Synergy Document Management
Enterprise-Wide Document Management Solution

The Synergy Enterprise Content Management (ECM) platform enables diverse businesses to securely capture, retrieve, store, and distribute report data, electronic documents, and check images. This sophisticated solution supports virtually all types of electronic information, including reports, scanned images, PDFs, photos, sound files, application documents such as Microsoft® Office Word and Office Excel®, and essentially any electronic file that is in an industry standard format. The ability to create a secure, central document repository with immediate desktop delivery of archived documents improves enterprise-wide productivity and effectiveness, streamlines operations, supports better-informed and timelier decisions, and enhances customer service and responsiveness. ProfitStars supports diverse operational environments with the ability to seamlessly install ECM functionality in-house, or outsource document storage and management through our Synergy Express offering.

Synergy Document Management leverages state-of-the-art imaging and storage technology to provide an enterprise-wide electronic knowledge management solution. This sophisticated tool captures documents in a centralized, decentralized, or combination environment and provides storage, versioning, metadata, security, retention policies, as well as indexing and retrieval capabilities via the Internet, LAN, or WAN.

Synergy Document Management supports all types of media including scanned documents, e-mails, attachments, photos, and Microsoft Word and Excel files, and more.

A convenient version management utility facilitates a collaborative work environment and enhances productivity by allowing authorized users to “check out” document images and make content modifications such as notes and annotations. Modified document images are then “checked in” and automatically become the most current version available for enterprise-wide access. Proven security features ensure that only authorized users can modify document images and that modifications can be automatically tracked creating a valid audit trail. Users can also conduct audits for critical documents missing from a group or “set” of documents.
When combined with other Synergy modules, this solution creates a true productivity suite. The Synergy Document Tracking module provides a complete system for the efficient management of sets of information. This module uses electronic checklists to help manage and track groups of documents such as customer invoices, patient or legal portfolios, and other information. Electronic access provides the ability to search and summarize the status of checklists instantly in multiple views. Document Tracking is an instrumental module that helps with identifying compliance issues and reducing risk. Synergy eDistribution sends notices for missing, coming due and past due items, and Synergy Workflow offers handy checklists for business processes.

Synergy Document Management is another innovative ECM solution that generates material operating efficiencies, expedites research, enhances customer service and convenience, streamlines information access and distribution, and reduces labor, postage, and operating costs.
Synergy Document Management

**What It Does**

- Provides an enterprise-wide electronic knowledge management solution that leverages state-of-the-art imaging and storage technology to automate document capture, retrieval, and distribution
- Provides immediate, accurate document search and retrieval
- Supports all types of media including scanned documents, e-mails and attachments, photos, Microsoft Word and Excel files, and more
- Captures documents in a centralized, decentralized, or combination environment
- Integrates with other Synergy modules such as Synergy Document Tracking, Synergy eDistribution, Synergy Reports, and Synergy Workflow to offer robust, comprehensive document management features
- Provides defined document retention policies that govern disposition in compliance with regulations, legal stipulations, and best practices
- Provides access to documents via Internet, LAN, or WAN
- Provides full information access via Internet Explorer® and applies all associated security rules/permissions
- Provides a sophisticated, secure version management utility that allows authorized users to “check out” document images, make content modifications such as notes and annotations, and “check in” modified document images
- Tracks and logs modifications providing a valid audit trail
- Provides security masks to protect sensitive information from unauthorized viewing
- Provides cut and paste capabilities that allow the easy, secure exporting of customer-facing content into Microsoft Word and Excel documents, e-mails, and form letters
- Provides the ability to open related information with a single mouse click with the WorldLinks feature

**What It Does For Me**

- Provides an efficient single point of access to enterprise-wide documents
- Provides immediate, accurate document search and retrieval
- Eliminates lost or misplaced documents
- Enhances customer service with the ability to expedite response through immediate document access and retrieval
- Strengthens internal controls through auditing user operations such as the add, delete, modify, and report security functions at the index and page levels.
- Streamlines preparations for regulatory examinations
- Enhances productivity
- Reduces printing costs
- Eliminates microfiche, microfilm, and paper-based storage systems