

**Solution Brief: Image Capture & Workflow**

# Xerox FreeFLOW<sup>™</sup> SMARTdocument Travel<sup>™</sup>

## Office Solutions Overview

*Xerox's commitment to meeting and exceeding customers' document-related challenges in the office has never been more evident. Working closely with our Xerox Business Partners, we custom-build solutions that leverage the power and flexibility of Xerox office technology.*

*Through partnerships, technology, and business process innovation, Xerox makes your work... flow.*

*This solution overview will provide you a brief description of how Xerox and our partner offerings continue to deliver solutions that satisfy your unique office workflow challenges, today and tomorrow.*

## Overview

SMARTdocument Travel is a software product which provides Xerox customers with the ability to address their document processing requirements. These requirements generally fall into the category of automating daily business processes associated with documents. SMARTdocument Travel connects Xerox multi-function devices to document management systems such as DocuShare, Microsoft SharePoint, Hummingbird, iManage and others. It supports the Xerox WorkCentre Pro and Document Centre suites of devices.

SMARTdocument Travel extends the functionality of the Xerox devices into the core of the customers' business. Whether a legal firm, an HR organization or a healthcare institution, document processing requirements are beyond the basic functionality of the MFP. After the documents have been copied, scanned or printed on the device, the documents travel through the different organizations for further processing. This solution is best utilized in organizations with repetitive document processing workflows that require automated document processing processes such as:

- optical character recognition
- image character recognition
- watermarking
- file encryption

- forms recognition
- barcode recognition
- file conversion (PDF, Word, Excel, etc)
- image processing (deskew, despeckle, background suppression, etc)

SMARTdocument Travel focuses on the journey of the document after it leaves the device.

Users are able to give instructions at the device panel, through printed coversheets or their desktop, to specify the work-flow required for the document. The data entered at the device, on the coversheet or at the desktop along with the image and other data extracted from the document will then be sent to backend document management systems for indexing and archival.

As an example, an HR organization may receive employment application forms that need to be archived. SMARTdocument Travel enables the HR staff to scan the documents at the Xerox device and enter a department ID at the panel of the device. The documents will then be automatically processed, and the key information on the application, such as employee name and number of years of experience, will be extracted and the information will be archived under the department ID for later use.



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*SMARTdocument Travel is powered by Autostore<sup>™</sup>*

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In addition to the above functionality SMARTdocument Travel provides three-way desktop integration:

1. Scansoft's Paperport (aka Scan to PC Deluxe) into SMARTdocument Travel – Directly send documents from PaperPort to business applications using the SMARTdocument Travel PaperPort client.
2. SMARTdocument Travel Can Connect to Users – Use SMARTdocument Travel to send files to any user that has logged into the network. SMARTdocument travel identifies the logged in users and routes documents to them based on User ID! Simple and effective, SMARTdocument Travel's Send-to-PC enables the WorkCentre Pro devices (or any other source of document) to directly communicate with logged in users. Simply walk up to the device, type the user's name and press Start.
3. Desktop to SMARTdocument Travel – Using the AutoCapture interface, users can right click on any file on their PC and send to the desired destination. SMARTdocument Travel AutoCapture interface allows direct connectivity from desktop the same way the WorkCentre Pro devices are connected.

## Benefits

### Quick ROI:

Typically the major costs associated with document processing are:

- *Manual processing of documents by a large staff*
- *High shipping costs*
- *Lengthy processing time*
- *High error rates in processing*

SMARTdocument Travel addresses every item on the above list.

- *Because of automated processing, the customer staff can spend their resources on more important tasks than manually processing documents.*
- *Documents can be scanned/copied/printed at remote sites and the information can be transferred to a central site electronically.*
- *Due to automated processing, tasks are completed more efficiently.*
- *Eliminating manual data entry tasks increases the accuracy of the operations.*

### Open Architecture:

SMARTdocument Travel is an open platform. This means that it can fit into any customer environment where they might have legacy applications and business processes that are not standard. The product can easily be integrated with these legacy applications.

### Ease of Use:

SMARTdocument Travel is managed centrally by the customer's IT staff and end users do not need to know any of the back-end processing. Any modifications to the business processes or the IT environment will be managed centrally without the knowledge of the end user.

### Unified Capture:

Although the majority of documents are initially processed at the Xerox devices, the customer may have some documents that come from other sources such as e-mail, desktop or other non-Xerox devices. SMARTdocument Travel can handle several different sources.

## Specifications

### System Configuration:

- *Windows NT 4.0 Server, Service Pack 5 or Windows 2000 Server, Service Pack 2 must be installed*
- *Support Database Engine client, such as Microsoft Exchange 5.5 with Service Pack 3, Lotus Notes 4.6.X, or any other supported client application, must be installed*
- *A minimum 128 MB of dedicated RAM must be available*
- *120 MB of free hard-disk space must be available*

### Devices:

*Xerox WorkCentre® Pro, Xerox Document Centre™*

### Document Management Systems:

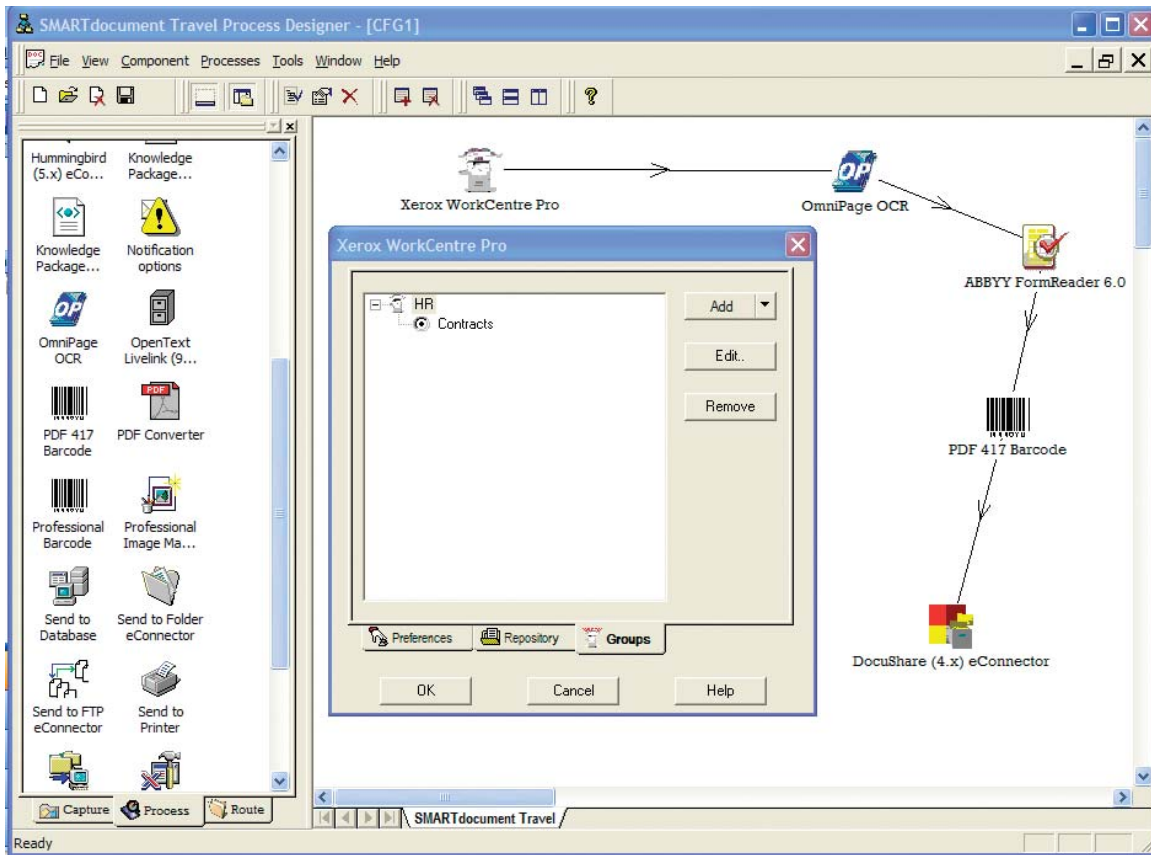
*DocuShare, Domino.doc, iManage, TRIM Context, TRIM*

*Captura, Documentum, FileNet, Hummingbird, ApplicationXtender, IXOS, any ODBC Complaint Database*



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The above is a screenshot from the SMARTdocument Travel Process Designer. This tool is used by the Systems Administrator to set up a document workflow that addresses the document processing and routing needs of the end user. The Process Designer is a simple drag and drop icon based workflow creation tool that utilizes popup wizards to guide the administrator through the design process. The Process Designer does not utilize proprietary or complex programming languages. Administrators have the ability to introduce server based processing or destination features into a workflow such as OCR, ICR, barcode recognition, forms recognition and others simply by dragging the appropriate icon into the process design window. Once the capture workflow is in place, it runs as a Win32 service in the background on the SMARTdocument Travel server. In addition the server will also push the workflow configuration files to any number of MFD's identified by the administrator. Based on the configuration file the MFD will display a scan template on the panel of the MFD that can be used by the end user to initiate the predefined document workflow. That is the last time the administrator will need to manage the SMARTdocument Travel server. Anytime new workflows are introduced into the process, the administrator configures the new workflow on the server and transfers the configuration to the devices. This feature simplifies the management of the devices on the network.

SMARTdocument Travel is a server-based application. The everyday users of the system do not directly interact with any of the Process Design components mentioned above. After the system configuration is complete, end users simply walk to their Xerox MFD, place the documents on the scanner and select the appropriate scanning template on the panel of the device. A single touch and documents are scanned into the administrator defined workflow.