Document Viewer

The document viewer is a new feature available in RMEx GUI 4.0.0.

This option gives the user the ability to view scanned documents or images associated with individual accounts (case numbers). You can also use any scanner to scan and archive new documents.

The RMEx Document Viewer currently supports most types of documents and images. You can access this feature through a button available on top right hand side of the account detail screen as shown below.

Once you click on the 'Document viewer' button it will be opened in a separate window listing all the documents and images related to the account. You can then preview the documents / images or view them by clicking on them.

Through the document viewer, the user will be able to see the list of documents available on the left pane, as shown in the example below.

In the above example, selecting the .txt file could show the stored information following in on the right pane or on a different window as follows. Note that the documents could be more meaningfully named so their content is easy to recognize. E.g. 011322223.ItemizedBill.pdf

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qserver.quantraxhost.com/scan/SCDATAFC/98140160001/140160001-1.txt - Google Chrome

qserver.quantraxhost.com/scan/SCDATAFC/98140160001/140160001-1.txt

I-Biz - Quantrax's Business Intelligent Platform

OLAP - Online Analytical Processing

Data Mining - the extraction of hidden predictive information from large databases,
                 is a powerful new technology with great potential to help companies

Text Mining -  to process unstructured (textual) information,
                  the process of deriving high-quality information

Benchmarks - key financial ratios developed from information
                  provided by businesses on activity statements and tax returns

Crystal Reports - a business intelligence application used to design
                     and generate reports from a wide range of data sources.
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Users must be trained to close the tab they used to view the documents or images once they are done with the account, since they may be confused with having too many documents or images open when they go to the next account.
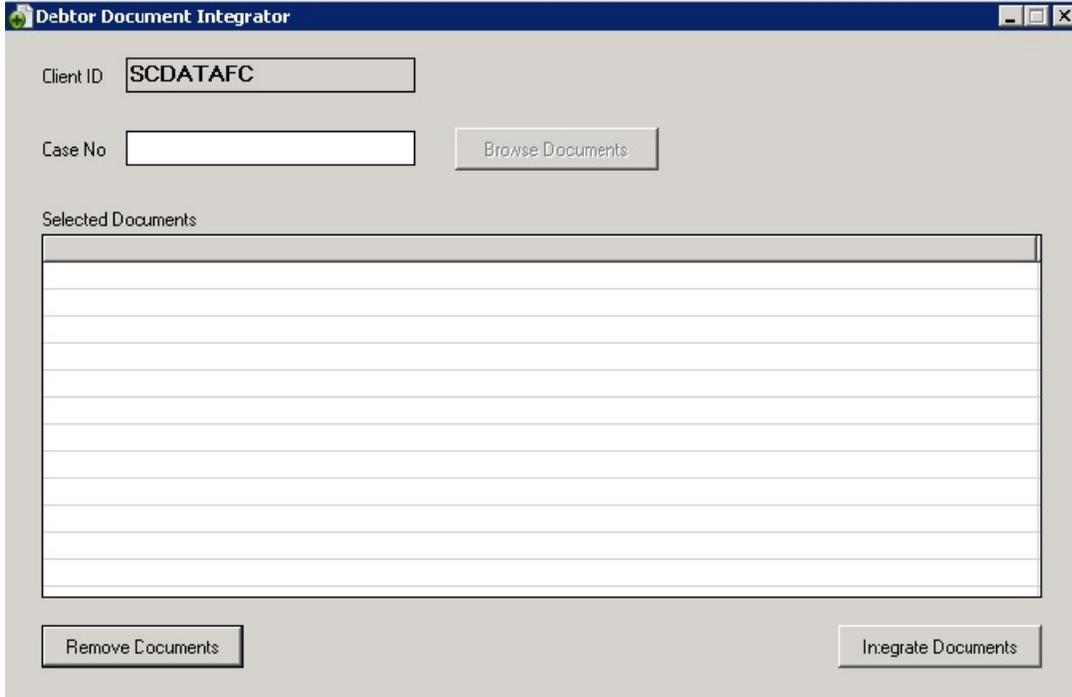
Migrating old scanned documents to a format compatible with the document viewer.

- The client needs to provide us with mapping details for the old scanned documents and explain how the documents are associated with individual accounts

- Our team will write a custom conversion program which will get all the documents mapped and linked to existing RMEx accounts

Scanning new documents into the system

- The physical documents need to be scanned using a scanner and any basic scanning software

- We recommend that documents to be scanned in PDF format

- The naming convention that is recommended for the scanned documents is account#_sequence#_ProperDescriptionOfTheDoc

• The RMEx document integrator software needs to be used to integrate the newly scanned documents with the accounts in RMEx. (See below for the steps.)
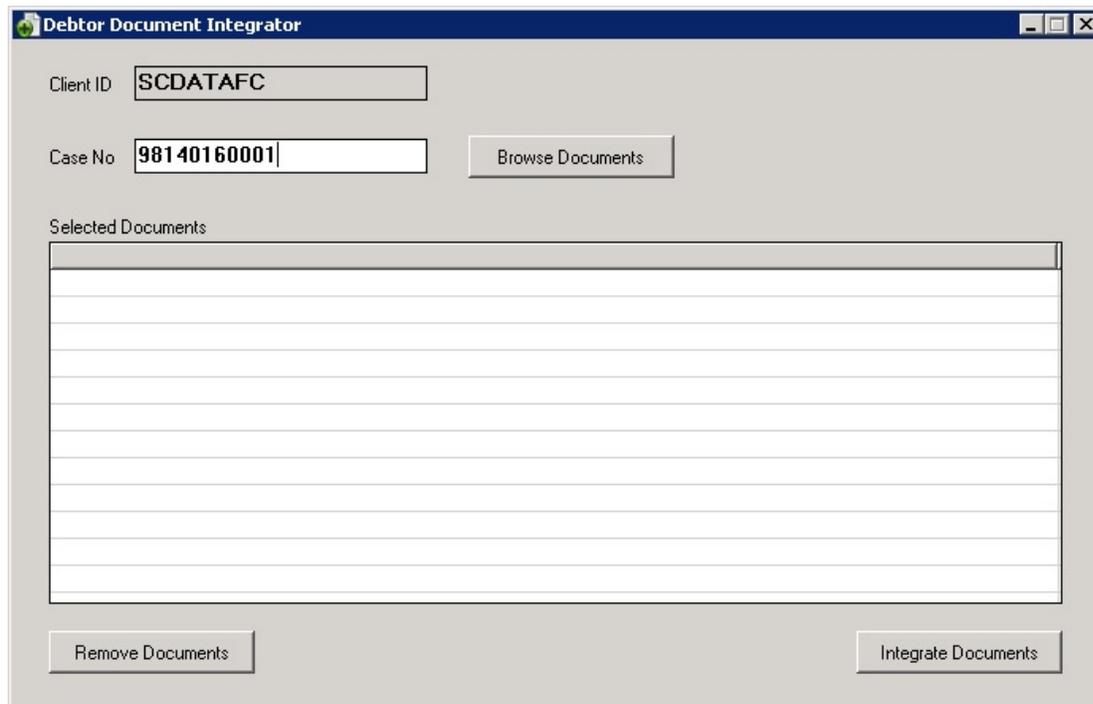

1. Enter the account number as shown below.

E.g. : Company and case number (98 and 140160001)

2. Click on 'Browse Documents' and locate the doc.

3. Integrate it by pressing the button 'Integrate Documents'.

The next release will include a feature to automatically process the scanned documents from a folder, based on the above naming convention.