Benefits

- Reduces transfer time and the risk for mistakes
- Keeps the barriers to adoption low and developed configuration quality high
- Easily share developed configurations throughout the enterprise
- Use configurations 'as is,' or as a starting point to meet specific needs
- Tailor output to customer requirements
- Supports an agile methodology by repeating the Configure » Select » Execute » Review cycle

The Delivery Challenge

IBM FileNet P8 is a powerful content management system designed to ingest and maintain millions of documents. But sharing these documents with business partners, customers, and vendors has always been a challenge. It takes a lot of manual effort to selectively package, format, and deliver requested documents.

Whether to package and sell loans in the financial industry, deliver pertinent documents in a legal disclosure or migrate documents from one system to another, the need to consistently deliver large sets of documents in specific delivery formats is critical.

Our Solution

Pyramid Solutions' Agile eXporter can select, format, and deliver large sets of documents on-demand or in a scheduled sequence. It connects to IBM FileNet P8 repository and then, based on a document or business object list, Agile eXporter retrieves the requested documents and organizes the content based on instructions set. The final export package includes a cover page, table of contents, and a set of files and directories that contain the documents in a customized structure. Agile eXporter can:

- Create and export jobs direct from IBM Content Navigator.
- Seamlessly integrate into IBM Process Engine and other case management applications.
- Filter and retrieve documents based on type or specific properties.
- Translate document properties according to customer naming standards.
- Rename documents based on their properties and system variables.
- Convert all documents to PDF, TIFF, or the industry standard.
- Arrange documents in a set of folders designated by file properties.
- Generate and include document manifests, table of contents, success/failure reports, and a cover page that includes a QR barcode into every export.
- Perform document traceability for auditing or in a "trailing documents" scenario in which an already exported document should be excluded in future export jobs.
- Archive and compress the documents into a specified set of files, then password-protected files can deliver the output to a specified directory.
- Export documents to a network share, custom web applications, or as an email attachment.

Rather than placing documents into a flat, unorganized structure, users can specify the configuration for an entire list of documents. Agile eXporter performs the download and repackaging automatically. You can also use it to process thousands of documents from hundreds of business objects, providing an agile and efficient method to conduct bulk transfers.

PYRAMID SOLUTIONS

Gold
Business
Partner

IBM

Competency
Digital Business Automation
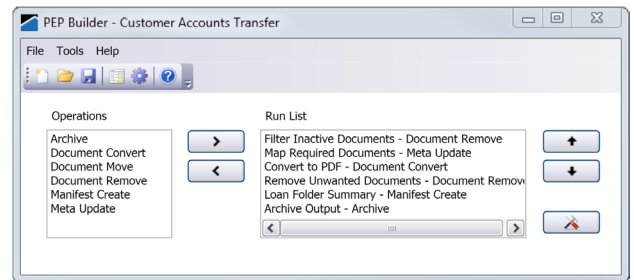
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About Pyramid Solutions

Pyramid Solutions, an IBM Business Partner, specializes in Business Automation Workflow, Capture, RPA, and Cloud technologies that drive growth through best-in-class solutions. With our unique combination of industry expertise, strategic thinking, and technology leadership, Pyramid Solutions solves business and technology challenges by delivering visionary solutions that produce exceptional results.

Applications Examples

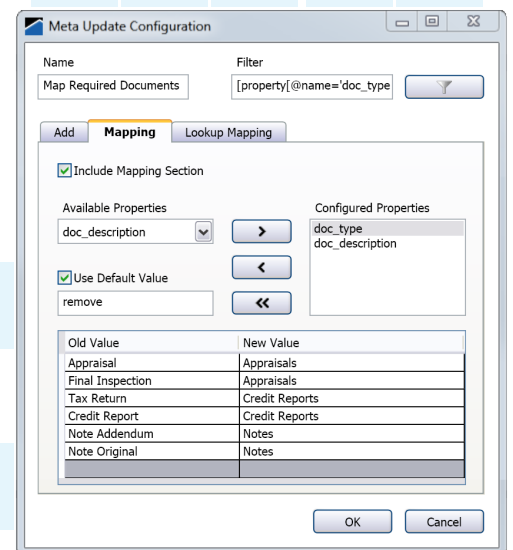Agile eXporter provides a comprehensive and flexible way to package documents for a variety of uses:

- *Mortgage loan sales:* Agile eXporter allows for multiple loans to be exported, scrubbed, packaged and made ready for investor review. Documents can also be prepared and delivered in MISMO format for FHA insurance review and approval.

Build a set of steps to reformat, tag, and package documents according to business requirements.

- *Legal proceedings:* select only the documents that need to be legally reviewed, convert to PDF, and deliver in a password-protected zip file.

- *Customer account transfers:* active portfolio documents can be packaged and delivered to customers to start a new account. Document properties can be automatically updated to match the new account standard.

- *Patient records:* patient medical records can be grouped by patient then safely and securely exported for the patient or other healthcare providers in accordance with HIPAA regulations.

- *Claims processing:* required claims forms and accident reports can be extracted and packaged. All of the documents can be converted to PDF format to prevent modification.

- *Data migration:* Agile eXporter can be used to prepare content when documents need to be transferred to another system.

- *Manifest file generation:* manifest files can be generated that capture the content of the export, providing a complete audit that ensures traceability and procedural compliance.

Benefits

Agile eXporter puts the delivery process in the hands of the business user with an agile methodology by repeating the Configure ➜ Select ➜ Execute ➜ Review cycle enabling users to create their intended outcome one iteration at a time. This keeps the barriers to adoption low and the developed configuration quality high. Developed configurations are easily shared throughout the enterprise; coworkers can use them 'as is', or as a starting point to meet their specific needs. Output is tailored to customer requirements to ensure that content is easily ingested at the receiving end.

Modify document tags in exported documents, which is useful when the recipients' definitions differ from the originating system.