

**Total Solution, Inc.**

# **DocPipes Module List**

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## Couplers

Used to connect DocPipes to existing systems or document sources. May appear at the beginning, middle, or end of a process.

### *Input Modules*

Hook traditional document sources into DocPipes

- **Email Reader**  
Watch an email address and take any incoming documents and start them into a document processing stream
- **Outlook Mail Coupler**  
While inside of Outlook, select an email and send that email directly to an ECM repository
- **Filesystem Reader**  
The Filesystem Reader polls a Windows filesystem path. When new files appear in this path, the Filesystem Reader will extract them from the filesystem, create new DocPipes documents, and start those documents into a DocPipes document-processing stream.
- **SFTP Reader**  
The SFTP Reader polls a path in a remote filesystem via SSH, using the protocol's SFTP feature. When new files appear in this path, the SFTP Reader will extract them from the filesystem, create new DocPipes documents, and start those documents into a DocPipes document-processing stream.

### *Output Modules*

Export finished documents from DocPipes

- **Email Sender**  
When a DocPipes document appears in the inbound queue of the Email Sender, this module creates and sends an email message to the recipient designated in the DocPipes metadata.
- **Filesystem Loader**  
Typically used as the final step in a DocPipes process, the Filesystem Loader uses the documents metadata to automatically create a filing structure and implement the specified document naming convention.
- **SFTP Sender**  
Typically used as the final step in a DocPipes process, the SFTP Sender uses document metadata to automatically create a filing structure and implement the specified document naming convention.

### *Repository Connectors*

Connect DocPipes to document and content Repositories

- **Fileroom Reader**  
The Fileroom Reader allows for the monitoring of a complete filing structure, watching for changes that have occurred since the last read. Changes are identified based on the file date being more recent than the "last read" date stored in the readers configuration data.

- **Fileroom Loader**  
Similar to the Filesystem Loader, the Fileroom loader is typically used to create a filing structure and implement a naming convention. The major difference is that the Fileroom Loader can implement a greater set of actions upon collision with an existing filer room object.
- **Open Text LiveLink Reader**  
The Livelink Reader fetches a document or set of documents from an OpenText Livelink Repository.
- **Open Text LiveLink Loader**  
The LiveLink Loader loads DocPipes documents into an OpenText LiveLink repository. Files and certain metadata are inserted into a folder structure based on the DocPipes document's metadata.
- **Open Text Enterprise Publishing Reader**  
The Enterprise Publishing Reader fetches a document or set of documents from an OpenText Enterprise Publishing Repository.
- **Open Text Enterprise Publishing Loader**  
The Enterprise Publishing Loader loads DocPipes documents into an OpenText Enterprise Publishing repository. Files and certain metadata are inserted into a folder structure based on the DocPipes document's metadata.

## ***Workflow Synchronizers***

Connect DocPipes to Workflow Products

- **Kofax Ascent Batch Loader**  
The Ascent Batch Loader loads DocPipes documents into a Kofax Ascent Capture batch class. This module is particularly useful for creating batches in Kofax where further value add processing may be performed.
- **Kofax Ascent to DocPipes Release Script**  
The Ascent to DocPipes Release is a standard release script that releases documents from Kofax Ascent Capture directly into a DocPipes process.

## ***Process Synchronizers***

Connect remote or asynchronous process segments together

- **Job Receiver**  
The Job Receiver is a web service that accepts an XML job ticket, and from that ticket produces a new DocPipes document or set of documents. The job ticket communicates the document metadata, document links or documents, and processing instructions.
- **Enterprise Publishing Job Dispatcher**  
This connector is a plugin for the OpenText Enterprise Publishing environment. It connects to the Job Receiver to deliver documents from an Enterprise Publishing repository to a DocPipes process.

## ***Data Synchronizers***

Hook DocPipes up to external data sources

- **SQL Synchronizers**



This bi-directional utility moves data between the DocPipes process and a database. The SQL Synchronizer connects to a relational database to execute a single SQL command and capture the result set that it returns.

- **URL Synchronizers (Script Host)**  
Open a document and check to see if it has any references (URL's) to other documents. If so, go get the object that is at that reference and bring a copy of that document into the process
- **Websheet Synchronizers**  
Update a Websheet XML when a document passes a certain point in the process

## Controllers

Used to create logic in document processing stream, allow for documents to be batched or segregated, and allows for creation of process loops and timed states

### **Batch Controllers**

Used to create or manipulate a set of documents (batch)

- **Batch Creator**  
Take documents and, based on a particular metadata value, group these documents into a batch
- **Batch Collector**  
Watch a process flow, and, based on the achievement of completeness, create a batch of documents
- **Batch Splitter**  
Take a batch of documents and split into individual documents
- **Document Splitter**  
Take a document and split it into individual sub-documents
- **Document Remover**  
Dispose of documents that are no longer needed in the process
- **CSV Splitter**  
Open a comma delimited file, grab information and place it into the processes metadata
- **XML Splitter**  
Take a document and split into XML fragments
- **Email Splitter**  
Take an email document and split off the attachments and make them into separate documents

### **Flow Controllers**

Used to control documents flow within a process

- **Flow Document Volume Restrictor**  
Based on document count, restrict the number of documents that flow past a certain point in the process
- **Flow Size Restrictor**  
Based on cumulative file size, restrict the number of documents that flow past a certain point in the process
- **Flow Page Volume Restrictor**  
Based on page count, restrict the number of pages that flow past a certain point in the process
- **Flow Distributor**  
Based on a set percentage, split a process flow and send the predefined percentage of documents through each of the possible output paths
- **Flow Router**  
Based on process metadata, split a flow and send it through the predefined routes

- **Process (Timed) Wait State**  
Have a set of documents sit and wait until a specified time has passed
- **Process (Event) Wait State**  
Have a set of documents sit and wait until a specified event occurs

### ***Process Controllers***

Used to control overall process' behavior

- **Event (Email) Notifier**  
Notify someone via email that an event has occurred
- **Event Alerter**  
Send an event notification to someone's monitor

## **Monitors**

Used to monitor the various aspects of a process, allow for tracking of document progress, and highlights and illustrates the overall process completeness

### ***Work Monitors***

Allows for users to view and prioritize the work needs to be performed

- **TouchPoint Monitor**  
Monitor the amount of time that humans have spent on a particular step in the process
- **Web TouchPoint Monitor**  
Monitor the amount of time that humans have spent on a particular step in the process

### ***Process Monitors***

Allows for the monitoring of how the overall process in performing

- **Process Monitor**  
Monitor the progress of documents in the process
- **Process Analytics/Performance Monitor**  
Monitors the performance of the process
- **Process Accounting Monitor**  
Monitors the amount of time that the process is taking
- **Web Process Monitor**  
Monitor the progress of documents from a web based viewer

### ***Completeness Monitors***

Allows for the monitoring of the overall complete a processes results

- **Websheet Completeness Monitor**  
Set the rules that identify when a process is complete and constantly monitor the process and report the status of that completeness



## TouchPoints

Interactive modules where people perform work. They can be specialized to any type of clerical or expert work, and are highly optimized and hyper-efficient tools maximize human efficiency.

### ***Edit Points***

Used to modify images or documents

- **Image Edit Point**  
Allow a person to edit and remove pixel dirt that is on an image
- **Split, Merge, and Index Point**  
Add or remove document splits. Add or modify document metadata

### ***Index Points***

Used to manually extract index data from documents

- **Index from Image (Audit Point)**  
Allow a human to view a document and type data into an appropriate set of fields
- **PDF Metadata Extractor**  
Extract metadata from a PDF file for use in index or process instructions
- **TIFF Metadata Extractor**  
Extract metadata from a TIFF file for use in index or process instructions
- **Extracted Metadata QA**  
Allows manual verification of extracted metadata

### ***Zoning Points***

Used to manually tag areas of documents with metadata

- **Tag Zone on Image**  
Allow a human to rubber band zone an area on an image and send the information in that zone forward for further processing
- **Tag Zone on PDF**  
Allow a human to rubber band zone an area on a PDF and send the information in that zone forward for further processing
- **Tag Zone and Associate Reason**  
Allow a human to rubber band zone an area on an image and associate metadata values (such as reason codes) with that zone
- **Unselected Zone Remover**
- **Auto Tag from Template**
- **QA Tagged Zones**

### ***Redact Points***

Highly optimized to perform the tasks associated with redaction of information on documents

- **Simple Redaction**  
Place redaction at any point in a word on a document. Real time document redaction
- **Simple Redaction QA**

View the original and redacted documents. Reload and re-redact on a page, document, or batch level. Add additional redactions

- **Reason Code Redaction**  
Redact Items Based on Preset of Custom Reason Codes. Add Reason codes “on the fly”.
- **Reason Code Redaction QA**  
QA Redactions/Reason Code Choices
- **Lexical Redaction**  
Automatically Redact Based on Predefined Patters (i.e. SS Number, Bank Account Number, Credit Card Numbers, Bates Number, Account Number). Automatically Redact based on Custom Number or Character Patterns.
- **Lexical Redaction QA**  
Ability to QA redaction results received from the Lexical Redaction
- **Zone Redaction**  
Select a Zone to Redact. Allows paragraph level Redaction. QA Redaction Choices. Apply Standard Redactions across document collections (Ex. Bates Number)
- **Redactor**  
Applies both “Fill Black” and Fill White Redactions. Applies Reason Code to Redacted Section. Overwrites Pixels rather than annotates

## **QA Points**

Highly optimized to allow the human to perform various type of Quality Assurance.

- **Image Editing QA**  
View both the original image and the edited image and approve, modify, or reload and re-clean the image
- **Document Splits QA**  
View a group of documents and split or recombine the pages and documents
- **Tagged Zones QA (thumbnail based)**  
View all the zones selected by the Create Zone on Image module
- **Extracted Text QA (Text Verification)**  
View the original image and extracted text, correcting the extracted text
- **Fileroom Conflict Resolver**  
When the look ahead module has identified a conflict, allow the human to view both the existing filerom document and the new document, and decide how to resolve the conflict
- **Fileroom Look Ahead**  
Find out if a new document that is being processed is going to collide with an already filed document (same name or filing path)

## Converters

Used to interchange documents between formats

### *Image Converters*

Converts images to and from TIFF format

- **TIFF to PDF Image**  
Convert a TIFF document into an Image only PDF document
- **TIFF to PDF Searchable**  
Convert a TIFF document into a searchable PDF document
- **Email to TIFF**  
Take the body of an email document and turn it into a PDF document
- **Word to TIFF**  
Convert a Word document into a TIFF document
- **Excel to TIFF**  
Convert an Excel document into a TIFF document
- **HTML to TIFF**  
Convert an HTML document into a TIFF document
- **XML to TIFF**  
Convert an XML file into a TIFF document

### *PDF Converters*

Converts images to and from Adobe PDF format

- **PDF to TIFF G4**  
Convert a PDF documents into a bi-tonal (Black & White) TIFF document
- **PDF to TIFF Color**  
Convert a PDF document into a color TIFF document
- **PDF to TIFF Mixed**  
Convert a PDF document into a mixed TIFF document, where each page is either color or bi-tonal, depending upon the original page's color depth
- **Email to PDF**  
Take the body of a email and convert it into a PDF document
- **Word to PDF**  
Convert a Word document into a PDF document
- **Excel to PDF**  
Convert an Excel document into a PDF document
- **HTML to PDF**  
Convert an HTML page into a PDF document
- **XML to PDF**  
Convert an XML file into a PDF document

### *Hypertext Converters*

Converts images to and from HTML format

- **Word to XML**  
Convert a Word document into an XML document
- **Excel to XML**  
Convert an Excel document into an XML document
- **XML to Word**  
Convert an XML document into a Word document
- **XML to Excel**  
Convert an XML document into an Excel document
- **XSL Transform**
- **Word to HTML**  
Convert a Word document into a HTML document
- **Excel to HTML**  
Convert an Excel document into a HTML document
- **HTML to Word**  
Convert a HTML document into a Word document
- **HTML to Excel**  
Convert a HTML document into an Excel document

### ***Intelligent Text Converters***

Converts images to and from PrimePRO format

- **TIFF to Intelligent Text**  
Convert TIFF to Intelligent Text (PRO)
- **PDF to Intelligent Text**  
Convert PDF document to Intelligent Text (PRO)
- **XML to Intelligent Text**  
Convert XML document to Intelligent Text (PRO)
- **HTML to Intelligent Text**  
Convert HTML document to Intelligent Text (PRO)
- **Intelligent Text to XML**  
Convert Intelligent text to XML document
- **Intelligent Text to HTML (PRO)**  
Convert Intelligent text to HTML document

### ***Other Converters***

Performs other types of conversions

- **XLS to CVS**  
Convert a Microsoft Excel file to a comma separated value file

## Manipulators

Used to change a documents metadata or presentation

### ***Metadata Manipulators***

Used to change metadata

- **ScriptHost**  
Allows the use of Visual Basic Script to add code that helps the workflow of the process
- **Rules-Based Indexing**

### ***Email Manipulators***

Combine, split, or create email documents

- **Email Deduplicator**  
Compares email in a repository or in process to eliminate duplicate emails
- **Email Dechainer**  
Separates each item of correspondence in a series of “Back and Forth” emails

### ***TIFF Manipulators***

Allows for automated standardization of TIFF images

- **TIFF Margin Setter**  
Automatically set the border margin on an image, resizing the image to fit within the defined border
- **TIFF Document Resolution Setter**  
Sets the resolution of a TIFF file
- **TIFF Page Re-sizer**  
Resize a TIFF file to a specific size
- **TIFF Page Auto-rotator**  
Rotates a TIFF file to a specified angle

### ***PDF Manipulators***

Allows for automated manipulation of PDF documents

- **PDF Bookmarker**  
Adds bookmarks to PDF files
- **PDF Combiner**  
Combines multiple PDF files into one file
- **PDF Manipulator**  
Changes a PDF file
- **PDF Page Auto-Rotator**  
Rotates a PDF file to a specified angle
- **PDF Text Inserter**  
Open a searchable PDF file and embed hidden text
- **PDF Text Extractor**  
Open a searchable PDF file and extract the hidden text

## Extractors

Used to extract metadata or documents

### ***Metadata Extractors***

Used to extract metadata from objects

- **ScriptHost**  
Allows the user to write their own VBScript code to be executed
- **Email Extractor**  
Read an email's header and body, and, based on the content, set DocPipes metadata values
- **CSV Extractor**
- **TIFF Color Depth Checker**  
Check an image document to see if there is any color or grey-scale pages in it
- **TIFF Metadata Extractor**  
Automatically extract metadata from a TIFF file for use in index or process instructions
- **PDF Text Extractor**  
Automatically extract text from a PDF file for use in index or process instructions
- **PDF Metadata Extractor**  
Automatically extract metadata from a PDF file for use in index or process instructions