

# ECM GUIDE

## PRODUCT OVERVIEW

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## Review of the iDatix iSynergy Business Automation Suite

In the confusing world of ECM, it is becoming more obvious that customers care less about what you do, and far more about how you do it. iDatix appears to understand that and this product is a good example of that trend.

iDatix promises a simple and elegant ECM solution using a browser-based interface that is full featured and ready to go “out of the box”.

The software comes ready to be installed in a Windows server environment on IIS and SQL server. Once iSynergy is running on the server, everything is configured through a straight forward browser interface using Internet Explorer.

iDatix offers all of its components as separate software that can be installed on any Windows server, and configuration occurs through the browser interface from there. In order to make things even easier, iDatix has excellent customer support available to help with setup and to give a guided demonstration of the capabilities of iSynergy.



## Simplifying the Workplace

*In the current enterprise content management marketplace, what you do is far less important than how you do it. Customers are eager to avoid steep learning curves for their workers, and in the interest of business process improvement they want a product that simply works, is intuitive, and does not require months of configuration. The iDatix iSynergy suite seems to be built for that purpose. We installed it in our office to review it, and will share the experience here with you.*

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User accounts are built in as few as six rows of information and then a page of checkboxes is used to determine what access capabilities the user will have. These checkboxes directly translate to what the user will see on her or his screen for options when he or she accesses iSynergy. There are at least 50 checkboxes to work through, excluding sub-options for each application that has been built, but the granularity of this level of user access ensures that each user will be able to only see what she is allocated to see and nothing else.

Building a user group is equally as simple. iSynergy also offers an Active Directory synchronization module that allows groups, individual accounts and respective permissions to be synched directly with the system allowing single sign-on simplicity. The new user is ready to go upon account setup, and can get started as simply as clicking on a URL link to the iSynergy server (sent through an email) and entering his username and password. iSynergy becomes immediately useable as soon as application “file cabinets” are built, and users are assigned to them.

Documents just need to be added to the application cabinets. iSynergy uses the file cabinet metaphor to describe the layout of its data repository. Data going into iSynergy can be broken out into these “cabinets”, sometimes called applications, in a similar way that

paper documents can be stored and organized into a standard file cabinet. One application cabinet may be used for holding invoices, and these invoices can be broken out within the cabinet further by company and so forth.

These applications can be segregated further for specific user access - like a file cabinet that is kept locked up in Human Resources for HR use only. Keeping this metaphor in mind makes understanding how to use iSynergy very easy. The repository can replace all of a company’s physical file cabinets and yet sit on the corner of a desk.

## Applications

Applications, the virtual “file cabinets” where each document type (checks, invoices, etc.) is stored, can be custom built to fit the needs of the organization. Key data entry indices are built using custom labels and are categorized by an array of default index types. The options can get pretty granular and it is recommended to stick with only the key indexes needed or the application building process (and resulting index entry data) can take a while. If a specific index type or list is needed and not in the default list, it can be made.

None of this process requires any programming skills - it’s all menu-driven with clear and logical steps to follow. The list and indexing customization allows the system to be built specifically for the company that

uses it in the manner they are familiar. Employees do not have to learn how to re-organize invoices by specific unfamiliar categories, for example, if the company always organized the invoices by vendor. A vendor list can be built and put into any application. New vendors are added to the list, and they are immediately available anywhere that list is used in iSynergy.

Setting up searching in iSynergy is as straight forward as building an application. Once an application is built, a search item is automatically created. I really liked this feature.

Every piece of iSynergy is interconnected, so nothing needs to be re-built in a different area to serve the same purpose. The logic behind the application is intuitive - it does what you expect it to do. A list of checkboxes allows a user to establish what indexes he wishes to use for the search criteria and in what order. Often used queries for a given search can be saved in iSynergy to make finding records even quicker. After running a couple of tests, this became a real time saver for me. Imagine what it can do for an employee always looking for all of last week’s purchase orders! Searching is intuitive, and the results are displayed in a easy to follow display screen. The screen is split to show the search results in one panel and a view of the selected document in the other panel. Right from the search pane the documents

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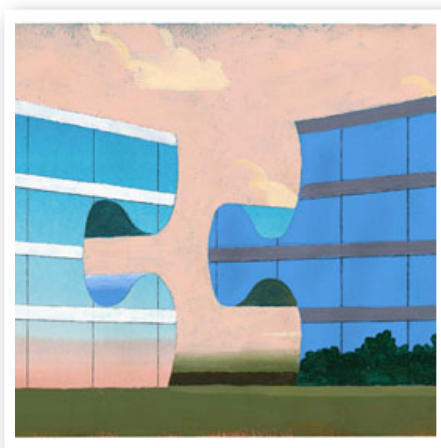
can be modified, annotated and routed. Documents from familiar applications such as Word or Excel can be modified in place. A newer version of iSynergy will allow these documents to be checked out with version control. All of these features are impressively handled through the one browser window interface. No software downloads, no complicated multiple windows opening up, just an easy to navigate browser interface.

## Adding Documents to iSynergy

Documents can be added to iSynergy multiple ways including drag-and-drop (hot folders), scanning, printing, and faxing.

Being able to add documents using drag-and-drop made it easy for me to create my test environment quickly. It also means that migrating to iSynergy for the average organization does not require a lot of time and effort. Instead of saving a document to a local folder on the computer, save it to the hot folder and its ready to go into iSynergy. iSynergy handles all types of documents (even video files, and MP3s) and gives the option of converting scanned images into TIFF, PDF, or JPEG formats. Greatest flexibility appears to come from the TIFF format

as other modules use TIFFs to perform enhanced functionality. This makes sense since most fax machines use TIFF for faxing so faxing directly into iSynergy as a TIFF lets the document get used by other modules in the iSynergy Business Automation Suite. However, PDF conversion is very convenient, and can be done by simply dragging a document to the desktop. That is a big bonus considering that any document can be annotated, or modified and converted to a PDF by anyone for anyone just by dragging it to the desktop - no per seat license for PDF converter software here.



## The iSynergy Modules

Modules allow for greater flexibility in the iSynergy Business Automation Suite. Core modules are part of the iSynergy base and allow the basic functionality of the system, and add-on modules are used to give iSynergy greater functionality and can be purchased to handle specific needs of the organization. They can assist with helping put data into the iSynergy system, or help perform work upon data once it is already in. iDatix offers a wide range of modules for iSynergy. I will talk about a few of them here.

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## ScanDox

ScanDox is a highly capable integrated scanning application for iSynergy. ScanDox can be automatically downloaded from the iSynergy server to the user's local Windows machine. This was very convenient. I asked one of my colleagues to connect to iSynergy and add ScanDox to his desktop. A few clicks to the agree button later and he was good to go. The application can be configured to give users scanning access to selected applications in iSynergy, and can provide customized configurations for a given scanner type. The configuration can be saved on the server allowing users across the enterprise to connect the same scanner model in a different location, select the appropriate profile, and immediately begin using ScanDox with all of the correct user rights and scanner configuration settings. This feature alone makes deployment across the entire organization easy. I set up a configuration for my colleague to use with his scanner and he started entering documents the way I wanted them to go into the system. No special training required!

The application is very versatile and performed well when tested with a color duplex scanner. In one configuration (profile A), it scanned both sides of an invoice in black and white leaving blank pages intact -

outputting the result as a TIFF, and in the next profile (profile B) it scanned both sides of an invoice in color and ignored blank pages - outputting the result as a PDF. It took one simple profile selection from a drop down list to make the change. Profile configuration is easy and works very well with the scanner's TWAIN drivers. ScanDox can use either its own image management settings, or enhanced settings directly from the scanner once its TWAIN drivers are installed. ScanDox has native image enhancement features like deskewing and despeckling which is terrific for cleaning up scanned documents especially if the scanner does not provide these functions on its own so the organization can stick with the scanners it owns and not worry about having to purchase new ones and repurpose the old.

User or group access can be used to determine which profiles are available. For example, one department may need to use ScanDox's profile A and will not see the profile B option in their list. All iSynergy's software applications blend seamlessly. Settings established in the core of the system carry into the more peripheral applications. Only options required for the specific software module need to be configured within the module itself. Again, I cannot say how much I like this convenience. I

did not have to tell ScanDox that I made an invoice application in iSynergy. I just had to setup a scanner configuration (once I might add) in ScanDox and associate it to the invoice application that it found on its own. Imagine how straight forward it would be to roll this out to a department, and not only do the employees see only the applications they are supposed to see, but also only the scanner configurations they are supposed to use. Eliminating confusion leads to greater acceptance.

Beyond the profile capability and granularity of configuration, ScanDox also offers many powerful indexing and sorting features. The stacking feature allows a user to scan in a large document and "stack" the pages in a book-like fashion allowing a quick skim through the document compared to endless scrolling through multiple pages. Moreover, a document can be split or combined as needed making it easy to scan in multiple documents at once, glide through the stack, and separate different documents from the group. Going one step further, ScanDox can be configured to identify a separator page, and use that as a key to split the documents automatically - a very useful feature for breaking out multiple documents in a binder for a given account. I really liked working with the stack feature. I could visually break out different items in a scanner

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*In today's world, businesses seek to save money any way possible. Whether it is by reducing waste or increasing productivity, focussing on efficiencies transfers cost savings directly to the bottom line.*

*Ofentimes, modifying how things get done yields a greater benefit than modifying what gets done. Take a look at your paperwork. Is access to these documents quick and easy? Do you control it, or does it control you?*

*Taking command of all the documents in a company can seem very daunting. Don't sweat it! The analysts at [www.techinfocenter.com](http://www.techinfocenter.com) know who handles document management best for your organization.*

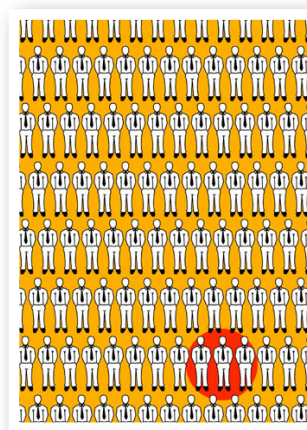
batch and see where I needed to break things out. I could also visually keep track of what documents were related to each other because I kept those documents together in a single stack.

Transfer control is an intelligent feature focussed more for the IT department and allows batches of scanned and indexed documents to be transferred to the iSynergy server continuously, or at scheduled intervals.

The ability to transfer documents to the server via a schedule allows this network bandwidth intensive process to be performed after hours or at times when users would not notice a network performance hit. Hundreds of documents can be entered during the day, and transferred (with or without encryption) overnight when no one is using the network. This feature works behind the scenes. Users still scan and submit files, they just don't send files to iSynergy if the server is located in a remote location. There is a delay getting documents into iSynergy this way, but the delay is hours and not days (or dollars) sending the information to a different location via the postal service or some other courier.

## Xtractor

The Xtractor module is a configurable auto-indexing application. It is intended for high volume environments where manual data entry would take a long time and therefore create an efficiency cost to the department. The module allows a scanned in document to be "read" via barcoding, OCR/ICR, or checkbox fields and indexed automatically by following a template and mapping out fields for barcode or character recognition.



A template is created by using an actual scanned document in TIFF format. A manager looks at the document image and adds the readable fields by selecting the region on the document that is to be read and linking the selected area to the appropriate application and index. The tight integration across all of iSynergy's modules makes tying all functionality across each module very easy. As soon as a new application file cabinet is built in iSynergy, a new template can be built for it with proper index mapping in Xtractor. The selected region can be a barcode field, a checkbox field, a machine typed field (OCR), or a handwritten field (ICR).

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Each field can be further configured to either read the literal region or to modify the region according to specific guidelines using masking.

Three template styles are offered. The standard template is used for basic indexing of a document once it enters the iSynergy system. A selection template is used for determining which specific document is being entered and selecting the appropriate template within a specific "file cabinet" (useful for multiple invoice types as an example). And finally, a routing template is used to determine under which "file cabinet" to route the document (useful for separating invoices from purchase orders, etc.). These templates are designed to cascade over one another such that a routing template can sort different document types, a separator template can determine which specific document template should be used, and finally the standard template can index the document appropriately.

The standard template is straight forward and very useful for indexing a high volume of a specific document. A separator flag may be added to one unique field of a document to help Xtractor determine separate documents in a batch. Each time Xtractor reads this field, it breaks out the particular document preventing the need to manually have to separate documents - a very beneficial step if purchase orders are being scanned in and submitted hundreds at a time. I entered many documents into iSynergy starting from completely manually one at a time to just scan them in ScanDox and have the system do all the work. I smiled on my last configuration where I just pressed the new scan button, and checked my email while my computer did everything for me.

If multiple documents are all going to the same file cabinet, the separator template can be used to break them out so they can be sorted and then indexed by the appropriate standard template. Not all invoices are going

to have the invoice number in the same location on the page or in the same format for example. This template is designed to identify which document has been scanned in, and which standard template to use to index it. To use a separator template, all the documents need to have at least one common field. The template requires a unique identifier in order to work. This can be a company name field, or a any field where a specific pattern can be recognized to determine the specific document.

A routing template is used similarly to the separator template except it is used across multiple cabinets (invoices to an invoice cabinet, checks to a check application, etc.). It reads the unique identifier field to determine where to route the document next.

Creating and using the templates is fairly easy. It is important to note however, that the fields are read based on the established coordinates of the template file. If the scanned documents change enough to shift the necessary index fields out of those specified coordinates, the auto-indexing will not work. This means that a change as simple as a new logo on an invoice that is larger or smaller than before can shift the fields out of the recognized area and a new template will have to be configured. I figured this out the hard way when I used an older TIFF image as a template for an invoice document I built.

I unconsciously added a date line to the header and shifted everything down on the document just a little. I could not get the mapping to work in the first go like I did with everything else. I knew everything was built properly because it passed Xtractor's local test. It just did not work across the real documents. As soon as I figured out my blunder, I used the new version of the document for my template and iSynergy went back to the way I was used to - working reliably and predictably.

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## Document Routing and Workflow with Progression Studio

Once documents are in the system, they can be manipulated and routed very easily. iSynergy's search capabilities can find any document in its repository, and allow a user to view it, annotate or redact the document (with permissions), and save or send it as needed. The document can also be routed to another person and rubber stamped for approval for example. Manual routing is as quick as selecting routing from the options list and selecting where it should go. Options include routing a document to a different application file cabinet, or to a different user's inbox. The inbox feature takes the document out of the general search area so it can be modified by a specific user. This may be necessary for example to allow an HR person to redact personal information from a document before it gets stored in the general HR repository. Documents can be routed directly to a person via a workflow.

Complete workflows can also be created using the Progression Studio module. This powerful module allows managers to create pre-established workflows for given document applications. The selection and routing criteria gets very granular giving this tool the highest learning curve in the overall product package,

but once learned the capabilities are great.

Progression Studio allows a manager to design a very sophisticated workflow that routes a document beginning at any point after it enters the system. The document could be automatically routed as soon as it is scanned in, or it could be in the middle of a manual route. Good workflow software is very important. It allows an organization to not only make a workflow, but also find ways to improve a workflow, alter or eliminate steps with ease and keep track of the overall process. Progression Studio handles this in a clever partitioned format - design mode and manager mode.

Having a workflow start at any point in a process is very useful. For example, most invoices processed in a department can be processed by the manager. As the documents come in, an employee scans them and puts them into iSynergy. The manager monitors for new invoices and approves or rejects them as necessary. However, if an invoice over a certain dollar amount comes in, the manager can put it into a workflow that routes the invoice automatically to the right departmental managers for the advanced approval process.

Progression Studio's layout is a graphical map of sorts showing the paths a given document can take. If the path starts getting unwieldy on one

screen, the path can be layered - providing more detail to a sub portion of the entire process. The designer mode builds the paths and sets the routing rules, and the manager mode monitors the process and provides real time statistics of performance. The dual mode layout allows for a well designed workflow - one that not only follows a formal process, but also one that improves efficiency. It is very easy to spot bottlenecks in a workflow and create improvements to the process. Statistics and reporting is voluminous providing clear detail in terms of the whole workflow down to customizable costs at each point of the process. Being able to assign costs is a good way to measure the effectiveness of the workflow process. It allows a manager to determine ways to streamline a workflow beyond just spotting bottlenecks. It also allows a manager to determine the most efficient use of her personnel - assigning the right people to do the right function.

Building the workflow can get a little complicated, again because routing documents is virtual and understanding what document needs to be routed to where for what particular reason requires an understanding of the local organization's current document routing process. Having a good solid understanding of the current workflow process at the company is very important prior to

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designing a workflow in iSynergy. The routing is essentially rules based. Different events trigger the routing process and documents are routed according to these rules.

Documents can be routed using triggers such as the dollar amount on an invoice, a date, or even a volume of documents (for example: a surge of 100 new checks scanned in may route some of the new load to an additional person to help with processing the new checks until the number goes down to a specified threshold). Waiting areas can be established to allow a document to “wait” until a corresponding document enters the system (a PO may wait until its corresponding invoice enters the system). Progression Studio actually requires training to gain the biggest benefit from it because of its capabilities. iDatix offers training seminars for this which is highly recommended.

There are also several other modules ranging from barcoding to scanning modules based on workload and scanning tasks. They all integrate seamlessly into the iSynergy Business Automation Suite and all can make different processes easier depending on the needs of the organization. iDatix works with the organization to help

choose which modules are the right fit. Modules can always be added later as the company’s needs grow.

The entire iSynergy Business Automation Suite is scalable and able to be expanded across multiple servers. Different modules can run on different servers easily distributing processor intensive tasks to systems that have the proper resources. The system could also be expanded according to the location needs of the organization and have certain applications on certain systems based on departmental functions. The core requirements for iSynergy is Windows Server and SQL Server and Internet Explorer for the browser interface.

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## Conclusion



iSynergy really can work right out of the box. The interface is sleek and intuitive. There is no initial client software to install to get users started on it, and any software that is needed downloads automatically from the server. Configuration is easy and thorough giving any user access to only the applications, views, and privileges she or he is required to utilize. This flexibility is expanded across the complete system minimizing the likelihood of configuration mistakes and confusion at the user level. The logic flows from the iSynergy Business Automation Suite core out. A user who does not have access to HR applications will not see the options for HR applications in a different module. Applications can be built with as much entry detail as a user would want and once the application is built and implemented it becomes ubiquitous across

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the system. Once an application is built, all of iSynergy and its add-on components recognize it and integrate it with no work required by the user or IT department.

The additional modules are extremely powerful allowing for easy deployment across the enterprise and consistent end user functionality. It is truly difficult to make mistakes once each module is configured correctly. Reporting and monitoring also allows for discovering bottlenecks and top performers on the system. While it is true no programming skills are required, if a stumbling block is hit during implementation iDatix has very friendly and knowledgeable support members available to help.

I was able to set up the iSynergy Business Automation Suite and create my first user accounts, and applications my first day. The trickiest part of my experience came when I had a scanner issue that had nothing to do with iSynergy, and when I botched the configuration of a template in Xtractor. Both of which were human errors well out of the scope of the Content Management Suite. iSynergy does the work for me, not the thinking. It does a great job, however, at mitigating mistakes that fall within its boundaries.

Overall, the iDatix Business Automation Suite is a very strong easy to use solution for a process intensive, document driven environment. Set up is easy, integration with an existing

Microsoft Windows environment is smooth and non-invasive, and rollout is quick through iSynergy's Internet Explorer based browser interface. Building the environment does not require programming skills, and the support staff is there when needed. One can truly say buy the iSynergy Business Automation Suite today, start saving time and money tomorrow.

-Barry Baronas, Senior Analyst

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