Synergy Document Management™
Maximize Your Time and Minimize Your Clutter
Would you like to reduce paper management and put needed information at your fingertips?

**BUSINESS VALUE**

- Improve Operations
- Enhance Service

**COMPATIBILITY**

- Episys®

Today’s paper-intensive business environment creates a need for a scalable document management system. The Synergy Document Management module of Synergy Enterprise Content Management™ (ECM) provides 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.

**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 Episys, providing a secure, central hub that supports virtually all types of electronic information, including reports, scanned images, PDFs, photos, sound files, and application documents such as Microsoft® Office Word and Excel® files. This product 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 enables you to access information in near real time, improving enterprise-wide productivity and streamlining operations across every department. It also offers the ability to open related information with a single mouse click. Connecting content with the people who need it supports better-informed and timelier business decisions. This transforms how effectively your credit union responds and the quality of member service it provides.
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**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 enabling 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. It enforces document retention policies that support regulatory compliance.
CAPTURE MODULES
Synergy Document Management integrates with a variety of effective and efficient capture solutions.

**Synergy Automated Document Recognition™ (ADR)** is a Windows®-based module that uses optical character recognition (OCR) and barcode technology. It provides server-based automated classification and indexing of structured documents for Synergy's capture modules based on template settings.

**Synergy Batch Document Recognition™ (BDR)** is a workstation-based solution that automatically reads and extracts text and barcode index information from a batch of structured documents using template-based recognition. This brings new levels of speed and accuracy to 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, JPGs, PDFs, XMLs, and Microsoft Office files and conveniently organizes them into groups based on credit union 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.

**Synergy Kofax Capture™** converts your paper documents into reusable electronic business information. 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 images. 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 with records management compliance, and its search capabilities simplify business processes by making documents easily accessible. It 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, gives accounts payable departments 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 in Synergy ECM’s image storage repository.

**Synergy ID Scan™** automates the capture of ID card images and text, and provides easy data extraction and indexing capabilities. This modular application integrates Card Scanning Solutions’ (CSSN) idScan® into Synergy. Using sheet-fed and flatbed scanners that are supported by the CSSN Scanshell® interface, operators can scan 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) client. The scanners are USB-powered, so no external power source is needed. Its sophisticated archiving capabilities make documents easily retrievable.

**Synergy eSign™** is a browser-based document presentment solution that uses state-of-the art signature capture technology. 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. eSign 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, 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 Synergy ECM. This enables credit unions to reduce both operating expenses and the time required for online document availability.
The following sub-modules integrate with Synergy eSign:

**Synergy eSignWeb™** captures digital signatures via the Web and includes secure document delivery. This gives credit union members the ability to view and digitally sign documents securely on the Internet with a true PKI (public-key infrastructure) digital signature. Synergy eSignWeb offers credit unions the ability to expand their geographical reach and capture and retain more business. With Synergy eSignWeb, you can quickly and confidently send lending, member service, and trust documents to members, law offices, or business partners.

**With Synergy iSign™**, credit union members can review and sign documents from Synergy on an Apple® iPad®. 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.

**IMAGE AND DATA CONVERSION SOLUTIONS FROM PROFITSTARS®**

Enterprise Conversion Solutions encompass extremely reliable and affordable image and data conversion solutions that enable credit unions 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, Enterprise Report Management (ERM), 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 ERM 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 credit unions’ go-forward, tier-one mainframe or core system. It helps meet compliance standards while offering simple and secure access to data in any format via the Web.
PRODUCTIVITY MODULES

Synergy Document Management is also compatible with the following modules that can enhance the power of your Synergy ECM platform.

**Synergy Document Tracking™** is a module that 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. This module provides extensible searching capabilities and maintains common searches, allowing for easy access to frequently used queries. This enables credit unions to further streamline business processes, reduce operational risk, and comply with the related regulations.

**Synergy PowerSearch™** lets you find exactly what you are looking for. It enables 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 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 our competitor's solutions.

**Synergy Workflow Management™** relieves the burden of managing detailed workflow tasks. This module simplifies enterprise-wide workflow by directly routing documents to appropriate decision makers and key personnel. It automates and streamlines business practices, reduces operating expenses, and improves response times at the member-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™** improves operating efficiency and productivity by automating the scheduling and electronic delivery of reports, documents, and notices internally and externally. This sophisticated solution uses 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 your Internet site. This solution also supports HTML-based email, providing enhanced presentation. Synergy eDistribution serves as a powerful communication channel for both employees and members.

**Synergy API Integration Toolkit™** makes your content easily accessible. This is a flexible, easy-to-use productivity module that enables you 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 allows credit unions to expand Internet services by giving members online access to Synergy content such as account statements, notices, and check images. This module empowers you to control what content is available for Internet access, and it operates independently of "click charges" for viewing member data.
The Synergy Enterprise Content Management™ (ECM) platform enables credit unions 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 member service and responsiveness. Symitar 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.