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Synergy Enterprise Content Management™

Effectively Manage Documents, Reports, and More Organization-Wide

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Effectively manage your content throughout the entire enterprise.

In the current market, organizations need to work smarter and optimize resources wherever possible. The Synergy Enterprise Content Management (ECM) solution from Jack Henry℠ integrates with your technology platform and business processes to manage content for your organization. It delivers the flexibility you need to enhance business agility and efficiency. Jack Henry offers in-house and hosted options to manage your enterprise content to meet your organizations needs and preference.

The flexibility to handle it all …

Regardless of system origin, format, or layout, Synergy supports all forms of content including enterprise report management, check images, signature cards, loan files, account agreements, emails, traditional correspondence, word processing documents, spreadsheets, photos, and web pages.

The content of stored documents can be searched with free-form, natural language searches rather than complicated indexes and inconclusive keywords. Synergy ECM provides content tracking and monitoring capabilities, enabling organizations to identify process issues and modify the system to improve efficiency. This system also offers reliable and accurate audit tracking.

Secure the integrity of your documentation …

Synergy ECM helps ensure data integrity and security by providing access to only the document images, not the originals. This solution also enforces internal data security and integrity rules, supports compliance with the ID storage and list-checking provisions of the USA Patriot Act, and the data security provisions of the Gramm-Leach-Bliley Act.

Integration and conversions made easy …

Synergy ECM seamlessly integrates with a wide variety of core operating systems and other complementary products. Its ability to store and retrieve documents generated by the various information processing solutions of acquired institutions also decreases data conversion costs substantially. Intuitive Windows®-based operation minimizes the need for training, administration, and technical support.

A complete ECM solution

The Synergy ECM platform enables institutions to securely capture, store, manage content, share content, and enforce retention policies. This sophisticated solution supports virtually all types of content, including reports, scanned images, PDFs, photos, sound files, application documents such as Microsoft® Word and Excel®, and essentially any electronic file 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 or member service.

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Key Benefits:

- Leverages integrated solutions that enable organizations to securely capture, archive, retrieve, and distribute report data, electronic documents, and check images, and provides retention policy enforcement.

- Supports all forms of document content regardless of system origin, format, or layout.

- Enables users to search the content of stored documents using free-form, natural language searches rather than complicated indexes and inconclusive keywords.

- Supports compliance with the regulatory requirements of the USA Patriot Act, the Gramm-Leach-Bliley Act, and the California Consumer Privacy Act (CCPA) using Jack Henry's Enterprise Data Privacy and Protection Project.

- Seamlessly integrates with a variety of core operating systems and an array of complementary products.

- Offers an intuitive Windows-based operating environment.

- Simplifies content management across the entire enterprise.

- Reduces paper handling, error-prone manual processes, and the potential for lost documents.

- Helps ensure data integrity and security by providing access to only the document images.

- Eliminates the need for physical storage of paper documents.

- Improves enterprise-wide productivity and effectiveness through the streamlining of content management operations.

- Supports better informed and timelier decisions.

- Provides improved tracking and monitoring capabilities, enabling institutions to identify process issues and modify the system to improve efficiency.

- Provides reliable and accurate audit trails.

- Enhances customer and member service and responsiveness.

- Enables organizations to maximize technology benefits with minimal training, ongoing administration, and technical support.

With this state-of-the-art ECM solution, you can revolutionize document management and further automate your business processes.

Synergy Express™ – Hosted Software-as-a-Service ECM Solution Suite

Synergy Express incorporates key functions of the Synergy ECM platform to provide hosted enterprise-wide content management, including document, reports, and check archive. This fully managed, cloud-based platform eliminates the capital expenditures of in-house system installations, ongoing operations, and maintenance.

Synergy Express provides security, regulatory compliance, and guarantees system uptime. It also performs all back-office activities such as daily back-ups and software and hardware upgrades and supports planned or unplanned data storage volume increases. The content of stored documents can be searched with free-form, natural language searches rather than complicated indexes and inconclusive keywords. Synergy ECM provides improved tracking and monitoring capabilities, enabling organizations to identify process issues and modify the system to improve efficiency. This system also offers reliable and accurate audit tracking.

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Key Benefits:

- Provides a comprehensive, fully managed outsourced enterprise content management solution.

- Offers guaranteed system uptime.

- Provides state-of-the-art security.

- Helps with regulatory compliance.

- Provides business continuity during temporary interruptions or catastrophic disasters.

- Streamlines and simplifies the entire enterprise-wide content management process.

- Significantly reduces the capital expenditures, operations, and maintenance for in-house ECM systems.

- Enables rapid full implementation with minimal staff involvement.

- Eliminates ongoing capacity planning by supporting planned and unexpected data storage volume increases.

- Provides ongoing access to Jack Henry's imaging, technology, and security experts.

THE SYNERGY ECM PLATFORM INCLUDES:

Enterprise-Wide Document Management

Imaging and storage technology that integrates with your infrastructure, providing a secure, central hub that supports reports, scanned images, PDFs, photos, sound files, and documents like Microsoft Word and Excel. Synergy can capture documents in a centralized, decentralized, or combination environment and provide storage, versioning, metadata, security, retention policy enforcement, indexing, and retrieval capabilities.

Fully Automated Report Capture and Retrieval

Enterprise Report Management (ERM) technology to automate the capture and archive of report data while creating a warehouse of all archived reports, statements, and notices. Users can retrieve content using a single point of entry. Its built-in security system allows access to authorized personnel and provides access to report data with all original report data remaining intact and unchanged. Synergy also accepts output from most business applications and legacy mainframe systems.

Archives Check Images and Related Documents

Optimizes the cost savings and operational efficiencies of check imaging by storing the images in a central and easily accessible location. Multiple users can retrieve archived checks and deposit slips and view the front and back of each using features like rotate, pan, and zoom. Multiple checks can be viewed simultaneously and notations, such as exception item dispositions, can be added to the images. Synergy provides the ability to print up to 32 images per page, and check images can be cut and pasted into other applications such as Microsoft Word or Excel.

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Open Integration

Open architecture and industry-leading integration tools enable existing applications, such as teller platforms, internet services, and third-party databases, to easily access the reports, documents, and check images stored in Synergy. This parameter-driven module enables banks and credit unions to give accountholders online access to Synergy content. The feature-rich Synergy API Integration Toolkit lets you control which content is available for internet access and operates independently of "click charges" for viewing customer or member data.

Automated File Batching

Provides for automatic batching of files into document directories. Synergy polls network or local directories for new documents (TIFF, JPEG, PDF, XML, and Microsoft Office files), and organizes them based on defined templates and parameters assigned to each directory. Users can schedule the document batching based on predefined time settings or specify trigger file types that prompt the batching. Drag-and-drop functions and desktop access simplify operations. It enables file imports from multifunction devices, fax servers, and TWAIN devices across branch locations.

Archive Microsoft® Outlook® files in Synergy

Enables automatic or selective archiving of emails and attachments from within Microsoft Outlook. This information can be archived using intelligent categorization for retrieval.

Automated ID Card Scanning

Captures, indexes, and archives a variety of personal ID cards such as driver's licenses, passports, and medical cards. The scanned information can be cross-referenced with related scanned items, enhancing content storage and retrieval capabilities. Synergy helps automate workflow, saves time, and reduces the errors generated in manual processing.

Data Analysis

Leverages the industry's leading database management applications to revolutionize the way you extract and import ERM report data. The dynamic Synergy solution enables you to customize templates to retrieve information based on your needs and take advantage of automated extraction to quickly get data as new documents are loaded. Whether you need a few lines of a single page or hundreds of pages of multiple reports, this module streamlines data retrieval and imports it into the latest data mining solutions.

SYNERGY COMPLEMENTARY PRODUCTS:

Synergy Productivity – Customize Tracking and Distribution

Synergy Document Tracking™ – Customizable Electronic Document Tracking

Automates the creation and management of checklists. It streamlines business processes, reduces risk, and enhances regulatory compliance by helping to properly complete and digitally store documents. Using customizable templates, you create checklists using pre-set values, monitor and manage those checklists, and receive notifications when data is missing or incomplete. It organizes related documents in one location for easy retrieval.

Synergy eDistribution™ – Electronic Content Distribution

Automates the scheduling and electronic delivery of documents, such as statements, notices, reports, and promotional material. This module provides two delivery alternatives and supports both one-time and recurring distributions. It works with Synergy Document Tracking to distribute coming due and past due notices, as well as document tracking reports.

Synergy AdvancedPDF™ – Fast and Accurate OCR Processing

Enables you to store your records as accurate, searchable, OCR-generated PDFs. It combines image processing, near-real-time OCR, advanced compression, Bates stamping, web-optimization, and batch multithreading all in one step. Uses cutting-edge technology from CVISION Technologies, Inc.

Synergy Automated Document Recognition™ – Fast and Accurate Indexing

Offers server-based document classification/indexing, which provide speedy and accurate indexing. It cleans documents (de-skew, de-speckle, and black border removal) and automatically reads and extracts text and barcode index information using template-based recognition.

It also supports bar code technology using OCR that automatically reads and extracts index information from a batch of documents. Indexing templates determine where to look on a physical page for specific indexing information.

Synergy eSign™ Bundle – Document Presentment and Signature Capture

Provides document signing directly from an Apple® iPad® or Microsoft® Windows® tablet device. Powered by IMM, it offers greater mobility to employees and document signers, and add the convenience by displaying the document directly to accountholders rather than turning desktop monitors around for review. You can lower costs by eliminating document printing and signature pads. You can also take the tablet to the accountholder, so the signer doesn't need to be present at the institution.

Synergy eSignWeb™ – Web-based Signature Capture

Captures signatures via the web and includes secure document delivery. Enables accountholders to view and sign documents securely and institutions to expand their geographical reach and capture and retain more business. You can quickly and confidently send lending, customer service, and trust documents to accountholders, law offices, business partners, and more.

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Synergy Invoice Capture – Automated Invoice Processing

Provides a cloud-hosted invoice capture solution automating the storage of invoices into Synergy ECM using Ephesoft Semantik. Synergy Invoice Capture offers best-in-class artificial intelligence utilizing thousands of invoice data points to improve efficiency and quality while reducing the expense and time associated with capturing, indexing, and processing invoices. Integration with *jha*Enterprise Workflow™ automates approvals and updates invoice records within your accounting system.

Synergy PowerSearch™ – Natural Language Search and Retrieval

Performs exact content searches or natural language searches that locate document content containing the desired words, keywords, phrases, sentences, paragraphs, or variations. It doesn't require Boolean operators, index values, or complex queries. It also searches in accessible local or network directories outside of the Synergy system.

*jha*Enterprise Workflow™ – Enterprise-Wide Business Process Management Solution

Automates business processes that include manual and automatic steps. It generates material operating efficiencies, reduces operating costs and operational risks. It integrates with Synergy ECM and enables the sharing of documents and document content across the enterprise.

Synergy Integration Compatibility with Jack Henry and Other Relevant Products:

- Synapsys®
- LoanVantage®
- ImageCenter™
- Opening Act™
- Wycom® check storage
- Yellow Hammer EFT Fraud Detective™
- Banno Digital Platform™
- Branch Anywhere™
- Xperience™
- *jha*Enterprise Workflow™

The Synergy ECM solution from Jack Henry integrates with your technology platform and business processes to manage documents, reports, and check images.

For more information about Synergy ECM, contact us here.

For more information about ProfitStars®, email **sales@profitstars.com**, call **877-827-7101**, or visit **www.profitstars.com**.

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