



Whitepaper: Automating with barcode routing and digital document splitting for Financial Brokerage Company



Integration Technology	.Net Bar-codes Windows
Industry	Banking/Finance
Enterprise Applications	RightFax Websphere
Document Flow	Flow Inbound Scan Fax
SNAPS Products	Snapsflow

Executive Summary

SNAPS proposed a solution integrated with the client's workflow environment that helped to eliminate lost documents and enable faster processing of paper based documents received through the client's mailroom. Documents that are scanned in the mailroom today are separated by barcode header pages which allow the Snapsflow application to pick up the document, create a workflow ticket within client's workflow system, correctly orientate the image and present the image via the SNAPS TifEd viewer to the client's indexer for completion of any required indexing data.

Snapsflow will then submit the ticket to their workflow environment for processing. Snapsflow will also route electronic faxed documents via RightFax created within the workflow environment, for example request confirmations. Business rules may be created or modified within Snapsflow to adapt to changing processes and has the ability to scale to different electronic image inputs.

This Snapsflow productivity solution is for managing scanned documents separated by bar code cover sheets initially and is easily expanded to cover other electronic documents that are faxed in on the present RightFax server, or that exist in a folder on the network.

Case Study Details

Client was manually processing snail mail, faxes and scanned documents into backend workflow systems. Client was spending a tremendous amount of manual labor to repeatedly index documents and create tickets in the workflow system. Client was expecting approximately 500,000 documents per year which equated to almost 2,100 documents per day. This volume was scheduled to increase over the next 6 months after implementation.

Scope of Project:

- Install Snapsflow 2.7.5 on the Client supplied server using either a local or remote SQL Server (standard edition).
- Configure the system to monitor one or more network subdirectories and pick up multi-page TIFF files generated by scanning.
- Configure the system to monitor one or more RightFax user mailboxes and pick up fax images for processing.
- Split the scanned/faxed images.
- Perform auto-rotation on the image if required.
- Extract barcode data if available.
- Save TIFF files into a working directory using an agreed upon file naming convention.
- Create a workflow process by posting XML data to URL/Web service.
- Include exception handling and notification in the event that errors occur.
- Fax enables application for outbound faxing via HTTP/XML interface.

TifEd Deployment

ASP.NET web page that will host the TifEd user control. This web page will be opened via a URL link from within the Workflow system. Secure access to this web page will be controlled by Microsoft Internet Information Server (IIS) and client will be responsible for configuring the IIS server to integrate with their authentication software.

Once a user has clicked the link, from within workflow, and the user authentication has taken place, a web page will open in Microsoft Internet Explorer. The link URL will contain a unique identifier for the image file to open. This page will allow the user to view and annotate the TIFF file.

Currently TifEd supports the following features:

- Fit image to width
- Fit image to height
- Zoom In/Out
- Rotate page left/right
- Re-order page
- Pan
- Zoom to rectangle
- Currently TifEd supports the following annotation features:
 - Hollow rectangle
 - Filled rectangle
 - Translucent rectangle (highlighting)
 - Text notes with configurable fonts, bold, underline and italics
 - Merged images
 - SNAPS products:
 - Rightfax Connector
 - Barcode Module
 - XML module
 - Rightfax Listener
 - Snapsflow Core
 - TIFF processor

Based on our records, we were able to complete the install in approximately 2 business days. Client was up and running in production shortly after completion.

Business Need

Client has need for an intelligent routing automation and imaging solution for sorting scanned documents, presenting the digital images, and importing the indexed data along with the image into the their workflow environment. Client had a need to for editing TIFF files, viewing the scanned documents, creating an index and ticket in their workflow.

The client's Call centers receive thousands of documents via mail, fax and email daily. These documents are a mixture of solicited and unsolicited forms sent in by their existing customers, new prospects or generated by the Field Sales Representatives (FSR). One of the client's primary objectives is to process and track all of these documents within the Service Level Agreement (SLA) of 24-48 hours from receipt. The current process takes many hours for the customer service group to acknowledge receipt of a document. This process involves many manual tasks before a traceable process within the client's Workflow system is started. This action leads to many additional phone calls from customers and a tremendous amount of labor to confirm that a document has been processed which can lead to lost revenue and customers.

Benefit/ROI

- The client was able to reallocate labor to other higher valued tasks.
- They were able to process more documents faster and with little manual intervention and without adding additional personnel.
- They reduced the propensity for lost documents within their workflow.
- They started meeting they're 24-48 hour SLA requirements.
- They could accurately Track the life cycle of the document prior to being input into their workflow system.