to ingest additional documents into the archive at similar processing rates.

## When should you consider PRO Dynamic Document Archive?

- You need to present historical transactional communications documents to improve customer service and customer satisfaction.
- You need to store and retrieve historical transactional communications documents to meet your regulatory and compliance obligations.
- You need to fulfill customer reprint requests for their historical transactional documents.
- You need to present transactional documents to enable customer self-service and therefore reduce service costs for your organization.
- You need to provide online viewing of transactional documents instead of printing and mailing them, thus reducing your production, paper and postage costs.
- You have wanted some or all of the above goals, but have been unable to afford any of the available solutions.

## Platforms:

Windows 2000 and higher, Linux with kernel level 2.6 and higher, AIX, HP-UX level 11.23 and higher, Solaris 8 higher, z/OS and Linux for System z.

PRO DDA APIs are available in C/C++, Java and .NET.

## CrawfordTech Solutions

Convert any print-stream to any other, including:

- AFP
- Metacode/DJDE
- PostScript®
- PDF and PDF/A
- PCL
- Image (TIFF, JPG)
- Text, HTML, XML

### Document Re-engineering:

Add or change inserter barcodes, logos, QR codes, marketing messages, Transpromo, human readable information, stream into different output files and move/capture address blocks for sorting and cleansing.

### Document Archiving:

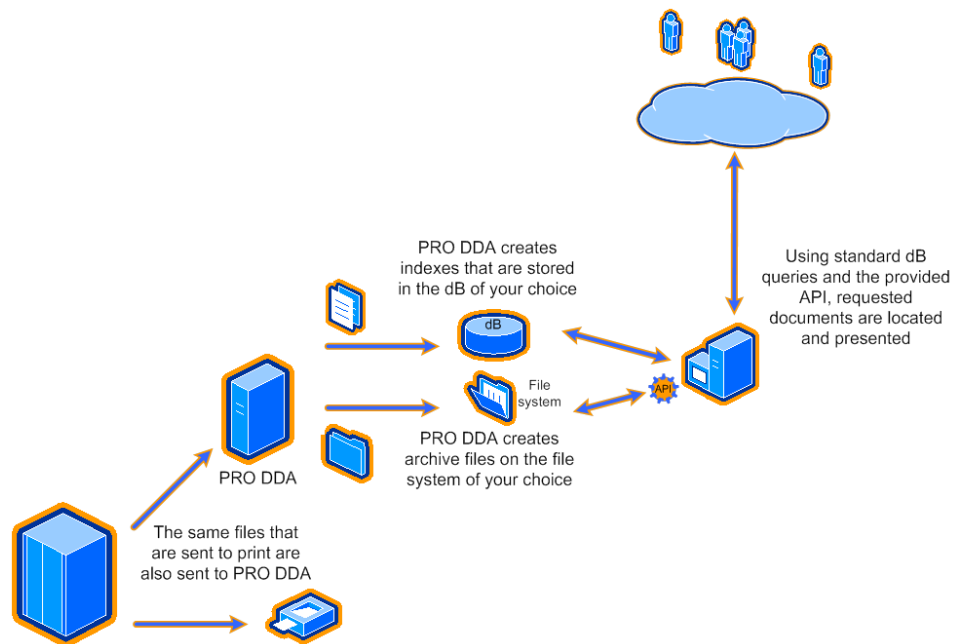
Document Archiving for transactional customer documents.

Document Archiving solutions for ECM systems.

### Workflow:

Full, end-to-end, management of your transactional or print on demand document production workflows.

# PRO Dynamic Document Archive Diagram



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