

The iDatix Family

Product overview of the iDatix family of solutions



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 based processes.

iSynergy is a complete solution, including all of the components necessary to provide a successful implementation to include scanning, indexing, archival, retrieval, workflow and integration to key line of business applications.

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. 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.

iSynergy captures documents from virtually any source and 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 core systems. 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.

iSynergy Enterprise Comprehensive Document Management Solution

With iSynergy, users can expect to:

- Be fully operational in as little as 3 weeks.
- Have information integrated throughout the organization without spending any additional funds for customization and integration programming.
- Implement technology that dynamically drives the business.
- Optimize the human resource as a critical and integral component of the business process.
- Enable reduction or elimination of manual administration and monitoring of document routing and handling.
- Deliver a solution easily understood by non-IT experts that automates and enforces business rules and processes.

The following features of iSynergy will drive substantial improvements to your business processes.

Browser-based User Interface — By providing a thin and intuitive browser-based user interface, your organization can easily search for, manage and modify documents from anywhere in the world. Cross-Browser capability supports Safari, Chrome, Firefox and Internet Explorer with versatile HTML5.

Mobile Support — Access your information through any mobile device to view documents, manage tasks and share information with clients. The iPhone and iPad are fully supported with gesturing capabilities enabled. Capture items remotely and submit them directly into your repository with our app mCapture, available on Android and Apple devices.

Instant Drag-and-Drop Integration — By enabling any desktop or browser-based business application to display documents from the iSynergy repository without the need for a programming or coding, iSynergy will



change the way your business shares and accesses your structured and unstructured information. With our enhanced integration component, iLink, your users can integrate any key line of business application with iSynergy to further correlate data and increase usability.

Centralized Repository — All of your structured and unstructured data goes into a centralized hub with granular security and controls to be viewed, shared, accessed and revised. Version control ensures the most current edition is available, eliminating multiple varieties of the same document, image or file. The integrity of all previous versions is maintained, providing a complete audit trail of all activity surrounding every file within the system.

Dynamic Linking — iSynergy uses common index fields to link together related documents for easy retrieval. By eliminating data “silos” as seen in traditional foldering systems, iSynergy enables documents to be found in logical and useful ways to minimize search time. For example, a user will be able to find “Invoices” and “Checks” related to a particular order number or vendor name in the same search.

Ad Hoc Workflow — Ad hoc (Latin for “for this purpose”) workflow is designed to move documents pertaining to a specific purpose, case, or situation at hand, based on the business process to which the documents belong.

The Ad Hoc Workflow pertains to the different stages your document goes through in your business process and who is responsible for handling it.

Reporting — iSynergy reporting allows users to check status of documents in the Ad-Hoc Workflow environments. For example, a Manager can generate a report to determine the number of documents in a process by status, thereby allowing a decision to be made on allocation of resources.

iSynergy Server

Browser-Based Digital Document Repository

iSynergy Server is the heart of the iDatix 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 ROIs from labor reduction and productivity improvement almost immediately after implementation.

MULTIFUNCTION SERVICE

MultiFunction Service "breaks" documents based on a Patch Code when a "batch" of documents are scanned from a Multi-Function Device (copier/printer/scanner). Typically, Patch Code separator sheets are mass printed and available next to the MFD. When user wants to scan a batch of documents, they would insert the Patch Code separator sheets between the documents, then scan the stack in the MFD. MultiFunction Service then "breaks" or separates the documents based on the patch codes and stores those documents in iSynergy.

DATA EXCHANGE SERVICE

Data Exchange Service allows data to be passed between the iSynergy database and any existing ODBC compliant database within an organization. Data can be pushed into or pulled out of these databases providing a method for automating the indexing process as documents are captured and sent to the iSynergy repository. Data Exchange Service is a Windows service that runs in the background and is executing an XML script. Sold as a server component.

MULTI-INDEX INSERTER

Multi-Index Inserter allows multiple documents with different index values to point to the same image in iSynergy. For example, one company check pays 10 separate invoices. When the check is scanned, Multi Index Inserter accesses the company's accounting database, finds those 10 invoices, creates 10 separate documents in iSynergy indexed by each of the 10 separate invoices information, with all of them pointing back to the scanned image of the check. A search can now be performed on the check number which will result in a hit list containing the invoices paid by that specific check OR search for a specific invoice number with the result set containing a the check. Sold as a server component.

ADIS

Active Directory Integration Service (ADIS) provides automatic synchronization between users and groups within a domain Active Directory and iSynergy. This provides the ability to manage users and groups in one location (Active Directory) rather than manage users and groups in both Microsoft Active Directory and iSynergy.

The iDatix suite of solutions is comprised of a variety of modules each with a specific function and purpose. The following chart provide a very brief summary of the components; subsequent pages include a more detailed, in-depth explanation of each. Because these modules are all owned and developed by iDatix, they are seamlessly integrated with each other, and application aware.

FULL TEXT SERVICE

Full Text Service allows for full text searches across documents stored in iSynergy. Different than searching for documents using index fields, full text service allows keyword search across scanned images, Word documents, Excel spreadsheets, HTML files, text files, and image-over-text PDF files. A full text search may be combined with an indexed search to pinpoint very specific information contained in document.

Brief Overview of the iSynergy Suite Components

CAPTURE	SCANDOX - Unified Solution for Distributed, Efficient and Accurate Data Capture Offering an intuitive workspace environment, ScanDox is a single capture tool that allows easy and efficient document scanning, sorting and indexing tasks prior to submitting to iSynergy. ScanDox provides true internet transport of documents, and full functionality in a disconnected environment with automatic upload to the iSynergy server when an internet connection is available..
	BARCODER - Barcode Sheet Creation BarCoder allows simple creation of barcode separator sheets for automating the document indexing process. BarCoder also allows execution of database look-up to auto-populate index fields greatly reducing data entry and further ensuring accuracy. BarCoder is also ideal for customers who wish to scan using a Multi-Function Device (copier, printer, scanner). Sold per workstation.
	XTRACTOR - iSynergy Recognition Engine Xtractor provides the functionality to read barcodes, perform zonal OCR, and conduct advanced forms processing. By implementing Xtractor to "grab" an index value, and performing database look-ups through Data Exchange Service, iSynergy can greatly reduce manual indexing, and provide an easy to use end-to-end business process solution.
	IDOX ERM - Enterprise Report Management iDox is the ERM (Enterprise Report Management) module (technology formerly referred to as COLD) which provides automatic capture and indexing of PDF print streams generated by core line of business/legacy systems.
	iFORMS - Electronic Forms Our intelligent electronic forms solution, iForms, is easy to create, easy to use and easy to manage. iForms uses your existing web browser and requires no programming to develop and deploy powerful, real-world forms.
	mCapture Capture items remotely and submit them directly to the repository with our mobile app mCapture, available on Android and Apple devices.

STORE	<p>ISYNERGY ENTERPRISE SERVER</p> <p>This is the heart of the iSynergy suite of products. The iSynergy Server is the main user interface for those wanting to search, retrieve, view, fax, print, email or apply annotations to the documents contained in the iSynergy repository. Full Text Service allows for full text searches across documents stored in the repository. Additionally, the iSynergy Server contains the administration interface for user and/or group management as well as application management. Included with iSynergy is a MultiFunction Service which “breaks” or separates the documents based on the patch codes and stores those documents in iSynergy. Additionally, the Data Exchange Service that comes with iSynergy allows data to be passed between the iSynergy database and any existing ODBC compliant database within an organization. Multi-Index Inserter is a plug-in service that works as an extension of Data Exchange Service, allowing creation of a one-to-many index relationship. The Active Directory Integration Service provides automatic synchronization between users and groups within a domain Active Directory and iSynergy.</p>
INTEGRATION	<p>ILINK - Application Linker</p> <p>iLink allows core line of business software to be image enabled. Through placement of a customized “button” on top of any existing line of business software iLink allows users to retrieve and scan images, as well as create barcode separator sheets from within that existing application. Setup is simply point and click; no coding or scripting is required. Link is licensed per workstation.</p>
WORKFLOW	<p>PROGRESSION - Rules-based Workflow</p> <p>Progression is the graphical interface rules-based automated workflow module from iDatix. Ad hoc workflow is native to the iSynergy product, however, Progression introduces a new level of workflow through incorporation of business rules and automated trigger points in the business process. Progression is comprised of three modules; the Progression Server, Progression Designer, and Progression Manager with the server licensed as a module at the server device level and Progression Designer and Progression Manager licensed by user.</p> <p>IRETENTION MANAGER - Document Lifecycle Management</p> <p>As a tool to aid in regulatory compliance, iRetention Manager allows an organization to define retention periods associated with a variety of documents stored within the iSynergy repository. A specific retention period can be associated to an application within iSynergy or varying retention periods can be defined for different document types within an iSynergy application.</p>
TRANSFORM	<p>ANALYTICS - Business Intelligence</p> <p>Monitor, analyze, forecast and ultimately transform your business with the iDatix Analytics solution. iDatix Analytics provides insightful business intelligence to increase visibility into operations, accelerate decision making and unlock the value of your data. Executive, Operational and Performance Dashboards offer the specific information that each member of your team needs to monitor, evaluate and analyze operations. iDatix Analytics provides a high level overview of your processes. Gain a bird’s eye view of your workflows to monitor the overall performance of your organization as a whole.</p>

ScanDox

Internet-based Capture

ScanDox is a unified solution for distributed, efficient and accurate data capture addressing more than simple scanning. Designed to offer great flexibility in capturing documents, ScanDox offers a rich set of features to help accelerate your document capture process:

- Remote and local document capture
- On-the-fly image processing
- External database linking
- Endorsing/imprinting
- Advanced profile management
- Drag-and-drop
- TWAIN compliant
- Email and print
- Web-based deployment
- Work online or offline
- Scheduled transfers
- Black, white, grayscale, color



ScanDox offers an intuitive workspace that allows users to easily and efficiently perform document scanning, sorting and indexing tasks prior to submitting to iSynergy. Additionally, ScanDox offers pre-configuration of scanners and document processing settings at the central location. The end user needs only to select a profile, connect a scanner and begin scanning. The settings associated with the connected scanner are automatically selected by ScanDox.

BarCoder

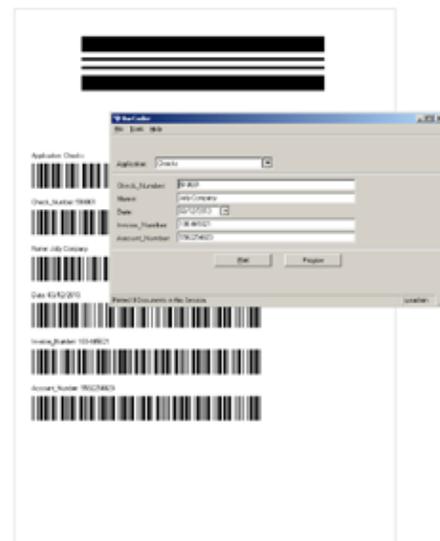
Automatic Cover / Separator Sheet Generation

BarCoder allows users of iSynergy to easily produce bar-coded document separator pages to be used during the scanning process to automate the indexing of documents into iSynergy.

BarCoder also allows the customer to execute a database lookup into an existing database or third-party application to auto-populate index fields. This greatly reduces the amount of data entry required during the capture process. Additionally, BarCoder is ideal for customers who wish to scan using Multi-Function Devices (copier, printer, scanner).

BarCoder is completely integrated into iSynergy and requires no programming or scripting to use. New

iSynergy applications are automatically configured. BarCoder can also be integrated into third party applications through an API interface to allow for a completely automated production.

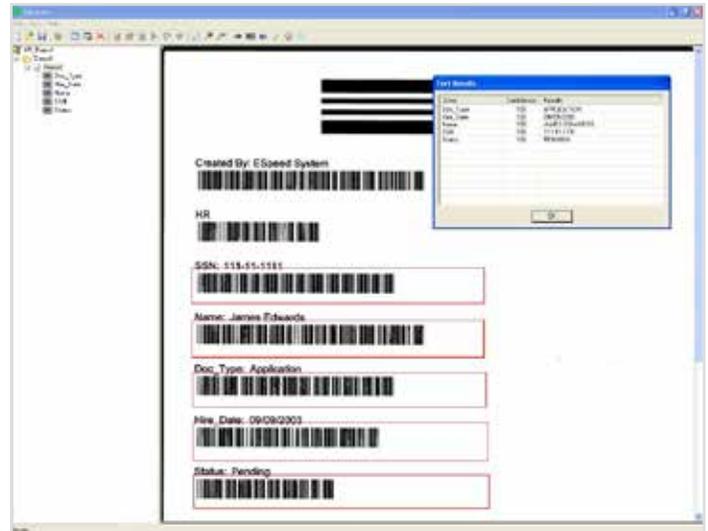


Xtractor Automated Indexing

Xtractor is the iSynergy recognition module allows customers to read barcodes, perform zonal OCR, and conduct advanced forms processing. By implementing these technologies, utilizing Xtractor, and performing database look-ups, the amount of manual indexing required by the customer is greatly reduced.

Xtractor provides barcode and character recognition completely integrated with iSynergy to automate the indexing process. Xtractor can work with document separator and indexing sheets produced within iSynergy's BarCoder program or existing documents using customized templates.

Xtractor has been optimized for processing Mortgage documents and has the built-in ability to convert bar-coded document numbers produced by document prep

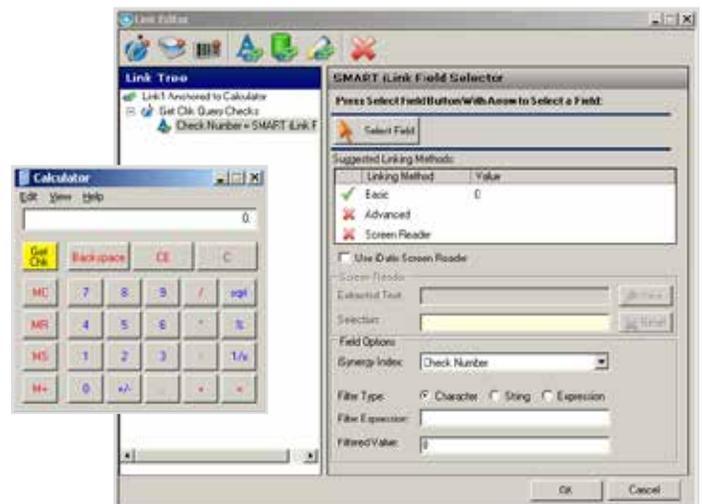


companies to the actual document type text used by processors. Xtractor also has sub-page processing that allows it to search for specific content or formats to index documents or extract data from any page of a multi-page document.

iLink Image-Enable any Windows Application

iLink allows the customer to put a customized "button" on top of any existing application being used in the organization. The button can be set up to retrieve images, scan images, or create a barcode separator sheet from within an existing third party application. No programming or scripting involved, just point-and-click setup.

iLink enables organizations to integrate their core systems with iSynergy without any costly programming. iLink's point-and-click interfaces provide a simple and intuitive way to design and attach buttons to any Windows application within minutes. With a single click of a button, users can query for documents stored in iSynergy, scan and automatically index documents or create a barcode coversheet.



iRetention Manager Document Life Cycle Management

iRetention Manager will allow an organization to define retention periods associated with a variety of documents stored within the iSynergy repository. Defining retention periods for documents is important in order to properly manage a documents lifecycle—from creation to destruction—in compliance with internal company guidelines or, more importantly, in compliance with standard federal and/or state regulatory compliance retention policies.

Using iRetention Manager, a specific retention period can be associated to an application within iSynergy or varying retention periods can be defined for different document

types within an iSynergy application. In addition, iRetention Manager will allow an organization to define a “trigger date” for a document which will officially begin applying the retention period policy based on that “trigger date”.

When a purge report is executed within iRetention Manager, a report will be created indicating the number of documents, based on application or document type, that are eligible for destruction based on that applications or that document types retention policy. The user then has the ability to purge all of the documents or to individually select the document types to purge from the iSynergy repository.

Retention Profile

Profile Name:

Application:

Trigger Date

Index:

Document Retention

Number of Periods:

Period:

Document Type

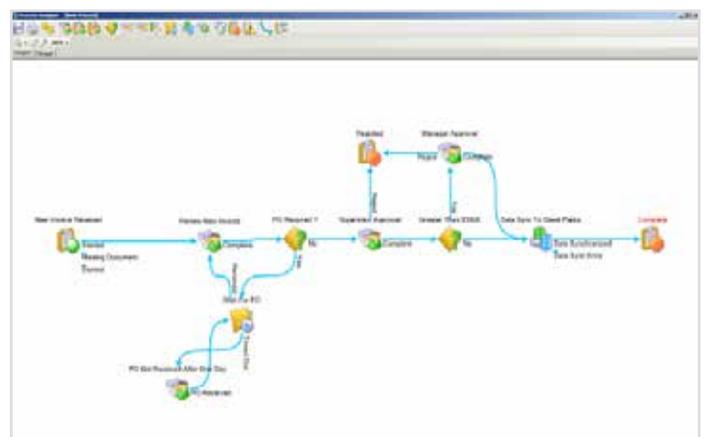
Index:

Value:

Progression Automated Workflow Solution

Progression, a key component of the iSynergy software, is a powerful workflow automation solution that offers robust functionality and visual process modeling. It will increase the visibility into your business processes and empower your organization to increase productivity and accountability while reducing bottlenecks.

Progression allows you to easily convert any business process into a browser-based, web-enabled application without programming or development. With our easy-to-use graphical interface, you can define the



functionality of a process simply by typing instructions and connecting the workflow.

Automated Workflow Capabilities — Workflow automation is the automatic routing of items based on pre-determined business rules. As the workflow items reach their destination, the responsible user(s) are alerted and given the proper information to complete their task. Once completed, the system automatically sends the information through to the next checkpoint in the workflow, all the way through to completion. This is key, since reducing the manual requirements within your workflow will increase process predictability and decrease errors.

Prioritized Queues — Prioritized queues consist of all the tasks each employee is subscribed or assigned to, in order of their particular priorities. These queues may have one or many users with access to them, depending on the number of people appointed to each particular task. As work items are completed or priorities change, the dynamic queue will adapt in real time, allowing for your workflow to become a flexible and intuitive part of the business.

Mobile Support — The workflow within Progression can be viewed and tasks can be completed remotely, from any mobile device. Capture items remotely and submit them directly into your workflow with our app mCapture, available on Android and Apple devices.

Parallel Processes — Step by step sequential processes are enabled, which is a typical feature in workflow automation. However, Progression takes this a step further with powerful parallel processing, which allows for multiple tasks to occur simultaneously within your workflow. These concurrent processes eliminate redundancy and wait times.

No Coding or Programming — Progression allows for a seamless correlation of data when creating your business workflow processes and integrating them with other key line of business systems through its easy to use GUI based workflow creation screen. Designing and managing the workflow is configurable without complex scripting, coding or programming.

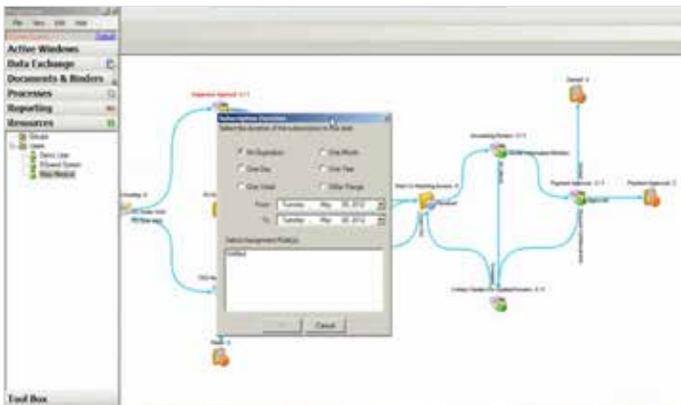
Reporting & Monitoring — Reporting and performance metrics are a powerful feature of Progression. From viewing the number of assignments in a process by status, to the number of workers allocated to a particular task, reporting and monitoring enable real-time decision making and add more value to timely business decisions.

Increased Accountability & Improved Audit Trails — Workflow creates a clear picture of your organizational processes that are driving the business. A comprehensive audit trail of all actions will be available, increasing your users accountability.



PROGRESSION DESIGNER

With a simple point and click interface, Progression Designer draws the processes and defines the rules which are then applied to documents stored in iSynergy. Progression Designer provides a graphical interface for defining processes with associated tasks. Tasks contain defined Actions for the user as well as a description of the task and instructions or steps for completing a task. Tasks can be ordered and dependent on the completion of other tasks with the ability to define states that can automatically move task items to the next step of the business process.



Any number of processes can be defined, and each process can have a unique start event derived from a specific state of a document contained in the iSynergy Solution or from an external database event. Progression also provides tools for data exchange and synchronization as well as the ability to launch external programs and processes.

PROGRESSION MANAGER

As an integrated part of Progression, the Manager module allows monitoring of work and tasks as the processes occur. Managers can see the work to be done, who is working and productivity statistics in real-time. Named resources by group or individuals can be dynamically assigned to tasks for load balancing or re-prioritizing work.

PROGRESSION LITE

Progression Lite offers a cost-effective and easy-to-deploy framework for implementing workflow automation in your organization.

Progression Lite uses the most powerful features of task automation, enabling you to automate your workforce and the activities that drive them on a daily basis. By bringing your content and work tasks together, information is now available when and where you need it and your workforce is empowered to take immediate action.

Work moves through the organization without unnecessary administrative burden so tasks are completed in a fraction of the time it takes manually. The knowledge and expertise of your workforce is built into the automated processes, providing everyone in the organization with the know-how needed to do their job quickly and effectively. The resulting process visibility and business intelligence allows for better-informed business decisions and the ability to rapidly resolve process and resource issues.

iForms

Electronic Forms Solution

As organizations increasingly rely on the web as the primary means of interaction with customers, they are emphasizing the capture and management of information electronically. Easy-to-use, business capable electronic forms and workflows are a critical aspect of this interaction.

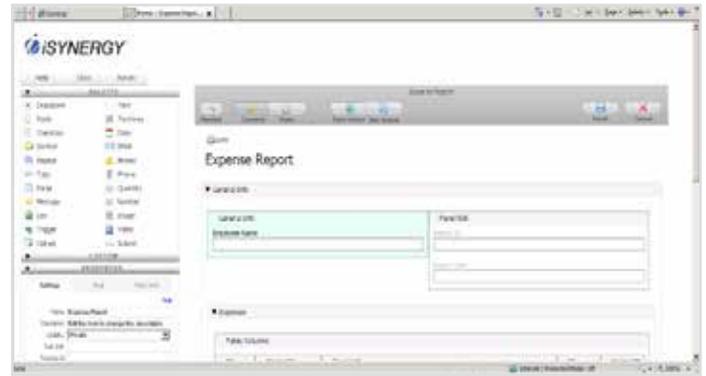
Our intelligent forms solution, iForms, makes electronic forms easy to create, easy to use and easy to manage. Using iForms, anyone can offer a rich experience online with dynamic forms, while maintaining existing business requirements. Best of all, iForms uses your existing web browser and requires no programming to develop and deploy powerful, real-world forms.

Easy to Use

- Graphical, 100% browser-based designer
- Quickly create forms using an intuitive, drag-and drop interface
- Use your existing web browser; there's nothing to install and no proprietary "filler" applications
- Wide variety of pre-packaged controls to collect information such as Date, Phone and Email

Built-in Business Capabilities

- Group and arrange controls in a variety of ways – collapsible sections, tabs, multiple columns
- Provide dynamic behavior via business rules
- Easily handle repeating items such as multiple addresses
- Create re-usable control blocks for efficiency
- Allow users to upload and submit attachments utilizing an online form
- Pre-fill sections of forms based on prior submitted data
- CSS standards to create a custom look and feel



Manage Your Data

- Connect to your database; forms can get initial data as well as update the database
- Easily integrate with line of business systems/ databases
- Full XML support simplifies integration with back end systems

Mobile Support

- Capture information directly from your mobile device and connect it to your iForm
- Submit form data into your document management repository from any mobile device

Approve, Review & Track

- Automatically route, track and manage approvals processes
- Digital signatures ensure data integrity
- Built-in audit trail for tracking submissions

Enhanced Security

- View/submit forms over a secure 128-bit encrypted connection
- Multi-level security to control access to forms and submissions

Analytics

The Power of Business Intelligence

iDatix Analytics provides insightful business intelligence to increase visibility into operations, accelerate decision making and unlock the value of your data. Designed to be intuitive and easy to use, our business intelligence (BI) solution makes the creation of complex what-if scenarios and in-depth analyses simpler and more effective. Monitor and analyze your performance right from your desktop, or while on the go with mobile BI; you can access your business intelligence any where, at any time, from any device.

The combination of workflow with business intelligence enables organizations to incorporate their unstructured content, harness their structured data, link their workflows and ultimately monitor, analyze and optimize their operations. The performance metrics, reports and dashboards that are available for a high-level business overview can also be viewed for specific processes. Gain new insight into your business with the ability to evaluate your workflows and performance side by side.

- Integration with your core business systems
- Executive, operational and performance dashboards
- Gain complete visibility and monitor overall performance of your organization
- Improve forecasting with advanced "What If" simulations
- Real-time alerts and notifications from within Analytics, on your mobile device or right in your inbox

