



## Electronic Document Handling

### overview

To ease the transition of moving from a paper-based to an electronic document process for a major insurance company, Technology Services Group partnered with Snowbound Software to jointly design a solution with the customer using Documentum, Snowbound's FlexSnap SI, and Raster Master SDK. With the goals of increasing user productivity and ensuring document integrity, the functions in the paper process were replicated and wrapped in a custom web-browser based application. The tight integration of the Snowbound products with Documentum ensures all features of Snowbound's markup and document manipulation applet are available while ensuring full auditing of user actions and maintaining the integrity of the original document.

### Solution

By implementing the following features, the application closely mirrors how users interact with paper documents.

- **Annotating and Bookmarking**— Annotating functions such as highlighting, rubber stamping, drawing boxes and polygons, and sticky notes/text boxes are available. The user can also add a bookmark to one or more document pages and use them to jump forward and backward in the document.
- **Document Manipulation** – The application integrates the Snowbound Page Manipulation feature with Documentum in order to secure the original document and enable the user to version the document. Once versioned, the user may move pages within and between documents in order to make it more usable or correct document grouping errors.
- **Preview Images** – To help users find the document they want quickly, an image of the document's first page is rendered by the application and stored. Users can quickly scroll through the preview images to identify the document needed without opening the entire document.
- **Audit Trail** –With electronic documents, the application, rather than a person, now logs events and actions made by the user. This ensures that a complete audit trail and document history is available for internal and discovery processes.

### result

As designed, the solution is entirely web-based, requires no client machine install, and improves the flexibility of the insurance claims process: processing work can be carried out by geographically distributed teams. And, unlike many imaging solutions, it allows the user to manipulate the documents to increase the documents usability. The result is a reduction in the time to process a claim and better customer service for policy holders.

### contact information

If you are interested in further information, please contact Dave Giordano at [daveg@tsgrp.com](mailto:daveg@tsgrp.com) or by phone 312.372.7777 x201.

### solution overview

**industry**  
Insurance

### challenge

Simulate the user's paper document functions in an electronic document environment.

### solution

A web-based application that integrates Snowbound Software and Documentum to perform annotations, bookmarking, page reordering and deletion while maintaining original document integrity.

### result

Streamlined document handling processes that decrease the time to process insurance claims and replicate the users' paper environment leading to improved customer service.