



DataGateway ViewPoint

Consolidate your document delivery with DataGateway

WML's DataGateway ViewPoint allows users to only have sight of documents they are authorised to see.

DataGateway is WML's document management platform. It integrates with your back-office application and provides all the key features necessary for a complete document delivery solution for print-and-mail, SMS, email, or web portal.

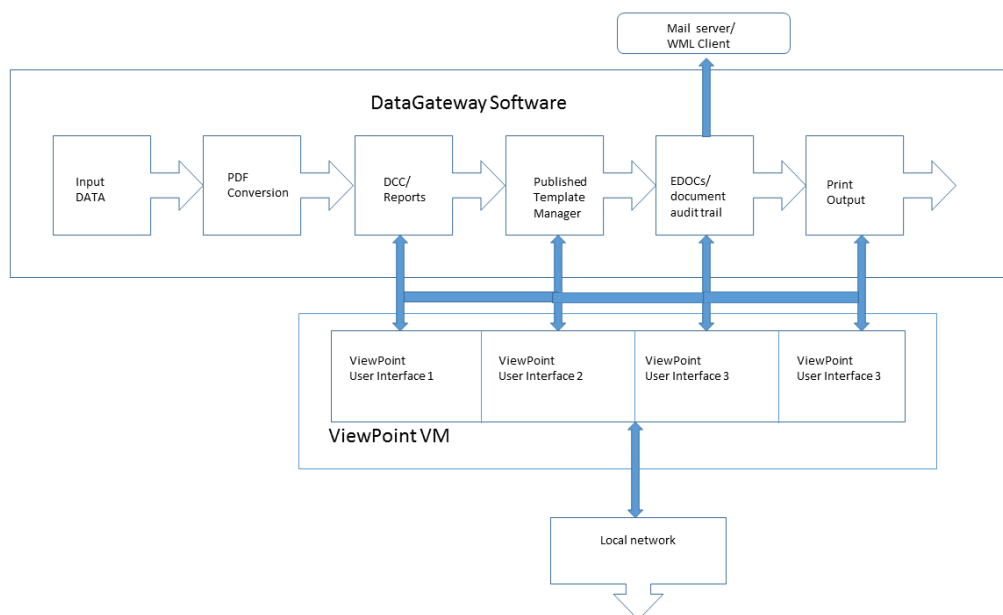
The solution is ideal for insurance and other financial institutions and works well with back-office systems from CDL (Prescribe or CEDS) and SSP. DataGateway solutions can be tailored to provide exactly the functionality your business requires.



WML DataGateway ViewPoint

WML DataGateway ViewPoint is a secure user login interface that integrates into the DataGateway resources and document work flow to allow users to only have sight of documents they are authorised to see. The ViewPoint software resides in its own VMware environment which is totally secure and standalone from the main DataGateway document workflow. The solution is ideal for a broker or departmental environment.

All documents pass through the main DataGateway workflow and are processed as normal, using template manager, Document Content Control, Profile conditioning and finally delivered via email electronic delivery, SMS and Print. The configuration and functionality of DataGateway remain unchanged with the exception that a user tag or reference is added to each document that is to be viewed from ViewPoint. These tags or references can be included either via hidden document tags or can be included within the body text of the document. (See more information on DataGateway at <http://www.wmltd.co.uk/index.php/resources/documentation>)



Benefits of a DataGateway ViewPoint

- **Create User Groups:** These users will only be able to have sight of and perform actions on documents that have relevance to their group.
- **Document Confidentiality:** Make sure only authorised staff members have sight of certain types of data.
- **Call centre service:** Feedback of faulty documents to sales and customer service staff provides a metric to gauge service improvements.
- **Document compliance:** Reduce the risk of incurring regulatory fines or of losing future legal action due to the delivery of faulty documents. Take advantage of version controlled letter and document template publication to control and record exactly which versions of documents are released to customers.
- **Regulatory compliance:** Avoid regulatory fines due to late delivery. Document Audit trails confirm document download by customer.
- **Management information:** Create management reports from any of the information contained in your documents.
- **Electronic delivery:** Reduce delivery costs by transitioning to electronic delivery, whilst retaining the ability to fall back to print and mail.
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Key Features of DataGateway ViewPoint

- **Document quality control** with *WML Document Content Control (DCC)*. Document Content Control can apply a range of *DCC actions* to check and augment your documents. The plugin architecture of the DCC action code allows customised actions to be quickly developed.
- **Document sorting** with *DCC Sort Actions*. Another plugin-style feature of Document Content Control, DCC Sort Actions can post-sort your daily document output prior to printing.
- **Management information.** DCC uses the document's content to identify page and document types. It collects information from the document page content into the *DCC database*. Reports can be generated for held and output documents. Daily spreadsheet reports are available as well as direct, read access to the on-board SQL database for customised reporting.
- **Document outsourcing** - secure encrypted and compressed delivery of documents in real-time to a digital print facility of your choice.

ViewPoint User Administration

If you have an administrator login you can create a new user, specifying username, login password and available menu actions that the account is allowed to access. The administrator also associates this new user account with a group reference. This association restricts the user to only a sub-set of documents within the DataGateway workflow. See User administration screen below:

DCC (Document Content Control) and EDD (Electronic Document Delivery) actions available to a user are as follows:

Document Content Control (DCC), DCC Held Documents, DCC Held Documents Search all queues, DCC Held Documents View, DCC Held Documents Force Release, DCC Held Documents Print, DCC Held Documents Print without Release, DCC Held Documents Delete, Electronic Document Delivery (EDD), EDD Search, EDD View, EDD Display Audit Trail, EDD Print, EDD Cancel Document and EDD Reports.

ViewPoint User Login

When a user logs into the system predefine actions that are available to them by their group settings are displayed in the standard DataGateway interface menu structure. The following user Ted Fisher User reference 353532 has sight of the DCC Held Documents option, all EDD options including search, view, audit trail, print, cancel and reports. The first page on login Ted Fisher would be the DCC held documents page as follows:

Ted Fisher (ref: 353532)
Broker Interface
broker

Content Control
Electronic Delivery
System Settings

Logout

Held Documents

DCC Held Documents

Queue: All

Ref	Document type	Page types	Outcome	Reason for hold	Hold date	Queue	Action	Select
A2447566	NB1	LET, DN, STAT	Hold (A value for 'with effect from' was not found.)	A value for 'with effect from' was not found.	2015-12-17 10:00:21	IN:NewBusiness_In OUT:NewBusiness_Out		<input type="checkbox"/>
A2447566	NB1	LET, DN, STAT	Hold (A value for 'with effect from' was not found.)	A value for 'with effect from' was not found.	2015-12-17 11:44:27	IN:NewBusiness_In OUT:NewBusiness_Out		<input type="checkbox"/>
A2447566	NB1	LET, DN, STAT	Hold (A value for 'with effect from' was not found.)	A value for 'with effect from' was not found.	2015-12-17 11:44:40	IN:NewBusiness_In OUT:NewBusiness_Out		<input type="checkbox"/>
A2242596	REN LET	LET, DN, DDPC, STAT, STAT, STAT	Hold (The address on page 1 does not have the required minimum of 4 lines (including postcode))	The address on page 1 does not have the required minimum of 4 lines (including postcode)	2015-12-17 11:45:51	IN:Renewals_In OUT:Renewals_Out		<input type="checkbox"/>
A2447566	NB1	LET, DN, STAT	Hold (A value for 'with effect from' was not found.)	A value for 'with effect from' was not found.	2015-12-17 13:12:15	IN:NewBusiness_In OUT:NewBusiness_Out		<input type="checkbox"/>
A2447566	NB1	LET, DN, STAT	Hold (A value for 'with effect from' was not found.)	A value for 'with effect from' was not found.	2015-12-17 13:12:19	IN:NewBusiness_In OUT:NewBusiness_Out		<input type="checkbox"/>

Refresh

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Document Delivery Audit Trail.

When a user searches for a particular documents or set of documents using the Electronic Delivery menu page, the documents that have been processed by the DataGateway work flow will be display as follow:

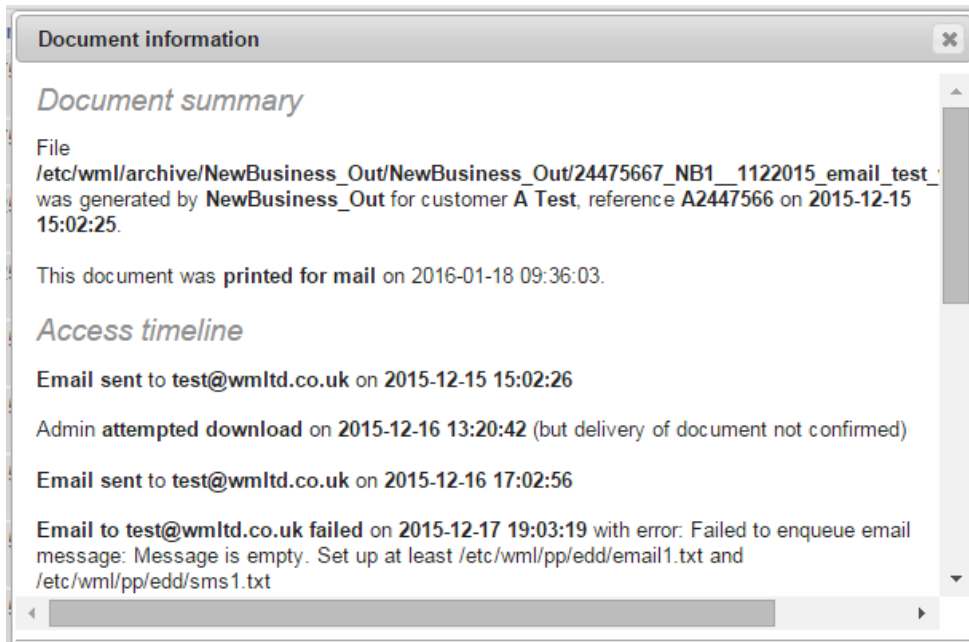
From this page the user can perform a number of tasks, view the delivered documents as a PDF, Edit the email address or SMS telephone number of the recipient, resend the document to the recipient, cancel or delete the sending action. Also clicking the Blue i icon the user can view the complete audit trail and time line of what has happened to that document since its creation.

The screenshot shows the 'Electronic Delivery Database' search results for the term 'a test'. The interface includes a search bar, navigation tabs (Content Control, Electronic Delivery, System Settings), and a 'Broker Interface broker' header. The results table is as follows:

Name	Creation date	Customer ref	Mobile/Email	Access code	Status	Action
A Test	2015-12-15 15:02:25	A2447566	test@vmltd.co.uk	JLFB	Printed for mail at 2016-01-18 09:36:03	[PDF] [Print] [X]
A Test	2015-12-15 15:02:34	A2447566	test@vmltd.co.uk	4PKF	Printed for mail at 2016-01-18 09:47:48	[PDF] [Print] [X]
A Test	2015-12-15 15:11:57	A2242596	test@vmltd.co.uk	Z432	Expired	[PDF] [Print] [X]
A Test	2015-12-15 15:13:11	A2242596	test@vmltd.co.uk	D7TJ	Expired	[PDF] [Print] [X]
A Test	2015-12-15 15:16:04	A582150	test@vmltd.co.uk	T8JU	Expired	[PDF] [Print] [X]
A Test	2015-12-15 15:16:12	A582150	test@vmltd.co.uk	QFV4	Expired	[PDF] [Print] [X]
A Test	2015-12-15 15:16:16	A582150	test@vmltd.co.uk	3QKE	Expired	[PDF] [Print] [X]
A Test	2015-12-15 15:16:19	A582150	test@vmltd.co.uk	CUPZ	Expired	[PDF] [Print] [X]
A Test	2015-12-15 15:16:27	A582150	test@vmltd.co.uk	MPBH	Expired	[PDF] [Print] [X]
A Test	2015-12-15 15:16:29	A582150	test@vmltd.co.uk	YH8V	Expired	[PDF] [Print] [X]

Document Delivery Audit Trail and Time Line.

The DataGateway has the capability to track all document prints and electronic deliveries to a recipient (Print, Email or SMS). The following screen is an example of a document delivery audit trail and time line.



Document Reports

If a particular user group account is setup to allow the production of reports, the ViewPoint software will produce a report depending on the search terms that have been requested in the report generator screen. A standard report could be based on date, time, document recipient name or document reference for example. Custom reports created from data extracted from the document workflow are also available.

Further Information

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