iSynergy

Small Business Imaging and Workflow Solution

Advanced User Manual

Version 3.9.3

Version 3.9.3 -- 5/25/2010

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Welcome to iSynergy 3.9!

iSynergy is the award-winning browser based content management platform designed to simply integrate business process automation, human resource allocation and document management in one simple to deploy application that empowers users to innovate how they manage and share content with the enterprise. As a comprehensive information management solution that provides user-friendly solutions for the capture, storage, exchange, revision, and protection of business documents in a digital environment. iSynergy dramatically enhances personnel productivity while simultaneously reducing the cost of running a business. Using a standard browser interface, employees, customers, and vendors can easily access information they need.

iSynergy is built on an open platform that allows for the expansion of its base capabilities. It easily connects to host and legacy systems, expanding the functionality and leveraging the value of a company's current hardware and software investments.

Moreover, iSynergy maintains a central, enterprise-wide repository for the storage of all Documents, unstructured information, and files that comprise a company's intellectual property. iSynergy empowers a company with the means to create new information management solutions that automate many business operations. This empowerment is possible without the need to understand programming or scripting.

iSynergy users may employ search functionality to retrieve documents which they have permission to access. Once a User retrieves a document, they can: view, manage, share, and reproduce the information. Some of these functions are dependent on permissions granted by the System Administrator. Searches can be very broad or more specific in nature depending on the desired result set of the search performed.

iSynergy can be finely tuned to grant highly granular access rights to individual iSynergy users. For example, a customer service representative may be granted unlimited access to Applications that contain public information, moderate levels of access to pricing information and denied any access to confidential information. iSynergy makes it easy to selectively control access rights to information for each individual User.

iDatix engineered iSynergy on popular development platforms. All of our software products conform to RAD (rapid application development), ODBC (open data base connectivity) and other industry-wide software development standards. iDatix has ensured that iSynergy smoothly integrates with enterprise networks. In addition, in-house customization is possible for all organizations.

What's new in 3.9

iSynergy 3.9 furthers the iDatix mission to Simplify the Workplace for your growing business. In this release, iDatix has added customer requested feature enhancements to make iSynergy simple to use, as well as enabling the user to boost organization efficiency and work throughput.

The highlights of this release include:

- **Revision Control.** iSynergy provides support for collaborative document development and process document modifications. The Revision Control feature is a seamless extension to the iSynergy User Interface that completely integrates the full functionality of the MS Office suite. In 3.9, iSynergy supports document versioning and maintains a complete history and audit trail for all document changes.
- **Application Level Permissions.** Application Level Permissions now provide the ability to control user and group permissions on a per application basis. The iSynergy user who creates an application now has the ability to add indexes

without defining the user permission first. Administrators can delegate application administration to different users, apply permissions on a per application basis to enhance access security and apply permissions to multiple applications simultaneously.

- **Named Database Independence.** iSynergy provides the ability to configure and install the repository as a named database as indicated by the System Administrator. This flexibility allows for the deployment of separate iSynergy installations to the same database instance.

iDatix Technology Development Methodology

The iDatix software design methodology rests upon the concept of producing intuitive software products to enable business users to automate their own environment. It is important to understand that each user working in business today has the knowledge to make their business processes easier and more effective.

iDatix produces the tools to allow the vision of an employee or an organization to be implemented and deployed quickly, without extensive IT dependence. Leveraging the understanding and ideas of every employee and using an effective business automation solution is the key to enhancing productivity and quality within the business.

Change must be embraced. Our solutions must provide a simple way for the end user to modify and enhance the solution to meet the changing needs of the business.

Key to this understanding is dividing the automated business solution into its components.

- What is the critical area of focus?
- What is the biggest area of need?
- What is the process today?
- What are the process gaps and bottlenecks as they are found today?
- What Documents are used in the process?
- What Systems/Applications are used in the process?
- What is the vision of how to automate the process?
- How can documents, data and users be driven to the same point at each step of the process?
- How it is tied together?
- How is it deployed?
- What is the most efficient, cost-way to make it happen?
- How do we optimize the new solution?
- How do we expand the utilization and benefit of the system?

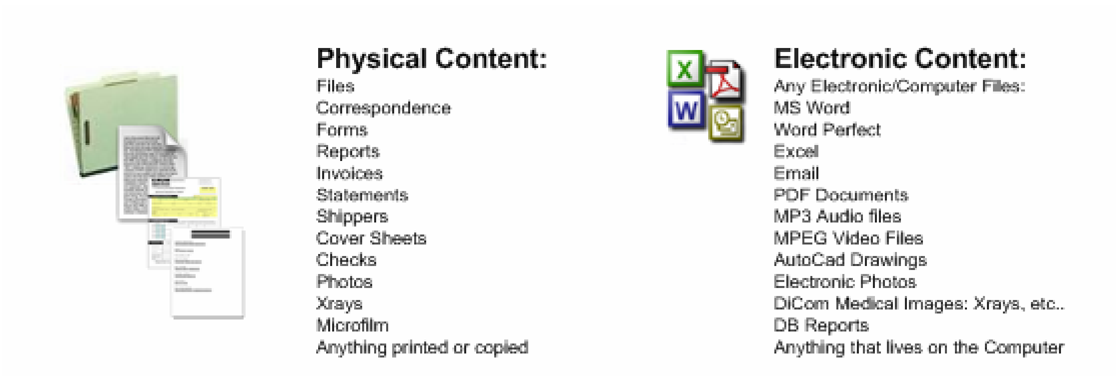
Client Support Services Contact Information

Pitney Bowes is committed to providing quality service and support for our customers. If you are experiencing difficulty with your iDatix software, please let us hear from you so we can help. You may reach us by phone at (877) 250-7939

What is Content and Content Management

In its basic form, content is any type of digital information. It can be text, images, graphics, video, sound or documents. In other words, content can be anything that is likely to be managed in an electronic format.

Content Management is a system or the capability to manage and track the location of, and relationships among, a firm's content at an element level in a repository. Content Management is effectively the management of the content, by combining rules, processes and/or workflows in such a way that its' electronic storage is deemed to be managed rather than unmanaged. Content management systems can manage entire binary files (documents), components of files, or XML/SGML data.



In other words, content management, simply stated, is the process of sharing information vital to an organization in a structured format. In most organizations, unstructured content enters an organization's infrastructure from a variety of sources. Regardless of how a piece of content enters, it has a lifecycle.

Revision control. Files can be updated to a newer version or restored to a previous version. Changes to files can be traced to individuals for security purposes.

***Indexing, search, and retrieval*.** For data to be valuable, it must be relevant to the task at hand and accessible in a timely fashion. Documents can be parsed for keywords, headings, graphics, and other elements; mechanisms for processing search requests become critical. One of the greatest benefits of a strong electronic content management system is the ability to get out what you put in. By having strong indexing, taxonomy, and repository services, locating the information in your system should be simple.

Scanning. Paper generally enters the organization through a scanner, or sometimes, a multifunction device. In centralized scan operations, large volumes of paper are put into the system by dedicated workers. In distributed operations, smaller volumes of documents are captured with lower volume scanners or multifunction devices closer to their point of creation.

Document Imaging. Software captures the image of the paper document. Increasingly, electronic document images have the same legal status as a paper document.

Indexing. An essential part of the capture process, creates metadata from scanned documents (customer ID number, for example) so the document can be found. Indexing can be based on keywords or full-text.

Repositories. Structured and unstructured-the core of many ECM systems. This is where the data resides and where much of a company's investment in ECM resides. A repository can be a sophisticated system that costs hundreds of thousands of dollars, or as simple as a file folder system in a smaller company. The key is to have information that can be found once it is placed in the system.

Content Life Cycle. The various phases that content moves through, such as authoring, review, management, delivery, and archiving

Storage. Content needs to "live" somewhere. Storage technology (optical disks, magnetic, tape, microfilm, RAID, paper) provide options for storing content online for rapid access or near- or off-line for content that isn't needed often.

Rules of thumb for data storage:

- There are approximately 2,500 pages per drawer in a standard 4 drawer filing cabinet.
- There are approximately 2,000 pages per linear foot of documents.
- A standard 8” x 11” paper when stored as a Group 4 is approximately 50k.
- A standard check image is about 15k.

Content Integration. Enables disparate content sources to look and act as a single repository.

Migration. As storage media ages, content must be moved to new media for continued accessibility.

Backup and Recovery. Backing up content in various formats and/or locations helps to ensure business viability in the face of a disaster.

Long-Term Archival. Content that must be preserved over decades must be saved to media, such as paper and film-based imaging, with longevity to match.

Foundational Terminology

The purpose of this section is to provide foundational terminology and reference material for specific concepts contained with this User Manual.

- **Application**: In iSynergy, an Application is the digital equivalent to a filing cabinet.

  For example, on a basic level, the Applications created and used within iSynergy to store documents are similar to traditional filing cabinets. Examples of filing cabinets, and therefore Applications, that are common to many businesses include: Accounting, Operations, Insurance, and Human Resources. Typically, employees responsible for Insurance documentation store their Documents in a filing cabinet separate from employees responsible for tracking Operations. Having separate filing cabinets for the two departments is generally advantageous for the efficient storage and retrieval of information for each department. It is also sometimes necessary to store particular Documents in a separate cabinet for the security or sensitivity of the contained information. Within iSynergy, creating separate Applications for different departments also proves useful for similar reasons.

- **BIT**: A BIT is a binary digit taking a value of either 0 or 1.
- **Byte**: In a byte, the information storage measurement is a unit, usually considered to contain eight bits.
- **Database**: A database is a collection of information organized in such a way that a computer program can quickly selected desired pieces of data.

  Note: For the purpose of this document, you can think of a database as an electronic filing system.

- **Document:** A Document is any electronic file. In addition to text, Documents often contain graphics, charts and other information elements.

  For example, a Document can be a Word document, PDF file, Excel spreadsheet, any audio file or a TIFF image.

- **Document Type**: Within iSynergy, a Document Type identifies the type of document contained within an Application.

  For example, when looking in an Employee folder what documents types would you expect to see. Documents common to all employees' folders might include: Job Description, Time Sheet, Contact information, and Reviews. These commonly encountered types of Documents are Document Types. Other examples of Document Types include Purchase Orders and Receipts, found in a separate Application (filing cabinet) called Accounts Receivable. Notice that different Applications tend to house different Document Types.

- **DPI**: Dots per Inch is a measure of printing resolution, specifically where the number of individual dots of ink a printer or toner can produce within a linear one-inch 2.54 cm space. There is one pixel per dot.
- **Pixel**: A pixel is a single point in a graphic image.
- **Group 4**: Group 4 is a compression method for monochrome bitmaps used by a fax machine. Additionally, it is also available as one of the compression options in the TIFF file format.
- **Checkout**: The act of locking a document in the repository for editing purposes. Checking a document out, locks it and prevents other users from editing the document at the same time. This prevents the loss of work as one user must wait until a document is available to be checked out before they will be allowed to edit the document.

  For example, if there are two members of an Accounting department working on the same invoice, if one of the users has checked out the document to complete some type of work, the other user will be unable to checkout the same document.

- **Check-in**: The act of adding a new document revision to the repository. Performing a check-in will add the changed document to the repository and unlock it so that other users will be able to see the changes and make further changes to the document.

  For example, if a document has been checked out, it must be checked in. The documents will be numbered according to the revision number. Additionally, depending on the account functionality management permissions that are granted, the user will have added document management capabilities.

- **Index:** Within iSynergy, an Index is similar to a label on a traditional folder.

  For example, in the Application example, Documents were stored and retrieved in folders according to 'Employee Name'. 'Employee Name' is therefore an example of an Index. Indexes help to identify Documents. The storage and retrieval of Documents within iSynergy relies on Indexes, much the same as traditional cabinets and folders rely on proper labels.

- **System Status**: iSynergy maintains a status on all documents in the repository. This status tracks whether the document is searchable, deleted or waiting to be indexed or scheduled to run in an external application to perform a task.

- **Document Status**: iSynergy provides the ability for the designer to create statuses on documents. These statuses can be used to create an ad-hoc workflow or manage document status specific to the application being created.

  For example, the status of a Document is its “progress report”. The Status of a Document may change as it passes through a business process. Example values for Status include: Reviewed, Signed, Accepted or Rejected. These status values can be defined as a UDL field.

- **UDL:** Within iSynergy, a UDL is a User Defined List. Some Index values may be User Defined in that its’ is not unique, but rather chosen from a user defined list.

  For example, a User Defined List limits choices of an Index value during data entry. When used properly (a list of eight or less is common), UDLs greatly increase data entry efficiency and accuracy. UDLs occur as drop-down menus in the iSynergy interface. Index values that are good example candidates for use with a UDL include Document Status and Document Type (assuming a limited number of Document Types exists).Very poor example candidates for inclusion within an associated UDL include Date and Invoice Number, due to the limitless number of possible values.

- **Revisions**. A Revision is a representation of a document at a point in time. A document can go through many revisions. iSynergy can track the revisions of the documents and maintain a history of the document along with, who, what and why the changes were made.

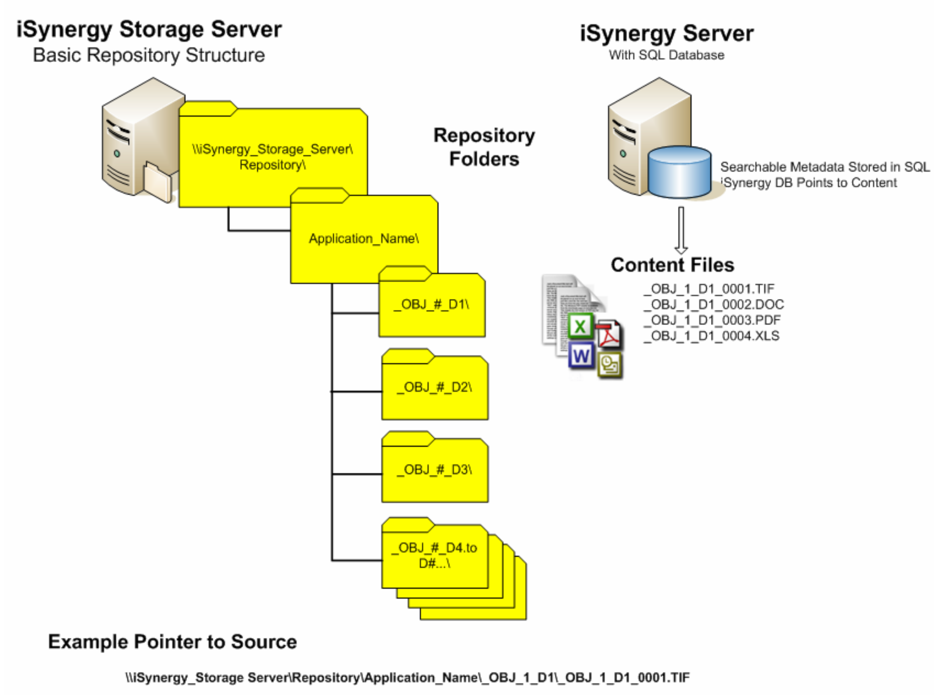
  For example, when a document has been checked in or checked out of the system, each action will create a unique document revision number. This number is displayed in both the Search results as well as in the Object Table within the repository.

- **OCR**: Optical Character Recognition is a type of computer software designed to translate images of handwritten or typed text usually captured by a scanner into a machine-editable text.
- **Repository:** iSynergy can store and manage any Document type for your organization.

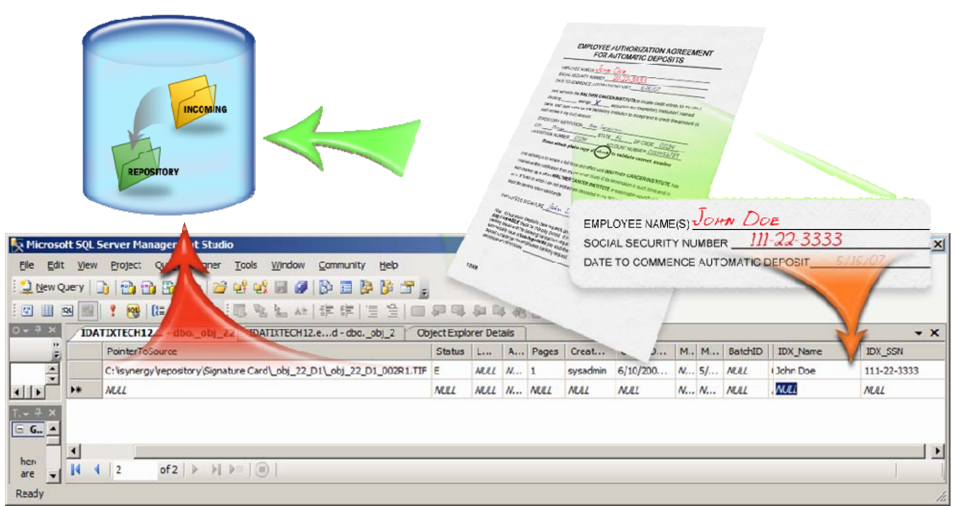
  Additionally, the iSynergy Repository is a centralized location in the organization’s network that stores all information within the iSynergy system. The iSynergy Repository allows for the structured storage, access, management, exchange and protection of enterprise information. iSynergy is designed to categorize and archive all forms of intellectual property, including multimedia presentations, PowerPoint presentations, spreadsheets, marketing literature, word processor Documents, Adobe PDF files and sound files such as mp3 and wav. iSynergy can store and manage any Document file type you can store on your desktop workstation.

iSynergy Basic Structure

There are two basic components to the iSynergy structure, they are: a repository and a database. The repository is where the documents are stored and is connected to the database by the pointer to source field within the object table. The documents maintain the original file extensions within the repository, meaning if the document was a .doc, .pdf, .tif, etc, it would still be in that file extension. The pointer to source in the repository is the stored directory location for the content and it is stored by a named UNC path. There can be multiple repositories, as the original pointer to source entry point never changes.

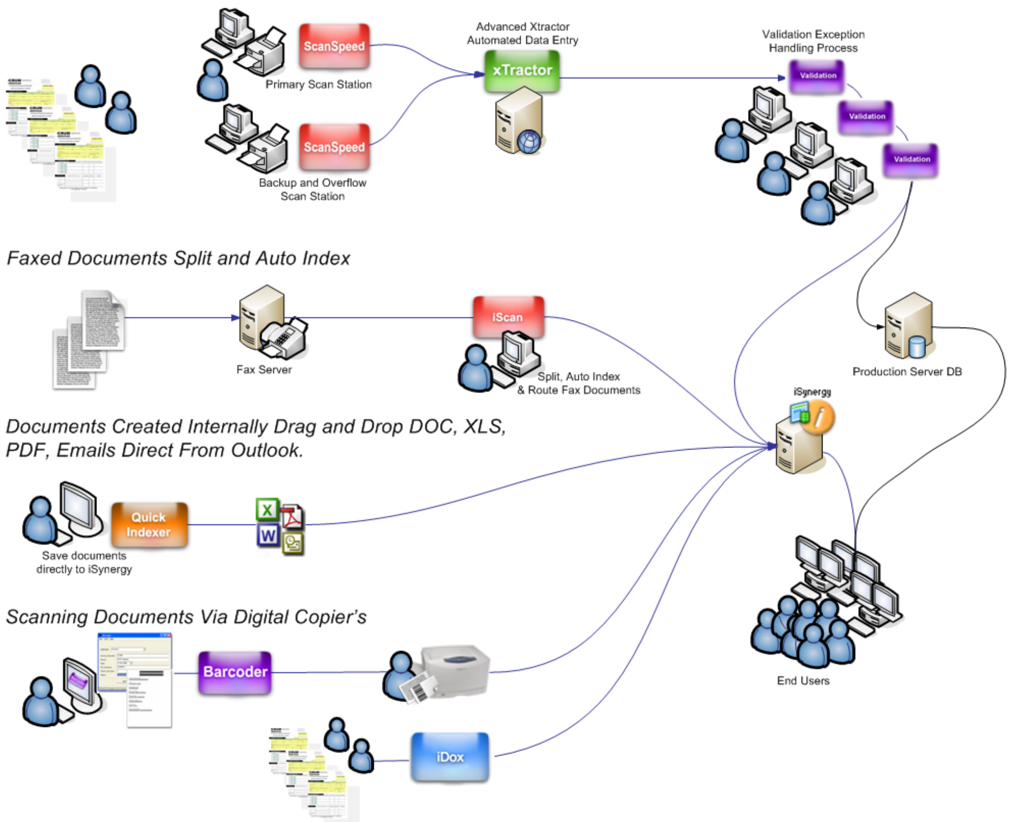


A database is a structured collection of tables that is organized so that its data contents can be easily accessed, managed and updated. The database tables contain rows and columns that store the data by an index value or metadata. Each table column is an index value, while each row within that column is the data for a specific document. A row in the table is represented by a sequential item number.



Content and Information Flow

Content lives and exists everywhere either in physical or electronic format. Content that needs to be captured and can be done via numerous devices: fax, scanning, drag and drop from the desktop, intercepted from a print stream, or electronic capture mechanism**.** The data is captured by key data elements called index values, or metadata. The index values along with the metadata reside in the database. The document resides in the repository. They are linked by the pointer to source fields.



iSynergy Installation Requirements

Supported Server Platforms

- Windows 2003 Server
- Microsoft SQL Server 2005
- IIS 6.0.

> *Note: It is highly recommended that the server be updated with all the current Microsoft service packs, patches and hot fixes for both Server and SQL Server prior to installing the iSynergy Database. For more information, please refer to: http://msdn.microsoft.com/en-us/sqlserver/bb671254.aspx*

Hardware

The following table lists the minimum recommended hardware requirements for any server running an iSynergy server component:

Component	Minimum	Recommended
Processor	**Pentium 4, 2.8 GHz**	**Quad Core**
Memory	**2 GB**	**4 GB**
Hard Drive	**80 GB, Raid 1 or 5**	**160 GB, Raid 1 or 5**

SQL Server Configuration

The SQL Server manages the information repository for iSynergy, and where all of the references and statuses exist for tracking the information contained within the system. This makes iSynergy very expandable and customizable for the Client.

> *The Database is an open architecture to allow third parties and clients to add further enhancements and interface with other systems.*

Installation of the iSynergy database on the SQL Server has six main requirements:

- Windows 2003 Server.
- Knowledge of the SQL Server SA account password.

> *The iSynergy setup program needs administrator privileges to install the iSynergy database.*

- Microsoft SQL 2005.
- Installation of the SQL Server 2005 software has been installed in the environment.
- .Net Framework Service Pack 2.
- Knowledge of the desired installation location of the iSynergy Database.

> *This decision is based upon network architecture, data redundancy policy and disaster recovery policy.*

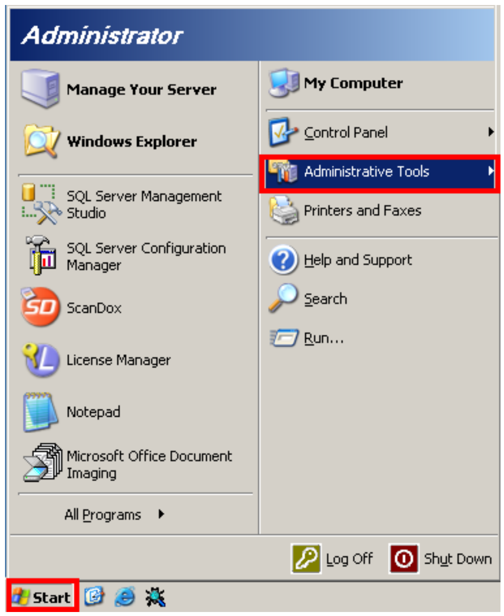
Web Server Configuration

Windows Server 2003 should have all of the IIS 6.0 components required for installation of the iSynergy Web services installed by default.

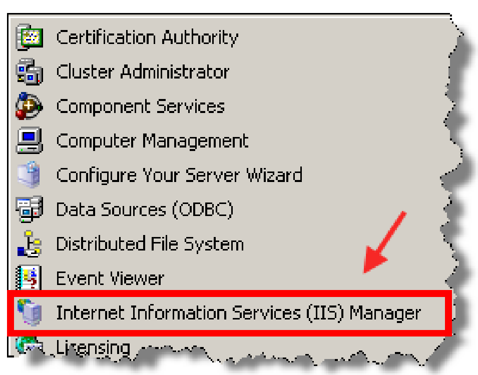
IIS 6.0 Installation on Web Server

To confirm that IIS 6.0 is installed on the Web Server, follow these steps:

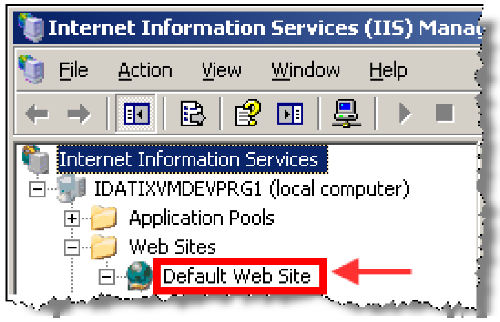
1. From the Web Server desktop, select **Start>Administrative Tools**.



2. Select **Internet Information Services (IIS) Manager.**

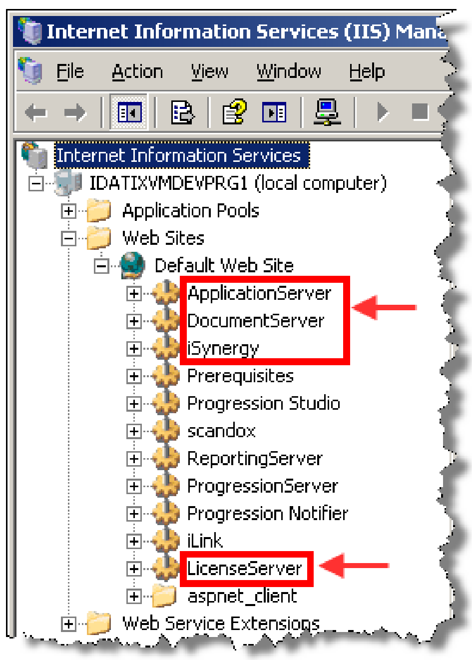


3. From the Root console, drill down to **Web Sites>Default Web Site**.



4. Ensure the following Servers have been installed.

   - Application Server.
   - Document Sever.
   - iSynergy.
   - License Server.



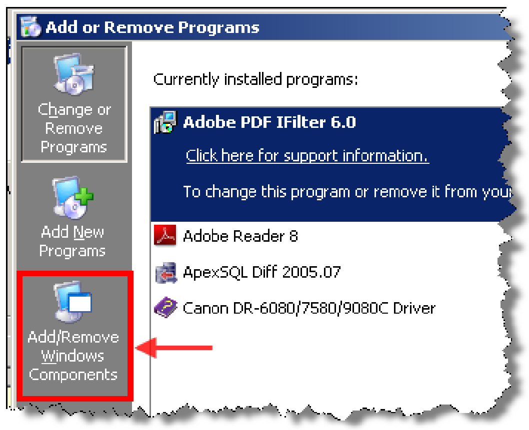
IIS 6.0 Installation on Microsoft Server 2003

If IIS is not installed on the target Web Server or IIS has been removed from the server, follow the below steps to install IIS.

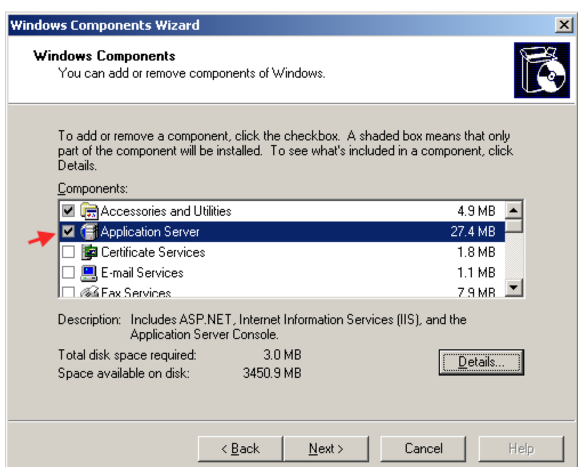
1. From the Web Server desktop, click **Start**>**Control Panel.**

2. Select **Add or Remove Programs**.

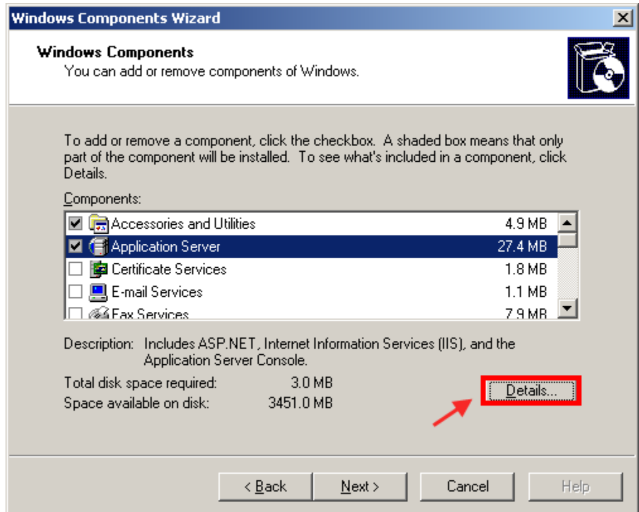
3. Select **Add/Remove Windows Components**.



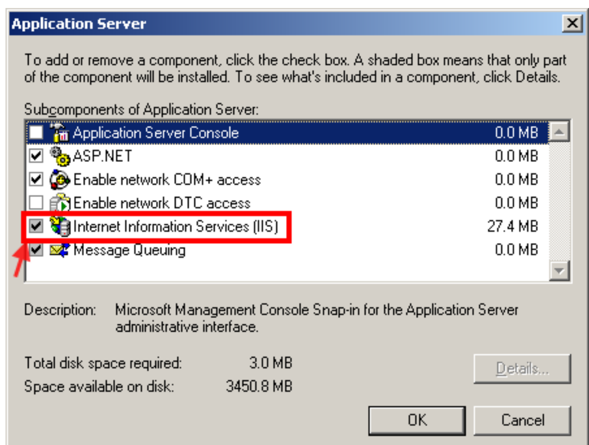
4. Select the **Application Server.**



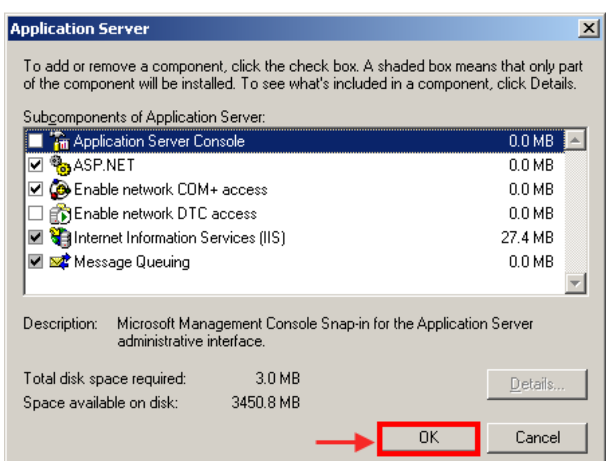
5. Click **Details** and verify WWW, FTP and SMTP are enabled.



6. **Verify** Internet Information Services (IIS) is installed.



7. Click **OK**.



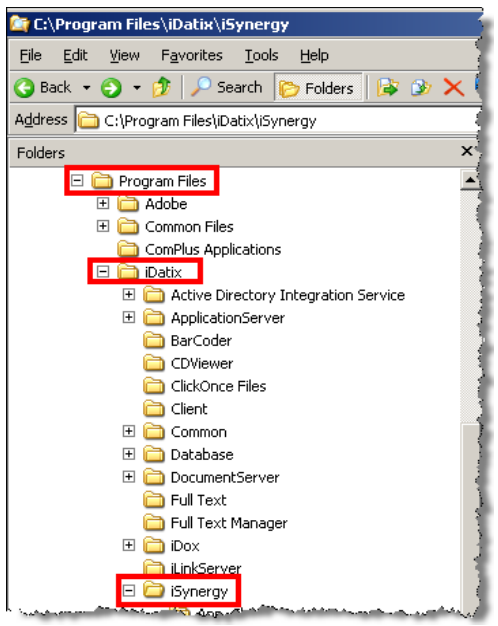
Customize iSynergy Option

iDatix has provided an additional option to customize the look of iSynergy. Upon purchasing the product out of the box, by default you are provided with an orange skin. However, should you wish to customize the look of the iSynergy solution, follow the below instructions.

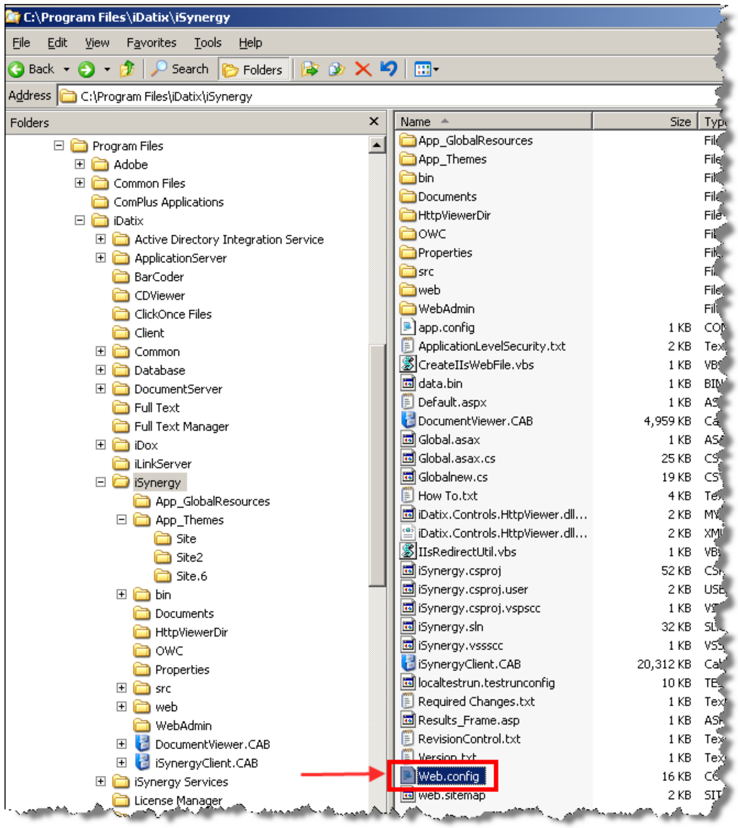
Note: This section assumes you have already installed the product.

1. Launch a **Windows Explorer** window.

2. Navigate to **C:\Program Files\iDatix\iSynergy.**

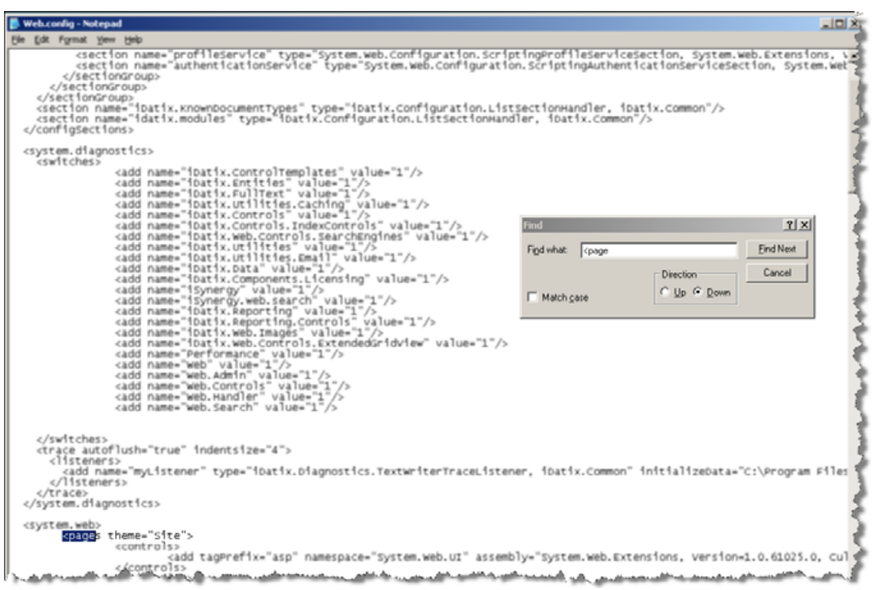


3. Navigate to and select the **web.config file**.



Note: Notepad opens the web.config file.

4. Within the web.config Notepad document, search for **<Pages theme = "site">**.



5. Change the "**Site**" to the site name of the new theme.

Note: An additional theme is delivered with iSynergy, to use this theme change the site to 'blue.' When creating a new site css set, you will need to create a CSS for IE 6 and 7. Name the IE 7 CSS directory as the theme name and place it in the Program Files\iDatix\iSynergy App_Themes directory. To support IE 6, create the CSS directory as name 6. Be sure to keep the name of the Css files as site.css

6. Select **File>Save**.

Note: By selecting File>Save, you do not have to manually restart IIS because this save action will automatically restart IIS and launch the application for you. Additionally, if you are using IE 7, no additional skin changes are required. However, if you are using IE 6 iSynergy will automatically append the file a'.6' to the theme name that has been detected.

iSynergy Login

Accessing iSynergy is as simple as starting your Internet browser, entering the iSynergy URL and logging in.

1. Start your **Internet Explorer** browser and enter the appropriate Web address for the iSynergy system in the address field.

Note: After an install, Internet Explorer should automatically launch the log in dialog, however, if this does not happen, contact your System Administrator if you are not sure what to enter in the address field. Additionally, it is important to note iDatix does not support Mozilla Firefox internet browsers, only Internet Explorer.

2. Click **Go** or press Enter.

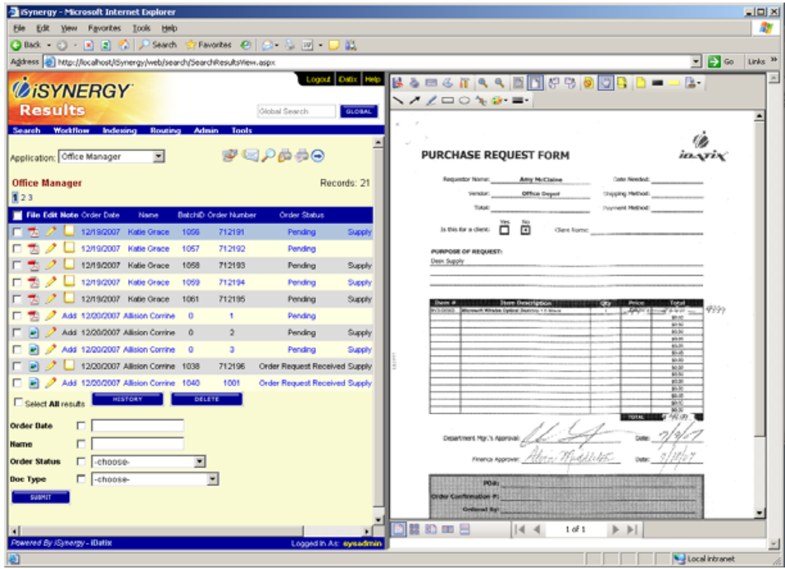
3. At the Login screen, type in your **Login ID** and **Password**

4. Select **Login**.

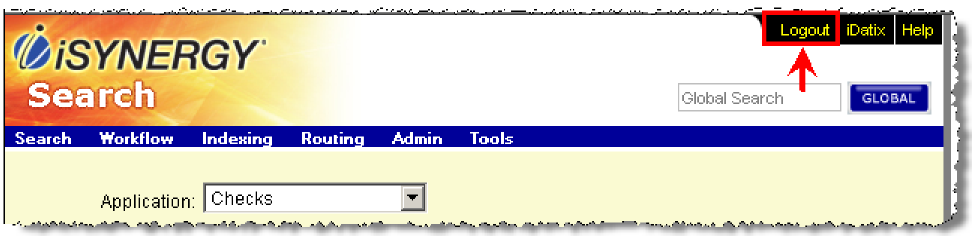
Note: If the login is unsuccessful, iSynergy displays an error message and the cursor returns to the Login ID field. Retry the login and make sure to check your keyboard's capital lock key indicator. Remember: Passwords are case sensitive!

5. A successful **Login** displays the default view of the Search page.

Note: The Document Pane is initially empty and remains as such until a completion of a search.



6. To log out of the iSynergy program, simply select **Logout** on the Search page.



Note: By design, iSynergy automatically logs out a user when the program has been inactive for 30 minutes. If you want to change the default System Options, navigate to Admin>System Options>Login Timeout>Edit. Upon re-activation, iSynergy returns the user to the Login dialog box. To continue working with the program, the user must reestablish their login by entering their login ID and password combination again.

Understanding iSynergy

iSynergy provides a completely automated paperless business solution for any business, department or enterprise. It is capable of starting at the departmental level and expanding to meet the needs of a global enterprise. iSynergy saves millions by making a dramatic impact on all business processes, improving productivity, quality, compliance and security while reducing the costs of filing, storage, distribution, shipping and other labor associated with document processes.

iSynergy Server is the heart of the iSynergy suite of products. iSynergy Server is a Web Server application that provides the main browser-based user interface for all users who want to search, retrieve, view, fax, print, email, or apply annotations to the documents contained in the iSynergy repository. It also contains the administration component where system administrators can add and manage users, build user and group security, and create new iSynergy applications. The iSynergy Server is sold as part of the concurrent user licenses and is included with all base user sales.

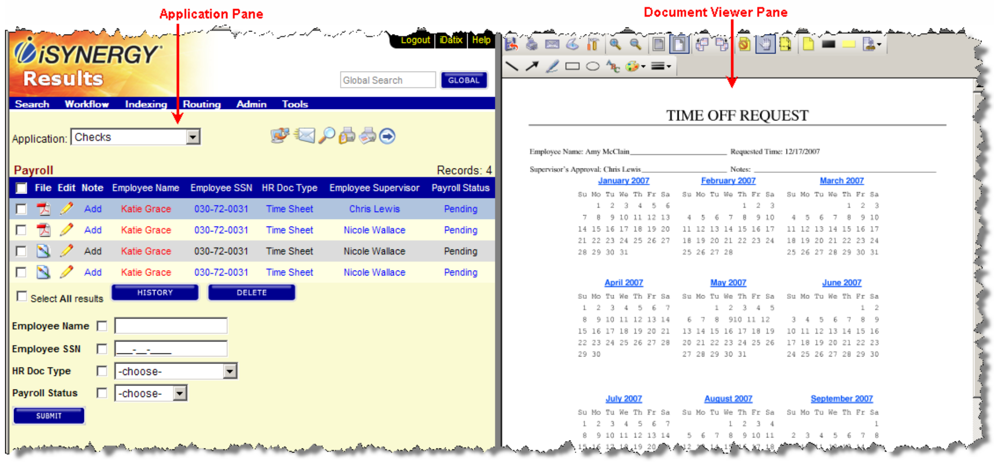
iSynergy Server also provides basic Ad-Hoc Workflow for business process automation and reporting. All documents stored in iSynergy maintain a complete Audit Trail for compliance purposes. iSynergy's complete, modular approach provides a scalable solution that can meet the demands of the users with the most complex data issues and highest document volumes. With iSynergy's intuitive user interface, users find any document quickly and easily. Our users have enjoyed dramatic ROI's from labor reduction and productivity improvement almost immediately after implementation.

iSynergy captures documents from virtually any source, automatically indexes them using recognition technology and/or data from third-party applications. All modules of iSynergy are integrated ensuring compatibility and success in storage and retrieval functions combined with workflow and integration to key line-of-business applications. This complete integration makes iSynergy easy to use and maintain and provides the ability to expand iSynergy into other departments and business units. The iSynergy Solution is completely scalable to meet the requirements of both small and large organizations.

The iSynergy suite of products is comprised of a variety of modules each with a specific function and purpose to create a fully automated paperless enterprise. Because all modules have been developed by iDatix, they are seamlessly integrated with each other. These iSynergy modules provide the ability for creation of a very specific and customized solution to satisfy any business need, requirement or process. The overall functionality of iSynergy can be illustrated by the following diagram:

Application Pane

iSynergy is browser-based, making use of familiar and intuitive browser controls. If you can browse the Internet, you can work in the iSynergy interface. The iSynergy User interface has two primary viewing panes: the Application Pane and the Document Viewer Pane.



By default, the Application Pane loads the Search page following a successful login. The Application Pane varies in content and functionality depending on the current task the User is performing as well as permissions granted to that User.

> *For example, only certain Users with granted permissions are able to access the functions available on the Admin or Indexing pages. For a complete understanding of iSynergy Permissions, please review the Permissions section of this manual.*

Pages displayed within the Application Pane (dependent on functionality and permissions) include:

- Search page.
- Workflow page.
- Indexing page.
- Routing page.
- Admin page.
- Tools page.

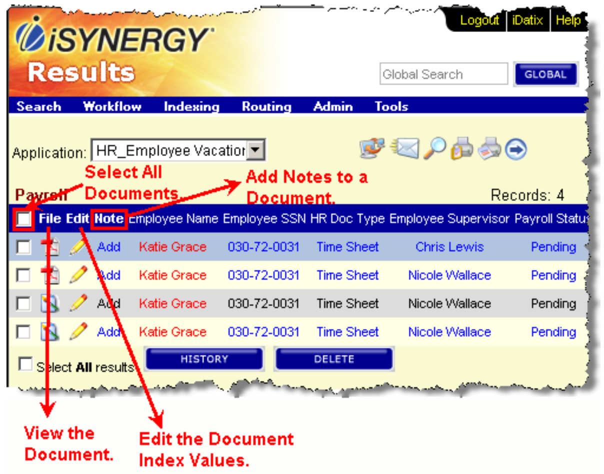
Examples of functions performed within the Application Pane and its' associated pages include:

- Query for Documents.
- Build and maintain electronic filing Applications through user and group permissions.
- Set permissions controlling access to data.
- Index Documents.
- Route Documents.
- Print individual or multiple exported Documents.
- Email individual or multiple exported Documents.

The Application pane provides the ability to view with the documents. There are four Selection Columns.

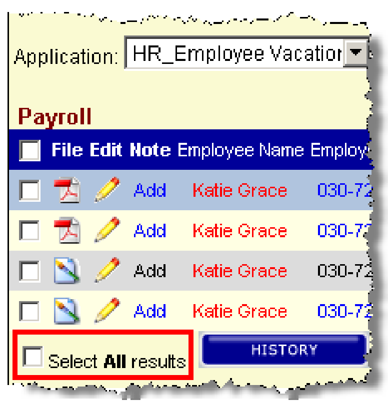
- Select All Documents.
- View File Column.
- Edit Index Column.

- Add Notes Column.

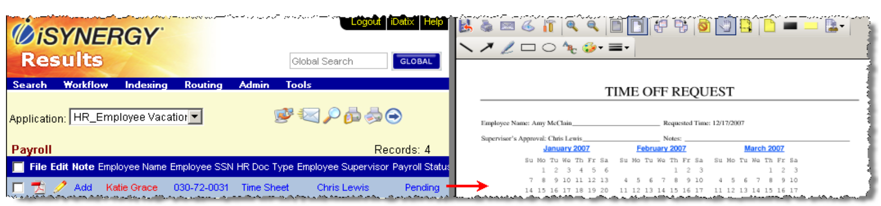


Element	Description
Select Documents Column	Use this column to select one or more Documents for further processing such as exporting, emailing, and printing. To select Documents individually, mark the appropriate checkboxes. To select all the Documents displayed on the current page, mark the checkbox on the far left of blue header row.

Note: Marking the Select All results checkbox at the bottom of the Results Table will select all Documents on all pages of the results.



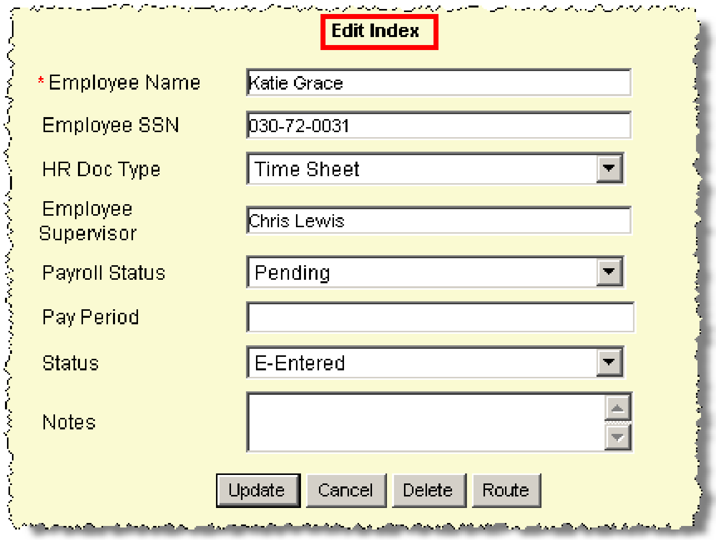
View File Column Selecting a File icon from the View File Column loads the first page of the selected Document into the Document Pane, as well as highlights the row of the selected Document in blue.



Note: If you are viewing the Results table in full screen mode, the *selected Document loads in a new modal dialog window.*

Edit Index Column

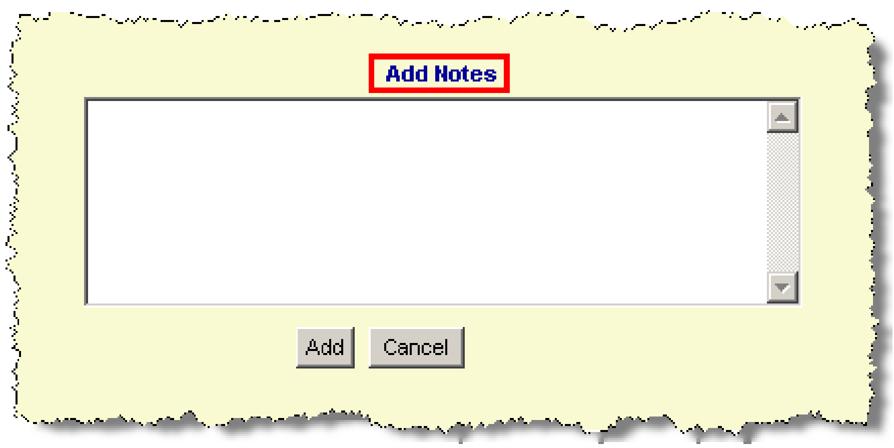
Clicking the Edit icon of the appropriate Document displays the Edit Index page.



Note: From the Edit Index page, a User can update Index values, perform a soft delete, or route the Document.

Add Notes Column

Selecting the Add Notes icon of the appropriate Document loads the Notes page of the selected Document.



Note: Multiple notes entered on the Notes page appear sequentially with a stamp that indicates the date, time, and user that entered each note.

Index Value Columns

The Index Value columns display the Index values for Documents returned from a search query. The Column Header represents the Index Name, which are hyperlinks. Clicking an Index value in the Results table begins a Cross Query search for the selected value.

Sort Order

By default, the sort order for the first three Index Value columns (left to right) is ascending. Values in the first Index Value Column receive primary sort preference, while values contained in the second and third Index Value Columns are sorted sequentially. This sequential sort order results in the alphabetical grouping of similar Names followed by subsequent sorting of Doc Type, followed by sorting of Status .

Modifying Sort Order

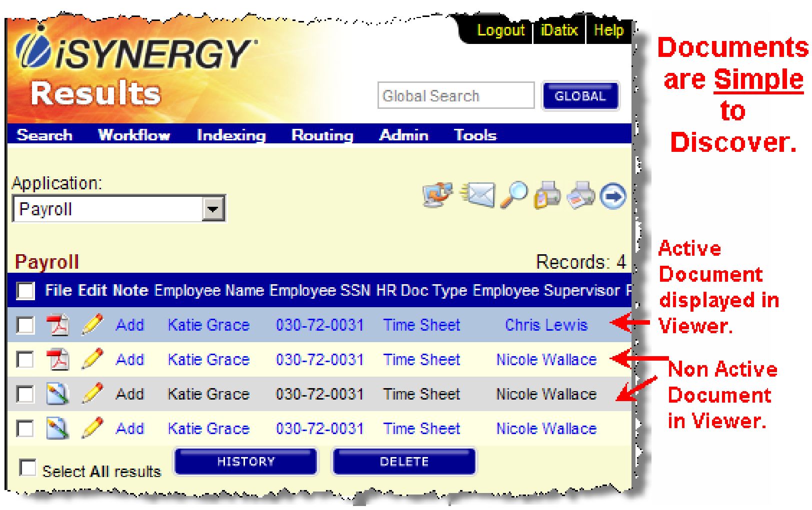
Index value column headers (Index Names) serve as hyperlinks for sort order functionality. Clicking on an Index Name once will sort the contained values in an ascending order. Double-clicking an Index Name will sort column values in a descending order. Clicking the Index Name a third time removes sort order or, if the Index Value column is one of the first three columns in the table, the default sort order of the column is restored.

The column(s) selected for sorting, as well as each one's sort order, are displayed at the top of the Results table.

Sequential sort orders provide a cascading filter effect in the presentation of the table data.

Row Color Indication

There are three row colors to provide Simple to Discover Results.

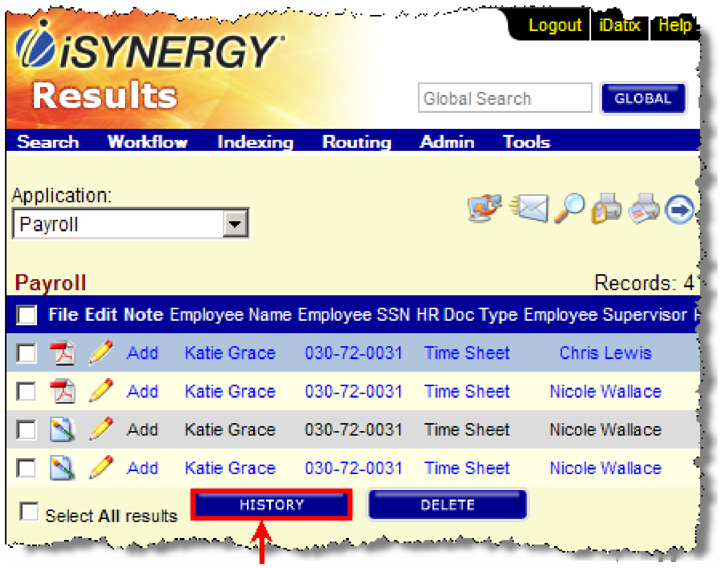


Element	Description
Blue	A blue row indicates the active row.
Yellow	The yellow rows alternate with the gray rows to distinguish between adjacent non-active rows.

Gray The gray rows alternate with the yellow rows to help distinguish non-active rows.

History

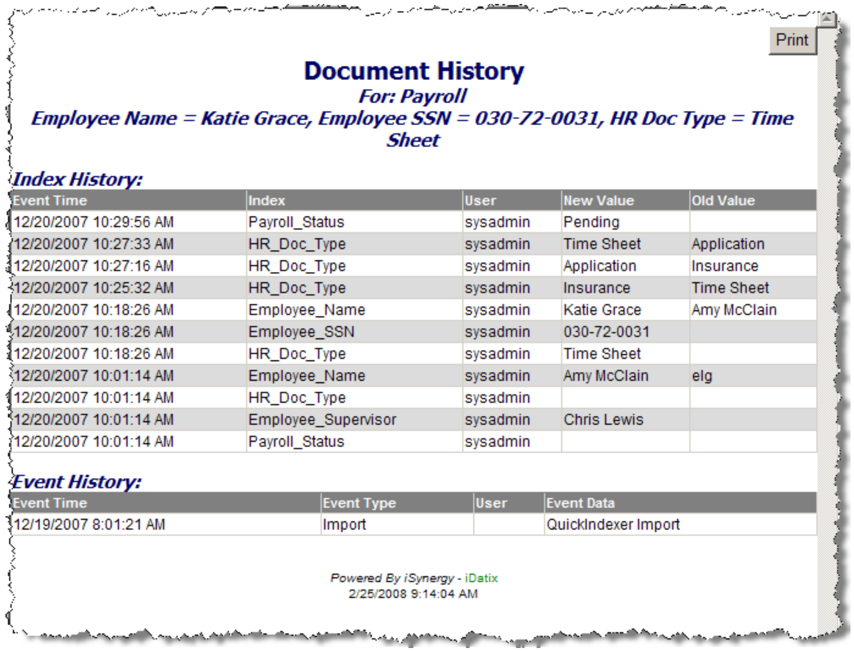
Selecting History displays a listing all of the changes made to the selected Document(s).



Access to History functionality is permissions based by using the System Reporting>System Management .

Items tracked by History include:

- The creation of the Document
- Subsequent modifications
- Index updates
- Status changes



Print

Document History

For: Payroll

Employee Name = Katie Grace, Employee SSN = 030-72-0031, HR Doc Type = Time Sheet

Index History:

Event Time	Index	User	New Value	Old Value
12/20/2007 10:29:56 AM	Payroll_Status	sysadmin	Pending	
12/20/2007 10:27:33 AM	HR_Doc_Type	sysadmin	Time Sheet	Application
12/20/2007 10:27:16 AM	HR_Doc_Type	sysadmin	Application	Insurance
12/20/2007 10:25:32 AM	HR_Doc_Type	sysadmin	Insurance	Time Sheet
12/20/2007 10:18:26 AM	Employee_Name	sysadmin	Katie Grace	Amy McClain
12/20/2007 10:18:26 AM	Employee_SSN	sysadmin	030-72-0031	
12/20/2007 10:18:26 AM	HR_Doc_Type	sysadmin	Time Sheet	
12/20/2007 10:01:14 AM	Employee_Name	sysadmin	Amy McClain	elg
12/20/2007 10:01:14 AM	HR_Doc_Type	sysadmin		
12/20/2007 10:01:14 AM	Employee_Supervisor	sysadmin	Chris Lewis	
12/20/2007 10:01:14 AM	Payroll_Status	sysadmin		

Event History:

Event Time	Event Type	User	Event Data
12/19/2007 8:01:21 AM	Import		QuickIndexer Import

Powered By iSynergy - iDatix
2/25/2008 9:14:04 AM

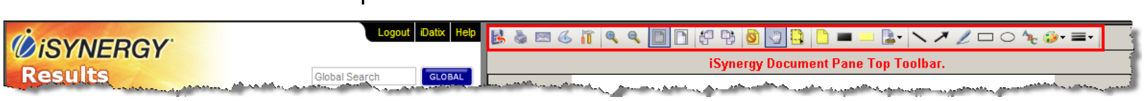
Document Viewer Pane

Within the Document Viewer Pane a user is able to view and manipulate documents. Examples of functions performed within the Document Pane include:

- Zoom in and zoom out on Document images.
- Rotate Documents.
- Document Navigation.
- Locally Print individual or multiple pages of Documents.
- Scan Documents to append to current document in the Viewer.
- Locally Email particular pages of a Document or the entire Document.
- Make annotations on Documents.
- The Document Pane contains the Top Toolbar, the Document image, the Bottom Toolbar with thumbnail/book view options, and the Page Scroll.
- The **Document Pane Toolbars** provide access to the functionality of the Document Pane.
- The toolbars become active once an image is loaded.
- Note: Many tools are permission specific and may not be seen by all users.

Top Toolbar

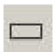
This toolbar is located at the top of the Document Pane.



The following table gives a brief description for the function of each icon on the top toolbar.

Element	Description
Save A Copy	Saves changes made to the Document.
Print	Prints or faxes Document selections using local drivers.
Scan	Initiates the Scan component of iSynergy per the appropriate license you have been assigned. This option is used to append the document currently in the viewer.
Email	Used to email the complete Document or individual pages.
Settings	Used to set user preferences for Printing or Emailing, as well as the PDF Viewer control settings.
Zoom In	Zoom in or out on a viewing selection
Zoom Out	iSynergy remembers the zoom power setting between Documents
Best Fit	Best Fit expands or contracts the image in the View Frame allowing the entire image to display
Fit to Width	Fit to Width expands or contracts the image in the View Frame allowing the entire width of the Document to display
Rotate Left	Rotates the Document selection left in 90-degree increments
Rotate Right	Rotates the Document selection right in 90-degree increments

Find 	Used to search for specific text within a Document.
FullText 	Displays the content of words found in the OCR process
Hide Annotations 	Used to hide annotations on the Document.
Pan 	Used to navigate across the surface of a zoomed in Document.
Select Annotation 	Used to select annotations or redactions.
Insert Annotation 	Used to insert an annotation.
Insert Redaction 	Used to conceal sensitive information. This can be done with any color with black being the default.
Insert Highlight 	Used to highlight information on the Document.
Insert Rubber Stamp 	Used to Insert a Rubber Stamp. Default options are: Denied Received Approved
Insert Line 	Draw lines
Pointer 	Create a line with an arrow

Freehand 	Draw lines freehand.
Rectangle 	Create a Rectangle
Ellipse 	Create an Ellipse
Text 	Create a text box
Foreground Color 	Change the background color of the annotation box
Drop-down menu list 	Select to see items on the list
Line Thickness 	Change the thickness of the lines

Redactions

Redactions provide the ability to conceal sensitive information on a Document.

To insert a redaction, follow these steps:

1. Click the **Redaction** icon.

2. Drag-select over the information you wish to conceal.

3. Release the mouse.

Highlights

The Insert Highlight function enables Users to emphasize important information in a Document by drag-selecting an area to appear in a highlighted box.

To insert a highlighted region, follow these steps:

1. Select **Insert Highlight**.

2. Left-click the mouse and drag a box over the area you wish to have highlighted.

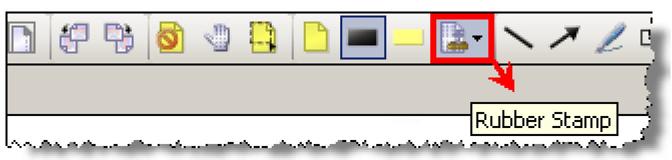
3. The color of the Highlight can be modified, by following the same procedure applied to editing an Annotation.

Rubber Stamp

The Rubber Stamp function gives granted Users the ability to indicate approval, denial, or other endorsements onto a Document by affixing a digital "rubber stamp" impression. The use and modification of rubber stamps is permission based.

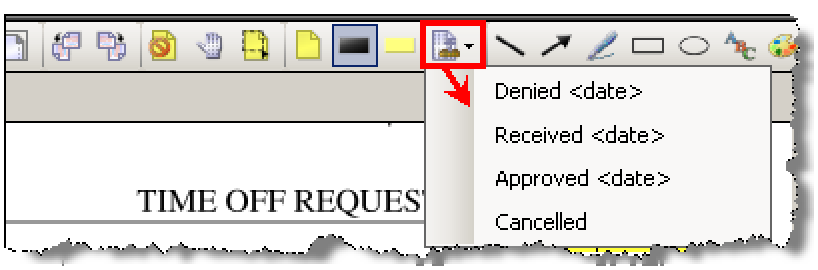
To insert a rubber stamp, follow these steps:

1. Select **Rubber Stamp**.



Note: By default, there are three stamps to choose from: Denied, Received, or Approved.

2. Select a Rubber Stamp from the list and drop it on the Document.



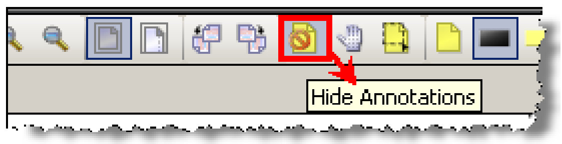
Note: Right-click on the rubber stamp to cut, copy, or delete it.

Hide Annotations

The Hide Annotations function allows users to view an annotated Document without the annotations displayed. Selecting the Hide Annotations tool masks, but does not remove, the annotations from the Document.

To hide annotations, follow this step:

1. Select **Hide Annotations**.



2. Once the Hide Annotations icon is selected, annotations do not display on the Document.

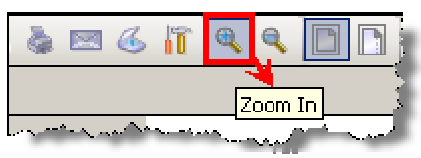
Pan

The Pan function works in conjunction with the zoom feature, allowing you to navigate within a Document once it has been magnified.

To pan a Document, follow these steps:

1. Right-click anywhere on the toolbar to activate the drop-down menu listing toolbar options.

2. Click the Zoom option to magnify the Document.



Note: The zoom tool may also be selected to accomplish this goal.

3. Select the Pan option.

4. Left-click and hold the mouse button to grab and move the page.

Save a Copy

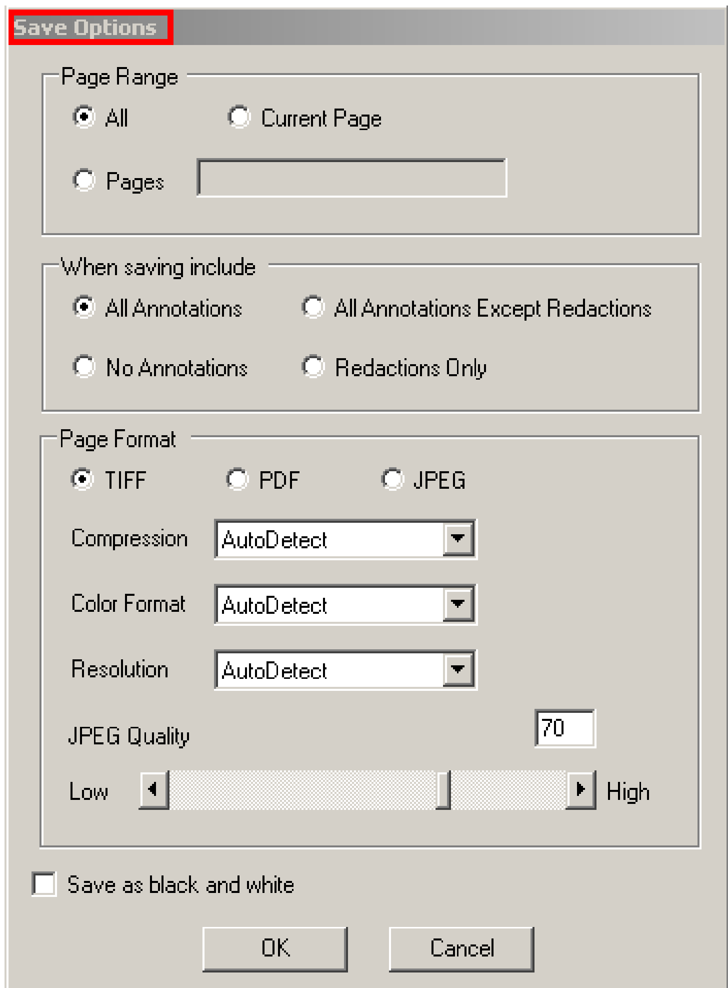
The Save a Copy tool allows Users to save an electronic copy of a Document from within iSynergy to a user-specified location on a workstation or network.

To save a copy of a Document, follow these steps:

1. Select **Save a Copy**.

Note: This will activate the Save Options dialog window.

2. Select the desired Page Range and saving inclusion options, and page format settings in the Save Options dialog window.



3. Click **OK**.

4. Browse to the desired location to save the file, type a name for the file in the File Name filed, and then click **Save**.

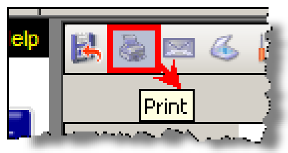
5. A copy of the Document is saved to the specified directory.

Print

The Print function allows Users to print a hard copy of Document(s) from within the iSynergy application.

To print a Document, follow these steps:

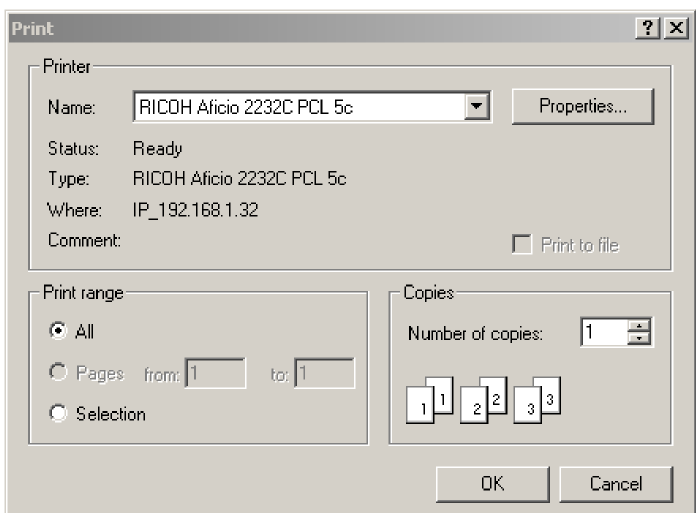
1. Select Print



Note: The Print dialog window displays.

2. Selecting the desired printer and other print options,

3. Click **OK**.

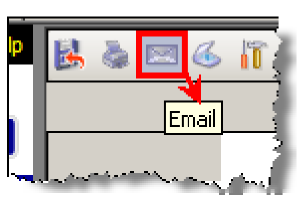


Email

The Email function allows Users to send an electronic version of Document(s) from within the iSynergy application to a recipient via email.

To email a Document, follow these steps:

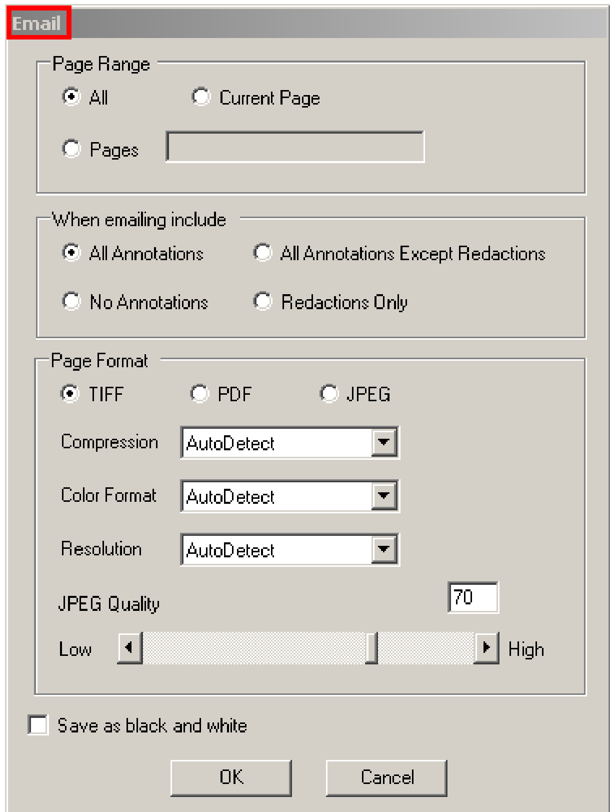
1. Select **Email**.



Note: This Email dialog displays.

2. Select the desired Page Range and emailing inclusion options in the Email pop-up box.

3. Click **OK**.



4. Enter the recipient email address in the **To** field. The **Subject** line may be changed and additional text entered in the message area.

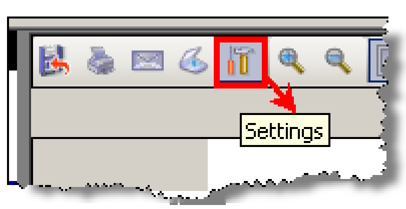
5. Click **Send** when the message is complete. This will email the Document(s).

Settings

The Settings function allows Users to choose printing and emailing options for Documents within iSynergy.

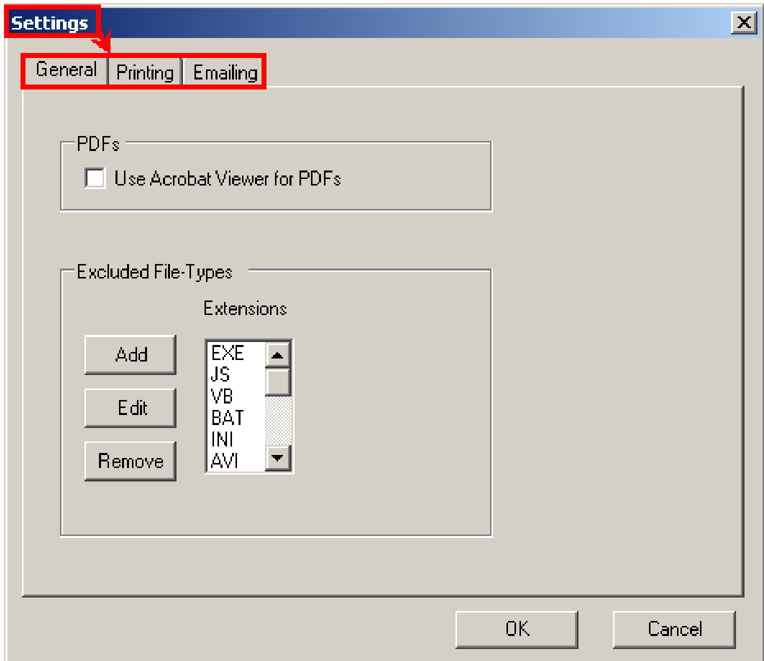
To view and modify settings, follow these steps:

1. Select **Settings**.



Note: The Settings dialog window displays.

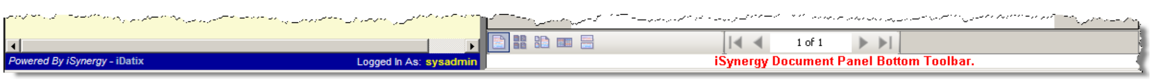
2. Select the desired options from the General, Printing and Emailing tabs.

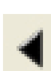
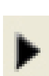


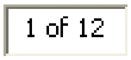
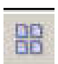
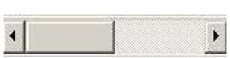
3. Click **OK**.

Bottom Toolbar

This bottom toolbar contains the thumbnail/book view and the page scroll and displays each time the Document Pane displays.



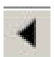
Element	Description
First Page 	Navigates to the first page
Previous Page 	Navigates to the previous page
Next Page 	Navigates to the next page

Last Page 	Navigates to the last page
Page Counter 	Identifies the current page in the Document If a page number is entered in this region, the viewer will go to the page number entered.
One Page View 	Sets the viewer to a single page view
Thumbnail View 	Sets the viewer to a thumbnail view
Thumbnail and Page View 	Splits the viewer into a thumbnail preview pane and single page view pane
Book View 	Allows for two pages to be displayed on the screen either horizontally or vertically
Top and Bottom View 	Displays the upper and lower portions of the Document
Scroll Bar 	Allows scrolling through all pages of the Document

FullText Buttons

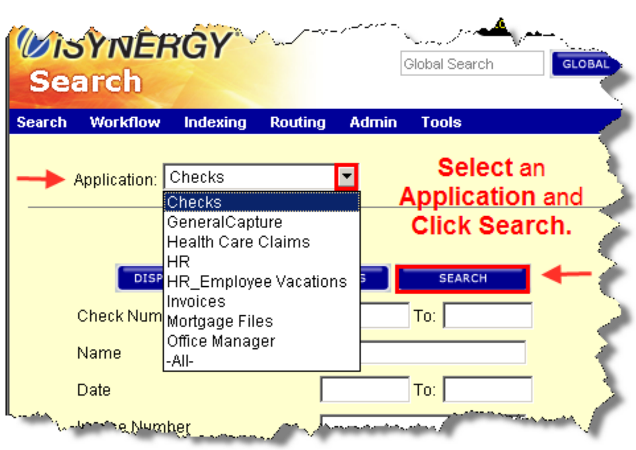
The FullText buttons are located within the Top Toolbar of the Document Pane. These buttons only display following initiation of a FullText search, otherwise they are absent from the top toolbar.

Element	Description
Find	Used to search for specific text within a Document

Element	Description
	
FullText	Displays the content of words found in the OCR process
	
Hide Highlights	Removes highlighting from words identified in the search
	
Previous Highlighted Word	Navigates to the previous highlighted word
	
Next Highlighted Word	Advances to the next highlighted word
	

The first time the Document Pane loads, (prior to a search) it contains no Document and is empty. To display a Document in the Document Pane, follow these steps:

1. Select an **Application**.
2. Select **Search**.



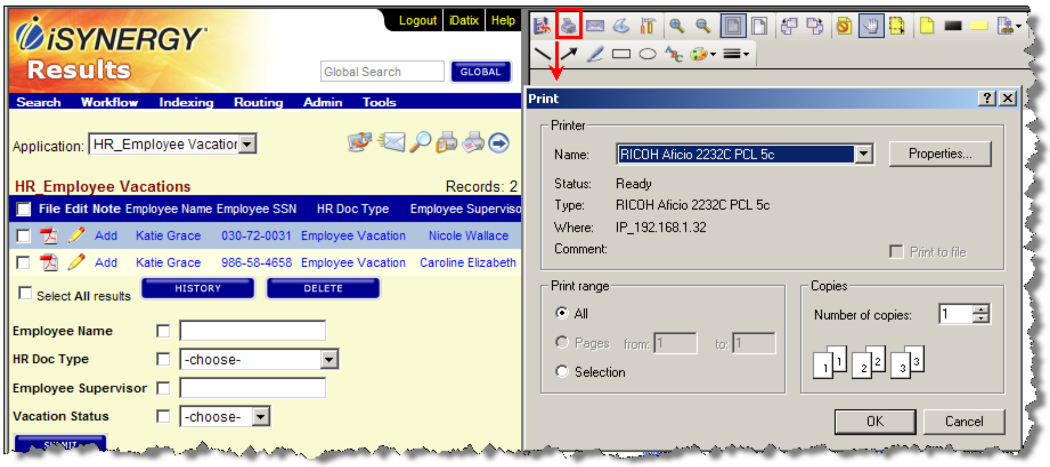
This submits an unspecific search that will return all files in the selected Application to the Results page. The Results page contains a Results table that lists the Indexed Documents. By default the Document Pane displays the first Document listed in the Results table.

Scanning

Scanning is the process of converting paper Documents into electronic formatted Documents. When converted, an electronic Document becomes an image file with the extension TIFF (Tagged Image File Format). This process of converting paper Documents to digital Documents typically uses high performance, production-oriented scanners that can process from 15-200+ pages per minute. iSynergy can route, store and manage converted TIFF Documents.

Print

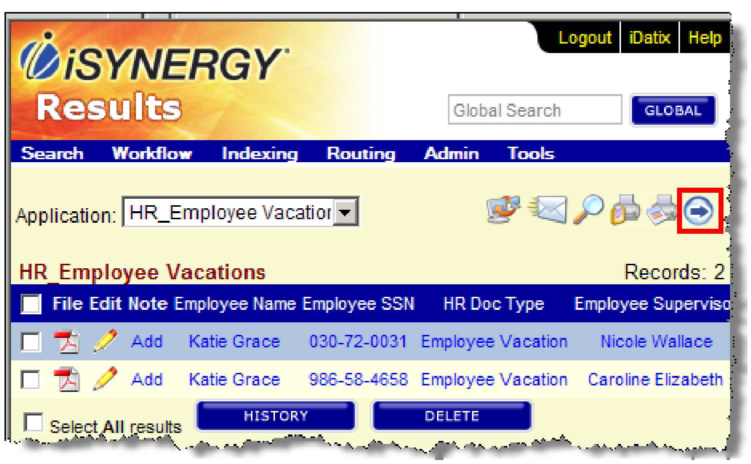
The Print option prints all selected Documents shown on the Results page. Documents selected to print are sent to printers defined on the iSynergy web server.



Toggle Full Screen

This option toggles the Results page to a full screen allowing tables with large amounts of data to be viewed more easily.

Clicking on this option when the arrow points to the left returns the view of the Results page to standard size.



Note: For a complete understanding of iSynergy's search capabilities, please refer to the Searching for Documents section of this manual.

Application Management

An Application in iSynergy is the virtual equivalent of a traditional physical filing cabinet or shelving system. These filling cabinets are analogous to the filing cabinets within the major divisions in your company. Whether you store your documents in a filing cabinet or electronically in iSynergy, the indexing and search retrieval are conceptually the same

> *For example, Accounting, Operations, Insurance and Human Resources all have a filing cabinet where they keep documents important to their department. People in the Insurance department do not file their documents in the same cabinet as Human Resource department.*

An iSynergy application can be used as a simple archive for documents post processing and is most often the starting point for application implementations. Starting with a back-file conversion project is a good way to develop experience and a comfort level with the new solution, but does not provide the greatest benefits to the business. Moving the capture processes to the front-end instead of the back-end leverages the benefits of document management and provides the capabilities for true process automation.

By capturing documents and content at the front of a business process at the time of receipt, you eliminate many labor-intensive activities and instantly eliminate risks such as lost documents as you perform the tasks that make up your work process. You enhance information access, process tracking, process flexibility, compliance, quality and overall throughput. This is because documents and content are routed through the process electronically without the need for handling and moving physical files, making copies or being limited to a linier process.

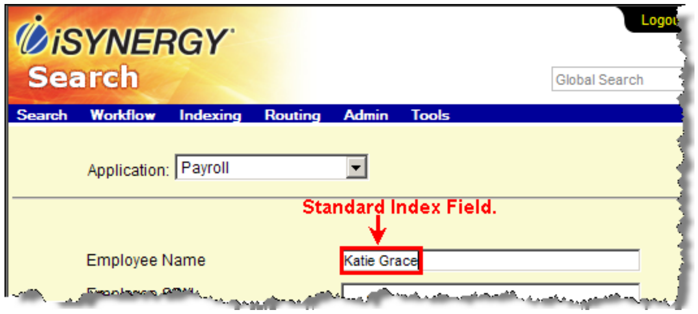
The Application structure in iSynergy is configurable to comply with all the organizational needs of the enterprise, which makes managing Applications in iSynergy straightforward and simple. To realize the full potential of iSynergy's storage and retrieval functionality, careful thought and planning must be given to the development of your Applications.

> *Note: Please review iDatix sample Best Practices Application Configuration worksheet in Appendix A and/or the iDatix Configuration Guide for further details.*

In following sections, we will examine the different elements of an iSynergy Application structure in detail and describe how to construct an effective application.

Index Fields

An Application foundational element is the Index field, which is used to assign identifying characteristics, or index values, to a Document stored in the iSynergy Repository.



Note: An index value is a data value in the iSynergy repository that helps to identify a Document within iSynergy. Additionally, index fields are entry fields to assign values for indexes and must comply with database standards. To help insure standards are met, Index values are assigned specific attributes known as Index types.

iSynergy relies on indexes to file Documents correctly. These indexes correlate to labels on a file folder. When first creating an iSynergy application, the indexes you choose should be the same as the filing procedure in the office.

Note: iDatix Client Support Services recommends the following core index values for an iSynergy Application:

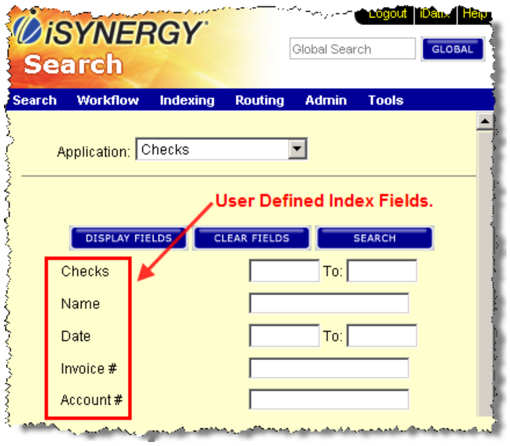
- ID Number.
- Name.
- Date.
- Document Type.
- Status.

Each of these generic indexes can be translated to an industry, department or application specific term.

Note: It is important when communicating with the potential users of the new iSynergy Application to use the specific term and not the generic term. This provides the user with the context necessary for them to identify with the application and to gain a quick understanding of how it applies to their own personal job function.

User-Assigned Index Fields

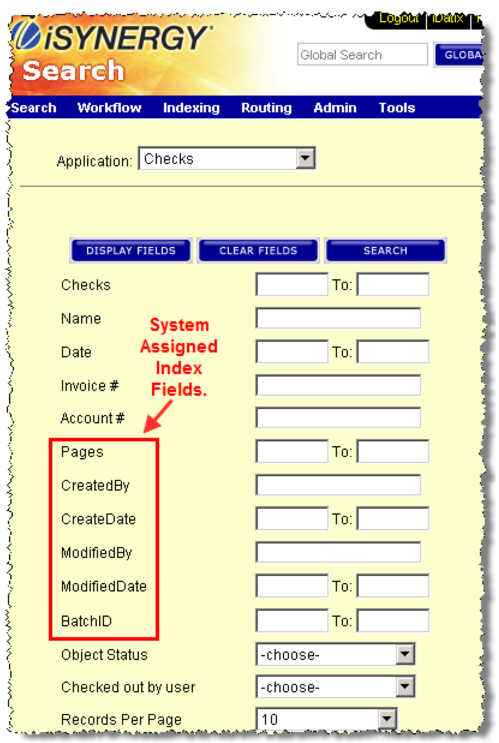
The System Administrator defines User-Assigned Index Fields for each Application. These Index fields vary with each unique iSynergy Application.



Note: For example, the Checks Application may have a unique Index field, such as Purchase Order, while Human Resources may have a unique Index field for Social Security Number. User-Assigned Index Fields are used primarily to search and retrieve Documents from the iSynergy repository.

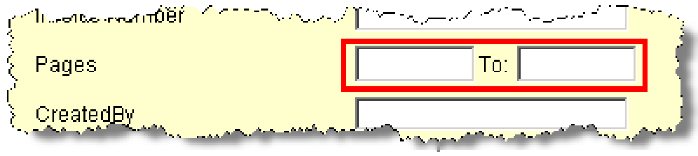
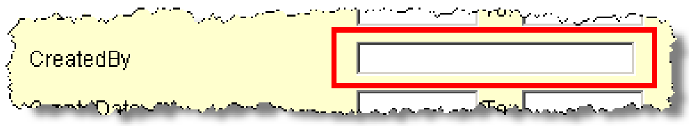
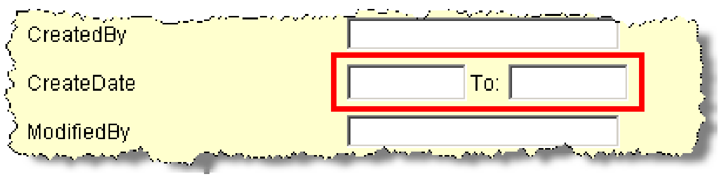
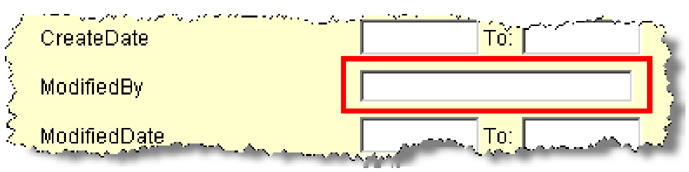
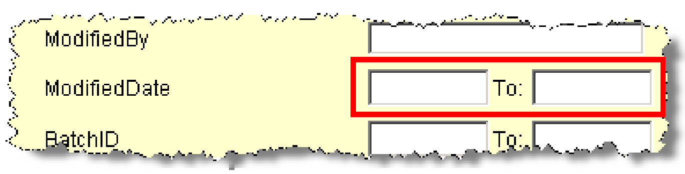
System Assigned Index Fields

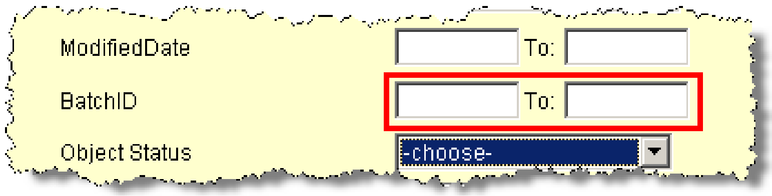
By design, each iSynergy Application has System-Assigned Index fields. These index fields contain values used by the iSynergy Repository to track events and changes in the status of objects stored in iSynergy.



Note: Report generation and various system administration tasks make use of these values.

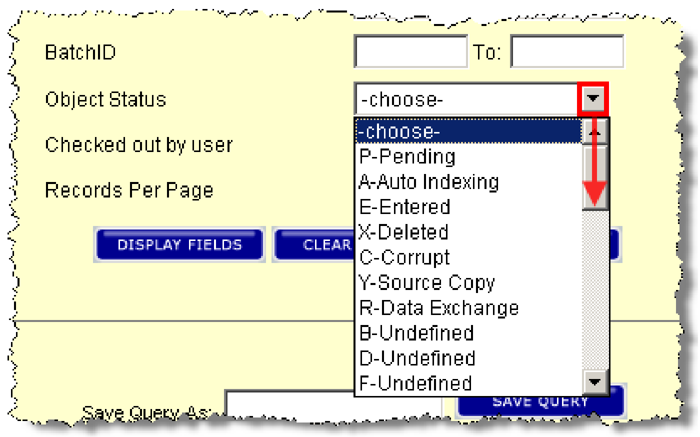
The following table lists the System Assigned Index Field names and descriptions:

Element	Description
Pages	Provides the ability to search within a range by the number of pages contained in the submitted document. 
CreatedBy	Provides the ability to search by the name of the user who originally submitted the Document to iSynergy. 
CreateDate	Provides the ability to search by the date within a range that the Document was originally submitted to iSynergy. 
ModifiedBy	Provides the ability to search by the user who made the most recent modification to a submitted Document. 
ModifiedDate	Provides the ability to search within a range by the date the Document was most recently modified. 
BatchID	Provides the ability to search within a user defined range for a document's identification number. When utilizing any of the iDatix capture products, a unique batch ID is created and associated with the Document.



Note: Each document that is submitted to iSynergy receives a unique batch ID. The object ID in the repository denotes the object, where as the batch ID denotes the Documents that are submitted.

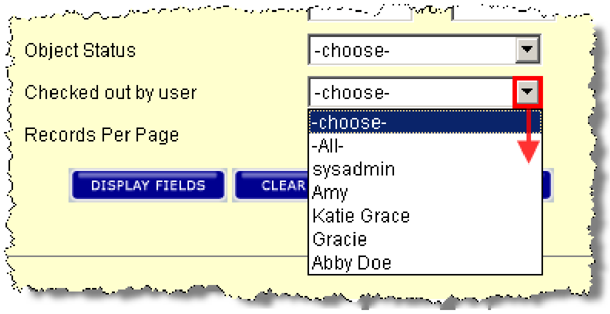
Object Status Provides the ability to choose a search the status of an object within iSynergy from a drop down menu.



Hard Coded Object Status Codes

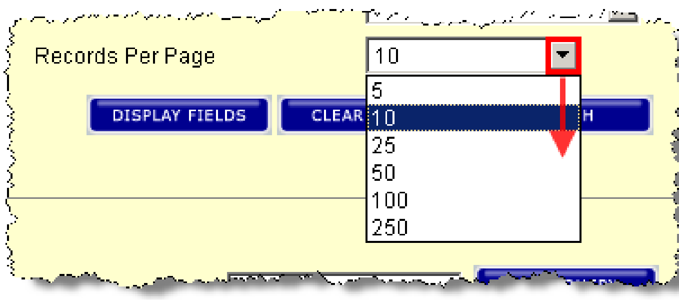
- **E**: Searchable Documents (Display in the result set for a search in the system).
- **P**: Manual Indexing (Display in the Manual Indexing screen for user intervention).
- **I**: Routed to Inbox (Documents routed to an individuals or groups inbox).
- **X**: Deleted (Documents that have been soft deleted).
- **C**: Corrupt (Documents that have been determined to be corrupt or of incorrect resolution).
- **Y**: Source Copy (Large multi-page TIFF files that have been separated into smaller sections are retained).

Checked Out by User Provides the ability to search for a document by choosing a user from the drop down menu.



Note: The Checked Out by User field is only displayed if at the application level, Revision control settings are selected.

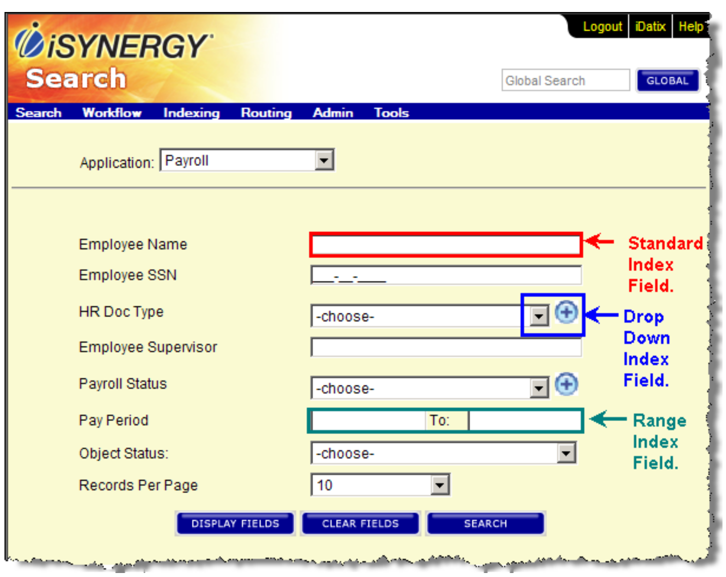
Records Per Page Provides the ability to define the number of displayed records per page.



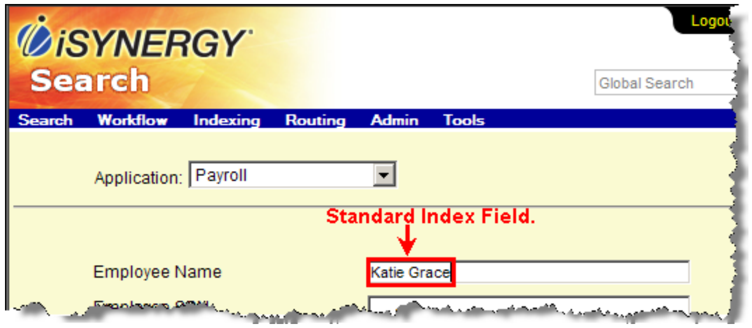
Index Field Formats

Index Fields allow you to enter values for a search. There are three types of index field formats:

- Standard.
- Drop Down Menu (UDL's).
- Range (Numbers and Dates).



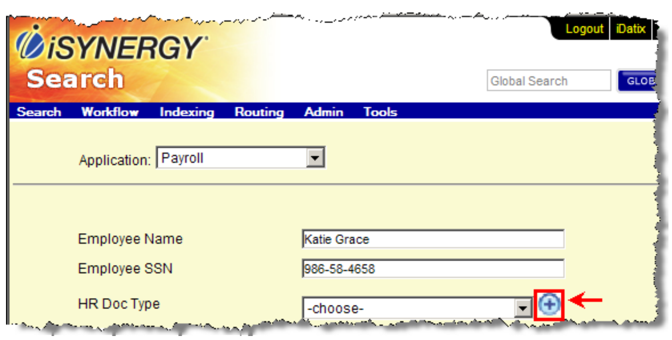
To use a standard index field, simply type in the appropriate information.



The drop-down menu allows you to choose a single index value. Simply, select the drop down arrow and choose an index value from list.

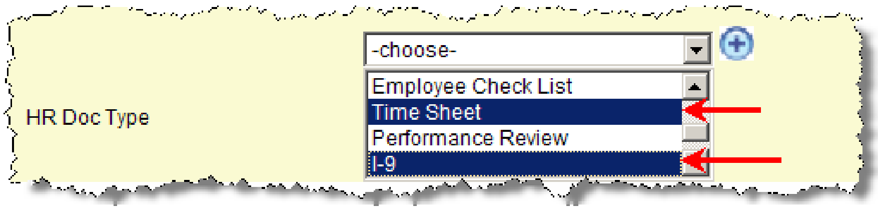
Additionally, to select more than one value from a drop-down field:

1. Select the **Plus Icon**.

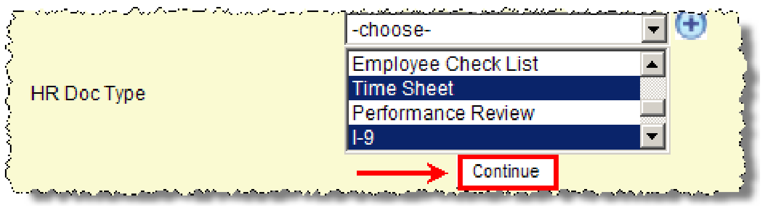


Note: A pane for the selected index type displays the available index values.

2. On your keyboard, select the **Ctrl** key and choose the appropriate **Multiple Indexes**.

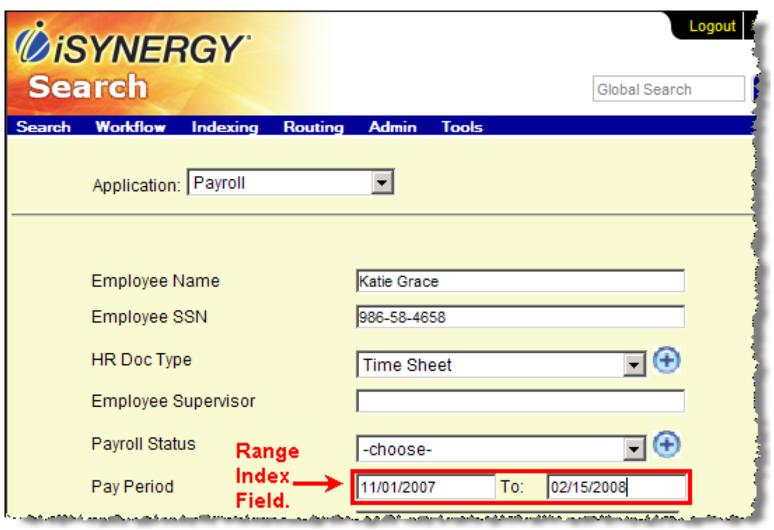


3. Select **Continue**.



The range field format applies to query strings composed of numbers or dates. To use a range field, enter two numbers that represent a range of numbers or dates within which you wish to search.

> *Note: Unless otherwise indicated by your System Administrator, the Date Range must be in the following format: mm/dd/yyyy.*



> *Note: You are required to specify a full range with a range query. However, to search on a specific number or date, fill in only the first field and leave the second field empty.*

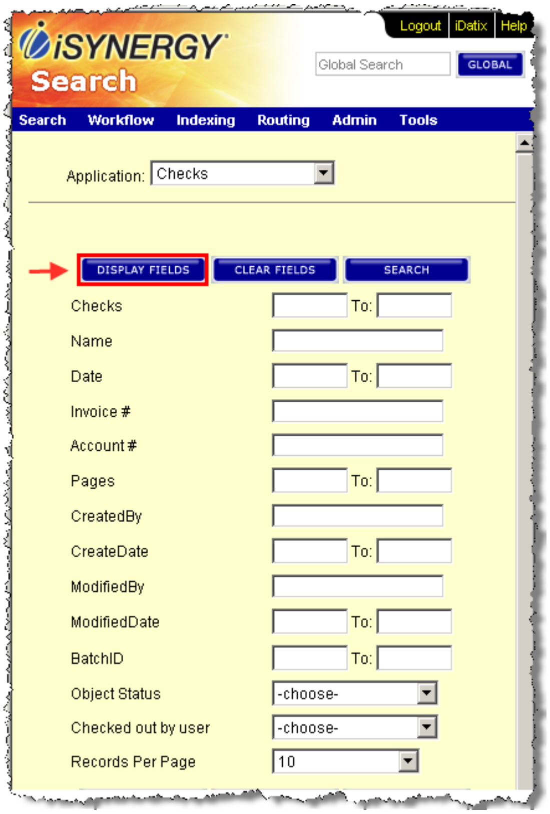
Display Fields

The Display Fields functionality allows a user to modify the displayed Index fields on the currently selected Application Search page, as well as the Results page.

> *Note: Display Fields settings are Application specific, as well as specific to the logged in user.*

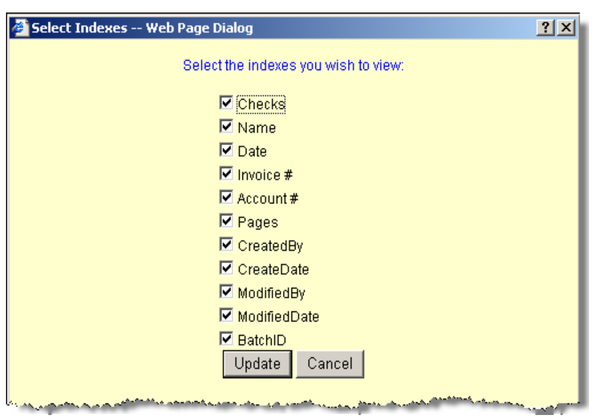
To modify which fields display on both the Search page and Results page for the current Application, follow these steps:

1. Select **Display Fields.**



Note: The Selected Indexes dialog displays.

2. Only **Check** the **Index** F**ields** you want to display.



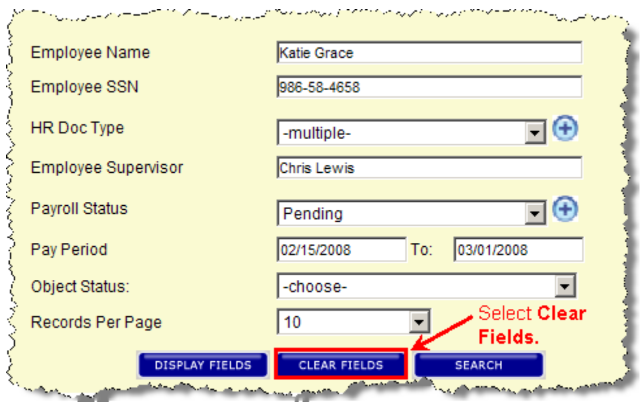
3. Select **Update**.

4. The current Application now displays only the Index fields selected.

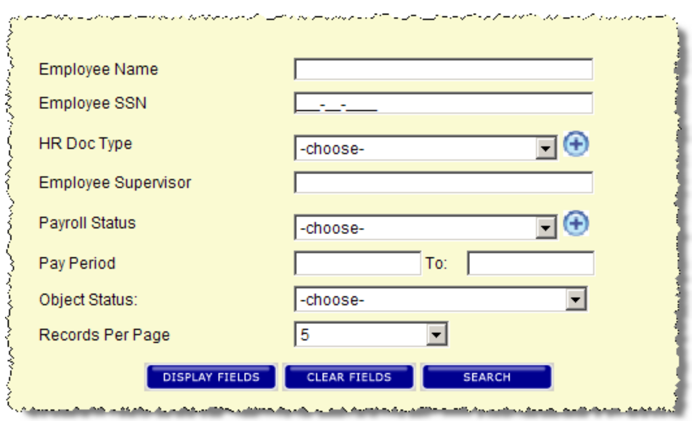
Clear Fields

This option provides a simple way to remove all search criteria previously entered by the user.

1. Select **Clear Fields**.



2. The data contained in each respective index field is removed.



Index Types

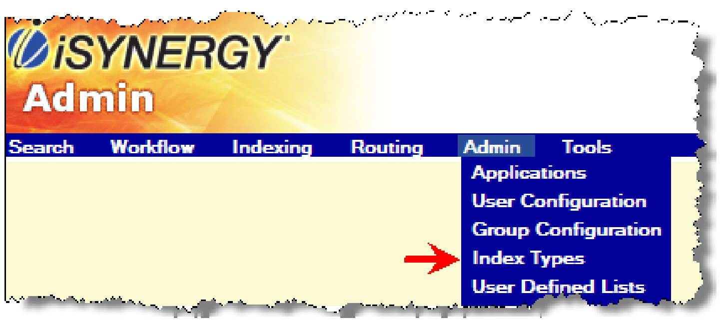
An Index type is composed of a set of attributes that allows storage of values or records, in a database that comply with ODBC standards. Index Types are user defined and provide the ability to restrict the type of data that can be added for a particular type of field. Furthermore, formatting and masking can be set when defining the index types.

For example, you can use the Zip index Type or the Zip + 4 Index Type to standardize the way a user inputs the zip code for the business process.

By design, iSynergy contains pre-defined index types such as address line, company name, first name and social security number, as well as many others. These Index Types are designed to simplify your application definition process.

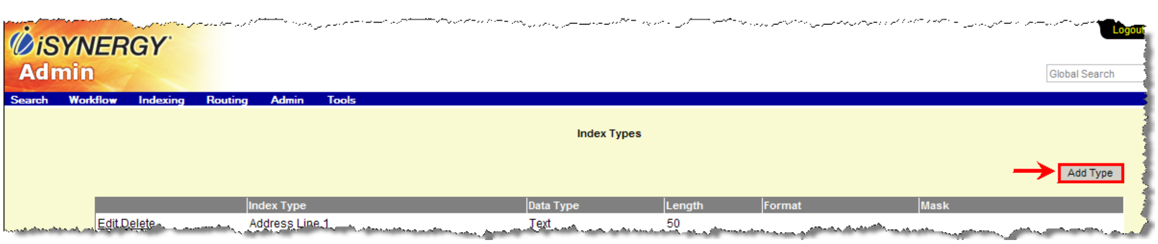
To view, edit and delete an iSynergy Index Types follow the below steps.

1. Navigate to the **iSynergy Menu Bar**.
2. Select **Admin>Index Types**.



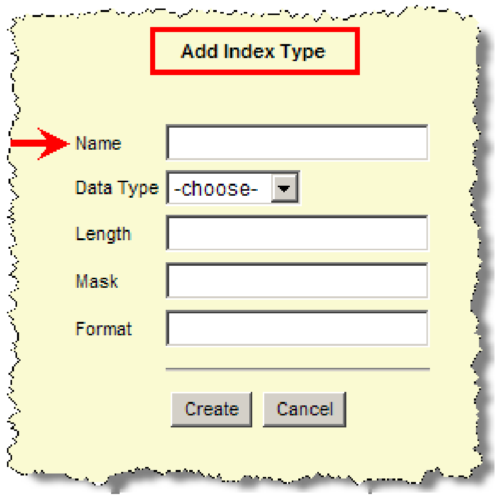
Note: The Index Type dialog window displays.

3. Select **Add Type**.

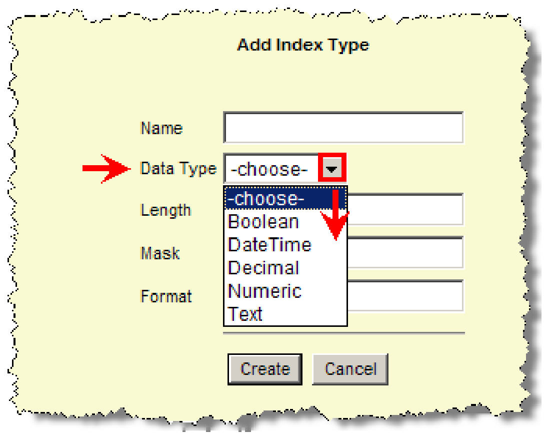


Note: The Add Index Type dialog window displays.

4. Define the **Index Type Name**.

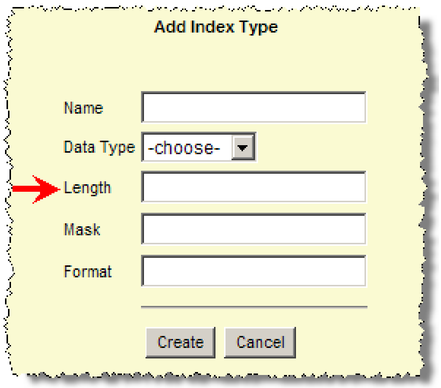


5. Navigate to **Data Type** and select the **Drop Down** Menu.



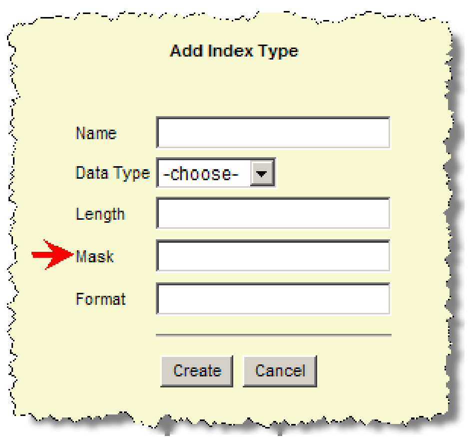
Element	Description
Boolean	Provides the ability to define an index data type where the values are either True or False.
DateTime	Provides the ability choose an index data type where the values are defined with a date and time.
Decimal	Provides the ability to choose an index data type where the values are defined by a floating numeric value point.
Numeric	Provides the ability to choose an index data type where the value is a numeric integer.
Text	Provides the ability to choose an index data type where the values can be either characters or numeric integer.

6. Tab to the **Length** text field and define the character length.



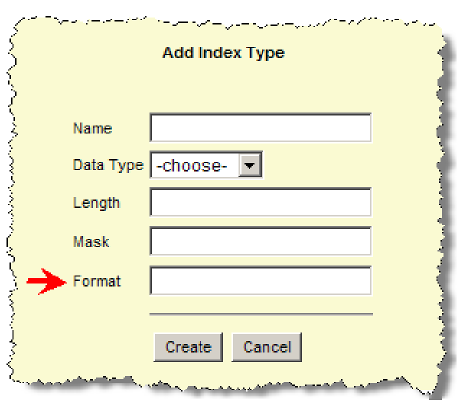
Note: The Length text field denotes the maximum length of characters and spaces an Index Value can hold For example, if the Data Type is Text, the Length might be 25.

7. Tab to the **Mask** text field and define the mask.



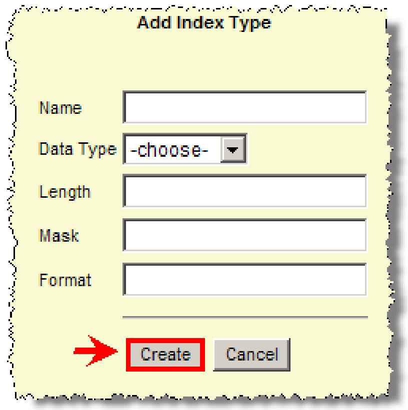
Note: A Mask is a filter that selectively includes or excludes certain values. For example, when defining a database field, it is possible to assign a mask that indicates what sort of value the field should hold. Values that do not conform to the mask may not be entered.

8. Tab to the **Format** text field and define the format.



Note: The format text field provides additional control and functionality to index types. For example, if you use the DateTime Index type, you can specify United States style display (mm/dd/yyyy) or European style display (dd/mm/yyyy).

9. Select **Create**.



Note: An Index Type has been created and will be available for the use within an Application.

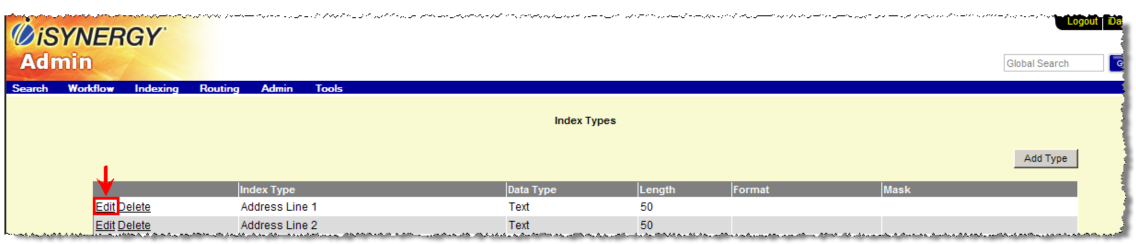
Editing and Deleting an Index Type

To edit an index type, follow the below steps:

1. On the iSynergy Menu bar, select **Admin>Index Types**.

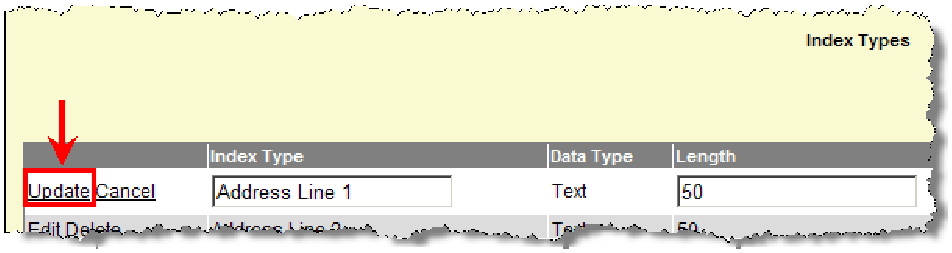
   Note: The Index Types dialog window displays.

2. Navigate to the far left column and select **Edit**.



3. Navigate to the Appropriate Index Value and make the appropriate changes.

4. Select **Update**.



Note: Selecting Cancel will not save your changes.

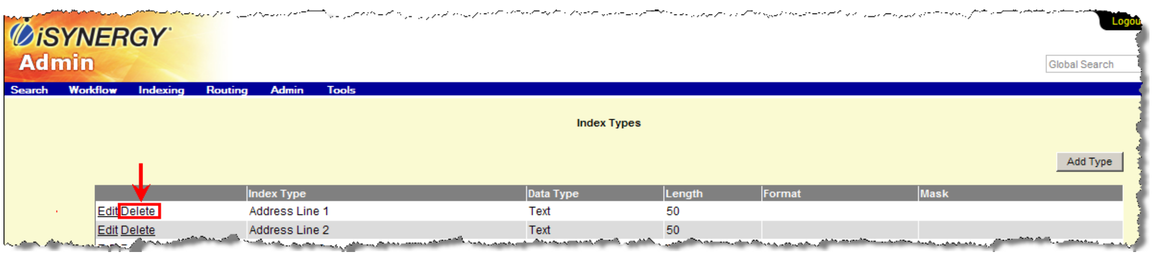
5. The Index Type has now been modified and updated in the Repository.

To delete an index type, follow the below steps:

1. On the iSynergy Menu bar, select **Admin>Index Types**.

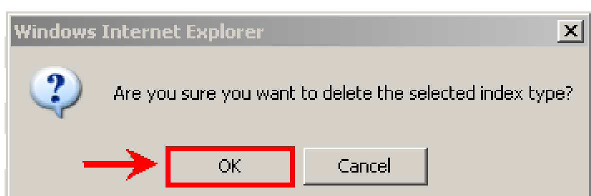
   Note: The Index Types dialog window displays.

2. Navigate to the far left column and select **Delete**.



Note: A Windows Internet Explorer dialog window displays confirming you want to delete the selected index type.

3. Select **OK**.



Note: Select Cancel to close the Windows Internet Explorer dialog window and keep the index type.

4. The index type is removed from the Index Type dialog.

User Defined Lists (UDL)

iSynergy utilizes both Index Fields and UDLs.

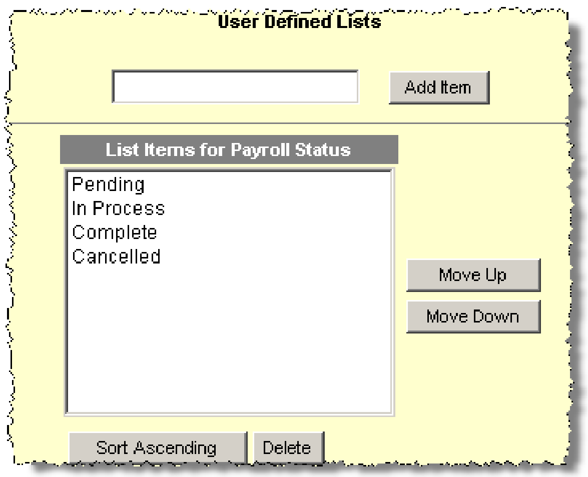
The UDL is displayed in a drop down menu that is created by the administrator when setting up the iSynergy Application. An Index Field is an object that accepts an index value entry. iSynergy

UDL's accept index values in the form of a list. Each list as defined by the user, contains common items that can be used across multiple applications or is specific to a singular application.

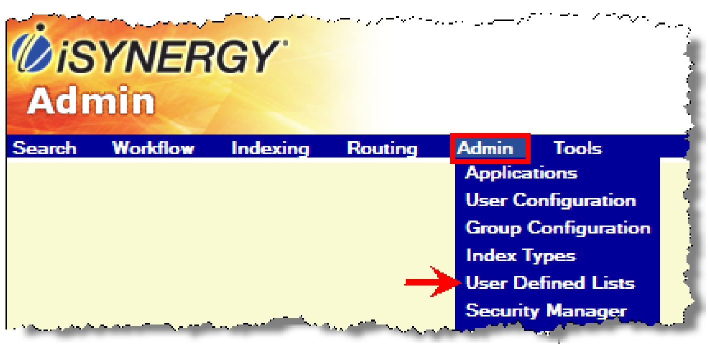
UDLs provide the ability to improve Document search accuracy while simultaneously minimizing data entry errors.

For example, you may have a status type UDL which contains generic document types for process. The HR Application might have a Pending, In Process, Complete and Cancelled UDL.

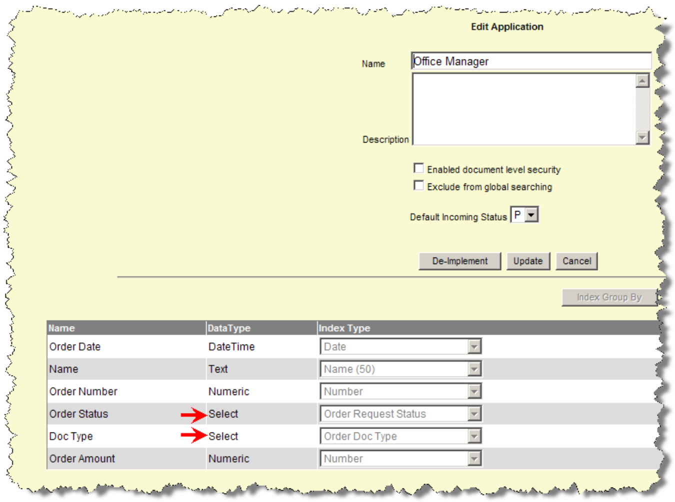
To simplify the workplace, if you can reuse the aforementioned status in the Invoices Application you might have an application– you are in effect utilizing one UDL that will further drive the ad-hoc workflow ability within iSynergy.



UDLs are defined and available for viewing, by navigating to the iSynergy Menu Bar and selecting **Admin>User Defined List**.



Note: A UDL is automatically included in the default list of Index types and is assigned a data type of Select. All UDL columns contain a Null selection, which is a system-assigned Index value. If an Index field is not a required field and if left empty by the user, the Document will be assigned a Null Index value.



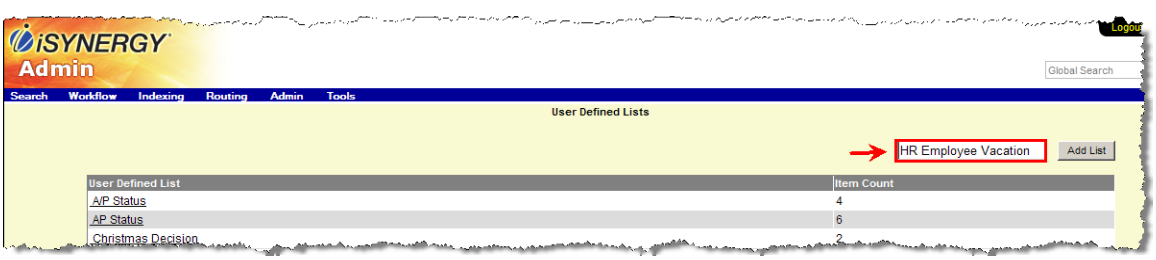
Furthermore, UDLs are static lists that cannot be added to by the end user while indexing a document.

Note: Index types that are contained in a UDL list from an implemented Application should not be deleted or changed because you could potentially disrupt a workflow; however, you can add a new UDL field value to an existing UDL.

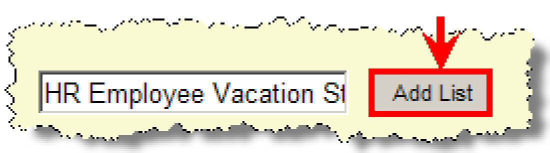
Create a UDL

To create a UDL, follow the below steps:

1. On the iSynergy Menu bar, navigate to **Admin>User Defined Lists**.
2. Navigate to the **Add List** text field.
3. **Name** the UDL.

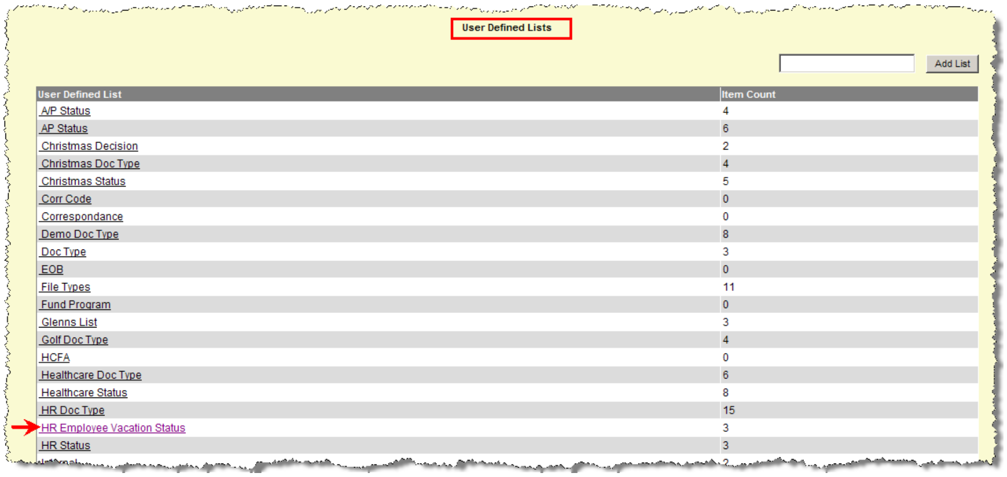


4. Select **Add List**.



Note: Do not use special characters when creating an application in the UDL. These include: ***! $ % ^ & * ( ) + : ; ' < > . , ? / { } [ ] | \ ~ ` " –*** *Certain special characters could unexpectedly cause an unwanted mass update in the database table due to a known MS SQL Flaw called SQL injection. If you would like additional* *information, please contact iDatix Client Support services and/or review the following web site. http://support.microsoft.com/kb/954476*

5. The name of the UDL displays in the User Defined List dialog.



Add a List item to a UDL

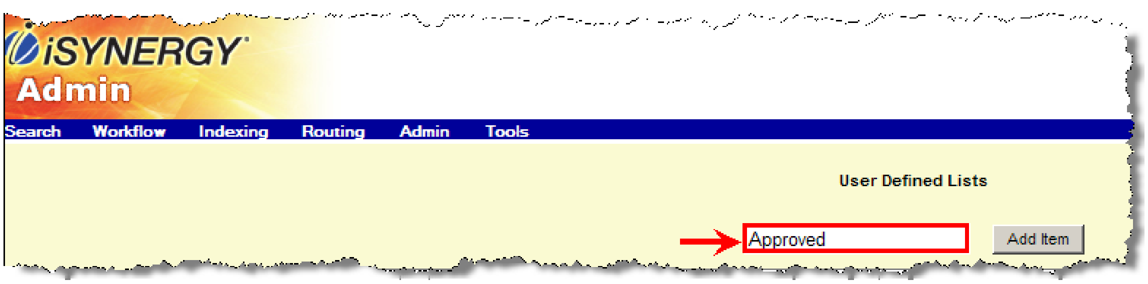
To add one or more list item to a UDL, follow these steps:

1. On the iSynergy Menu bar, select **Admin**>**User Defined Lists**.

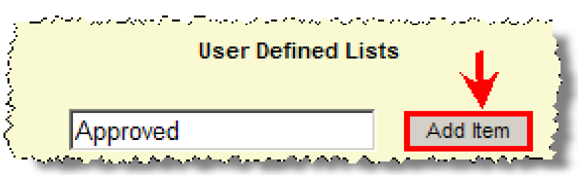
2. Navigate to the UDL you want to **modify**.

   Note: The User Defined List dialog displays.

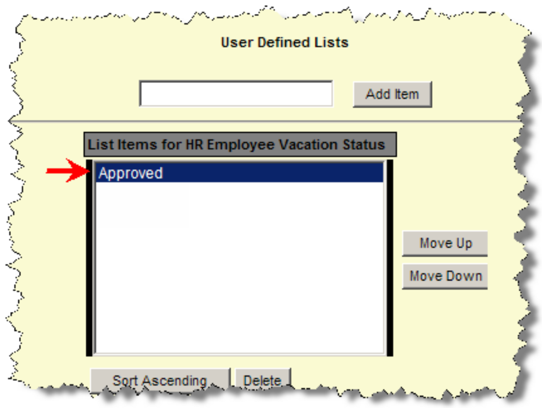
3. Navigate to the **Add Item** text field and enter the name of the Index value to be displayed.



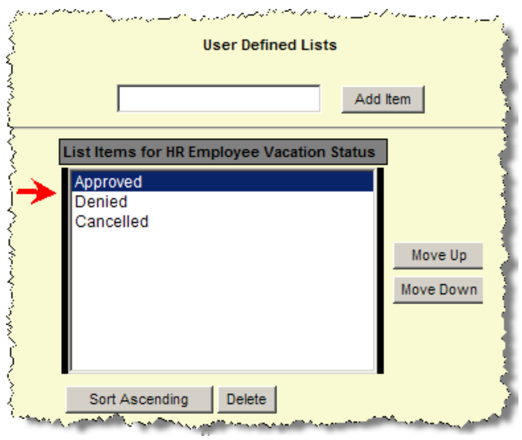
4. Click **Add Item**.



Note: The defined List Value is placed in the UDL pane.

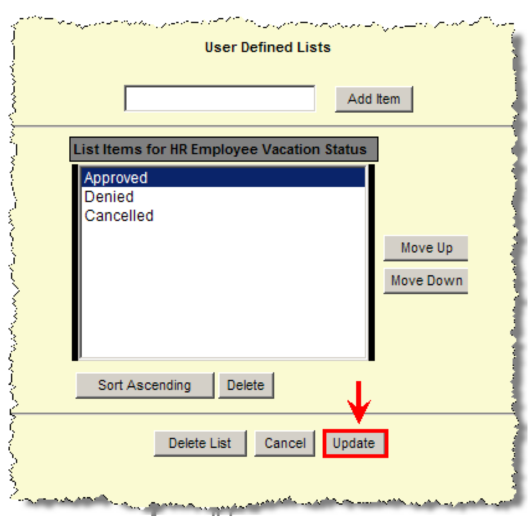


5. Repeat steps 3 and 4 until all list items have been added to the UDL.



Note: To rearrange the list items, select either Move Up, Move Down or Sort Ascending.

6. Select **Update**.



Note: To cancel the UDL list, select Cancel. Additionally, to delete the entire UDL list, select Delete List.

Delete an Item on a UDL

iDatix best practice does not recommend deleting a UDL item in an implemented Application because you could potentially disrupt a workflow and cause database orphans.

This will result in a system generated error; however, if you choose to delete an item on a UDL, follow the below steps:

1. On the iSynergy Menu bar, navigate to **Admin**>**User Defined Lists**.

2. Navigate to the **UDL** you want to delete.

   Note: The User Defined Lists Modification dialog displays.

3. Select the item in the list you want to delete.

4. Click **Delete**.

5. You have now deleted an item in the UDL.

Delete an Entire User Defined List

As aforementioned, once you have created, implemented and began using an application, it is important to remember that you should not delete a UDL list item. If an index value contained in the UDL has been used in any record in the application, deleting an index in the list and/or the complete UDL may cause database orphans. Meaning, if a user accesses the document, iSynergy searches for its' index value and if the UDL no longer has the list item, iSynergy will be confused as to what the item is and execute a system error.

> *For example, if a document has an index value from a UDL of 'Maid in America' and later the UDL is corrected to show 'Made in America', the document can no longer find the original entry and will generate an error. The way to avoid this is to have someone update all database tables that reference the changed or deleted item. The table needs the same entry as the document to prevent the error. If there is no DBA on hand to make the changes, it is advisable to not alter the existing USL items. You can add to the list, but*

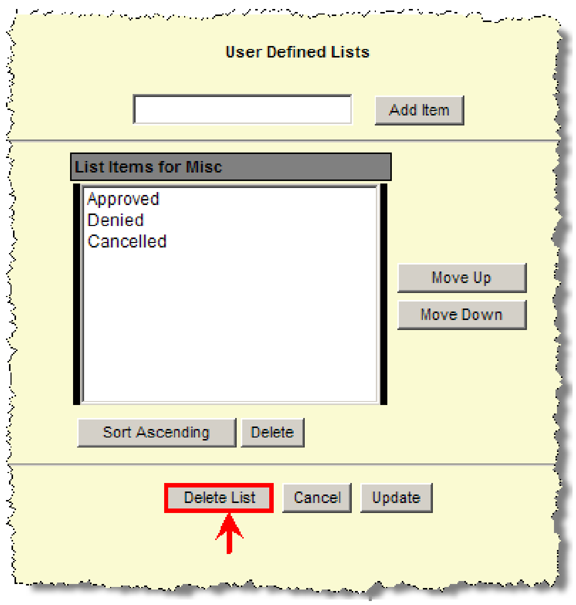
not delete or edit. For additional help, please contact the iDatix Client Support Services department.

To remove an entire UDL, follow these steps:

1. On the iSynergy Menu bar, select **Admin**>**User Defined Lists**.

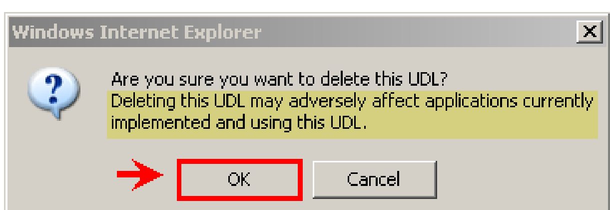
2. Navigate to the **UDL** you want to delete.

3. Select **Delete** List.



Note: A Windows Internet Explorer dialog window displays. Ensure that you read the error message as some applications maybe utilizing the UDL you are deleting.

4. Select **OK**.



Creating an Application

Once you have thoughtfully planned the structure and function of your Application, it is easy to create and implement your Application in iSynergy. Proper analysis and planning combine to ensure effective implementation of Application(s) that meet or exceed intended goals for use.

The standard Application definition requires a minimal set of defined parameters to accomplish the definition process. The fundamental parameters are the index values that will be used to access, search, secure and manage the stored documents. This is also called the meta data.

iSynergy allows for a practically unlimited number of index values per iSynergy Application (Virtual Filing Cabinet). Each index can be completely customized to meet the need of the documents and processes being automated. Again, the core index values are:

- ID Number
- Name
- Date
- Document Type
- Document Status

You will find that there is a common theme when defining indexes for iSynergy. You just have to ask yourself what am I looking for and how do I want to be able to find it. If you think about most filing solutions they are organized by a number in numerical order or by a name in alphabetical order. In the real paper-base environment, if you wanted to store a document by both methods, you would have to copy the document and store it in two different files. iSynergy allows you to do this without the need to make a copy and without the labor to manage two different filing systems. You simply name both items as index values in the Application definition and the document can be retrieved by searching using either value.

iSynergy uses a simple status value to represent where work is in the process. The Status values are defined as a User Defined List (UDL) of possible work steps or process tracking values such as: Pending, Waiting for Approval, Approved, Denied and Completed.

Note: For more information, please review the UDL section of this manual.

As work is captured into the iSynergy Solution the status value is set to pending to initiate the workflow process. Each worker may execute a search in iSynergy to find work that needs to be completed in a given status and then save the query; thus simplifying the search process and automating the method of getting work by the user.

Document arrives and is scanned into iSynergy. Document Status is set to "Awaiting Approval."

Department Manager searches for all documents with "Awaiting Approval" status. The Manager changes the status to "Approved for Payment" or "Rejected" as applicable

Accounting personnel searches for all documents with "Approved for Payment" status to pay those bills. Accounting Personnel then changes the Document Status to "Paid."

Often it in necessary to assign work to a specific user or team. This can be done by creating an Assign To index value to help drive the ad-hoc process. Used with the Status index values you can control the flow of documents and content through the defined business process to specific user or team. Thus, the user of iSynergy can send work to the accounting manager for approval. After approval, the accounting manager can send the work to the payment department for payment or back to the submitter for additional information.

Ad-Hoc workflow is a user driven process and is dependent on the user's ability to correctly assign the index values at the end of their task to have the work move to the next task in the process. There is no process enforcement. There are also no business rules. Ad-Hoc workflow does not provide functionality for "if". If would imply asking and processing a question and that is a business rule. Such as, "If the amount is greater than $1000 then send it for approval". Ad-Hoc workflow is driven by user knowledge and action and does not process or enforce rules.

Basic Ad-Hoc workflow is included with the base iSynergy product suite. Progression can enforce business rules and processes and gives the user the ability to use a graphical tool to design a business process application without the need for programming.

Note: For further example and documentation on workflow status, please review the Progression Advanced User Manual.

Below is a quick reference for creating an application.

Note: For the complete application checklist, please review Appendix 1.

When creating an Application, it is highly recommended that you follow these steps.

1. Create new **Index** types (if required).

   Note: iDatix best practice for index values are no more than five; however, this will vary slightly up or down based on the needs of the end user and the particular process.

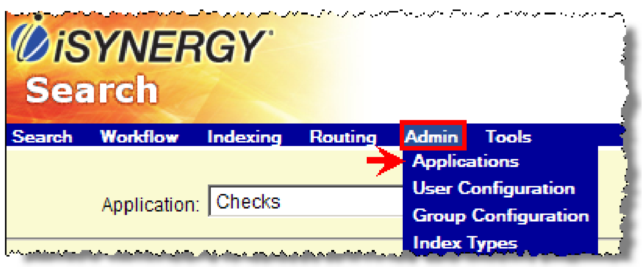
2. Create **UDL**s.
3. Create the **Application**.
4. **Add Indexes** to Application.
5. Select **Implement**.

Create a new Application

To create a new Application in iSynergy, follow the below steps:

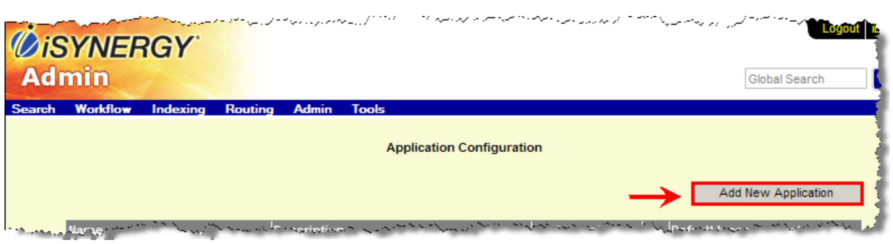
Note: The following instructions assume that Index Type(s) and UDL(s) have been successfully created. If not, instructions on creating Index Types and UDLs are discussed previously in this Manual.

1. On the iSynergy Menu bar, navigate to **Admin>Applications**.



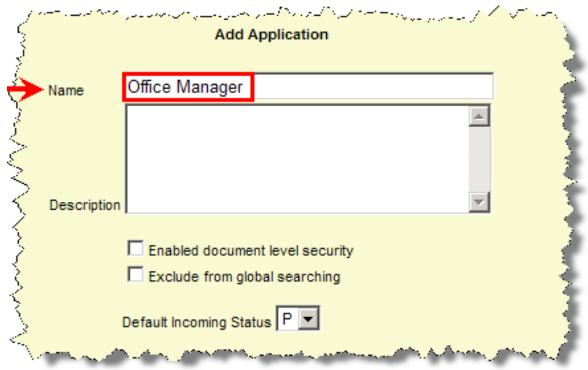
Note: The Application dialog window displays.

2. Select **Add New Application**.



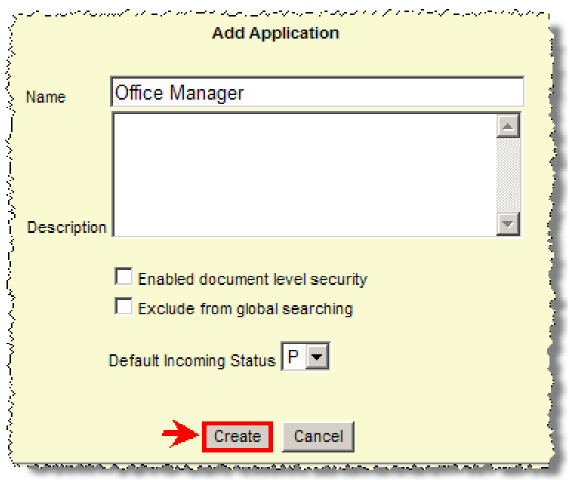
Note: The Add Application dialog window displays.

3. Enter the **Application** name.



Note: If applicable, tab to the Description Pane and define a description for the named Application. Additionally, if you want the Application to have Document level security and/or be excluded from Global searching, select the appropriate checkbox. Finally, by default, all newly created Applications are assigned the P status. For more information regarding iSynergy status, please review Appendix 2 – iSynergy Statuses.

4. Select **Create**.



Note: If an Application is implemented, the Implemented column on the Application Configuration is listed as True. If the Application is de-implemented, the column value is listed as False.

5. You have now created an Application and you can begin adding indexes.

Deleting an Application

To delete an application, follow the below procedure.

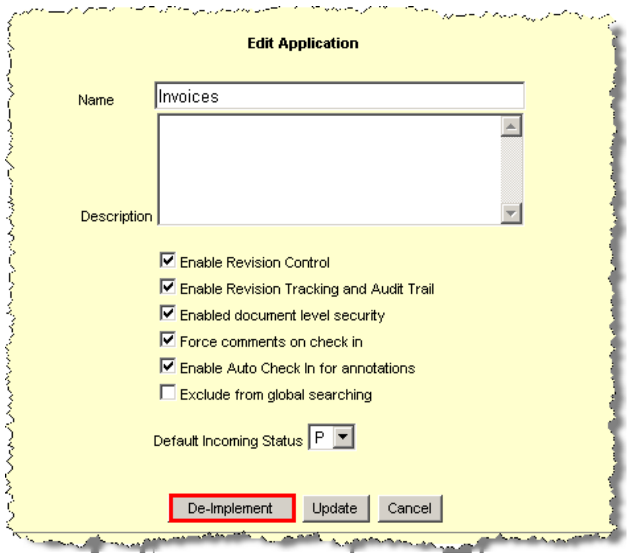
Note: When you delete an entire Application, the associated work items and documents are also deleted.

1. Navigate to **Admin>Application**.

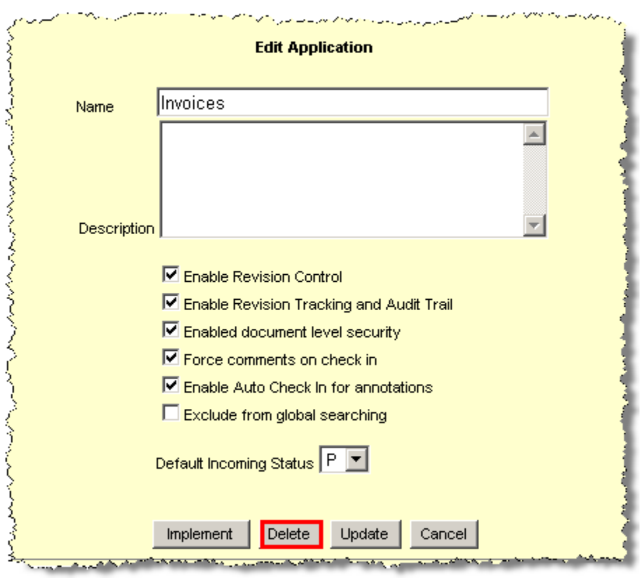
2. Select the **Application** you want to delete.

   Note: The Edit Application dialog displays.

3. Select **De-implement**.

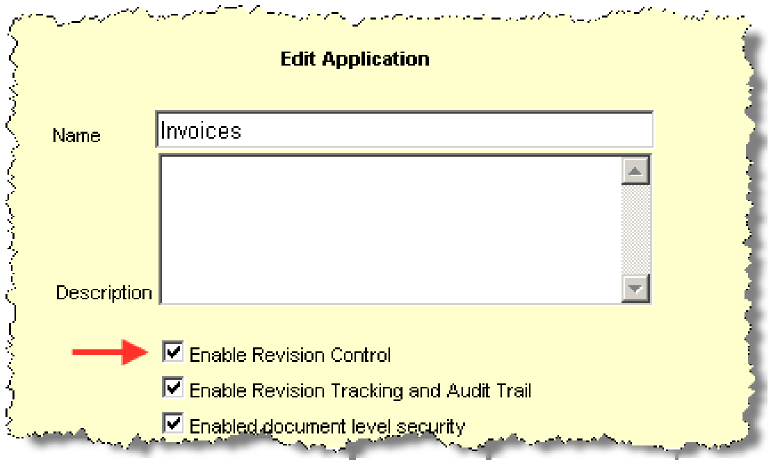


4. Select **Delete**.



Enabling Revision Control

Revision Control provides the capability to retain a history of older versions of documents. The revision control feature can be configured for specific application cabinets and at several degrees of retention.



Revision control provides the ability to manage multiple revisions of a document. iSynergy offers this robust functionality so that you may simply your workplace through a one stop shopping and management for all your documents. Enabling Revision Control provides the ability to manage multiple versions of a document contained within an Application.

> *Note: Revision Control functionality has additional features that can be used to tightly control the document management process. Please see the below sections for additional information.*

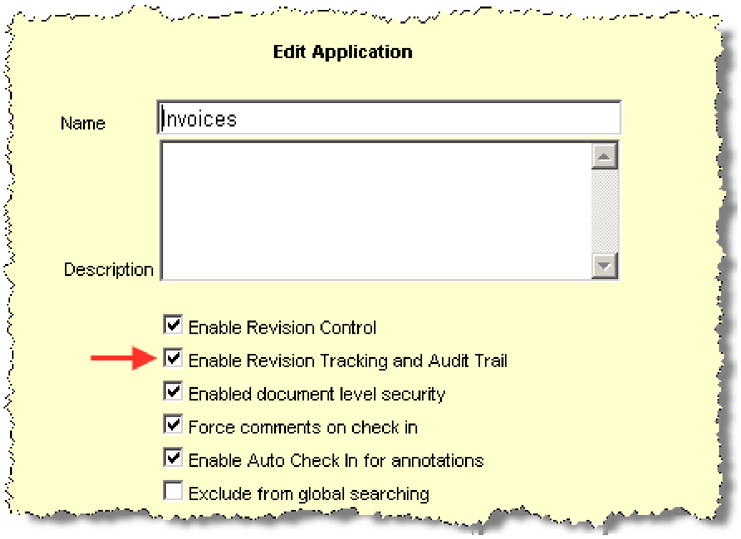
1. On the iSynergy Menu bar, select **Admin>Applications**.

> *Note: If you have created the application, simply select and modify it. If you have not created the application, select Add Application.*

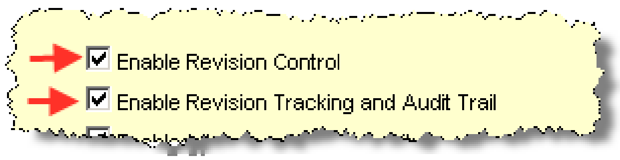
2. Select **Enable Revision Control**
3. Continue creating or modify the Application.
4. Select **Update**.
5. When you are finished, select **Implement**.

Enabling Revision Tracking and Audit Trail

The Revision Tracking and Audit Trail option provides the ability to track the document versions.



Note: This is an application setting and will only be available if Revision Control is enabled.



Utilizing both Enable Revision Control and Enable Revision Tracking and Audit Trail application settings, provides the ability to track all document changes as separate revisions. This functionality allows a user to roll back to previous versions of a document, view the original document and recover the original document by promoting it back to the current or most recent version of the document.

Note: In addition to these application settings, the user must also have defined Account Functionality Management permissions. Please review the permission section of this manual for additional information.

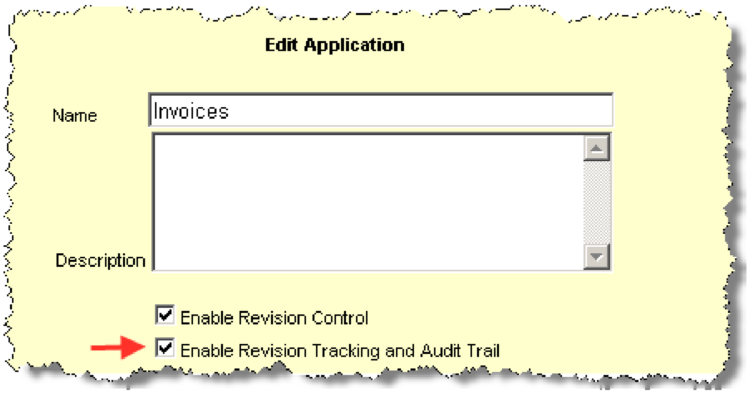
To enable Revision Tracking and Audit Trail, follow the below steps.

1. On the iSynergy Menu bar, select **Admin>Applications**.

   Note: If you have created the application, simply select and modify it. If you have not created the application, select Add Application.

2. Ensure that Enable Revision Control is selected.

3. Select **Enable Revision Tracking and Audit Trail**.



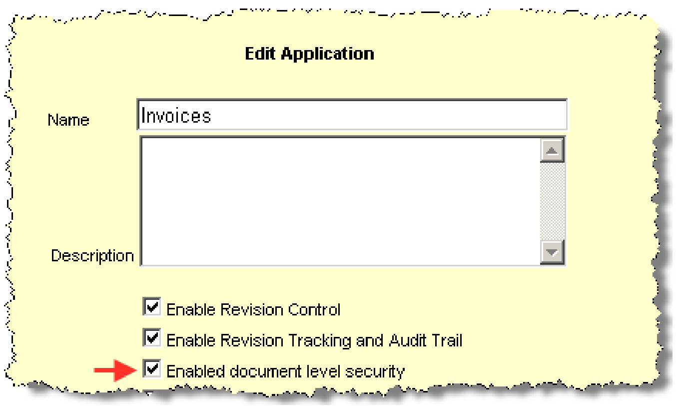
4. Continue creating or modifying the application.

5. When you are finished, select **Update**.

6. Select **Implement**.

Enabled Document Level Security

Document level security enables a System Administrator to grant access to an iSynergy Application while limiting the access rights to particular Documents contained within that Application.



For example, perhaps in the HR application, you want to give a manager the ability to securely view any document in the application, but you want the payroll department to only have access to the Pending New Hires and Submitted to Accounting status values.

When you are adding indexes to applications with document level security, the security setting for the new indexes for each User and Group must be selected.

Note: The Application does not need to be De-implemented to enable Document level security.

To activate Document level security within an Application, follow these steps:

1. On the iSynergy Menu bar, select **Admin**>**Applications**.

2. Navigate to and select the **Application** you want to edit.

3. Select **Enabled Document Level Security** checkbox.

4. Select **Update**.

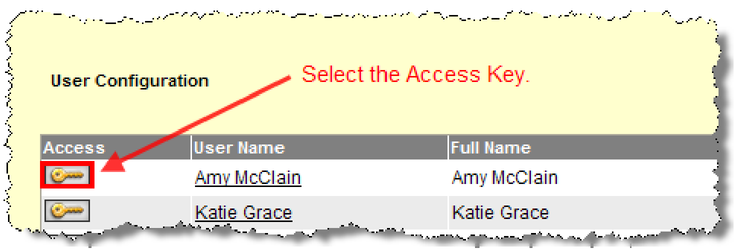
User Account Document Level Security

The following steps configure Document Level Security for a specific user account.

> *Note: The Document Level Security procedure is the same for Groups as well, with the exception of Step 1. You will navigate to Admin>Group Configuration.*

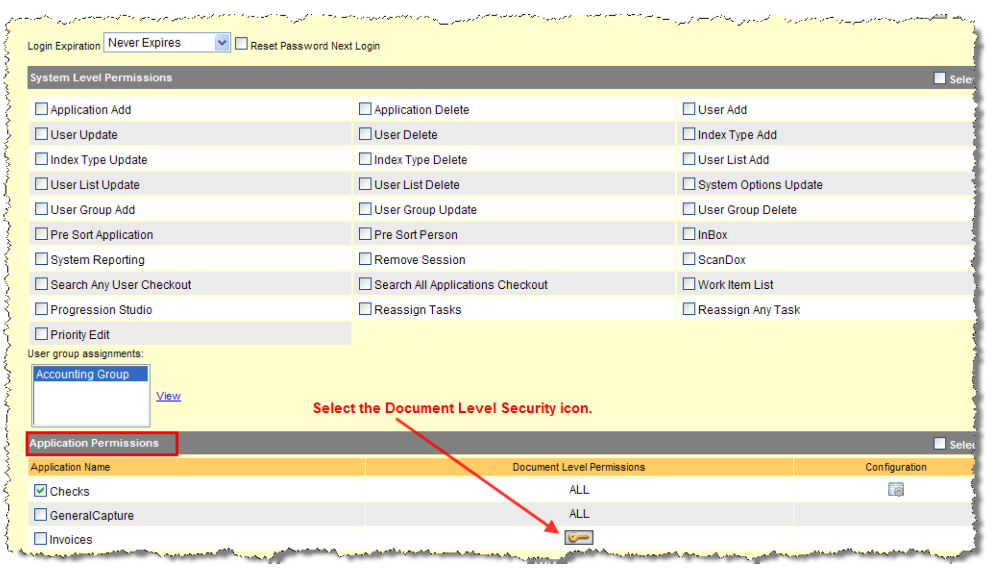
1. On the iSynergy Menu bar, select **Admin>User Configuration**.

2. Select the desired Users **Access K**ey.

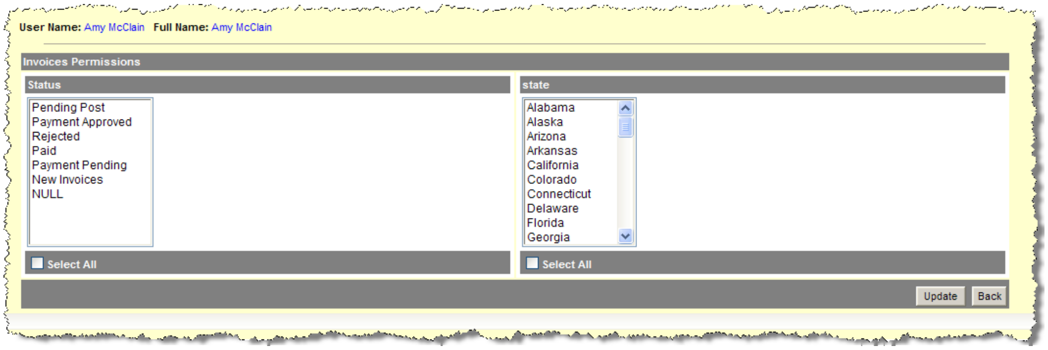


3. Navigate to **Application Permissions**.

4. Select the Application with **Document Level Security**.



5. Select the **UDL values** you wish to make available to the User or the Group.

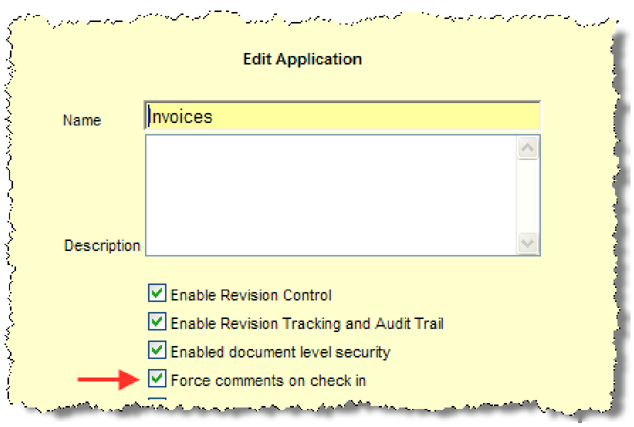


Note: To select multiple Indexes hold the Ctrl key and select the appropriate indexes with your mouse. Additionally, if a specific user should have permission to access and modify the Index, click Select All.

6. Select **Update**.

Force Comments on Check in

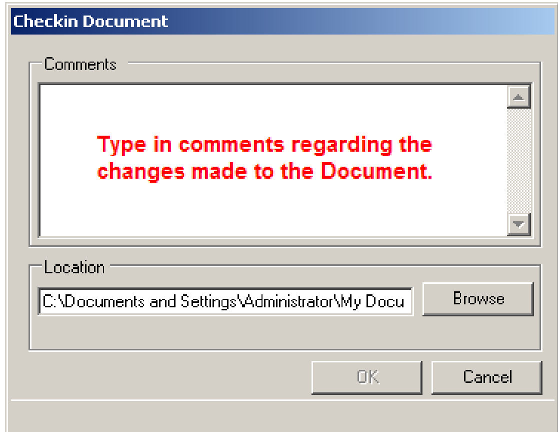
An application can be configured to provide a simple check in/out capability, which will force users to check out a document for editing and prevents more than one user from making changes to a document at the same time.



Using this application setting, the documents that are checked back in to the application will overwrite the original version of the document. Regardless of how the user chooses to check out the document, either by downloading or editing in place, when the user is ready to check the document back into the iSynergy Repository, a Checkin Document dialog displays and provides the ability to enter text.

When the user has finished typing a comment, select OK and the comments are available to any user who has access to that specific application.

Force comments on check in works with Enable Revision Control and Enable Revision Tracking and Audit Trail. When an application uses this functionality, a comments dialog displays upon checking in a document into the iSynergy Repository.

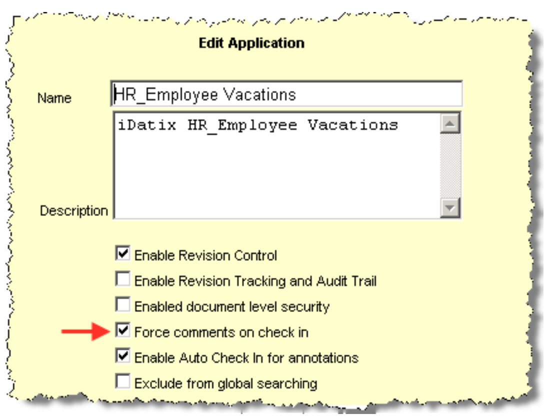


To active Force Comments on Checkin, follow these steps.

1. On the iSynergy Menu bar, select **Admin>Applications**.

2. Navigate to and select the Application you want to **edit**.

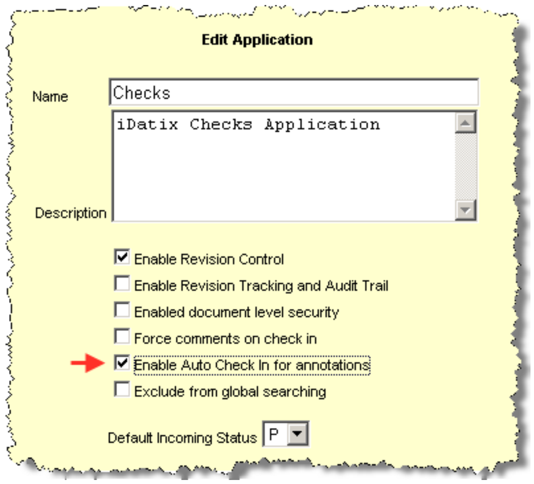
3. Select **Force Comments on check in** checkbox.



4. Select **Update**.

Enable Auto Check in for Annotations

Enable Auto Check in for Annotations is an Application security setting that eliminates the need to check in a document when a user only changes annotations on a document and there are no physical changes to the image.



Note: This is an application setting and will only be available if Revision Control is enabled.

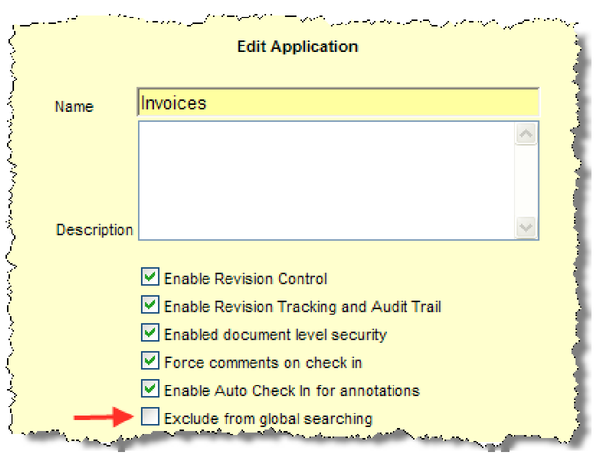
When Enable Auto Check in for annotations is selected, the document is automatically checked in upon the user leaving the image in the Viewer; the user is not prompted to check in the document, nor is the user forced to make comments on a check in.

Note: This feature only applies to the case were a user adds, deletes or modifies annotations and no other changes to the document are made. If a user checks out a document and also performs any other changes to the document, such as a page rotation or page deletion, the auto check in for annotations will not apply.

Exclude from Global Searching

Global Searching provides the ability to search across all applications based on any index value. When an application is created, administrators can tightly control the ability to globally search for an index value.

Global Searching also provides the ability to search for any document, regardless of the status and display it on the Search page. Global searches are performed across all enabled Applications for which the User has access permissions. Index values matching the search criteria are returned regardless of the index type and the index name associated with the index value following a global search.



Add Indexes to an Application

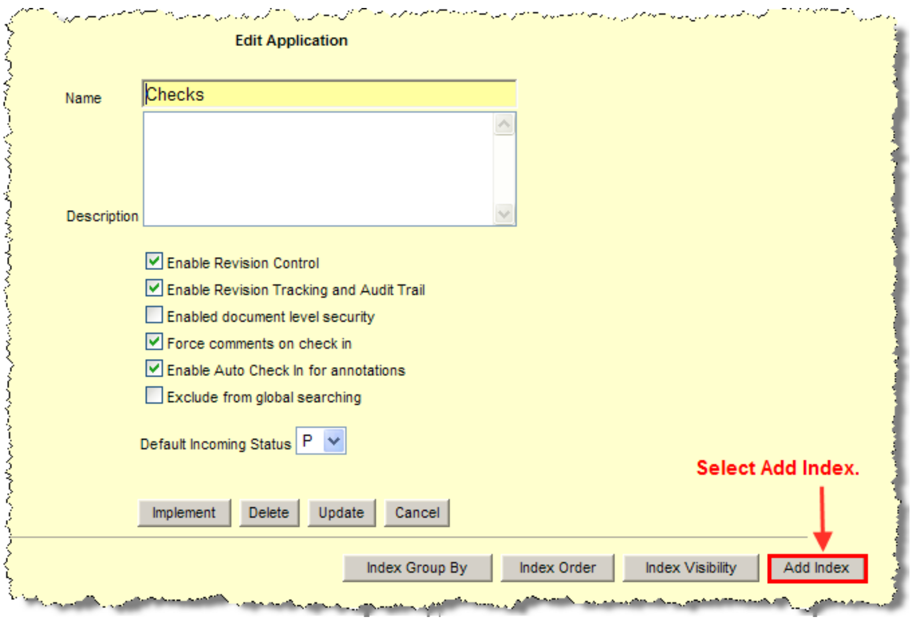
Once an Application has been created, you are ready to add indexes.

For additional reference material regarding Application Setup, please review Appendix 1.

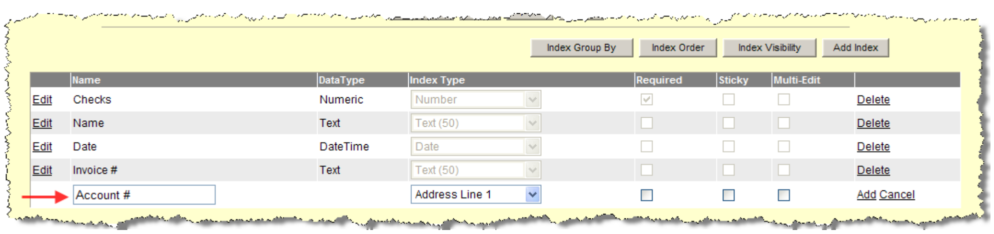
1. On the iSynergy Menu bar, navigate to **Admin>Applications**.

   Note: The Application Configuration dialog window displays.

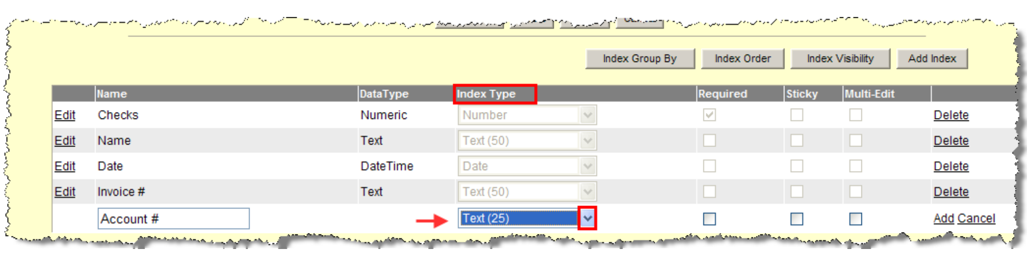
2. Locate the created **Application**.
3. Select **Add Index**.



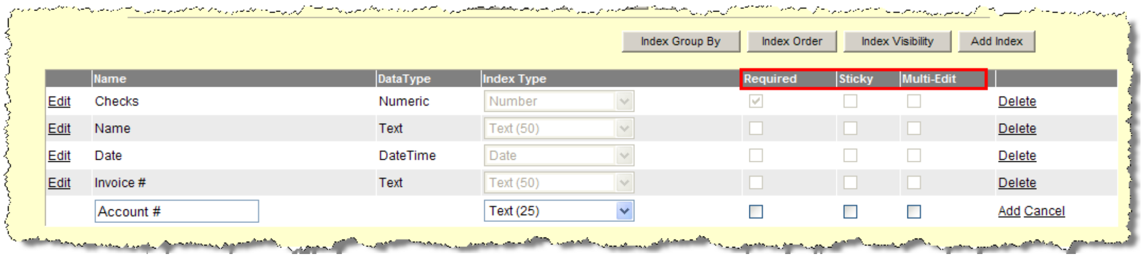
4. Enter the **Index Name**.



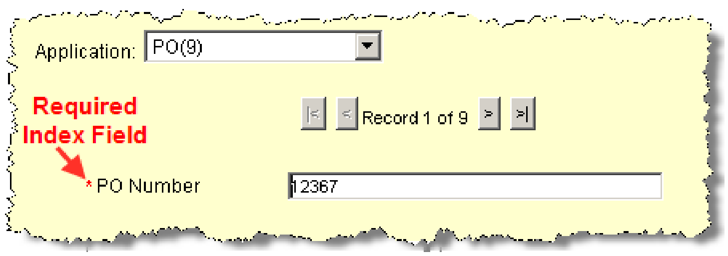
5. Select the **Index Type drop down** and choose the appropriate index type.



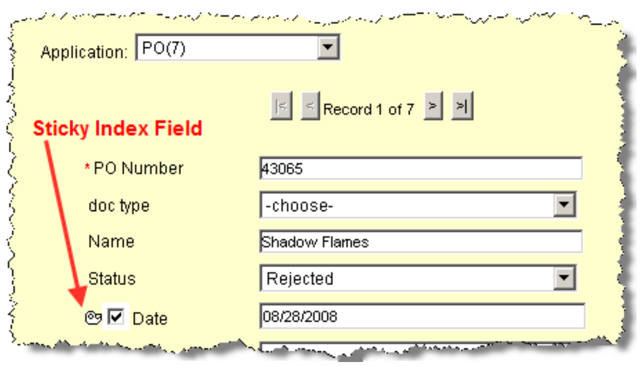
6. If appropriate, select **Required**, **Sticky** and/or **Multi-Edit**.



Element	Description
Required	Provides the ability to require a user to enter a value for an index before the document is submitted to iSynergy.

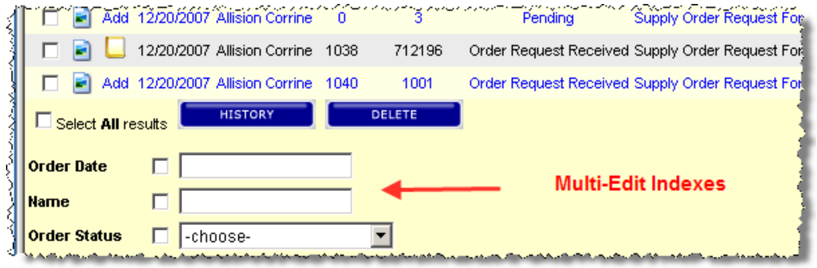


Element	Description
Sticky	Provides the ability to keep a data value displayed in the index field after the document is submitted to iSynergy.

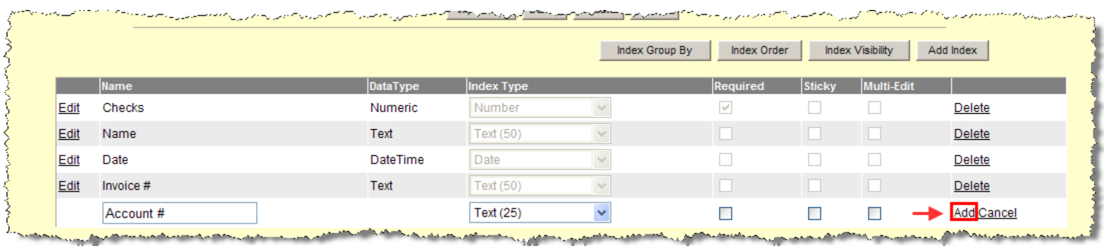


Note: If a UDL is made sticky, the value last placed in the UDL will remain for the next document to be indexed.

Element	Description
Multi-Edit	Provides the ability for an index to be modified for multiple documents simultaneously.



7. Select **Add**.



Note: The newly created Index appears in the Application table pane. Within this table, you can edit or delete Index values associated with the Application.

Editing Application Indexes

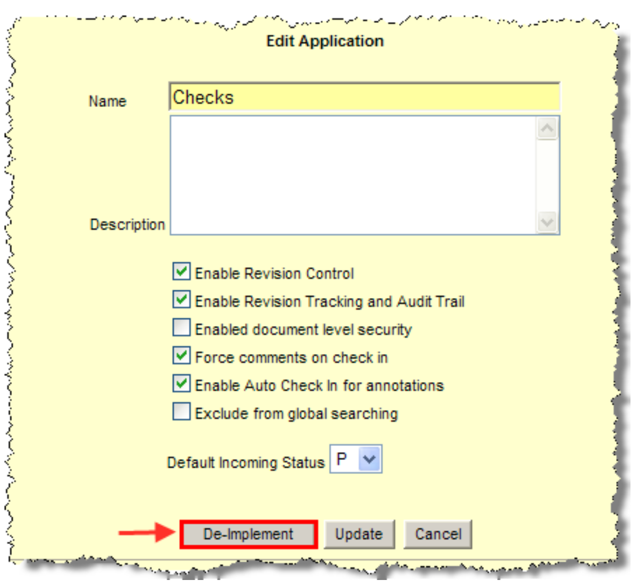
To edit an Application index, follow these steps:

1. On the iSynergy Menu bar, navigate to **Admin>Applications**.

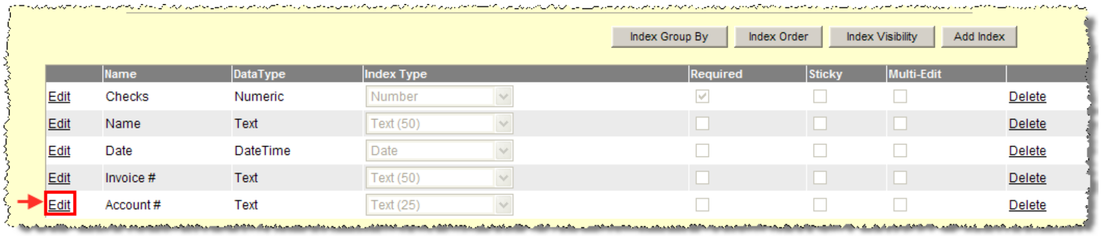
   Note: The Application Configuration dialog window displays.

2. Select the appropriate **Application**.

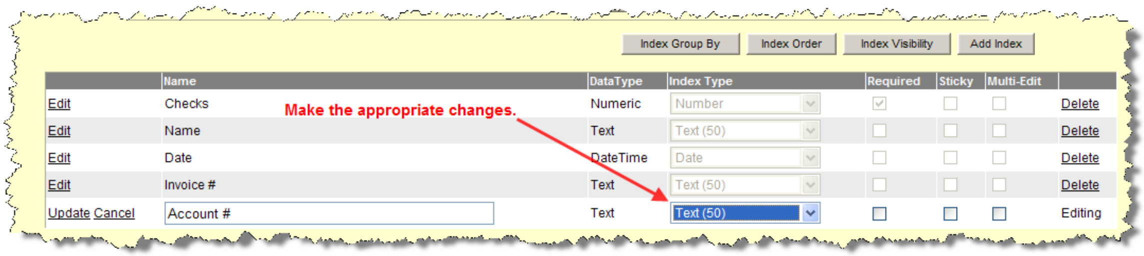
3. Select **De-Implement**.



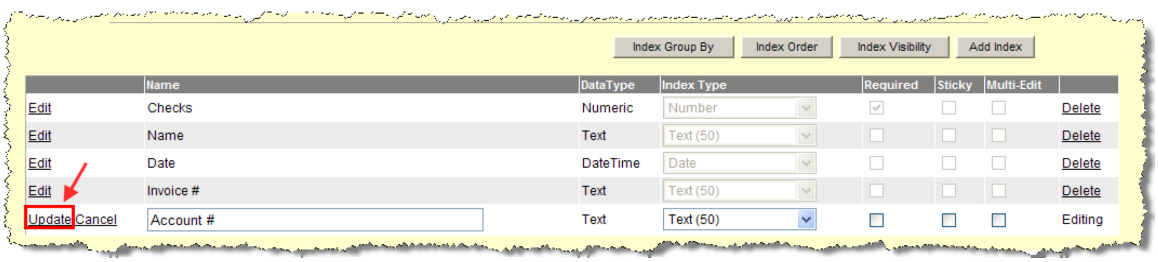
4. Navigate to the Index Field you want to edit and select **Edit**.



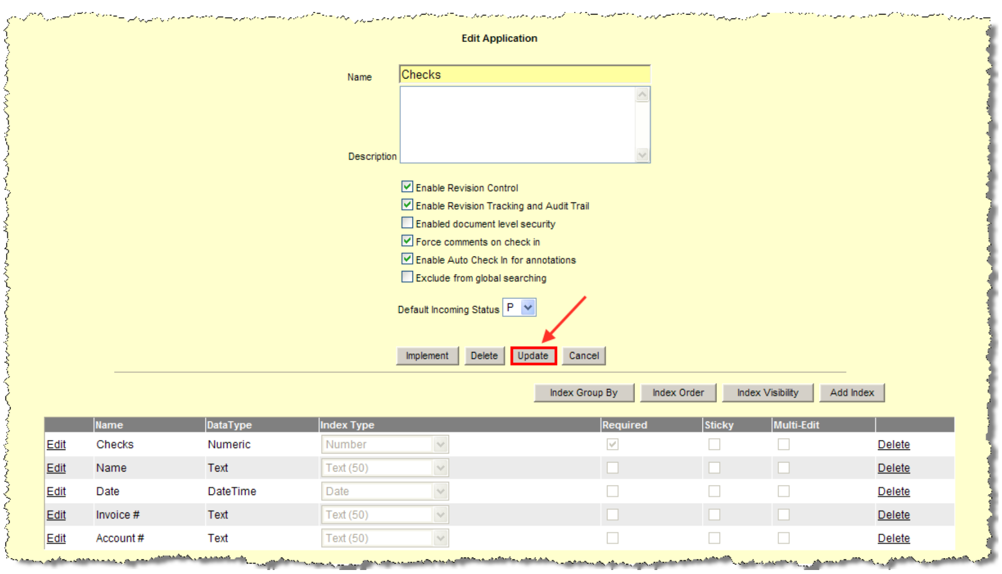
5. Make the appropriate changes.



6. Select **Update**.



7. Select **Update**.



8. Select **Implement**.

Group and User Permissions

Account management techniques allow an Administrator to control the levels of document access and permissions granted to individual Users and Groups (of users) working within iSynergy.

Assigning individual accounts membership(s) to group account(s) is an effective way to ease account administration overhead. Each user assigned to a group account inherits the permissions granted to the group.

> *For example, a user assigned group permissions can have additional permissions assigned individually to his user account.*

When working with a dynamic information database, it is necessary to institute security measures of varying levels among Users within the system to ensure its' integrity. Within iSynergy, it is possible to deny a User or Group access to an Application(s) or to limit functionality while within an Application. Various Users may be granted access to Applications pertinent to their duties while being refused access to Applications outside the scope of their duties. Additionally, it is possible to grant a User or Group access to an Application while limiting access to particular Document types or Document statuses within the Application.

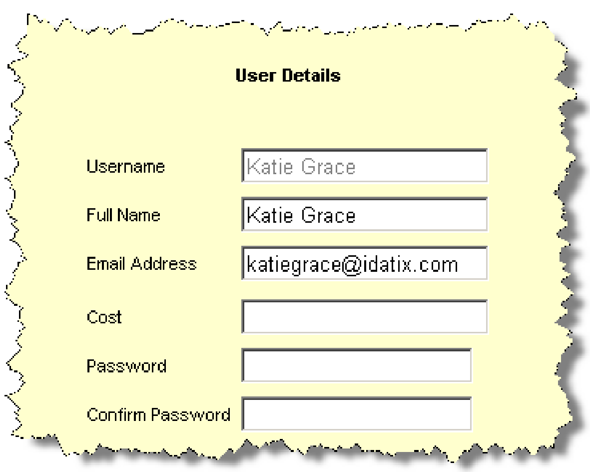
By combining Application level and Document level security approaches, it is possible to create a highly granular mode of access control in iSynergy.

User Account Management

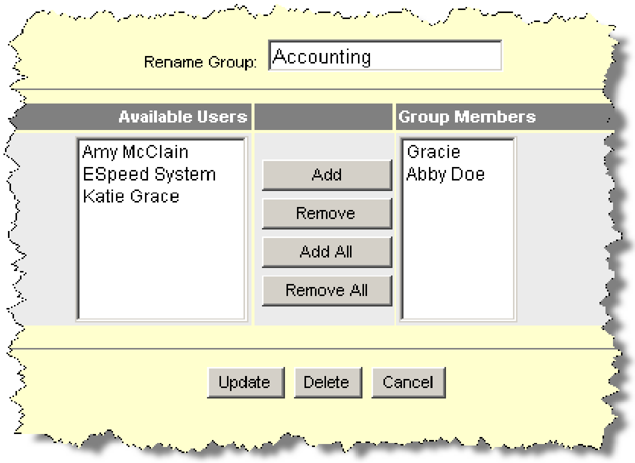
At the most basic level, User accounts grant an individual authentication and entry privileges into iSynergy. Permissions assigned to a User account determine the access and functionality an individual has at his/her fingertips when logged into iSynergy.

The basic configuration attributes of a User account include:

- User name.
- Full Name.
- Email Address.
- Cost.
- Account password.



Group accounts in iSynergy lessen the task load of the system administrator. The administrator can set permissions within Group accounts and subsequently grant membership of User accounts to various Groups.



Note: This is a more effective approach than assigning permissions for each User account on an individual basis.

Group Account examples include:

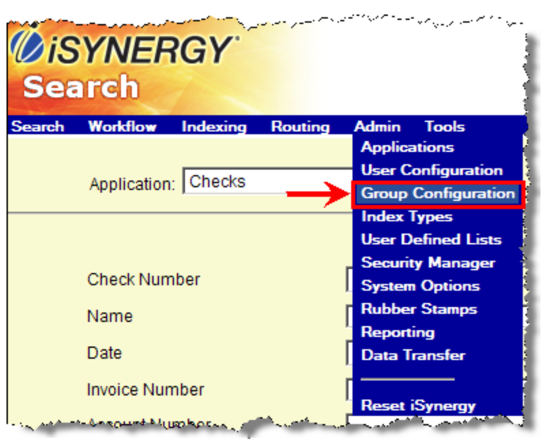
- Groups based on department membership (Sales, HR, Customer Service).
- Groups based on job scope and responsibility (scanner operators, data entry personnel, analysts).
- Basic Users group with limited permissions.
- System Administrators group with full permissions.

Note: The rights and permissions granted to User accounts based on multiple memberships are cumulative.

Creating a New Group

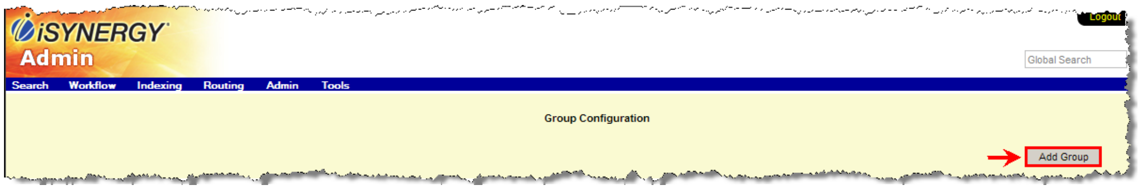
To add a new Group to the iSynergy system, follow the below steps:

1. On the iSynergy Menu bar, navigate to **Admin>Group Configuration**.



Note: The Group Configuration dialog window displays.

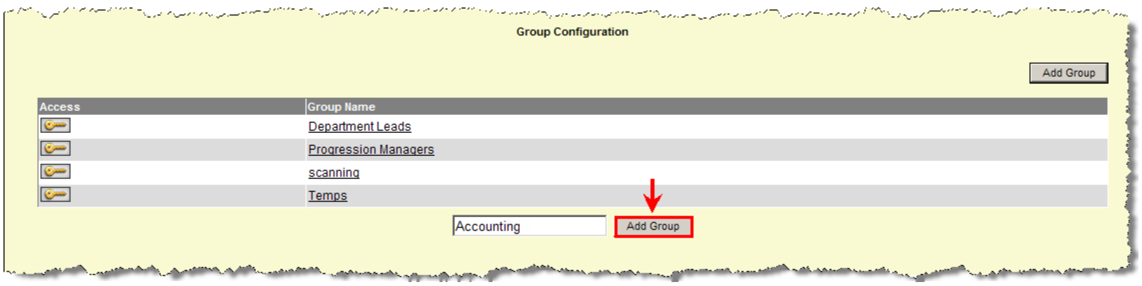
2. Select **Add Group**.



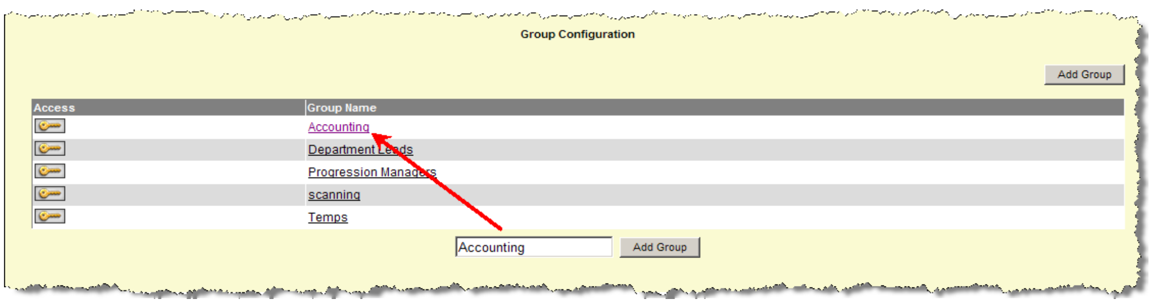
Note: A new text box displays under the existing iSynergy Groups.

3. Enter the **New Group Name**.

4. Select **Add Group**.



5. The newly created Group displays in the Group Configuration table.



Modify Group Permissions

To add or modify permissions of a Group account, follow these steps:

1. On the iSynergy Menu bar, select **Admin>Group Configuration**.

2. Select the Group **Access Key**.

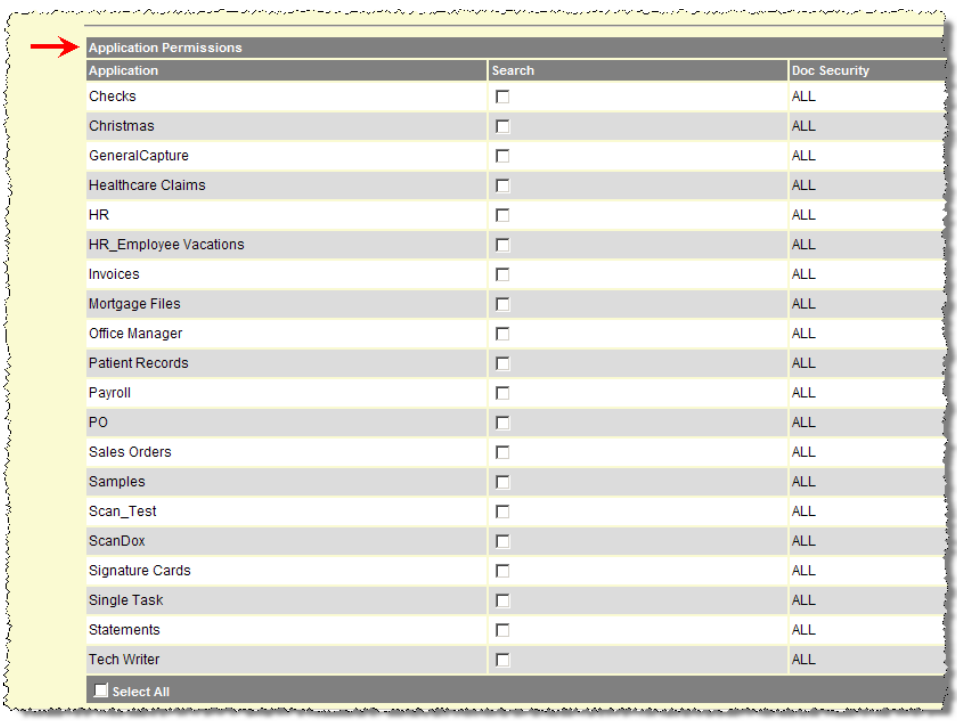
Note: The Application Permission dialog window displays.

3. Select individual checkboxes to grant specific permissions.

    Note: If you want to give all permissions, choose Select All Permissions and click Update.

4. Navigate to **Application Permissions**.

5. Select the appropriate **Application**(s) the User Group need permission to access.

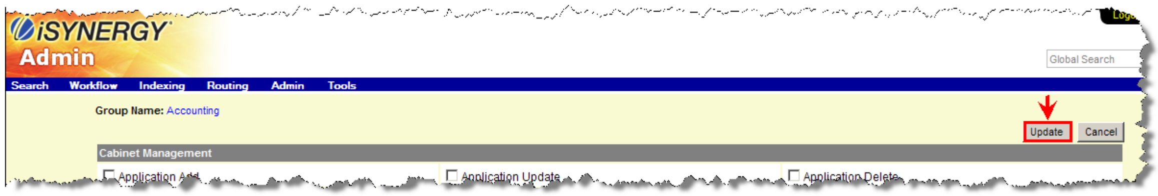


Application Permissions

Application	Search	Doc Security
Checks		ALL
Christmas		ALL
GeneralCapture		ALL
Healthcare Claims		ALL
HR		ALL
HR_Employee Vacations		ALL
Invoices		ALL
Mortgage Files		ALL
Office Manager		ALL
Patient Records		ALL
Payroll		ALL
PO		ALL
Sales Orders		ALL
Samples		ALL
Scan_Test		ALL
ScanDox		ALL
Signature Cards		ALL
Single Task		ALL
Statements		ALL
Tech Writer		ALL

Select All

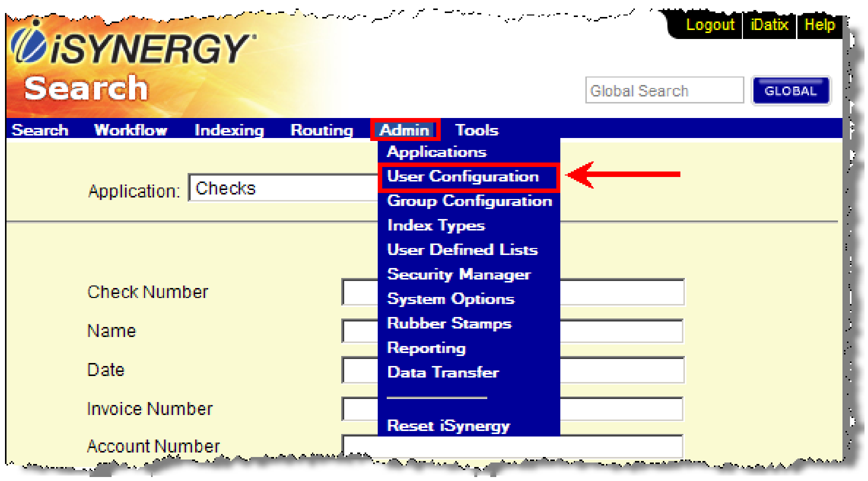
6. Select **Update**.



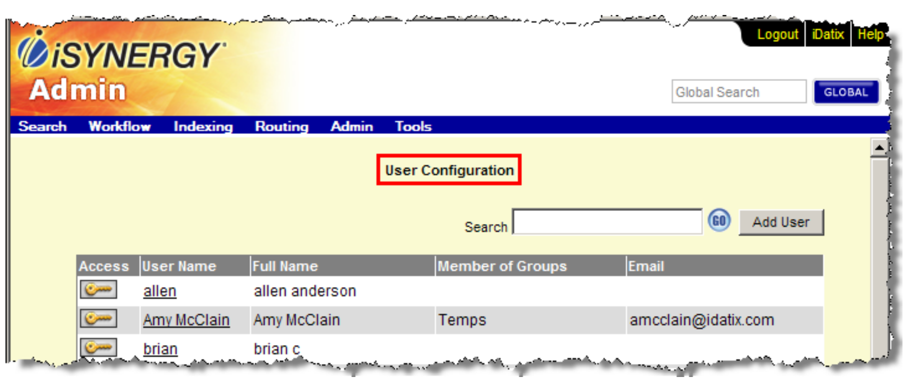
Creating a New User Account

To add a new iSynergy User, follow these steps:

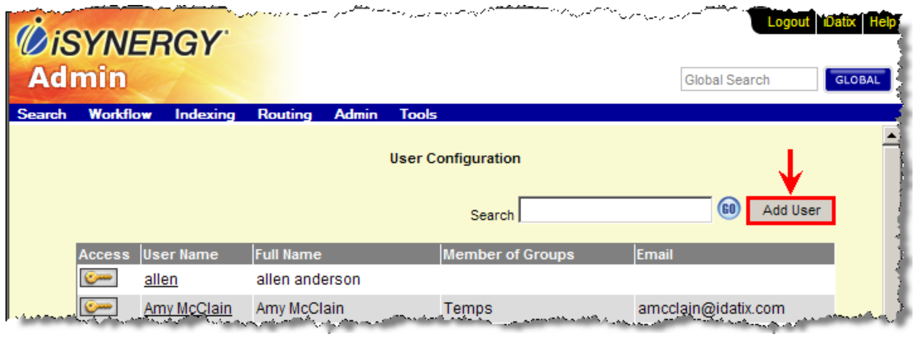
1. On the iSynergy Menu bar, select **Admin**>**User Configuration**.



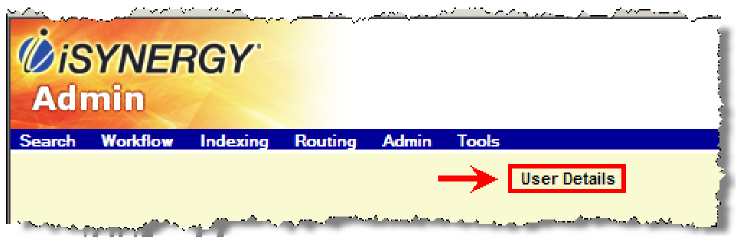
Note: The User Configuration dialog displays.



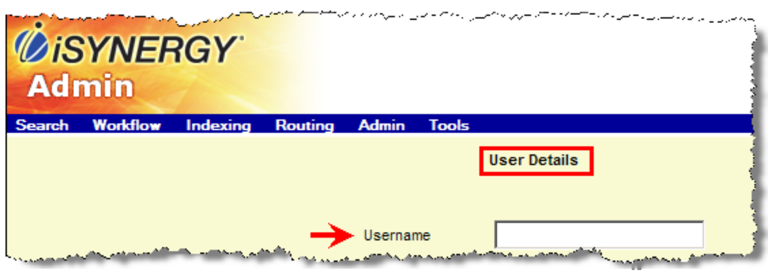
2. Click **Add User.**



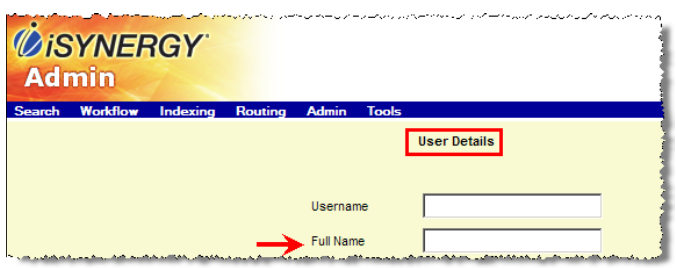
Note: This User Details dialog displays.



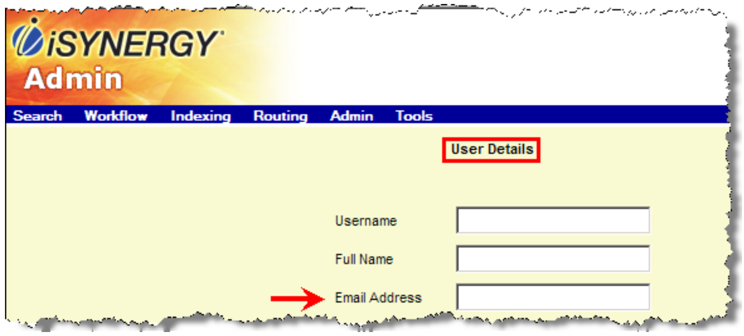
3. Tab to the **Username** Field and define the Username.



4. Tab to the **Full Name** text field and enter the Users full name.



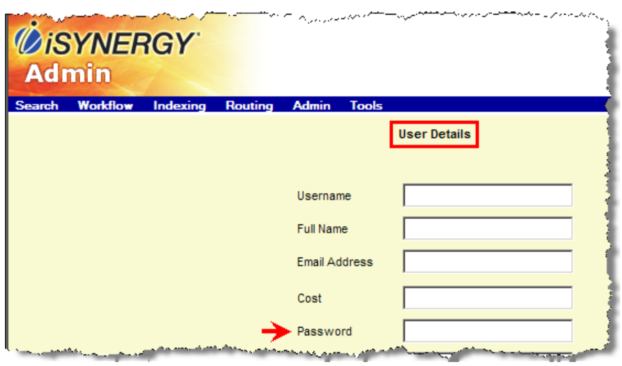
5. Tab to the **Email Address** text field and enter the Email Address.



6. Tab to the cost and **define the hourly cost**.

Note: This cost field is an optional field; however, if you are using the iDatix Business Automation Product, Progression, this cost field will be helpful for production reports and tracking the amount of hours an employee spends on a specific task.

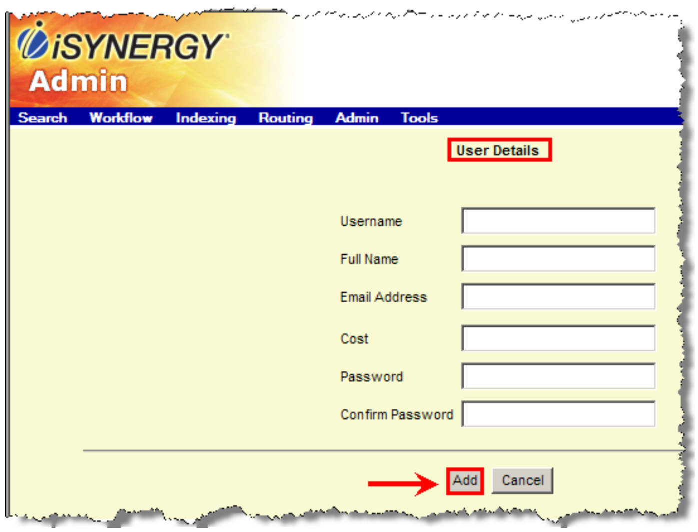
7. Tab to the Password text field and **define the Users' password**.



8. Tab to the Confirm Password text field and **Renter the Password** as defined in Step 7.

Note: Passwords are case sensitive! Passwords must be unique, and cannot be the same as the username.

9. Click the **Add** button to add the new User and his/her details.



Note: Select cancel if you do not wish to add the User details.

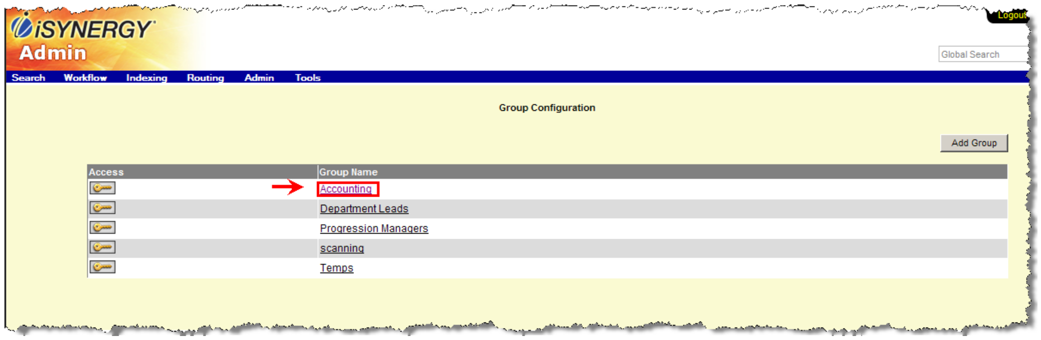
10. The User Configuration dialog displays and the user has now been added to iSynergy.

Adding a User to a Group

To add a User to a Group, follow these steps:

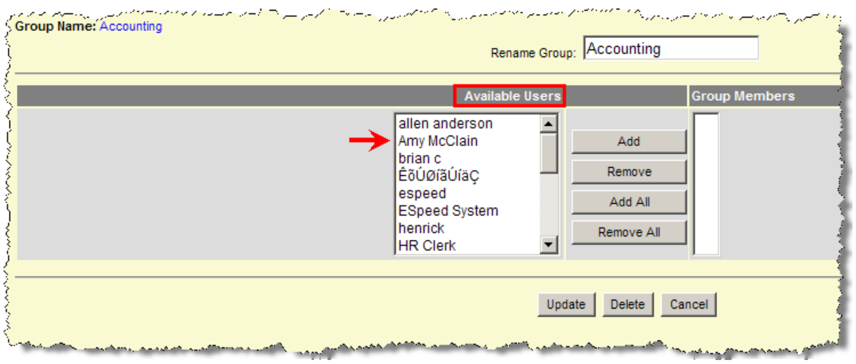
1. On the iSynergy Menu bar, navigate to **Admin**>**Group Configuration**

2. Select the **Group Name**.

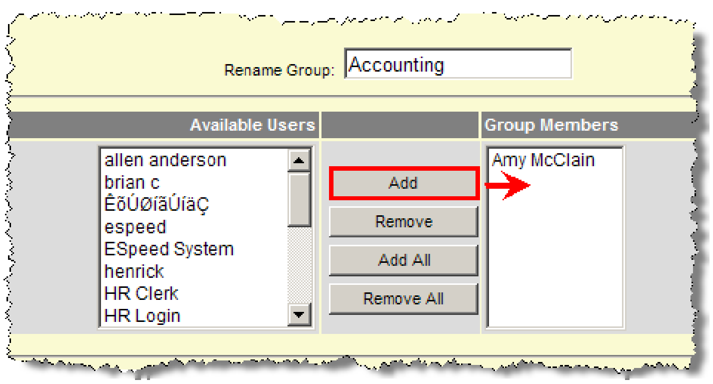


Note: The Group Name dialog window displays.

3. Select an **Available User**.

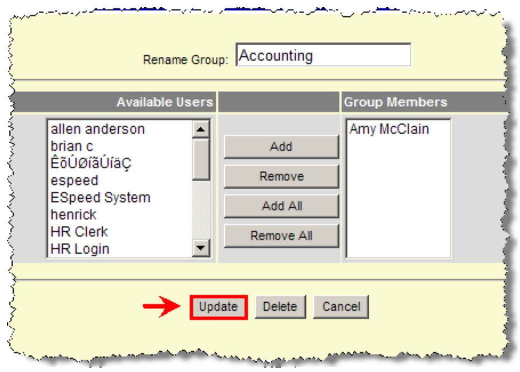


4. Select **Add**.



Note: To make multiple selections, use the Shift or Ctrl keys on your keyboard as appropriate.

3. Click **Update**.

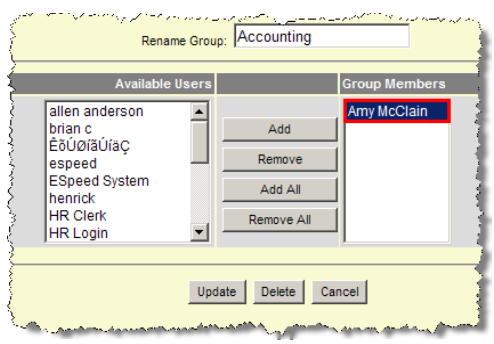


To check the Group membership status of a User, navigate to Admin>User Configuration page; the group membership displays in the Member of Groups column.

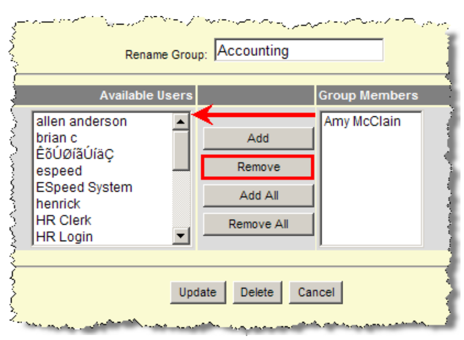
Removing a User from a Group

To remove a User from a Group, follow these steps:

1. On the iSynergy menu bar, navigate to **Admin**>**Group Configuration**.
2. **Select the Group** that contains the User you want to remove.
3. Select the **User** you want to remove in the Group Members' column.

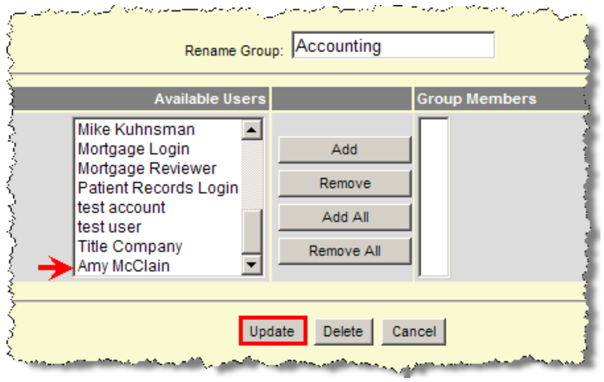


4. Select **Remove.**



Note: The removed user is re-added to the Available Users.

5. Select **Update**.



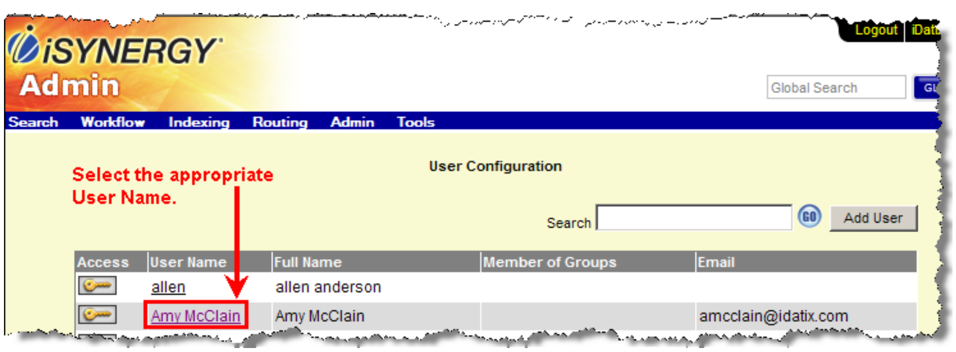
6. The selected user is removed from the Group.

Note: To verify a User's removal from a Group, load the User Configuration page to confirm the User is no longer included within the Group by viewing the 'Member of Groups' column.

Delete a User Account

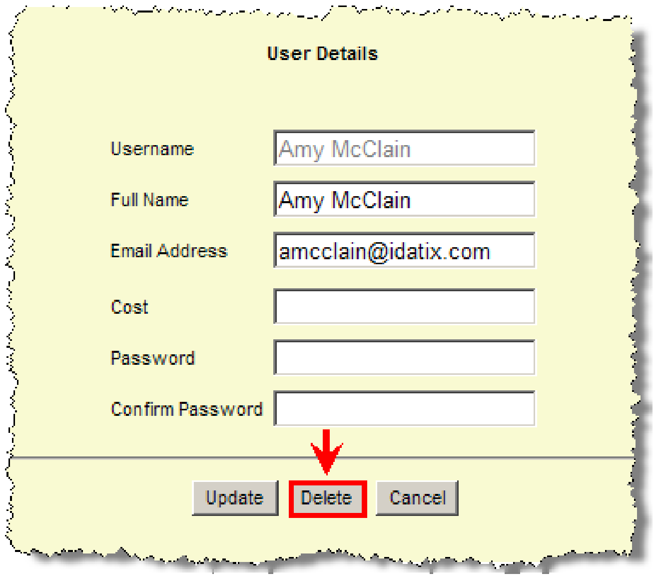
To delete a User account, follow these steps:

1. On the iSynergy Menu bar, navigate to **Admin**>**User Configuration**.
2. Locate the user you want to Delete.
3. Select the desired Username.



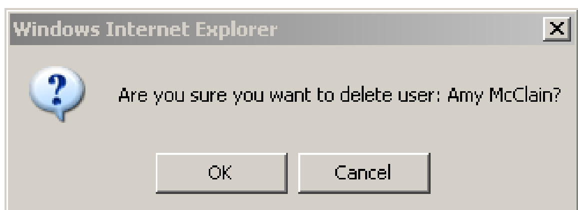
Note: The User Details dialog displays.

3. Select **Delete**.



Note: A Windows Internet Explorer dialog window displays with the selected user name.

4. Select **OK.**

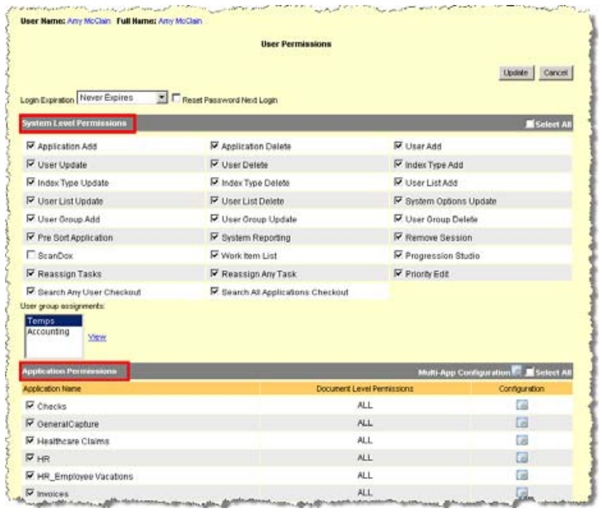


Permission Management

Permissions granted to individual users or groups can be limited in nature or broad in scope depending on the various roles and the granted rights of the User/Group.

For example, it may prove prudent to limit permissions granted to data entry personnel. They may need access to only one Application for data entry purposes. Additionally, Executive Management may be granted permissions pertaining to assignment of Group memberships such as adding Applications and creating new UDLs.

iSynergy permissions are defined initially at the System Level, followed immediately by the Application level.

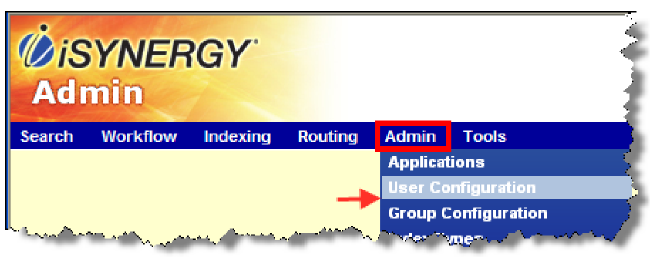


System Level Permissions

iSynergy provides the ability to define system level role assignments to grant access to global tasks and permissions that apply to the iSynergy system as a whole. Each user and/or group who requires access to iSynergy should have a system level role assignment. System Level Permissions can be thought of as the entire filing physical cabinet, these permissions provide access to open specific cabinets and files within iSynergy.

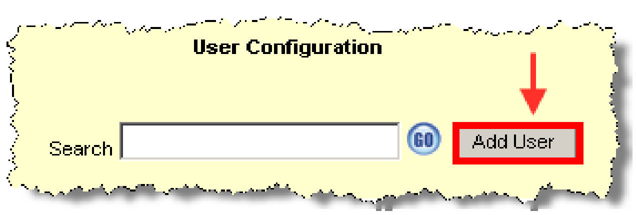
To define a user or groups System Level Permissions, follow the below procedure.

1. From the iSynergy Menu bar, navigate to **Admin>User Configuration**.



Note: The User Configuration dialog displays.

2. Select **Add User**.

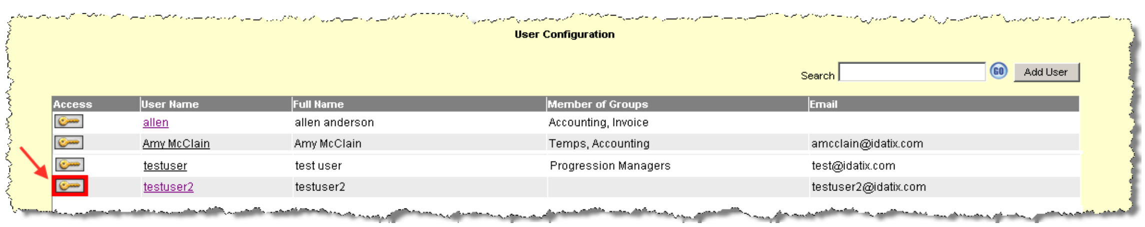


3. Define the new **User Details**.

4. Select **Update**.

   Note: The user returns to the User Configuration screen.

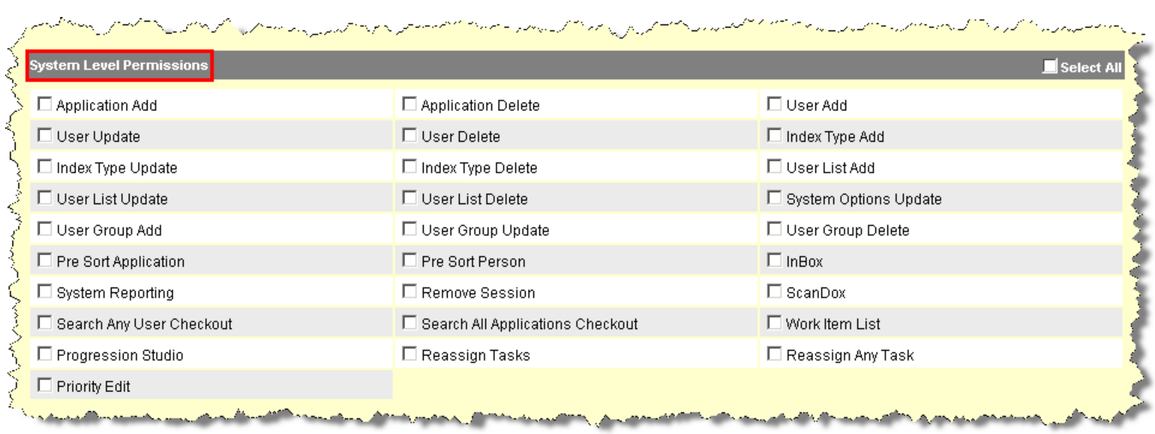
5. Navigate to and select the appropriate users **Access Key**.



   Note: The User Permissions dialog displays for the selected user. When a user is initially created, System Level Permissions are not selected and only the currently created iSynergy Applications are displayed at the Application Level.

6. Navigate to **System Level Permissions**.

   Note: Each System Level Permission has been defined in the below table.



Element	Description
Application Add	Provides the ability to add an iSynergy Application. *Note: This permission enables the Applications Admin Menu item, as well as enable the Add New Application button the Application Configuration dialog.*
Application Delete	Provides the ability to delete an iSynergy Application. *Note: This permission enables the Application Admin menu, as well as enables the Delete button on the Edit Application dialog.*
User Add	Provides the ability to create a new iSynergy user account. *Note: This permission works in conjunction with the User Update permission. You must have both permissions selected in order to create a new user.*
User Update	Provides the ability to update a user account, as well as update all System Level Permissions of another user. *Note: In order to add a user to iSynergy, you must have both the User Add and User Update permission. Additionally, in order to delete a user from iSynergy, at the System Level you must have both the User Update and User Delete permission selected.*
User Delete	Provides the ability to delete an existing user account. *Note: This permission words in conjunction with the User Update permission. You must have both permissions selected in order to delete a user.*
Index Type Add	Provides the ability to add an index type. *Note: This permission works in conjunction with the Index Type Update permission. You must have both permissions selected in order to add and update an index type.*
Index Type Update	Provides the ability to update an index type. *Note: In order to update an index type, you must have both the Index Type Add and Index Type Update. Additionally, in order to delete an index type from iSynergy, at the System Level you must have both the Index Type Update and Index Type Delete permission selected.*

Index Type Delete Provides the ability to delete an index type.

Note: This permission works in conjunction with the Index Type Update permission. You must have both permission selected in order to delete an index type.

User List Add Provides the ability to create a UDL.

Note: This permission works in conjunction with the User List Update permission. You must have both permissions to add an iSynergy UDL.

User List Update Provides the ability to modify a previously created UDL.

Note: In order to update a UDL, you must both the User List Add and the User List Update permission. Additionally, in order to delete a UDL in iSynergy, at the System Level you must have both the User List Update and User List Delete permission.

User List Delete Provides the ability to delete a UDL.

Note: This permission works in conjunction with the User List Update permission. You must have both permissions selected to delete an iSynergy UDL.

System Options Update Provides the ability to update the system configuration options.

Note: To modify the iSynergy System Options, navigate to Admin>System Configuration>System Options.

User Group Add Provides the ability to create a new user group.

Note: This permission works in conjunction with User Group update. You must have both permissions selected to add an iSynergy User Group.

User Group Update Provides the ability to update a user group.

Note; In order to update an iSynergy User Group, you must have both the User Group Add and the User Group update permission. Additionally, to delete a User group, you must have both the User Group and User Group Delete permission selected.

User Group Delete Provides the ability to delete a user group.

Note: This permission works in conjunction with the User Group Update permission. You must have both permissions selected to delete an iSynergy User Group.

Pre Sort Application Provides the ability for a user to access to the General Capture page and therefore whether or not the presort general capture option shows up in the menu.

Pre Sort Person Determines if a user may route to an inbox from General Capture. The drop down allowing a user to select a user's inbox to route to is not present on the general capture page if the user does not have the System Level Permission to Pre Sort Application.

Inbox Provides the ability to access an inbox for a specified user. Documents that are placed in an iSynergy users inbox are available to be routed to either another iSynergy Application or another User or Group.

Note: When a document has been sent to your inbox, you will not be able to see the index fields and therefore you are unable to update them. Any document that is placed in a users inbox must first go through manual indexing before it is submitted to an application. Additionally, selecting the Inbox permission provides the ability to access the Routing option on the iSynergy Menu.

System Reporting Provides the ability to generate iSynergy reports.

Note: This permission provides the ability to access Admin>Reporting. Additionally, reporting permissions are restricted to the Application Level. The document level security and security permissions are not enforced with this permission.

Remove Session Provides the ability to remove other logged in accounts from active iSynergy session.

ScanDox Provides the ability to install the iDatix capture software product ScanDox.

Note: This permission provides the ability to install ScanDox as a clickonce application. Navigate to the iSynergy Tool Bar and select Tools>ScanDox.

Work Item List Provides the ability to view Progression work items assigned by user.

Note: This permission works in conjunction with the Priority Edit Permission.

Search Any User Checkout	Provides the ability for a user to search checked out documents by other users via a drop down on the Search page. Note: When this permission is selected, all users are displayed in the drop down, plus an All option.
Search All Applications Checkout	Provides the ability to search for a checked out document across all applications. Note: On the Search page for the Application drop down, when enabled there will be an All option. Selecting this option will display a search screen to allow the user to find a document check out across all applications.
Work Item List	Provides the ability to view the Progression work items.
Progression Studio	Provides the ability to access the Progression click once deployment option from the Tools Menu.
Reassign Tasks	Provides the ability to reassign a Progression task that has been assigned to the logged in users account.
Reassign Any Task	Provides the ability to reassign any Progression task which is assigned to any user or group.
Priority Edit	Provides the ability to change priorities on workflow documents.

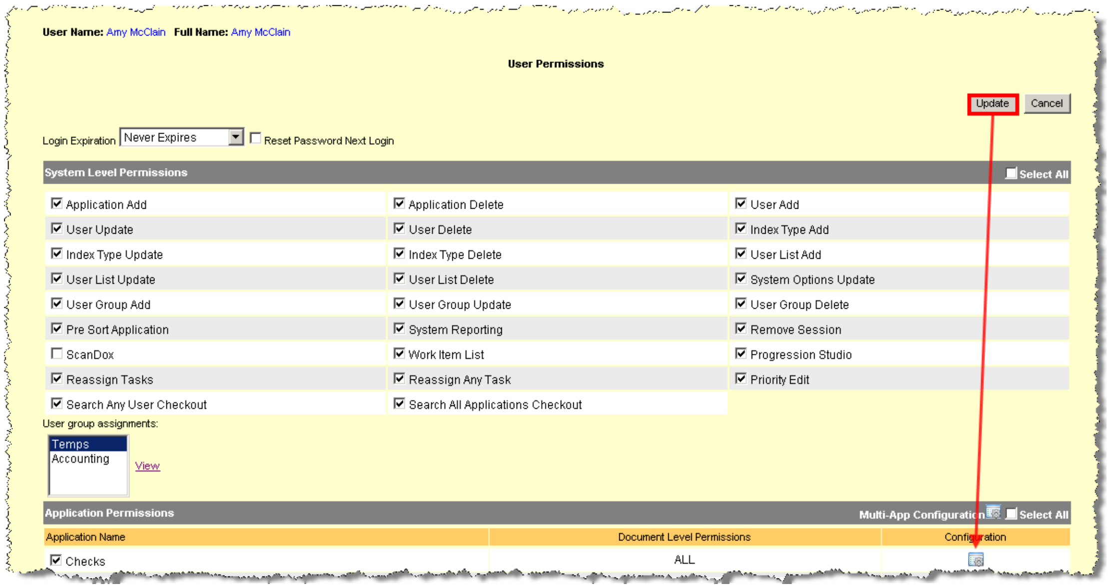
7. Define the appropriate user System Level Permissions.

8. Select **Update**.

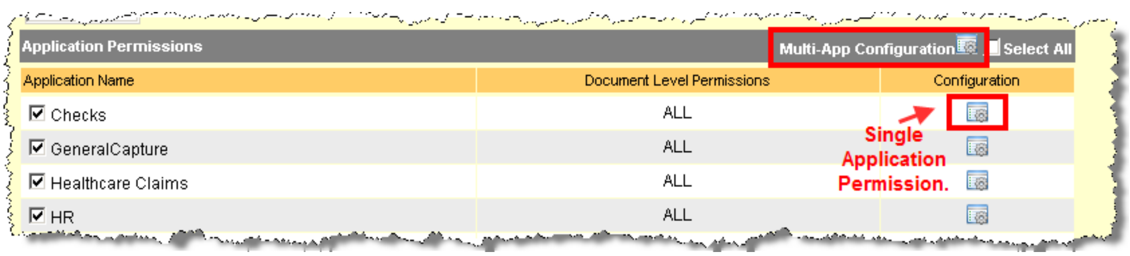
Application Permissions

Once System Level Permissions are defined, you may define the Application Permissions. Application level permissions provide the ability to control the user permissions on a per application basis, as well as enhance security access to the application.

After you have defined the user or group system level and application permission, selecting update enables the application configuration dialog.



iSynergy 3.9 provides the ability to define single application permissions or multi application level permissions.



Application level security is achieved by granting or restricting Application permissions. Application level permissions can be assigned to both User and Group accounts. If the account has permission to search an Application, the Application is available from the Application Selector drop-down menu in the Search Page. If the Application has been restricted, the User/Group will not be aware that the Application even exists, as it will not be visible in the Application Selector drop-down menu.

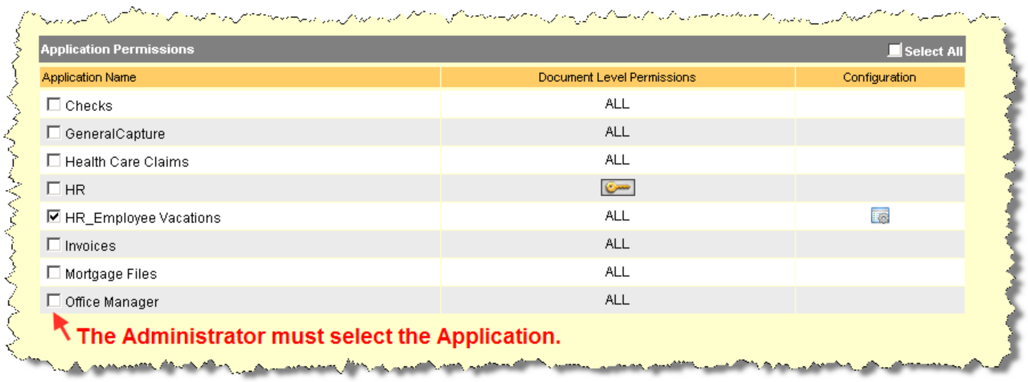
Element	Description
Application Names	Provides a complete listing of all applications which have been added to iSynergy.
Doc Level Permission	Provides the ability to define document level security. *Note: Document Level Security is defined with the unique Application. Navigate to Admin>Applications. Select the appropriate application and choose enabled document level security.*

Configuration Provides the ability to define the application level permissions by Cabinet, System and Account Functionality. Additionally, you may elect to configure multiple applications by selecting Multi-App Configuration.

Cabinet Management Permissions

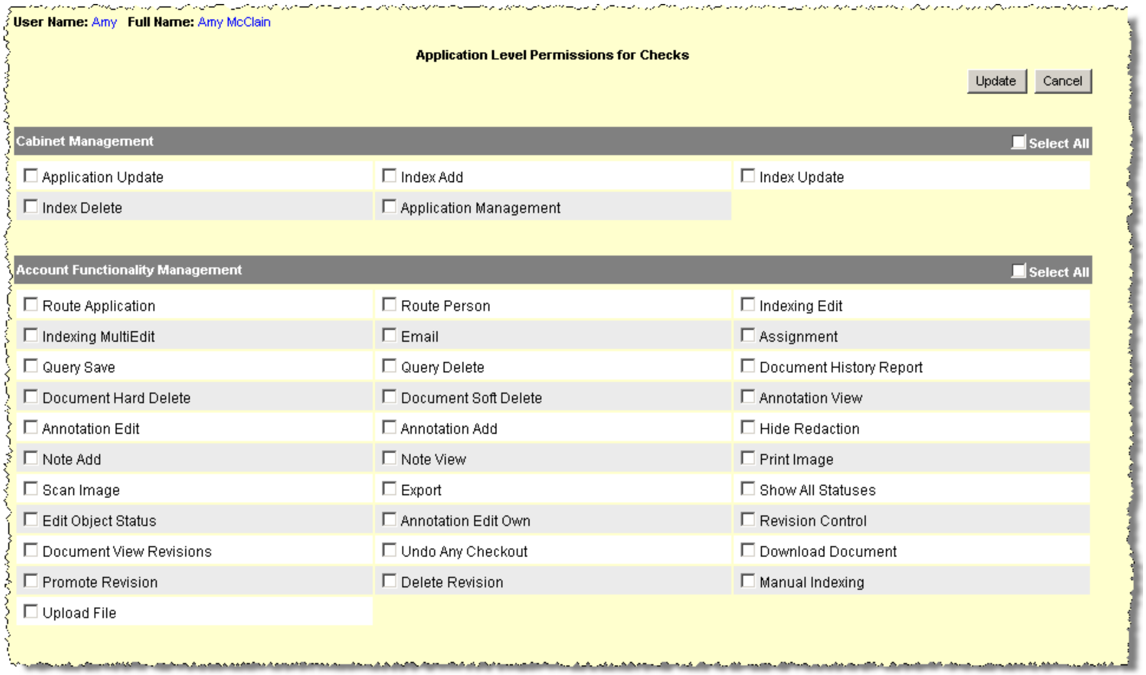
iSynergy provides complete application security that can be defined at the cabinet, system and account functionality level. Cabinet Management permissions are the permissions for the overall application. In other words, you can think of the cabinet as the drawer you would pull out in a filing cabinet. Cabinet management is the organization of how you are going to file documents in that specific drawer.

When a new Application is implemented in iSynergy the default access is restricted. The system administrator must explicitly enable access to the new Application by updating account permissions.



Selecting the appropriate Application configuration icon displays the application level permission for the chosen application. These application level permissions are determined at the following levels:

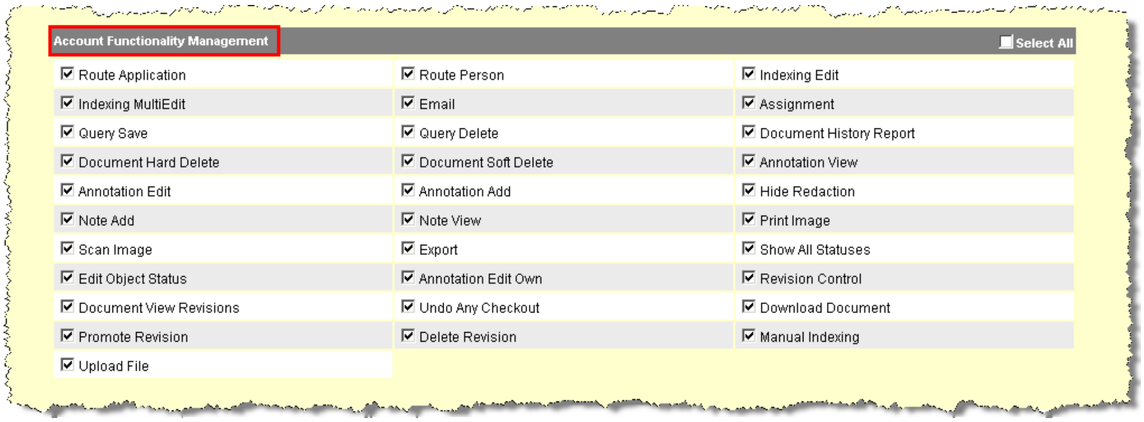
- Cabinet Management.
- Account Functionality Management.



Element	Description
Application Update	Provides the ability to update any Application.
Index Add	Provides the ability to add new Index(s) to an Application.
Index Update	Provides the ability to update a specific Index type.
Index Delete	Provides the ability to mark for deletion (no purge) any index.
Application Management	Provides the ability to manage an application. *Note: This permission provides the ability to utilize the Account Functionality Management permissions.*

Account Functionality Management Permissions

Account Functionality Management Permissions provide the ability to work within the Application. These permissions are specific for user interaction with the documents stored in each unique iSynergy Application.



Element	Description
Route Application	Determines if a user may route documents out of an application.
Route Person	Determines if a user may route to a users inbox from this application.
Indexing Edit	Provides the ability to update index values.
Indexing Multi-edit	Provides the ability to edit multiple indexes simultaneously.
Email	Provides the ability to send email with object attachments.
Assignment	This is not an active permission.
Query Save	Provides the ability for the user to save a query.
Query Delete	Provides the ability for the user to delete a saved query.
Document History Report	Provides the ability for system events history to be displayed with the Reporting functionality.
Document Hard Delete	Provides the ability for an object to be purged from system, or true deletion from storage subsystem. Hard delete permission enables the view of iSynergy's Object Status Field to the group.
Document Soft Delete	Provides the ability for an object to seem to be deleted from iSynergy, but it is flagged for purge from system.
Annotation View	Provides the ability to view any existing Annotations.
Annotation Edit	Provides the ability to create, edit, or delete Annotations. *Note: By default, this permission also provides the ability to view*

the annotation you have created.

Annotation Add	Provides the ability to add, edit, and delete new annotations. *Note: By default, this permission also provides the ability to view the annotation you have created.*
Hide Redaction	Provides the ability to hide Redactions when a user selects the Hide Annotations Icon in the Viewer. The user can then see under redaction annotations.
Note Add	Provides the ability to View and Add new notes. *Note: This permission is dependent on Note View.*
Note View	Provides the ability to View pre-existing notes. *Note: This Permission is necessary to allow Adding of Notes.*
Print Image	Provides the ability to print an image.
Scan Image	This permission is not being used.
Export	Provides the ability to export a Document out of the iSynergy.
Show All Statuses	Provides the ability to display searchable and unsearchable items that normally would not display based on search criteria.
Edit Object Status	Provides the ability to allow a user to change an object status.
Annotation Edit Own	Provides the ability to create, edit or delete annotations.
Revision Control	Provides the ability to enable revision control within a designated application.
Document View Revisions	Provides the ability to review document revisions within a designated application. *Note: This permission is dependent upon Revision Control being selected.*
Undo Any Checkout	Provides the ability to undo any checked out document.
Download Document	Provides the ability to select the download option and save it to a

directory of your choice.

Promote Revision Provides the ability to make a revision the current version of a document.

Delete Revision Provides the ability to delete revisions from an application.

Manual Indexing Provides the ability to manually index a document.

Note: This permission provides the ability to view the Indexing Menu option on the iSynergy Tool bar, as well as display with applications are available in the drop down menu.

Upload File Provides the ability to upload a file while in iSynergy.

Note: This permission is located in the Indexing Menu.

Select All Permissions Checkbox enables all permissions for all items under Cabinet Management, System Management, Account Management, and Account Functionality Management.

User Permissions

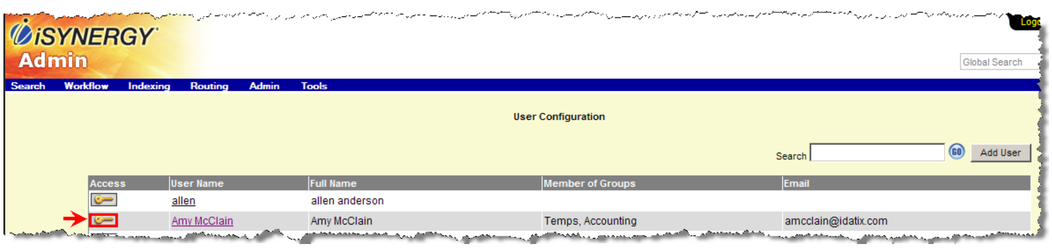
To add or modify User account permissions, follow these steps:

1. On the iSynergy Menu bar, navigate to **Admin**>**User Configuration**.

    Note: This User Configuration displays.

2. Navigate to the **Appropriate User**.

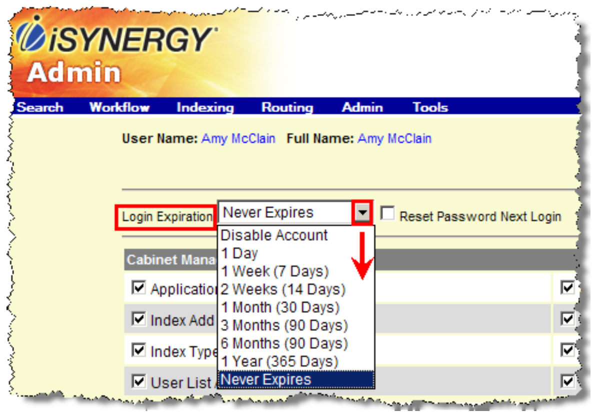
3. Click the desired User **Access Key**.



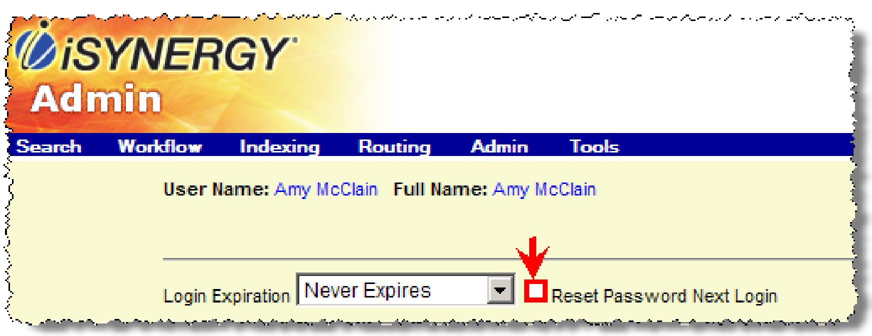
    Note: The selected User Permissions dialog displays.

4. Navigate to **Login Expiration.**

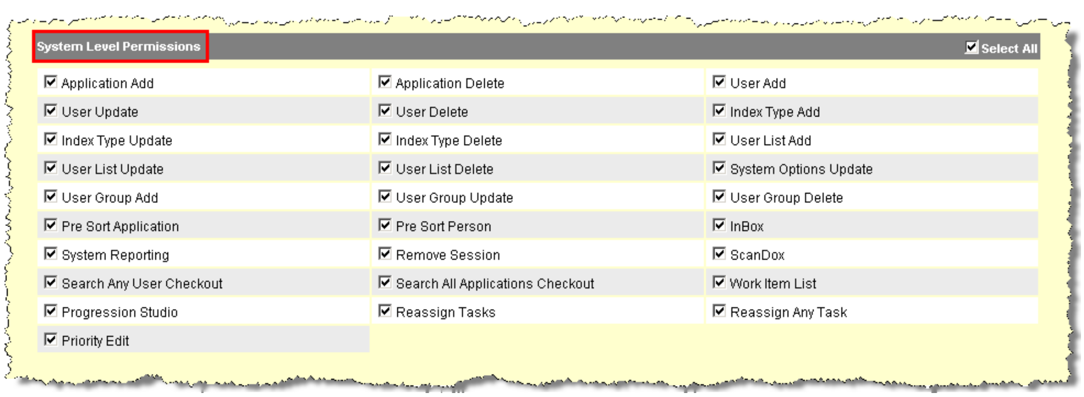
5. Select the **Drop Down** Menu and choose the appropriate option.



Note: If you wish to force the user to define a new password, select Reset Password Next Login.

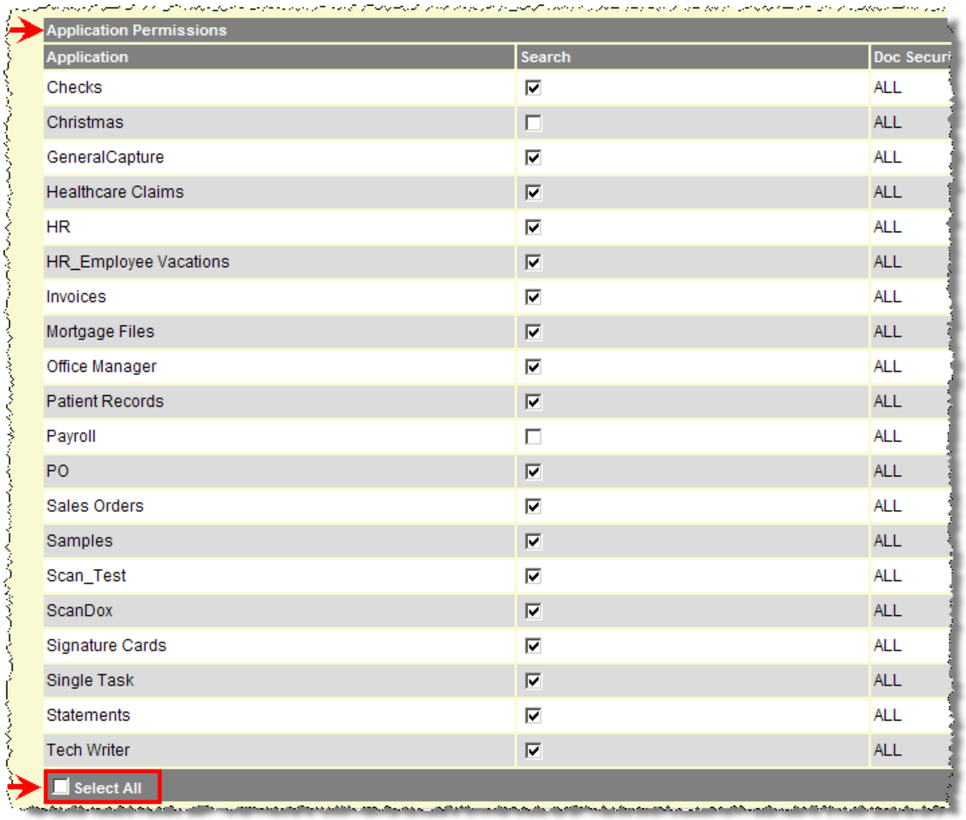


6. Select the Appropriate System Level Permissions.



Note: If all permissions in the aforementioned groups are to be given to the user, click Select All.

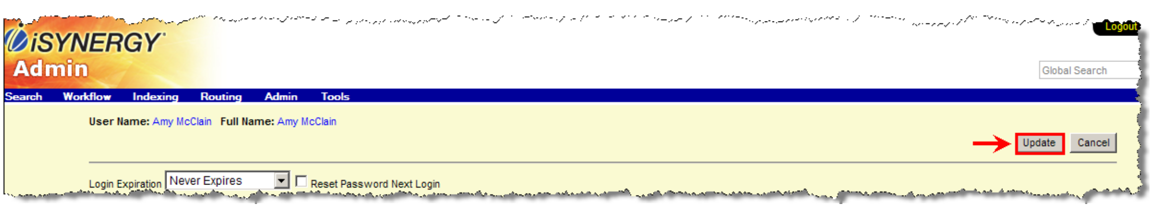
7. Navigate to **Application Permissions** and choose the appropriate **Application**.



Application	Search	Doc Securi
Checks	☑	ALL
Christmas	☐	ALL
GeneralCapture	☑	ALL
Healthcare Claims	☑	ALL
HR	☑	ALL
HR_Employee Vacations	☑	ALL
Invoices	☑	ALL
Mortgage Files	☑	ALL
Office Manager	☑	ALL
Patient Records	☑	ALL
Payroll	☐	ALL
PO	☑	ALL
Sales Orders	☑	ALL
Samples	☑	ALL
Scan_Test	☑	ALL
ScanDox	☑	ALL
Signature Cards	☑	ALL
Single Task	☑	ALL
Statements	☑	ALL
Tech Writer	☑	ALL

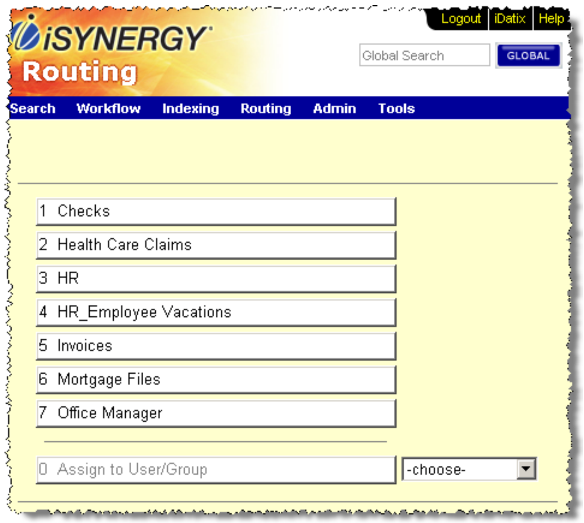
Note: If all Applications are required for the user, click Select All.

8. Click **Update**.



Routing Documents

The process of routing a Document allows a User to move it from its current location to a separate destination. Routing is a very useful tool that is analogous to moving a Document from one work area to another in a traditional office setting.



There are multiple reasons it might be necessary to route a Document. There are also many possible variations for the origin and destination of a Document's path. These various scenarios are discussed in this chapter.

The General Capture Application

General Capture, as its name implies, is a filing Application that serves as the general point of capture for non-indexed Documents entering the iSynergy system. Because they have no Indexes, Documents held in General Capture are not associated with a specific Application. In a traditional office General Capture is analogous to a stack of Documents (commonly at the front desk) that have yet to receive their first "look over" to be directed to their proper departments within the building.

The General Capture Application can accept Documents from various sources, including:

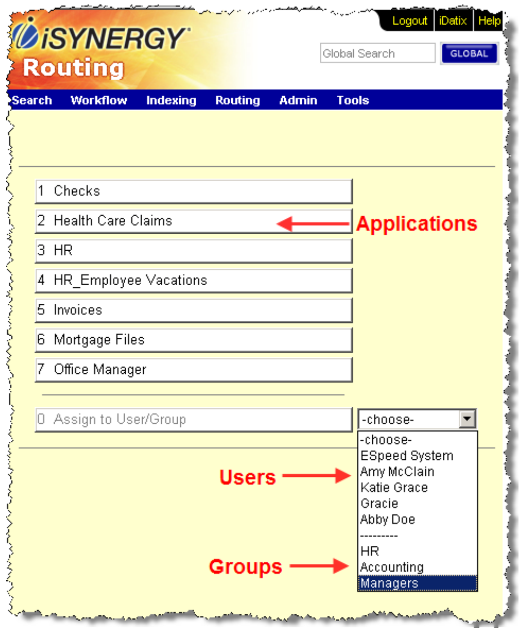
- **ScanSpeed.** An application that works in conjunction with a scanning device to convert paper Documentation to an electronic image format called TIFF (Tagged Image File Format). iSynergy receives these images and then archives them.
- **iScan.** An application, more rudimentary than ScanSpeed, that works in conjunction with a scanning device to convert paper Documentation to an electronic image format called TIFF (Tagged Image File Format). iSynergy receives these images and then archives them.
- **QuickIndexer.** An application that takes new and old electronic files archives and puts them into iSynergy.
- **ScanDox**: ScanDox replaces (or incorporates all elements of) ScanSpeed**,** iScan and QuickIndexer**.**
- **iSynergy Services.** A service that moves electronic files from a designated destination directory to a directory that iSynergy can access.

> *Note: For further information, see the eSpeed Services section found at the end in this Document.*

Three possible destinations exist for Documents exiting the General Capture Application:

- A different iSynergy Application.
- The InBox of an iSynergy User.

- The InBox of an iSynergy Group.



Pre-Sort General Capture

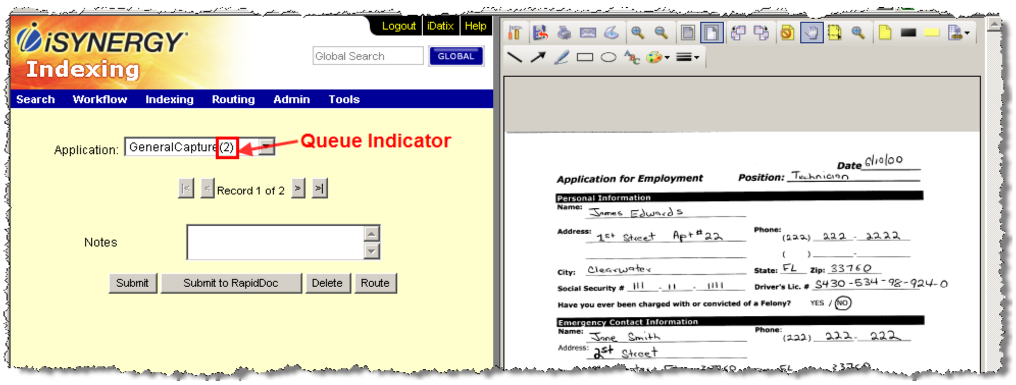
Pre-Sort General Capture allows Documents stored in General Capture to be sorted and routed to various destinations for indexing. Documents chosen from the Queue Indicator are shown in the Document Pane (the Document Pane is not shown in the screen shot below).

The following elements of Pre-Sort General Capture are described below:

- Queue Indicator.
- Application Option.
- Inbox Selector.
- Inbox Activation.
- Cancel Option.

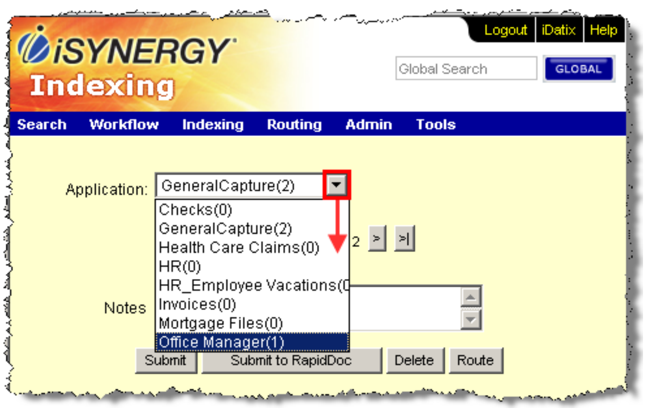
Queue Indicator

Queue Indicator shows how many Documents are waiting for to be routed from the General Capture Application. It also displays which Document is currently loaded in the Document Pane. The Queue Indicator contains a VCR control.



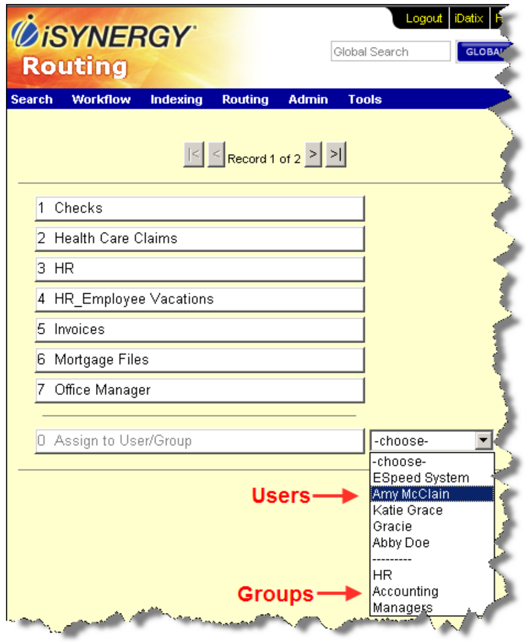
Application Selector

Route an active Document in the Document Pane to a destination Application by selecting the Application from the Application Selector. Clicking a particular Application button sends the active Document to that Application. The next Document in the queue then loads in the Document Pane and is ready to be routed.



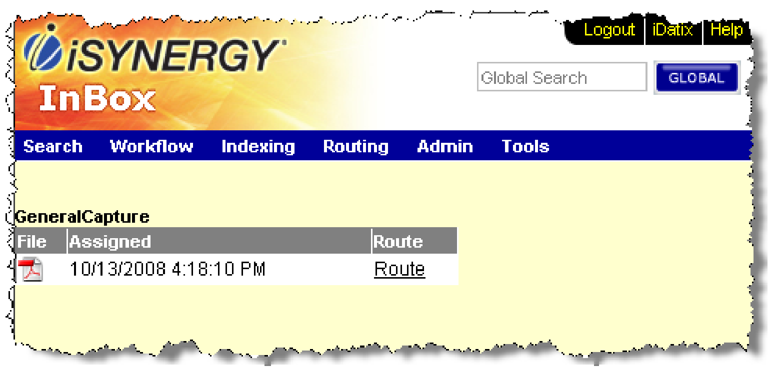
Assign to User/Group

Route a Document to User or a Group InBox by selecting the appropriate option from the Assign to User/Group drop-down field. Routing a Document to a specific User allows only that User to receive the Document in his/her Inbox. Routing a Document to a Group allows any member of that Group to view and process the Document.

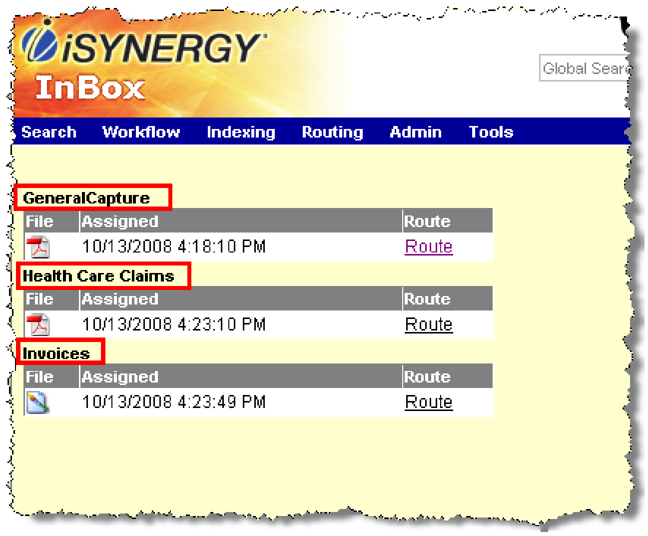


The InBox Page

Each account in iSynergy has the capability of receiving routed Documents to its Inbox. This capability applies to both user accounts and group accounts.



The Table Title displays from which Application the sent Document(s) originated.



If the account InBox contains Documents that originated from more than one Application, each Application contains Documents displayed in a separate Document Table.

Document Tables contain Documents for routing. Each table consists of three Columns:

Element	Description
File Column	Provides the ability to active a Document in the Viewer.
Assigned Column	Provides a simple discovery of the date and time the Document was routed to the InBox.
Route Column	Provides the ability route a document to a destination application and/or a User/Group InBox.

Routing Documents

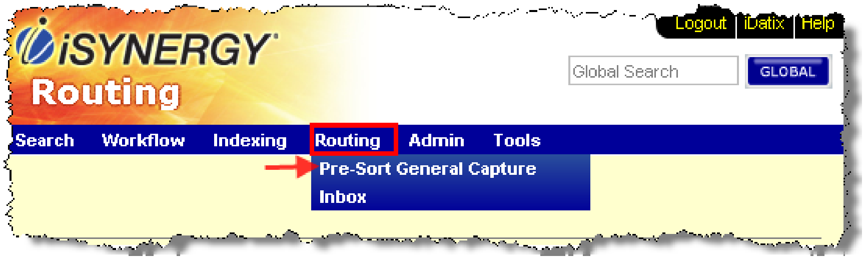
This section covers the process of routing Documents in iSynergy. The following routing scenarios are possible:

- Pre-Sort General Capture to an Application.
- Pre-Sort General Capture to an Inbox.
- Route Inbox to an Application.
- Route Inbox to a different InBox.
- Route Application to a different Application.
- Route Application to an Inbox.

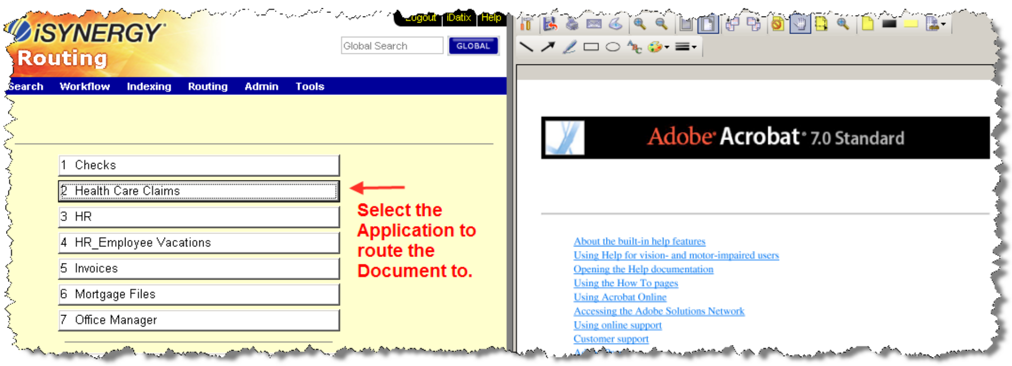
Pre-Sort General Capture to an Application

The following shows how to route a Document from the Pre-Sort General Capture Application to a different Application:

1. From the iSynergy Menu bar, select **Routing** and click **Pre-Sort General Capture.**



2. Select the Application you want to route the document to.



Note: A Microsoft Internet Explorer dialog displays.

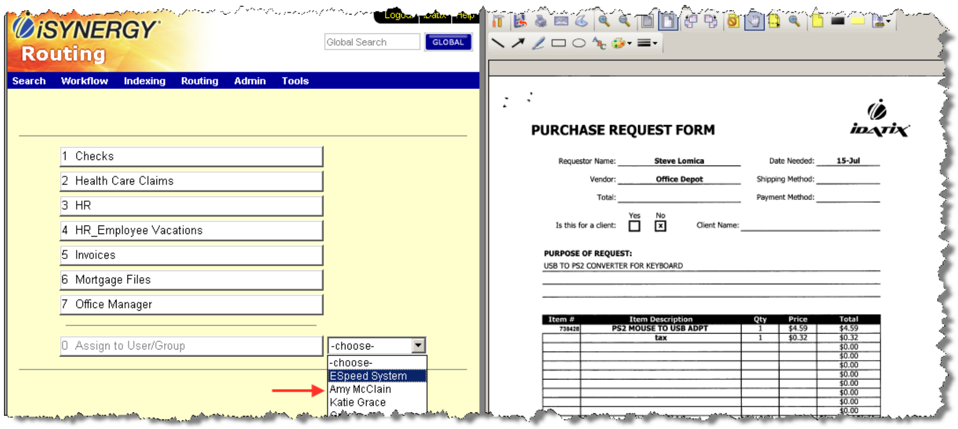
3. Select **OK**.

Pre-Sort General Capture to an Inbox

To route a Document from the Pre-Sort General Capture Application to an InBox, follow these steps:

1. From the iSynergy Menu bar, select **Routing** and click **Pre-Sort General Capture**.

2. Select the **User/Group Name** on the account name and the Document to route it to the account InBox.

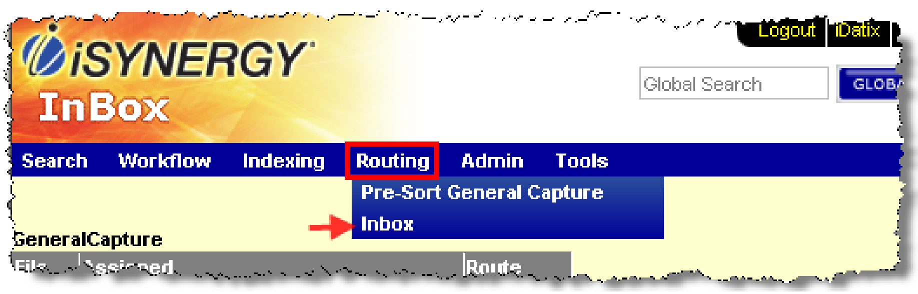


3. Select **OK**.

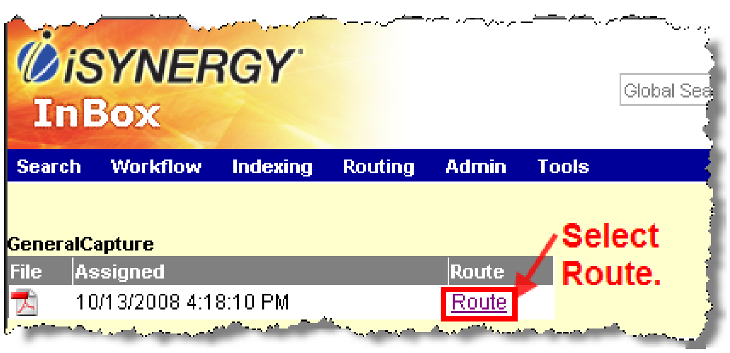
Route from an Inbox to an Application

To route a Document from an Inbox to an Application, follow these steps:

1. From the iSynergy Menu, select **Routing** and click **Inbox**.



2. Select **Route**.



Note: The iSynergy Inbox routing page displays.

3. Select the appropriate **Application** button.

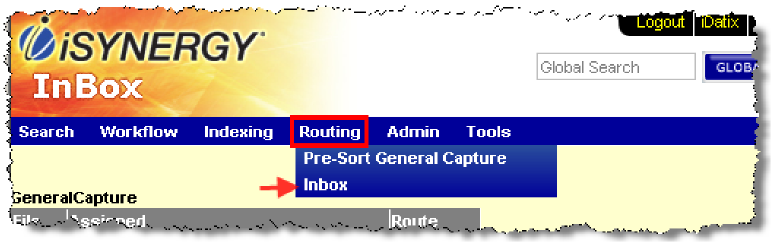
4. Select **OK**.

Route from Inbox to Inbox

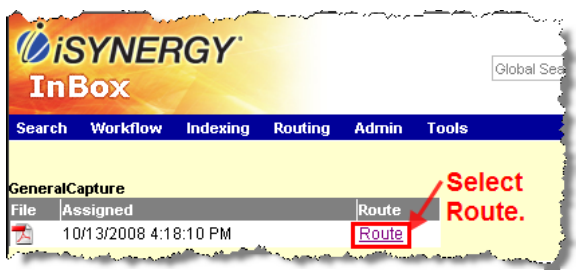
Routing from one Inbox to another Inbox is very similar to routing from an Inbox to an Application. When the Index routing page is loaded, choose an account name rather using the Application option.

To route a Document from an Inbox to a different Inbox, follow these steps:

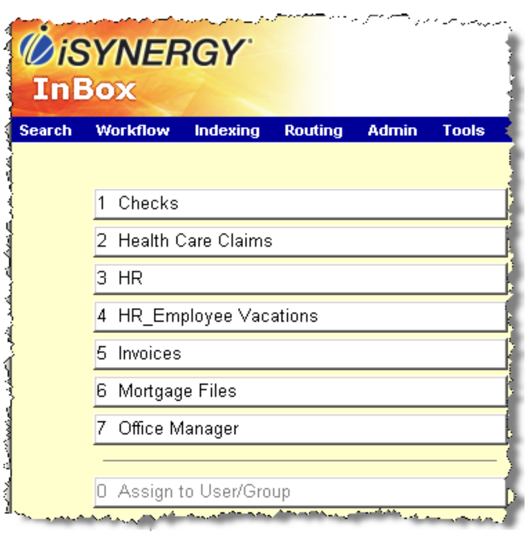
1. From the iSynergy menu, select **Routing** and **Inbox**.



2. Select Route hyperlink.



3. Select the appropriate **Application** button.



4. Select **OK**.

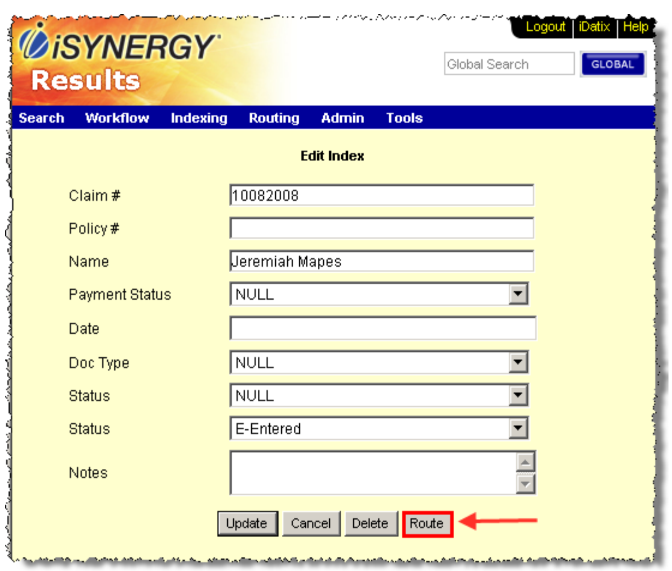
Route from Application to Application

If the document was misclassified or to route a Document from an Application to another Application, follow these steps:

1. Locate the indexed Document you wish to route, right click the file icon.

2. Select Edit Indexes.

3. Select the Route button to access the main Routing page.



4. Click the appropriate Application selector button for the Document to be routed, or you may choose to route to an inbox.

It is also possible to route from Application to Application while indexing Documents on the Indexing page. To route while indexing Documents, click the route button on the bottom right of the Indexing page.

Indexing Documents

Indexing is the act of adding Index values to a Document. Indexing can be a manual or automated process. Documents that have received indexing are searchable within iSynergy.

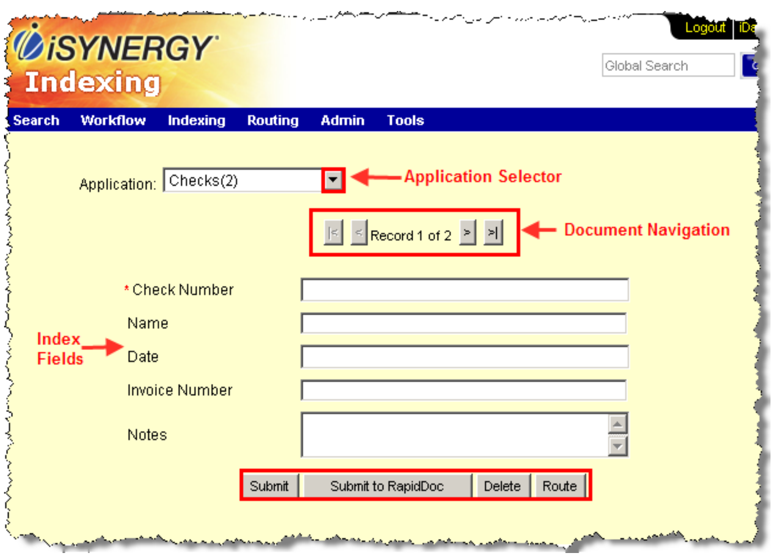
Access and functionality of the Indexing page is based on user permissions.

Note: For more information regarding permissions, please review the Permission Management Section of this manual.

The Indexing Page

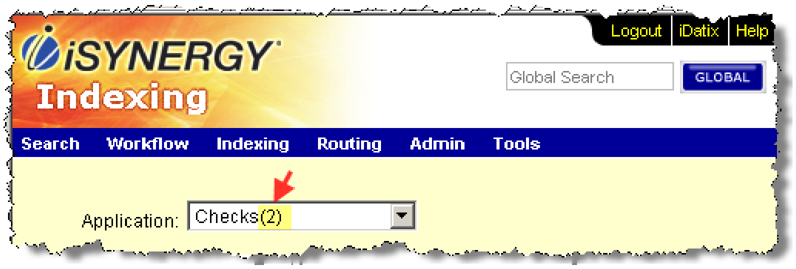
The functional regions of the Indexing page include:

- Application Selector.
- Document Navigation.
- Index Fields.
- Submit.
- Submit to RapidDoc.
- Delete.
- Route.



Application Selector

The Application Selector drop-down list allows you to select the appropriate Application containing Documents for Indexing. The number in parentheses next to Application name indicates how many Documents exist in the Indexing queue for that Application.

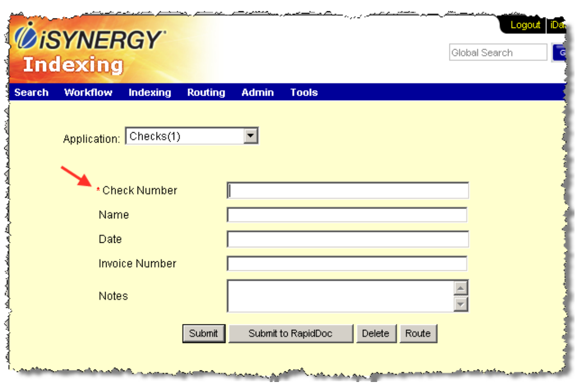


Document Navigation

The Document Navigation allows you to scroll through and view the Documents in the Indexing queue, as well as locate Documents that require immediate indexing.

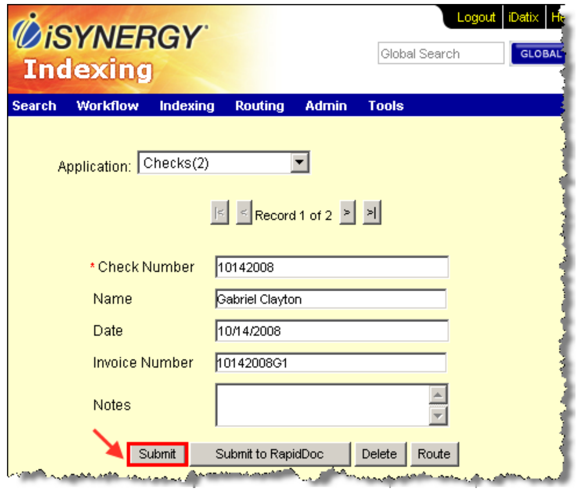
Index Fields

Index fields are regions that accept entry of Index values that correspond to the active Document. Index fields may be text, drop-down or range fields. Notice symbols exist next to some Index fields. These symbols indicate attributes an Index field can possess. A red asterisk next to an Index value indicates that value is required for submission to iSynergy.



Submit

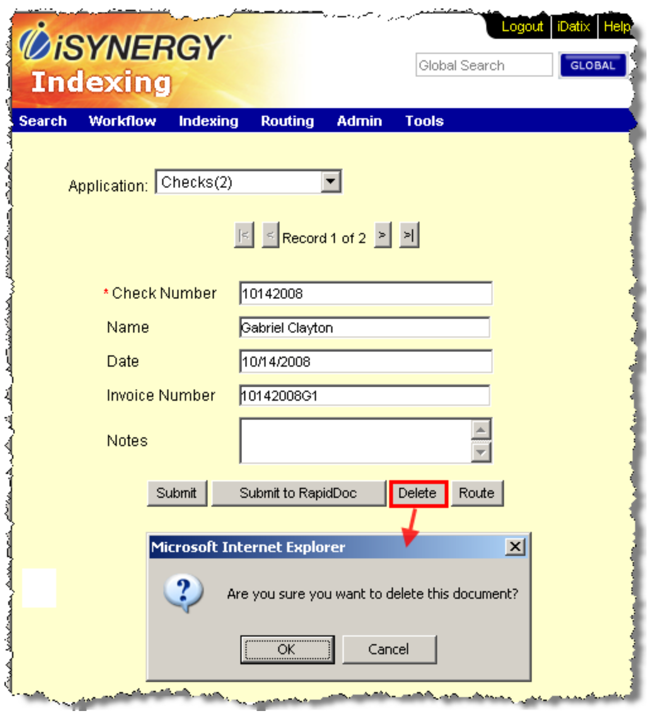
To submit an Indexed Document to iSynergy, click **Submit.**



Note: After a Document has been submitted, the Indexing Page automatically launches the next Document from the indexing queue to the viewer to continue indexing.

Delete

Use **Delete** to remove a Document from the Indexing queue.

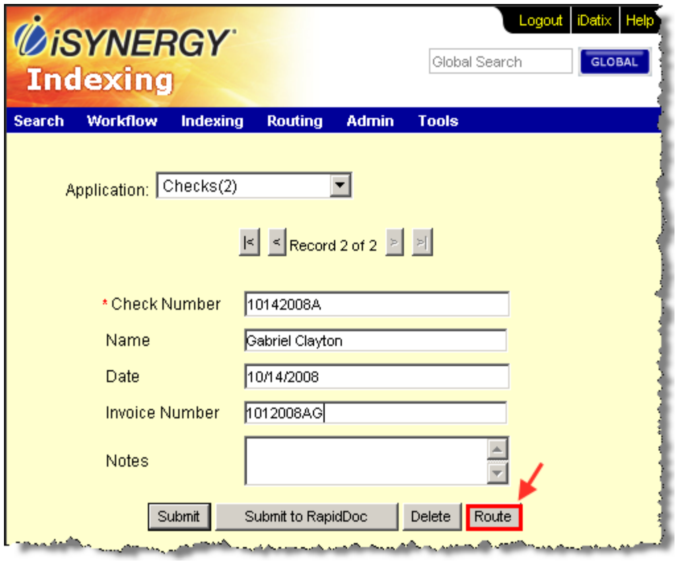


Documents deleted from the Indexing queue receive a soft delete. Users must have permissions to perform a soft delete. To perform a hard or permanent delete of a Document from iSynergy requires additional granted permissions,

Note: When a Document has been soft deleted the Indexing page, the next document loads in the Indexing queue for processing.

Route

Occasionally misclassification of a Document occurs after scanning, or it may be sent to the wrong Inbox during Pre-sort General Capture. The **Route** option allows data entry personnel to route the Document to the proper Application.



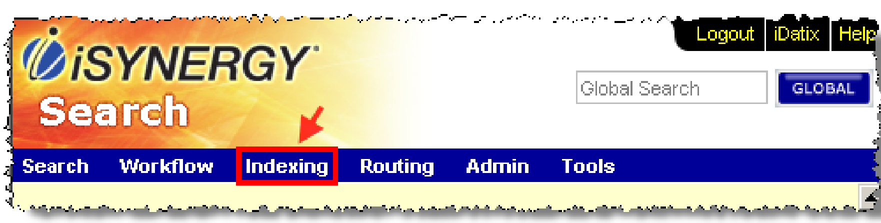
Note: When a document has been routed, all the previous index values are lost. For more information regarding routing, please review the Routing section of this manual.

Access the Indexing Page

Access and functionality of the Indexing page is determined by user permissions.

To access the Indexing page, follow these steps:

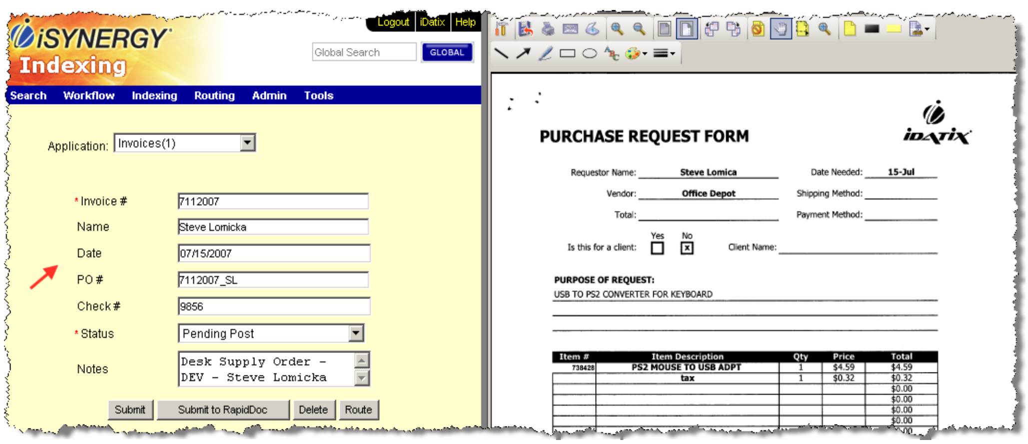
1. From the iSynergy Menu bar, select **Indexing**.



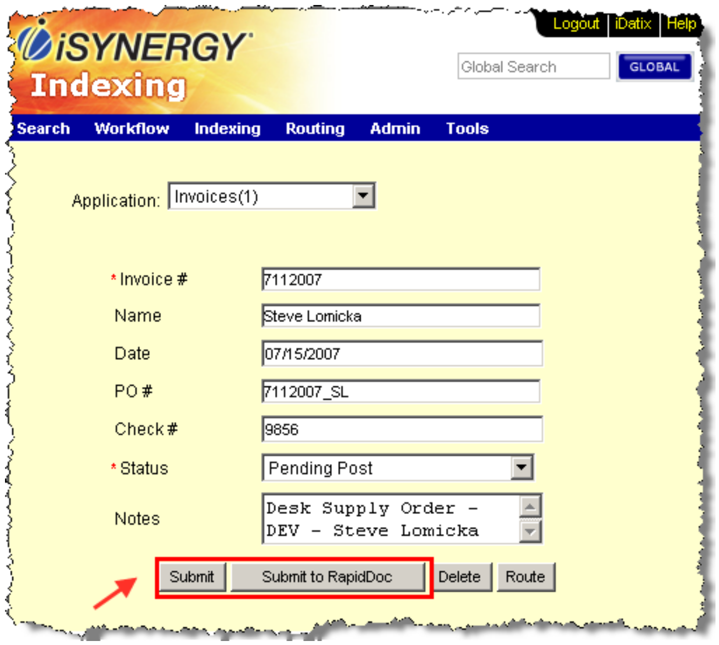
2. Click the Application selector and choose the appropriate **Application**.

Note: The Application with Documents that require indexing loads.

1. Enter the correct Index values for the Document.



2. Select **Submit**.

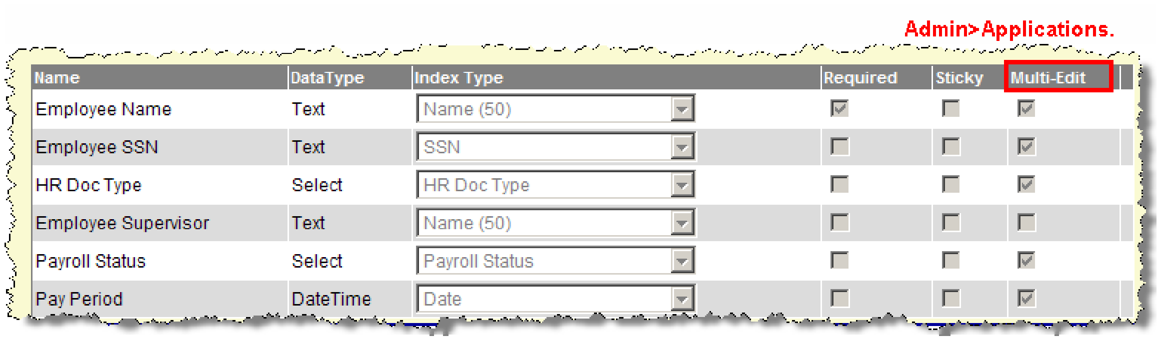


Note: Depending on your process, you may elect to Submit to iSynergy or you may Submit to RapidDoc.

Multi-Edit Function

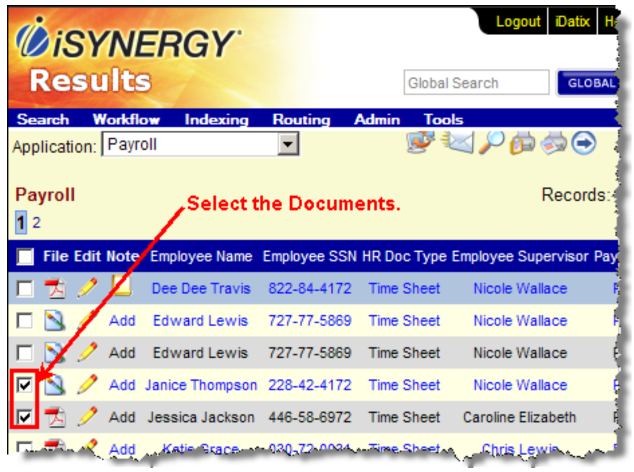
The Multi-Edit function provides a (permissions granted) user the ability to edit an Index value for multiple Documents simultaneously.

Note: To edit multiple documents at one time, when the Application was set up and the indexes created, the administrator must have selected the multi-edit functionality.

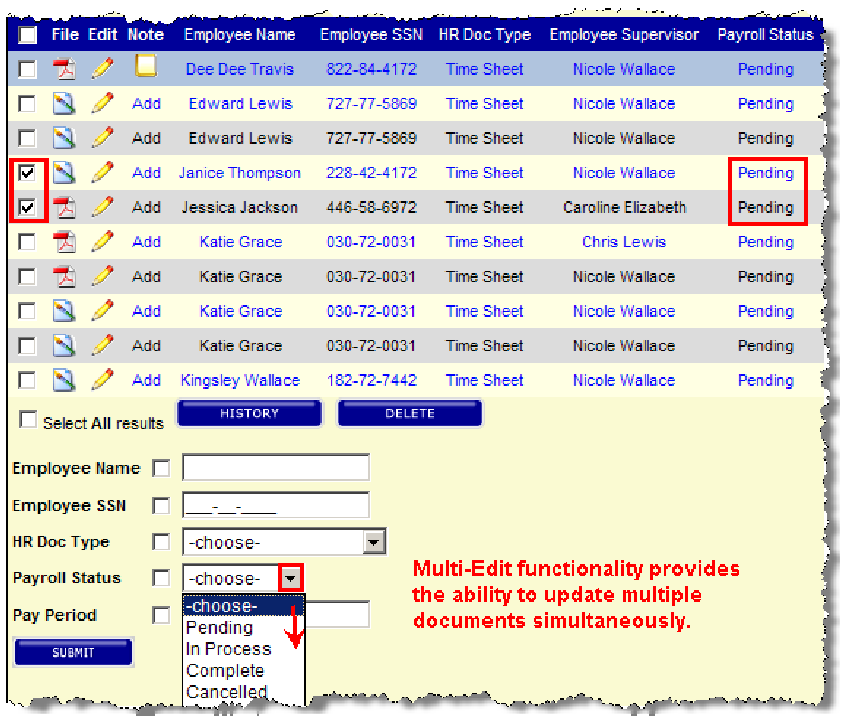


To use the Multi-Edit function:

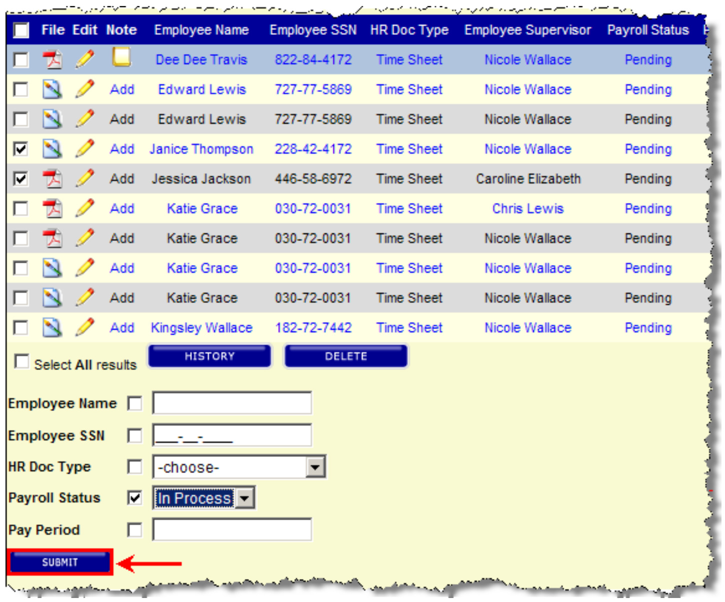
3. Select the appropriate **Document checkboxes**.



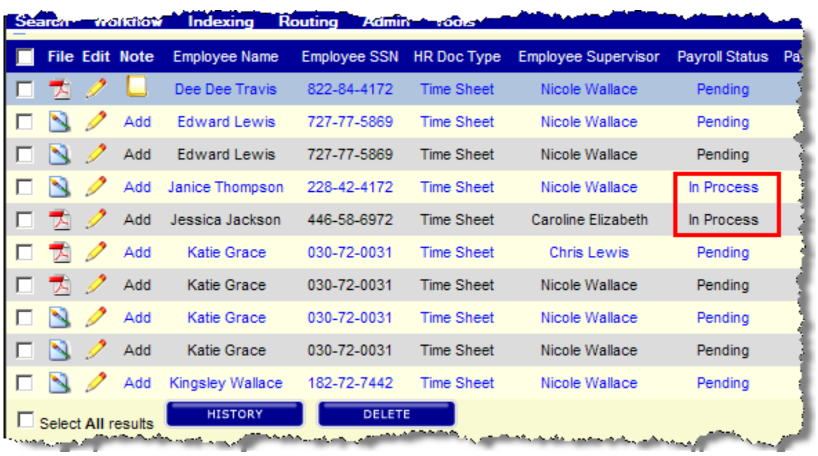
4. Make the appropriate changes.



5. Select **Submit**.



6. The Application Pane refreshes and displays the changes made.



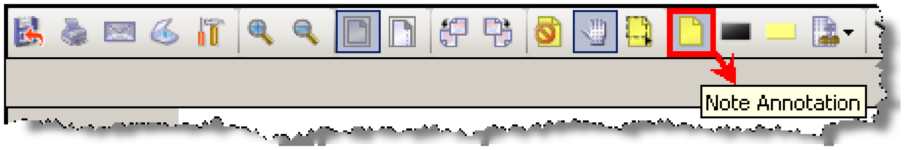
Annotations

Seven buttons in the top toolbar allow you to create and manage these annotations. They include:

- Insert Annotation
- Insert Redaction
- Insert Highlight
- Insert Rubber Stamp
- Hide Annotations
- Pan
- Select Annotation

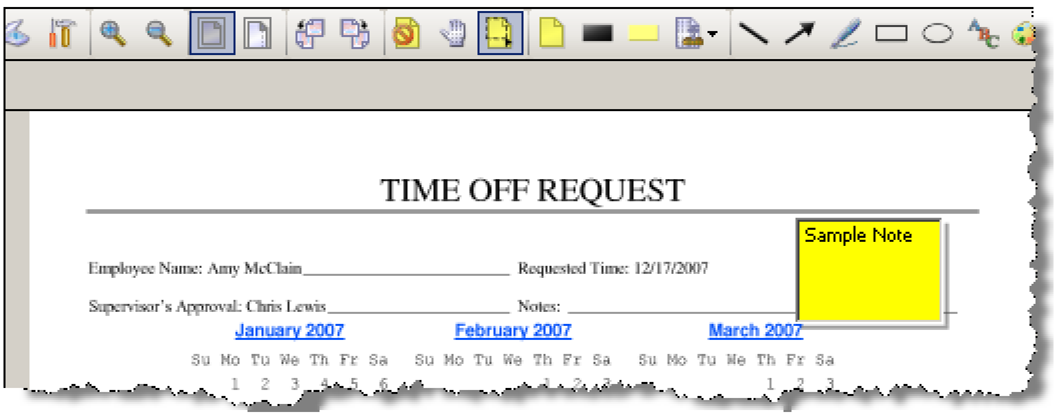
To insert a note annotation, follow these steps:

7. Select **Note Annotation**.



8. Draw a box of any size and drop it anywhere on the image.

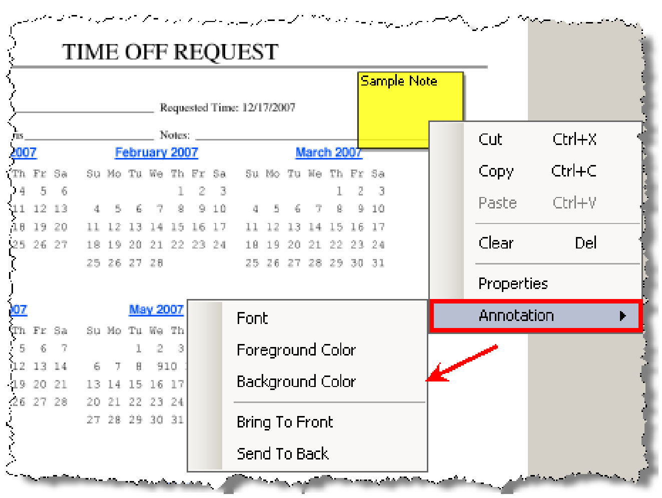
9. Type a notation message in the yellow text box.



To edit a note annotation, follow these steps:

10. Right-click on the Annotation

11. Select the Annotation option.



Note: In the child menu, options exist for making changes to the font, foreground and background color, as well as moving the annotation front or back. From the parent drop-down menu, the user may also cut, copy, and clear the Annotation.

If you select Text or Background Color from the submenu, the palette displays.

Annotation Properties

iSynergy annotations have extended properties that are modified by right clicking on the selected annotation and choosing the appropriate property from drop-down menus.

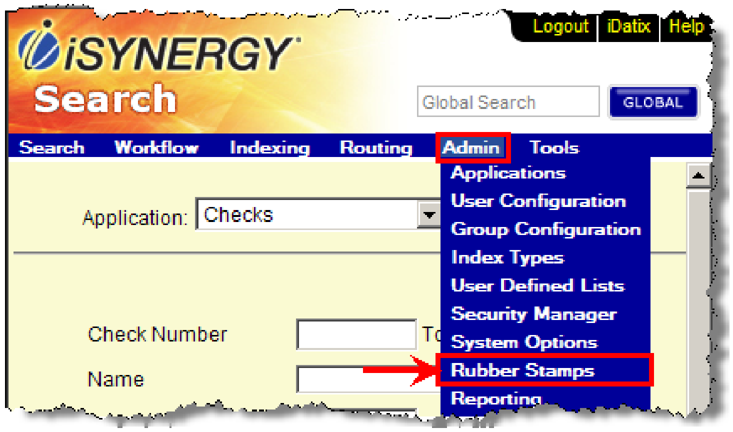
Properties included in the parent drop-down menu include:

- **Cut**– Removes the selected annotation from the Document. An annotation that is Cut can however be pasted to another region of the current Document by subsequently using the Paste command.
- **Copy** – Copies the selected annotation for a subsequent Paste.
- **Paste** - Places the most recently copied or cut annotation on the Document.
- **Clear** – Removes the selected annotation from the Document. This removal is permanent and the annotation is not stored in the clipboard for Paste.
- **Properties** – Selecting Properties activates a pop-up menu containing the Text and Line options. The Text option allows you to edit the content of the text currently entered in note annotations, but not the font or size of the associated text. The Line option allows you to edit the thickness of lines associated with inserted Rectangles, Ellipses, Arrows, and of course, Lines. Properties included in the child drop-down menu of the Annotations option include: Font, Foreground Color, Background Color, Bring to Front, and Send to Back as seen in Figure 92.
- **Font** – Selecting font activates a pop-up menu containing options to edit various font attributes of the text in annotations.
- **Foreground Color –** Changes the foreground color to that selected within the color palette. The foreground color of note annotations corresponds to the color of text contained within the note. For shapes, lines and arrows, the foreground color corresponds to the color of the line associated with the boundary of the shape or the line itself.
- **Background Color** - Changes the background color to that selected within the color palette. The background color of Notes corresponds to the color of the Note. For shapes, the background color corresponds to the “fill” color of the shape.
- **Bring to Front –** Moves the selected annotation to the front. This allows for placement of one annotation “on top” of another.
- **Send to Back -** Moves the selected annotation to the back. This allows for placement of one annotation “behind” others.

Creating and Modifying Rubber Stamps

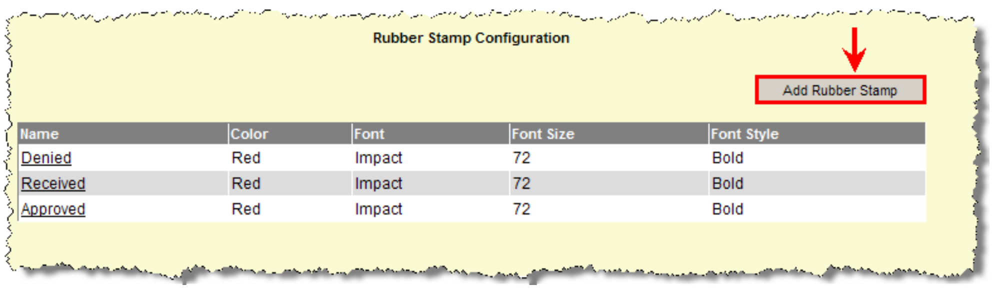
To create a rubber stamp, follow the steps below.

1. On the iSynergy Menu bar, navigate to **Admin>Rubber Stamps**.



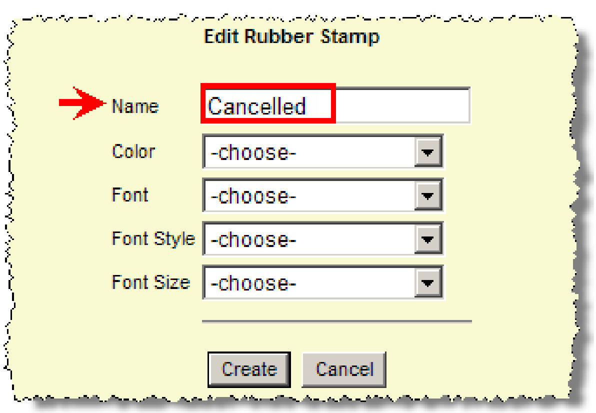
Note: The Rubber Stamp Configuration dialog displays. There are three default rubber stamps available: Denied, Received and Approved.

2. Select **Add Rubber Stamp**.

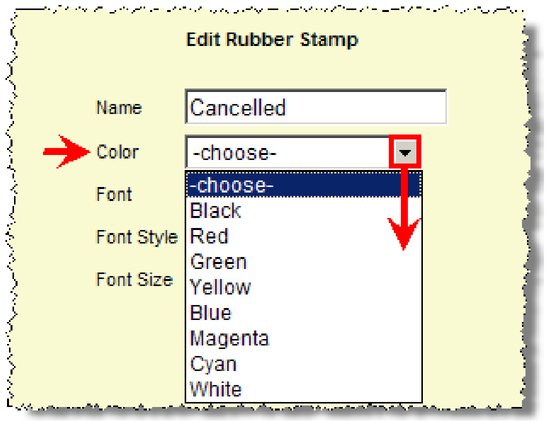


Note: The Edit Rubber Stamp page displays.

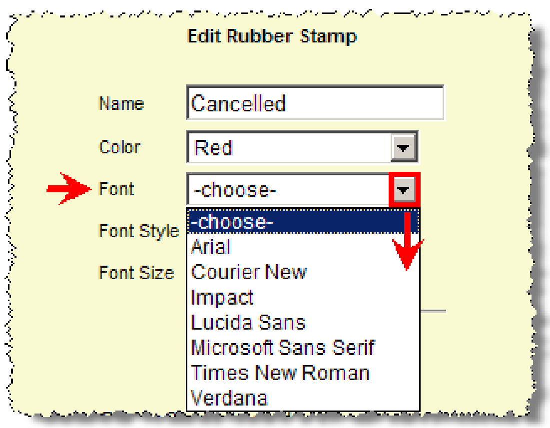
3. Define the Rubber Stamp **Name**.



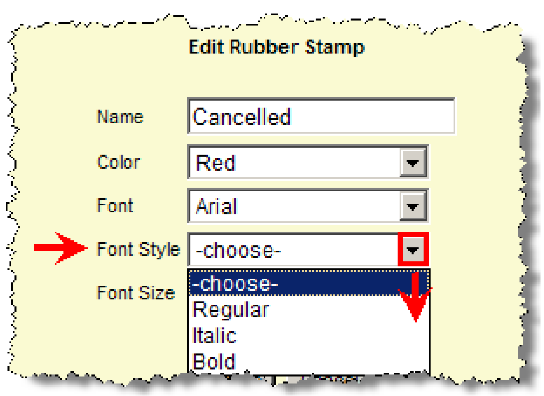
4. Press tab and select the **Color Drop Down** menu.



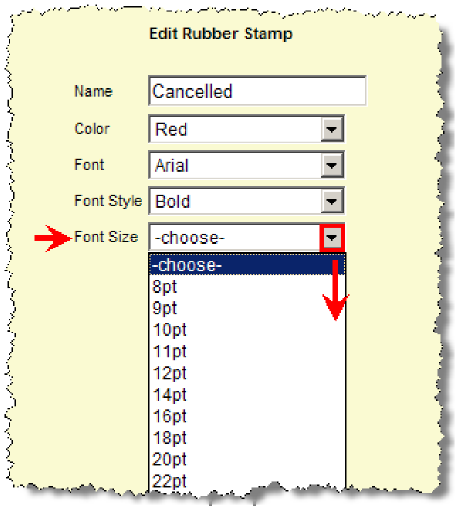
5. Press tab and select the **Font Drop Down** menu.



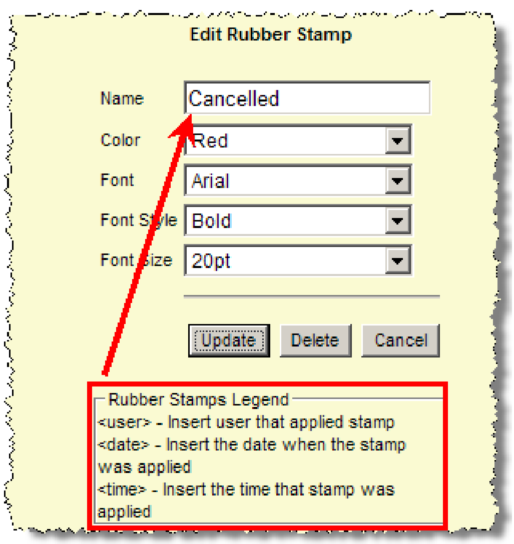
6. Press tab and select the **Font Style Drop Down** menu.



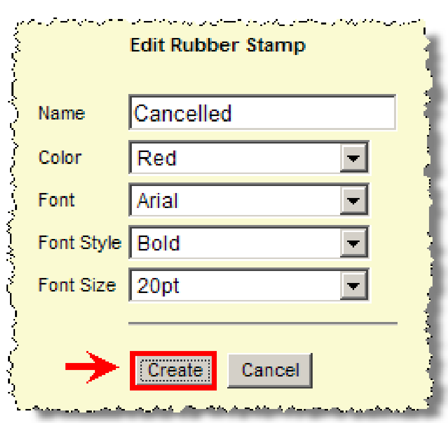
7. Press tab and select the **Font Size Drop Down** menu.



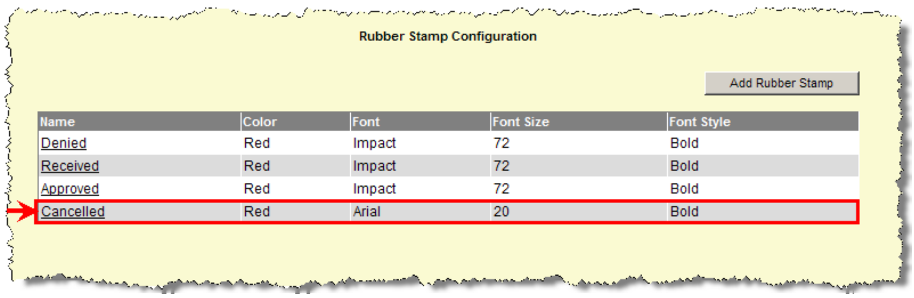
Note: Additionally, you can use the Rubber Stamp Legend to provide additional information for the Rubber Stamp display option.



8. Select **Create.**



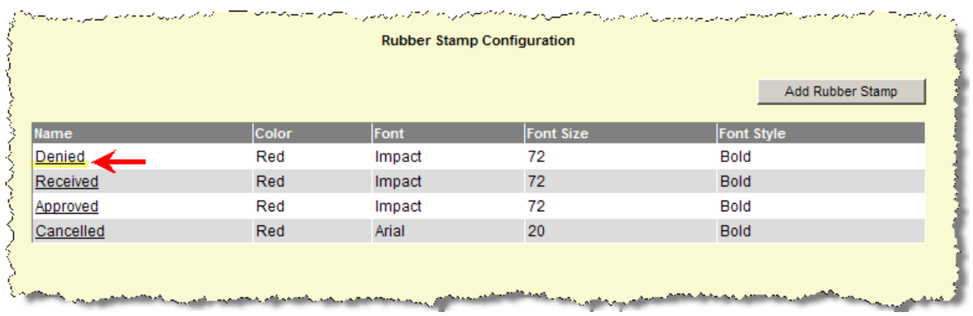
9. The new rubber stamp displays in the Rubber Stamp Configuration dialog.



To edit a Rubber Stamp, follow these steps:

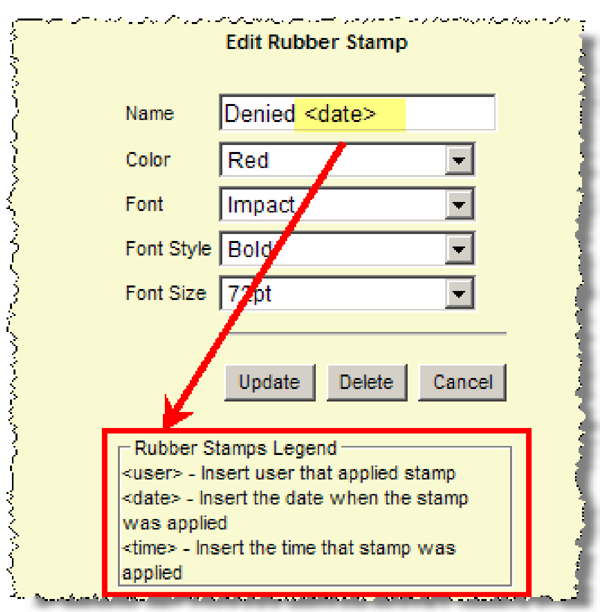
10. On the iSynergy Menu bar, navigate to **Admin>Rubber Stamps**.

11. Select the appropriate **Rubber Stamp Name Hyperlink.**



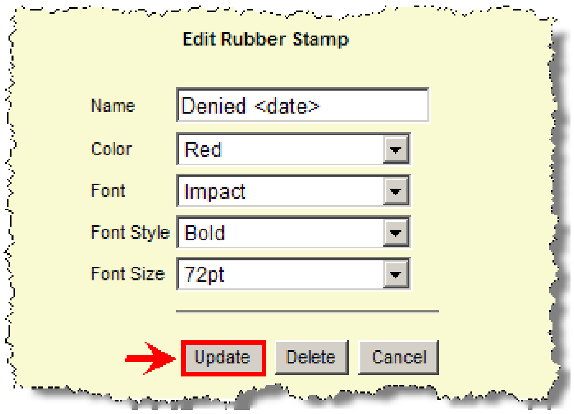
Note: The Edit Rubber Stamp dialog appears.

12. Make the appropriate changes.



Note: The Rubber Stamps Legend provides the ability to add additional information to the Rubber Stamp display options.

13. Select **Update**.



Data Transfer

The Export option displays the available export configurations for the Documents selected from the search results.

Documents can be exported from iSynergy to remote locations via FTP (File Transfer Protocol) across the Internet. For security purposes, only Users with granted permissions can export Documents from iSynergy.

> *Note: For more information regarding user permissions, please review the Permissions section of this manual.*

Once documents have been received, the imported Documents can easily be viewed and searched (assuming Index values were included in the export) with the use of CDViewer. Once you have gathered the required information for data transfer, such as a target IP address, it is very easy to implement a data transfer from iSynergy.

iDatix Client Support Services recommends that you follow these steps in order:

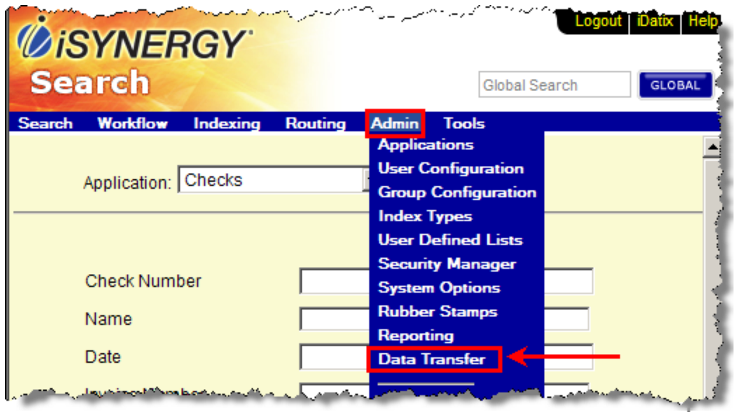
1. Create local Directories on the Server to store
2. Create new FTP Configurations (if required).
3. Create Export Configurations.

Create a Data Transfer Configuration

Before you can transfer Documents, you must create the appropriate Export and FTP configurations.

To create a data transfer configuration, follow these steps:

1. On the iSynergy Menu bar, navigate to and select **Admin>Data Transfer**.

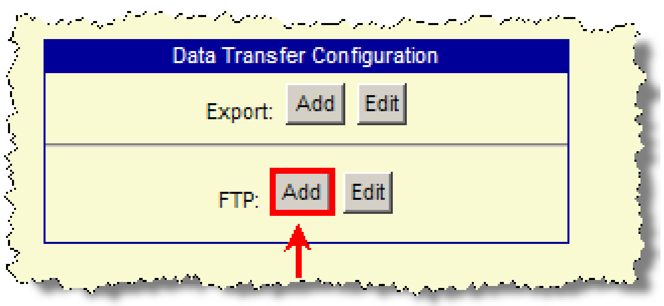


Note: The Data Transfer Configuration dialog displays, providing the ability to add or edit the configuration settings for Export and FTP. Additionally, the order in which you add a new Export or FTP configuration is not critical, but if the goal is to transfer Documents using FTP, it is useful to setup the FTP configuration first.

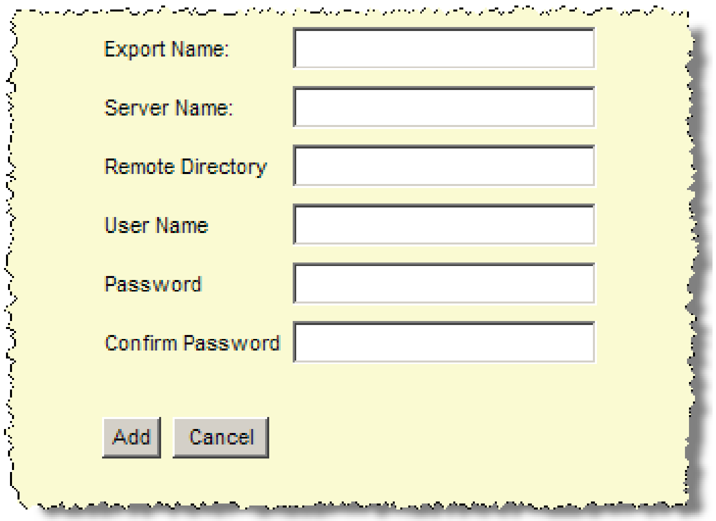
Setting the FTP Configuration

To configure an FTP configuration, follow these steps:

1. Navigate to the FTP dialog pane and select **Add**.



Note: The FTP Configuration dialog displays.



2. Define the Appropriate information for the FTP.

Note: Please refer to the below Element/Description Table for field explanations.

3. Select **Add**.

Descriptions of each of the fields within the FTP Configuration page follow:

Element	Description
Export Name	Displays the named export file.
Server Name	Displays the FTP location that you will pull information from.
Remote Directory	Enter the directory on the remote site to which the files are to be transferred.
Username	Displays the user name
Password	Provides the ability to define the users' password.
Confirm Password	Provides the ability to confirm the defined users password.
Add	Saves the newly created FTP configuration.
Cancel	Cancels the Action

Setting the Export Configuration

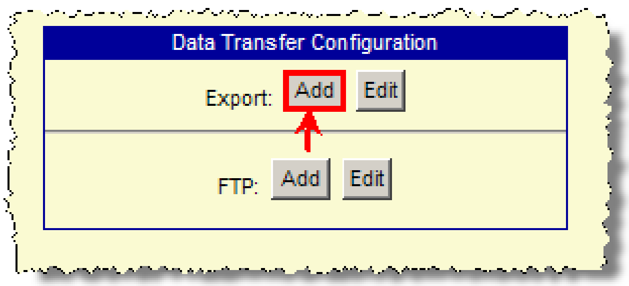
After you have determined the FTP information, you are ready to define the export configuration.

1. Navigate to iSynergy Menu and select **Admin>Data Transfer**.

    Note: The Data Transfer Configuration dialog displays.

2. Navigate to the **Export** pane.

3. Select **Add**.



Note: The Export Configuration dialog displays. Please review the below table for Element/Description information.

Element	Description
Application	From the drop-down list of available Applications, select the Application that contains the data to you wish to export.
Export Name	Enter a name for the export configuration. It is suggested that the name include the company to which the data will be exported or some other unique characteristic.
Directory	Enter the directory where the files are to be stored. This folder will be used as a source file for the FTP transfer. Note: This directory reflects the server's file system.
FTP	Select the desired FTP configuration (for FTP transfer only). The FTP will need to be configured on the *FTP Configuration* page and saved before it displays in the drop-down list.
Zip Files	Select this option if you want the exported files to be compressed using Zip format. If the files are going to be transferred via FTP this checkbox is marked by default.
Include application	Select this option to export information about the application from which the images are exported. (Used when exporting information from one

Element	Description
information	iSynergy database to a different iSynergy database).
Include column headings	Select this option to include column headings in the export file.
Include images	Select this option to include copies of the image files in the export.
Indexes to be Exported	Select the index information to be included in the export file.
Select All	Selects all options and indexes listed.

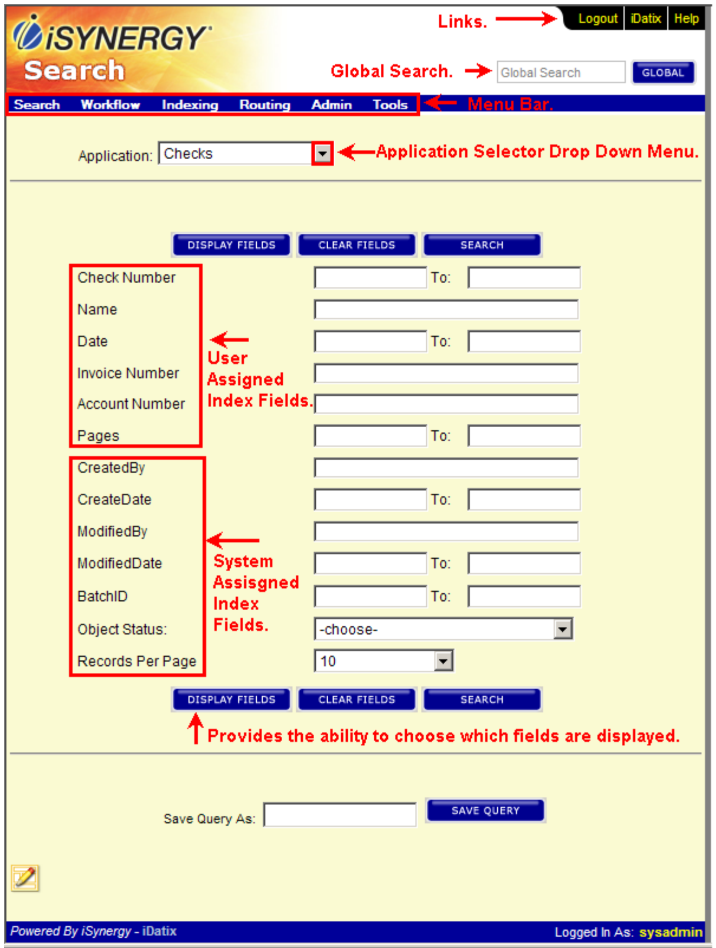
Searching for Documents

Productive search and retrieval processes are central to iSynergy's functionality. A query in iSynergy is the act of performing a search to retrieve target-specific information from the iSynergy database. Similar to a search performed on the internet, a query within iSynergy retrieves Documents according to search criteria, called Index values.

A search query begins with submission of an Index value, such as a date or social security number. iSynergy examines the database for Documents with matching Index values and returns the results.

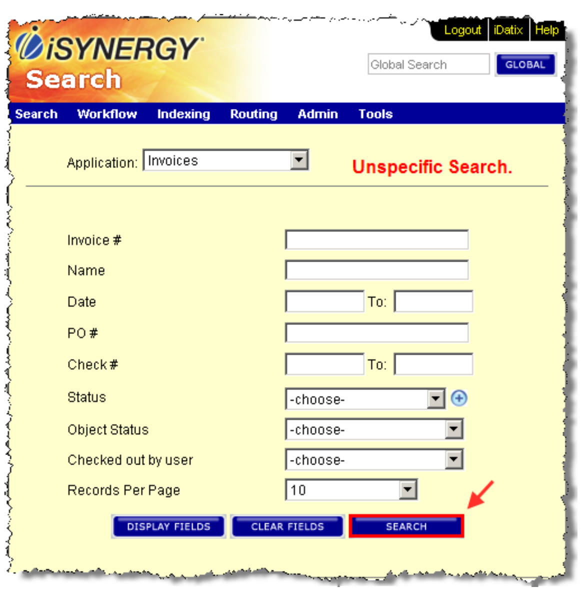
By default, the Search page loads following a successful log in.

> *Note: Menus and fields displayed on the Search page may vary per user depending on permissions granted to each user by the administrator.*

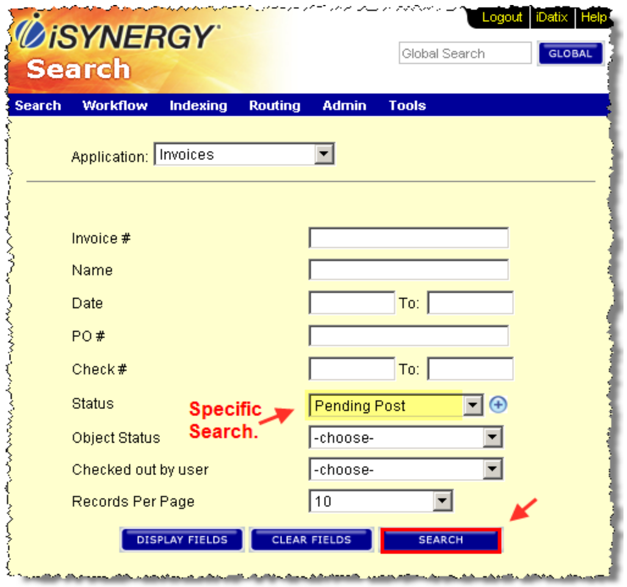


Simplicity and efficiency are two goals of the iSynergy search functionality. There are five main types of searches performed in iSynergy:

- **Unspecific Search.** No Index values are used. This search is performed within a specific Application.



- **Specific Search.** One Index value is used. This search is performed within a specific Application.

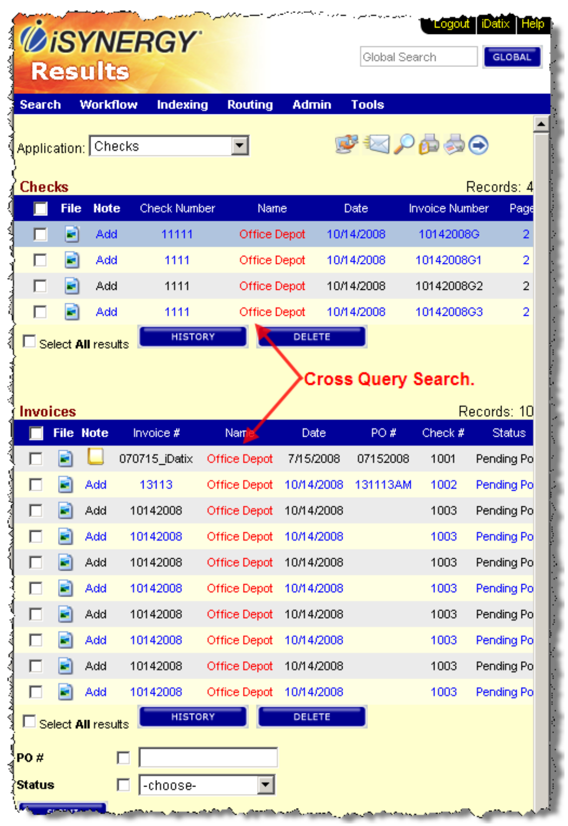


- **Complex Specific Search.** Two or more Index values are used. This search is performed within a specific Application.

- **Global Search.** A search across all enabled Applications for a given index value, regardless of Index Name or Type. This search is capable of incorporating multiple Applications.

Note: Global Searching is often dependent upon a User's permission and the Application permission. For more information regarding permissions, please review the Permissions section of this manual.

- **Cross Query Search.** A search across <u>all</u> enabled Applications for a given index value, but limited to a single Index Name. This search is capable of incorporating multiple Applications.



Note: Cross Query Searching is often dependent upon a Users' permissions and the Application permission. For more information regarding permissions, please review the Permissions section of this manual.

Unspecific, Specific and Complex Specific searches are always performed within an explicitly chosen Application. Wildcards can be used to expand the search parameters of Specific and Complex Specific searches when the absolute value of an Index is uncertain.

Global searches and Cross Query searches apply across all enabled Applications in iSynergy for which a user is granted Application permissions. Global and Cross Query searches share some similarities and have some important differences. Both types search across all enabled Applications (for which a User is granted Application permissions). However, a Cross Query search is limited to returning search results that share the same Index Name, while a Global Search will return matching Index values among all enabled and permissible Applications regardless of the Index Name.

> *For example, two separate Index Names (displayed as Index Value column headers the Results table) may exist that share a common value. One Index Name called 'Mortgage Status' and another called 'Hire Status' may share a common Index value 'Active'. A Global search performed for 'Active' will return matching results from both 'Mortgage Status' and 'Hire Status'. A Cross query search performed for 'Active' within 'Hire Status' will return matching values from only the selected Index Name, in this case 'Hire Status'.*

Unspecific Search

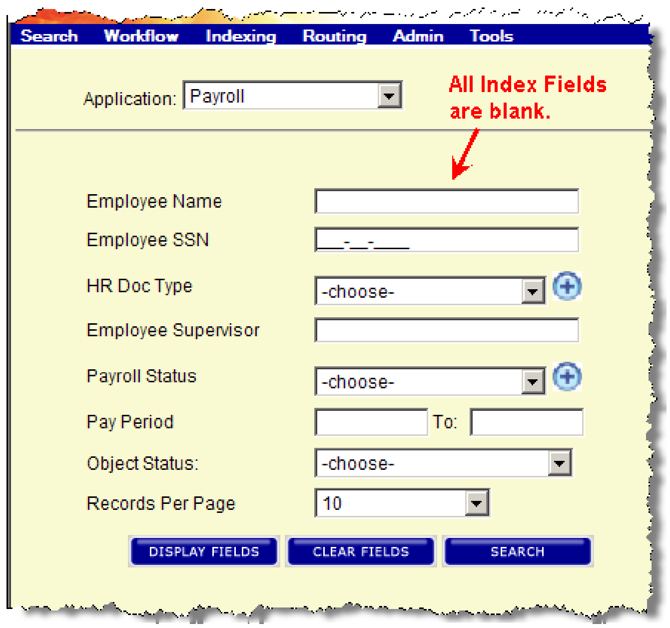
An Unspecific search is performed by submitting an empty query string within a selected Application. Submission of an Unspecific search within iSynergy returns all the records in the selected Application up to the first 10,000 records (dependent on Admin settings).

To execute an Unspecific search within an Application, follow these steps:

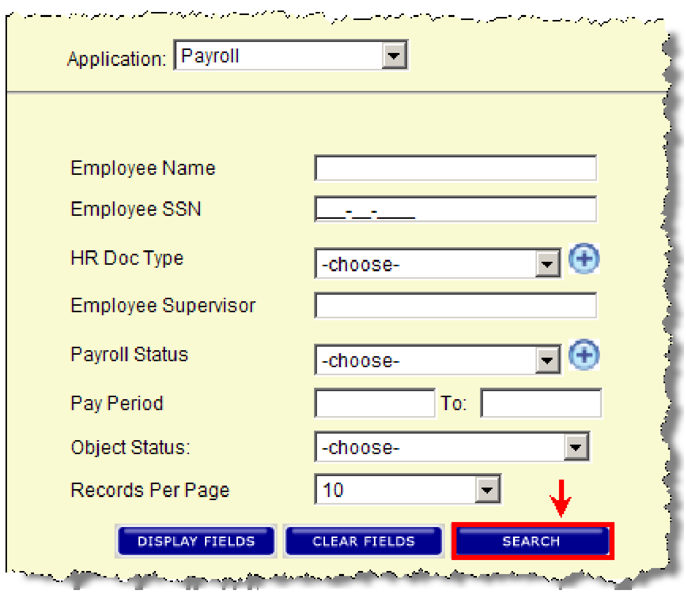
1. Navigate to **iSynergy Menu** bar.
2. Select **Search**.

3. Choose the desired **Application**.

4. Ensure that all index fields are empty and that no value is selected for any UDLs.

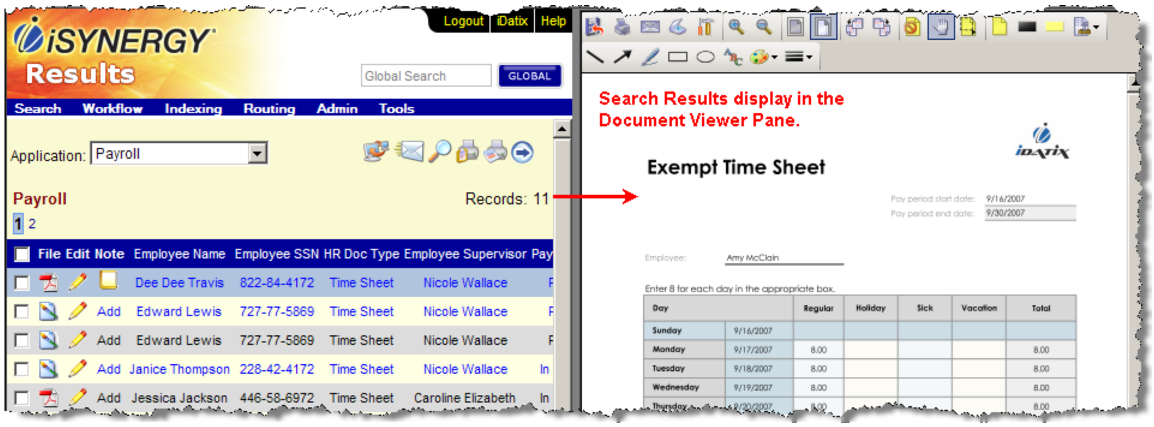


5. Click the **Search** button.



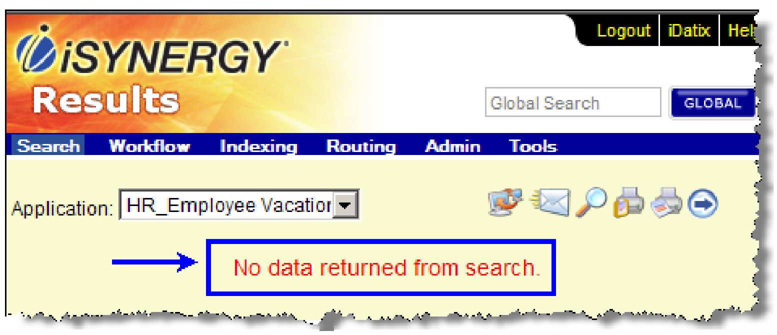
6. Results of the search are returned and displayed on the Document Viewer Pane.

Note: By default, the first Document listed in the table is highlighted in dark blue with its first page displayed in the Document Pane.



Following a successful search (returning at least one match), the Results page displays the result(s) in the Results table.

Note: If no data is available, the user is alerted via the Application Pane.



Specific Search

A Specific search refines and narrows results by returning only Documents whose Index values match those submitted during the search. Values can be entered into a standard field as a text or numeric value, selected from a UDL drop-down list, or entered in a range field.

To execute a Specific search inside an Application, follow these steps:

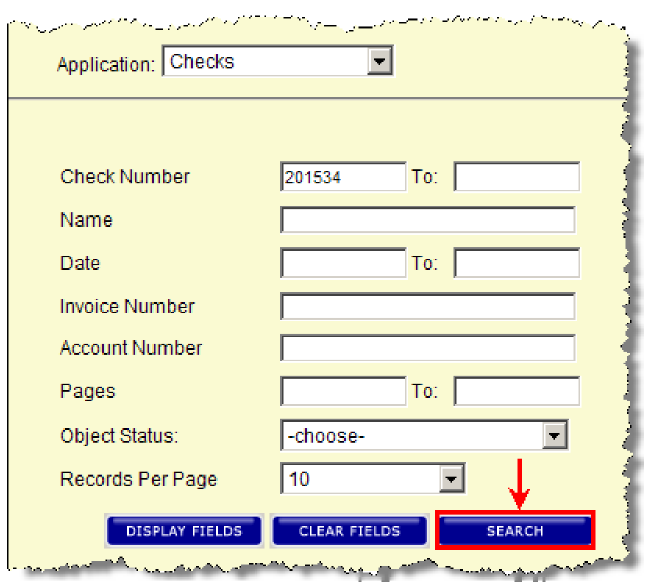
1. Navigate to **iSynergy Menu** bar.

2. Select **Search**.

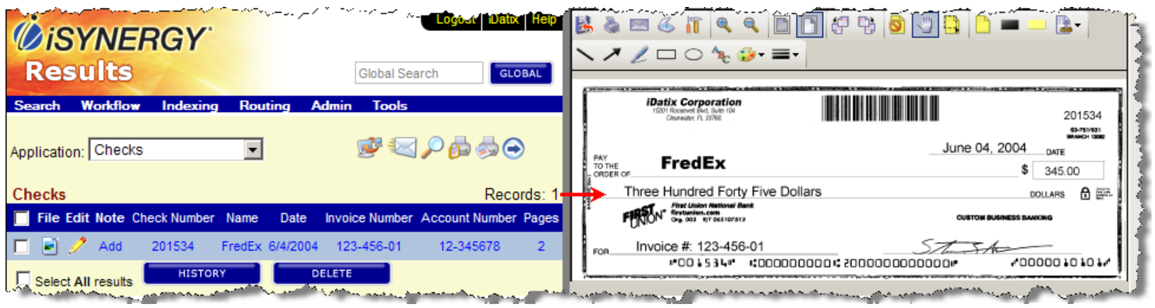
3. Choose the desired **Application**.

4. Enter or select a value from a standard, drop-down or range field.

5. Click **Search**.



6. The desired Document displays in the Document Viewer Pane.



Complex Specific Search

A complex Specific search is the most specific search performed within iSynergy. A Complex Specific search makes use of multiple Index values.

*Remember that iSynergy only returns results that match **all** of your Index values.*

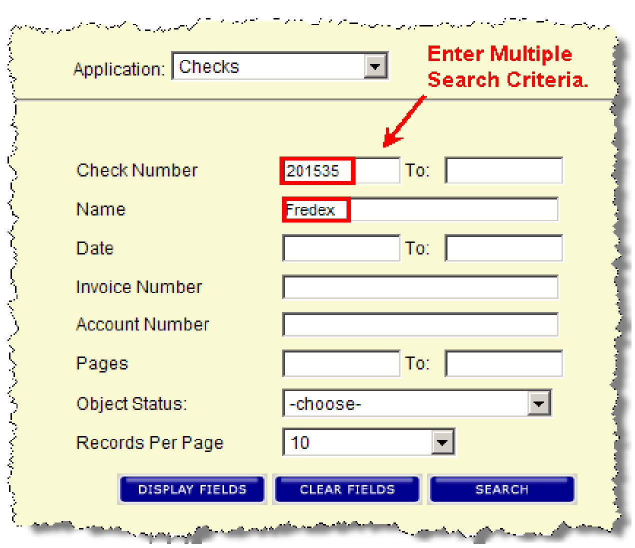
To execute a Complex Specific search, follow these steps:

1. Navigate to **iSynergy Menu** bar.

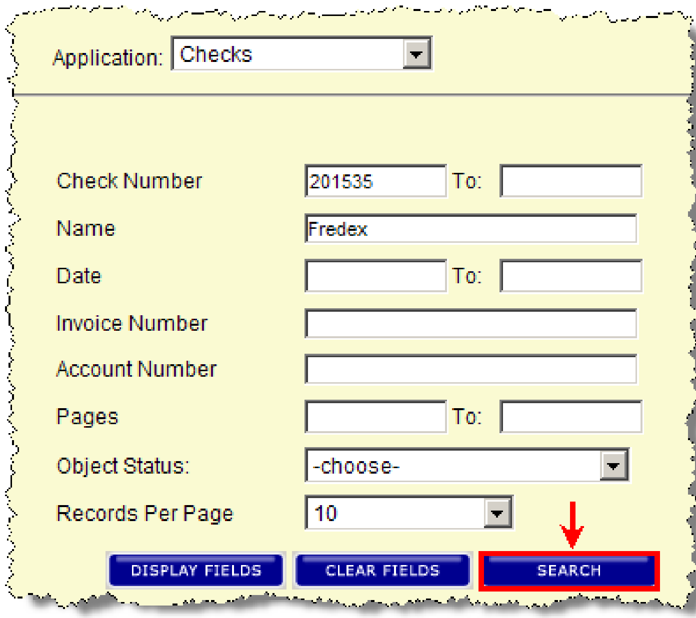
2. Select **Search**.

3. Choose the desired **Application**.

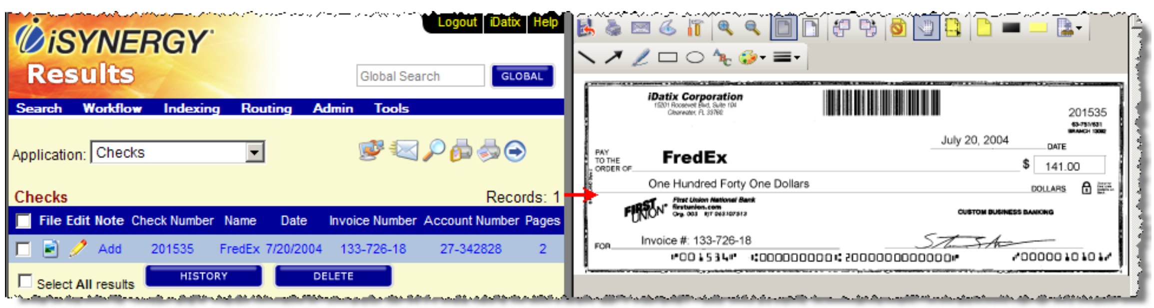
4. Enter **Search Criteria Values** in the Index fields.



5. Click **Search**.



6. The Document Viewer Pane displays the Document.



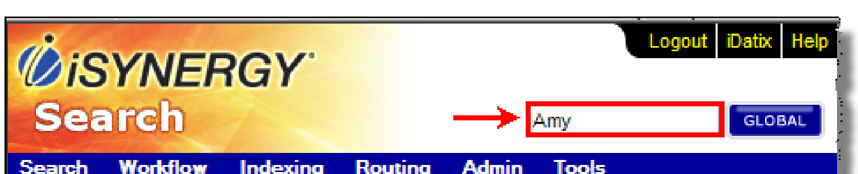
Global Search

Global searches are performed across all enabled Applications for which the User has access permissions. Index values matching the search criteria will be returned regardless of the Index Type and Index name associated with the Index value following a Global search.

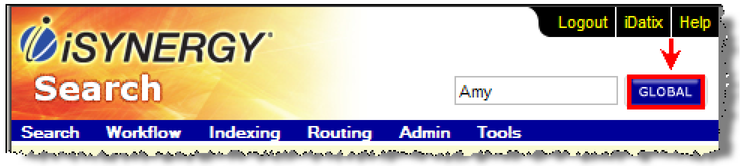
The Global Search Tool is located at the top of the Search page and rests just below the Links Bar.

To execute a Global Search, follow these steps:

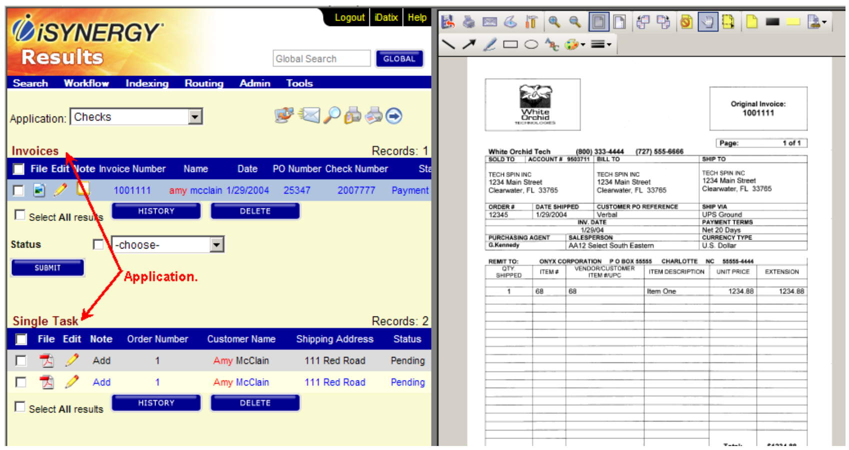
1. Enter an Index value in the Global Search input field.



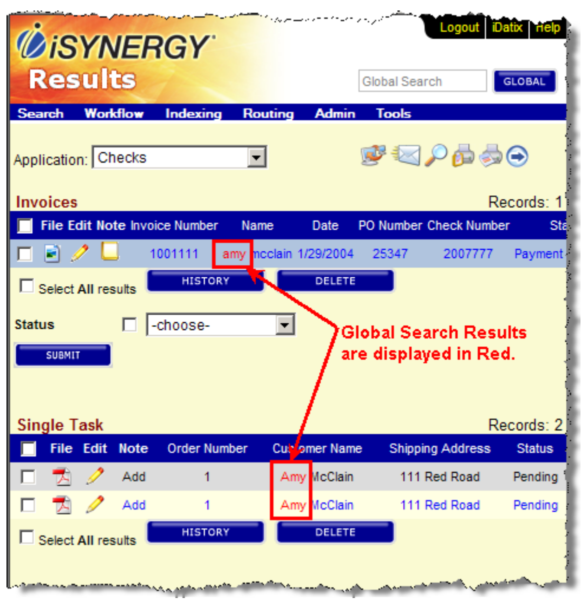
2. Select **Global**.



3. Matching values are returned for each Application enabled with Global Search functionality that the User has been granted access permissions.



Note: Global Search Results are Simple to Discover; they display in red.



Global searches can also be performed with less specific search criteria. No wildcard symbols are necessary for this approach. Making use of a less specific search term broadens a Global search and may prove useful when you are not certain of the exact Index value, but are aware of the beginning string of letters or numbers associated with the Index value.

Cross Query Search

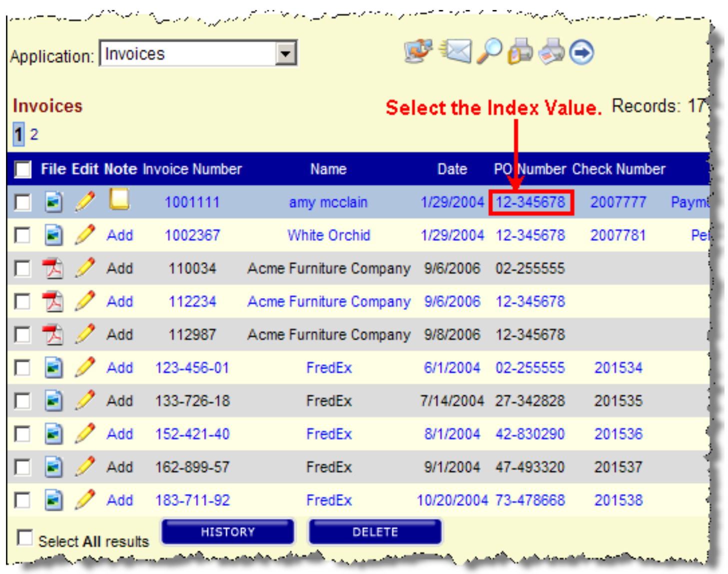
You may recall that each Index value displayed in a Results table is a hyperlink. Clicking an Index value in the Results table begins a Cross Query search for that Index value. Clicking an Index value contained in a Results table is the only method available to perform a Cross Query search. No Index field is available on the Search or Results pages to enter search criteria to begin a Cross Query search.

A Cross Query performs a search across all enabled Applications (that a user has been granted access permissions) for matching Index values that share the same Index Name as the Index value chosen to initiate the search. Cross Query restricts search fields to only those Index Names you wish to have searched.

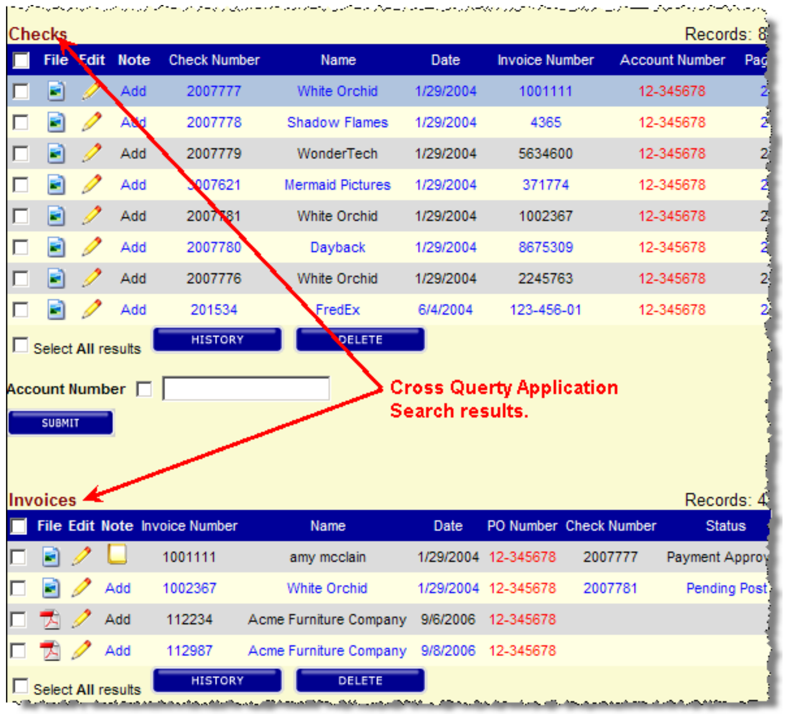
> *As an example, if two Index Names exist, one called Document Status, the other called Hire Status, share a common UDL value of 'Active', a Cross Query search of 'Active' initiated from the Column with Index Name of Hire Status will only return matching results from Applications with the Index Name Hire Status. A Global search for the term 'Active' would have returned matching values from both Document Status and Hire Status.*

To perform a Cross Query search, follow this step:

1. Click the Index value you wish to Cross Query search from the Results table.



2. The Cross Search Results display.



Results of a Cross Query search are listed in table(s) with the Application name above its respective table. The Index value used for the search displays in red in its respective Index Value column. Notice that the Index Value column header (synonymous with Index Name) is the same for both returned results. This will always be the case when performing a Cross Query search.

Wildcard Searches

A wildcard search extends search capability in iSynergy by allowing searches to be performed using incomplete search strings. In a wildcard search the asterisk character is used to replace the unknown portion a search string entered in an Index field.

The table below outlines the possible uses of the wildcard asterisk:

Element	Description
a*	Returns any character string beginning with the letter a
***a**	Returns any character string ending with the letter a
a	Returns any character string containing the letter a
9*	Returns any character string beginning with the number 9
***9**	Returns any character string ending with the number 9
9	Returns any character string containing the number 9

Note: Wildcard searches are useful when you only know a portion of the information you want to search. Perhaps you remember only the first three digits of a check number you wish to find. If so, you could enter the first three digits followed by a wildcard (123).*

Additionally, wildcards are not used with Global searches. For Global searches simply enter the incomplete search term in the Global search text field. There is no need for a wildcard asterisk. A Global search will return all values that begin with search string entered. For example, when the search string ‘ja’ is used for a Global search it will return Documents with Index values such as ‘Jake Edwards’ and ‘James Thomas’ because they both begin with ‘ja’.

In-Application Wildcard Search

To execute a wildcard search from within an Application, follow these steps:

1. Choose the Application and the Index field you want to search.
2. Enter the known characters of the Index value and include (only) one asterisk to replace all the unknown character values, whether the unknown characters are limited to the beginning of the search string, the end of the search string, or occur both.
3. Click **Search**.

Full Text Search

Full Text search allows fast and flexible indexing for a key word based query that is stored in the iSynergy Repository. feature incorporates “Google-like” search functionality for Documents that have received FullText processing. FullText searches allow a User to search for specific search strings within a Document independent of the Index values assigned to that Document.

Full Text searches are not case sensitive**.** However, when using search clauses to increase the functionality of a search, the search clauses themselves are case sensitive.

Six search clauses can be used in conjunction with Full Text Search. These include:

AND Search

By default, a User can enter a single word during a Full Text Search. The server then returns Documents that contain occurrences of that specific word. However, when the user enters two or more words as search criteria the server returns only those Documents that include occurrences of all words contained in the search. The AND clause is implied between each word in a multi-word search phrase.

For example, performing a search with the search phrase ‘White Orchid’ will return only Documents contain both the words white and orchid in their content. A Document containing only the word ‘white’ or only the word ‘orchid’ would be excluded from the search results.

OR Search

An ‘OR’ search is much different than an ‘AND’ search. The User must manually enter an OR (case sensitive) clause between each word in this type of search string for it to succeed. Without the ‘OR’ statements between words in the string, the string will be interpreted by default as having ‘AND’ clauses between consecutive words in the search string. When ‘OR’ is placed between search terms, Documents with occurrences of any word within the search string will be returned.

For example, searching for ‘white OR orchid’ returns Documents that contain either the word white or orchid.

Quoted Search

A Quoted search allows the user to search for a specific phrase. This is different from an ‘AND’ search in that the order of the words in the search phrase are maintained. A ‘Quoted’ search is performed by enclosing a worded phrase in double quotes. When a User searches for a quoted phrase, the server returns Documents that contain exact matches of the worded phrase.

For example, searching for ‘“the cat jumped over the fox”’ returns only Documents that contain the string ‘the cat jumped over the fox.’ Documents containing all the words contained in the phrase, but not in the order quoted, will not be included in the search results.

NOT Search

In a ‘NOT’ search, the User attaches a minus sign before a word to exclude any Documents that contain that word.

For example, searching for the term ‘Reptiles -lizards’ would yield all Documents that contain ‘reptiles’ but excludes Documents that contain ‘lizards.’

Wildcard Search

A wildcard search consists of a word with a character attached that acts like a wildcard. If the User enters a word with an asterisk attached, then the server will return Documents that contain that word or other words that contain that word.

For example, searching for ‘He’ returns Documents that contain the occurrence of ‘He’, ‘Hello’, ‘Help’, etc.*

Combination Search

A combination search consists of a query with two or more search predicates.

For example, an AND, OR, and wildcard search can be combined in one query. For example, the query string: “white orchid OR flam “is a perfectly acceptable query.*

Microsoft SQL Search ignores certain words. Words ignored by SQL search are listed in the Table below.

- Punctuation marks such as colons (:) and semicolons are ignored.
- Single letters (a, b, c) and digits (0, 1, 2, 3) as well as symbols ($ % ^?) are also ignored.
- Commas are not allowed and you may not search for quotation marks.

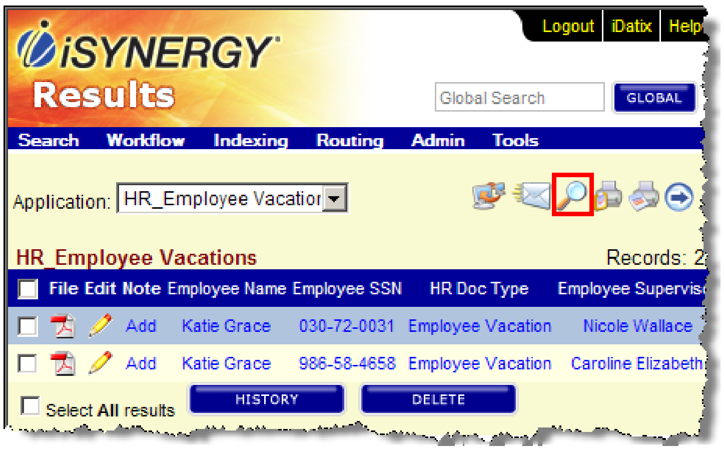
  Single quotes are recognized and treated as a character within a word.

about	be	come	he	is	my	said	the	too	which
after	because	could	have	it	never	same	their	under	while
all	been	did	her	like	now	see	them	up	who

also	before	do	here	make	of	should	then	very	with
an	being	each	him	many	on	since	there	was	would
and	between	for	himself	me	only	some	these	way	you
another	both	from	his	might	or	still	they	we	your
any	but	get	how	more	other	such	this	well	
are	by	got	if	most	our	take	those	were	
as	came	has	in	much	out	than	through	what	
at	can	had	into	must	over	that	to	where	

Last Search

The Last Search option re-executes the most recent query.



Query Manager

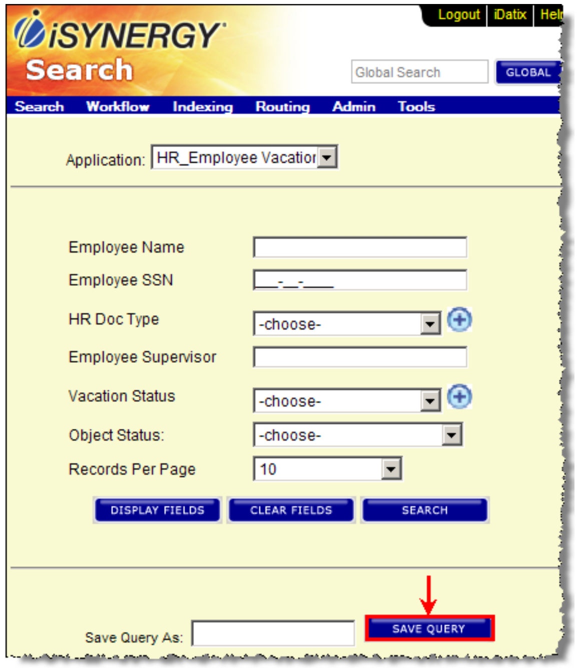
Query Manager is a feature of the Search page and provides quick and convenient access to commonly used search queries. When a User is granted account permission for Query Manager, the feature is available on the Search page underneath the active Application's Index fields. Query Manager is Application specific and User Account specific. Each User Account stores saved queries for the specific Application in which they were created. Query Manager is a utility that stores commonly used search queries to help the user:

- Load the Application to search.
- Populate the desired fields for the search.
- Enter a descriptive phrase in the Save Query As field to easily identified saved queries.

Save a Query

To save a query, follow these steps:

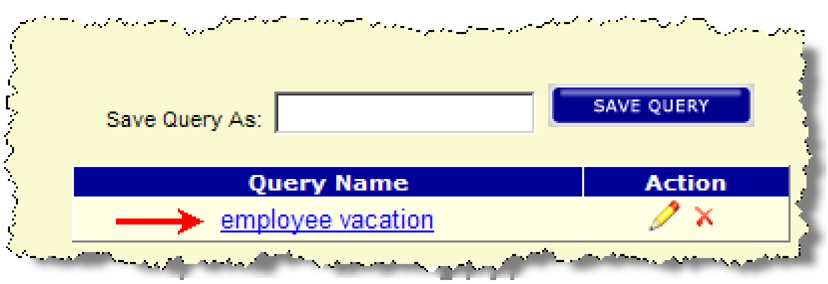
1. Enter search value(s) in the desired Application's Index fields.
2. Enter the name of the query in the **Save Query As** field in Query manager.
3. Click the **Save Query** button.



Execute a Saved Query

To execute a saved query, follow this step:

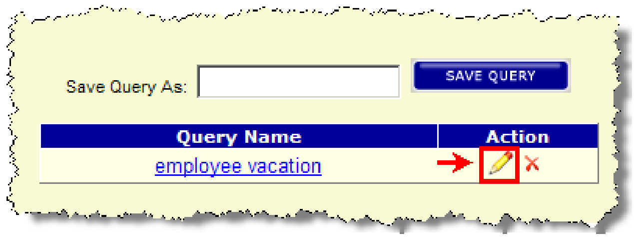
1. Click on the desired query from the Query Name column in Query Manager.



Modify an existing Query

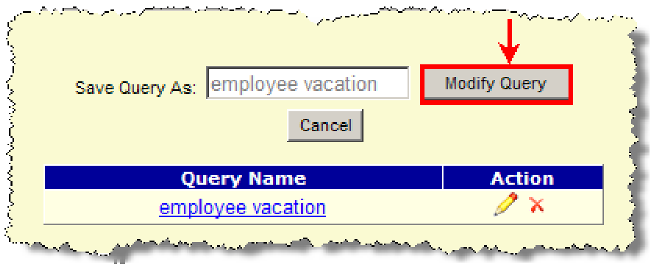
To edit a query, follow these steps:

1. In the Search Pane, navigate to the Query Name.
2. Select the **Pencil**.



3. Make the appropriate changes to your index fields.

4. Select **Modify Query**.

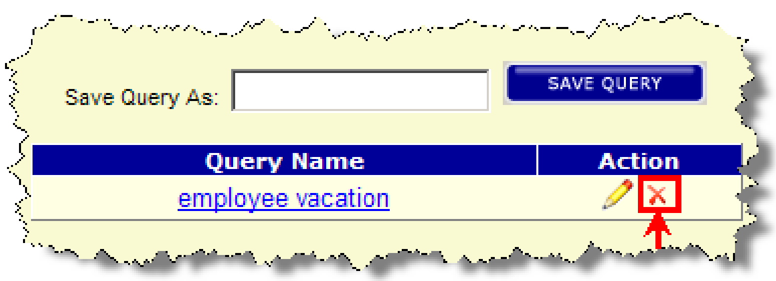


Delete a Saved Query

To delete a saved query from the Query Manager, follow these steps:

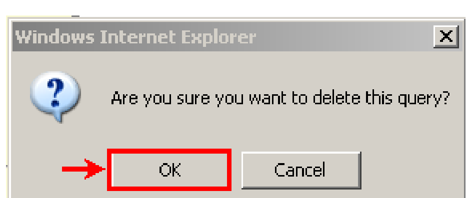
1. In the Search Pane, navigate to the Query Name.

2. Select the Red X.



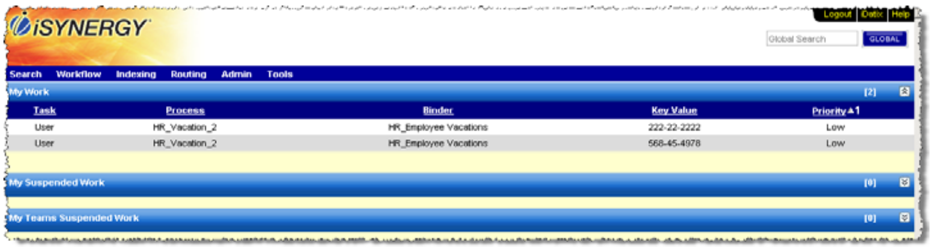
Note: A Windows Internet Explorer dialog window displays.

3. Select **OK**.



Workflow

Workflow is a defined series of tasks required to produce a desired outcome. Workflow applies many of the concepts of factory automation and industrial engineering to the process of work management in an office environment. At each stage in the workflow, an individual or group is responsible for a specific task or set of tasks. A status change occurs once the tasks are complete. Individuals responsible for the next task receive notification of status change.



They receive the data they need to execute the next stage of the process. The result is increased productivity, increased control of the process and data, and elimination of the inefficiencies associated with manual handling of Documents.

Workflow Design

It is possible to define workflow processes within the iSynergy environment. You can define assignments and statuses than can be used to drive business processes and track process metrics to generate reports on productivity, work status and states of your business operations.

The most important step in iSynergy workflow implementation is a thoughtful analysis of current office procedures. A detailed outline of each step and associated task(s) in the targeted business process is the basis of a sound workflow design in iSynergy. Careful analysis can expose inefficiencies and guide you toward creating more productive processes and methodologies. These outlined steps enable you to combine tasks in logical sets or stages that reflect the flow of Documents throughout the organization.

When setting up your Applications, it is important to consider how Documents flow through your process and define the necessary user elements to gain the greatest power and benefits from your iSynergy implementation.

Use a combination of two different kinds of elements to implement Workflow in iSynergy:

- Status Changes
- Personnel Assignments

Both of these features are incorporated into the design of your Applications in the form of User Defined Lists (UDLs).

> *Note: For more information regarding Workflow design, please refer to the Progression Advanced User Manual.*

Status Changes

Each status name in a UDL represents a stage in the workflow process and that stage is an associated set of tasks represented by an index value. An individual or group who has completed their assigned stage of the workflow process usually initiates a status change. It is a signal used to tell the subsequent individual or group in the next stage of workflow that they may begin their assigned set of tasks.

Usage Scenario: A manufacturing company wishes to track and manage customer orders. The following points list the different departments and associated tasks that are required to fill a customer order from order placement to receipt of payment.

1. **Sales Desk.** The sales desk answers the incoming customer call, fills out a Sales Order sheet, and assigns an order number to the order. Scan the Sales Order sheet into the iSynergy system, and assign a status of "Sales Desk" to the Document.

2. **Data Entry.** Data Entry personnel key in all relevant information into the ERP system for the order. After completion of all tasks, status changes from 'Data Entry' to 'Production.'

3. **Production.** Production staff query iSynergy for Documents with a 'Production' status. iSynergy returns all orders with a status of 'Production.' Production staff can print Work Order sheets and begin work on current orders. Once the product is finished, production personnel send the product to Shipping, scan the Work Order sheets into iSynergy and change the status for the unit from 'Production' to 'Shipping.'

4. **Shipping.** Shipping staff query iSynergy for Documents with a 'Shipping' status. They verify units received from production against the list of current orders in iSynergy and complete the tasks associated with delivery of the product to the customer. Change the status of the order from 'Shipping' to 'Invoice' after the shipping of the orders.

5. **Invoice.** Accounting staff search iSynergy for orders with an 'Accounting' status. Invoice processing begins and, after all current orders have had an invoice sent to the customer, accounting staff changes the status from 'Accounting' to 'Review.'

6. **Review.** Review the order. If everything is correct, change the status from 'Review' to 'Closed.'

7. **Closed.** Close the order and it becomes inactive.

iSynergy assigns each step in the highlighted status name and creates a UDL called **Status**

The status names, placed in the correct order and implemented as a UDL in an Application, are called **WorkFlow**. This Application stores all of the Documentation associated with the order fulfillment process.

Note: For more sample workflows, please refer to the Progression Advanced User Manual.

The Results Page

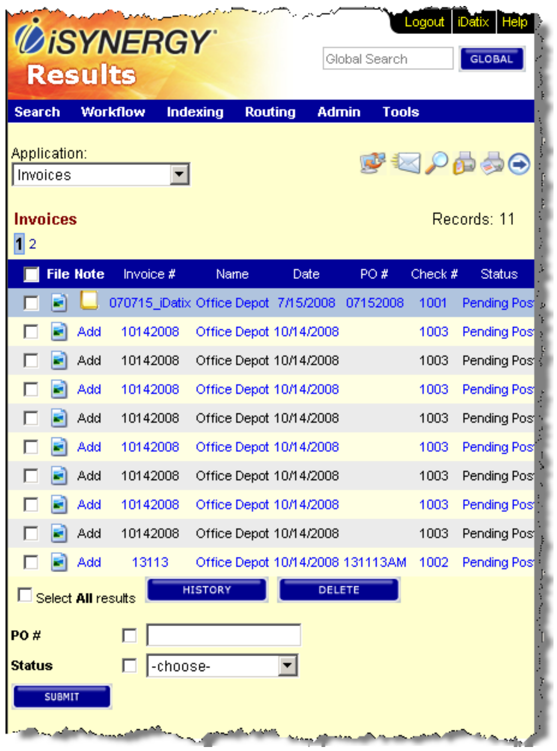
Following a successful query, the Results page displays search results in at least one table.

Note: Results dialog functionality, much like the Search dialog, may vary per user depending on rights and permissions granted to each User by the Administrator.

Functionality of the Results page (dependent on permissions) includes:

- Application Selector.
- Page Indicator.
- Results Table.
- History.

- Multi-Edit Region.
- Export.
- Email.
- Print.
- Toggle Full Screen.
- Last Search.
- Records Indicator.



Application Selector

The Application Selector enables the user to select a different Application from the one currently in use.

Page Indicator

Some searches may return large result sets that require several pages to list all results. The page indicator shows the number of pages associated with a result set and allows for quick navigation through multiple pages of results.

Results Pane

The Results pane is a very commonly used component of the iSynergy system. Each row in the Results table contains Index value information corresponding to a Document.

In addition to viewing the results of a query, a User may utilize the Results table to perform the following tasks

- Select an image of a Document to view.
- Edit a Document's Index values.
- Sort search results by Index values via column header links.
- Initiate a Cross Query Search.
- Select Documents for reproduction via email, printing and export.
- Add a note to a document.

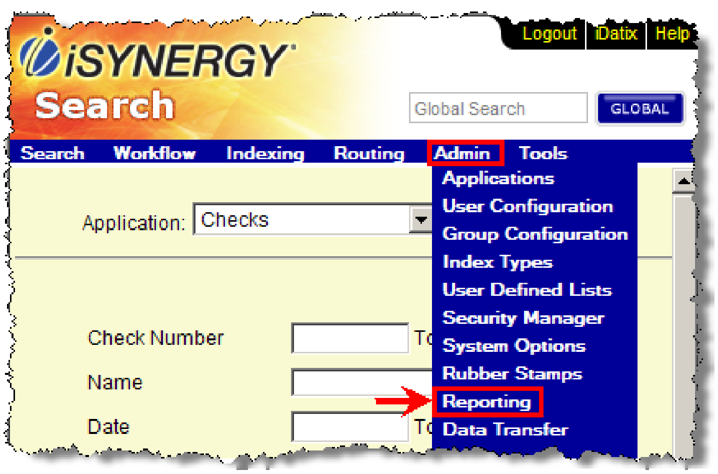
iSynergy Reporting Functionality

Reporting is a useful feature in iSynergy that gathers standard metrics from business processes implemented in iSynergy. Reporting summarizes the data in a meaningful and concise manner. These monitoring features allow managers to examine trends in productivity. By analyzing productivity trends managers can make better scheduling and assignment decisions.

Systematic process improvement requires knowledge of current business process statistics. iSynergy collects process performance data inconspicuously and reports the results on command. The iSynergy database records all significant events associated with every object archived in the Repository, including status changes, personnel assignments, reproduction events (printing, faxing, and email) and annotation events.

> *Note: These events are time-stamped and user-stamped. System Administrators may benefit from auditing the tables that contain information pertaining to events and errors.*

The Report page in iSynergy is a set of predefined report templates. To access the Reporting functionality, navigate to Admin>Reporting.



> *Note: Each template has specific elements that define the content of the report generated.*

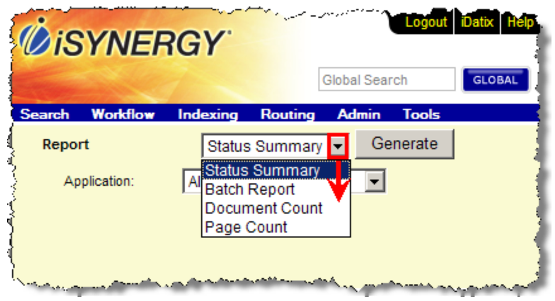
iSynergy Reporting Functionality includes the following report types:

- Status Summary
- Batch Report
- Document Count

- Page Count

For any report you want to generate, complete the following steps.

1. Select the appropriate **Report** type.



2. Select the **Application**.

3. Select **Generate**.

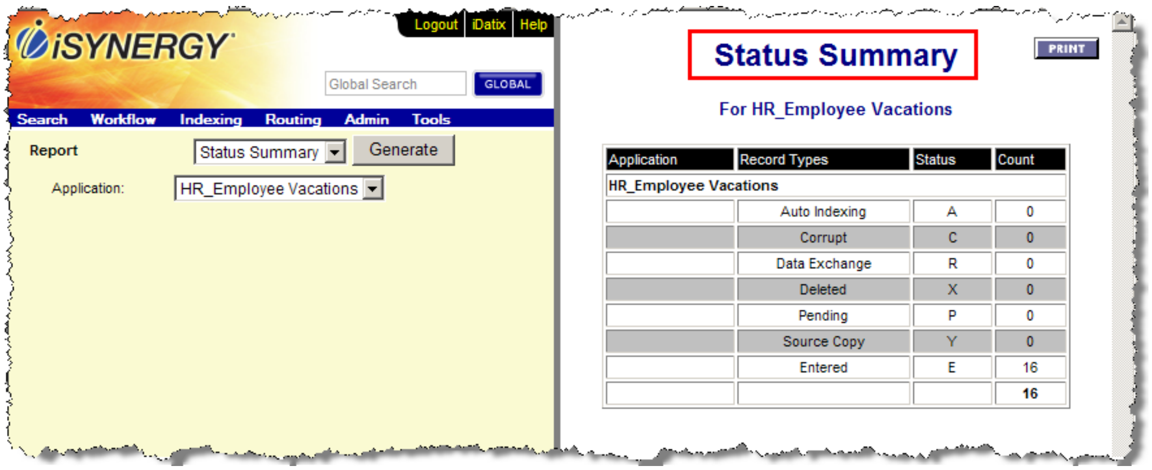
4. The selected report for the selected application displays.

Status Summary

The Status Summary Report displays a summary of the document status within a specific Application in iSynergy.

To display a Status Summary Report, follow these steps:

1. Navigate to iSynergy Menu **Admin>Reporting**.
2. Select the **Status Summary** Report.
3. Select the appropriate **Application**.
4. Select **Generate**.
5. The Status Report Summary displays.



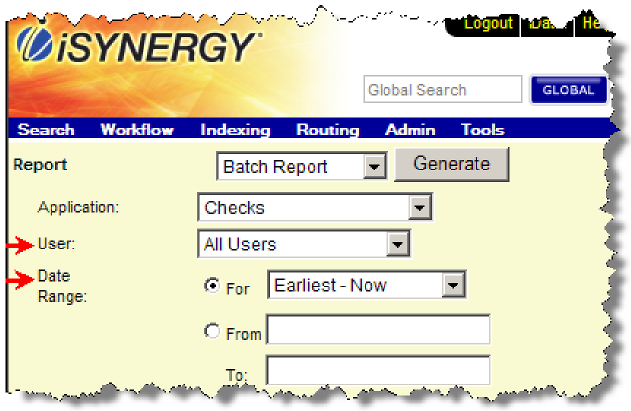
Batch Report

The Batch Report Documents the number of batch scan jobs that are sent to iSynergy by ScanSpeed, the Document scanning application.

To create a Batch Report, follow these steps:

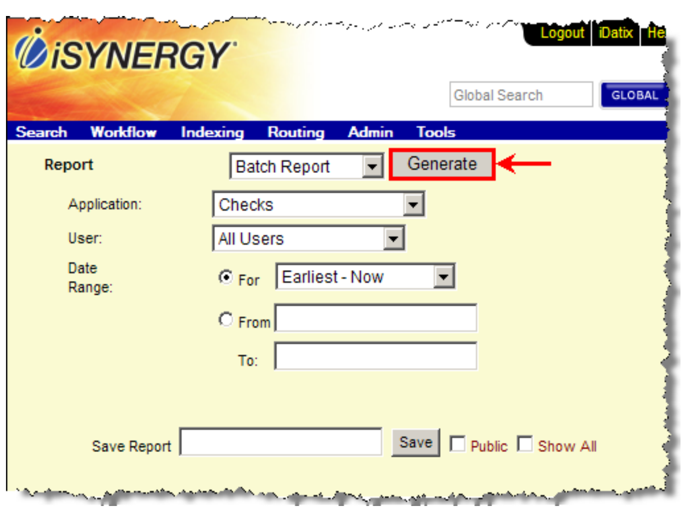
1. Navigate to iSynergy Menu **Admin>Reporting**.
2. Select the **Batch** Report.
3. Select the appropriate **Application**.

Note: You may select additional criteria for the report, such as a User or Date Range.

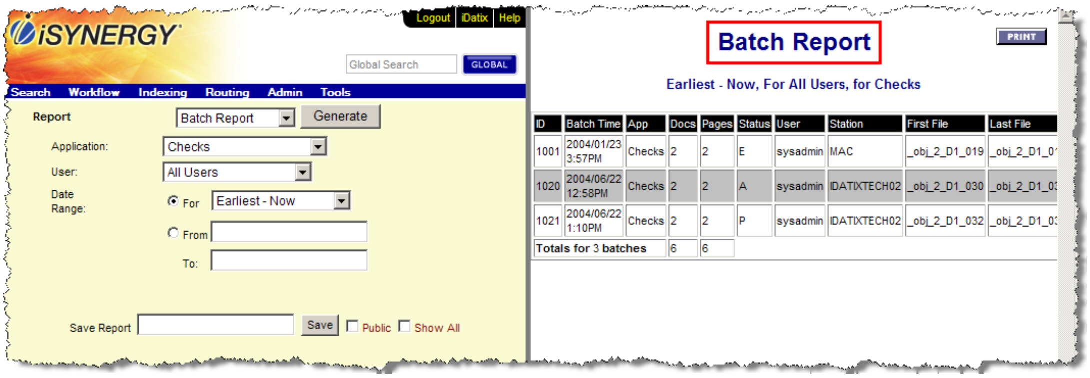


Note: Additionally, you can choose to save the Batch report.

4. Select **Generate**.



The Batch Report displays.

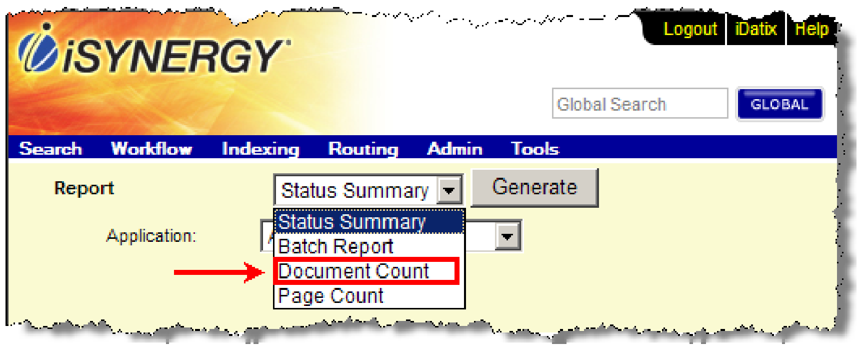


Document Count

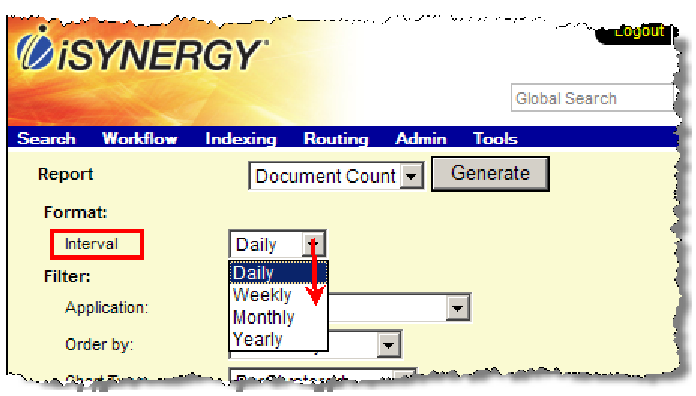
To create a Document Count Report, follow these steps:

1. Navigate to iSynergy Menu **Admin>Reporting**.

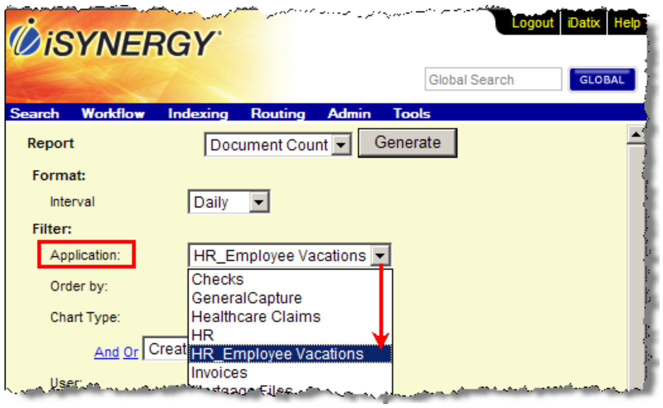
2. Select the **Document Count** Report.



3. Select the appropriate **Time Frame.**

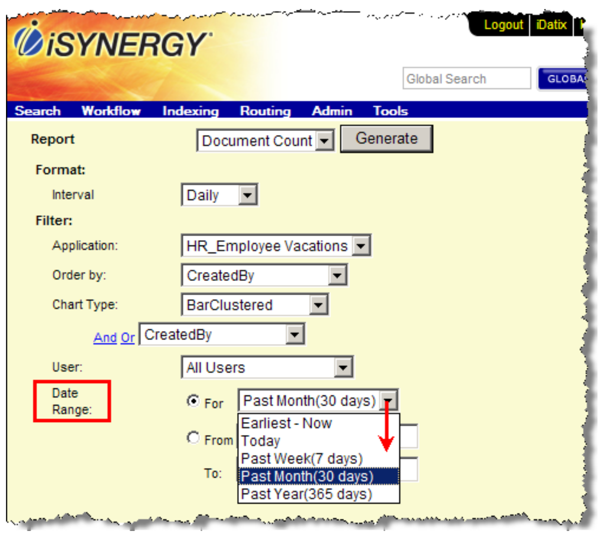


4. Select the appropriate **Application**.

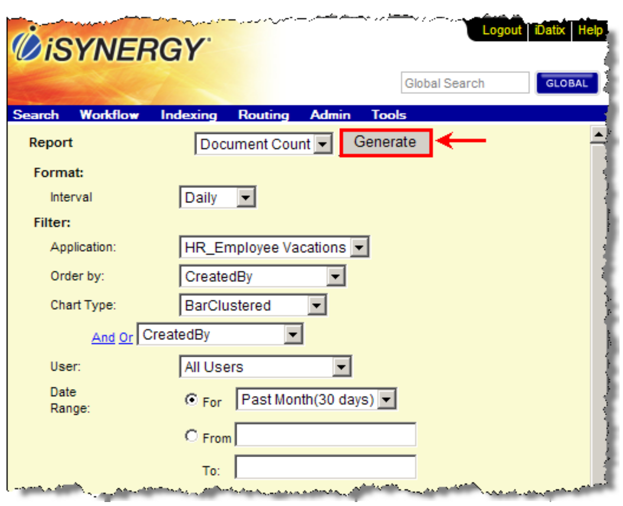


5. If you any additional reporting criteria, select the appropriate drop down menu.

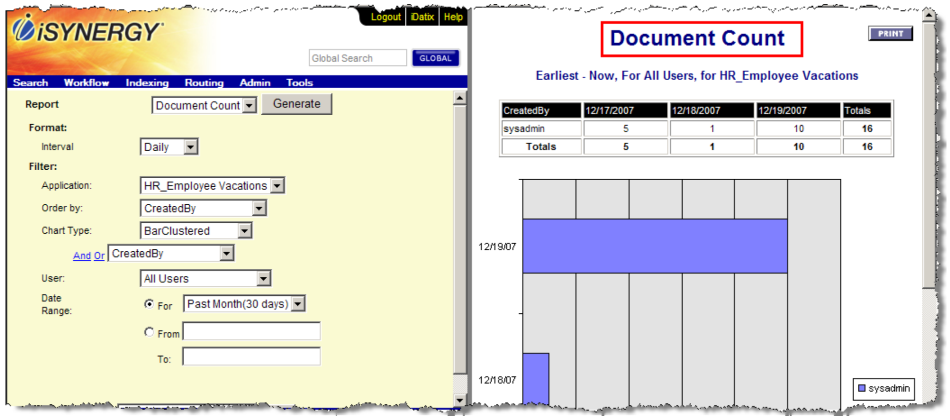
For example, you might want to change the date range.



6. Select **Generate**.



7. The Document Count Report displays.



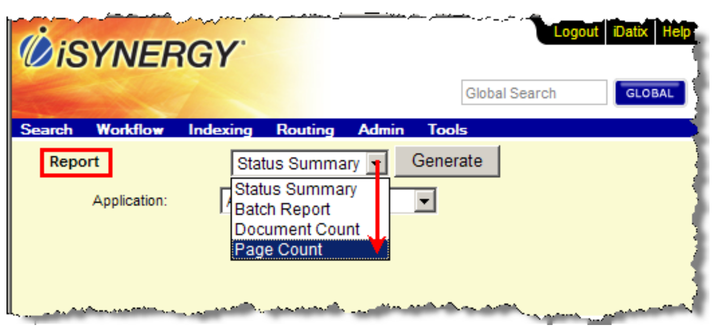
Page Count

The Page Count Report documents the number of TIFF image pages introduced into (created by metric) iSynergy.

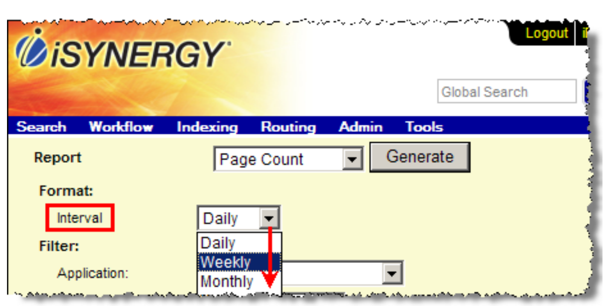
To create a Page Count Report, follow these steps:

1. On the iSynergy Menu bar, select **Admin**>**Reporting**.

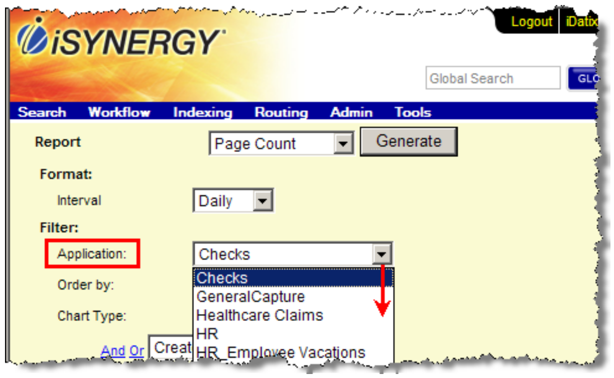
2. Select the **Page Count** option for the Report field.



3. Select the appropriate **Time Frame.**

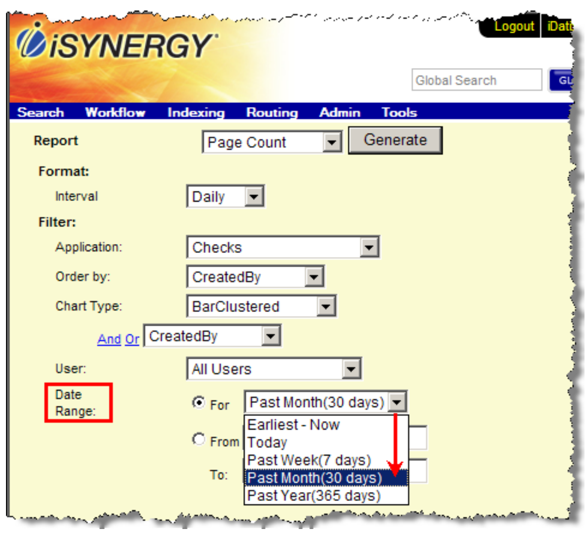


4. Select the appropriate **Application**.

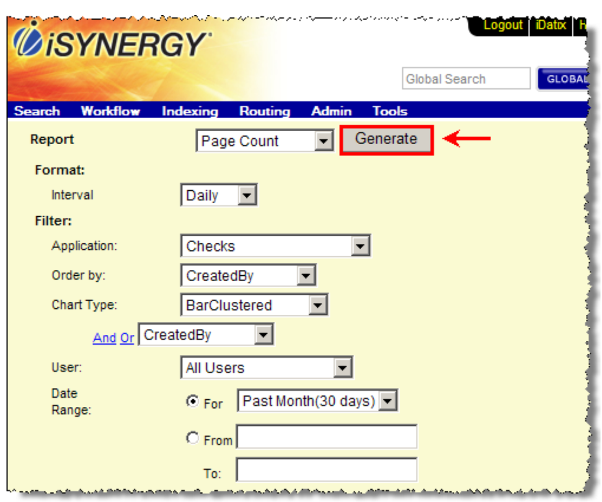


5. If you any additional reporting criteria, select the appropriate drop down menu.

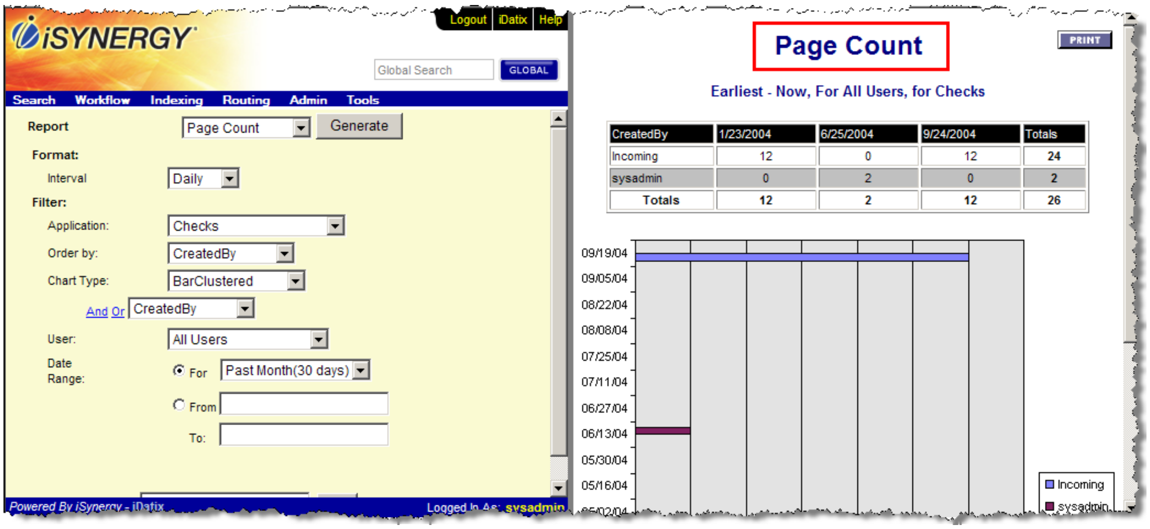
   For example, you might want to change the date range.



6. Click **Generate**.



7. The Page Count Report displays.

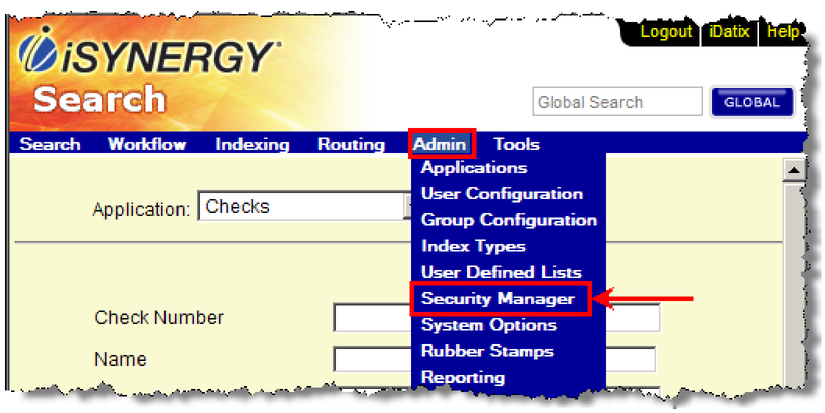


System Maintenance

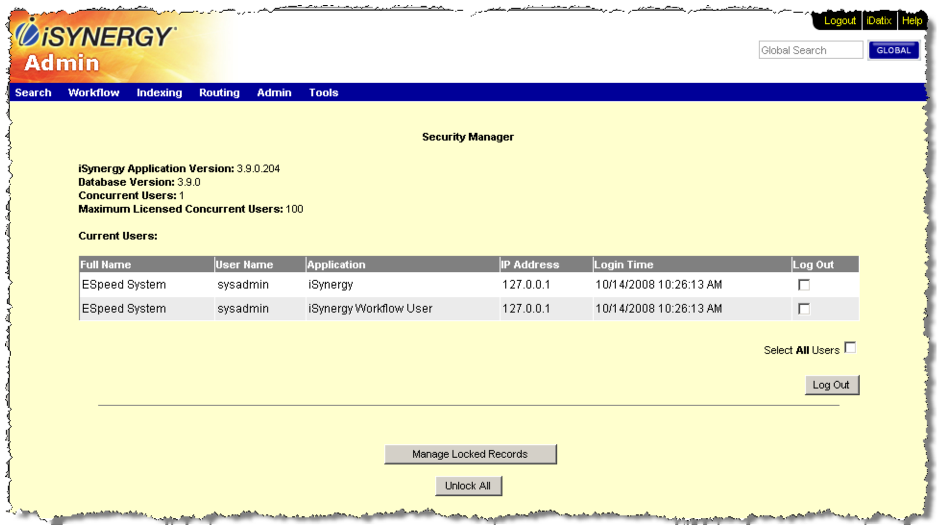
The section entails general iSynergy “housekeeping” functions performed in the Security Manager and System Configuration pages.

Security Manager

1. On the iSynergy Menu bar, navigate to and select **Admin>Security Manager**.



Note: The Security Manager dialog displays.

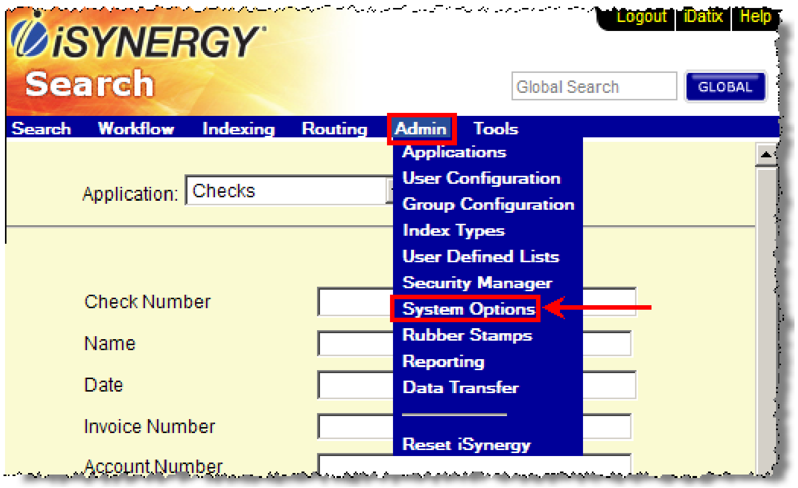


Element	Description
iSynergy Application Version	Displays the installed version number of your iSynergy application.
iSynergy Database Version	Displays the installed version number of the iSynergy database that is configured to your application.
Concurrent Users	Displays the number of users currently logged into iSynergy.
Maximum Licensed Concurrent Users	Displays the number of the most allowable users concurrently logged into iSynergy.

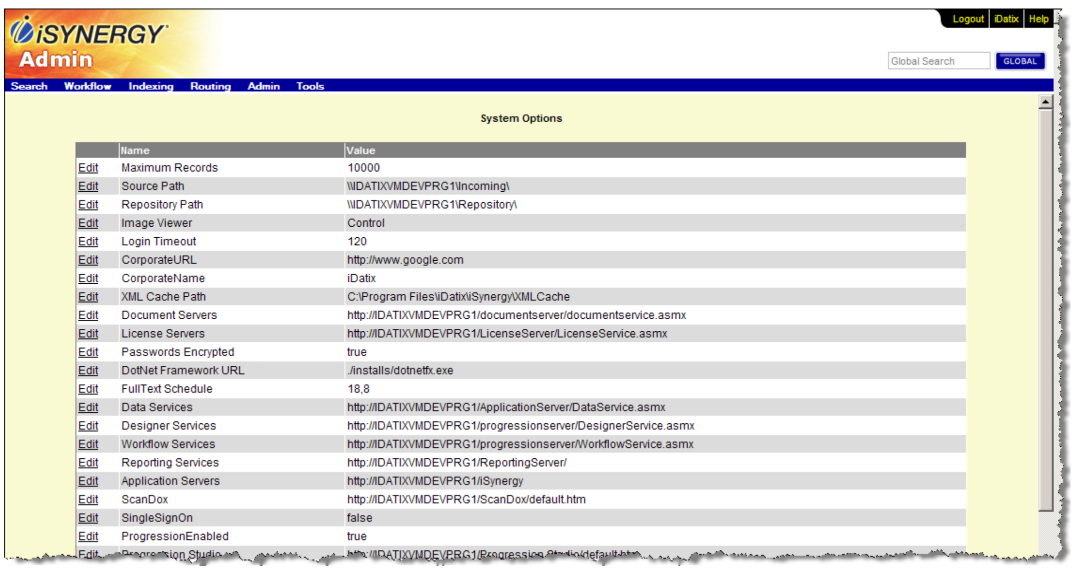
System Options

The System Options dialog displays the parameters by which the iSynergy application is set up in relation to your database(s), repositories, servers and other iDatix applications.

1. On the iSynergy Menu bar, navigate to and select **Admin**>**System Options**.



Note: The System Options dialog displays.



Element	Description
Maximum Records	Indicates the maximum number of records that are returned as a result of a search. If a search would result in 1,000 returned records, but the maximum records had been set to 30, only 30 records would ever be returned in the search.
Source Path	Indicates the folder from which incoming files are processed
Repository Path	Displays the path where the iSynergy repository resides
Image Viewer	Indicates the state in which the Image Viewer displays by default.

Element	Description
Login Timeout	Contains the number of minutes after which the system automatically logs out a user after this period of inactivity
Corporate URL	Contains the Internet address of the desired corporation. This address will be displayed as an active hyperlink in the upper right portion of the iSynergy browser.
Corporate Name	Displays the name of the corporation.
XML Cache Path	Displays the location where the XML is stored.
Document Servers	Displays the location where the Document server is installed.
License Severs	Displays the directory location in which the license servers are installed.
Passwords Encrypted	Reflects the value selected regarding the encryption of passwords. A value of “True” means passwords are encrypted; a value of False indicates the passwords are not encrypted.
DotNet Framework URL	Contains the directory in which the DotNet Framework resides.
Full Text Schedule	Indicates the hours in which the FullText Service operates. The first number shown indicates the start time; the second number shown indicates the end time.
Data Services	Contains the directory in which the data services are installed.
Designer Services	Contains the directory in which any applicable designer services are installed.
Workflow Services	Contains the name of any selected workflow automation applications.
Reporting Services	Contains the name of designated reporting application
Application Servers	Contains the directory in which the iSynergy application is located.
ScanDox	Displays the directory path in which the ScanDox application is stored

Element	Description
Single Sign On	Represents the value indicating the status of single sign on. A value of true indicates Single Sign On is activated; a value of False indicates Single Sign On is inactive.
Progression Enabled	Displays the Client ClickOnce deployment location within iSynergy.
Progression Studio	Displays the directory path in which the Progression application is stored.
Progression Notifier	Displays the directory path in which the Progression application is stored.
Smtp Server	Displays the email server for iSynergy.

Appendix 1 – Creating an Application Checklist

Application

Application Name (Virtual File Cabinet) ____________________________________

Application Description:

Indexes

Indexes to be used as Search Criteria

(e.g. – SSN#, Name, Doc Type, Date, Status, etc…)

List the Index Display Order. What will be the most common Search parameter?

Order	Index Description	iSynergy Index Name	Index Type	UDL	Req	Sticky	ME	DB

Keep as Short as Possible for Data Entry

- Req = When manually indexing, index value must be supplied
- Sticky = When manually indexing, value remains after item is submitted
- ME = Multi-Edit; can change this value on several items at once (used for workflow)
- DB = Index will be pulled from an external Database

Is there an External Database to enhance the Data Entry Operation?

List Databases and their ODBC Names, Tables and Fields:

User Defined Lists

List the “User Defined Lists” (UDL’s) to be used as Index Values (Doc Types, Statuses etc…)

(Is there an external DB of these values that can be linked to?)

Attach a listing of all User Defined Lists

UDL Types

Name:	Name:	Name:	Name:

Application Linking

List Other Applications that may have relevant information that will need to be crossed referenced to items stored in this Application. (For example the relationship between PO's, Invoices and Checks)

Other Related Applications

1) ______________________________
2) ______________________________
3) ______________________________
4) ______________________________

List the common index fields between related Applications.

Other Related Indexes

1) ______________________________
2) ______________________________
3) ______________________________
4) ______________________________

What will be the formal names of the indexes?

Formal Index Names

1) ______________________________
2) ______________________________
3) ______________________________
4) ______________________________

WorkFlow

List Fields to be used to drive Ad-Hoc Workflow (Status, Assigned User, Process ID) and management reports for production metrics.

1) ______________________________
2) ______________________________
3) ______________________________
4) ______________________________

Draw Flow diagram of Workflow Process:

Security, Access and Permissions

Users First Name: ____________________________________

Users Last Name: ____________________________________

User ID: _____________________________________

User Password: _____________________________________

Permissions:

General Permissions		
☐ Annotation Add	☐ Annotation Edit	☐ Annotation View
☐ Application Add	☐ Application Delete	☐ Application Update
☐ Assignment	☐ Document Hard Delete	☐ Document Soft Delete
☐ Email	☐ Export	☐ Hide Redaction
☐ Import	☐ InBox	☐ Index Add
☐ Index Delete	☐ Index Type Add	☐ Index Type Delete
☐ Index Type Update	☐ Index Update	☐ Indexing Edit
☐ Indexing MultiEdit	☐ Note Add	☐ Note View
☐ Pre Sort Application	☐ Pre Sort Person	☐ Print Image
☐ Query Delete	☐ Query Save	☐ Remove Session
☐ Route Application	☐ Route Person	☐ Scan Image
☐ System Events	☐ System Options Update	☐ System Reporting
☐ User Add	☐ User Delete	☐ User Group Add
☐ User Group Delete	☐ User Group Update	☐ User List Add
☐ User List Delete	☐ User List Update	☐ User Update

☐ Select All Permissions

Application Access (What File Cabinets can be accessed?)

1) _________________________
2) _________________________
3) _________________________
4) _________________________
5) _________________________

Document Level Security (What UDL in a Cabinet can be Accesses?)

1) _________________________
2) _________________________
3) _________________________
4) _________________________
5) _________________________

Appendix 2 – iSynergy Status

Hard Coded Object Status Codes

- **E**: Searchable Documents (Appear in the result set for a search in the system.)
- **P**: Manual Indexing (Appear in the Manual Indexing screen for user intervention.)
- **I**: Routed to Inbox (Documents routed to an individuals or groups inbox.)
- **X**: Deleted (Documents that have been soft deleted.)
- **C**: Corrupt (Documents that have been determined to be corrupt or of incorrect resolution.)
- **Y**: Source Copy (Large multi-page TIFF files that have been separated into smaller sections are retained.)

Appendix 3 – iSynergy Service

iSynergy Service is a Windows service installed on the iSynergy web server and is responsible for:

- Monitoring the incoming folders for all iSynergy applications. When the folders are dropped in, iSynergy Service enters a record in the appropriate database for that file.
- Moving the file to the proper repository and renaming the file with the correct file name.
- Monitoring printing activity in the iSynergy system and writing a record to the event log each time a tiff image is printed from the system.
- Being used in the export function to write the image files and data for the selected export.
- Being used in the import function to read the import files, and insert the records into the database and the images into the repository.
- Being used to maintain the directory structure in the repository with regard to the application subfolders.

Troubleshooting iSynergy Service

- ERROR: iSynergy server not responding to print requests.

Typically, this problem is encountered when a User attempts to print a Document with the iSynergy service is not running.

To troubleshoot this error message, follow these steps:

1. Navigate to the **Windows Start Menu**.
2. Right-click **My Computer.**
3. Select **Manage**.

   Note: The Computer Management dialog displays.

4. Expand **Services and Applications.**
5. Select **Services**.
6. In the right pane, right-click **iSynergy Services**
7. Select **Start**.
8. Log back into iSynergy and verify that Documents will now print.

Error Codes

Code	Error	Description
-1	INVALID_PRIMARY_KEY	Error during database I/O that returns a primary key.
-7	EXCEPTION_ENCOUNTERED	Negative return codes
-666	UNINITIALIZED_INTEGER	Negative return codes
0	SUCCESS	Always zero
1000 - 2000 block – O/S Errors		
1001	FILE_NOT_FOUND	O/S Errors
1002	FILE_INSUFFICIENT_PERMISSIONS	O/S Errors
1003	FILE_LOCKED	O/S Errors
1004	IO_ERROR	O/S Errors; An external process that started, failed.
1005	EXTERNAL_PROCESS_FAILED	O/S Errors
1006	UNABLE_TO_OPEN_FILE	O/S Errors
1007	INVALID_CMD_LINE_ARG	O/S Errors
2000 – 3000 block – Database Errors		
2001	DB_UNABLE_TO_CONNECT	Database Error
2002	DB_SQL_ERROR	The database query returned an SQL error.
2003	DB_REQUIRED_FIELD_MISSING	A required field is missing a value.
2004	DB_CONNECTION_CLOSED	The underlying connection to the database is closed.

2005	DB_INSUFFICIENT_PERMISSIONS	The account accessing the database lacks permission to perform the current operation.
2006	DB_CONFIGURATION_ERROR	The database configuration file is incorrect.

Code	Error	Description
3100 – 3200 block – Security errors, authentication and authorization		
3100	INVALID_CREDENTIALS	The user could not be authenticated with the given credentials.
3101	INSUFFICIENT_PERMISSIONS	The user does not have access to a document or process.
3102	ACCOUNT_DISABLED	The user's account has been disabled or set inactive.
3103	ACCOUNT_CLOSED	The user's account has been closed permanently.
3104	PASSWORD_EXPIRED	The user's account has an expired password.
3105	MISSING_CREDENTIALS	A SOAP request was received without user credentials such as a UsernameToken.
3106	USER_ID_DOES_NOT_MEET_REQUIREMENTS	The password does not match the regular expression defined for validation.
3107	PASSWORD_ID_DOES_NOT_MEET_REQUIREMENTS	The password does not match the regular expression defined for validation.
3300 -3400 block – DocumentServer Errors		
3301	INVALID_URI	The URL does not contain the necessary elements.

3302	APPLICATION_NOT_FOUND	The application specified by a database alias and application does not exist in the database.
3303	DOCUMENT_NOT_FOUND	The document specified by a database alias, application id and document id does not exist in the database.
3304	USER_NOT_FOUND	The given user id could not be found in the database.
3305	APPLICATION_NOT_IMPLEMENTED	Documents can only be served within implemented applications.
3306	DOCUMENT_SERVER_DOWN	The document server is not accepting requests.
3310	APPLICATION_NOT_LICENSED	The requested document belongs to an application that is unlicensed.
3311	LICENSING_NOT_INITIALIZED	The licensing manager has not been initialized.
3312	INVALID_LICENSE	The license file is corrupt.

Code	Error	Description
20000 -20099 block – Data Object Model		
20001	INVALID_DATA	Data Object Model
20002	INVALID_TYPE	Data Object Model
20003	INVALID_DATABASE_TYPE	Data Object Model
20004	EXCEPTION_EXECUTING_SQL	Data Object Model
20100 – 20199 block – Data Object Model		
20101	INACTIVE_TASK	Workflow Object Model
20102	INACTIVE_PROCESS	Workflow Object Model

20103	UNAUTHORIZED_SUBSCRIBER	Workflow Object Model
20104	NO_PRECEDING_TASK	Workflow Object Model
20200 -20399 block – Image, Document Centric Errors		
20200	INVALID_DOC_TYPE	Image, document centric errors an invalid document type was accessed given the current context.
20201	OCR_FAILURE	Unable to OCR document.

Basic SQL Statements

The below examples have been provided to help you create a basic SQL statement for use in iSynergy.

View Specific Records in Tables

- Select * from <table> where <column name> = 'string' ex. Select * from _obj_2 where IDX_SSN = '111-22-3333'
- Select * from <table> where <column name> like '%partial string%'

*For example, Select * from _obj_2 where IDX_SSN like '%111-22-3%'*

Update Specific Records in Tables

When using this SQL Statement, do not forget the specific where clause to the record you are updating or you might update the entire table in error. Ensure you have isolated a unique record with the where clause.

9. Update <table>

10. Set <column name> = 'correct data'

11. Where <column name> = 'current value' and <column name> = 'current value'

For example,(1) Update _obj_2, (2) Set IDX_SSN = '111-22-3333' (3) Where objectid = 2 and IDX_Name = 'John Doe'

View Data Events

The below select statement is looking for all status changes in the object 2 table that were "P" status prior to being changed.

Note: You can change the oldvalue parameter, objtable parameter and eventdesc as needed to create the correct search criteria.

- select * from eventlog where oldvalue = 'P' and objtable = '_obj_2' and eventdesc = 'status'

View current Group/User Level Permissions

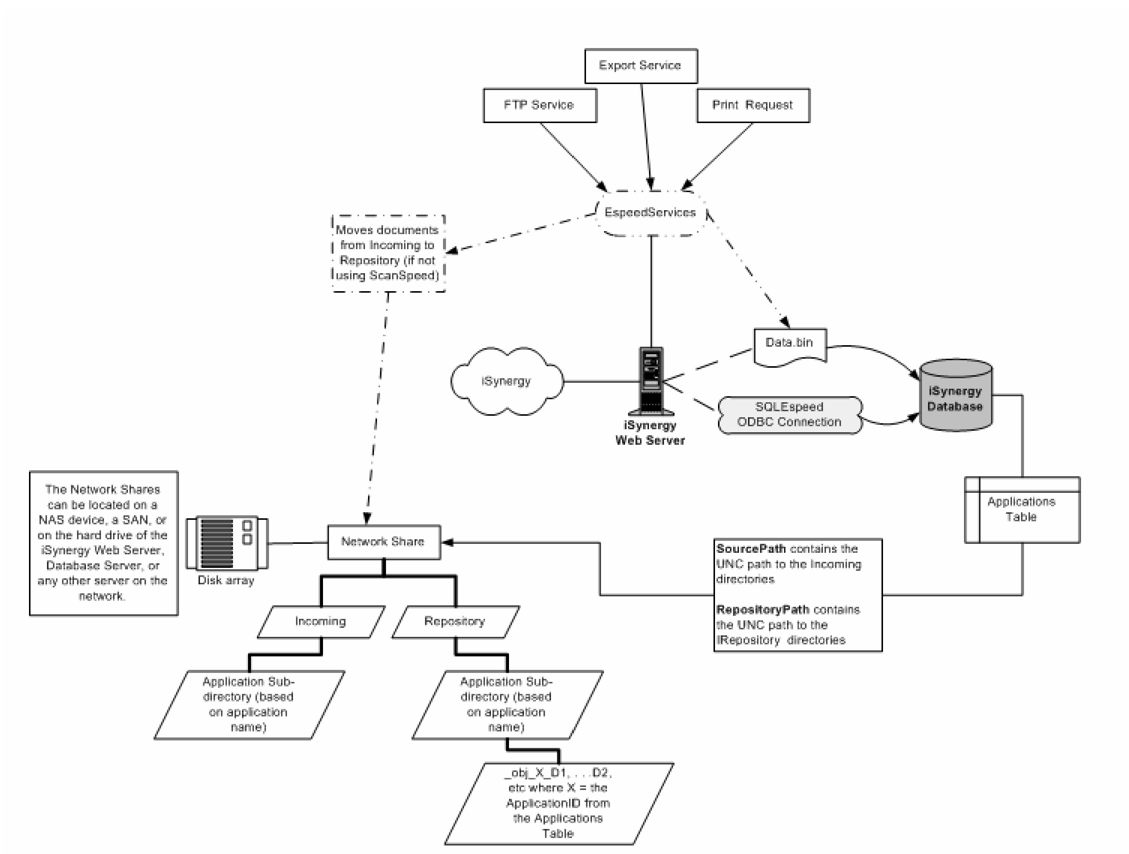
The below statement is for Users.

- select permissions.permissionname, users.username
- from users, permissions, userpermissions
- where userpermissions.permissionid = permissions.permissionid and users.userid = userpermissions.userid

The below statement is for Groups and Users.

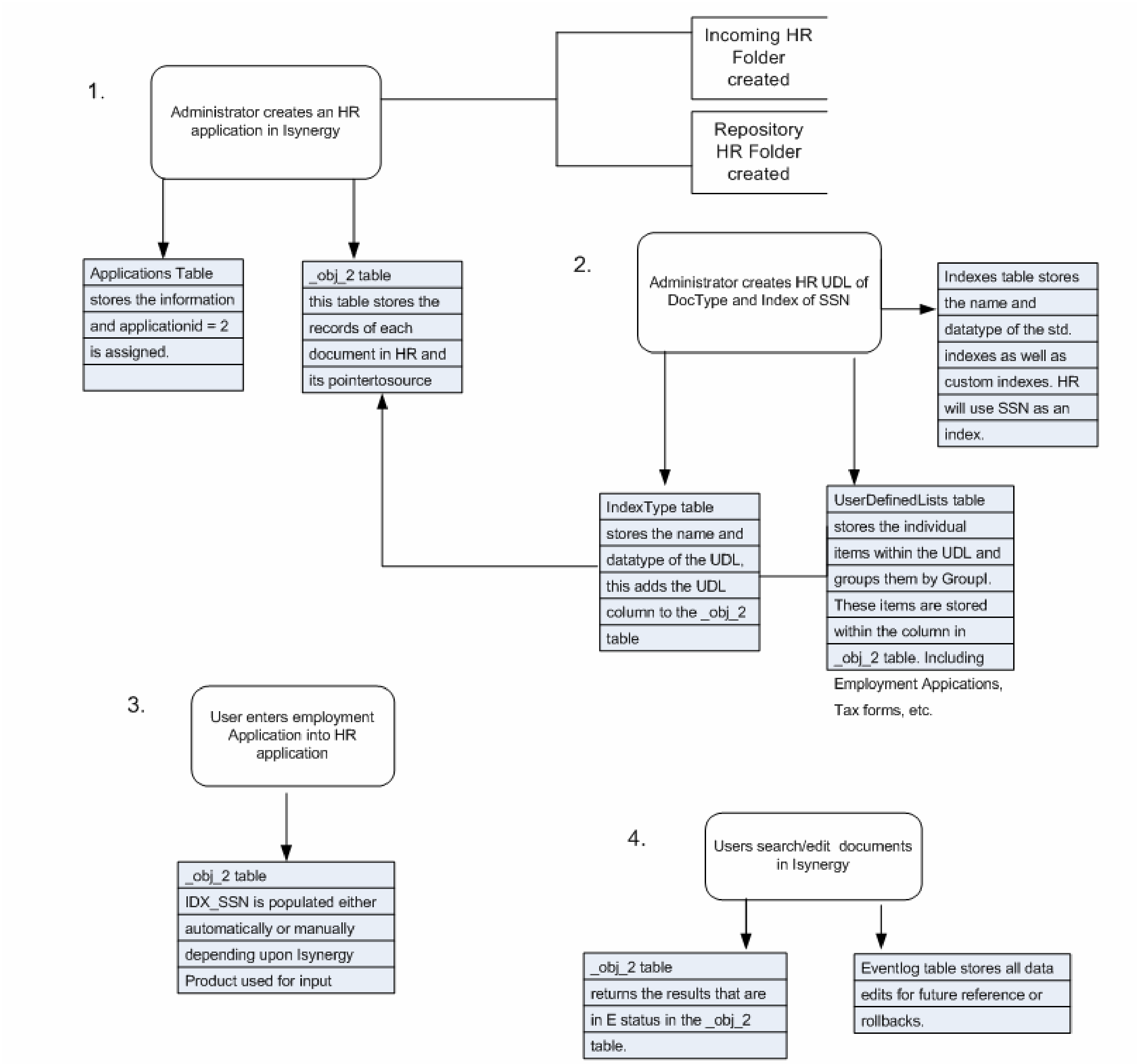
- select distinct users.username, permissions.permissionname,applications.name, usergroups.groupname
- from applications, users, permissions, userpermissions, usertogroup, grouppermissions,usergroups
- where applications.applicationid = grouppermissions.applicationid and userpermissions.permissionid = permissions.permissionid and users.userid = userpermissions.userid and usertogroup.usergroupid = usergroups.usergroupid

iSynergy Web Server, Database and Image Store



iSynergy Database Workflow

Below is a sample workflow of a created Application in iSynergy.



Appendix 5 – iSynergy eSpeed Database

Overview

Espeed is the iSynergy Database. The Applications created within iSynergy automatically output corresponding _obj_x tables with related subfolders to the iSynergy repository folder. The number of Applications created in iSynergy correlates directly with the number of _obj_ tables and subfolders.

Products used in conjunction with iSynergy include:

- ScanSpeed
- iScan
- Xtractor
- Incoming share.
- QuickIndexer
- ScanDox
- iDox

The tables in iSynergy and the information contained within each are as follows:

- _obj_1 – By default this table is reserved for the General Capture Application
- _obj_2 to _obj_x – Application related tables with x representing the last table created
- Annotations – Records annotations and the objects to which they apply.
- Application – The Applications created in iSynergy and their related _obj_ table
- Batches – Batch information for documents submitted from ScanSpeed, ScanDox, or iDox
- Config- Stores iSynergy paths and configuration details
- Datatype – Lists the Datatypes used in iSynergy
- DefaultIndexes- Standard iSynergy Indexes – these are your display fields
- DisplayFields – User specific display fields on the iSynergy viewer
- Document Status- The statuses that drive the iSynergy system
- ErrorLog – Log of iSynergy errors
- Eventlog – Historical tracking of data events within iSynergy
- EventTypes – Numeric listing of the types of events tracked in EventLog
- Exports – Historic record of exports
- FTPConfig – Contains FTP paths and configuration details
- FTPDownloads – Incoming ftp files
- FTSData – Full Text data and its related Application
- FTSHistory – History of when docs were full text and any errors attached
- FTSQueue – List of docs waiting for full text processing
- GroupPermissions – Displays permissions assigned to groups
- Imports – Files imported into iSynergy and their historic path
- Inboxes – Emails that will be used with ‘route to’

- Indexes – iSynergy standard Indexes and user defined Indexes
- IndexMapping – Details of how the Indexes relate to the Applications
- IndexTypes – All Indexes with datatype, field length, formatting, etc.
- LicenseKeyHistory – History of licensing info including current info
- LicenseKeys – List of licenses assigned
- LicenseTypes – Description of each license type use
- Notes – History of notes created in iSynergy and the objected they relate to
- PageRotations – Stores information about the rotation of pages for documents in iSynergy
- Permissions – List of available permissions to assign within iSynergy
- ProductSettings – Installed iSynergy products
- Queries – Saved user specific queries
- Reports –
- Results -
- RoutingEvents - History of routed docs
- RubberStamps – List of available rubber stamps in iSynergy and their attributes
- Sessions – Current sessions open in iSynergy
- Translations – Translations of values as referenced by the Translation Type table
- TranslationTypes – List of translation types available in Xtractor and iDox
- UserDefinedLists – List of UDLs with associated create and modified history
- UserGroups – List of UserGroups in iSynergy
- UserPermissions – User based permissions
- UserPreferences – Specific user settings in iSynergy
- Users – List of iSynergy users and their passwords
- UserToGroup -
- ViewLevels
- Views
- XtractorEvents – Xtractor event log

OBJ_X Tables and Column Roles

iSynergy assigns an objectid programmatically, not as an identity seed in SQL. As opposed to storing documents directly in the Espeed database, iSynergy stores documents in the iSynergy repository folder while creating a pointer (path to the actual document.) to the object in the column named ‘pointertosource’ in the _obj_x tables of the espeed database.

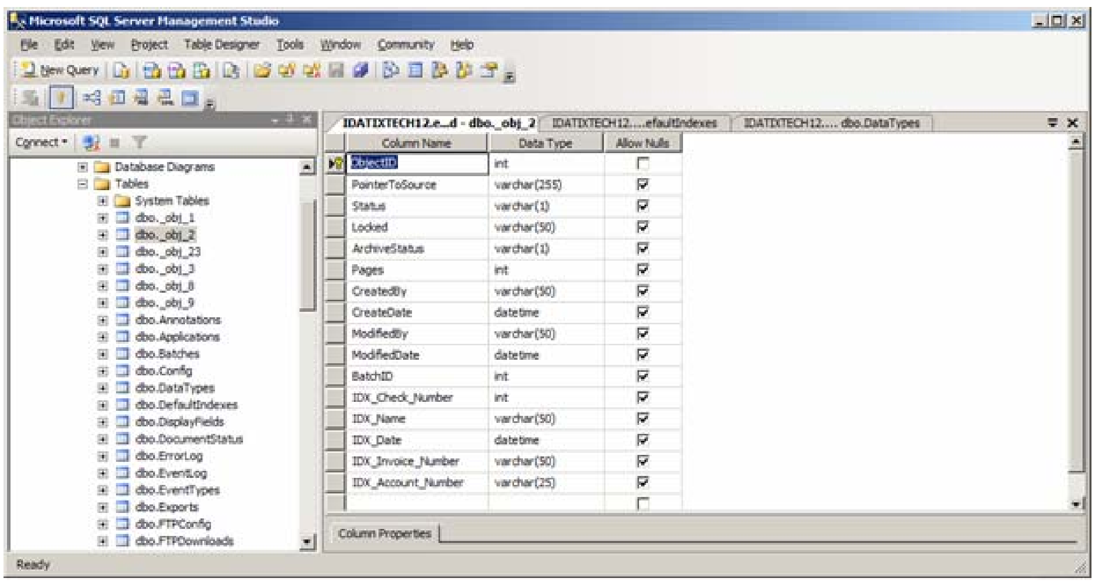
> *For example, C:\iSynergy\repository\Checks_obj_2_D1_obj_2_D1_013R1.TIF The d1_013R1.tif represents subfolder D1 and object 013 revision 1.*

The status of the document is stored in the _obj_x tables as well. Document status reflects the current status of a document. Document status is helpful when attempting to determine if a document is searchable (status “E”). The _obj_x tables also store:

- The creator of each document with create date
- The last modification date and who modified the doc
- How many pages in the doc and if it was batched
- The associated batch number where applicable

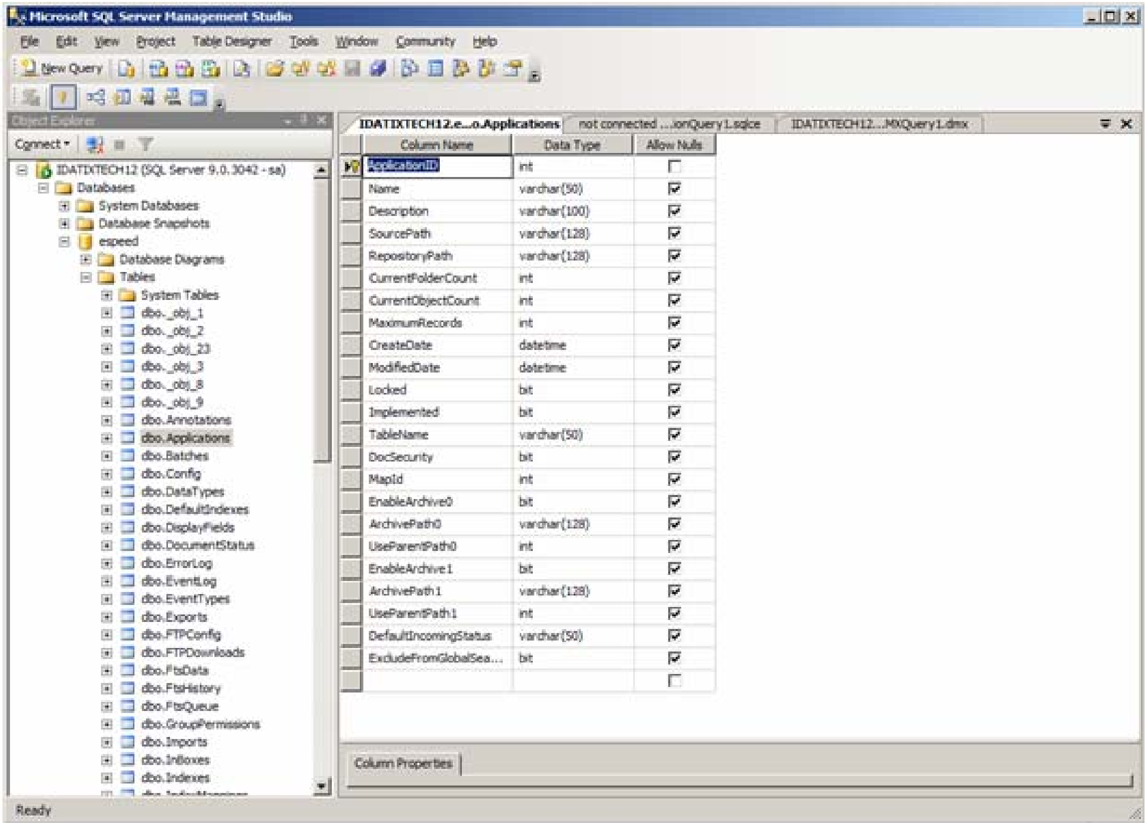
Any Indexes created for a specific Application will be stored in these tables. Additionally, the Application table holds the information pertaining to the _obj_x tables.

> *For example, an Application called 'Human Resources' may have an ApplicationID of '3' in the Applications table. This notifies you that the _obj_3 table holds the pointers to the documents for Human Resources. Typically, the order in which Applications were created corresponds to the obj_number of the table. _obj_1 is reserved for the 'General Capture' Application and folder.*



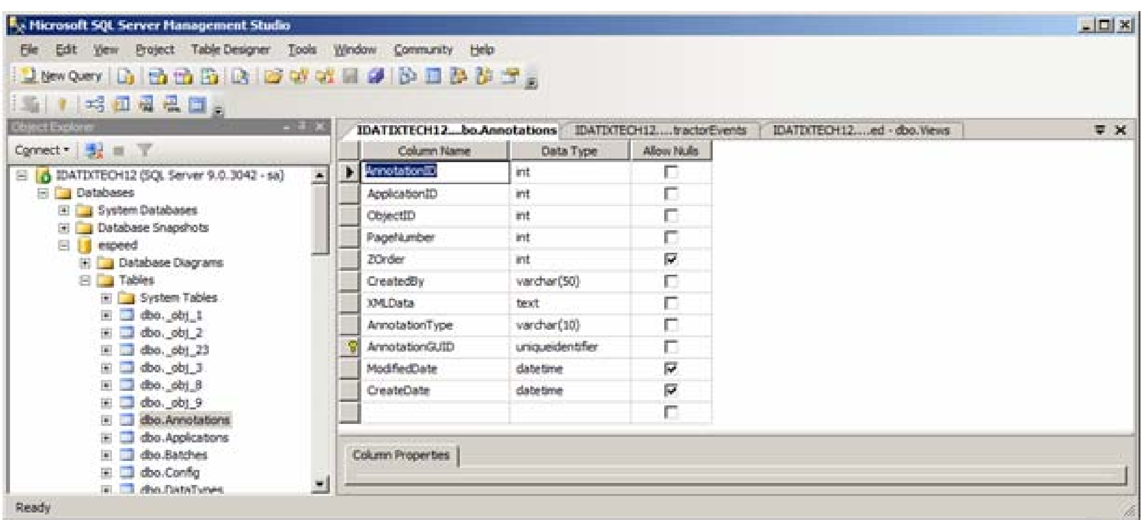
Application Table

The Application table relates to the _obj_x tables, as well as the pointertosource of the document scanned into iSynergy and the repository and incoming folders. The repository folder holds the Application folders. Within each Application folder, there can be numerous subfolders. Each subfolder will hold a maximum number of pre-determined documents. When the folder limit is reached, a new subfolder is created and assigned a numeric value that is one greater than the previous folder. The Application table stores the number of subfolders within the Application folder as well as the maximum number of documents each subfolder can hold. Folders are stored in the column 'currentfoldercount'. The number of documents within that folder are stored in 'currentobjectcount'. The subfolder number can be increased manually as needed if an error should arise.



Annotation Table

This table stores all annotations added to documents along with the objectID of the document, the identity of the user who added the annotation, and the date and time it was added.



Batches Table

When documents are scanned in batches, the batch information is stored in this table. This information includes date, the first file name of batch and the last file name of batch.

Config Table

The Config table stores the same information located in the **admin menu > system options**, including all paths and configuration information, as well as the iSynergy version number.

DocumentStatus Table

This table contains the standard iSynergy statuses as well as custom statuses used to create the iSynergy workflow.

ErrorLog Table

MS SQL errors are tracked in this table.

EventLog Table

Eventlog keeps track of all data changing events within iSynergy. The unique identifier in this table is the combination of objtable, objectid and eventdesc columns. When a user makes a change to a document, the change and all related changes are automatically tracked in eventlog. If a user changes or enters data, the old value is stored as well as the new data in the same record.

> *For example, when a user sends a document to Xtractor, the event log tracks in a single record the status change to 'A'. The table then creates other records in the event log as the document proceeds to the status 'E'. Each record stores the user or the product that initiated the change of document status. Many times, user errors can be corrected by querying for the correct data from the eventlog table. Event date and time are stored with each record in the table.*

EventType Table

In the EventLog table every record will have an EventType. The EventType table describes events, such as user login, Index change, etc.

Full Text

Primarily uses ftsqueue, ftshistory, ftsdata, and the _obj_x tables.

> *Note: Prior to using iSynergy Full Text Service, you must make sure that full text capability is enabled on the SQL server. This enables the full text catalogs to be created and stored in SQL.*

Once full text has been set up to run on an Application, the documents in the related obj_x table are moved to the ftsqueue table in preparation for the service to run and process the documents. Once the FTS service runs, the records that store the processing data are moved to the ftshistory table. This table also stores the information if an error has occurred on a specific document. This provides the DBA with information to research why any document may fail.

> *For example, if a document is queued up to run through FTS service, but prior to the service running a user deletes the document, FTS will produce an error. The service may "hang" for a long period because in layman's terms, it is looking for 'E' status documents to process and it is looking for the deleted document with an 'E' status, when in fact, the deleted document now is in 'X' status. It is usually best to double check the ftsqueue*

table when users are soft deleting documents from an Application that runs through full text.

The actual FTS binary information is stored in the ftsdata table. This table stores the information for the corresponding SQL catalog. Regardless of which iSynergy Suite product was involved, all changes to data are recorded in the Espeed eventlog table. Along with this table, there is a ProcessAging view that captures the data from eventlog by object and calculates the number of days the object was in a particular state for each eventdesc.

For example, if a document has a status of ‘P’ for a period of time and the status then changes to ‘E’ , the process aging view will store the number of days the document was in ‘P’ status prior to changing to ‘E’ status.

FTSData

This is the Full Text Service data table. This table stores the binary data for each document that has been processed by the Full Text Service. FTSData stores an Ftsid, objectid and Applicationid. This table also stores the raw data and date and time full text service ran.

FTS History Table

If an error occurs during the FTS Service, it is stored in this table. The history of documents that have been processed by the Full Text Service is also contained in this table.

FTSQueu Table

Documents waiting for Full Text Service are stored in this table.

GroupPermissions

When a group is created, the groupid and name is stored in the usergroups table. When you associate permissions to that group, this information is stored in the grouppermissions table and each permission is pulled from the permissions table by a permissionsID. There is also a view in Espeed called GroupPermissionsbyUser view to see an overview of permissions at the group level.

ImportMapper

This product imports a CSV file from another system. The CSV file contains a path to the images as well as the Indexing on the images. When ImportMapper is opened and a CSV import file is assigned, the mapping fields need to be filled to allow the service to automatically populate the fields. Once you save and close ImportMapper, the data is entered into the Espeed database according to the mapped fields. The ImportMapper service needs to be run each time an import of images from another system needs to be performed.

IndexesTables

This table stores the Indexes, the Application(s) in which they are used, Indexname and type, and any validation that exists. The Indexes table reveals if the Index is a required field, its default value (if any), whether it can be edited, and if sorting and grouping are associated with the Index. If you want iSynergy to track changes for a specific Index, set the column ‘logchanges’ to true (this is the default setting).

IndexMapping Table

When an Application is linked to the ‘IndexMapping’ table then the drop-down control is active in QuickIndexer and iScan. The only other table that ‘IndexMapping’ interacts with is the Applications table (MapID).

IndexType Table

When a UDL is created, its entry is stored the Indextypes table. The data type for a UDL is ‘select’, indicating there is list from which to select this value. The actual values within the list are stored in the UserDefinedLists table. The values are grouped together by an internally used groupid, that groups these items for display in the UDL drop-down list within iSynergy.

Permissions

This table stores all permissions assigned on the user and group configuration pages in iSynergy. Each permission is assigned a corresponding ID number that relates to the group permissions table and the user permissions table.

ProductSettings

This table stores the Installed iSynergy products with a corresponding ID number.

Queries

This table stores queries created by the user in the Search Page of iSynergy. The table assigns and stores a query ID to created queries and also stores the user name of the user defining the query. The actual search criteria of the query is stored in the column ‘querystring’. The column ‘application’ holds information for the Application within which the query was created.

Reports

Standard reports for iSynergy are stored in this table.

RoutingEvents

This table stores the routing history of documents within iSynergy. This history information includes the original Application and objectID as well as the Application receiving the document and the new objectID in that Application. Date routed is also stored in the ‘RoutingEvents’ table.

RubberStamps

Standard and custom rubber stamps are stored in this table. All stamps formatting settings are stored in the ‘RubberStamps’ Table as well.

Translations

This table stores the translations used for Xtractor. TranslationID stores each translation uniquely in the table, the translationTypeID relates it to the translationTypes table. Original value would be the literal original word or words, and the translated value would essentially be the abbreviated value to be used in iSynergy.

For example, creating a bar code with a string of words that is too long for the barcoder, can be handled by creating an abbreviated value for the string. For instance, ApplicationToRouteDocumentsToHumanResources = ATRDTHR. Xtractor would read ATRDTHR and translate this to the literal string in the table.

UserDefinedLists

The groupID is used to identify documents in the same UDL.. Each UDL is given a listID but can have many documents that are related in there, thus identified by a groupID. ListItem defines the name of the item within the group

UserGroups

When permissions are set up on a group level, the users are sorted into groups, and the related group identifier is stored here.

UserPermissions

This table stores all permissions for all users when User Level permissions are used. Each permission for each user is stored as an individual record. PermissionID relates to the permissions table.

Users

This table stores all user information including userID and Password information. Also stored here is info relating to user as an http viewer. When a user is added to iSynergy, relevant information is stored in the user table. When permissions are applied to that user, the userID from the user table is entered into the userpermissions table with each associated permission. If the user is then added to a group, an entry is made into the usertogroup table, and is associated by userID through this table to the group permissions table that stores permissions by groupid.

UserToGroup

This table stores the information as to which users are assigned to which groups.

iSynergy Conceptual Schema