



Synergy Automated Document Recognition™ (ADR) and Synergy Batch Document Recognition™ (BDR)

Document Classification and Indexing

Better document management is easy with ADR and BDR. These innovative modules of Jack Henry Banking's Synergy Enterprise Content Management™ (ECM) suite automates the indexing process, enabling your bank to save time and improve accuracy.

Improve Indexing Efficiencies in Synergy

BUSINESS VALUE

- Save Money
- Improve Operations
- Reduce Risk

COMPATIBILITY

- SilverLake System®
- CIF 20/20®
- Core Director®
- *These solutions clean documents and automatically reads and extracts text and barcode index information from a batch of structured documents using template-based recognition.*

IT WORKS LIKE THIS ...

Synergy ADR and Synergy BDR bring new levels of speed and accuracy to the indexing process. This solution cleans documents and automatically reads and extracts text and barcode index information from a batch of structured documents using template-based recognition.

Synergy ADR and Synergy BDR support deskew, despeckle, and black border removal document cleaning options. It also supports optical character recognition (OCR) technology that automatically reads and extracts index information from a batch of documents during the indexing process. Indexing templates are used to determine where these solutions should look on a physical page for specific indexing information.

BATCH DOCUMENT RECOGNITION (BDR)

The Synergy BDR module includes OCR/Barcode recognition and Document Info Pages features, explained below.

A batch template is configured within Synergy Capture, which indicates the processes that batches will follow and can specify which indexing templates are to be used with the batch if OCR/Barcode is one of the specified processes.

During indexing template configuration, end users utilize their mouse cursor to mark specific zones on a sample document page. Form IDs are also configured and the location of the ID on the physical page is marked. When the indexing template is fully configured and used for OCR or barcode indexing, Synergy BDR searches the marked zones from the indexing template and reads the information within those zones. BDR automatically extracts printed data from forms which can be utilized for indexing purposes. The information is placed into the corresponding Synergy index value fields, and the remaining fields can be automatically populated using the Synergy Smart Indexing feature.

AUTOMATED DOCUMENT RECOGNITION (ADR)

The Synergy ADR module will automatically use OCR/barcode technology to provide server-based automated classification and indexing of structured documents for Synergy Capture, based on Synergy Capture template settings. It also includes Document Info Pages.

Synergy ADR outperforms multiple copies of Synergy BDR without tying up workstations, and it is available for in-house and Synergy Express customers.

DOCUMENT INFO PAGES

Synergy's Document Info Pages are separately created and printed pages inserted into a batch prior to scanning in either BDR or ADR. The Document Info Page includes multiple barcodes used to communicate index values when read by BDR or ADR. Document Info Pages also act as separator pages, eliminating the need to insert blank pages into the batch.

When BDR or ADR processing has been initiated, the Document Info Page will be read and used to index the documents following it. All documents following the Document Info Page will be indexed using the information provided on the Document Info Page itself. This indexing process will continue until a new Document Info Page is read or the process ends.

CONVENIENT, ACCURATE INDEXING AND COST SAVINGS FOR YOUR BANK

When used as part of the Synergy document management process, Synergy BDR and Synergy ADR are innovative enterprise content management solutions that provide banks with a well-organized alternative to paper files and records.

ADDITIONAL CAPTURE MODULES ...

The Synergy ECM suite's capture modules include Synergy ADR, Synergy BDR, and the following additional modules that enable your bank to implement the most effective and efficient document capture platform for your unique environment.

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.

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.

WHAT IT DOES:

- Works alongside Synergy Capture to further simplify the process of automated document indexing.
- Provides Batch Document Cleaning and Automated Background Document Cleaning to prepare the document for accurate recognition processing
- Provides Zonal Optical Character Recognition (OCR) – recognizes machine print text in pre-defined regions on the image for automatic indexing.
- Offers Barcode Recognition – recognizes values of barcodes printed on scanned pages for automatic indexing.
- Allows for Manual Indexing with On-screen OCR. Provides Rubber Band recognition of selected typewritten text (OCR) or barcodes.
- Allows for automated indexing with On-screen OCR using an indexing template.
- Provides Synergy Document Info Pages, providing distinct separators, helping eliminate the need to insert blank pages into the batch.
- Integrates with optional Synergy Batch Document Recognition (BDR) or Synergy Automated Document Recognition (ADR) modules.

WHAT IT DOES FOR YOU:

- Offers banks the ability to automate the indexing process and streamline processes even further, enhancing the abilities of Synergy Capture and adding additional convenience to an existing Synergy ECM System.
- Automates and reduces data entry labor and errors with automatic recognition of information to be used to index the document.
- Uses barcodes to automate the capture of information used to index and recognize the documents scanned.
- In conjunction with Document Info Pages, provides an efficient way to separate and capture index values for a packet of structured or unstructured documents.
- Reduces ongoing labor costs.
- Boosts enterprise-wide productivity.

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.