



Synergy Enterprise Content Management™

Modular ECM Solution



Do you want to effectively manage your content throughout your entire enterprise?

BUSINESS VALUE

- Improve Operations
- Enhance Service

COMPATIBILITY

- Episys®

In the current market, organizations need to think faster, work smarter, and optimize their resources wherever possible. Today's modular Synergy Enterprise Content Management solution from Symitar® integrates with your technology platform and business processes to manage documents, reports, and check images. It delivers the flexibility you need to enhance business agility and efficiency.

Synergy Enterprise Content Management™ (ECM) – Modular ECM Suite

The Synergy ECM platform enables credit unions to securely capture, store, retrieve, 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® 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 member service.

Synergy Express™ – Modular ECM SaaS Solution

Synergy Express incorporates key functions of the Synergy ECM platform to provide outsourced enterprise-wide content management, including document, reports, and check archive. This fully-managed service eliminates the significant capital expenditures required for in-house system installations as well as ongoing operation and maintenance costs. Synergy Express streamlines the entire content management process, provides state-of-the-art security, ensures compliance with all related regulatory requirements, offers guaranteed system uptime, and provides ongoing access to Symitar's imaging, technology, and security experts. Symitar performs all back-office activities such as daily back-ups and software and hardware upgrades, in addition to incorporating new imaging and storage technologies when they are proven, appropriate, and practical.

THE FLEXIBILITY TO HANDLE IT ALL ...

Regardless of system origin, format, or layout, Synergy supports all forms of content including enterprise report management (ERM), check images, signature cards, loan files, deposit 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 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.

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 disparate information processing solutions of acquired credit unions also decreases data conversion costs substantially. Intuitive Windows®-based operation minimizes the need for training, administration, and technical support.

SYNERGY BASE MODULES

Synergy Document Management™ – Enterprise-Wide Document Management

This module's advanced imaging and storage technology provides enterprise-wide knowledge management. It integrates with your 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 Word and Excel. Synergy Document Management can capture documents in a centralized, decentralized, or combination environment and provide storage, versioning, metadata, security, retention policy enforcement, and indexing and retrieval capabilities via the Internet, LAN, or WAN.

Synergy Reports™ – Fully Automated Report Capture and Retrieval

Synergy Reports leverages ERM technology to fully automate capture, archival, and retrieval functions while creating a centralized warehouse of all archived reports, statements, and notices. Users can administer, manage, and retrieve content using a single point of entry, which protects the security of documents and saves time. Synergy Reports' built-in security system allows quick report access to authorized personnel via the Internet, LAN, or WAN. The module also helps ensure data security and integrity by providing access to report data with all original report data remaining intact and unchanged. It also accepts output from Symitar's core processing solutions, most business applications, and legacy mainframe systems.

Synergy Check Archive™ – Archives Check Images and Related Documents

Synergy Check Archive 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. This solution 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.

This state-of-the-art ECM solution has enabled credit unions to revolutionize document management and further automate their business processes.

CAPTURE MODULES

Synergy AdvancedPDF™ – Fast and Accurate OCR Processing

Synergy AdvancedPDF enables you to store your records and important documents as compact, easy-to-read PDFs. Symitar, in partnership with CVISION Technologies, Inc., is offering the technology to make very accurate, searchable OCR-generated PDFs that look just like the original documents. This solution combines image processing, near-real-time OCR, advanced compression, Bates stamping, web-optimization, batch multi-threading, and encryption all in one step.

Synergy AutoImport™ – Automated File Batching

Synergy AutoImport enables users to automatically batch files into document directories. This Windows-based module polls network or local directories for new electronic documents including TIFF, JPEG, PDF, XML, 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 predefined 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 enables the importing of files from multifunction devices, fax servers, and TWAIN devices across branch locations.

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

Synergy Document Recognition makes better document management easy with ADR, server-based document classification/indexing, and BDR, workstation-based document classification/indexing. These applications bring new levels of speed and accuracy to the indexing process. They clean documents, and automatically read and extract text and barcode index information from a batch of structured documents using template-based recognition. ADR and BDR support de-skew, de-speckle, and black border removal document cleaning options. They also support bar code technology using optical character recognition (OCR) 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. When used as part of the Synergy document management process, this module provides a well-organized alternative to paper files and records.

Synergy eMailAssist™ – Archive Microsoft® Outlook® files in Synergy

Synergy eMailAssist enables automatic or selective archiving of emails and attachments from within Microsoft Outlook to the Synergy Document Management™ module. This increased efficiency reduces staff record-keeping time and keeps critical information from slipping through the cracks. Due to its compatibility with Synergy SmartIndex, saved material is intelligently categorized for retrieval.

Synergy eSign™ – Document Presentment and Signature Capture

This browser-based document presentment solution uses state-of-the-art signature capture technology. This module of Synergy, powered by Integrated Media Management (IMM), digitally captures signatures and permanently and securely embeds them into non-editable and auto-indexed PDF files. This eliminates the time and resources required to scan, copy, and file paper documents. The solution also supports multiple signatories at separate locations. It can be used in any business transaction that requires electronically captured documents and signatures, such as signature cards, loan applications, HR, and insurance enrollments.

Synergy iSign™ – Apple® iPad® Signature Capture

With Synergy iSign, credit unions can add to the convenience of Synergy eSign electronic signing by enabling signatures directly from an iPad. This allows credit unions to take the electronic signing process to the member, instead of requiring the signer to be present at the credit union.

Synergy eSignWeb™ – Web-based Signature Capture

Synergy eSignWeb captures e-signatures via the web and includes secure document delivery. This gives a credit union's members the ability to view and sign documents securely on the Internet with a true PKI (public-key infrastructure) signature. You can quickly and confidently send lending, member service, and trust documents to members, law offices, or business partners.

Synergy eStorage™ – Interface to a Third-Party Electronic Vault

Synergy eStorage is a sub-module of Synergy eSignWeb that transfers electronically signed documents to a third-party vault where the original "authoritative copy" can be stored and properly controlled. Watermarked copies of the documents are subsequently archived to the Synergy Document Management module. Synergy eStorage gives organizations the ability to secure originals of electronically signed documents in a third-party authoritative controlled environment, while maintaining a copy of the documents in Synergy Document Management where they can be viewed and printed.

Synergy ID Scan™ – Automated Card Scanning

Synergy ID Scan accurately captures, indexes, and archives a variety of personal identity cards including driver's licenses, passports, and medical cards. The contextual information retrieved from the initial scan can be cross-referenced with related scanned items, enhancing content storage and retrieval capabilities. This module simplifies business processes, automates workflow, and reduces the errors generated in manual processing. It eliminates time wasted on manual data entry and helps ensure that member profiles are accurate at the point of entry.

Synergy Kofax Capture™ – Automated Information Capture From Documents and Forms

Kofax is a leading provider of document capture application software that enables documents to be converted into reusable electronic business information. Its capabilities are integrated with Synergy to further automate the time-consuming, error-prone manual document scanning process. Kofax Capture automatically scans, recognizes, and validates data and files it within Synergy, where it is securely stored and easily retrieved.

Synergy Kofax Transformation Modules (KTM) – Document Transformation Into Structured Electronic Information

Synergy KTM is a suite of add-on applications for Kofax Capture that streamlines 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 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 various sites, extract the necessary information automatically, and match it to purchase order data. This enables automatic booking of invoices in the leading enterprise resource planning (ERP) systems and image storage in Synergy ECM.

PRODUCTIVITY MODULES

Synergy API Integration Toolkit™ – Internet-Based Integration

This module uses open architecture and industry-leading integration tools to 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 credit unions to give members 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 member data.

Synergy DataMart™ – Data Analysis

Synergy DataMart leverages the industry's leading database management applications to revolutionize the way you extract and import ERM report data. This dynamic 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 Document Tracking™ – Customizable Electronic Document Tracking

This module automates the creation and management of electronic checklists. It can streamline business processes, reduce risk, and enhance regulatory compliance by helping to ensure that important documents are properly completed and digitally stored. Using customizable templates, Synergy Document Tracking enables users to create sophisticated checklists using pre-set values, monitor and manage those checklists, and receive notifications when data is missing or incomplete. It also organizes related documents in one location for easy retrieval.

Synergy eDistribution™ – Electronic Content Distribution

Synergy eDistribution automates the scheduling and electronic delivery of documents, including statements, notices, reports, and even promotional material. This module provides two delivery alternatives and supports both one-time and recurring distributions. Synergy eDistribution works in conjunction with Synergy Document Tracking to distribute coming due and past due notices, as well as document tracking reports. The solution can also be used as a cost-effective promotional channel that converts traditional statement stuffers into electronic product/service promotions.

Synergy PowerSearch™ – Natural Language Search and Retrieval

This module 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. This solution also searches documents and files located in accessible local or network directories outside of the Synergy system. Synergy PowerSearch enhances member service and responsiveness by reducing the time required to conduct ongoing research.

jhaEnterprise Workflow™ – Enterprise-Wide Business Process Management Solution

jhaEnterprise Workflow is built for credit unions looking to automate business processes that include manual and automatic steps. It generates material operating efficiencies, reduces operating costs, and reduces operational risks. *jhaEnterprise Workflow* has tight integration with Synergy ECM and part of that integration is the ability to share documents and document content across the entire enterprise.

Today's modular Synergy ECM solution from Symitar[®] integrates with your technology platform and business processes to manage documents, reports, and check images.

Synergy ECM Modules	Synergy Document Management	Synergy Check Archive	Synergy Reports	Synergy Express
Capture Modules				
Synergy AutoImport™ – Automated file batching	x			x
Synergy Document Recognition™ – Automated document indexing	x			x
Synergy eMailAssist™ – Archive Microsoft® Outlook® files in Synergy	x			x
Synergy eSign™ – Document presentment and signature capture	x			x
Synergy eSignWeb™ – Web-based signature capture	x			x
Synergy ID Scan™ – Automated card scanning	x			x
Synergy Kofax Capture™ – Automated information capture from documents and forms	x			
Synergy Kofax Transformation Modules (KTM) – Document transformation into structured electronic information	x			
Synergy AdvancedPDF™ – Fast and Accurate OCR Processing	x			x
Productivity Modules				
Synergy API Integration Toolkit™ – Internet-based integration	x	x	x	
Synergy DataMart™ – Data analysis			x	
Synergy Document Tracking™ – Customizable electronic document tracking	x			x
Synergy eDistribution™ – Electronic content distribution	x		x	x
Synergy PowerSearch™ – Natural language search and retrieval	x	x	x	x
jhaEnterprise Workflow™ – Business process automation	x		x	x

Intuitive Windows®-based operation minimizes the need for training, administration, and technical support.

WHAT IT DOES:

- ▶ Leverages integrated modules that enable organizations to securely capture, archive, retrieve, and distribute report data, electronic documents, and check images.
- ▶ 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 and the Gramm-Leach-Bliley Act.
- ▶ Seamlessly integrates with a variety of core operating systems and an array of complementary products.
- ▶ Offers an intuitive Windows-based operating environment.

WHAT IT DOES FOR ME:

- ▶ 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 credit unions to identify process issues and modify the system to improve efficiency.
- ▶ Provides reliable and accurate audit trails.
- ▶ Enhances member service and responsiveness.
- ▶ Enables organizations to maximize technology benefits with minimal training, ongoing administration, and technical support.

For more information about Synergy ECM, ask your account executive or email us at askus@symitar.com.