

iSynergy Small Business Imaging and Workflow Solution

Advanced User Manual

Version 3.9.3

Copyright © 2000 – 2010, iDatix Corporation. All rights reserved.

All rights reserved. No part of the contents of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language in any form without written consent from iDatix Corporation.

This software product, including the manual and media, is copyrighted and contains proprietary information that is subject to change without notice. The software may be used or copied only in accordance with the terms of the license agreement.

iDatix and iSynergy are registered trademarks of iDatix Corporation. All other trademarks are acknowledged as the exclusive property of their respective owners.

Version 3.9.3 -- 5/25/2010

Table of Contents

Table of Contents	2
Welcome to iSynergy 3.9!	5
What's new in 3.9	5
Client Support Services Contact Information	7
What is Content and Content Management	8
Foundational Terminology	9
iSynergy Basic Structure 1	1
Content and Information Flow1	3
iSynergy Installation Requirements 1	4
Supported Server Platforms 1	4
Hardware1	4
SQL Server Configuration 1	4
Web Server Configuration 1	15
Customize iSynergy Option 1	9
iSynergy Login	21
Understanding iSynergy 2	22
Application Pane 2	23
Document Viewer Pane2	29
Application Management 4	12
Index Fields4	13
User-Assigned Index Fields 4	13
System Assigned Index Fields 4	14
Display Fields	19
Index Types5	52
User Defined Lists (UDL) 5	56
Create a UDL5	58
Creating an Application6	32
Enabling Revision Control6	6
Enabling Revision Tracking and Audit Trail6	37
Enabled Document Level Security6	39
User Account Document Level Security7	70
Force Comments on Check in 7	71
Enable Auto Check in for Annotations7	72
Add Indexes to an Application7	74
Group and User Permissions	' 9

User Account Management	
Creating a New Group	
Modify Group Permissions	
Creating a New User Account	
Delete a User Account	
Permission Management	
System Level Permissions	
Application Permissions	
Cabinet Management Permissions	
Account Functionality Management Permissions	
User Permissions	
Routing Documents	104
The General Capture Application	105
Pre-Sort General Capture	106
Queue Indicator	106
Application Selector	107
Assign to User/Group	107
The InBox Page	108
Routing Documents	109
Pre-Sort General Capture to an Application	109
Pre-Sort General Capture to an Inbox	110
Route from an Inbox to an Application	111
Route from Inbox to Inbox	112
Route from Application to Application	113
Indexing Documents	114
The Indexing Page	114
Multi-Edit Function	119
Annotations	
Annotation Properties	123
Creating and Modifying Rubber Stamps	123
Data Transfer	128
Searching for Documents	132
Unspecific Search	136
Specific Search	138
Complex Specific Search	140
Global Search	

Cross Query Search143Wildcard Searches144Full Text Search145Query Manager147Workflow150Workflow Design150The Results Page151iSynergy Reporting Functionality153Status Summary155Batch Report157Page Count157Page Count157System Maintenance161System Options162Appendix 1 – Creating an Application Checklist166Appendix 2 – iSynergy Status170Hard Coded Object Status Codes170Hard Coded Object Status Codes175View Specific Records in Tables175View Specific Records in Tables175View Current Group/User Level Permissions176isynergy Web Server, Database and Image Store176Operview178Overview178Overview178Overview178Overview178Overview178Overview178Overview178Overview178Overview178Overview178Overview178Overview178Overview178Overview178Overview178Overview178Overview178Overview178Overview178	Cross Query Search	1 1 2
Full Text Search145Query Manager147Workflow150Workflow Design150The Results Page151ISynergy Reporting Functionality153Status Summary155Batch Report155Document Count157Page Count159System Maintenance161Security Manager161System Options162Appendix 1 - Creating an Application Checklist166Appendix 3 - iSynergy Service170Hard Coded Object Status Codes170Appendix 3 - iSynergy Service175View Specific Records in Tables175View Data Events175View Current Group/User Level Permissions176Appendix 5 - iSynergy eSpeed Database178Overview178	-	
Query Manager147Workflow150Workflow Design150The Results Page151iSynergy Reporting Functionality153Status Summary155Batch Report157Page Count157Page Count157System Maintenance161System Options162Appendix 2 - iSynergy Status170Hard Coded Object Status Codes170Appendix 3 - iSynergy Service171Basic SQL Statements175View Specific Records in Tables175View current Group/User Level Permissions176Appendix 5 - iSynergy eSpeed Database178Overview178		
Workflow150Workflow Design150The Results Page151ISynergy Reporting Functionality153Status Summary155Batch Report155Document Count157Page Count159System Maintenance161Security Manager161System Options162Appendix 1 - Creating an Application Checklist166Appendix 2 - iSynergy Status170Hard Coded Object Status Codes170Appendix 3 - iSynergy Service171Basic SQL Statements175View Specific Records in Tables175View Data Events175View current Group/User Level Permissions176Appendix 5 - iSynergy eSpeed Database178Overview178		
Workflow Design150The Results Page151iSynergy Reporting Functionality153Status Summary155Batch Report155Document Count157Page Count159System Maintenance161Security Manager161System Options162Appendix 1 – Creating an Application Checklist166Appendix 2 – iSynergy Status170Hard Coded Object Status Codes170Appendix 3 – iSynergy Service171Basic SQL Statements175View Specific Records in Tables175View Data Events175View Current Group/User Level Permissions176Appendix 5 – iSynergy eSpeed Database178Overview178	Query Manager	147
The Results Page151iSynergy Reporting Functionality153Status Summary155Batch Report155Document Count157Page Count159System Maintenance161Security Manager161System Options162Appendix 1 – Creating an Application Checklist166Appendix 2 – iSynergy Status170Hard Coded Object Status Codes170Appendix 3 – iSynergy Service171Basic SQL Statements175View Specific Records in Tables175View Data Events175View Current Group/User Level Permissions176Appendix 5 – iSynergy eSpeed Database178Overview178	Workflow	150
iSynergy Reporting Functionality153Status Summary155Batch Report155Document Count157Page Count159System Maintenance161Security Manager161System Options162Appendix 1 - Creating an Application Checklist166Appendix 2 - iSynergy Status170Hard Coded Object Status Codes170Appendix 3 - iSynergy Service171Basic SQL Statements175View Specific Records in Tables175View Data Events175View current Group/User Level Permissions176Appendix 5 - iSynergy Speed Database178Overview178	Workflow Design	150
Status Summary155Batch Report155Document Count157Page Count159System Maintenance161Security Manager161System Options162Appendix 1 – Creating an Application Checklist166Appendix 2 – iSynergy Status170Hard Coded Object Status Codes170Appendix 3 – iSynergy Service171Basic SQL Statements175View Specific Records in Tables175View Data Events175View current Group/User Level Permissions176iSynergy Web Server, Database and Image Store178Overview178	The Results Page	151
Batch Report.155Document Count157Page Count.159System Maintenance161Security Manager161System Options162Appendix 1 – Creating an Application Checklist.166Appendix 2 – iSynergy Status170Hard Coded Object Status Codes170Appendix 3 – iSynergy Service171Basic SQL Statements175View Specific Records in Tables175View Data Events175View current Group/User Level Permissions176iSynergy Web Server, Database and Image Store178Overview178	iSynergy Reporting Functionality	153
Document Count157Page Count.159System Maintenance161Security Manager.161System Options.162Appendix 1 – Creating an Application Checklist.166Appendix 2 – iSynergy Status170Hard Coded Object Status Codes.170Appendix 3 – iSynergy Service.171Basic SQL Statements.175View Specific Records in Tables175View Data Events175View current Group/User Level Permissions176iSynergy Web Server, Database and Image Store.178Overview178	Status Summary	155
Page Count	Batch Report	155
System Maintenance161Security Manager161System Options162Appendix 1 – Creating an Application Checklist166Appendix 2 – iSynergy Status170Hard Coded Object Status Codes170Appendix 3 – iSynergy Service171Basic SQL Statements175View Specific Records in Tables175Update Specific Records in Tables175View current Group/User Level Permissions176iSynergy Web Server, Database and Image Store178Overview178	Document Count	157
Security Manager161System Options162Appendix 1 – Creating an Application Checklist166Appendix 2 – iSynergy Status170Hard Coded Object Status Codes170Appendix 3 – iSynergy Service171Basic SQL Statements175View Specific Records in Tables175Update Specific Records in Tables175View Data Events175View current Group/User Level Permissions176iSynergy Web Server, Database and Image Store178Overview178	Page Count	159
System Options162Appendix 1 – Creating an Application Checklist166Appendix 2 – iSynergy Status170Hard Coded Object Status Codes170Appendix 3 – iSynergy Service171Basic SQL Statements175View Specific Records in Tables175Update Specific Records in Tables175View Data Events175View current Group/User Level Permissions176iSynergy Web Server, Database and Image Store178Overview178	System Maintenance	161
Appendix 1 – Creating an Application Checklist.166Appendix 2 – iSynergy Status170Hard Coded Object Status Codes170Appendix 3 – iSynergy Service.171Basic SQL Statements.175View Specific Records in Tables175Update Specific Records in Tables175View Data Events175View current Group/User Level Permissions176iSynergy Web Server, Database and Image Store178Overview178	Security Manager	161
Appendix 2 – iSynergy Status170Hard Coded Object Status Codes170Appendix 3 – iSynergy Service171Basic SQL Statements175View Specific Records in Tables175Update Specific Records in Tables175View Data Events175View current Group/User Level Permissions176iSynergy Web Server, Database and Image Store176Appendix 5 – iSynergy eSpeed Database178Overview178	System Options	162
Hard Coded Object Status Codes170Appendix 3 – iSynergy Service171Basic SQL Statements175View Specific Records in Tables175Update Specific Records in Tables175View Data Events175View current Group/User Level Permissions176iSynergy Web Server, Database and Image Store176Appendix 5 – iSynergy eSpeed Database178Overview178	Appendix 1 – Creating an Application Checklist	166
Appendix 3 – iSynergy Service.171Basic SQL Statements.175View Specific Records in Tables.175Update Specific Records in Tables175View Data Events.175View current Group/User Level Permissions176iSynergy Web Server, Database and Image Store.176Appendix 5 – iSynergy eSpeed Database.178Overview178	Appendix 2 – iSynergy Status	170
Basic SQL Statements 175 View Specific Records in Tables 175 Update Specific Records in Tables 175 View Data Events 175 View current Group/User Level Permissions 176 iSynergy Web Server, Database and Image Store 176 Appendix 5 – iSynergy eSpeed Database 178 Overview 178	Hard Coded Object Status Codes	170
View Specific Records in Tables175Update Specific Records in Tables175View Data Events175View current Group/User Level Permissions176iSynergy Web Server, Database and Image Store176Appendix 5 – iSynergy eSpeed Database178Overview178	Appendix 3 – iSynergy Service	171
Update Specific Records in Tables175View Data Events175View current Group/User Level Permissions176iSynergy Web Server, Database and Image Store176Appendix 5 – iSynergy eSpeed Database178Overview178	Basic SQL Statements	175
View Data Events 175 View current Group/User Level Permissions 176 iSynergy Web Server, Database and Image Store 176 Appendix 5 – iSynergy eSpeed Database 178 Overview 178	View Specific Records in Tables	175
View current Group/User Level Permissions	Update Specific Records in Tables	175
iSynergy Web Server, Database and Image Store	View Data Events	175
Appendix 5 – iSynergy eSpeed Database	View current Group/User Level Permissions	176
Overview		
	Appendix 5 – iSynergy eSpeed Database	178
OD L V Tables and Column Dales (170	Overview	178
OBJ_X Tables and Column Roles	OBJ_X Tables and Column Roles	179
iSynergy Conceptual Schema	iSynergy Conceptual Schema	186

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.



Physical Content:

Files Correspondence Forms Reports Invoices Statements Shippers Cover Sheets Checks Photos Xrays Microfilm Anything printed or copied



Electronic Content:

Any Electronic/Computer Files: MS Word Word Perfect Excel Email PDF Documents MP3 Audio files MPEG Video Files AutoCad Drawings Electronic Photos DiCom Medical Images: Xrays, etc.. DB Reports Anything that lives on the Computer

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 checkin 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.



\\iSynergy_Storage Server\Repository\Application_Name_OBJ_1_D1_OBJ_1_D1_0001.TIF

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: <u>http://msdn.microsoft.com/en-us/sqlserver/bb671254.aspx</u>

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.

∀indows Components You can add or remove co	mponents of Windows.	ľ
		A shaded box means that only included in a component, click
Components:		
🗹 📻 Accessories and U	ilities	4.9 MB 🔺
🚽 🗹 📑 Application Server		27.4 MB 🛁
🗌 📴 Certificate Services		1.8 MB
🗆 🛄 E-mail Services		1.1 MB
Eax Services		7.9 MB 🗾
Description: Includes ASP Application Se		Services (IIS), and the
Total disk space required:	3.0 MB	Details
Space available on disk:	3450.9 MB	

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

Windows Components Wizard	×
Windows Components You can add or remove components of Windows.	t
To add or remove a component, click the checkbox. A shad part of the component will be installed. To see what's include Details.	
Components:	
Accessories and Utilities	4.9 MB 🔺
🗹 🦪 Application Server	27.4 MB 💻
E generation de la construction de la constructi	1.8 MB
🗆 🛄 E-mail Services	1.1 MB
General Services	7.9 MB 🗾
Description: Includes ASP.NET, Internet Information Service Application Server Console.	s (IIS), and the
Total disk space required: 3.0 MB	Details
Space available on disk: 3451.0 MB	
< <u>B</u> ack <u>N</u> ext >	Cancel Help

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

Application Server			×
	l be installed. To see what's in	ox. A shaded box means that only pa icluded in a component, click Details	
🔲 🚡 Application S	erver Console	0.0 MB	^
🗹 🇞 ASP.NET		0.0 MB	
🗹 👰 Enable netw	ork COM+ access	0.0 MB	
🔲 👘 Enable netw	ork DTC access	0.0 MB	
🗹 🍓 Internet Infor	mation Services (IIS)	27.4 MB	
🚽 💵 Message Qu	leuing	0.0 MB	
/			~
	soft Management Console Sna istrative interface.	ap-in for the Application Server	
Total disk space req	uired: 3.0 MB	Details	
Space available on c	disk: 3450.8 MB	Doranom	
		OK Cancel	

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.

🕽 Back 🔹 🔿 🦂 😰 🐔 🔎 Search 👷 Favo	onites 😧 🙆 - 🚴 🔟 - 🚺	7 41	
gdress) http://localhost/lSynergy/web/search/Search			-> Go
DISYNERGY Results Search Workflow Indexing Routing Admi	Giobal Search		
pplication: Office Manager	₽⊲₽₿₿⊝	PURCHASE REQUEST FORM	rix.
Office Manager	Re	ords: 21 Register Yons: <u>Any Historie</u> Date Nedict. versor: <u>Office Deput</u> (Depute Deput	
File Edit Note Order Date Name BatchiD O	rder Number Order Status	TugePoynert Helloot	
	712191 Pending	Supply Is this for a dent	
	712192 Pending	PURPOSE OF REQUEST:	
🗏 🛃 🥒 🛄 12/19/2007 Kalle Grace 1058		Supply Deex. Supply	
🗆 🛃 🥕 🛄 12/19/2007 Katle Grace 🛛 1059		Suppy	
	712195 Pending	Supply Dem a contract Dame Description (contract Price	1000
	1 Pending	Protection and a speed participant of the second speed partici	
Add 12/20/2007 Allision Comine 0		Supply 4030 907	
	3 Pending	54507 B.0	
I 2007 Allisien Comine 1038		635	
	1001 Order Request Recei	ed Supply 6.8 698	
Select All results		900 900 900	
arder Date		11 Andreadala	
lame 🗖		Department My 's Approval of 6	
rder Status 🔽 -choose-		nounce regioner. <u>Alloca / Wordd Web-</u> oner. <u>9/14/07</u>	
toe Type 🔲 -choose-		POINT	
SUDMIT		Order Confirmation #1	
		Criteral By	

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.

Application Pane	Document Viewer Pane
ViSYNERGY Results Global Set	
Search Workflow Indexing Routing Admin Tools Application: Checks	TIME OFF REQUEST Implayer Name: Anny McChin Requested Time: 12/172007
Payroll File Edit Note Employee Name Employee SSN HR Doc Type Employee St	Records: 4 Supervisor's Approval: Chris LewisNotes:
🗖 📩 🧷 Add Katle Grace 030-72-0031 Time Sheet Chris Le	Su Mo Tu We Th Fr Sa Su Mo Tu We Th Fr Sa Su Mo Tu We Th Fr Sa
🗖 📆 🥒 Add Katie Grace 030-72-0031 Time Sheet Nicole W	
T Nicole W	allace Pending 28 29 30 31 25 26 27 28 25 26 27 28 29 30 31
Add Kate Grace 030-72-0031 Time Sheet Nicole W Select All results Histony DELET Employee Name Employee SSN Employee SSN	April 2007 Mmx 2007 June 2007 08 to 10 to 20
Payroll Statuschoose	July 2007 Aurout 2007 Second 2007 09 No Ta's So Ta' Ta' Ta' 0 No Ta' No Ta' Ta' Ta' 0 No Ta' No Ta' Ta' 1 2 3 4 5 4 7 1 2 3 4 5 4 7 1 2 3 4 5 4 7 0 3 0 11 12 23 14 5 5 4 7 1 0 10 11 2 3 4 5 5 7 1 0 10 11 2 3 4 5 5 7

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.

<i>iSYNL</i> Results				Logout	iDatix Help
Search Workflo	w Indexing	g Routing	Admin To	ols	_
Application: HR_	Employee Vac	atior 💌	1	app 🖧 🥪 🖉	€.
Selec Pawret Docu	t All ments	Add No		Re	cords: 4
				Employee Supervisor	
🗖 📩 🗡 Add	Katie Grace	030-72-0031	Time Sheet	Chris Lewis	Pending
🗖 📘 🥖 Ndd	Katie Grace	030-72-0031	Time Sheet	Nicole Wallace	Pending
🗖 🛐 🥖 Add	Katie Grace	030-72-0031	Time Sheet	Nicole Wallace	Pending
🗖 🖪 🥖 Add	Katie Grace	030-72-0031	Time Sheet	Nicole Wallace	Pending
Select All result	S HISTO	RY	DELETE		an a she
♥ View the Document.	Edit the D Index Val)ocument ues.			

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.

· · · · · · · · · · · · · · · · · · ·	- 1990	ter an	<u>`</u>
Application:	HR_E	imployee Vac	atior 🔽
Payroll			
🔲 File Edit	Note E	Employee Name	Employ
/	Add	Katie Grace	030-72
🗖 🛃 🧷	Add	Katie Grace	030-71
🗆 🔊 🧷	Add	Katie Grace	030-72
🗆 📐 🧷	Add	Katie Grace	030-72
Select All	results	HISTOR	ι γ
and a second state of	and some	and have a se	فحدمهم

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.

ØiSYNERGY Results	Global Search	₿ ≩ ⊠ 6 îî q q ヽ ↗ ∠ □ ○ ૠ છ- :		
Search Workflow Indexing Routing A	Admin Tools	т	IME OFF REQU	JEST
Application: HR_Employee Vacation	S 🖾 🖉 🧔 🥯	Employee Name: Amy McClain	Represted Tim	n 12/17/2007
Payroll	Records: 4	Supervisor's Approval: Chris Lewis January 2007	February 2007	March 2007
File Edit Note Employee Name Employee SSN H		Su Mo Tu We Th Fr Sa 1 2 3 4 5 6	Su Mo Tu We Th Fr Sa 1 2 3	Su Mo Tu Wa Th Fr Sa 1 2 3
🗌 📆 🧷 Add Katie Grace 030-72-0031	Time Sheet Chris Lewis Pending	7 8 9 10 11 12 13 14 15 16 17 18 19 20	4 5 6 7 8 9 10 11 12 13 14 15 16 17	4 5 6 7 8 9 10 11 12 13 14 15 16 17

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 t page.	he Edit icon of the	appropriate Document displays	the Edit Index
	į	- Articles	Edit Index	
	ł	*Employee Name	Katie Grace	
	{	Employee SSN	030-72-0031	
	<pre>{</pre>	HR Doc Type	Time Sheet	•
		Employee Supervisor	Chris Lewis	
	1. A.	Payroll Status	Pending	
	2000	Pay Period		
		Status	E-Entered	
		Notes		
	ĺ		Jpdate Cancel Delete Route	
	ter and the second s		and the second	and a second second

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

ØiSY Resu	NERGY [®]	n (v ,v.	Global Search	Logout Datix Help
Search Wo	orkflow Indexing	g Routing	Admin Too	ols
Application: Payroll			\$ 🧐	⊴₽₽₽₽
Payroll				Records: 4
File Edit N	Note Employee Name	e Employee SSN	HR Doc Type E	mployee Supervisor 🖡
🗖 🟂 🧷 /	Add Katie Grace	030-72-0031	Time Sheet	Chris Lewis
🗖 🛃 🧷 /	Add Katie Grace	030-72-0031	Time Sheet	Nicole Wallace
🗆 这 🧷 /	Add Katie Grace	030-72-0031	Time Sheet	Nicole Wallace
🗆 📐 🧷 /	Add Katie Grace	030-72-0031	Time Sheet	Nicole Wallace
Select All r		RY Contraction	DELETE	

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	Old Value			
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	ela			
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		Event Data				
12/19/2007 8:01:21 AM	Import Powered By iSyn 2/25/2008 9:1	ergy - iDatix	QuickIndexer Impo	nt.			

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.

ØiSYNERGY	Logout iDatix Help	8 è ⊠ 6 iî � � □ 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
Populto		iSynergy Document Pane Top Toolbar.
Results	Global Search GLOBAL	and an another and a second

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
	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.

0 (P	Р)	0	Ş			-	•	/	× 2
							_	A.	
~~~~~		· · · · 6		·	 				r 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.

Save Options
Page Range
All     Current Page
C Pages
When saving include
All Annotations     O All Annotations Except Redactions
C No Annotations C Redactions Only
Page Format
● TIFF ○ PDF ○ JPEG
Compression AutoDetect
Color Format AutoDetect
Resolution AutoDetect
JPEG Quality 70
Low 📕 High
Save as black and white
OK Cancel

- 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.

Pr	int		?)	<
	Printer —			
	Name:	RICOH Aficio 2232C PCL 5c	Properties	
	Status:	Ready		
	Type:	RICOH Aficio 2232C PCL 5c		
	Where:	IP_192.168.1.32		
	Comment:		Print to file	
	– Print range		Copies	
	• All		Number of copies: 1 📑	
	C Pages	from: 1 to: 1		
	C Select	ion	11 22 33	
			OK Cancel	

### 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.

• All	C Current Pa	ige	1
i rages j			]
When emailing			
<ul> <li>All Annotal</li> </ul>	ions CAI	Annotations Ex	cept Redactions
O No Annota	tions C R	edactions Only	
Page Format =			
• TIFF	O PDF	O JPEG	
Compression	AutoDetect	•	
Color Format	AutoDetect	•	
Resolution	AutoDetect	•	
JPEG Quality			70
Low			▶ High
	and white		

- 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.

Settings		×
General Printing Emailing		
PDFs Use Acrobat Viewer for PDFs Excluded File-Types Extensions Add Edit Remove		
<u> </u>	ОК	Cancel

3. Click OK.

#### **Bottom Toolbar**

and the second second second second second

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

Rowered By iSynergy - iDatix	Logged in As: syssemin	I of 1 I I I I I I I I I I I I I I I I I I	
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.

Results Global Search GLOBAL	
Search Workflow Indexing Routing Admin Tools           Application:         HR_Employee Vacation	Print ? X
HR Employee Vacations Records: 2 File Edit Note Employee Name Employee SSN HR Doc Type Employee Superviso	
□     □     →     Add     Katle Grace     030-72-0031     Employee Vacation     Nicole Wallace       □     □     →     ✓     Add     Katle Grace     986-58-4658     Employee Vacation     Caroline Elizabeth	Where: IP_192.168.1.32 Comment:
Select All results	Print range     Copies     Number of copies: 1 🚊
Employee Name  HR Doc Type  Cchoose-	C Pages from: 1 to: 1 C Selection 11 22 33
Employee Supervisor  Vacation Status C-choose	OK Cancel

## **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.

Concerning and the	SYN sult	ERC s	GΥ.		Global Search	ogout iDatix Help GLOBAL
Search	Work	flow In	dexing	Routing	Admin Tools	
Applicat	ion: HR	_Employ	ee Vacati	<b>v</b> 10	<b>P</b>	₽₿₲⊙
HR En	ployee	Vacatio	ons			Records: 2
	1					
File	Edit Not	e Employe	e Name E	mployee SSN	HR Doc Type	Employee Superviso
_	Edit Not				HR Doc Type Employee Vacation	
_		d Katie (	Grace (	30-72-0031		Nicole Wallace

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.

	YNERGY arch				Global Search
earch	Workflow Indexing	Routing	Admin	Tools	
	Application: Payroll		•		
		Sta	ndard li	ndex Field.	
	Employee Name		Katie Gra	ice	
<u> </u>	Frankana Amil			and a star of the	Marken and a second state of the second

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.

	iSYNE earch	
	Application	
	DISPLAY	User Defined Index Fields.
{	Checks	То:
<pre>}</pre>	Name	
Ę	Date	To:
Ş.	Invoice #	
~~~~	Account#	
S	A summer	

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.

<i>iSYNER</i> Search	GY	Global Search GLOBA
Search Workflow	Indexing I	Routing Admin Tools
Application: Cr	iecks	
		· · · · · · · · · · · · · · · · · · ·
DISPLAY FIEL	DS CLEA	R FIELDS SEARCH
Checks		То:
	ystem	
	signed ndex	To:
	ields.	
Account # 🎽		
Pages CreatedBy CreateDate ModifiedBy ModifiedDate BatchID Object Status		To:
CreatedBy		
CreateDate		To:
ModifiedBy		
ModifiedDate		To:
BatchID		To:
Object Status		-choose-
Checked out by	user	-choose-
Records Per Pa	age	10

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.

<pre>/ ModifiedDate</pre>	To:
BatchID	To:
Object Status	-choose-

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.

11	······································	and a second and a second s	and the second s
3	BatchID	To:] 1
2	Object Status	-choose-	3 4
ł	Checked out by user	-choose-	9 1
ž	Records Per Page	A-Auto Indexing	/
2	DISPLAY FIELDS CLEAR	X-Deleted	
3		Y-Source Copy	
)		R-Data Exchange	1
Σ		B-Undefined	
ŝ.		D-Undefined	
2		F-Undefined	- 1
λ.	Save Query As	SAVE QUERY	السريات



- 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
UserProvides the ability to search for a document by choosing a user from the
drop down menu.

a second a s	<u> reneral Convergencianes en a</u>
Object Status	-choose- 🔽 🧍
Checked out by user	-choose-
Records Per Page	-choose-
DISPLAY FIELDS CLEAR	sysadmin Amy
1	Katie Grace
3	Gracie
2	Abby Doe
Service and a service of the service	and the statement of the statement of the statement

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.

a series a series and series about the series of the serie	The second s	
🖇 Records Per Page	10	· ·
	5	
DISPLAY FIELDS	LEAR 10	H S
	25	
Ş	50	
<u> </u>	100	
<u>?</u>	250	
2		
Contraction and the second statements and	for the second states of the s	And the second street of the s

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).

Ö iSYNERGY	Logout Datix Help
Search Search Workflow Indexing Rou	Global Search GLOBAL
Application: Payroll	T
Employee Name	Standard
Employee SSN	Index Field.
HR Doc Type	-choose- 🗔 🕀 🔶 Drop
Employee Supervisor	Down Index
Payroll Status	-choose-
Pay Period	To: Range
Object Status:	-choose- Index Field.
Records Per Page	10
DISPLAY FIEL	DS CLEAR FIELDS SEARCH
allowing the state of the second second	and a second

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

<i>iSYNERGY</i> Search	Logot Global Search	
Search Workflow Indexing Rout	ting Admin Tools	
Application: Payroll	×	
Standard Index Field.		
Employee Name	Katie Grace	
	and a second	

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.

ØiSYNERGY Search	Logout Date Global Search
Search Workflow Indexing Rou	tting Admin Tools
Application: Payroll	
Employee Name	Katie Grace
Employee SSN	986-58-4658 Drop Down Menu.
HR Doc Type	-choose-
Employee Supervisor	-choose- ID Documents
Payroll Status	Application W-4
Pay Period	Employee Eligibility Non-Compete
Object Status:	Job Description Insurance
Records Per Page	Disciplinary Training
DISPLAY FIEL	Employee Check List

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

1. Select the **Plus Icon**.

<i>iSYNERGY</i> Search	Global Search GLO
Search Workflow Indexing Ro	iting Admin Tools
Application: Payroll	×
Employee Name	Katie Grace
Employee SSN	986-58-4658
HR Doc Type	-choose-

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**.

1	and the second	a second a s
Ş		-choose- 🔽 🕀
Ę		Employee Check List
4	HR Doc Type	Time Sheet 🥂 🗕 🚽
7		Performance Review
ŝ		1-9
	Martin and a state of the state	and a second

3. Select **Continue**.

a for standing and Destant of Change in the sec S	-choose-	•
2	Employee Check List	- 1
HR Doc Type	Time Sheet	- 2
\	Performance Review	
	I-9 💌	
Ę	Continue	- 1
An and a state of the state of	and a second	Sec. Sec. Sec. Sec.

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.

ØiSYNERGY	Logout
Search	Global Search
Search Workflow Indexing Routing	g Admin Tools
Application: Payroll	x
Employee Name	Katie Grace
Employee SSN	986-58-4658
HR Doc Type	Time Sheet
Employee Supervisor Payroll Status Range	-choose-
Pay Period Index	11/01/2007 To: 02/15/2008

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** Fields you want to display.

Select Indexes -	Web Page Dialog	? ×
	Select the indexes you wish to view:	
	delect the indexes you wanto new.	
	Checks	
	🔽 Name	
	🔽 Date	
	Invoice #	
	🔽 Account #	
	🗹 Pages	
	CreatedBy	
	🔽 CreateDate	
	🗹 ModifiedBy	
	ModifiedDate	
	BatchID	
	Update Cancel	
سفير .	and a second	

- 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.

Ö iS	YNERGY	Logout i
Sea	arch	Global Search
Search	Workflow Indexing Routing	Admin Tools
	Application: Payroll	All indexes have been defined.
		↓ I
	Employee Name	Katie Grace
	Employee SSN	986-58-4658
	HR Doc Type	-multiple-
	Employee Supervisor	Chris Lewis
	Payroll Status	Pending 💽 🛨
	Pay Period	02/15/2008 To: 03/01/2008
	Object Status:	-choose-
	Records Per Page	10
	DISPLAY FIELDS	CLEAR FIELDS SEARCH

1. Select Clear Fields.

	and a second
Employee Name	Katie Grace
Employee SSN	986-58-4658
HR Doc Type	-multiple-
Employee Supervisor	Chris Lewis
Payroll Status	Pending 💽 💮
Pay Period	02/15/2008 To: 03/01/2008
Object Status:	-choose-
Records Per Page	10 Select Clear Fields.
DISPLAY FIELDS	CLEAR FIELDS SEARCH

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

	an an ann an
Employee Name	· · · · · · · · · · · · · · · · · · ·
Employee SSN	
HR Doc Type	-choose-
Employee Supervisor	
Payroll Status	-choose-
Pay Period	To:
Object Status:	-choose-
Records Per Page	5
DISPLAY FIELDS	CLEAR FIELDS SEARCH
	an a

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.

5	n <u>zannessene</u> (200	tradition of the second second	* 		ورامستري سامير والمرابي والمساور المتحصيرين	
3	Edit Delete	Zip	Text	5		#####
No.	Update Cancel	Zip + 4	Text	10		##############
5	and wat	and the second		يعقمني المصفحين		

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.

ØiSYNERGY Admin	na ya ana ya mana ana ana ana ana ana ana ana ana a	,	و المرد وسرسور ومرم مدر به محرسها و ر	م الاستامين مراجع الم المراجع ا المراجع المراجع	Global Search
Search Workflow Indexing Routing Admin Tools					
	Index Types			_	Add Type
Index Type	Data Type	Length	Format	Mask	
Edit Delete Address Line 1	Text	50	and the second particular distantion and	اللي معملين معلم	and the second

Note: The Add Index Type dialog window displays.

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

×	and the second	- A construction of the second of the second
4	F	Add Index Type
- {	- -	
3		
\rightarrow	Name	
Ş	Data Type	-choose- 💌
	Length	
Ż	Mask	
Ş	Format	
2		🥊
~~~~~		Create Cancel
<u> </u>		and a second

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

	Add Index Type
Name	
🔶 🔶 Data Type	-choose-
Length	-choose- Boolean
Mask	DateTime Decimal
Format	Numeric Text
}	Create Cancel
Comment and the same and and	and the second s

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.

	و او در استان می در از سیانی	Add Index Type	An 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1
	Name		
Ş	Data Type	-choose- 💌	
✐	Length		3
~	Mask		
	Format		
		Create Cancel	

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.

	./==f=//	Add Index Type
< label{eq:starter}	Name	
	Data Type	-choose- 💌
}	Length	
} →	Mask	
Ş	Format	
		Create Cancel

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.

<hr/>		and the second
ξ		Add Index Type
ξ		
{		
\$	Name	
	Data Type	-choose- 💌
	Length	
ζ	Mask	
>	Format	
}		1
		Create Cancel
Suchas.	and the second s	the second se

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.

Ę	nya kalenda ya t	Add Index Type
ì	Name	
ł	Data Type	-choose- 💌
	Length	
{	Mask	
S.	Format	
ł	>	Create Cancel
in	مسممسم	الأحريبية فيترجب والمعجب والمرجب والمحاوي والمحا

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.

<b>WiSYNERGY</b> Admin Search Workflow Indexing Routing	Admin Tools	an a	و پر پرې د د کې د سره يې و ^{رو} د سره و رو ^{رو و} د ^{رو} د و رو	ر الایون و بالنظی و الاسان کار کار اور الاستین و الاستین و کار اور	ga — ang gangaran sa sa ang ang ang ang ang ang ang ang ang an	Global Search	
		Index Types				Add Type	
	Index Type	Data Type	-	Format	Mask		-
Edit Delete	Address Line 1 Address Line 2	Text Text	50 50	- Sandan markets and attend attends attack		50. 16 million - 1 million and a statistic state	J

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

	Index Type	Data Type	Length	Format	Mask
Ipdate Cancel	Address Line 1	Text	50		
dit Delete	Address Line 2	Text	50		

4. Select Update.

	مرد ما این ^{برای} این این میروین از داری می است کر ای	ر - المحمد المحمد المراجع في المحمد المراجع المحمد المحمد المراجع المراجع المحمد المحمد المحمد المحمد المحمد ال		Index Types
↓	Index Type	Data Type	Length	}
Update Cancel	Address Line 1	Text	50	i
Edit Doloto - alterna	Addrose Liss Suns	Tertino .	50.	a ward

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**.

ØiSYN Admin	ERGY	,	an a		**************************************	این بر دست ویسید و این ^{مر} فی م ^ر فی می این این می این این این این این این این این این ای	ـــــــــــــــــــــــــــــــــــــ	Global Search
Search Work	dlow Indexing Routing	g Admin Tools	;					
				Index Types				
	- I							Add Type
		Index Type		Data Type	Length	Format	Mask	
	EditDelete	Address Line 1		Text	50			1
	Edit Delete	Address Line 2	and the second	Text	50	al de se aufbrus , s sans		

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.

User Defined Lists	Add Item
List Items for Payroll Status Pending In Process Complete Cancelled Sort Ascending Delete	Move Up Move Down

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.

		Edit Application
		Name Office Manager
		Description
		Enabled document level security
		Default Incoming Status P
		De-Implement Update Cancel
		Index Group
lame	DataType	Index Type
Order Date	DateTime	Date
Name	Text	Name (50)
Order Number	Numeric	Number
Order Status	Select	Order Request Status
	Select	Order Doc Type
Оос Туре	Select	order beer type

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.

<b>ÖiSYNERGY</b> Admin Sarch Workflow Indexing Routing Admin Tools	Global Search
User Defined Lists	
	HR Employee Vacation Add List
User Defined List	Item Count
AP Status	4
AP Status	6
Christmas Decision	

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. <u>http://support.microsoft.com/kb/954476</u>

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

	fined Lists
	Add Li
Iser Defined List	Item Count
A/P Status	4
AP Status	6
Christmas Decision	2
Christmas Doc Type	4
Christmas Status	5
Corr Code	0
Correspondance	0
Demo Doc Type	8
Doc Type	3
<u>OB</u>	0
ile Types	11
und Program	0
Glenns List	3
Solf Doc Type	4
<u>ICFA</u>	0
lealthcare Doc Type	6
lealthcare Status	8
IR Doc Type	15
IR Employee Vacation Status	3

#### 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.

	YNER		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		, , , , , , , , , , , , , , , , , , ,	ار و این میکند میکند. میکند از میکند است اینکار این میکند ایک میکند میکنانی و اینکار این از میکند از میکند و م این این میکند میکند میکند از میکند ایک میکند ایک میکند اینکار این میکند ایک میکند ایک میکند. ایک میکند ایک میک
Search	Workflow	Indexing	Routing	Admin	Tools	
						User Defined Lists
						Approved Add Item

4. Click Add Item.



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

م المراجع المراجع المراجع المراجع المراجع . محمد المراجع ال	والمراجع والمستعد المرور المتصح ومرور والمراجع المراجع	In Devention
Ş	User Defined Lists	3
<u>}</u>	bbA	item
List Items	for HR Employee Vacation Status	1 f
		5
<pre>F</pre>		
5		Move Up
7		Move Down
<		
<b>∕ Ⅰ</b>		. J
Sort As	cending Delete	an assort

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

Sec. C	ويستحصب والمحاري والمنافع المحارك والمسترين والمرارين والمرارين والمحاوي والمحارين والمحاوي والمحاوي والمحارين	Commence para and
Ş	User Defined Lists	
Ì		2
8	Add	Item
<		
ξ I	List Items for HR Employee Vacation Status	
$\rightarrow$	Approved Denied	
5	Cancelled	1
(		Move Up
ξ		Move Down
		MOVE DOWN
5		
>	Sort Ascending Delete	
James		and a second second

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

#### 6. Select Update.

الم ماده المحمد المراجع المارية المن المراجع المراجع المراجع المراجع المحص المستحاص المادية المحصور المراجع الم
User Defined Lists
{
Add Item
List Items for HR Employee Vacation Status
Approved Denied
Cancelled
Move Up
- move op
Move Down
ζ <b>Ι</b> Ι [
Sort Ascending Delete
Delete List Cancel Update
have a series of the second

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.

User Defined Lists
List Items for HR Employee Vacation Status           Approved           Denied           Cancelled           Move Up           Move Down
Sort Ascending 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.

a fair and a second and a second second and a second second second second second second second second second s	and the second
User Defined Lists	
} []	Add Item
List Items for Misc	
Approved	
Denied	2
Cancelled	1
ž – I	Move Up
)	
	Move Down
< I I I I I I I I I I I I I I I I I I I	
	1
	-
Sort Ascending Delete	1
<u>{</u>	
Delete List Cancel U	pdate
2	
{ <b>Τ</b>	3
<pre>}</pre>	
and the second difference of the second differ	hand and a second s

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."

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.

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

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 UDLs.
- 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.

A CONTRACTOR	YNEF arch		e = - 2 e - 2 ve ve ve e	~~~~~~~~~	
Search	Workflow	Indexing	Routing	Admin	Tools
				Applic	ations
		Chacks		User C	Configuration
	Application	TChecks		Group	Configuration
				Index	Types

Note: The Application dialog window displays.

2. Select Add New Application.

<i>isynergy</i> Admin	Global Search
Search Workflow Indexing Routing Admin Tools	
Application Configuration	
-	Add New Application

iSynergy 3.9.3 SBS Advanced User Manual

Note: The Add Application dialog window displays.

3. Enter the Application name.

	Add Application
Name	Office Manager
Z	
Description	
- }	Enabled document level security
< label{eq:started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_started_startes	Exclude from global searching
<	

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.

	Add Application
Name	Office Manager
Ì	
Description	
	Enabled document level security
\$	Exclude from global searching
(   	Default Incoming Status P

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**.

	Edit Application
Name	Invoices
C Description	
Ś	Enable Revision Control
ł	🗹 Enable Revision Tracking and Audit Trail
Ş	Enabled document level security
2	Force comments on check in
3	Enable Auto Check In for annotations
	Exclude from global searching
	Default Incoming Status PI
	De-Implement Update Cancel

4. Select Delete.

والمحاصر والمحافظ المحاولة المحاصر والمراجعة والمحافظ والمحاصر والمحاص والمحافظ المحافظ المحاصر والمحافظ المحاصر والمحي	C
Edit Application	
Name Invoices	
	- 1
	1
	1
Description	
Description  Enable Revision Control  Enable Revision Tracking and Audit Trail	
Final English Contraction C	
Enabled document level security	1
Force comments on check in	
Enable Auto Check In for annotations	1
Exclude from global searching	- {
) Default Incoming Status	
	- 1
	- 3
implement Delete Update Cancel	

## **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.

$\sum_{i=1}^{n}$	Edit Application
Name	Invoices
< land	
{ →	Enable Revision Control
5	Enable Revision Tracking and Audit Trail
Lancas Anna Anna	Enabled document level security

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.

Sector and the	and a second
1	Edit Application
}	
} Name	Invoices
\$	
5	
~	
(	
ξ	Enable Revision Control
)	🗹 Enable Revision Tracking and Audit Trail
	Enabled document level security
Ì	Force comments on check in
}	Enable Auto Check In for annotations
Francisco -	Exclude from global searching

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.

prover X r	والمحاج المسادم والمعاري المساوي المستع والمستري المستري والمتعاد والمسترين والمعاري والمستعر والمستعم والمستعلم والمستعلم والمستعلم
> · · · ·	Edit Application
}	
Name	Invoices
{	
\$	
$\geq$	
	l
Description	
}	Enable Revision Control
2	Enable Revision Tracking and Audit Trail
Carrow and a second	

- 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.

	Edit Application
Name	Invoices
Ś	
2	1 1
{	
Description	L Z
}	🗹 Enable Revision Control
Ì	🗹 Enable Revision Tracking and Audit Trail
Constant and a second	Enabled document level security

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.

	SYNEF arch	IGY			Globa
earch	Workflow	Indexing	Routing	Admin	Tools
>				Applicat	ions 💋
	Application				nfiguration

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

-	User Configurati	Coloct the Ace	ess Key.
4	Access	User Name	Full Name
<u>}</u>	(See )	Amy McClain	Amy McClain
ξ.,	·····	Katie Grace	Katie Grace

- 3. Navigate to Application Permissions.
- 4. Select the Application with **Document Level Security**.

Login Expiration Never Expires Y Reset Password N	ext Login	ار مای همچنان در با این مربوب این می در از این می در با این می این از این	
System Level Permissions		Sele:	
Application Add	Application Delete	User Add	
User Update	User Delete	Index Type Add	
Index Type Update	🔲 Index Type Delete	User List Add	
User List Update	User List Delete	System Options Update	
User Group Add	User Group Update	User Group Delete	
Pre Sort Application	Pre Sort Person	InBox	
System Reporting	Remove Session	ScanDox	
Search Any User Checkout	Search All Applications Checkout	Work Item List	
Progression Studio	Reassign Tasks	Reassign Any Task	
Priority Edit		4	
User group assignments: Accounting Group View Sele	ect the Document Level Security icon.		
Application Permissions		Selec	
Application Name	Document Level Permissions	Configuration	
Checks	ALL		
GeneralCapture	ALL		
Invoices			

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

pices Permissions	
itus	state
ending Post ayment Approved ejected aid ayment Pending ew Invoices ULL	Alabama       Alaska       Arizona       Arkansas       California       Colorado       Connecticut       Delaware       Florida       Georgia
Select All	Select All

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.

	Edit Application	
Name	Invoices	
Description	✓	
	Enable Revision Control	Ì
le l	Enable Revision Tracking and Audit Trail	
Ş	Enabled document level security	1
	Force comments on check in	
a particular and the second	The second	أستعربهم

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.

Checkin Document
Comments
Type in comments regarding the changes made to the Document.
Location C:\Documents and Settings\Administrator\My Docu Browse
OK. Cancel

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.

	Edit Application			
Name	Checks			
		~		
Description				
	Enable Revision Control			
	Enable Revision Tracking and Audit Trail			
	Enabled document level security			
	Force comments on check in			
	Enable Auto Check In for annotations			
	Exclude from global searching			
	Default Incoming Status P 💌			
			Select A	dd Index
	Implement Delete Update Cancel			
	Index Group By	Index Order	Index Visibility	Add Index

4. Enter the **Index Name**.

				Index Group	By Index Orde	r Inde:	k Visibility	dd Index
	Name	DataType	Index Type		Required	Sticky	Multi-Edit	
dit	Checks	Numeric	Number	~	$\checkmark$			Delete
Edit	Name	Text	Text (50)	~				Delete
dit	Date	DateTime	Date	~				Delete
Edit	Invoice #	Text	Text (50)	~				Delete
-	Account #		Address Line 1	*				Add Cancel

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

				Index Gro	up By Index Orde	r Inde	x Visibility	Add Index	
	Name	DataType	Index Type		Required	Sticky	Multi-Edit		
<u>Edit</u>	Checks	Numeric	Number	~	$\checkmark$			Delete	
<u>Edit</u>	Name	Text	Text (50)	~				Delete	
Edit	Date	DateTime	Date	~				Delete	
<u>Edit</u>	Invoice #	Text	Text (50)	~				Delete	
	Account #		Text (25)	~				Add Can	

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

				Index Gro	up By Index Orde	er Inde:	κ Visibility	Add Index
	Name	DataType	Index Type		Required	Sticky	Multi-Edit	
<u>Edit</u>	Checks	Numeric	Number	~	$\checkmark$			Delete
<u>Edit</u>	Name	Text	Text (50)	~				Delete
Edit	Date	DateTime	Date	~				Delete
<u>Edit</u>	Invoice #	Text	Text (50)	~				Delete
	Account #		Text (25)	~				Add Cancel

#### Element Description

Required

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

Application: PO(9)	
Required Index Field	< Record 1 of 9 > >
PO Number	12367
Service and a service and	and a state of the second second second

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

A	oplication: PO(7)	
St	icky Index Field	토 🥌 Record 1 of 7 👂 키
ξ	* PO Number	43065
ξ	doc type	-choose-
$\langle \cdot \cdot \rangle$	Name	Shadow Flames
	Status	Rejected 💌
Ź	😋 🗹 Date	08/28/2008
3	المستعرب بالمسيحة الأساسطة	Name and a state of the second state of the se

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

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

1		~ 2	Ādd	12/20/200	7 Allision Corrir	ne 0	3	Pending	Supply Order Request For
200				12/20/200	7 Allision Corri	ne 1038	712196	Order Request Received	Supply Order Request For
Į			Add	12/20/200	7 Allision Corri	ne 1040	1001	Order Request Received	Supply Order Request For
0-4 A-4	۵s	elect	<b>All</b> re	sults 🗖	HISTORY		DELETE		
ŝ	Orde	r Dat	е					10	lit Indexes
<u>}</u>	Name	e					-	Wulti-Ed	lit Indexes
	Orde				100se-				

7. Select Add.

				Index Gro	up By Index Orde	r Index	<ul> <li>Visibility</li> </ul>	Add Index
	Name	DataType	Index Type		Required	Sticky	Multi-Edit	
Edit	Checks	Numeric	Number	~	×			Delete
Edit	Name	Text	Text (50)	~				Delete
Edit	Date	DateTime	Date	~				Delete
<u>Edit</u>	Invoice #	Text	Text (50)	*				Delete
	Account #		Text (25)	*				Add Cancel

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.

	Edit Application	-
Name	Checks	
Descript	ion	-
	Enable Revision Control	
	Enable Revision Tracking and Audit Trail	
	Enabled document level security	
	Force comments on check in	
	Enable Auto Check In for annotations	
	Exclude from global searching	
	Default Incoming Status P 💌	
	De-Implement Update Cancel	

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

					Index Group By Index	Order Inde	ex Visibility Add	Index
	Name	DataType	Index Type		Required	Sticky	Multi-Edit	
<u>Edit</u>	Checks	Numeric	Number	*	$\checkmark$			Delete
<u>Edit</u>	Name	Text	Text (50)	~				Delete
Edit	Date	DateTime	Date	$\sim$				Delete
Edit	Invoice #	Text	Text (50)	~				Delete
Edit	Account #	Text	Text (25)	~				Delete

#### 5. Make the appropriate changes.

			Inde	x Group By	Index Order	Index Visibili	ty A	dd Index	
	Name		DataType	Index Type		Required	Sticky	Multi-Edit	
Edit	Checks	Make the appropriate changes.	Numeric	Number	~	$\checkmark$			Delete
Edit	Name		Text	Text (50)	~				Delete
Edit	Date		DateTime	Date	~				Delete
Edit	Invoice #		Text	Text (50)	~				Delete
Update Cancel	Account #		Text	Text (50)	¥				Editing

#### 6. Select **Update**.

		Inde	x Group By	Index Order	Index Visibilit	y A	dd Index	
	Name	DataType	Index Type		Required	Sticky	Multi-Edit	
dit	Checks	Numeric	Number	~	$\checkmark$			Delete
dit	Name	Text	Text (50)	~				Delete
idit /	Date	DateTime	Date	~				Delete
<u>idit</u> 🖌	Invoice #	Text	Text (50)	~				<u>Delete</u>
Jpdate Cancel	Account #	Text	Text (50)	~				Editing

#### 7. Select Update.

				Edit Ap	plication			
			Name	Checks				
			Description	1	×			
				Enable Revision Co	introl			
				Enable Revision Tr				
				Enabled document				
				Force comments o				
				Enable Auto Check				
				Implement Delete				
					Index Group By Ind	ex Order Ind	dex Visibility Ad	d Index
	Name	DataType	Index Type		Required	Sticky	Multi-Edit	
Edit	Name Checks	DataType Numeric	Index Type Number	>	Required	Sticky	Multi-Edit	<u>Delete</u>
Edit Edit						Sticky		Delete Delete
	Checks	Numeric	Number	× ×	V			
Edit	Checks Name	Numeric Text	Number Text (50)	× × ×				Delete

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.

$\sum_{i=1}^{n}$		The second second second second second
Ş	1	User Details
ş		*
)	Username	Katie Grace
Ş	Full Name	Katie Grace
)	Email Address	katiegrace@idatix.com
5	Cost	L
ζ.	Password	
5	Confirm Password	
~ mill	a deserve and a second second	And the second

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.

Ş	Rename Group	Accounting					
1	Available Users		Group Member	s			
2 E	my McClain Speed System (atie Grace	Add Remove Add All Remove All	Gracie Abby Doe				
Update Delete Cancel							

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.

<i>©isynergy</i> Admin	Construction of the second secon
Search Workflow Indexing Routing Admin Tools	
Group Configuration	
	Add Group

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

- 3. Enter the **New Group Name**.
- 4. Select Add Group.

	Group Configurat	on
		Add G
Access	Group Name	
<b>2000</b>	Department Leads	
<u></u>	Progression Managers	
(jan)	scanning	
<u>e</u>	Temps	
	Accounting	Add Group

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

	Group Configuration	
		Add Group
Access	Group Name	
	Accounting	
<del>مەرى</del>	Department Leads	
<u></u>	Progression Managers	
<u> </u>	scanning	
( <u>)</u>	Temps	
	Accounting Add Group	

### **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.

<i>isynergy</i> Admin	
Search Workflow Index	ing Routing Admin Tools
	Group Configuration
Access	Group Name
	Accounting
<u></u>	Department Leads
<u></u>	Progression Managers
<u></u>	scanning
<b>100</b>	Temps
	and the second sec

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 Securit
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

6. Select Update.

Visynergy Admin	Global Search
Search Workflow Indexing Routing Admin Tools	
Group Name: Accounting	Update Cancel
Cabinet Management	

### **Creating a New User Account**

To add a new iSynergy User, follow these steps:

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

26	arch					Global Se	arch	GLO
h	Workflow	Indexing	Routing	Admin	Tools			
				Applica	ations			
	A	Chooko		User C	onfiguration	←	-	
	Application:	Checks		Group	Configuration			
				Index	Types			
				User D	efined Lists			
			_	Securi	ty Manager			
	Check Num	ber		System	n Options			
	Name			Rubbe	r Stamps		_	
	Name			Report	ing			
	Date			Data T	ransfer			
			_	_			_	
	Invoice Num	ber						
	Account Nur		_	Reset	iSynergy			

Note: The User Configuration dialog displays.

Admi		an a fallen an	<u>an an a</u>	Global Search	GLOBAL
Search W	orkflow Indexing	Routing Admin	Tools User Configuration		ł
			Search	60 Add User	1
Acc	ess User Name	Full Name	Member of Groups	Email	
<u></u>	allen	allen anderson			
<b>e</b>	Amy McClain	Amy McClain	Temps	amcclain@idatix.com	
· _ have a second second	brian	brian c	and the second second	and a dark a survey of the survey of the survey of the	

2. Click Add User.

	SYNI min	ERGY	بدوعلمان المسرار وروام	معین بریان می این از _{استار} و می ا	ana ang ang ang ang ang ang ang ang ang	Global Search	OUT DATIX Help
Search	Workfle	ow Indexing	Routing Admin	Tools			
				User Configuration	on		
				Searc	h	GO Add	User
	Access	User Name	Full Name	Member	of Groups	Email	
	<b>e</b>	<u>allen</u>	allen anderson				
	<u></u>	Amy McClain	Amy McClain	Temps	. mumbh subble s	amcclain@idatix.com	ال ومكافعة معام و ال

Note: This User Details dialog displays.

	SYNEF min			dan sa pangang sa pang sa pang sa		<u>'n / /</u>	
Search	Workflow	Indexing	Routing	Admin	Tools		
1 march				nta na sana da sa sa	→I	User Details	] 

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

ØiS Adı	YNEF nin	RGY	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	***** <u>-</u>		میروند. بر بر در معین بر میروند با میروند و میروند و میروند میروند میروند میروند میروند میروند میروند میروند م میروند و بر میروند میروند میروند و میرون
Search	Workflow	Indexing	Routing	Admin	Tools	
						User Details
	ىلىرى بىرى بىرى بىرى بىرى بىرى بىرى بىرى		• • • • • •	Usernar		

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

	YNEF nin			- ,		namenten aus and mentennus productions de productions d
Search	Workflow	Indexing	Routing	Admin	Tools	
					[	User Details
				Usernam	e	
~				Full Nam	-	

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

ØiS Adı	SYNEF min				and a second
Search	Workflow	Indexing	Routing	Admin Tool	s User Details
				Username	
				Full Name	•
			$\rightarrow$	Email Address	

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

ØiS Adı	YNEF nin				,	1	
Search	Workflow	Indexing	Routing	Admin 1	Tools		
						User Details	
				Username			
				Full Name			
				Email Addr	ess		
	بمريد ومقاصر وروب		$\rightarrow$	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**.

ØiS Adı	SYNEF min	RGY		t ann an that the	
Search	Workflow	Indexing	Routing	Admin Too	ls User Details
				Username	
				Full Name	
				Email Address	
				Cost	
	<u>** </u>			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.

iSYNE Admin			و بالارب و مریکی ایک از میکرد می با تیکم است می
earch Workflow	Indexing R	outing Admin Tools	5
			User Details
		Username	
		Full Name	
		Email Address	
		Cost	
		Password	
	-	Confirm Passw	ord

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

Admin	
Search Workflow Indexing Ro	outing Admin Tools
	User Details
	Username
	Full Name
	Email Address
	Cost
	Password
	Confirm Password
	Add Cancel

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.

SYNERGY Admin	ing Admin Tools	Global Search
rearch worknow indexing Rout	Group Configuration	
		Add Group
Access	Group Name	
	Accounting	
	Department Leads	
	Progression Managers	
	scanning	
<b>~~</b>	Temps	

Note: The Group Name dialog window displays.

3. Select an **Available User**.

Group Name: Accounting	Rename Group:	
• • • • • • • • • • • • • • • • • • •	Available Users	Group Members
>	→ allen anderson Amy McClain brian c ÈõUØräÜtäç espeed ESpeed System henrick HR Clerk	Add Remove Add All Remove All
	Update	

4. Select Add.



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

3. Click Update.

	Rename Group: Accounting						
3	Available Users		Group Members				
	allen anderson brian c ÈðÚøïáÚíaÇ espeed ESpeed System henrick HR Clerk HR Login ▼	Add Remove Add All Remove All	Amy McClain				
James /	Update Delete Cancel						

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.

Ć			p: Accounting			
Ĺ	Available	Users		Group Members		
	allen anderson brian c ÈðÚØíãÚíāÇ espeed ESpeed System henrick HR Clerk HR Login	•	Add Remove Add All Remove All	Amy McClain		
	Update Delete Cancel					

4. Select Remove.

	Renar Available		(Accounting	Group Members
	allen anderson brian c ÈõÚØíãÚíãÇ espeed ESpeed System henrick HR Clerk HR Clerk HR Login		Add Remove Add All Remove All	Amy McClain
Jana S		Upda		ncel

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

5. Select Update.

Rename Group	Accounting
Available Users	Group Members
Mike Kuhnsman Mortgage Login Mortgage Reviewer Patient Records Login test account test user Title Company Amy McClain	Add Remove Add All Remove All
Upda	ate Delete Cancel

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.

<i>isynergy</i> Admin		and and a second se	Global Search
Search Workflow Indexing	Routing Admin Tools		
Select the appropr	iate User (	Configuration	
User Name.		Search	G0 Add User
Access User Name	Full Name	Member of Groups	Email
illen	allen anderson		
Amy McClain	Amy McClain		amcclain@idatix.com

Note: The User Details dialog displays.

3. Select Delete.

1		an - 27 - Martin and Community	and the second
{	l l	Jser Details	
ζ			
{	Username	Amy McClain	
Ş			- 2
ŝ,	Full Name	Amy McClain	
Ś	Email Address	amcclain@idatix.com	
5		amoonam@raaax.com	
<pre>}</pre>	Cost		1
ζ.			
	Password	<b></b>	3
{	Confirm Password		
Ş		J.	1
(			
{	Update	Delete Cancel	1
ξ			
States and the	And a subschart and a	and the second s	and the second second

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

4. Select OK.

Windows	Internet Explorer	×
?	Are you sure you want to delete user: Am	iy McClain?
	OK Cancel	

### **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.

	User Permissions		
ogin Expiration Never Expires.	Read Pasaword Next Logn		Update Cancel
lystem Level Permissions			Select Al
Application Add	Application Delete	🕅 User Add	
🖓 User Update	Vser Delete	F Index Type Add	
F Index Type Update	P Index Type Delete	Viser List Add	
Voer List Update	P User List Delete	P System Options U	pdate
🗹 User Group Add	🗭 User Group Update	Vser Group Delet	,
Pre Sort Application	F System Reporting	Remove Session	
C ScanDox	R Work item List	Progression Stud	0
Reassign Tasks	Reassign Any Task	Priority Edit	
Search Any User Checkoul	E Search All Applications Checkoul		
ter group assignments: Temps: Accounting			
Application Permissions			liguration 🐖 🛋 Select Al
lopication Name	Document Level		Configuration
M Checks	ALI		13
M GeneralCapture	ALI		La Ca
P Heathcare Claims	ALL		6
	PLL		1.0

### **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.

	and the second
} } ↓	User Details
Username	testuser2
S Full Name	testuser2
Email Address	testuser2@idatix.com
< Cost	20.0000
Password	
Confirm Passwo	rd
<u>{</u>	
Upda	te Delete Cancel

#### 4. Select Update.

Note: The user returns to the User Configuration screen.

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

			User Configuration		
				Search 60 Add	User
Access	User Name	Full Name	Member of Groups	Email	
<b>``</b>	<u>allen</u>	allen anderson	Accounting, Invoice		
<b>``</b>	Amy McClain	Amy McClain	Temps, Accounting	amcclain@idatix.com	
	testuser	test user	Progression Managers	test@idatix.com	
· · · · ·	testuser2	testuser2		testuser2@idatix.com	

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.

ystem Level Permissions		<b>■</b> Sele
Application Add	Application Delete	🗖 User Add
🗆 User Update	🗖 User Delete	🗖 Index Type Add
🗆 Index Type Update	🗖 Index Type Delete	🗆 User List Add
🗆 User List Update	🗖 User List Delete	System Options Update
🗆 User Group Add	🗖 User Group Update	🗖 User Group Delete
Pre Sort Application	Pre Sort Person	🗖 InBox
System Reporting	🗖 Remove Session	🗖 ScanDox
🗆 Search Any User Checkout	Search All Applications Checkout	Work Item List
Progression Studio	🗖 Reassign Tasks	🗖 Reassign Any Task
🗆 Priority Edit		

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.
opulle	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	Provides the ability to search for a checked out document across all applications.
Checkout	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.

	User	Permissions		
ogin Expiration Never Expires 🔽 🗖 Reset Passw	and black I and			Update
system Level Permissions	ora Next Login			Sele
Application Add	☑ Application Delete		🗹 User Add	
🔽 User Update	🔽 User Delete		🗹 Index Type Add	
🗹 Index Type Update	🗹 Index Type Delete		🗹 User List Add	
🔽 User List Update	🔽 User List Delete		🔽 System Options Update	
🗹 User Group Add	🗹 User Group Update		🗹 User Group Delete	
Pre Sort Application	🔽 System Reporting		Remove Session	
🗆 ScanDox	🗹 Work Item List		🗹 Progression Studio	
🔽 Reassign Tasks	🔽 Reassign Any Task		🔽 Priority Edit	
🗹 Search Any User Checkout	Search All Applications	Checkout		
ser group assignments: Temps Accounting <u>View</u>				
opplication Permissions			Mult	i-App Configuration 🚾 📃 Sele
application Permissions		_	Mult	i-App Configuratic n 愿

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

م میں محمد میں محمد میں معلم میں معلم میں معلم میں محمد میں محمد میں معلم میں محمد میں محمد میں محمد میں محمد م Application Permissions		Multi-App Configuration 题 🛮 Select All
Application Name	Document Level Permissions	Configuration
Checks	ALL	
🗹 GeneralCapture	ALL	Single Application
🗹 Healthcare Claims	ALL	Permission.
HR	ALL	
and the first of the second	and the second	and a second device a second

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.

Application Name	Document Level Permissions	Configuration
🗆 Checks	ALL	
🗖 GeneralCapture	ALL	
🗆 Health Care Claims	ALL	
□ HR		
HR_Employee Vacations	ALL	
🗆 Invoices	ALL	
🗆 Mortgage Files	ALL	
🗆 Office Manager	ALL	

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.

	Application Level Permissions for C	Checks Update Cano
Cabinet Management		 Select
Application Update	🗖 Index Add	🗖 Index Update
🗖 Index Delete	Application Management	
Account Functionality Management		Select
C Route Application	🗖 Route Person	Indexing Edit
Indexing MultiEdit	🗖 Email	🗖 Assignment
🗖 Query Save	🗖 Query Delete	Document History Report
🗖 Document Hard Delete	🗖 Document Soft Delete	Annotation View
Annotation Edit	Annotation Add	🗖 Hide Redaction
🗖 Note Add	Note View	🗖 Print Image
🗖 Scan Image	🗖 Export	Show All Statuses
🗖 Edit Object Status	Annotation Edit Own	Revision Control
Document View Revisions	🗖 Undo Any Checkout	Download Document
Promote Revision	Delete Revision	🗖 Manual Indexing
🗆 Upload File		

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.

ccount Functionality Management		Select Al
Route Application	🗹 Route Person	🗹 Indexing Edit
Indexing MultiEdit	🗹 Email	🔽 Assignment
🗹 Query Save	🗹 Query Delete	🗹 Document History Report
Document Hard Delete	🔽 Document Soft Delete	Annotation View
Annotation Edit	Annotation Add	🗹 Hide Redaction
Vote Add	Vote View	Print Image
🗹 Scan Image	Export	🗹 Show All Statuses
Edit Object Status	Annotation Edit Own	Revision Control
Document View Revisions	🗹 Undo Any Checkout	🗹 Download Document
Promote Revision	Delete Revision	🔽 Manual Indexing

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** Provides the ability for system events history to be displayed with the Report Reporting functionality. **Document Hard** Provides the ability for an object to be purged from system, or true Delete 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.

<i>iSYNERG</i> Admin		an a	ر به مسلم به مای و در مربع سبی با میکم بر سید و میشیر برای میشین از با م	ویک است. اور با اور با اور با اور میکنید و میکنند و با این این این این این این اور این اور این اور این اور این	Global Search
Search Workflow In	dexing Routing Ad	nin Tools			
			User Configuration		
				Search	60 Add User
Access	User Name	Full Name	Member of Groups	Email	
	<u>allen</u>	allen anderson			
	Amy McClain	Amy McClain	Temps, Accounting	amcclain@idatix.com	

Note: The selected User Permissions dialog displays.

4. Navigate to Login Expiration.

ØiS Adr	YNERGY' nin	
Search	Workflow Indexing Routing Admin Tools	
	User Name: Amy McClain Full Name: Amy McClain	
·····	Login Expiration Never Expires Reset Password Next Log	1

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

<b>Ö</b> iSYNE	BGY			ł
Admin				l
Search Workfl	ow Indexing	Routing A	Admin Tools	ł,
ξ υ	ser Name: Amy M	IcClain Full Name:	e: Amy McClain	1
ζ.				
				1
) U	ogin Expiration Ne	ever Expires	🔽 🗖 Reset Password Next Login	ł
$\rangle$	4.5	sable Account		
}		Veek (7 Days)	¥	ł
}		Veeks (14 Days) Ionth (30 Days)		j.
}	Index Add 3 M	Ionthe (00 Dave)		Ĩ
Ş	Index Type 6 N	Ionths (90 Days) (ear (365 Days)		ŝ
1	User List / Ne			Ś

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

ØiS Adr	YNERGY nin	5
Search	Workflow Indexing Routing Admin Tools	
	User Name: Amy McClain Full Name: Amy McClain	a sharan a sharan a
{	Login Expiration Never Expires Reset Password Next Login	}

6. Select the Appropriate System Level Permissions.

Application Add	Application Delete	🔽 User Add
🔽 User Update	Vser Delete	🔽 Index Type Add
🗹 Index Type Update	🗹 Index Type Delete	🗹 User List Add
🔽 User List Update	🔽 User List Delete	🔽 System Options Update
🗹 User Group Add	🗹 User Group Update	☑ User Group Delete
Pre Sort Application	✓ Pre Sort Person	✓ InBox
🗹 System Reporting	Remove Session	🗹 ScanDox
🔽 Search Any User Checkout	Search All Applications Checkout	Vork Item List
Progression Studio	🗹 Reassign Tasks	🗹 Reassign Any Task

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

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

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

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

8. Click Update.

ØiSYNERGY Admin	Global Search
Search Workflow Indexing Routing Admin Tools	
User Name: Amy McClain Full Name: Amy McClain	Update Cancel
Login Expiration Never Expires 🔽 🏳 Reset Password Next Login	and the second sec

# **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.

		SYNEF outing	RGY"			Log Nobal Search	out iDatix Hel
ea	rch	Workflow	Indexing	Routing	Admin	Tools	
_							
	1	Checks					
	2	Health Care C	laims				
	3	HR					
	4	HR_Employe	e Vacations				
	5	Invoices					
	6	Mortgage File	s				
	7	Office Manag	er				
	0	Assign to Use	er/Group			-choose	-

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.

	SYNERGY guting	GLOBA
rct	Workflow Indexing Routing Admin	Tools
1	Checks	
2	Health Care Claims 🛛 🚽	- Applications
3	HR	
4	HR_Employee Vacations	
5	Invoices	
6	Mortgage Files	
7	Office Manager	
-	Assign to User/Group	-choose-
<u> </u>	Assign to oser/ordp	-choose-
	Users ——	ESpeed System Amy McClain Katie Grace Gracie Abby Doe
	Groups —	+R Accounting Managers

# **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.

Logout Data: Help Cicbel Search GLOBAL Search Workflow Indexing Routing Admin Tools	
Application: GeneralCapture(2) Queue Indicator	Application for Employment         Position:         Date 6/10/00           Parsons Enformation
Submit Submit to RapidDoc Delete Route	City:         Cites or United in the construction of t

### **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.

<i>ÖiSYN</i> Indexi	Global Search GLOBAL
Search Workf	low Indexing Routing Admin Tools
Applicatio	n: GeneralCapture(2) Checks(0) GeneralCapture(2)
Note	Health Care Claims(0) HR(0) HR_Employee Vacations(0 Invoices(0) Mortgage Files(0)
	Office Manager(1) Submit Submit to RapidDoc Delete Route

### 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.

20	outing	Logout iDatix
rch	Workflow Indexing Routing Admin To	ols
	< < Record 1 of 2 > >	
1	Checks	
2	Health Care Claims	ĺ
3	HR	ĺ
4	HR_Employee Vacations	ĺ
5	Invoices	ĺ
6	Mortgage Files	ĺ
7	Office Manager	
-		
0	Assign to User/Group	-choose- 💌
		-choose-
	Users>	ESpeed System Amy McClain
	03013	Katie Grace
		Gracie
		Abby Doe
		HR
	Groups>	Accounting
	Groups—	Manage <u>s</u> 🔬 🖌

### 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.

Search Workflow Indexing Routing Admin Tools GeneralCapture	iSYNERGY 1Box		Global Search	G
	h Workflow Indexing	g Routing Admin	Tools	
	alCaptura			
File Assigned Route	Assigned	Route		
T 10/13/2008 4:18:10 PM Route	10/13/2008 4:18:10 PM	Route		

The Table Title displays from which Application the sent Document(s) originated.
earch	Workflow	Indexing	Routing	Admin	Tools	
enera	alCapture					
ile	Assigned			Route		
<b>x</b>	10/13/2008 4:	18:10 PM		Route	_	
ealth	Care Claims					
ile	Assigned			Route		
<b>×</b>	10/13/2008 4:	23:10 PM		<u>Route</u>		
voice	s					
ile	Assigned			Route		
1	10/13/2008 4:	23:49 PM		Route		

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.

<b>ViSYNERGY</b> Routing	Clobal Search	
Search Workflow Indexing Routing Admin Tools           1         Checks         2         Health Care Claims		Adobe [®] Acrobat [®] 7.0 Standard
3 HR 4 HR_Employee Vacations	Select the Application to route the	About the built-in help features Using Help for vision- and motor-impaired users
5 Invoices 6 Mortgage Files	Document to.	Ocening the Help documentation Using the How To pages Using Asrebut Online
7 Office Manager	and the state of the	Accessing the Adobe Solutions Network Using coline support Customer support

Note: A Microsoft Internet Explorer dialog displays.

Μ	Microsoft Internet Explorer								
The index values will be lost if index fields do not match. Countinue wit									
		Cancel							

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.

Workflow Indexing Routing Admir	n Tools	:	:			(ir,
			PURCHASE REQU	JEST FORM		iσητίχ
1 Checks			Requestor Name:	Steve Lomica	Date Needer	d: 15-Jul
2 Health Care Claims			Vendor:	Office Depot	Shipping Methor	d:
3 HR			Total:		Payment Methor	d:
4 HR_Employee Vacations			Is this for a client:	No X Client Name:		
5 Invoices			PURPOSE OF REQUEST:			
6 Mortgage Files			USB TO PS2 CONVERTER FOR	KEYBOARD		
7 Office Manager						
			Item # Item 738428 PS2 MOI	n Description JSE TO USB ADPT	Qty Price 1 \$4.59	\$4.59
0 Assign to User/Group	-choose-			tax	1 \$0.32	\$0.00
						\$0.00

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**.

<i>isynergy</i> InBox		, ,		Global Search	IDatix
Search Workflow Indexing	Routing	Admin	Tools		
5	Pre-Sort	t General C	apture		
SeneralCapture	<b>Inbox</b>				

2. Select Route.

	iSYNEF 1Box	RGY			Global Sec
Searc	h Workflow	Indexing	Routing	Admin	Tools
Gener	alCapture				/Select
File	Assigned			Route	Route.
Z	10/13/2008 4:1	8:10 PM	State of the second	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**.

Start of Contract of Contract	SYNEF Box	RGY [.]		.~		Global Search	GLOB
Search	Workflow	Indexing	Routing	Admin	Tools		
}			Pre-Sort	General C	apture		
GeneralC	apture	-	Inbox	Poute			

2. Select Route hyperlink.

	SYNEF Box	RGY [.]		·~ ·~~ ·		Global Sea
Search	Workflow	Indexing	Routing	Admin	Tools	
General	Capture				∕ Sel	ect
File 4	Assigned			Route	🖌 Rοι	ute. 📲
▶ .	10/13/2008 4:1	8:10 PM		Route		3
,		and the second second second	and the second second	Anna attabased	a ana sa	Suma

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

<i>Öi</i> S InE	SYNERGY Box
Search	Workflow Indexing Routing Admin Tools
1	
	1 Checks
\$	2 Health Care Claims
	3 HR
1	4 HR_Employee Vacations
1	5 Invoices
}	6 Mortgage Files
	7 Office Manager
a	·
	0 Assign to User/Group
and the second	And a good of the second standing of the second standing of the second s

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.

Re	sults	RGY				Global Search	n j	GLOBAL
Search	Workflow	Indexing	Routing	Admin	Tools			
Applicati	on: Health C	are Claims	•	1	چ 🧐	P 👼 🧔 🤇	•	
Health	Care Claim	s Righ	nt-click	the Fi	le icor	ı.	Re	cords: 1
🔲 File	Note Claim :	# Policy #	Name	Payment	Status Da	te Doc Type Sta	atus Pages	CreatedE
	Add 100820		eremiah Map				0	sysadmi

2. Select Edit Indexes.

<b>Ois</b>	SYNEF sults	RGY.	~~~~	~~~ <u>~</u> ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Crover.	Global Search		GLOBAL
earch	Workflow	Indexing	Routing	Admin	Tools			
pplicatio	on: Health C	are Claims			<b>9</b> 🖂	₽₽₽₽		
, <mark>ealth</mark>	Care Claims	s					Rec	cords: 1 🍨
File	Note Claim #	Policy #	Name	Payment	Status Da	te Doc Type Status	Pages	CreatedB
{ 🗆 📝	Add 1008200	08 Je	remiah Mape	es			0	sysadmir
	dit Indexes Checkout Download	HISTORY		DELETE			- <b>1</b> ., ,	

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

	SYNERGY [®] sults		Global Search GLOBAL
Search	n Workflow Indexing	Routing Admin Tools	
		Edit Index	
4	Claim #	10082008	
	Policy#		
	Name	Jeremiah Mapes	
	Payment Status	NULL	•
	Date		
	Doc Type	NULL	
	Status	NULL	<b>•</b>
	Status	E-Entered	<b>V</b>
	Notes		A V
	[	Update Cancel Delete Ro	ute 🔶

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.

<b>Ö</b> iSYN	NERGY'	Logout TDr
Index	ting	Global Search
Search Wor	kflow Indexing Routing Admin Tools	
Appl	ication: Checks(2)	lector
	Record 1 of 2 > 1	Document Navigation
}	* Check Number	
}	Name 📃	
Fields	Date	
2	Invoice Number	
	Notes	
~	Submit Submit to RapidDoc Delet	e Route
	an a	and an and the second s

### **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.

	SYNEF lexing			<u>ىرەسى يىكىسى،</u>	Logout iDatix Help Global Search GLOBAL
Search	Workflow	Indexing	Routing	Admin	Tools
	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.

ØiSY Inde	xing	7			Lo Global Search	gout iDatix Help
Search W	orkflow	Indexing	Routing	Admin	Tools	
Appl	ication: C	hecks(2)		•		
		1	Record	1 of 2 ≥	2	
Louise more	5-00 M.	and the second	~	المحمسيين	and the second second second	Same market

### 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.

Indexing				Global Search
arch Workflow Indexing	Routing Admin	Tools		
Application: Checks(1)	•			
Check Number				
Name				
Date				
Invoice Number				
Notes				×
	Submit Subm	it to RapidDoc	Delete Route	

### Submit

To submit an Indexed Document to iSynergy, click Submit.

<i>isynergy</i> Indexing	Ciobal Search
Search Workflow Indexin	g Routing Admin Tools
Application: Checks(2	
	Record 1 of 2 > >
* Check Number	10142008
Name	Gabriel Clayton
Date	10/14/2008
Invoice Number	10142008G1
Notes	A V
Submit	Submit to RapidDoc Delete Route

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.

<i>iSYNERGY</i>	Global Search GLOBAL
Search Workflow Indexin	ng Routing Admin Tools
Application: Checks(2	)
Check Number	10142008
Name	Gabriel Clayton
Date	10/14/2008
Invoice Number	10142008G1
Notes	
Submit	Submit to RapidDoc Delete Route
Microsoft I	internet Explorer
2	Are you sure you want to delete this document?
	Cancel
han markene	and the second

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.

<i>isynergy</i> Indexing	Global Search
Search Workflow Indexin	ng Routing Admin Tools
Application: Checks(2	)
* Check Number	10142008A
Name	Gabriel Clayton
Date	10/14/2008
Invoice Number	1012008AG
Notes	
Submit	Submit to RapidDoc Delete Route

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.

	SYNE lexin			·	Global Search	Logout iDati: ch GL	OBAL
Search	Workflow	Indexing	Routing	Admin	Tools		
A	pprication.	Invoices(1) Checks(2) GeneralCaptu	Ire(0)				
Ş	* Invoice	Health Care C HR(0)	Claims(0)				4
		HR_Employe	e Vacations	(			
{	Date	Mortgage File Office Manage					- 3
1m			·····			· · · · · · ·	

Note: The Application with Documents that require indexing loads.

1. Enter the correct Index values for the Document.

<i>iSYNERG</i>	Lõgsul Datz Help Global Search GLOBAL	Ĩ₿≥≡≤<<    
Search Workflow Index Application: Invoices		PURCHASE REQUEST FORM
		Requestor Name: Steve Lomica Date Needed: 15-Jul
* Invoice #	7112007	Vendor: Office Depot Shipping Method:
Name	Steve Lomicka	Total: Payment Method:
Date	07/15/2007	Is this for a client: I I I Client Name:
🗡 РО#	7112007_SL	PURPOSE OF REQUEST:
Check#	9856	USB TO PS2 CONVERTER FOR KEYBOARD
* Status	Pending Post	
Notes	Desk Supply Order - A DEV - Steve Lomicka	Hem #         Hem Description         Qty         Price         Total           78421         P52 HOUSE 10 US6 ADPT         1         8455         5455           Bax         1         60-22         2532
Submit	Submit to RapidDoc Delete Route	

2. Select Submit.

<i>isynerg</i> Indexing	Global Search GLOBAL
Search Workflow Inde	xing Routing Admin Tools
Application: Invoice	s(1)
* Invoice #	7112007
Name	Steve Lomicka
Date	07/15/2007
PO#	7112007_SL
Check#	9856
* Status	Pending Post
Notes	Desk Supply Order - 🔺 DEV - Steve Lomicka 🔽
Submit	Submit to RapidDoc Delete Route
The standards and a standard and	ومرود ومرود والمحمول والمتأثرة والمنافع والمحمد والأكاف والمحمول والمحمول

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.

و و و میں اور	and the second	د مرابع المار میں المان میں				pplications.
Name	DataType	Index Type	·	Required	Sticky	Multi-Edit
Employee Name	Text	Name (50)	V	$\checkmark$		$\checkmark$
Employee SSN	Text	SSN	V	Γ	Γ	
HR Doc Type	Select	HR Doc Type	V			$\checkmark$
Employee Supervisor	Text	Name (50)	<b>V</b>	Γ	Γ	Г
Payroll Status	Select	Payroll Status	~			V
Pay Period	DateTime	Date				

To use the Multi-Edit function:

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

<i>iSYNI</i> Results	3		Global		DBAL
Search Workfle Application: Payro Payroll 1 2	oll	Routing /	Admin Tool	s S 🎾 🍻 🦈 🗨 Recon	ds:
🔲 File Edit Note	Employee Name	Employee SSN	HR Doc Type I	Employee Supervisor	Pay
🗆 🔁 🧷 🗡	Dee Dee Travis	822-84-4172	Time Sheet	Nicole Wallace	F
🗖 🔀 🖊 Add	Edward Lewis	727-77-5869	Time Sheet	Nicole Wallace	
🗖 📝 🧷 Add	Edward Lewis	727-77-5869	Time Sheet	Nicole Wallace	ŧ
🔽 🔦 🖉 对	Janice Thompson	228-42-4172	Time Sheet	Nicole Wallace	(
🔽 📩 🧷 Add	Jessica Jackson	446-58-6972	Time Sheet	Caroline Elizabeth	F
🗖 🛲 🤇 Add	Katie Stace	- 020-72-0024	-Time.Sheet	Chris Lewis	

4. Make the appropriate changes.

		-			the second second	and the second sec	and the second s	
$\Box$	File	Edit	Note	Employee Name	Employee SSN	HR Doc Type	Employee Supervisor	Payroll Status
	*	1		Dee Dee Travis	822-84-4172	Time Sheet	Nicole Wallace	Pending
	2	1	Add	Edward Lewis	727-77-5869	Time Sheet	Nicole Wallace	Pending
	2	1	Add	Edward Lewis	727-77-5869	Time Sheet	Nicole Wallace	Pending
•	2	1	Add	Janice Thompson	228-42-4172	Time Sheet	Nicole Wallace	Pending
~	凶	1	Add	Jessica Jackson	446-58-6972	Time Sheet	Caroline Elizabeth	Pending
	74	1	Add	Katie Grace	030-72-0031	Time Sheet	Chris Lewis	Pending
	*	1	Add	Katie Grace	030-72-0031	Time Sheet	Nicole Wallace	Pending
	2	1	Add	Katie Grace	030-72-0031	Time Sheet	Nicole Wallace	Pending
	2	1	Add	Katie Grace	030-72-0031	Time Sheet	Nicole Wallace	Pending
	2	1	Add	Kingsley Wallace	182-72-7442	Time Sheet	Nicole Wallace	Pending
			esults ne 🥅	HISTORY	DELET	E		
Emp	oloye	e SSN		<u>-</u>				
IR D	oc T	уре		-choose-	•			
Payı	roll S	tatus		-choose- 💌			nctionality provie update multiple	des
Pay	Peric SUBM			-choose- Pending In Process Complete Cancelled			simultaneously.	

5. Select Submit.

	File	Edit	Note	Employee Name	Employee SSN	HR Doc Type	Employee Supervisor	Payroll Status
	Z	1		Dee Dee Travis	822-84-4172	Time Sheet	Nicole Wallace	Pending
	2	1	Add	Edward Lewis	727-77-5869	Time Sheet	Nicole Wallace	Pending
	2	1	Add	Edward Lewis	727-77-5869	Time Sheet	Nicole Wallace	Pending
•	2	1	Add	Janice Thompson	228-42-4172	Time Sheet	Nicole Wallace	Pending
•	7	1	Add	Jessica Jackson	446-58-6972	Time Sheet	Caroline Elizabeth	Pending
	7	1	Add	Katie Grace	030-72-0031	Time Sheet	Chris Lewis	Pending
	7	1	Add	Katie Grace	030-72-0031	Time Sheet	Nicole Wallace	Pending
	2	1	Add	Katie Grace	030-72-0031	Time Sheet	Nicole Wallace	Pending
	2	1	Add	Katie Grace	030-72-0031	Time Sheet	Nicole Wallace	Pending
	2	1	Add	Kingsley Wallace	182-72-7442	Time Sheet	Nicole Wallace	Pending
🗆 s	elec	t All r	esults	HISTORY	DELET	E		
Empl	loye	e Nan	ne 🗖					
Empl	loye	e SSN	I 🗆	<u>-</u> -				
IR D	oc T	ype		-choose-	-			
Payr	oll St	tatus		In Process 💌				
Pay F	Perio	d						
	SUBM	п						

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

	File	Edit	Note	Employee Name	Employee SSN	HR Doc Type	Employee Supervisor	Payroll Status F
	7	Ì		Dee Dee Travis	822-84-4172	Time Sheet	Nicole Wallace	Pending
	2	1	Add	Edward Lewis	727-77-5869	Time Sheet	Nicole Wallace	Pending
	8	Ì	Add	Edward Lewis	727-77-5869	Time Sheet	Nicole Wallace	Pending
	2	1	Add	Janice Thompson	228-42-4172	Time Sheet	Nicole Wallace	In Process
	⇒	1	Add	Jessica Jackson	446-58-6972	Time Sheet	Caroline Elizabeth	In Process
	7	1	Add	Katie Grace	030-72-0031	Time Sheet	Chris Lewis	Pending
	乙	1	Add	Katie Grace	030-72-0031	Time Sheet	Nicole Wallace	Pending
	2	1	Add	Katie Grace	030-72-0031	Time Sheet	Nicole Wallace	Pending
	8	Ì	Add	Katie Grace	030-72-0031	Time Sheet	Nicole Wallace	Pending
	2	1	Add	Kingsley Wallace	182-72-7442	Time Sheet	Nicole Wallace	Pending
□ :	Selec	t All r	esults	HISTORY	DELET		and a second	

# 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.

Z	i i 🔍 🔍 🛅 🗅 🗗 😳 🥘 🕲 🛄 🗋 💻 💷 🖾 🕆 🗡 🌽 🗆 O 🍾 (
	TIME OFF REQUEST
	Employee Name: Amy McClain Requested Time: 12/17/2007
	Supervisor's Approval: Chris Lewis Notes: Notes:
	Su No Tu We Th Fr Sa Su Mo Tu We Th Fr Sa Su Mo Tu We Th Fr Sa $1 \ 2 \ 3 \ 4 \ 5 \ 6 \ 4 \ 2 \ 2 \ 2 \ 2 \ 2 \ 2 \ 2 \ 2 \ 2$

To edit a note annotation, follow these steps:

- 10. Right-click on the Annotation
- 11. Select the Annotation option.

;	Requested Tim	2 Sample Note 2 12/17/2007	
ns	Notes:		Cut Ctrl+X
007 Dh.Fr.Sa	February 2007 Su Mo Tu We Th Fr Sa	March 2007 Su Mo Tu We Th Fr Sa	Copy Ctrl+C
04 5 6	1 2 3	1 2 3	
11 12 13	4 5 6 7 8 9 10	4 5 6 7 8 9 10	Paste Ctrl+V
18 19 20	11 12 13 14 15 16 17	11 12 13 14 15 16 17	
25 26 27	18 19 20 21 22 23 24	18 19 20 21 22 23 24	Clear Del
* •	25 26 27 28	25 26 27 28 29 30 31	Properties
07	May 2007	Font	Annotation
Th Fr Sa	Su Mo Tu We Th		Himotodon
567	1 2 3	Foreground Color	/
12 13 14	6 7 8 910 :	-	
19 20 21	13 14 15 16 17	Background Color 🦰	•
26 27 28	20 21 22 23 24		
	27 28 29 30 31	Bring To Front	
		- IT - I	
		Send To Back	

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 dropdown 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.

<i>iSYNERGY</i> Search	Logout iDatix Help Global Search GLOBAL
Search Workflow Indexing R	outing Admin Tools
Application: Checks	Applications User Configuration Group Configuration
Check Number	Index Types User Defined Lists Security Manager TC System Options
Name	Rubber Stamps Reporting

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

#### 2. Select Add Rubber Stamp.

		Rubber Stan	np Configuration	Add Rubber Stamp
lame	Color	Font	Font Size	Font Style
Denied	Red	Impact	72	Bold
Received	Red	Impact	72	Bold
pproved	Red	Impact	72	Bold

Note: The Edit Rubber Stamp page displays.

3. Define the Rubber Stamp Name.

	Edit Rubber	r Stamp
Name	e Cancelled	
Color	r -choose-	
Font	-choose-	•
Font	Style -choose-	<b>•</b>
Font	Size -choose-	
{		
	Create	Cancel

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



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

1000	********	Edit Rubber Stamp	
Ę	Name	Cancelled	
Į	Color	Red 💌	
2 ->	Font	-choose-	
	Font Style	-choose- Arial	
<pre>{</pre>	Font Size	Courier New	- 1
}		Impact Lucida Sans	
~~~~		Microsoft Sans Serif	÷
)		Times New Roman	
Sec. Ander		Verdana	اقتد

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

	Edit Rubber Stamp	7
Name	Cancelled	
Color	Red	
Font	Arial	- 1
🗧 🔶 Font S	Style -choose-	
Font	Size Choose- Regular Italic Bold	
Summer of the	A CONTRACTOR AND A CONT	-tanta a

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

1000		والمستعمر والمراجع المروي والمستحد والمناص والمراجع والمستعم والمستعم المستعم والمستع المستع
)		Edit Rubber Stamp
\$		· · · · · · · · · · · · · · · · · · ·
Š.		
5	Name	Cancelled
Į.		
1	Color	Red 🔽
1	F	
5	Font	Arial 💌
5	Font Style	Bold
2	r ont otylo	
1 🍝	Font Size	-choose-
2		-choose-
3		-choose-
2		8pt
		8pt 9pt
		8pt 9pt 10pt
		8pt 9pt
		8pt 9pt 10pt
		8pt 9pt 10pt 11pt
		8pt 9pt 10pt 11pt 12pt 14pt
		8pt 9pt 10pt 11pt 12pt 14pt 16pt
		8pt 9pt 10pt 11pt 12pt 14pt 16pt 18pt
		8pt 9pt 10pt 11pt 12pt 14pt 16pt

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

3	· - ·	Edit Rubber Stamp	
<pre></pre>	Name	Cancelled	
	Color 1	Red 💌	
) (Font	Arial 💌	
(Font Style	Bold 💌	
ł	Font size	20pt 💌	
	/	Update Delete Cancel	
	<user> - Ins <date> - Ins was applie</date></user>	amps Legend sert user that applied stamp sert the date when the stamp d ert the time that stamp was	

8. Select Create.

Sec.		Edit Rubber Stamp
Ş	Name	Cancelled
ł	Color	Red 🗸
	Font	Arial 🔹
~~~~~	Font Style	Bold 🗨
Ś	Font Size	20pt 💌
ţ		
5	<b>→</b>	Create

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

				Add Rubber Stamp
lame	Color	Font	Font Size	Font Style
Denied	Red	Impact	72	Bold
Received	Red	Impact	72	Bold
Approved	Red	Impact	72	Bold
Cancelled	Red	Arial	20	Bold

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.

				Add Rubber Stamp
ame	Color	Font	Font Size	Font Style
Denied	Red	Impact	72	Bold
Received	Red	Impact	72	Bold
pproved	Red	Impact	72	Bold
Cancelled	Red	Arial	20	Bold

Note: The Edit Rubber Stamp dialog appears.

12. Make the appropriate changes.

	an an an tha tha an	Edit Rubber Stamp	
Ì	Name	Denied <mark><date></date></mark>	Ì
Į	Color	Red 🗨	1
ξ	Font	Impact 🗨	1
ž	Font Style	Bold	1
}	Font Size	77.pt 🗨	ł
	1	Update Delete Cancel	a stranger
	<user> - In: <date> - In: was applie</date></user>	tamps Legend sert user that applied stamp sert the date when the stamp d ert the time that stamp was	A CONTRACTOR OF

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

#### 13. Select Update.

	~~~~	Edit Rubber Stamp	
{ Nan	ne [Denied <date></date>	
Cok	or [Red]
Fon	t [Impact 💌]
Fon	t Style	Bold 💌	1
Fon	t Size	72pt 💌	1 3
	- 	Update Delete Can	cel

Data Transfer

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

	SYNE sults	RGY	-	Global Search	ogout iDatix Help
Search	Workflo	v Indexing	Routing	Admin Tools	
Applica	tion: HR_E	mployee Vac	atior 💌		₽₿₫⊝
HR_Er	nployee V	acations		Export	Records: 2
🔲 File	Edit Note E	mployee Name	Employee SSN	HR Doc Type	Employee Superviso
🗆 🔁	🥖 Add	Katie Grace	030-72-0031	Employee Vacation	Nicole Wallace
	🥖 Add	Katie Grace	986-58-4658	Employee Vacation	Caroline Elizabeth
C Sele	ct All results		er and a second	DELETE	

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.

ØiSYN Searc	IERGY [®]		~~~~~	Global Se	Logout	Datix He
Search Work	flow Indexing	Routing	Admin	Tools		
			Applica	ations		
Applia	ation: Checks		User C	onfiguration		
Applica	allon. Jonecka		Group	Configuration		
			Index	Types		
			User D	efined Lists		
			Securit	y Manager		
Check	Number		System	Options		
Name			Rubbe	r Stamps		
Name			Report	ing		
Date			Data T	ransfer 🖌	_	
يعتضيعاني ساهتهم	out these backs and the					

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.

and a second second second	بالمراجع والمعارية المستحد المستحص والمتحر والمستحر والمستعد والمنافع والمستعد والمستعد والمستعد والمستعد
Export Name:	
Server Name:	
Remote Directory	
User Name	
Password	
Confirm Password	
Add Cancel	

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 <i>FTP Configuration</i> 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.

isynergy		Links> Logout Datix Help
Search		Global Search. 🔶 Global Search GLOBAL
Search Workflow Indexi	ng Routing	Admin Tools Menu Bar.
Application: Check	S	Application Selector Drop Down Menu
DIS	SPLAY FIELDS	CLEAR FIELDS SEARCH
Check Number		To:
Name		
Date	← User	To:
Invoice Number	Assigned	
Account Number	Index Fields	·-
Pages		To:
CreatedBy		
CreateDate		To:
ModifiedBy	←	
ModifiedDate	System Assisgned	To:
BatchID	Index	To:
Object Status:	Fields.	-choose-
Records Per Page		10
· · · · · · · · · · · · · · · · · · ·	Provides the	CLEAR FIELDS SEARCH e ability to choose which fields are displayed.
	Frovides the	e ability to choose which helds are displayed.
Save 0	luery As:	SAVE QUERY
2		
owered By iSynergy - iDatix		Logged In As: sysadm

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.

arch	Workflow Indexing	Routing	Admin	Tools	
/	Application: Invoices		•	Unspecific Searc	h.
I	nvoice #	I			
1	Name	I			
ſ	Date			To:	
F	°O#	I			
(Check#	l		To:	
8	Status		-choose-	• •	
(Object Status	j	-choose-	•	
(Checked out by user		-choose-	•	
ſ	Records Per Page	1	10	· /	

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

<i>iSYNERGY</i> Search	Global Search GLOBAL
Search Workflow Indexing Rou	uting Admin Tools
Application: Invoices	
Invoice #	
Name	
Date	To:
PO#	
Check#	To:
Status Specific	🚽 🛛 Pending Post 🔄 🕀
Object Status Search.	-choose-
Checked out by user	-choose-
Records Per Page	10 💌 🖌
DISPLAY FIELDS	CLEAR FIELDS SEARCH

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

<i>iSYI</i> Searc	NERGY [.] h	Global Search GLOBAL
	kflow Indexing Re ation: Invoices	outing Admin Tools
Invoic Name Date P0 # Checl	Complex Specific	✓ 01/01/2007 To: 12/31/2007 To: 12/31/2007
Check		Pending Post -choose- -choose- 10
	DISPLAY FIELDS	CLEAR FIELDS SEARCH

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

	SYNEF arch	RGY		<u>-,, /</u> , /-	Katie Grace	Logout iDatix Help GLOBAL
Search	Workflow	Indexing	Routing	Admin	Tools	
N	Application:				Global \$	

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.





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**.

<i>iSYNEl</i> Search	RGY [.]	Gloti
Search Workflow	Indexing Routing Ad	min T.
Application:	Checks GeneralCapture Healthcare Claims	
Employee N		
Employee S	Mortgage Files	
HR Doc Typ	Patient Records	
Employee S	Sales Orders	

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

Application: Payroll	•	All Index Fields are blank.
		1
Employee Name		
Employee SSN	<u></u>	
HR Doc Type	-choose-	• 🕀
Employee Supervisor		
Payroll Status	-choose-	• 🕀
Pay Period		To:
Object Status:	-choose-	•
Records Per Page	10	•
DISPLAY FIELDS	CLEAR FIELDS	SEARCH

5. Click the Search button.

	and the many state of the state of the state of the
Application: Payroll	•
Employee Name	
Employee SSN	
HR Doc Type	-choose- 💌 🕣
Employee Supervisor	
Payroll Status	-choose- 💌 🕣
Pay Period	То:
Object Status:	-choose-
Records Per Page	10 🔳 🕌
DISPLAY FIELDS	CLEAR FIELDS SEARCH
The second states of a second s	and a second day of the second se

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.

<i>iSYNERGY</i> Results	Logout Date	OBAL	B a 🖻 6 iî V V D 🗆 O Search Result	^₽с 🌮 ≣	-		0)ă jīć		
Search Workflow Indexing Routing /	Admin Tools	•	Document View	wer Pane	.				ίο Ιολτίχ	
Payroll 1 2	Records	s: 11	\rightarrow				ay period star ay period enc			I
 File Edit Note Employee Name Employee SSN T 2 Dee Dee Travis 822-84-4172 		r Pay F	Employee:	Amy McClain	wiste hov					
Add Edward Lewis 727-77-5869		F	Day	ady in the approj	Regular	Holiday	\$ick	Vacation	Total	
Add Edward Lewis 727-77-5869		F	Sunday	9/16/2007						1
			Monday	9/17/2007	8.00				8.00	
Add Janice Thompson 228-42-4172 2 Add Jessica Jackson 446-58-6972		In In	Wednesday Thursday	9/19/2007	8.00		A		8.00 8.00 8.00	

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

and the second second	YNEF sults	RGY	-	Global S		t iDatix Hel GLOBAL
Search	Workflow	Indexing	Routing	Admin Tools	5	
Application: HR_Employee Vacatior 🗨 😻 🖾 🔎 🏚 🤿 🕤						
No data returned from search.						
			dia	سقمقت برماديم الممري		Second Second Second

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**.

ØiSYNEI Search	RGY	Global Sea
Search Workflow	Indexing Routing Adr	nin Tools
Application:	Checks	
	GeneralCapture Healthcare Claims	
Check Num	HR HR_Employee Vacations	To:

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

<i>isynergy</i> Search	Global Search
Search Workflow Indexing	Routing Admin Tools
Application: Checks	Enter the specific Search Criteria.
Check Number	201534 To:
Name	
and the second second second	Construction of the second sec

5. Click Search.

" Share and the second s	and the second s
Application: Checks	I
,	
Ob a shallowed as	
Check Number	201534 To:
Name	
Date	To:
laurian Murahan	
Invoice Number	
Account Number	•
Pages	To:
Object Status:	-choose-
Object Status:	-choose-
Records Per Page	10 🔽 📜 🚦
DISPLAY FIELDS	CLEAR FIELDS SEARCH
DISPLAY FIELDS	CLEAR FIELDS SEARCH
the second in the second se	and the second s

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

<i>iSYNERGY</i> Results	Global Search		◙	
Search Workflow Indexing Application: Checks	Routing Admin Tools		IDatix Corporation If With Trouver for Safe To Converse 1: 3100 The FredEx Officer	201534
Checks		Records: 1	Three Hundred Forty Five Dollar	S DOLLARS 🔂 🖾
File Edit Note Check Number Na	ame Date Invoice Number Account	Number Pages	FUNDN" First Lindon National Bank	CUSTOM BUSINESS BAANCING
Add 201534 Fre	edEx 6/4/2004 123-456-01 12-34	45678 2 For	001534 0000000	576-576 000000000000000000000000000000000000

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.

Application: Checks	Enter Multiple Search Criteria
	4
Check Number	201535 To:
Name	Fredex
Date	To:
Invoice Number	
Account Number	
Pages	To:
Object Status:	-choose-
Records Per Page	10
DISPLAY FIELDS	CLEAR FIELDS SEARCH

5. Click Search.

Application: Checks	
Check Number	201535 To:
Name	Fredex
Date	To:
Invoice Number	
Account Number	
Pages	To:
) Object Status:	-choose-
Records Per Page	10
DISPLAY FIELDS	CLEAR FIELDS 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.

ØiSYNERGY		Logout i				< इ-्र =-	D (# 9) 🔊	U 🔒 🗆	
Results	Glob	al Search	GLOBAL	 -			1		
Search Workflow Indexing Ro Application: Checks		ools	⊚	N N	Aite			Origina 100	Invoice: 1111
level e e		-	Records: 1					Page:	1 of 1
nvoices		R	Records: 1	White Orchi	d Tech ACCOUNT #	(800) 333-4 9503711 BILL	444 (727) 555-6666 10	SHIP TO	
📄 File Edit Vote Invoice Number 🛛 Nar 🔲 🖃 🧷 🚺 1001111 amy m	ne Date PO N cclain 1/29/2004 25	umber Check Numb 347 2007777	er Sta Payment	TECH SPIN IN 1234 Main S Clearwater, F	reet	1234	SPIN INC Main Street water, FL 33765	TECH SPIN INC 1234 Main Street Cleanwater, FL 3	3765
HISTORY	DELETE			ORDER #	DATE SHI	PPED CUST		SHIP VIA	
Select All results	Detere			12345	1/29/200	4 Verb		UPS Ground PAYMENT TERMS	
\				PURCHASING		1/29/04 SALESPERSON		Net 20 Days CURRENCY TYPE	
tatus 🔼 -choose-	-			G.Kennedy	AGENT	AA12 Select S	outh Eastern	U.S. Dollar	
	_			REMIT TO:	00000.0	DRPORATION P	O BOX 55555 CHARLOTTE	NC 55555-6444	
Application.				QTY. SHIPPED	ITEM#	VENDORCUS ITEM #5	TOMER		EXTENSION
				1	68	68	Item One	1234.88	1234.88
ingle Task		R	Records: 2						
File Edit Note Order Number	Customer Name	Shipping Address	Status						
🗖 📩 🧷 Add 🛛 1	Amy McClain	111 Red Road	Pending		-				
🗖 📩 🥖 Add 🛛 1	Amy McClain	111 Red Road	Pending						
HISTORY	DELETE								
Select All results						-			

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

<i>isynergy</i> Results		al Search	GLOBAL
Application: Checks		a 🖉 🖗 🖗	•
Invoices		R	ecords: 1
File Edit Note Invoice Number Nam	e Date PON	umber Check Numb	er Sta
🔲 🖻 🥖 🛄 🛛 1001111 🛛 amy nc	clain 1/29/2004 25	347 2007777	Payment
Select All results	DELETE		
Status Choose-		l Search Resi splayed in Re	
		splayed in Re	
SUBMIT	Gioba are di	splayed in Re	d.
Single Task	Gioba are di	splayed in Re R	d. ecords: 2
Single Task	Globa are di	splayed in Re R Shipping Address	d. ecords: 2 Status

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.

Invoices			Sel	ect the	Index Val	ue. Record	ls: 1
1 2							
File Edit	Note I	nvoice Number	Name	Date	PO Number	Check Number	
🗆 🖻 🧷		1001111	amy moclain	1/29/2004	12-345678	2007777	Pay
🗆 🖹 🧷	Add	1002367	White Orchid	1/29/2004	12-345678	2007781	F
🗆 🔁 🧷	Add	110034	Acme Furniture Company	9/6/2006	02-255555		
🗆 🛃 🧷	Add	112234	Acme Furniture Company	9/6/2006	12-345678		
🗆 🔁 🧷	Add	112987	Acme Furniture Company	9/8/2006	12-345678		
🗆 🖻 🧷	Add	123-456-01	FredEx	6/1/2004	02-255555	201534	
🗆 🖻 🧷	Add	133-726-18	FredEx	7/14/2004	27-342828	201535	
🗆 🖻 🧷	Add	152-421-40	FredEx	8/1/2004	42-830290	201536	
🗆 🖻 🧷	Add	162-899-57	FredEx	9/1/2004	47-493320	201537	
🗆 📄 🧷	Add	183-711-92	FredEx	10/20/2004	73-478668	201538	

2. The Cross Search Results display.

\Box	File	Edit	Note	Check Number	Name	Date	Invoice Number	Account Number	Pa
		Ì	Add	2007777	White Orchid	1/29/2004	1001111	12-345678	
		1	ANd	2007778	Shadow Flames	1/29/2004	4365	12-345678	
		1	Add	2007779	WonderTech	1/29/2004	5634600	12-345678	
		1	Add	3007621	Mermaid Pictures	1/29/2004	371774	12-345678	
		1	Add	2007581	White Orchid	1/29/2004	1002367	12-345678	
		1	Add	2007780	Dayback	1/29/2004	8675309	12-345678	
		1	Add	2007776	White Orchid	1/29/2004	2245763	12-345678	
_		1	Add	201534	FredEx	6/4/2004	123-456-01	12-345678	
	ount	Numl	esults ber 🗖	HISTORY		ross Que	erty Applicatio	on	
ccc		Numl		HISTORY	c			on Recoi	rds:
nvo	SUBM SUBM	Numl IT	ber 🗖	HISTORY	c			Recor	
nvo	SUBM SUBM	Numl IT	ber 🗖		c	earch res Date	PO Number Check	Recor	tus
nvo	SUBM SUBM	Numl IT	ber 🗖	oice Number	Name	earch res Date 1/29/2004	PO Number Chec 12-345678 20	Recor k Number Sta	tus Appr
nvo	SUBM SUBM	Numl s 🚣 Cdit I	ber	oice Number 1001111 1002367	Name amy mcclain	earch res Date 1/29/2004 1/29/2004	PO Number Chec 12-345678 20	Recor k Number Sta 07777 Payment /	tus Appr

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.

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

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

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

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

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.

<i>iSYNERGY</i> Search	Logout iDatix Helt
	Global Search GLOBAL
Search Workflow Indexing Application: HR_Employ	
Employee Name	
Employee SSN	
HR Doc Type	-choose- 💽 🕀
Employee Supervisor	
Vacation Status	-choose- 💽 🕣
Object Status:	-choose-
Records Per Page	10 💌
DISPLAY FIELDS	CLEAR FIELDS SEARCH
	↓
Save Query As:	SAVE QUERY

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**.

Survey .	Save Query As:	SAVE QUERY
5	Query Name	Action
~	employee vacation	→ 🖉 × 👔
ξ.,		

- 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.

arch Workflow	w Indexing Routing Admin Tools			
y Work				[2]
Task	Process	Binder	Key Value	Priority A1
User	HR_Vacation_2	HR_Employee Vacations	222-22-2222	Low
User	HR_Vacation_2	HR_Employee Vacations	568-45-4978	Low
ty Suspended Wo	rk			[0]

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.

	kflow Inde	exing Rou	ting Adn			
n.	-			ية 😼		¢ 🗟 🕤
;					Red	cords: 11
Note	Invoice #	Name	Date	PO #	Check #	# Status
	070715_iDatix	Office Depot	7/15/2008	07152008	1001	Pending Pos
Add	10142008	Office Depot	10/14/2008		1003	Pending Pos
Add	10142008	Office Depot	10/14/2008		1003	Pending Pos
Add	10142008	Office Depot	10/14/2008		1003	Pending Pos
Add	10142008	Office Depot	10/14/2008		1003	Pending Pos
Add	10142008	Office Depot	10/14/2008		1003	Pending Pos
Add	10142008	Office Depot	10/14/2008		1003	Pending Pos
Add	10142008	Office Depot	10/14/2008		1003	Pending Pos
Add	10142008	Office Depot	10/14/2008		1003	Pending Pos
Add	13113	Office Depot	10/14/2008	131113AM	1002	Pending Pos
All re	sults	ISTORY	DELI	ETE		
	n: Note Add Add Add Add Add Add Add Add Add Ad	n: Note Invoice # 070715_Dotix Add 10142008 Add 10142008 Add 10142008 Add 10142008 Add 10142008 Add 10142008 Add 10142008 Add 10142008 Add 10142008	n: Note Invoice # Name 070715_Datix Office Depot Add 10142008 Office Depot	n: Note Invoice # Name Date 070715_Datix Orfice Depot 7/15/2008 Add 10142008 Orfice Depot 10/14/2008 Add 101142008 Orfice Depot 10/14/2008	Note Invoice # Name Date PO # 070715_Datix Orfice Depot 7/15/2008 07152008 Add 10142008 Office Depot 10/14/2008 Add 10142008 Office Depot 10/14/2008	n: Rer Note Invoice # Name Date PO # Check # 070715_Datx Office Depot 10/14/2008 07152008 1001 Add 10142008 Office Depot 10/14/2008 1003 Add 10142008 Office Depot 10/14/2008 1003

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.

	SYNEF arch	RGY.	[Global Sea	Logout iDation	OBAL
Search	Workflow	Indexing	Routing	Admin		
1	_			Applic	ations Configuration	4
AI	pplication:	hecks		*	Configuration	
{				Index	_	- 1
}				User D	efined Lists	
2	Check Numbe	ar 🗌			ty Manager	1
{	ALCON NUMBER	"		Syster	n Options	
ξ N	lame		_	Report	r Stamps	1
	Date				ing Tansfer	
A. march	and the second second second	المحمد مرجد)

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.

Ö iSYNEF	Cogout Datix Help
Search Workflow	Indexing Routing Admin Tools
Report Application:	Status Summary Generate A Status Summary Batch Report Document Count Page Count

2. Select the **Application**.

DISYNER	Global Search GLOBAL Indexing Routing Admin Tools
Report	Status Summary 💌 Generate
Application:	All Applications
	All Applications Checks GeneralCapture Healthcare Claims HR HR_Employee Vacations Invoices Mortgage Files Patient Records Payroll Sales Orders Samples Scan_Test ScanDox Signature Cards Single Task

3. Select Generate.

isyner	Cogout Datix He
	Global Search GLOBAL
earch Workflow	Indexing Routing Admin Tools
Report	Status Summary 🚽 🛛 Generate
Application:	HR_Employee Vacations

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.

isyne			Status Sum	nary	PRI
arch Workflo	Global Search GLOBAL		For HR_Employee Va	cations	
leport	Status Summary 💌 Generate	Application	Record Types	Status	Count
Application:	HR_Employee Vacations -	HR_Employee	e Vacations		
			Auto Indexing	A	0
			Corrupt	С	0
			Data Exchange	R	0
			Deleted	Х	0
			Pending	P	0
			Source Copy	Y	0
			Entered	E	16
					16

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.

Ø iSYNEF	RGY Global Search GLOBAL
Search Workflow	Indexing Routing Admin Tools
Report	Batch Report 💌 Generate
Application:	Checks
▶ User:	All Users
Date Range:	€ For Earliest - Now ▼
	O From
and the second	To:

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

Search Workflow Indexing Routing Admin Tools Report Batch Report Generate Application: Checks ▼ User: All Users ▼ Date For Earliest - Now ▼ Range: C From ▼ To: Save Report Save Public	Ö iSYNE	Copout Datix Hep
Application: Checks User: All Users Date Range: For Earliest - Now To: To: Public	Search Workflow	Indexing Routing Admin Tools
User: All Users Date Range: For Earliest - Now To: To: Save Report Save Public	Report	Batch Report 💽 Generate
Date Range: For Earliest - Now For To: Save Report Save Public	Application:	Checks
Range: • For Earliest - Now •	User:	All Users
To: Save Report Save Dublic		
-> Save Report Save Dublic		O From
		To:
	→ Save Report	

4. Select Generate.

SYNER	GY Global Search GLOB
earch Workflow Report	Indexing Routing Admin Tools Batch Report Generate
Application:	
User:	All Users
Date Range:	© For Earliest - Now
rungo.	C From
	To:
Save Report	Save Dublic Show All

The Batch Report displays.

ØiSYNER(Global Search GLOBAL dexing Routing Admin Tools				Earli			h Re	port ers, for Cheo	:	PRINT
Report	Batch Report Generate	D	Batch Time	Арр	Docs	Pages	Status	User	Station	First File	Last File
Application:	Checks	1001	2004/01/23 3:57PM	Checks	2	2	E	sysadmin	MAC	_obj_2_D1_019	_obj_2_D1_0'
User: Date	All Users	1020	2004/06/22 12:58PM	Checks	2	2	A	sysadmin	IDATIXTECH02	_obj_2_D1_030	_obj_2_D1_0:
Range:		1021	2004/06/22 1:10PM	Checks	2	2	P	sysadmin	IDATIXTECH02	_obj_2_D1_032	_obj_2_D1_0:
	To:	Tota	Is for 3 bate	hes	6	6					
3											
Save Report	Save 🗆 Public 🗆 Show All										

Document Count

To create a Document Count Report, follow these steps:

- 1. Navigate to iSynergy Menu Admin>Reporting.
- 2. Select the **Document Count** Report.

<i>isynerc</i>	V.
	Global Search GLOBAL
Search Workflow In	dexing Routing Admin Tools
Report	Status Summary 💌 Generate
Application:	Status Summary Batch Report
	Page Count

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

Ö iSYNE	Global Search
Search Workflow	Indexing Routing Admin Tools
Report	Document Count 💌 Generate
Format:	
Interval	Daily 🚹
Filter:	Daily
Application:	Weekly Wonthly
Order by:	Yearly
The sa Chard Two or and	and Barrow and a start of the s

4. Select the appropriate **Application**.

Ö iSYNER	GY.	Global Search GLOBAL
Search Workflow I	ndexing Routing Admin	Tools
Report	Document Count 🚽 Ge	enerate 🔺
Format:		
Interval	Daily 💌	1
Filter:		1
Application:	HR_Employee Vacations	8
Order by:	Checks	
Chart Type:	GeneralCapture Healthcare Claims	1
And Or Crea	HRHREmployee Vacations	
Useries	Invoices	and the second sec

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

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

<i>ÖISYNER</i>	RGY Datx
	Global Search GLOBA
Search Workflow	Indexing Routing Admin Tools
Report	Document Count 🗨 Generate
Format:	
Interval	Daily 🔽
Filter:	
Application:	HR_Employee Vacations 💌
Order by:	CreatedBy
Chart Type:	BarClustered
And Or	CreatedBy
User:	All Users
Date Range:	© For Past Month(30 days)
	C From Today
	To: Past Week(7 days) Past Month(30 days) Past Year(365 days)
and the second second	

6. Select Generate.

WiSYNER	GY'	Logout Datix Help
		Global Search GLOBAL
Search Workflow	ndexing Routing Admin T	ools
Report	Document Count 💌 Ger	nerate 🔶 🔺
Format:		4
Interval	Daily 💌	4
Filter:		
Application:	HR_Employee Vacations 💌	1
Order by:	CreatedBy 💌	1
Chart Type:	BarClustered 💌	1
And Or Cre	atedBy	l.
User:	All Users 💌	8
Date Range:	For Past Month(30 days)	-
	C From	
	To:	

7. The Document Count Report displays.

		al Search GLOBAL		Farlies			Employee Vaca	ations
arch Workflow	Indexing Routing Admin Tools			Lumos	C NOW, I OF A	rosers, for fing_	Employee vace	luons
leport	Document Count 👻 Generate	-	Crea	itedBy	12/17/2007	12/18/2007	12/19/2007	Totals
Format:			syst	admin	5	1	10	16
Interval	Daily 💌			Totals	5	1	10	16
Filter:								
Application:	HR_Employee Vacations -							
Order by:	CreatedBy							
Chart Type:	BarClustered 💌							
And Or Cr	eatedBy 👤		12/19/07					
User:	All Users 💌							
Date Range:	For Past Month(30 days)							
	C From							
	To:							

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.**

© iS	YNEF			Gk	Logout F
Search	Workflow	Indexing Rout	ing Adm	in Tools	
Report	t	Page Cour	nt 💌	Generate	
Forma	at:				1
Inte	rval	Daily 💌			1
Filter:		Daily			1
	lication:	Weekly Monthly			

4. Select the appropriate **Application**.

(<i>is</i>	YNE	RGY Global Search
Search	Workflo	Indexing Routing Admin Tools
Report	t	Page Count 💽 Generate
Form	at:	
Inte	rval	Daily 🔽
Filter:		
App	olication:	Checks
Ord	ler by:	Checks
Cha	irt Type:	GeneralCapture
	And O	Creat HR Employee Vacations

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

Ö iSYNEI	Global Search
Search Workflow	Indexing Routing Admin Tools
Report	Page Count 💽 Generate
Format:	2
Interval	Daily 💌
Filter:	
Application:	Checks
Order by:	CreatedBy
Chart Type:	BarClustered
And Or	CreatedBy
User:	All Users
Date Range:	● For Past Month(30 days) 💌
Rungo.	C From Today
	Past Week(7 days)
	Past Year(365 days)
A market and a second s	الأسبب المحافظ ومحمد ويستعد المحافظ والمحافظ والمحافظ والمحافظ والمحافظ والمحافظ والمحافظ والمحافظ والمحاف

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

6. Click Generate.

isyne	RGY.
	Global Search GLOB
Search Workflow	Indexing Routing Admin Tools
Report	Page Count 🗨 Generate 🔶
Format:	
Interval	Daily 💌
Filter:	
Application:	Checks
Order by:	CreatedBy
Chart Type:	BarClustered
And Or	CreatedBy
User:	All Users
Date Range:	For Past Month(30 days) ▼
	C From
	To:

7. The Page Count Report displays.

<i>isynel</i>	RGY [.] Global Sear	rch GLOBAL		Pa	age Coui	nt	PRI
arch Workflow		GLOBAL		Earliest - Nov	v, For All Users	, for Checks	
Report	Page Count 💽 Generate	_	CreatedBy	1/23/2004	6/25/2004	9/24/2004	Totals
Format:			Incoming	12	0	12	24
Interval	Daily		sysadmin	0	2	0	2
Filter:			Totals	12	2	12	26
Application:	Checks						_
Order by:	CreatedBy	09	1/19/04			+	
Chart Type:	BarClustered 💌	09	1/05/04				
And Or	CreatedBy •	08	/22/04				
User:	All Users		/08/04				
Date Range:	● For Past Month(30 days) ▼		//25/04				
	O From		/27/04				
	To:	06	i/13/04				
			;/30/04				
		- 05	i/16/04				Incom
wered By iSynemy -	iNatix Lo	ogged In Ast sysadmin	manation	ممير ممر المراجعين		alu - alama	.∎ sysag

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.

ØiSYNERGY Search	Global Search GLOBAL
Search Workflow Indexing Routin	ng Admin Tools
Application: Checks	Applications User Configuration Group Configuration
	Index Types User Defined Lists Security Manager
Check Number	System Options Rubber Stamps
settile charles and an and a set of the set	Reporting

Note: The Security Manager dialog displays.

		Security	Manager		
iSynergy Application Database Version: 3. Concurrent Users: 1 Maximum Licensed Current Users:	9.0	00			
Full Name	User Name	Application	IP Address	Login Time	Log Out
ESpeed System	sysadmin	iSynergy	127.0.0.1	10/14/2008 10:26:13 AM	
ESpeed System	sysadmin	iSynergy Workflow User	127.0.0.1	10/14/2008 10:26:13 AM	
					Select All Users 🗖
					Log Out
					Lug Out

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.

<i>iSYNERGY</i> Search	~~~~~~~~.	Global Search GLOBAL
Search Workflow Indexing	Routing	Admin Tools
		Applications
Application: Checks		User Configuration
Application: [Checks		Group Configuration
		Index Types
		User Defined Lists
		Security Manager
Check Number		System Options
		Rubber Stamps
Name		Reporting
Date		Data Transfer
Date		
Invoice Number		
		Reset iSynergy
Account.Number	man	a a mana a sa a sa ang ang ang ang ang ang ang ang ang an

Note: The System Options dialog displays.

in orkflor	v Indexing Routing Admin	Global Search	GL
(OTABO)	rindexing Routing Admin	System Options	
	Name	Value	
Edit	Maximum Records	10000	
Edit	Source Path	WDATIXVMDEVPRG1\Incoming\	
Edit	Repository Path	\\IDATIXVMDEVPRG1\Repository\	
Edit	Image Viewer	Control	
Edit	Login Timeout	120	
Edit	CorporateURL	http://www.google.com	
Edit	CorporateName	iDatix	
Edit	XML Cache Path	C:\Program Files\iDatixiSynergy\XMLCache	
Edit	Document Servers	http://IDATIXVMDEVPRG1/documentserver/documentservice.asmx	
Edit	License Servers	http://IDATIXVMDEVPRG1/LicenseServer/LicenseService.asmx	
Edit	Passwords Encrypted	true	
Edit	DotNet Framework URL	./installs/dotnetfx.exe	
Edit	FullText Schedule	18,8	
Edit	Data Services	http://IDATIXVMDEVPRG1/ApplicationServer/DataService.asmx	
Edit	Designer Services	http://IDATIXVMDEVPRG1/progressionserver/DesignerService.asmx	
Edit	Workflow Services	http://IDATIXVMDEVPRG1/progressionserver/WorkflowService.asmx	
Edit	Reporting Services	http://IDATIXVMDEVPRG1/ReportingServer/	
Edit	Application Servers	http://IDATIXVMDEVPRG1/iSynergy	
Edit	ScanDox	http://IDATIXVMDEVPRG1/ScanDox/default.htm	
Edit	SingleSignOn	false	

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

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.

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
- Falach All Deveringing a		·

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	Er	Error Description		
-1	IN	VALID_PRIMARY_KEY	tabase I/O that returns a primary key.	
-7	EX	CEPTION_ENCOUNTERED	Negative return	n codes
-666	UN	NINITIALIZED_INTEGER	Negative return	n codes
0	SL	JCCESS	Always zero	
1000 - 200	0 blo	ck – O/S Errors		
1001		FILE_NOT_FOUND		O/S Errors
1002		FILE_INSUFFICIENT_PERMIS	SIONS	O/S Errors
1003		FILE_LOCKED		O/S Errors
1004		IO_ERROR		O/S Errors; An external process that started, failed.
1005		EXTERNAL_PROCESS_FAILE	Đ	O/S Errors
1006		UNABLE_TO_OPEN_FILE		O/S Errors
1007		INVALID_CMD_LINE_ARG		O/S Errors
2000 – 300	0 blo	ck – Database Errors		
2001		DB_UNABLE_TO_CONNECT		Database Error
2002		DB_SQL_ERROR		The database query returned an SQL error.
2003		DB_REQUIRED_FIELD_MISSI	NG	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 blo	ock – Security errors, authentication and authorizat	tion
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_REQUIREME NTS	The password does not match the regular expression defined for validation.
3107	PASSWORD_ID_DOES_NOT_MEET_REQUI REMENTS	The password does not match the regular expression defined for validation.
3300 -3400 blog	ck – 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 b	lock – 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 b	lock – Image, Document Centric Errors	
20200	INVALID DOC TYPE	Image, document centric errors an
		invalid document type was accessed given the current context.

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

ct Explorer - 3		IDATIXTECH12.e.,d - d	boobj_2 IDATIXT	ECH12efaultIndexes	IDATIXTECH12 dbo.DataTypes	
nect • 🛃 🗉 🍸		Column Name	Data Type	Allow Nulls		
📧 🦳 Database Diagrams	- 19	ObjectID	int			
🖂 🦲 Tables		PointerToSource	varchar(255)	9		
🔃 🦾 System Tables		Status	varchar(1)	9		
∃ dooobj_1 ∃ dooobj_2		Locked	varchar(50)	R		
i doobj_23		ArchiveStatus	varchar(1)	9		
🛞 🛄 dboobj_3		Pages	int	R		
(ii) dboobj_8		CreatedBy	varchar(50)	9		
I dooobj_9 I doo.Annotations		CreateDate	datetime	R		
E do.Appleators		ModifiedBy	varchar(50)	9		
🗉 🛄 dbo.Batches		ModifiedDate	datetime	R		
🛞 🛄 dbo.Config		BatchID	int	12		
🗄 🛄 doo.DataTypes		IDX_Check_Number	int	2		
 dbo.DefaultIndexes dbo.DisplayFields 	-	IDX_Name	varchar(50)	F		
E do.DocumentStatus	-	IDX Date	datetime	P		
📧 🛄 dbo.ErrorLog	-	IDX Invoice Number	varchar(50)	2		
E do.EventLog	-	IDX_Account_Number	varchar(25)	P		
I doo.EventTypes		The second is a second se		100		

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.

1 🔽 🕫 🖬 🖷 🗖 🚬	i TZ	IDATIXTECH12.eo.App		nectedionQuery1.spice		=)
nect - 📑 📰 🍸	ĸ	Column Name	Data Type	Allow Nuls	IDATEXTECH12MXQuery1.dmx	* 2
	1	AccilcationID	int Usta Type	Alow Multi		
IDATD/TECH12 (SQL Server 9.0.3042 - sa) Databases	-	Name	varchar(50)	5		
Grand System Databases			varchar(100)	R I		
🗄 🦲 Database Snapshots		Description		2.2		
🖻 🚺 espeed	-	SourcePath	varchar(128)			
🗉 🦳 Database Diagrams		RepositoryPath	varchar(128)	9		
E 🛄 Tables		CurrentFolderCount	int	E .		
System Tables do. obj 1	133	CurrentObjectCount	int	R		
i dooobj_1		MaximumRecords	int	N N		
H doo. obj. 23	188	CreateDate	datetme	R		
dboobj_3	-	ModifiedDate	datetime	R		
🗑 🛄 dboobj_8		Locked	bit	F		
🗉 🛄 dboobj_9	-	Implemented	bit	F		
dbo.Annotations dbo.Applications		TableName	varchar(50)	2		
do. Applications do. Batches	-	DocSecurity	bit	2		
H do.Config	·	a second s				
dbo.DataTypes	100	MapId	int	V		
🗉 📑 dbo.DefaultIndexes		EnableArchive0	bit	P .		
🛞 🛄 dbo.DisplayFields	123	ArchivePath0	varchar(128)			
dbo.DocumentStatus		UseParentPath0	int			
🛞 🔤 dbo.ErrorLog	188	EnableArchive1	bit	R		
dbo.EventLog do.EventTypes		ArchivePath1	varchar(128)	R		
E do.Exports	100	UseParentPath1	int	1		
do.FTPConfig	-	DefaultIncomingStatus	varchar(50)	R		
🗉 🔄 dbo.FTPDownloads	125	ExcludeFromGlobalSea	bit	1		
🗄 🛄 dbo.FtsData			-577			
dbo.FtsHistory	-			1.3		
dbo.FtsQueue dbo.GroupPermissions						

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.

1 🕫 📶 🖓 🖳 🛄 👷	-	IDATIXTECH12bo.Ar	and the second second	TOUL INVICE	nts IDATINTECH12ed - dbo. Views	T ×
nect • 📑 = 🝸	T	Column Name	Data Type	Allow Nulls	ns Low Millioutized - doo. mens	
	- 0	AnnotationE	int	E		
		ApplicationID	int			
		ObjectID	int	C		
		Pagetkunber	int	C		
		Zörder	int	N.		
		CreatedBy	varchar(50)	C		
	-	XMLData	text			
		AnnotationType	varchar(10)			
		AnnotationGUID	uniqueidentifier	0		
		ModifiedDate	datetime	R		
		CreateDate	datetime	R		
				E		

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.

<u>GroupPermissions</u>

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

<u>UserGroups</u>

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.

<u>Users</u>

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.

<u>UserToGroup</u>

This table stores the information as to which users are assigned to which groups.



iSynergy Conceptual Schema

Legend

 Relationship between tables
 Folder to table relationship
 Document to folder relationship
 Document to table relationship