

### IMAGE-IN CONNECT

- View signed contracts and documents directly in your LOB application
- Store all mission critical documents and their relevant data in one location
- Reduce time spent looking for documents and increase productivity



Working with Omttool's enterprise-class document process automation platform AccuRoute®, Omttool delivers the **Image-In Connect** workflow component. **Image-In Connect** helps businesses reduce lengthy document workflows by seamlessly integrating critical documents and data with your line-of-business (LOB) applications where and when they are needed. This provides a much faster and efficient process for working with and managing critical documents.

### Overview

**Image-In Connect** is a core component of the AccuRoute document process automation platform that expands AccuRoute's capabilities to seamlessly integrate virtually any line-of-business application with its related paper and electronic documents. Through **Image-In Connect**, users have the capability to retrieve data from a business application (meta-data), and capture electronic document images to be processed and managed, all on the AccuRoute platform.

Traditionally, users stored and accessed these documents separately from other related business applications and transactions, creating inefficient parallel processes and prolonged workflows. Now, with **Image-In Connect**, users can easily capture and link documents, including both paper and electronic documents, and conveniently access previously captured documents all without ever leaving their business application. **Image-In Connect** eliminates the need for duplicate data entry, or changes to the native business application.

With **Image-In Connect** you can expand your line-of-business (LOB) applications with document capture for:

- Customer relationship management
- Salesforce enablement applications
- Customized applications
- Property management systems
- Financial systems
- Customer service applications
- Document management systems



### Document Process Automation

As business applications have become more heavily integrated and document-related processes streamlined, there has been a growing need to be able to access documents from within a line-of-business application. Some common examples for line-of-business document retrieval include:

- Payment processing clerks working in their financial application need to view an electronic image of the invoice they are processing while saving the customer account number to that image for future reference
- Sales personnel working within their customer relationship management (CRM) system need to view signed contracts related to a given prospect account, but the original signed hard-copies are kept at corporate headquarters
- A property management company is developing a new property and wishes to store all photographs, specifications, contractor bids and leasing information in one location and have it retrievable from their property management system by the property identification number

**Image-In Connect** has the aptitude to handle all the examples above and many more. Taking a deeper look into the examples above reveals a common need for organization's geographically dispersed sales teams to be able to access documents locked in corporate files, dispersed in different locations, or even located hundreds of miles away.

### Image-In Connect Workflow Component

**Image-In Connect** empowers businesses with the right tools to automate their document processing needs related to their business applications, an essential requirement that too often is hard to find by other providers, or requires expensive customization. At Omtool, we are able to deliver this unique solution by using an innovative technology to map native application screens, the data currently displayed, and make that information readily available to AccuRoute and the downstream applications AccuRoute integrates with. This creates a completely automated document process and allows users to transparently connect documents being captured, processed or stored using the AccuRoute platform, with data from their native business application.

By creating profiles for the native screens users are already familiar with, and connecting them to the powerful document process automation capabilities of the AccuRoute platform, **Image-In Connect** can be configured to automatically recognize when a user is accessing those applications and allow them to easily:

- Create a coversheet for quickly capturing and associating business data with a document
- Create a "scan reservation", by dynamically creating a button on any supported MFP or copier to allow simple one touch document capture and integration
- Upload and link documents received electronically to the line-of-business application data
- Instantly view all documents previously captured and connected to the data currently being viewed in a business application
- Exchange data between the native application screen and a queue managed by Image-In Queue on the AccuRoute Server

This innovative and highly flexible technology allows virtually any line-of-business application to be extended to include the powerful document process automation capabilities of the AccuRoute platform, without custom programming.

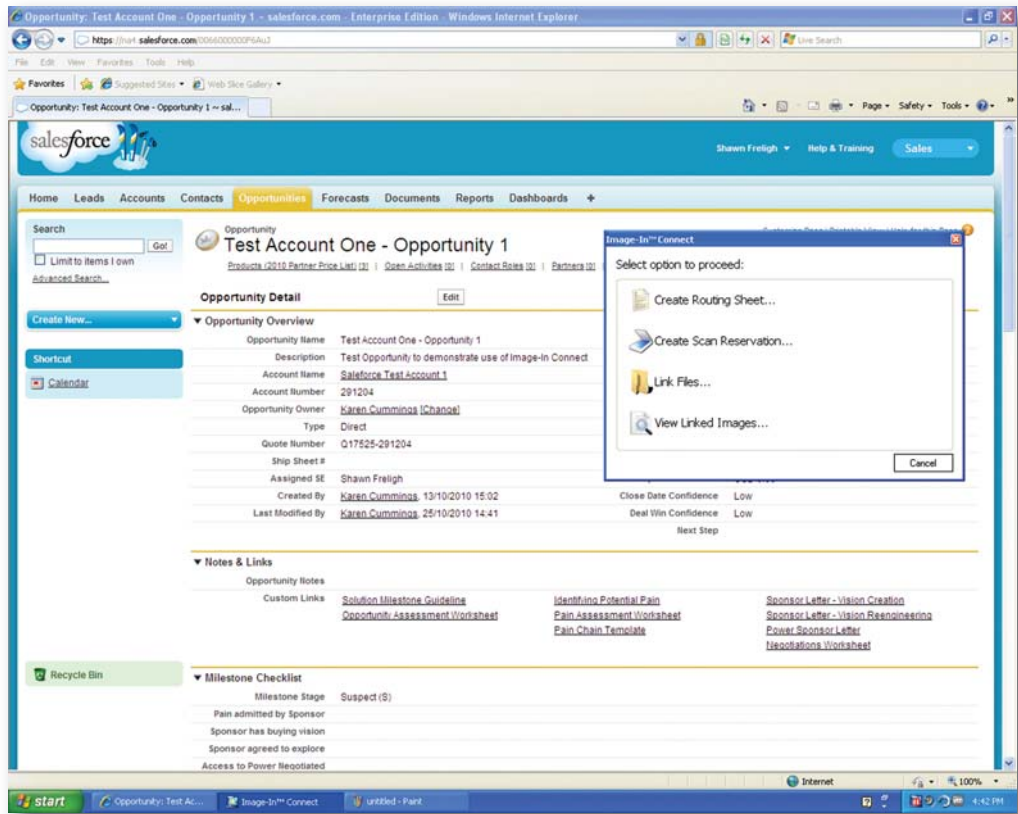
## Customer Relationship Management (CRM) Example

By mapping a primary screen from a commonly used web-based CRM system, **Image-In Connect** is able to deliver enhanced capabilities to these users, resulting in increased productivity, efficiency, and sustainability of the associated documents.

In the sample below, a salesperson has the option to create a routing sheet or a scan reservation, link electronic files and/or view any previously associated files to the customer opportunity they are reviewing. By providing the link between the CRM application and **Image-In Connect**, **Image-In Connect** is able to pull the key data elements from the CRM screen, such as "opportunity

name", "account number," and "account name." These key data indexes are then used for further processing with archive, storage, or delivery systems to ensure both the document and the key pieces of data are represented correctly.

The salesperson is able to easily retrieve previously associated documents related to this particular record by pulling key data indexes from the mapped screen, search strings are then created to pull back the documents directly associated with a particular record.



## Image-In Connect Benefits

- **Increase Accessibility** – By linking document images to line-of-business applications with their associated metadata, documents are readily available when they are needed.
- **Extend Document Reach** – For corporate documents not typically nor readily available for field-based employees, capturing documents within accessible applications extends the reach of documents well beyond corporate physical boundaries.
- **Greater Efficiency** – With increased accessibility and extended document reach, employees have greater efficiency in accomplishing tasks requiring handling/reviewing paper documents.

## Image-In Connect Product Requirements

Image-In Connect installs a lightweight desktop module and associated application configuration files (specific to each line-of-business application) stored on the AccuRoute Server.

Documents can be retrieved immediately after they are captured and stored in Microsoft® SharePoint®, ObjectArchive™, or any of the other many repositories supported by the AccuRoute platform.

Image-In Connect module requires:

- AccuRoute Server 3.01 FP1
- Image-In Desktop Module – Windows XP or Windows 7

## Image-In Connect facilitates solutions such as:

- Business continuity
- Litigation support
- Invoice processing
- Contract management
- Loan processing
- Forms automation
- Electronic health records
- Claims management
- Freight pay and document processing



## Omtool, Ltd.

Your trusted partner for document process automation solutions. For more information, please visit our website or contact one of our solutions specialists:

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