Synergy Documents Integration

SynergyDocsIntegration.dnax
DNAApp Id 14ccbcab-a6db-414a-950d-fdc19fc2b649

Overview:
Synergy Documents Integration provides convenient access to documents and checks stored within an instance of Jack Henry's Synergy product. Searching within Synergy typically requires switching windows and navigating through a somewhat cumbersome search process. This integration provides quick access from the Relationship Profile and relevant results based on the active person or organization.

Key Benefits:
Synergy Documents Integration provides a shortcut for quickly and conveniently accessing documents relevant to a specific Relationship Profile within DNA.

It provides:

- Searching based on cabinet and/or document type
- Searching checks based on transaction amount, process date, or check number
- Opening multiple items simultaneously by launching the associated program based on file type (PDF, HTML, TXT, etc.)
- Printing multiple items simultaneously (PDF and Check Images only)

Processing:

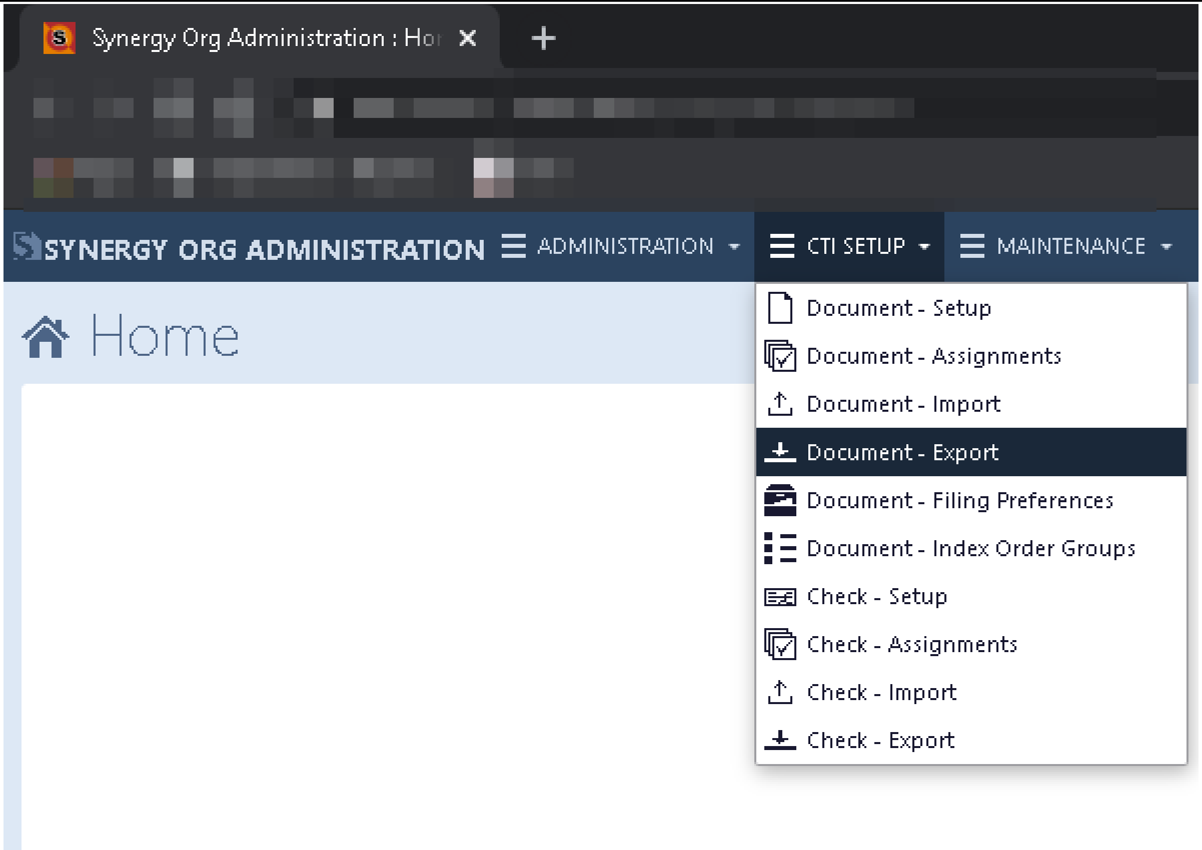
<u>Synergy Doc DB Config:</u>

The Synergy DocDB Loader requires valid Synergy Documents/Checks configuration XML files. These are obtained from the CTI Setup menu within Synergy Org Administration. The Synergy export file format is quite complex and beyond the scope of this documentation. Please consult the Synergy documentation for more detail. Validation is performed on each file prior to loading.

Cabinet and type information is exported from Synergy and stored in a custom DNA table (OSIEXTN.SYNDOCDB). Perform the following steps at installation and whenever cabinet and/or type configurations are updated in Synergy.

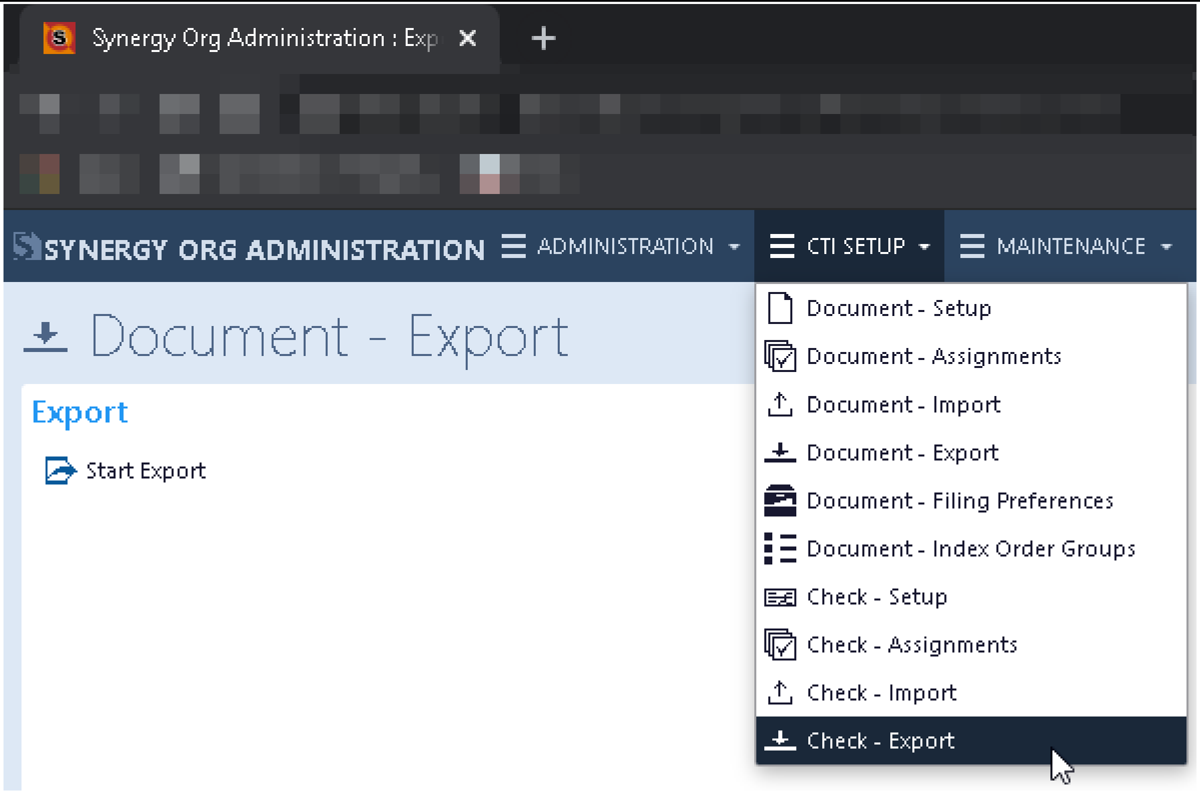
Log into Synergy Org Administration. Navigate to CTI Setup > Document – Export.

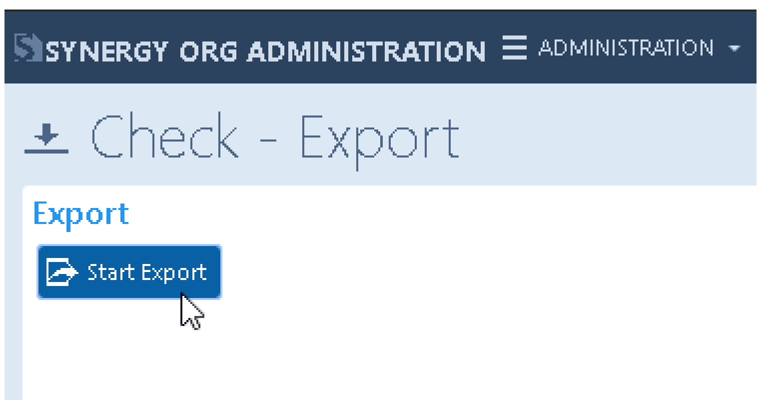
Click Start Export. This will download an XML file. Rename the file to Documents.xml.



Navigate to CTI Setup > Check – Export.

Click Start Export. This will download an XML file. Rename the file to Checks.xml.

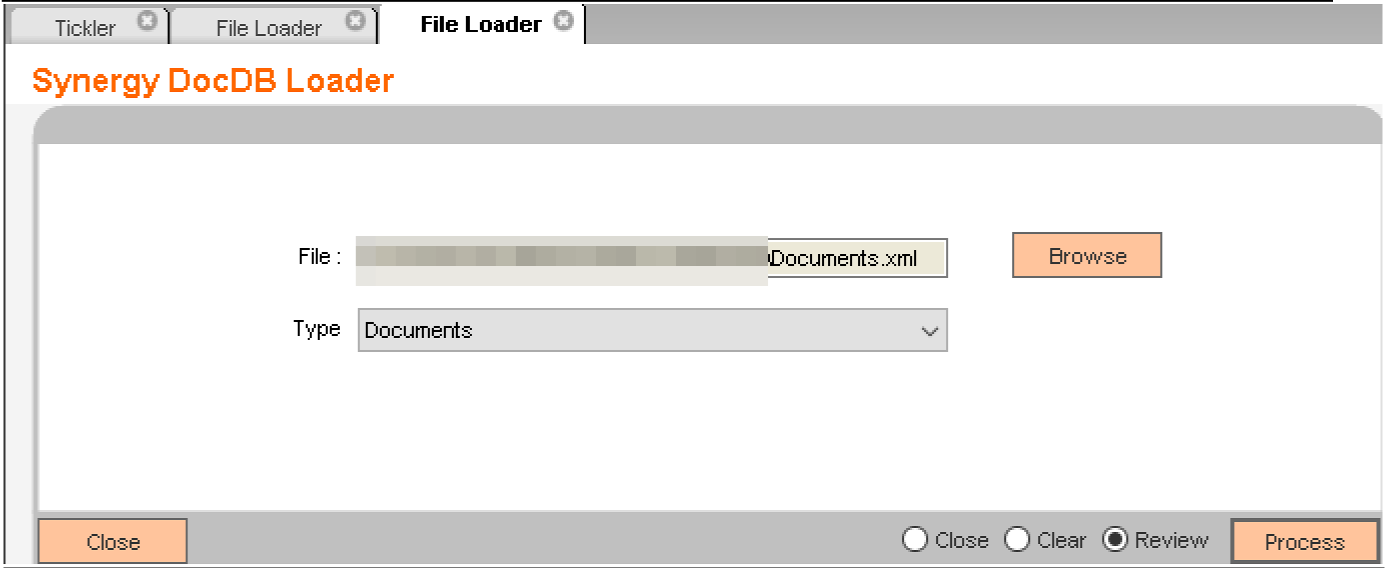


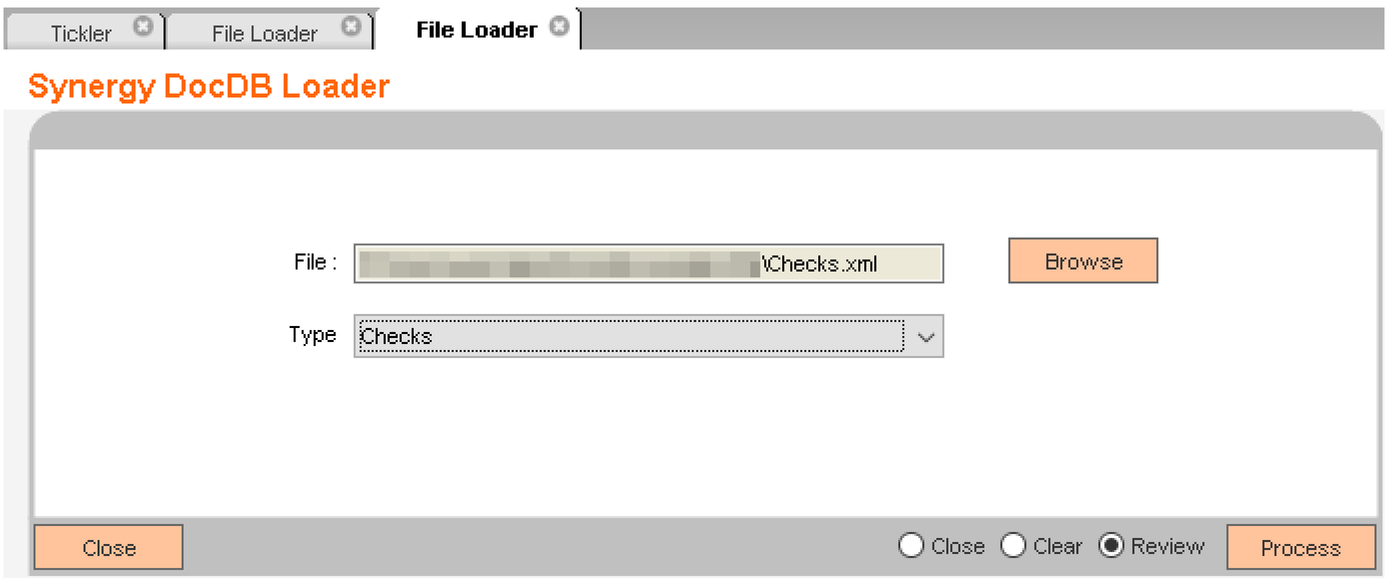


Navigate to the Batch Module > Load and Manage Files > Synergy DocDB Loader.

Browse to the Documents.xml file and ensure the “Type” is set to Documents. Click Process.

After getting confirmation of records loaded, repeat the process with the Checks.xml document. Be sure to change the Type to Checks.



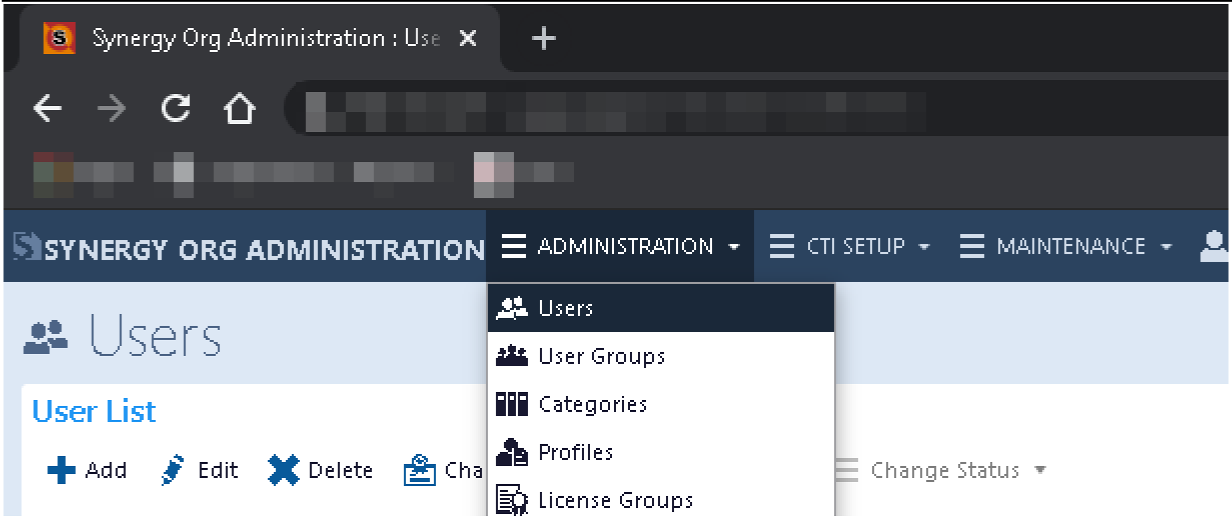


<u>Synergy Service Account:</u>

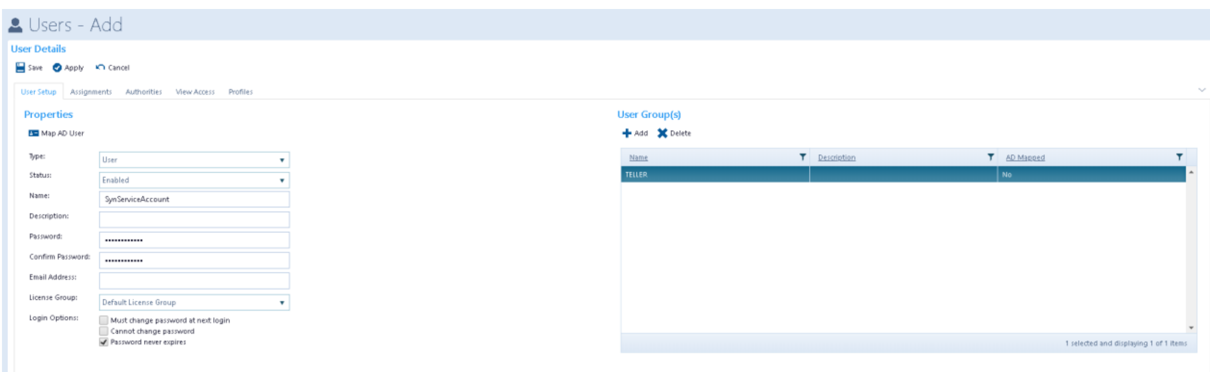
The Synergy Documents Integration app requires a Synergy user account to search and retrieve documents. Said user account should have access to any cabinets that will be included in search results. Perform the following steps to create and configure the account in Synergy and DNA:

Log into Synergy Org Administration.

Navigate to Administration > Users > Add

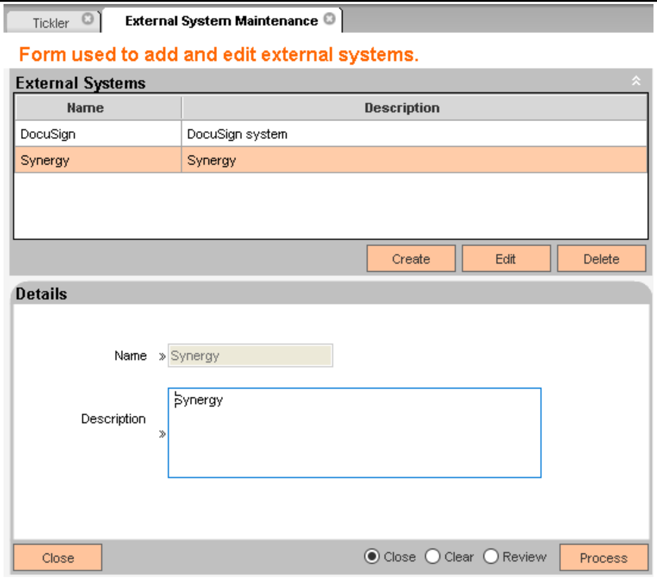


Provide a Username and Password. Set password to never expire since this is a service account. Add appropriate User Group.



Log back into DNA and create an External System called “Synergy” within the SAF module.

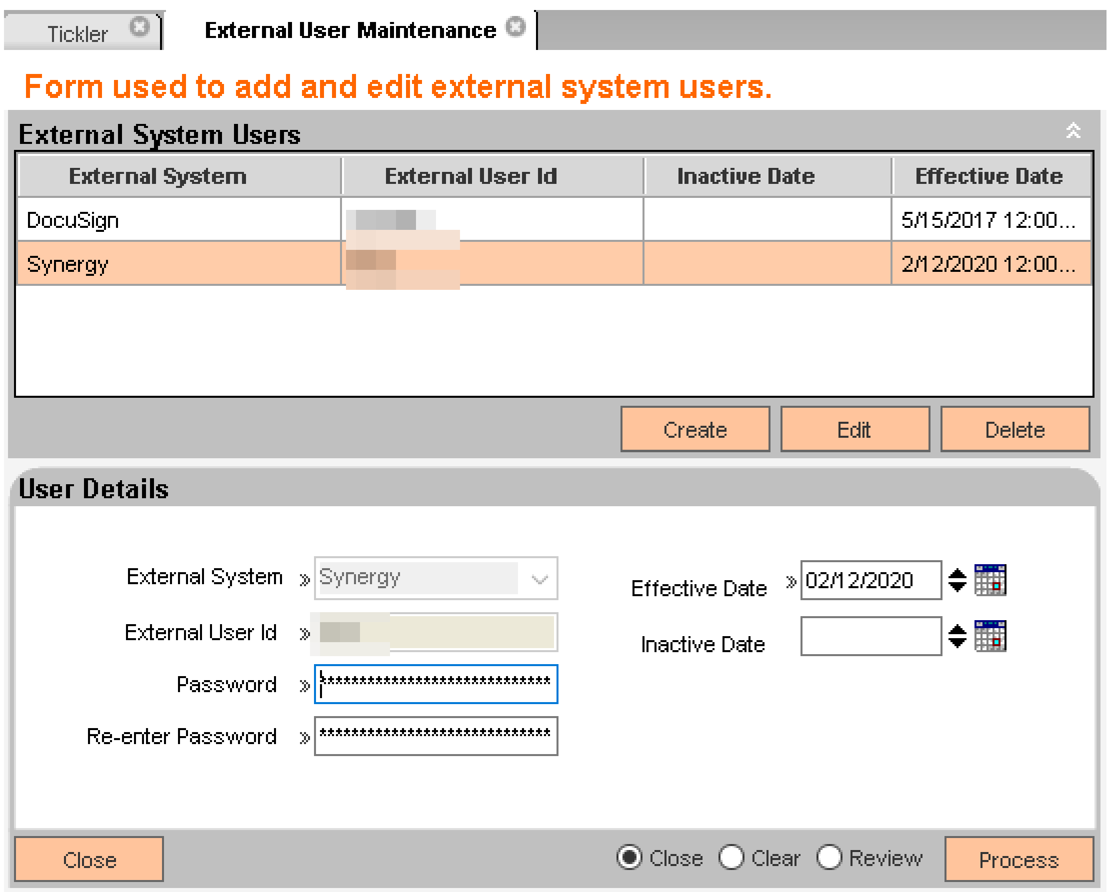
SAF > External System > Maintenance



Create an External System User within the SAF module.

SAF > External System > Users

The username/password must match the designated Synergy service account created earlier. The username must also match the value in the SYNU variable defined below.

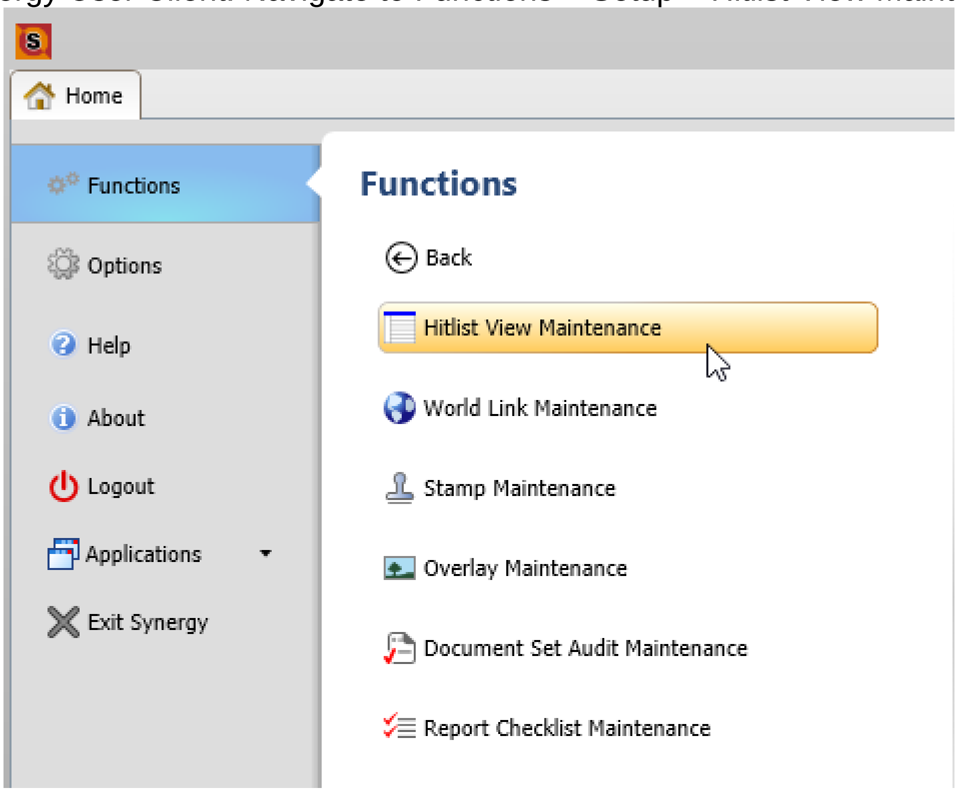


Synergy Hitlist View:

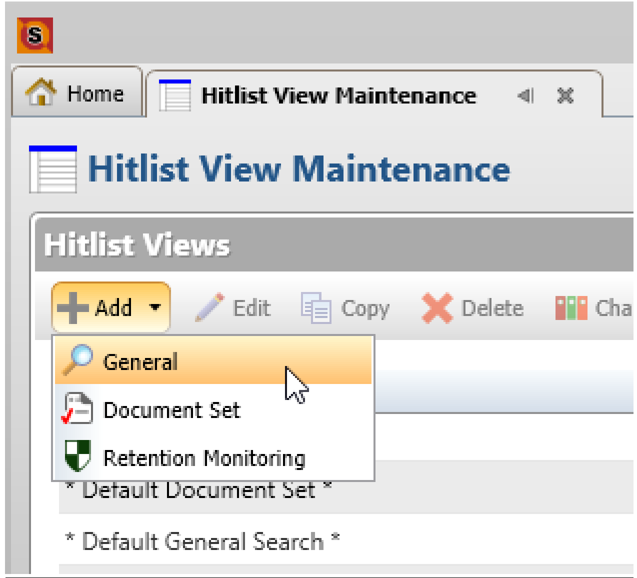
Synergy Documents Integration also requires a specific Hitlist View in order to properly parse index information related to retrieved documents and checks.

Follow these steps to create it:

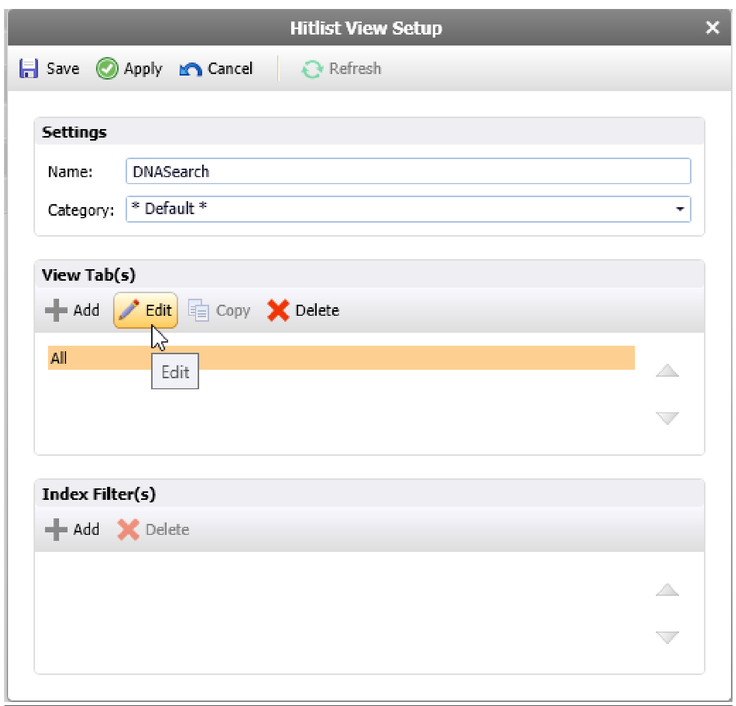
Login into Synergy User Client. Navigate to Functions > Setup > Hitlist View Maintenance



Click Add > General.



Enter “DNASearch” for the Name. Click “Edit” under View Tab(s).



Use the “Add” button to effectively mirror the columns below. NOTE: The names of these indexes will correspond to the FI’s unique index names, not necessarily those listed below. The indexes selected *must* match the index names specified in the variables listed later in this guide.

Also, the DATE (item 14) and TRX DATE (item 16) indexes listed below are exempt from this rule. These two indexes can be set to anything appropriate (date). However, the order is absolutely critical.

From this point, click Next, Finish, and Save to complete the task.

Columns

Add Delete

Name	Column Type	Always Visible
Name/Text	Information Column	☐
Institution	Information Column	☐
Application/Cabinet	Information Column	☐
Report/Type	Information Column	☐
Creation Date	Information Column	☐
Report Date	Information Column	☐
ACCOUNT NUMBER	Index	☐
CHECK NUMBER	Index	☐
MEMBER NAME	Index	☐
MEMBER NUMBER	Index	☐
LOAN NUMBER	Index	☐
DOCUMENTNAME	Index	☐
DOCUMENT TYPE	Index	☐
DATE	Index	☐
SOCIAL SECURITY NUMBER	Index	☐
TRX DATE	Index	☐
PROCESS DATE	Index	☐
AMOUNT	Index	☐
Modified Date	Information Column	☐

Variables:

Category Code	Description
SYNI	Synergy Documents Integration

Type Code	Description
SYND	Synergy Documents

Variable	Code	Description	Data Type	Default Value
Synergy Documents Username	SYNU	Username for the Synergy service account.	STR	Username
Synergy Documents Cabs	SYCA	Pipe delimited list of Cabinets to include on the Documents screen.	STR	SIGNATURE CARDS
Synergy Statements Cabs	SYSC	Pipe delimited list of Cabinets to include on the Statements screen.	STR	STMT
Synergy Check Cabs	SYCC	Pipe delimited list of Cabinets to include on the Checks screen.	STR	CHECKS
Synergy Account Number Index	SYAN	Name of relevant Account Number index in Synergy.	STR	ACCOUNT NUMBER
Synergy Member Number Index	SYMN	Name of relevant Member Number index in Synergy.	STR	MEMBER NUMBER
Synergy Member Name Index	SMNA	Name of relevant Member Name index in Synergy.	STR	MEMBER NAME
Synergy SSN Index	SYSS	Name of relevant Social Security Number index in Synergy.	STR	SOCIAL SECURITY NUMBER
Synergy Check Amount Index	SCKA	Name of relevant check amount index in Synergy.	STR	AMOUNT
Synergy Check Number Index	SCKN	Name of relevant check number index in Synergy.	STR	CHECK NUMBER
Synergy Check Proc Date Index	SCPD	Name of relevant check process date index in Synergy.	STR	PROCESS DATE

Synergy STMT Minor List	SYSA	Pipe delimited list of minors to filter by when populating account list on Statements screen.	STR	SHRE|BSAV
Synergy API URL	SYAU	Endpoint URL for the Synergy SIMNET API Service	STR	https://localhost/simnet/simnet_session.asmx

Authorizations:

The Documents, Checks, and Statements screens require the Relationship Profile authorization item (RS).
The Synergy Doc DB Loader screen requires the File Loader authorization item (FLOD).

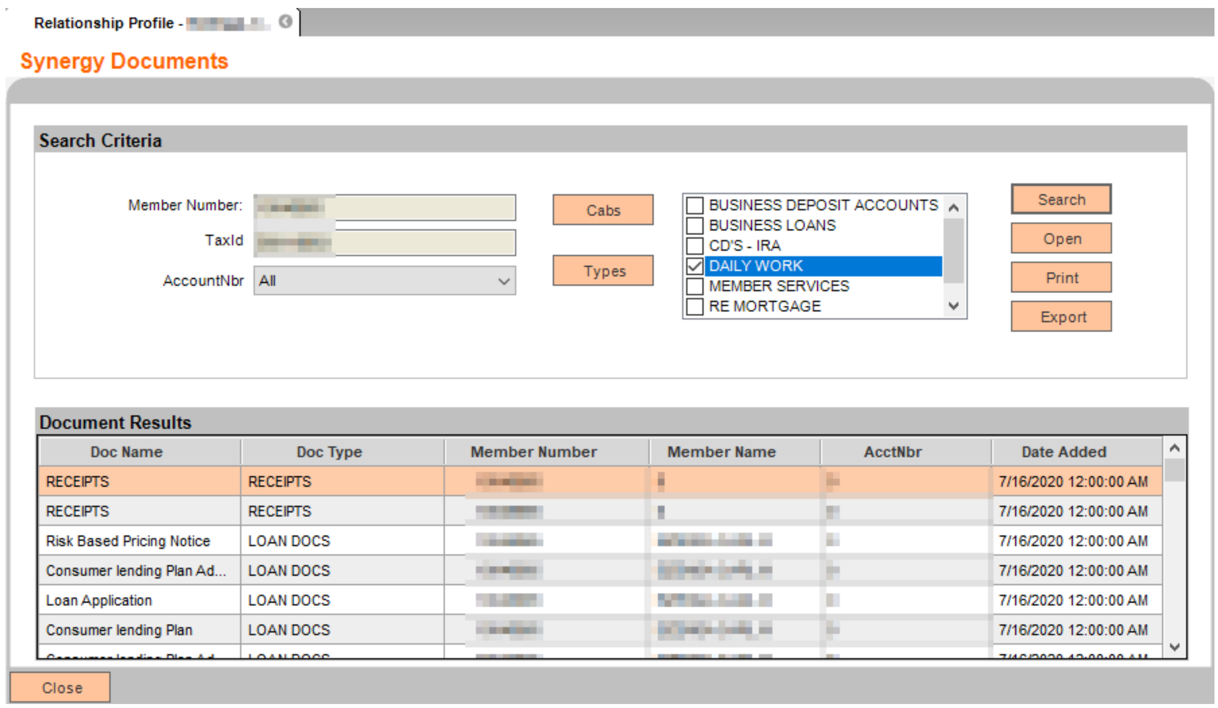
Screens:

- Documents: Provides access to general documents based on FI-defined cabinet list.
- Checks: Provides access to checks based on FI-defined cabinet list.
- Statements: Provides access to statements only based on FI-defined cabinet list.
- Synergy DocDB Loader: Allows loading Synergy configuration XML files. Required at initial installation and whenever cabinet/type changes are made in Synergy.

Navigation:

Relationships > Quick Inquiries > Relationship Profile > More > Synergy > Synergy Documents
Relationships > Quick Inquiries > Relationship Profile > More > Synergy > Synergy Checks
Relationships > Quick Inquiries > Relationship Profile > More > Synergy > Synergy Statements
Batch > Load and Manage Files > Load Synergy Doc DB

Screen Appearance:

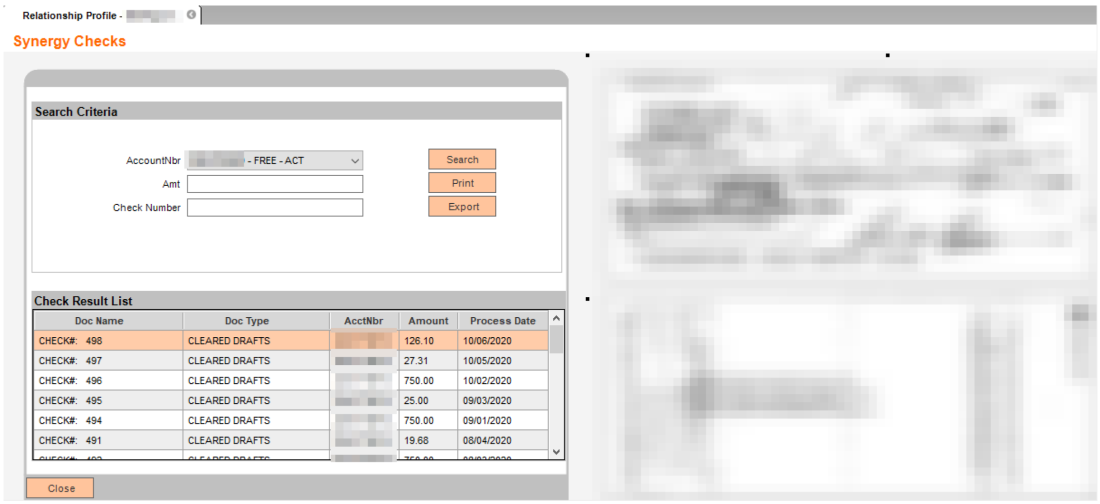


Field Listing (Documents Screen):

Field	Description
	Search Criteria
Member Number	Member Number based on active person/org in Relationship Profile.
TaxId	TaxId of active person/org in Relationship Profile.
AcctNbr	List of owned accounts for the active person/org. All selected by default.
Cabs	Shows a list of available Synergy cabinets to choose from.
Types	Show a list of available Synergy types to choose from. Filtered based on selections in Cabs field.
Search Button	Searches based on specified criteria.
Open Button	Documents/Statements screens only. Opens selected items in appropriate applications based on Windows defaults.
Print Button	Prints selected PDF items or Check items. When called from the Documents or Statements screens, it prints to the default system printer. When called from the Checks screen, a printer selection prompt is shown.
Export Button	Export selected PDF items or Check items. Prompts for a destination folder.
	Document Results
Doc Name	Synergy built-in field for Document Name
Doc Type	Synergy document type
Member Number	Index value corresponding to member number. Configured via variable below.
Member Name	Index value corresponding to member name. Configured via variable below.

AcctNbr	Index value corresponding to account number. Configured via variable below.
Date Added	Picked from several potential values specified in the Synergy Hitlist View. Defaults to Synergy “Time Created” if none of the relevant date indexes have values.

Screen Appearance:

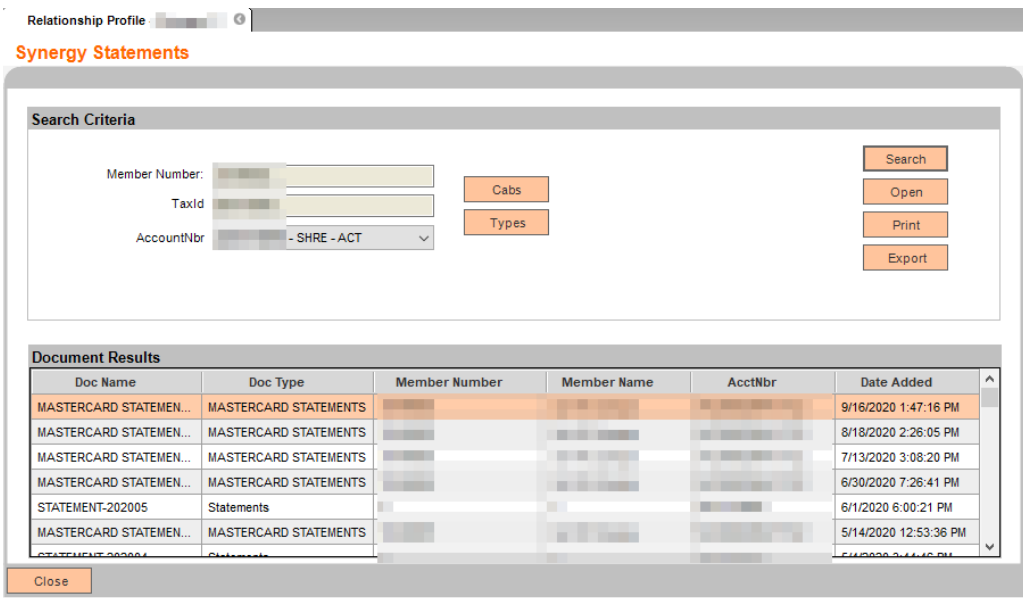


Field Listing (Checks Screen):

Field	Description
	Search Criteria
Member Number	Member Number based on active person/org in Relationship Profile.
TaxId	TaxId of active person/org in Relationship Profile.
AcctNbr	List of owned accounts for the active person/org. All selected by default.
Amt	Checks screen only. Specify check amount to search.
Check Number	Checks screen only. Specify check number to search.
Cabs	Shows a list of available Synergy cabinets to choose from.
Types	Show a list of available Synergy types to choose from. Filtered based on selections in Cabs field.
Search Button	Searches based on specified criteria.
Open Button	Documents/Statements screens only. Opens selected items in appropriate applications based on Windows defaults.
Print Button	Prints selected PDF items or Check items. When called from the Documents or Statements screens, it prints to the default system printer. When called from the Checks screen, a printer selection prompt is shown.
Export Button	Export selected PDF items or Check items. Prompts for a destination folder.
	Check Result List
Doc Name	Synergy built-in field for Document Name
Doc Type	Synergy document type
AcctNbr	Index value corresponding to account number. Configured via variable below.

Amount	Check screen only. Amount of check transaction.
Process Date	Check screen only. Process Date of check transaction.

Screen Appearance:

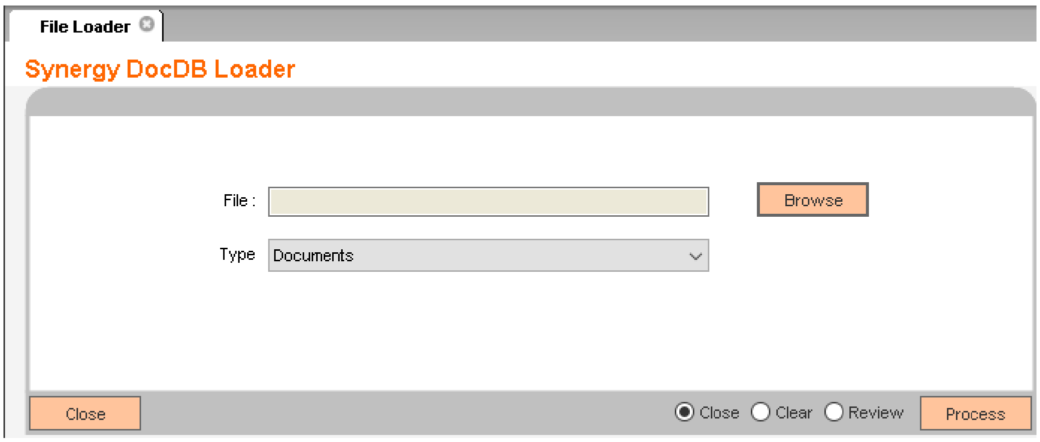


Field Listing (Statements Screen):

Field	Description
Search Criteria	
Member Number	Member Number based on active person/org in Relationship Profile.
TaxId	TaxId of active person/org in Relationship Profile.
AcctNbr	List of owned accounts for the active person/org. All selected by default.
Cabs	Shows a list of available Synergy cabinets to choose from.
Types	Show a list of available Synergy types to choose from. Filtered based on selections in Cabs field.
Search Button	Searches based on specified criteria.
Open Button	Documents/Statements screens only. Opens selected items in appropriate applications based on Windows defaults.
Print Button	Prints selected PDF items or Check items. When called from the Documents or Statements screens, it prints to the default system printer. When called from the Checks screen, a printer selection prompt is shown.
Export Button	Export selected PDF items or Check items. Prompts for a destination folder.
Document Results	
Doc Name	Synergy built-in field for Document Name
Doc Type	Synergy document type
Member Number	Index value corresponding to member number. Configured via variable below.
Member Name	Index value corresponding to member name. Configured via variable below.

AcctNbr	Index value corresponding to account number. Configured via variable below.
Date Added	Picked from several potential values specified in the Synergy Hitlist View. Defaults to Synergy “Time Created” if none of the relevant date indexes have values.

Screen Appearance:



Field Listing (Synergy DocDB Loader Screen):

Field	Description
DocDB Loader	
File	Path of file to load.
Browse Button	Browse to file.
Type	Type of Synergy data to load. Document or Check.

Additional Requirements:

- Fiserv DNA 4.4 or higher
- .NET Framework 4.5.2
- Synergy 2017 or higher

Licensing Considerations

Synergy Documents Integration requires a Synergy client license for each operation (search or retrieval). An error will be returned and displayed to the user if no such license is available.

Check Search Limitation

If the user doesn’t specify a check number or check amount, the search will only return checks from the prior year (with a maximum count of 500). This is caused by a known bug in the Synergy API and will be resolved in a future release.

Configuration Checklist:

Item	Test Environment	Production Environment
Export Synergy Document and Check Configuration XML files from Synergy Org Administration		
Import Synergy Document and Check Configuration XML files into DNA via the Synergy DocDB Loader Screen		
Create and configure Synergy user account		
Create an appropriate Synergy Hitlist View		
Configure or verify remaining variables		
Authorizations		

Oracle Packages:
OSIEXTN.PACK_SYNINTEGRATIONDOCSDB

Oracle Tables:
OSIEXTN.SYNDOCDB

Revisions

Date	App Version #	Change
04/2020	1.0.0.1	Initial release.