Synergy Document Management™
Maximize Your Time and Minimize Your Clutter

Today’s paper-intensive business environment creates a fundamental need for a scalable document management system. The Synergy Document Management module of the Synergy Enterprise Content Management™ (ECM) solution provides a variety of efficient document capture solutions; immediate, accurate document search and retrieval; and a suite of competitively distinct productivity modules that arm you with the up-to-the minute information that you need to take care of business when it matters most – right now.
IT WORKS LIKE THIS ...
Synergy Document Management leverages state-of-the-art imaging and storage technology to provide an enterprise-wide electronic knowledge management solution. It integrates seamlessly into your bank’s infrastructure, providing a secure, central hub that supports virtually all types of electronic information, including reports, scanned images, PDFs, photos, sound files, and even application documents like Microsoft® Office Word and Excel® files.

Synergy Document Management captures documents in a centralized, decentralized, or combination environment and provides storage, versioning, metadata, security, retention policy enforcement, and indexing and retrieval capabilities via the Internet, LAN, or WAN.

QUICKER DECISIONS MEAN FASTER RESPONSE TIMES...
Synergy Document Management’s secure, central document repository allows you to access information quickly, improving enterprise-wide productivity and streamlining operations across every department. Synergy Document Management also offers the ability to open related information with a single mouse click using the WorldLinks feature. Connecting content with the people who need it supports better-informed and timelier business decisions, which can transform how effectively your bank can respond and the quality of customer service it can provide.

IT MANAGES CONTENT SO YOU DON’T HAVE TO ...
This solution’s sophisticated version management utility facilitates a collaborative work environment and enhances productivity by allowing users to check out document images and make content modifications such as notes and annotations. When checked in, modified document images automatically become the most current version available for enterprise-wide access.

SECURITY YOU CAN COUNT ON ...
Synergy Document Management’s proven security features help ensure that only authorized users can modify document images and that modifications can be automatically tracked, creating a valid audit trail. This solution enforces defined document retention policies that govern disposition and support compliance with related regulations, legal stipulations, and best practices, and streamlines preparation for regulatory examinations.

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CAPTURE MODULES
Synergy Document Management integrates with a variety of capture solutions that enable your bank to implement the most effective and efficient solution for your operating environment.

**Synergy Automated Document Recognition™ (ADR)** is a Windows®-based module that uses OCR/barcode technology to provide server-based automated classification and indexing of structured documents for Synergy’s capture modules based on template settings. Synergy ADR outperforms multiple copies of Synergy Batch/OCR without tying up workstations.

**Synergy Batch Document Recognition™ (BDR)** is a workstation-based solution that can automatically read and extract text and barcode index information from a batch of structured documents using template-based recognition, bringing new levels of speed and accuracy to the indexing process. Synergy BDR uses optical character recognition (OCR) technology to automatically read and extract index information from a batch of documents during the indexing process. Indexing templates are used to determine where Synergy’s capture modules should look on a physical page for specific indexing information.

**Synergy AutoImport™** enables users to automatically batch files into document directories. This Windows®-based module polls multiple network or local directories for new electronic documents including TIFFs, JPEGs, PDFs, XMLs, and Microsoft Office files and conveniently organizes them into groups based on bank-defined templates and parameters assigned to each directory. Users can schedule the batching of documents based on pre-defined time settings or they can specify “trigger” file types that prompt the batching process. Synergy AutoImport enhances the user experience and reduces the time needed to import files with its simple drag-and-drop functionality and convenient desktop access. This dynamic module is compatible with any TWAIN scanner, and enables the importing of files from multifunction devices, fax servers, and Twain devices across multiple branch locations.

Convert your paper documents into reusable electronic business information seamlessly with Synergy **Kofax Capture™**. Synergy Kofax Capture automates the advanced capture and recognition from documents and forms. This solution provides secure storage and effortless retrieval of stored information, while reducing operating costs and improving business processes. Synergy Kofax Capture boasts a highly-sensitive recognition feature that identifies text, numbers, icons, and other images examined in a document, and its high-end processing and extraction mechanisms offer best-of-breed form recognition and template processing of structured, semi-structured, or unstructured forms. This solution reduces manual intervention by automating the indexing/filing process. Coupled with Synergy’s storage capabilities, Synergy Kofax Capture assists banks with compliance of records management regulations, and this solution’s sophisticated search capabilities enable companies to simplify business processes by making documents easily accessible. Synergy Kofax Capture also offers sophisticated user tracking capabilities and the ability to generate turnkey reports.
**Synergy Kofax Transformation Modules™ (KTM)** is a suite of add-on applications for Kofax Capture that streamline the transformation of documents into structured electronic information, ready for delivery into business processes. It replaces manual, error-prone and expensive document sorting and data entry processes with automatic document classification, separation, and data extraction. Kofax KTM for invoices, in combination with Kofax Capture, provides accounts payable departments with the ability to capture paper or electronic invoices at a remote or central site, extract all the necessary information automatically, and match it to purchase order data. This enables automatic booking of invoices in the world’s leading ERP systems and image storage in Synergy ECM.

**Image and data conversion solutions from ProfitStars®**

**Enterprise Conversion Solutions** encompass extremely reliable and affordable image and data conversion solutions that enable banks to reduce the costs required to maintain legacy data archives or merger and acquisition data. This solution converts images and data from antiquated check images, document images, COLD, and signature card solutions to state-of-the-art and more cost-effective platforms. As an alternative, images and data can be maintained for ongoing research and printing.

**ECS Web** is a secure, outsourced storage solution for converted check image, document image, and COLD report data in a completely Web-based retrieval system. It offers online research and printing of legacy or acquisition data which is stored and hosted by ProfitStars in one low-cost online archive. ECS Web offers the most efficient, effective way to maintain legacy data and is less expensive than importing legacy data into banks’ go-forward, tier-one mainframe or core system. It helps banks meet compliance standards while offering simple and secure access to data in any format via the Web.

**SYNERGY ESIGN™**

Synergy eSign is a browser-based document presentment solution that leverages state-of-the art signature capture functionality. This module of Synergy, powered by Integrated Media Management (IMM), digitally captures legally binding signatures and permanently and securely embeds them into non-editable and auto-indexed PDF files, eliminating the time and resources required to scan, copy, and file paper documents. Synergy eSign enables bank customers to sign electronic documents and have their signatures securely digitized and embedded into documents, either locally or at the branch. This solution also supports multiple signatories at separate locations. This solution can be used in any business transaction that uses electronically captured documents and requires signatures, such as signature cards, loan applications, HR, and insurance enrollments. Its user-friendly functionality displays the signed documents on-screen, allows them to be printed and reviewed before final acceptance, and stores the indexed data into Jack Henry Banking’s Synergy Enterprise Content Management (ECM) solution. This efficient solution enables banks to further reduce operating expenses and the time typically required for online document availability from days to minutes while providing banks a “green” alternative to paper files and records.

The following sub-modules integrate with Synergy eSign:

**Synergy eSignWeb™** captures digital signatures via the Web and includes secure document delivery. This gives bank customers the ability to view and digitally sign documents securely on the Internet with a true PKI digital signature. Synergy eSignWeb offers banks the ability to expand their geographical reach and capture and retain more business. With Synergy eSignWeb, banks can quickly and confidently send lending, customer service, and trust documents privately, as well as other important information to customers, law offices, or business partners.

**With Synergy iSign™**, bank customers can review and sign documents from Synergy on their Apple iPads. After the documents are signed, they can be returned to Synergy or sent to the imaging system. The iPad component provides a search of all sessions and displays which documents have been signed and which documents need to be completed. Synergy eSign and iSign are accessed via Wi-Fi or 3G using the iPad Secure VPN connection to the IMM server. This iPad client application can be downloaded from the Apple Store at no charge.
ADD-ON MODULE
Integration with other Synergy modules provides a complete ECM solution. When combined with the following add-on modules, Synergy Document Management becomes a true productivity suite.

SYNERGY ID SCAN™
Synergy ID Scan automates the capture of ID card images and text, and provides easy data extraction and indexing capabilities. This easy-to-use modular application integrates Card Scanner Solutions’ (CSSN) idScan into Synergy. Using sheet-fed and flatbed scanners that are supported by the CSSN Scanshell interface, operators can scan a variety of personal cards such as driver’s licenses, identity cards, passports, medical cards, and green cards. Synergy ID Scan is available in both the desktop and browser (BAC) clients, and the scanners are USB and do not require additional external power to operate. This innovative solution provides a simple and intuitive scanning process, and its sophisticated archival capabilities help ensure that documents are easily retrievable.

The Synergy Enterprise Content Management (ECM) platform enables banks to securely capture, retrieve, store, and distribute documents, check images, and report data. This sophisticated solution supports virtually all types of electronic information, including reports, scanned images, PDFs, photos, sound files, application documents such as Microsoft Office Word and Excel, and essentially any electronic file that is in an industry standard format. The ability to create a secure, central document repository with immediate desktop delivery of archived documents improves enterprise-wide productivity and effectiveness, streamlines operations, supports better-informed and timelier decisions, and enhances customer service and responsiveness. Jack Henry Banking supports diverse operational environments with the ability to seamlessly install ECM functionality in-house, or deliver key components through its software-as-a-service (SaaS) Synergy Express offering.

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PRODUCTIVITY MODULES
Synergy Reports is compatible with the following productivity modules that can enhance the functionality of your Synergy ECM platform.

SYNERGY POWERSEARCH™
Synergy PowerSearch empowers users to search report data, scanned images, electronic documents, and check images using free form, natural language. This sophisticated module performs exact content searches or searches that locate document content containing the desired words, keywords, phrases, sentences, paragraphs, or variations without using Boolean operators, index values, or complex queries. Synergy PowerSearch is not limited to searching Synergy alone. This module searches documents and files located in accessible local or network directories outside of the Synergy system as well – a feature that is unmatched by competitive solutions.

SYNERGY DOCUMENT TRACKING™
The Synergy Document Tracking module fully automates the creation and management of electronic checklists. This solution enables users to create sophisticated electronic checklists using pre-set values, monitor and manage those checklists, and receive notifications when data is missing or incomplete. Synergy Document Tracking enhances service levels and convenience by organizing related documents in one location for easy retrieval, and this module provides extensible searching capabilities and maintains common searches, allowing for easy access to frequently used queries. This sophisticated component of the Synergy ECM platform enables banks to further streamline business processes, reduce operational risk, and comply with the related regulatory requirements by ensuring important documents are properly completed and digitally stored.
SYNERGY WORKFLOW MANAGEMENT™
Synergy Workflow Management simplifies enterprise-wide workflow by directly routing documents to appropriate decision makers and key personnel. It automates business processes, streamlines business practices, reduces operating expenses, and improves response times at the customer service level. Synergy Workflow Management adjusts to the business processes you are accustomed to, adapting the technology to your business rather than forcing your processes into a pre-defined mold. Creating new workflows is easy with a drag-and-drop interface that can mirror existing processes and speed automated workflow design.

SYNERGY EDISTRIBUTION™
Synergy eDistribution improves operating efficiency and productivity by automating the scheduling and electronic delivery of reports, documents, and notices internally and externally. This sophisticated solution leverages a fully automated scheduling system to support both one-time and recurring distributions. Electronic documents can be delivered as attached PDFs (optionally encrypted) or as e-mail notifications of document availability with a link to the bank’s Internet site. This solution also supports HTML-based e-mail content, providing enhanced presentation. Synergy eDistribution serves as a powerful communication channel for both employees and customers.
SYNERGY API INTEGRATION TOOLKIT™
The Synergy API Integration Toolkit is a flexible, easy-to-use productivity module that enables your bank to quickly access Synergy data and integrate that data with existing applications. This parameter-driven module leverages open architecture and industry-leading integration tools to enable existing key applications, such as teller platforms, Internet services, and third-party databases, to seamlessly access the reports, documents, and check images stored in Synergy. It enables banks to expand their Internet services by providing customers with online access to Synergy content including account statements, notices, and check images. This module empowers banks to control what content is available for Internet access, and operates independently of “click charges” for viewing customer data.

- Synergy Document Management’s secure, central document repository allows you to access information quickly, improving enterprise-wide productivity and streamlining operations across every department.

For more information about Synergy Document Management, to schedule a demonstration, or to talk to an existing user, contact us at askus@jackhenry.com.