

Publisure least cost workflows



Digital First

**An open Non-proprietary middleware
platform for Digital Transformation**

Publisure Service Definition

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Introduction

Publisure is a market-leading, non-proprietary multi-channel communications platform, enabling least-cost delivery across hybrid mail, email, secure email, SMS, app, and web portal channels.

While Hybrid Mail has historically delivered cost savings through postal discounts and process efficiency, sustained increases in postal costs have significantly reduced its long-term value. As a result, Hybrid Mail should be viewed as a transitional capability rather than a complete solution, and as a stepping stone toward broader digital transformation.

In practice, many organisations have successfully outsourced structured, batch-based communications via Hybrid Mail but continue to struggle with fragmented, unstructured documents produced at the desktop. This limits overall efficiency gains and prevents the realisation of the larger cost and operational benefits originally anticipated.

Moreover, reliance on proprietary Hybrid Mail solutions often restricts digital flexibility, increases costs, and reduces customer control—locking organisations into supplier-specific digital channels or forcing them to pay additional fees to reclaim or redirect documents.

Executive Summary

Publisure provides a fully integrated, flexible communications platform that combines physical and digital delivery into a single, seamless workflow. Its modular design enables organisations to tailor solutions to their operational, cost, and compliance requirements while maximising existing digital investments.

Key Modular Capabilities:

POD Print Driver & Business Rules: An intuitive print driver and graphical business rules wizard enable automatic identification, indexing, collation, and submission of large batch documents, reducing manual effort and ensuring accurate high-volume processing.

Consolidation & Least Cost Delivery: Publisure can collate multiple documents per recipient, optimise postal costs, and integrate multiple delivery channels (portal, app, SMS, email, hybrid mail) into a single least-cost workflow, maintaining visibility, control, and auditability.

Publisure Lite: A secure, lightweight digital delivery module that uses file sharing, one-time access codes, and integrated email/SMS notifications to provide a closed-loop workflow. Unread documents can trigger automated reminders or hybrid mail delivery, ensuring secure, cost-effective communications.

SMS & Email Modules: Fully integrated one-way and two-way SMS and email capabilities enable recipients to receive and respond to messages via mobile or email. Both modules provide full tracking, closed-loop workflows, and a complete audit trail for compliance and visibility.

Forms Design (VDP) Module: Automates creation of sophisticated templates merged with structured data (CSV, XML, ASCII) to generate print-ready or PDF outputs, enabling seamless integration into wider communications strategies.

Web Portal Module: A secure, customisable portal supports digital delivery with full onboarding workflows, registration, authentication, read tracking, automated reminders, and fallback hybrid mail for unread documents.

Inbound Scanning Module: Provides end-to-end document capture, integrating inbound workflows with outbound communications for a fully unified platform.

Mailmark & Mailsort Integration: Optimises postal output presentation using Royal Mail standards, reducing costs and ensuring compliance.

Gov.UK Notify Integration & Third-Party Hybrid Mail Interface: Enables seamless connection with third-party digital delivery and hybrid mail solutions, preserving flexibility and maximising existing technology investments.

Archiving Module: Provides a fully indexed digital archive for document retention of up to seven years, supporting compliance and audit requirements.

Strategic Benefits:

- Streamlines and automates workflows across physical and digital channels
- Reduces operational costs while optimising delivery efficiency
- Enhances auditability, compliance, and reporting
- Future-proofs communications through digital-first, modular architecture
- Enables recipients to choose their preferred delivery channels, improving engagement

Publisure's modular, open, and non-proprietary framework empowers organisations to implement tailored, cost-efficient, and secure communications strategies while supporting broader digital transformation initiatives.

Integrating existing Document Templates

Where documents are produced as PDFs or generated from existing templates within line-of-business systems, implementation requires little or no change to current document outputs.

Documents are ingested into Publisure through simple, standard mechanisms- via the Publisure print driver, submitting PDFs to a designated hot folder or through the Publisure API interfaces.

Each document type is automatically identified using lightweight business rules, enabling Publisure to classify, enrich, and apply the appropriate delivery logic in line with agreed requirements.

This approach ensures seamless integration, minimal disruption, and consistent, controlled fulfilment across all delivery channels.

Handling complex document requirements

For document types requiring more advanced business logic, Publisure's core strength is its flexibility, supported by intuitive user interfaces that adapt to complex requirements.

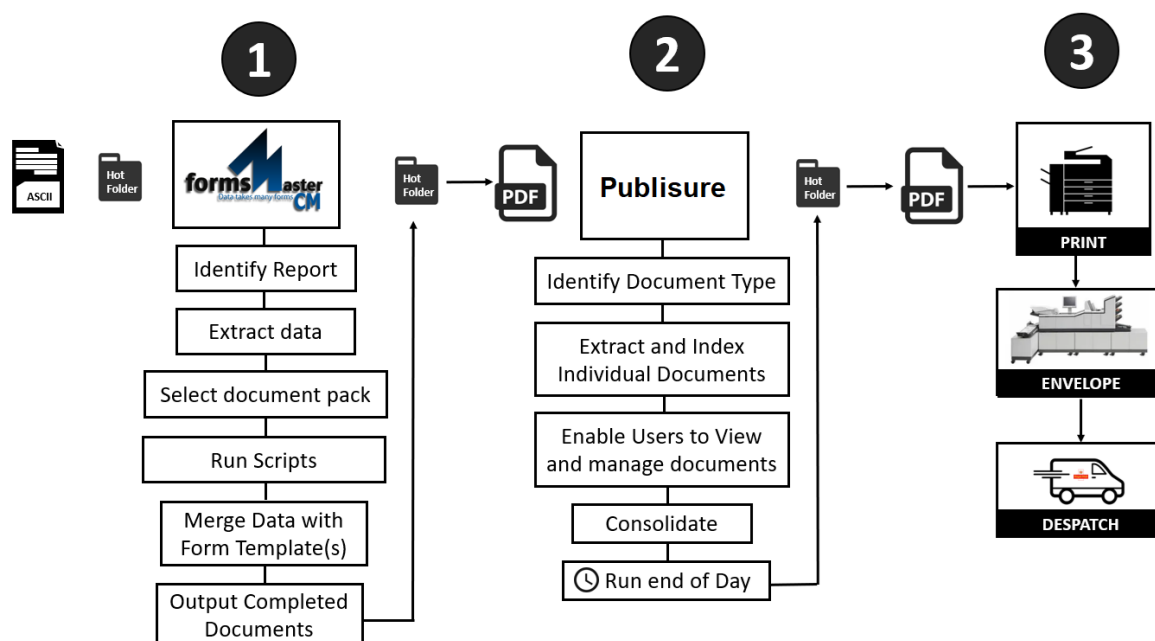
Multiple integration options enable tailored processing rules to be applied based on document type, output complexity, and delivery needs.

Where enhanced collation or bespoke content is required, the Publisure desktop print driver provides users with controlled flexibility—allowing attachments to be added, document packs to be previewed, and outputs validated prior to submission.

Variable Data Printing

Publisure also offers an additional option through its own VDP solution, enabling organisations to generate documents directly from structured data exports (e.g. ASCII, CSV, XML).

Using an intuitive WYSIWYG design tool, data is seamlessly merged into pre-defined templates, providing controlled, scalable production of personalised communications with minimal dependency on source applications.



Open, non-proprietary framework

Publisure's open, non-proprietary hybrid mail architecture enables straightforward integration with existing platforms, protecting prior investments. Where capability gaps exist, optional modules (such as secure digital portals) can be introduced to deliver the required outcomes and maximise value.

Auditability and Compliance – Ad-Hoc and transactional documents

Publisure provides end-to-end visibility and control across the entire document lifecycle, enabling every mail item to be uniquely identified, tracked, and audited from creation through to fulfilment and despatch.

The platform captures comprehensive system logs, recording document submission, approval, and release activity, ensuring full administrative oversight and accountability.

Each document is assigned a unique identifier at the point of submission, with associated customer and metadata captured, indexed, and made searchable within the Publisure Post Box. Users can easily locate documents using recipient details, customer references, or other key attributes.

Document status is continuously updated as items progress through input, production, enveloping, and despatch, providing real-time traceability and timestamped audit records. A daily closed-loop feedback report and job completion confirmation further validate successful processing.

Where required, Royal Mail Mailmark barcodes extend tracking beyond production, enabling visibility through postal sortation to the final delivery stage—delivering a fully auditable, compliant, and transparent mail fulfilment process.

Publisure Topologies

Publisure is available as both an on-premise (inside-the-firewall) deployment and a cloud-based SaaS solution, allowing customers to choose the model that best aligns with their security, compliance, and operational preferences.

Cloud based SaaS Topology.

In the cloud-based SaaS model, only the Publisure client software resides within the customer's firewall, while the Publisure server is securely hosted in Microsoft Azure, providing 99.5% availability.

All communication between client and server is protected using advanced SSL and encryption technologies, ensuring secure, reliable access to the platform.

An Open non-proprietary framework for digital transformation

A completely open framework for digital transformation - A key strength of the Publisure platform is its ability to provide not only its own digital delivery options but also integrate with third party applications. This ensures the customer is able to maximise their existing investment in digital delivery without duplicating technologies.

Rather than 're-invent' the wheel, our objective is to 'bridge the gap'.

We will take inputs from across the organisation, optimise them and deliver them through whatever the customer determines to be their preferred delivery channel(s). Underlying this strategy, there are four objectives in driving innovation digital transformation: -

1. Delivering operational efficiencies across the organisation
2. Reducing the cost of delivering each communication
3. Increasing auditability and compliance
4. Enabling the customer to determine how they wish to receive their communication

We have created a simple three-step process to apply across all implementations

Step 1 – Optimise the current print and post streams, maximise deployment across the organisation.

Step 2 - Improve internal workflows and maximise operational efficiencies via the use of our hybrid mail platform.

Step 3 – Implement an integrated digital communication strategy leveraging the customers' existing investment in digital technologies.

The Publisure system (although modular) provides a single consistent and intuitive workflow incorporating physical (i.e. hybrid mail) and digital delivery options.

A Fully Open Framework for Digital Transformation

A key strength of the Publisure platform is its ability to deliver both its own digital channels and integrate seamlessly with third-party applications. This ensures customers can maximise existing digital investments without duplicating technologies - our approach is to "bridge the gap" rather than "re-invent the wheel."

Publisure consolidates inputs from across the organisation and delivers them through the customer's preferred channels, guided by four strategic objectives:

1. Drive operational efficiency across the organisation
2. Reduce the cost of communication delivery
3. Enhance auditability and compliance
4. Empower recipients to choose how they receive communications

Our proven three-step implementation process is designed to optimise impact:

- **Step 1:** Optimise existing print and post streams across the organisation
- **Step 2:** Enhance internal workflows and operational efficiency through hybrid mail
- **Step 3:** Implement an integrated digital communication strategy leveraging existing digital technologies

Publisure provides a single, consistent workflow unifying physical (hybrid mail) and digital delivery. It is future-proofed to onboard recipients for secure digital delivery via two-step

registration, providing an intuitive web portal or app with interactive email and SMS communications.

Additional Publisure Modules

In addition to the core platform, Publisure offers modular functionality to customise and extend the solution to meet specific organisational needs:

Gov.UK Notify Integration – Leverages the Gov.UK Notify API to seamlessly deliver email, SMS, and hybrid mail, providing a transparent, integrated interface to these channels.

NHS Notify Integration – Leverages the NHS Notify API to seamlessly deliver email, SMS, and hybrid mail, providing a transparent, integrated interface to these channels.

Archiving Module – Provides a fully indexed digital archive, allowing retention of documents for up to seven years, beyond the standard processing and despatch period.

Third-Party Hybrid Mail Interface – A fully open, non-proprietary interface enabling integration with other hybrid mail providers, allowing organisations to manage existing print and post volumes alongside third-party suppliers.

SMS Module – Publisure offers a fully integrated one-way and two-way SMS module, enabling recipients to receive communications directly on their mobile devices. Messages can be generated automatically via pre-configured workflows or sent manually through the intuitive Publisure interface.

Two-way SMS capabilities allow recipients to respond, with replies routed back to the originator and linked to the primary communication, creating a closed-loop, fully traceable workflow. Each SMS is captured with a complete audit trail, ensuring compliance, visibility, and accountability for all mobile communications.

Publisure Email Module – Publisure provides a fully integrated email module that securely connects with your preferred email platform via standard APIs and interfaces. Documents can be sent as attachments or password-protected for added security.

The module not only submits email communications but also tracks delivery status, enabling users to monitor and manage issues such as bounce-backs, invalid addresses, or non-delivery. This ensures reliable, auditable, and secure email communications within a fully integrated workflow.

Publisure Business Rules Module – In addition to the intuitive POD print driver, Publisure provides an integrated business rules capability. Using a graphical wizard, customers can define rules to automatically identify, index, collate, and submit large batches of templated documents. This approach simplifies processing, reduces manual intervention, and ensures consistent, accurate handling of high-volume document workflows.

Publisure Consolidation Module – The Consolidation Module automatically identifies and collates multiple documents for the same recipient prior to despatch. This streamlines communication, simplifies recipient experience, and optimises postal costs by reducing the number of individual mailings.

Publisure Variable Data Printing Module – Publisure provides a fully featured, automated forms design solution that enables organisations to create sophisticated document and form templates. These templates can merge directly with CSV, XML, or ASCII data extracts to

generate print-ready or PDF outputs, which can then be seamlessly integrated into broader communications workflows..

Publisure MailMark/Mailsort Interface – Publisure offers an integrated Mailmark and Mailsort interface to optimise the preparation and presentation of postal outputs. By leveraging Royal Mail's address management capabilities, this module enhances delivery efficiency, reduces postal costs, and ensures compliance with postal standards.

Publisure Web Portal Module – Publisure provides a fully integrated, customisable web portal to support secure digital delivery of documents. The portal includes complete onboarding workflows with registration and authentication, enabling recipients to view documents online.

Auditability and compliance are built in, with read receipts automatically captured. For unread documents, automated reminders can be issued via email or SMS, and if still unaccessed, the system can trigger hybrid mail delivery—ensuring a secure, fully controlled, and least-cost communications workflow.

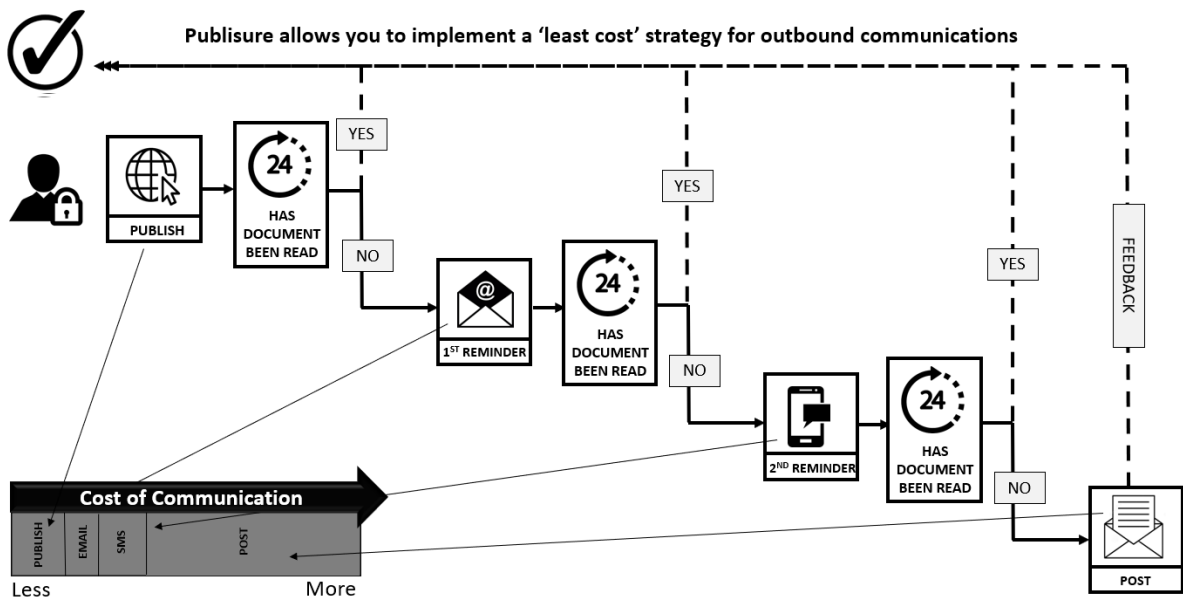
Publisure Communications Manager – Publisure offers a fully integrated inbound scanning solution that, when combined with its outbound capabilities, creates a single, seamless platform for managing end-to-end communications. This unified approach enables organisations to efficiently capture, process, and route incoming documents while maintaining full traceability and integration with outbound delivery workflows.

Publisure Lite - Publisure Lite is a secure, “light-touch” digital delivery platform that integrates with existing email and SMS systems to provide simple registration and authentication workflows for onboarding clients. Multiple references can be used to identify recipients across departments, enabling tailored delivery and the implementation of a ‘golden record’..

Instead of automatically despatching letters via hybrid mail, Publisure Lite checks whether recipients are enrolled for digital delivery. If subscribed, recipients receive an email or SMS notification with a secure link to view their document, with optional one-time access codes to verify identity.

Publisure Lite provides a closed-loop workflow, tracking whether documents have been accessed. Automated reminders are issued for unread documents, and if still unviewed, the system can trigger hybrid mail delivery—ensuring a secure, integrated, and least-cost approach to customer communications

Publisure Least Cost Delivery Module – The Least Cost Delivery Module enables customers to integrate multiple communication channels—such as portal, app, SMS, email, and hybrid mail—into a single, optimised workflow. Using a simple GUI wizard, organisations can ensure each document is delivered via the most cost-effective channel while maintaining full control, visibility, and auditability.



This allows customers to implement a digital first strategy within a broader framework ensuring read receipts are generated by the on-line applications, reminders to view a document sent out (if required) and ultimately reverting to physical channels of communication such as hybrid mail if the letter has still not been read.

On Boarding Processes

Publisure does not follow a generic “lift-and-shift” approach. While initial implementation focuses on delivering efficiencies and postal cost savings through hybrid mail, this is viewed as a stepping stone toward a fully integrated, multi-channel digital transformation strategy.

We collaborate closely with customers to define their ideal communications framework, recognising that existing digital investments are often application-specific, resulting in duplicated technologies, effort, and costs. Rather than “re-invent the wheel,” Publisure bridges the gap—optimising inputs across the organisation and delivering them via the customer’s preferred delivery channels.

Our approach is guided by four key objectives:

- Drive operational efficiencies across the organisation
- Reduce the cost of delivering each communication
- Enhance auditability and compliance
- Empower recipients to choose their preferred delivery channel

Hybrid mail is implemented within a non-proprietary solution. While Publisure provides a full suite of secure digital tools, the digital framework is tailored to the customer’s requirements, ensuring optimal value, flexibility, and alignment with broader organisational objectives.

Ease of deployment

The Publisure platform provides a suite of flexible, intuitive technologies for automating the secure print, fulfilment, and despatch of documents. Key capabilities include:

1. **Desktop Print Driver** – A simple, downloadable driver for letter creation and mail merge, easily deployed by IT via an MSI package with minimal disruption to users.
2. **Rules-Based Configurations** – Automates the processing of template-based correspondence generated by back-office departmental applications.
3. **Document Creation Toolkit** – Generates print-ready documents from structured data files, supporting complex or bespoke outputs.

These tools are designed for rapid deployment, enabling organisations to implement secure, efficient hybrid mail workflows quickly and with minimal operational impact.

Ease of use

Publisure provides a simple, intuitive interface that gives users full control over the creation and management of their documents. Documents and inserts can be submitted via the print driver or a hot folder, while the print driver enables configuration of a “job ticket” to manage print options, attributes, and additional information packs.

Users can easily specify document-level preferences—such as colour or mono printing, simplex or duplex, letterheads, inserts, and postage class—either at submission or automatically through business rules, ensuring accurate, flexible, and consistent document fulfilment

User Training

Publisure provides a suite of downloadable, intuitive desktop clients, each offering users secure, personalised post boxes to manage and control their documents. During mobilisation, a detailed training plan is developed with the Council to ensure smooth adoption prior to go-live.

The Publisure training platform is primarily self-serve, with downloadable online videos and instructional PDF guides allowing users to learn at their own pace. Where required, formal training is available, either as “train the trainer” sessions or small group workshops (up to 8 users), typically lasting 2½ hours and covering presentations, demonstrations, hands-on practice, and Q&A.

Administrator training is provided as a one-day course, focusing on system setup, configuration, and the creation and deployment of business rules using Publisure’s intuitive administration wizards. All training costs are included in the pricing schedule, supporting a seamless, low-impact implementation.

Support and Maintenance – Schedule of services and responsibilities.

Software Maintenance (including installation, testing, network connection, preventative and breakdown maintenance)

Publisure follows a structured release schedule, with major version updates typically issued every 12–18 months and interim releases every 6–9 months. The platform supports both the current and previous software releases.

As part of the proposal, Publisure includes full installation, testing, and support for customer User Acceptance Testing (UAT), ensuring a smooth transition to new releases while maintaining operational continuity.

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Out of Hours Cover

All maintenance and software upgrades can be scheduled outside of normal business hours to minimise operational disruption. Out-of-hours maintenance is available on request, though additional charges may apply for this service.

E-Maintenance options

Automated alerts can be configured via email.

Logging Support Tickets

Publisure provides a secure, cloud-based web portal for logging and managing support tickets. Each customer receives a personalised login, allowing tickets to be raised, tracked, and managed online through our Jira-based system.

A fully staffed Help Desk operates Monday to Friday, 9:00 am to 5:30 pm (excluding bank holidays), providing responsive, professional support to ensure smooth system operation and rapid resolution of issues.

Remote Access

To provide Annual Support and Maintenance, Publisure requires the customer to supply authenticated, secure remote access for authorised support personnel. This ensures that Publisure can efficiently troubleshoot, maintain, and update the system while maintaining strict security and compliance standards.

Information Governance – SLM Support Staff

All Publisure Service Level Management (SLM) support staff are trained in, and commit to adhering to, the processes, objectives, and requirements outlined in our Information Security Management System (ISMS) policy. This ensures that all support activities maintain the highest standards of security, confidentiality, and compliance.

Information Governance - Secure transfer of data

When sharing sensitive data, Publisure provides a secure SFTP account for the customer, with individual login credentials. All data is transferred over SSL connections and encrypted using AES 256-bit technology, ensuring complete confidentiality and security during transmission.

Break Fix Support

The Publisure Help Desk confirms, clarifies, and manages all tickets submitted by customers. Each ticket is assigned a unique incident number, with severity levels agreed upon with the customer. Initial responses are provided in accordance with agreed service standards, ensuring timely and structured incident management.

Level of severity

Description

Severity 1 - Severity 1 and 2 incidents are defined as faults that significantly impact the customer's business operations, such as issues that could result in substantial financial loss.

Publisure's response is prioritised according to the severity and business impact of the fault. Resolution objectives include:

- Fixing the problem
- Developing a temporary workaround
- Confirming a planned resolution date and resource allocation if beyond target timeframes
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For high-severity incidents, if the resolution exceeds the planned timeframe, Publisure will commit additional resources to achieve resolution as quickly as possible, ensuring minimal disruption to the customer's operations.

Severity 1 - Acknowledgement time 30 mins, Resolution Aim, 1 day, update twice daily or as agreed to per incident.

Severity 2 - is usually if a server, network, application, database goes down which is causing a business impact to users and the business.

Severity 2 - Acknowledgement time 60 mins, Resolution Aim, 2 days, update twice daily or as agreed to per incident.

Severity 3 - Where a bug is raised as part of the support process, SLM support will liaise with the SLM development team and provide a synopsis of the problem within 2 working days and a proposed timescale for its resolution, within a reasonable time frame.

Severity 3 - Acknowledgement time 4 hours, Resolution Aim, 5 days, Update daily.

Severity 4 - Where issues are caused by non SLM software or environments, some advice will be given and support offered, but with no guarantee of resolution.

Severity 4 - Acknowledgement time 4 hours, Resolution Aim, No SLA, Update No SLA

Advisory Services (Patches)

As part of the standard Support and Maintenance agreement, Publisure provides guidance on the implementation of pre-built patches that the customer is licensed to deploy. This ensures updates are applied correctly, efficiently, and in line with best practices, minimising risk and maintaining system integrity.

Development Testing and Implementation of Bug Fixes

If an issue cannot be resolved through alternative configurations or methods, Publisure will replicate the problem internally to fully understand its cause. A bug fix is then developed and provided to the customer, along with guidance on its implementation, ensuring a controlled and effective resolution.

Development Testing and Implementation of Work Arounds

This service is an integral part of the standard support and maintenance agreement.

Software Monitoring

It is recommended that pro-active and automated Email reporting is implemented.

Knowledge Base

Each new release contains a detailed document of known issues and solutions.

Release Notes

Full Release notes are made available for each incremental and full release of the software.

Upgrading/Replacing Software

As part of the standard Publisure Support and Maintenance agreement, assistance is available for upgrading/replacing or changing (configuring) the software.

User Guides and FAQ's

Full system Guides are available – these include a User Guide, Administration Guide and Business Rules Guide (ARC business rules)

A full Administration Guide is provided detailing everything that is required in terms of configuration and setup of the software.

A standard FAQ's guide is provided as part of the standard documentation.

All documentation is provided free of charge in digital format (PDF). Updated documents are provided (if required) with each full and interim release of the Publisure software.

Single Point of Contact

Typically, we would expect an internal help desk to be the first point of contact for all users. The internal helpdesk would then triage the call and contact the Publisure help desk if required.

Deployment models

Publisure can be deployed either internally on a virtual machine environment or within a private locally hosted cloud, by default Publisure would be hosted on a dedicated server platform (for larger customers) within the Azure environment.