

### IMAGE-IN QUEUE

- Control in-process documents for review, data-entry/extraction, and deficiency management
- Facilitate e-signature and approval cycles
- Improve speed, processing, and time to revenue



Omtool's enterprise-class document process automation platform AccuRoute®, provides organizations of all sizes with a way to cost-effectively capture, process, deliver, and archive critical business documents. As a workflow component of the AccuRoute platform, Omtool delivers its **Image-In Queue** solution. This document workflow queue manager provides the ability to execute advanced document workflows, while providing an added level of review and intervention needed to carry a document through its required processes and checkpoints.

### Overview

**Image-In Queue** provides organizations with a secure and efficient way to manage their document queues through the AccuRoute document process automation platform. **Image-In Queue** gives users control of documents that are in-process and may require manual intervention or external system access to address deficiencies and exceptions (such as missing information or signatures). **Image-In Queue** provides the capabilities required to specify the stages a document must flow through and the criteria used to evaluate completion of each stage for that organization's processes. It automatically identifies documents that have not met all the criteria required for their defined process, and delivers the necessary means to manage queues of these documents until completion.

Automating a specific document process requires a captured document to proceed through one or more stages of:

- Additional data collection and/or validation
- Data exchange with other applications
- Visual reviews and/or approvals
- Collection of electronic signatures

Traditionally, managing business processes meant creating multiple copies of documents and creating inefficient manual processes for tracking documents and their required data collection, approval and signatures. Now, with the AccuRoute platform and **Image-In Queue**, users can easily capture documents and efficiently manage the entire queue process electronically.



## Document Process Automation

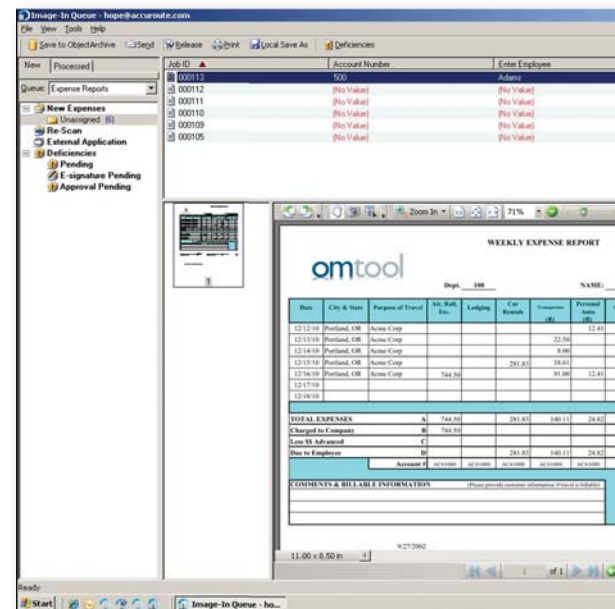
As document processes become more complex and require greater control of approval processing or capturing additional indexing data, organizations can count on Omtool to provide the most advanced technologies to meet these requirements. **Image-In Queue** rounds out many AccuRoute deployments to meet the needs of our clients and provide a complete paper document workflow enablement. For example:

- An employee scans an expense report that requires management approval and the account number for chargeback
- Documents must be reviewed for readability before being released to an organization's archival system
- Inbound faxes destined for an automated process utilizing encoded information from barcodes is not recognized and needs further manual review
- A medical records department has entered a medical record number that cannot be validated and needs to be reviewed
- A legal filing is supposed to automatically go into the litigation support system – but the matter number is missing
- An invoice needs proper approval and e-signature before payment
- Inbound documents must be collected and indexed to build shipping transactions

**Image-In Queue** can handle all of the examples above and many more while streamlining and digitizing these processes to achieve a more modern and efficient workflow. This eliminates having to walk documents from office to office and wait long periods of time for an approval.

## Document Queue Management

The **Image-In Queue** Workflow Component monitors documents that have been routed to one or more preconfigured queues. When a queue is initially configured on the AccuRoute Server its process criteria and data elements are created. This criterion determines the required assessment stages for the document process and the data elements or approvals that must be completed and/or validated before a document can move to the next stage. The **Image-In Queue** Workflow Component uses this information to determine the correct state of the document routed to the queue, and reevaluates the document when a change is made. The **Image-In Queue** Workflow Component facilitates this task continuously for every document in each queue defined on the AccuRoute Server.



## Image-In Queue Client

Depending on the criteria used when a document process queue is defined, many stages of the process may occur with no intervention. For example, if a document arrives in the queue with every required data element complete and validated, it can proceed directly to its destination. However, in some processes or for some documents, intervention may be required (such as a signature of approval). The **Image-In Queue Client** is the primary interface used to manage these interventions and address them in the most efficient manner.

### Queue Intervention

While a large combination of automated and user-driven process steps are possible, each can be categorized into one of three basic types of interventions:

- Completed by the user(s) responsible for managing the specific queue
- Requiring action by other users in the organization
- Requiring automated interactions, or data exchange with one or more outside applications or external processes

Interactions with business applications, or other external processes, may or may not involve the actions of a user. Although, the user managing the specific queue always has the opportunity to monitor documents waiting in these stages. The queue manager using the **Image-In Queue Client** can initiate interventions that require action by users other than the queue manager. The AccuRoute Web Client provides the interface needed to complete these required actions.

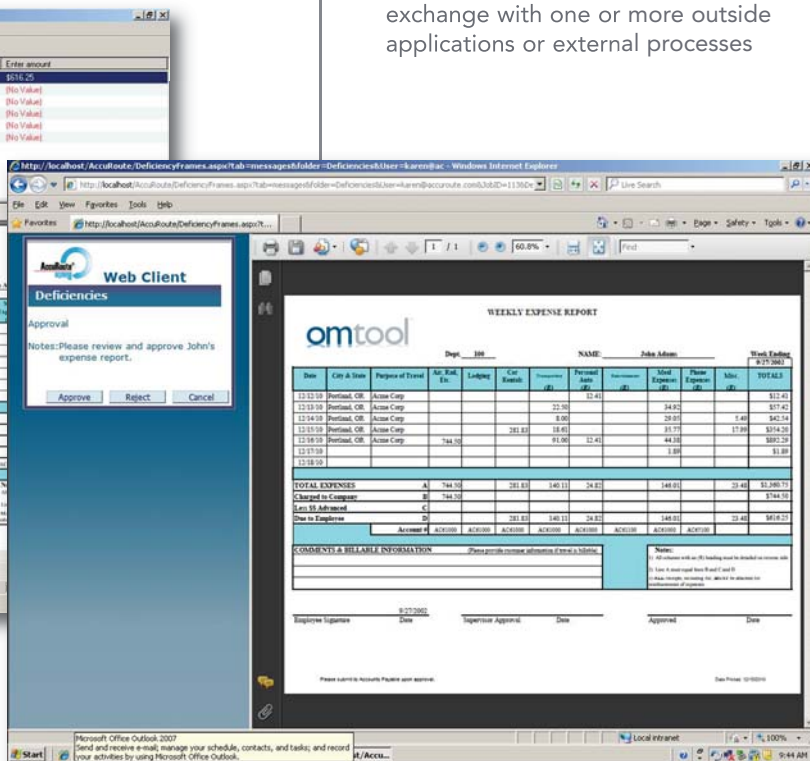
### Queue Status

The **Image-In Queue Client** displays the current state of all documents in the queue and allows the queue manager to view the document and relevant data.

When the Image-In Workflow Component is unable to move a document to the next step automatically, the queue manager is able to use the **Image-In Queue Client** to perform a range of manual interventions directly. The queue manager can complete or correct any missing or invalid data, request the rescan of one or more pages in the document, make annotations to the document, reassign the document to a different queue, or initiate a request for intervention by another user.

### User Notification

When an intervention is required, users receive a notification via email that includes a link to the AccuRoute Web Client. Following that link automatically leads the user to the specific document, and the information and instructions required for the action requested by the workflow component or queue manager. The user can then enter or edit information about the document, review and/or approve the document, provide an electronic signature, or perform a combination of these actions as required. Once the user completes this task the **Image-In Queue Workflow Component** automatically determines the next stage appropriate for the document.



### Image-In Queue Benefits

- **Confidentiality and Security** – With flexible rules, you can ensure confidentiality, and restrict **Image-In Queue** access to users by the line of business's they are assigned to, as well as, restrict permissions to actions and functions required for a particular user.
- **Greater Efficiency** – You can quickly combine multiple documents relating to a specific matter into a multi-page document set prior to being routed or archived, eliminating the need for the recipient to waste time looking through their e-mail or archives for related documents.
- **Eliminates Lost Documents** - The AccuRoute Server tracks, logs, and archives every document that is processed by the **Image-In Queue** administrator to minimize the chance a critical communication is lost or mishandled.
- **Improves Time to Revenue** - With early intervention and review, invoices, explanation of benefits, and billing documents can be approved and assumed complete to move quickly and efficiently.

### Image-In Queue facilitates solutions such as:

- E-signature routing
- Invoice processing
- Loan processing
- Contract management
- Audit document processing
- Shipping documentation
- Employee records
- Medical claims management
- Branch capture

### Image-In Queue Product Requirements

- AccuRoute Server 3.01 FP1 or higher
- Image-In Desktop Client – Windows 7 or higher
- AccuRoute Web Client – Internet Explorer 7.0 or higher



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