



Index eXpress | Product Overview

Across many organizations the need to manage and electronically capture large volumes of paper documents still remains a substantial cost of doing business, whether due to regulatory mandates or entrenched business practices. Historically workflow of processing these documents begins after they are scanned, indexed and committed to a repository. With this method, electronic capture and index speed depends primarily on manually intensive, highly rigid tasks.

What is Index eXpress?

To expedite indexing after document capture and add a full range of business process management capabilities to the post-capture indexing and verification processes, TriTek Solutions has developed Index eXpress. This solution is based on TriTek's award-winning Trans@ction eXpress application processing framework and offers the same high level of configuration flexibility. No changes are required to scanning operations, since Index eXpress supports patch codes, barcodes, blank page detection, ADR and all other capture technologies.

Index eXpress Functionality

There are five main components of Index eXpress that provide the basic functionality required for a streamlined indexing process:

Commit: Prior to indexing, document batches are committed to a content repository as a single document with index and partitioning information stored as document properties. The creation of content generates a workflow that routes the batch and assigns priority levels based on predefined business rules.

Process: Users access queues and batches of scanned documents through a specially designed interface that allows users to navigate through the documents in a batch, view the documents and complete index fields for each document. In addition, users can move, delete and copy pages, alter document partitioning and request rescans.

Batch Manipulation: All changes to the batch occur on the client side of the application, rather than the underlying document. Index eXpress updates the document with information to reflect how the series of images in the batch

are partitioned into documents and their various index values.

Finalize: A background step converts original batch documents, index values and partitioning information into individual documents and document classes. The original batch document is deleted during this process to minimize system impact.

Rescan: If a document is marked for rescan, a workflow is launched to rescan the appropriate image while the remaining documents are extracted, so as not to hold up processing of correctly scanned documents.

Supplementary Features

Beyond the core functionality mentioned above, Index eXpress offers additional features to extend the value of the solution through flexible configuration options:

Workflow Step Configuration: Additional workflow steps may be added to a batch of documents, such as quality review or reconciliation.

Index Field Configuration: Sets of index fields may vary based on batch type and may be altered to account for different document types.

Index Validation: By using a unique identifier integrated with and validated through a legacy system, a user can populate remaining index fields with stored account information.

Reporting: Since all indexing occurs in the BPM environment, the full complement of workflow reporting capabilities may be leveraged through Index eXpress.

Management Tools: All workflow management tools provided through the BPM system and Trans@ction eXpress are available to Index eXpress users.

