



## Synergy Document Tracking™

### Customizable Electronic Document Tracking

*With an increasing number of documents being stored electronically, it is imperative that banks have an efficient, convenient, and compliant system not only to store these documents, but to organize, track, and retrieve them. Using electronic checklists, the Document Tracking module of the Synergy Enterprise Content Management (ECM) platform can track and manage virtually any electronic file that is in an industry standard format.*

## Are Your Electronic Documents Properly Completed and Digitally Stored?

### BUSINESS VALUE

- Save Money
- Improve Operations

### COMPATIBILITY

- SilverLake System®
- CIF 20/20®
- Core Director®
  
- *Synergy Document Tracking enhances ECM by providing banks the ability to securely store and immediately access important documents.*

### IT WORKS LIKE THIS ...

Synergy Document Tracking automates the creation and management of electronic document checklists. This module of the Synergy ECM platform enables banks to further streamline business processes, reduce operational risk, and comply with related regulatory requirements by helping to ensure that important documents are properly completed and digitally stored.

### CUSTOMIZABLE CHECKLISTS MAKE TRACKING SIMPLE ...

Synergy Document Tracking enhances ECM by providing banks with the ability to securely store and immediately access important documents.

Using customizable templates that can be tailored to each bank's specific needs, Synergy Document Tracking 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 using the Synergy eDistribution module.

### **TRACK YOUR DOCUMENTS EASILY AND EFFICIENTLY ...**

Synergy Document Tracking can enhance service levels and convenience by organizing related documents in one location for easy retrieval. Synergy's enhanced hitlist provides multiple users with a practical dashboard view, permitting immediate assessment of the status of individual documents and document groups. This module provides extensive searching capabilities and maintains common searches, allowing for easy access to frequently used queries.

Synergy Document Tracking supports a document level value rating to identify significant documents and assess operational risk. In addition, Synergy Document Tracking offers automated document indexing using printed barcode separator pages, and creates an audit trail of all checklist changes.

### **MORE BENEFITS WITH INTEGRATION ...**

Fully integrated with the Synergy eDistribution module, Synergy Document Tracking provides the ability to send notices when documents are missing or expired and generates checklist summary reports. The integrated Synergy Workflow module enables users to route reports, notifications, and document sets to key personnel for further processing or review, empowering the appropriate people with prompt decision-making capabilities.

**WHAT IT DOES:**

- Provides customizable templates to create individual document checklists based on specific needs.
- Utilizes electronic checklists to manage and track groups of documents.
- Organizes document groups in a user-friendly format with adjustable views.
- Enables users to send notices when documents are missing or expired with the Synergy eDistribution module.
- Enables users to electronically distribute reports and notifications to key personnel with the Synergy Workflow module.
- Provides dashboard views of checklist statuses.
- Provides extensive searching capabilities and maintains frequently used queries for ongoing use.
- Supports document level value rating to identify significant documents.
- Supports custom defined document status to handle varying document tracking requirements.
- Supports custom defined data fields for tracking additional document information.
- Provides document level exception tracking.
- Supplies a complete audit trail of all checklist changes.

**WHAT IT DOES FOR YOU:**

- Enables banks to further streamline business processes.
- Reduces inherent operational risk.
- Helps ensure compliance with related regulatory requirements.
- Enhances service levels and convenience by organizing related documents in one location for easy retrieval.
- Streamlines information access through a convenient dashboard view, empowering users with prompt decision-making capabilities.

*The Synergy Enterprise Content Management (ECM) platform enables banks to securely capture, retrieve, store, and distribute electronic 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.*

For more information about Jack Henry Banking®, or to schedule a demonstration or talk to an existing user, email [askus@jackhenry.com](mailto:askus@jackhenry.com), call 417-235-6652, or visit [www.jackhenrybanking.com](http://www.jackhenrybanking.com).