



## Synergy Express™

Outsourced Enterprise Content  
Management Solution



## Outsourced Enterprise Content Management Solution

As new and improved technologies continue to reshape the financial services industry, credit unions need to be able to work smarter and respond to members quicker. Synergy Express is an outsourced enterprise content management solution that can help you automate your business processes and streamline your document management system, putting the information you need at your fingertips.

Synergy Express incorporates key functions of the Synergy Enterprise Content Management™ (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 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.

This comprehensive, cost-effective solution leverages three base modules to eliminate the vast majority of client hardware requirements, typically only requiring workstations with document scanners to capture and index document images which archives to the primary Synergy Express data center. In addition to dramatically reducing initial and long-term hardware expenses, Synergy Express also eliminates ongoing capacity planning by seamlessly supporting planned and unexpected data storage volume increases. Synergy Express can be fully implemented in a fraction of the time required to install in-house hardware and software solutions, and the inherent ease-of-implementation requires minimal involvement by the staff.

Synergy Express' outsourced delivery model reduces the need to recruit, hire, and train the staff required to administer and maintain an in-house content management solution. Outsourcing this mission-critical business function also enables existing staff to focus on business and customer care without relinquishing operational control. And because Synergy Express is Windows®-based, the need for training, technical support, and administration is minimized.

Symitar performs all ongoing system maintenance and administration, all back-office activities such as daily back-ups, and all ongoing software and hardware upgrades. New imaging and storage technologies are integrated when they are proven, appropriate, and practical. In addition to streamlining and simplifying the entire content management process, Synergy Express provides state-of-the-art security and ensures compliance with all related regulatory requirements including retention, and storage requirements. This outsourced solution also ensures business continuity with a replicated data center, end-to-end business continuity planning and testing, complete failover operations, and routine back-up processes.

Synergy Express is a high availability service that provides guaranteed system uptime, and ongoing access to Symitar's imaging, technology, and security experts. Synergy Express leverages three base modules that provide intuitive operation and robust functionality that can be customized to support your organization's specific requirements.

### **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 secure VPN methodology.

**Synergy Reports™ – Fully Automated Report Capture and Retrieval**

Synergy Reports leverages ERM (enterprise report management) technology to fully automate capture, archival, and retrieval functions while creating a centralized warehouse of all archived reports, statements, and notices. Users can retrieve content using a single point of entry, which protects the security of reports and saves time.

Synergy Reports' built-in security system allows quick report access to authorized personnel via secure VPN methodology. 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 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 archiving 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 with proper access rights.

**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, and batch multithreading 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 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, organizations can add to the convenience of Synergy eSign electronic signing by capturing signatures directly from an iPad. This allows you to take the electronic signing process to the customer, instead of requiring the signer to be present at the organization.

### **Synergy eSignWeb™ – Web-based Signature Capture**

Synergy eSignWeb captures e-signatures via the web and includes secure document delivery. This gives customers the ability to view and sign documents securely with a true PKI (public-key infrastructure) signature. You can quickly and confidently send lending, customer service, and trust documents to customers, 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 customer profiles are accurate at the point of entry.

## PRODUCTIVITY MODULES

### **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.

**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 customer service and responsiveness by reducing the time required to conduct ongoing research.

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

*jha*Enterprise Workflow is built for organizations looking to automate business processes that include manual and automatic steps. It generates material operating efficiencies, reduces operating costs, and reduces operational risks. *jha*Enterprise 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.

Synergy ECM Modules	Synergy Document Management	Synergy Check Archive	Synergy Reports	Synergy Express
<b>Capture Modules</b>				
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
<b>Productivity Modules</b>				
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

**WHAT IT DOES:**

- Incorporates key functionality of the Synergy Enterprise Content Management (ECM) platform to provide a comprehensive outsourced ECM solution
- Provides a fully managed service that leverages Symitar's extensive data center infrastructure and sophisticated processing environment
- Offers a high availability service with guaranteed system uptime
- Provides state-of-the-art security
- Ensures compliance with all related regulatory requirements
- Ensures business continuity during temporary business interruptions or catastrophic disasters
- Integrates new imaging and storage technologies when proven, appropriate, and practical

**WHAT IT DOES FOR ME:**

- Streamlines and simplifies the entire enterprise-wide content management process
- Significantly reduces the considerable capital expenditures required for in-house ECM systems including most hardware and staffing requirements
- Enables full implementation in a fraction of the time required to install in-house solutions with minimal involvement by your staff
- Significantly reduces the ongoing operation, maintenance, and administration of the ECM solution
- Eliminates ongoing capacity planning by seamlessly supporting planned and unexpected data storage volume increases
- Supports planned and expected volume increases
- Enables existing staff to focus on the core competencies of the business and customer care
- Provides ongoing access to Symitar's imaging, technology, and security experts

