

FSSI

Document Outsourcing Specialists

Business Profile

FSSI is a full-service print, mail and online document presentation outsourcing leader with over 40 years of experience specializing in designing, producing and delivering high-quality, regulatory compliant customer communications.

Industry

Service Bureau & Outsourcing

Locations

Santa Ana, CA, USA
Coppell, TX, USA

Business Solution

- Secure Document Archiving
- Electronic Document Presentment
- Document Assembly
- Data Indexing

Solimar Products

- SOLsearcher™ Enterprise (SSE)
- Solimar® Indexing Tools

Benefits

- Archiving over 1 billion images and running nearly 200 customer applications resulting in 360 million electronic statements
- Utilized security identification tokens to allow specialized access based on the user's login and credentials
- Implemented full encryption for all archives, which provides additional security and helps meet compliance standards and regulations
- The SSE web interface allows client service representatives to provide Tier 1 technical support without having to consult the IT department

“SSE is a cornerstone of our eStreamOne solution for online document presentment. Its core platform is reliable and efficient and offers a wide range of features around security and customization.”

HENRY PEREZ
President

One Billion Served at FSSI: The ePresentment Power of Solimar's SOLsearcher Enterprise

Introduction

For over four decades, FSSI has been at the forefront of high-volume transactional printing and document outsourcing for clients in financial services, insurance, utilities, government, non-profit, and healthcare. If it can be printed and mailed, FSSI can provide those services and more from their facilities in California and Texas. They also offer creative and document design services, electronic presentment, eDelivery with full tracking, regulatory compliance, and tracking capabilities their customers need.

To meet customer demand for increased ePresentment capabilities and services, FSSI developed its eStreamOne platform powered by Solimar's SOLsearcher Enterprise (SSE). With eStreamOne, they can deliver millions of statements electronically from an archive now reaching more than 1 billion images. SSE is a robust and highly secure, multi-tenant electronic document delivery and web presentment suite that enables organizations to efficiently index, store, search, and retrieve large collections of documents. The solution is uniquely designed to confront the challenges of electronic presentment: scalability, speed, security, flexibility, and quality assurance.

Solimar Systems recently spoke with Henry Perez, President, and Brandon Fee, Development Manager, to understand how SSE became integral to the company's ePresentment platform and capabilities.

“Solimar's tech support team is quick to respond and willing to dive deep with us to find a swift resolution. With Solimar as a partner, we can ensure our clients are receiving a high-quality product with impeccable uptime.”

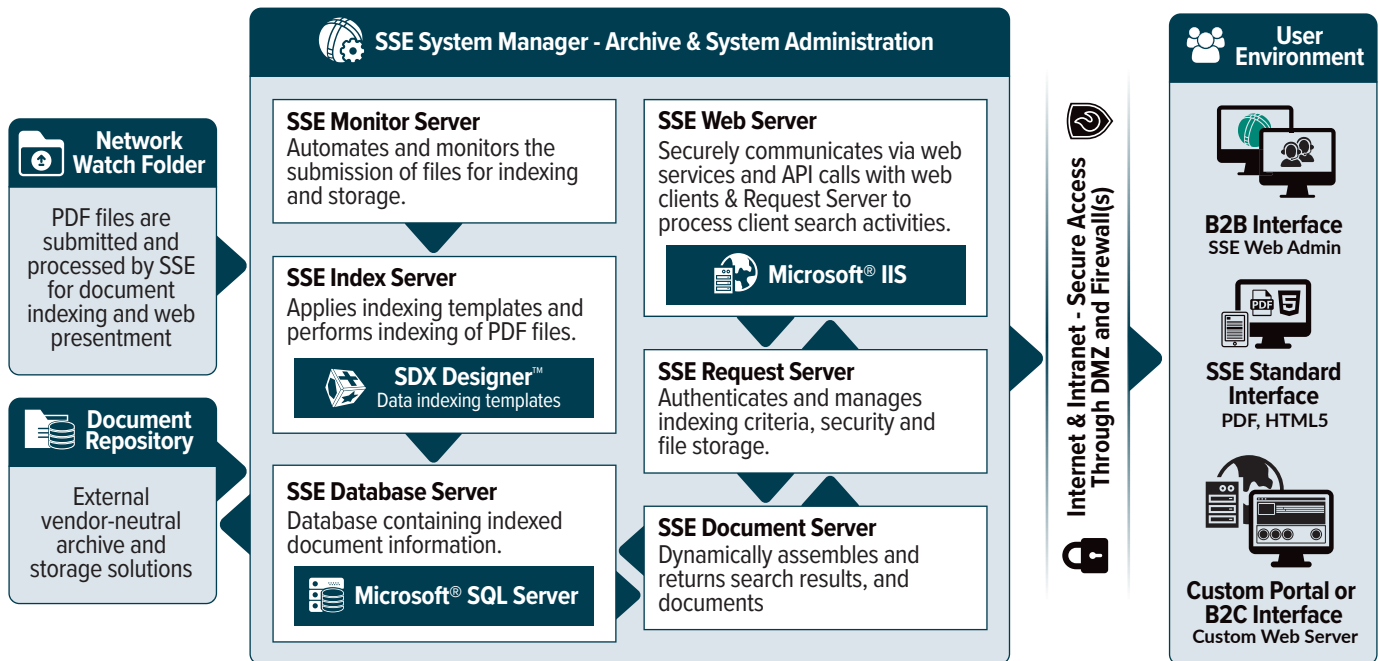
BRANDON FEE, Development Manager

The Path to 1 Billion Images Served

Today's consumers expect an omnichannel approach to their bills and statements. Studies continue to show that a significant percentage of consumers want to receive paper documents and want to access that same information through a mobile app or online through a secure portal. The change in customer behaviors and technological improvements led FSSI to develop those solutions for their customers, resulting in eStreamOne for ePresentation.

Early in their journey, FSSI was using another tool for ePresentation but found it to be cumbersome, expensive, and lacking flexibility in meeting their customer's needs. The search for a better solution quickly led to Solimar's SSE. Today the company hosts archives of over 1 billion images running nearly 200 applications for customers resulting in 360 million electronic statements. The scale and speed SSE provides are critical, considering some clients require files to be available online 20 minutes after they are received. ***"Solimar's SOLsearcher Enterprise software is a cornerstone of our eStreamOne solution for online document presentation. SSE's core platform is reliable and efficient and offers a wide range of features around security and customization,"*** states Henry Perez.

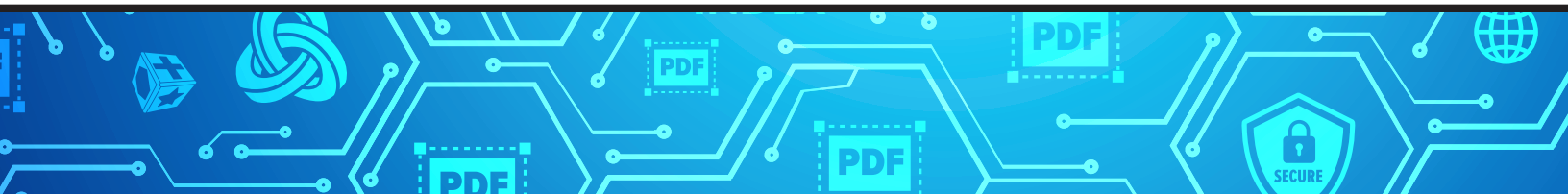
SOLSEARCHER ENTERPRISE ARCHITECTURE & COMPONENTS



Security is not Optional

Transactional communications contain Personally Identifiable Information (PII) and must be secured regardless of the output method. FSSI provides full encryption for all archives, which provides one level of additional security and helps meet compliance standards and regulations. However, the architecture and functionality of SSE provide additional layers of security. First, SSE separates distinct tasks, like client authentication and security information, across dedicated servers. It supports splitting different modules across servers for monitoring files, indexing, document assembly/retrieval, and other requests, which improves scalability, redundancy, and security.

Another more sophisticated security feature of SSE used at FSSI is identification tokens. When configured, these tokens allow for specialized access based on the user's login and credentials. One use would be where a single archive exists where different users need full and limited access. For this, FSSI created an archive containing files with and without PII. A user account was created for Customer Service Representatives using an identification token for access to the documents with PII, while another user account was created for customers using an identification token for access to documents with redacted PII. User access profiles or API calls determine which version is accessed.



Have it Your Way ePresentment

FSSI has built a flexible ePresentment platform powered by SSE. “Whether it’s ePresentment, solution-driven portals, integration initiatives, and/or print and mail, FSSI’s continuous progression of our digital offerings allow our partners to manage their communication needs with one trusted organization,” said Henry Perez. FSSI allows clients to integrate ePresentment in the way that works best with their organization and existing technology infrastructure to provide a seamless user experience.

Single Sign-On (SSO)

Clients can access documents online using a single sign-on (SSO) approach to a customized web portal hosted by FSSI. From there, users can visually navigate the portal to retrieve their specific documents to view online.

Application Programming Interfaces (API)

Clients can call a REST API for specific repositories of document images via a designated user account. Based on the specific calls sent, index values and documents can be retrieved for use in the client’s existing business systems and software stack.

Fully Hosted

FSSI can also provide a fully hosted and secured site for ePresentment. FSSI has also built microsites where retention or offer letters are sent to customers and archived with different retention periods. The customer support representatives can then retrieve and confirm the original offer sent when a customer calls to accept.

Quality Assurance Throughout

The stakes are high when dealing with customers’ personal information, from account numbers to financial figures. The data must be accurate and securely accessible to those with permission. To ensure the highest accuracy of data being presented, FSSI created a custom quality assurance program using SOLsearcher. FSSI’s eStreamOne platform creates an aggregate PDF file, indexes accessible data fields, then performs a comparison of the data substream versus the content within the PDF. If the data matches the PDF content, the files continue to the archived repository. In cases where there is a mismatch, the data and files are flagged for further review and correction.

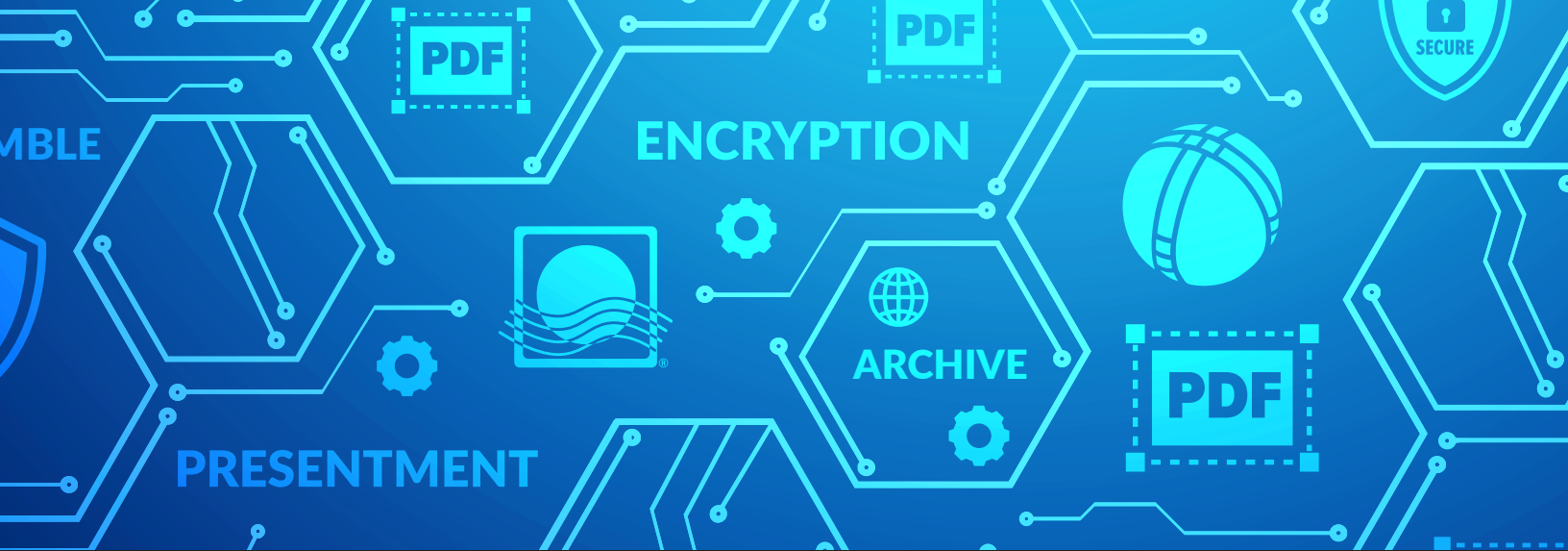
The technical solution is essential but only part of a successful solution. Perez and Fee agreed that the Solimar toolset, along with their technical support, makes it all work. Fee noted, *“Another thing that has been huge is having access to the SSE web interface where FSSI’s client service representatives can provide Tier 1 technical support without having to go to IT.”* The result is empowered employees who can quickly respond to the needs of clients in industries where seconds and minutes are critical.

With SSE, FSSI has created a powerful ePresentment platform that is scalable, fast, secure, flexible, and accurate. FSSI can extend a valuable service and make it a simple process for their clients that will propel them to the next billion in archived and digitized documents. “When we have questions or issues, Solimar’s tech support team is quick to respond and willing to dive deep with us to find a swift resolution,” states Fee. *“With Solimar as a partner, we can ensure our clients are receiving a high-quality product with impeccable uptime.”*

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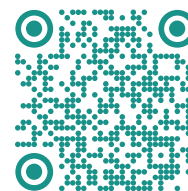
BRANDON FEE
Development Manager





Additional Solimar Success Stories

For more examples of how Solimar helps organizations lower IT costs, modernize print capabilities, maximize technology investments, and gain control of their printing environment, please scan the QR code or visit www.solimarsystems.com/case-studies/.



Join Solimar's Cloud-Based Learning Platform

The Solimar University Online (SUO) learning platform provides clients and partners with targeted access to educational content for personal and professional development at times that fit their schedules. This platform provides unique and relevant content to clients and partners based on a user's profile and preferences. SUO enables online users to access robust learning content such as industry videos, presentations, reference documents, updated SolimarShorts, audio podcasts, and assessment materials. The self-paced SUO learning platform includes industry education, Solimar product and solution training modules and more. Register today at suo.solimarsystems.com/suo-registration/.



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