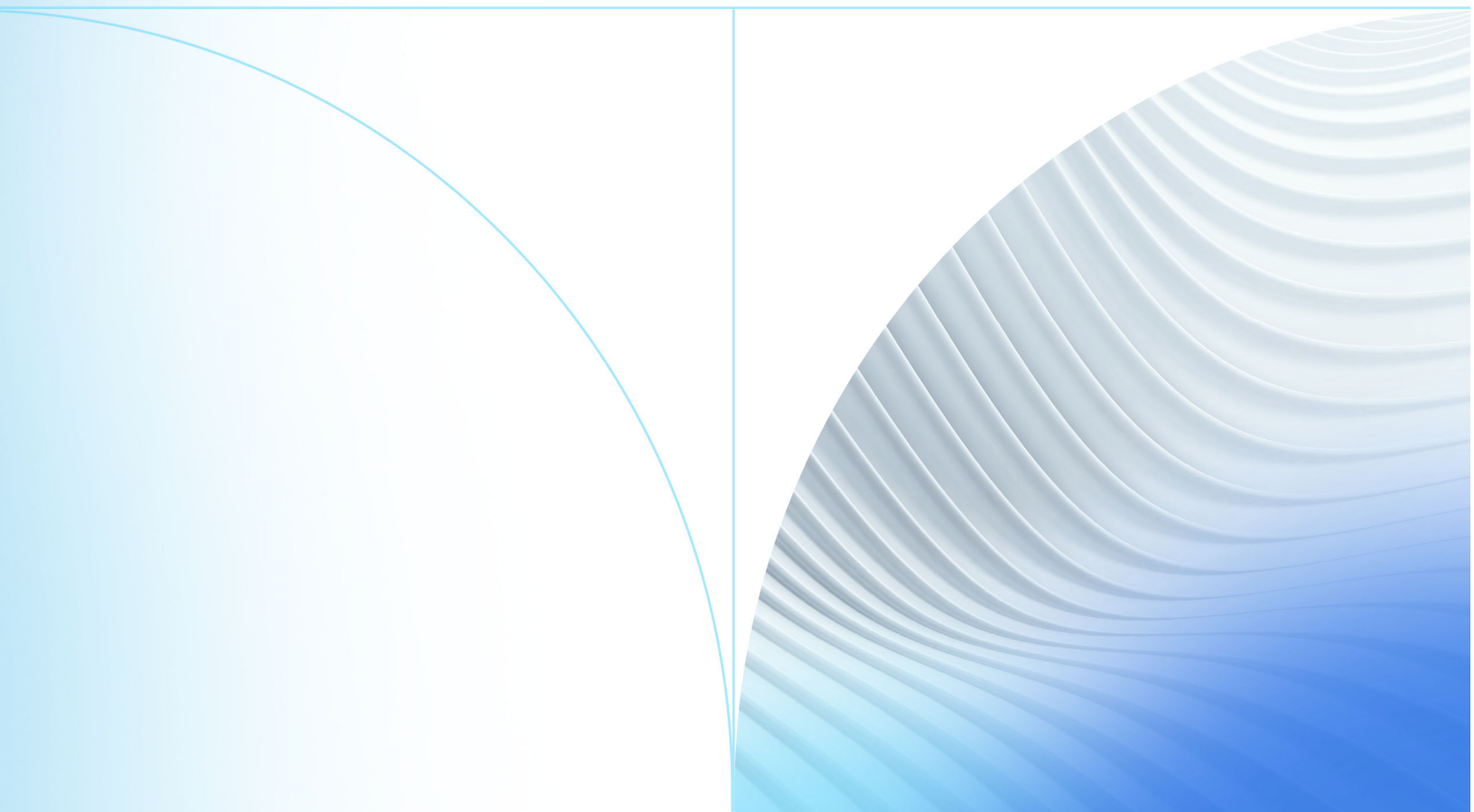




Imaging Solutions
Synergy Enterprise Content
Management™

Release 2025.1

Synergy as a Provider
jXchange™ Service Gateway
05/30/2025



© 1999–2025 Jack Henry & Associates, Inc. All rights reserved.

No part of this publication or any materials authored by Jack Henry & Associates, Inc. (including, but not limited to its marketing materials, printed materials, website content, customer communications, graphic art, and software) may be copied, reproduced, stored in a retrieval system, displayed, distributed or transmitted in any form or any means whatsoever (electronic, mechanical, or otherwise), including by copying or recording for any purpose, without the prior written permission of Jack Henry & Associates, Inc. The unauthorized copying, display, or use of any part of this publication or any Jack Henry authored content for any purpose other than your own personal use is a violation of United States copyright laws.

Information in this document is subject to change without notice. Dates contained in this document are provided as estimates only and can be changed at any time at the sole discretion of Jack Henry & Associates, Inc.

Printed in the United States of America.

Any unauthorized use of Jack Henry & Associates, Inc.'s, trademarks and service marks is strictly prohibited. A list of registered and unregistered marks owned or licensed by Jack Henry & Associates, Inc. is located at:

<https://www.jackhenry.com/intellectual-property>.

Various other trademarks and service marks used or referenced in this document are the property of their respective owners.

Synergy as a Provider jXchange Service Gateway.....	5
Overall Expectations.....	6
Request.....	6
Response.....	7
Vocabulary Mapping and Open Vocabulary Mapping	8
UsrOperInq.....	8
UsrOperInq Request.....	9
UsrOperInq Response.....	10
UsrOperInq Example.....	11
SvcDictSrch – DocImgAdd.....	12
SvcDictSrch – DocImgAdd Request.....	13
SvcDictSrch – DocImgAdd Response.....	14
Example 1 – Retrieving Cabinets, Institutions, and Indexes for a Specific Type.....	16
Example 2 – Retrieving Cabinets, Institutions, and Indexes for all Types.....	18
Example 3 – Retrieving Smart Index Required Lookup Values.....	19
SvcDictSrch – DocImgAdd Response.....	19
DocImgAdd.....	20
DocImgAdd Request.....	21
DocImgAdd Response.....	25
Example 1 – Without Smart Index Lookup Values.....	27
Example 2 – With Smart Index Lookup Values.....	29
SvcDictSrch – DocImgSrch.....	31
SvcDictSrch – DocImgSrch Request.....	31
SvcDictSrch – DocImgSrch Response.....	33
SvcDict: DocImgSrch Example 1 (With FilterCode).....	34
SvcDict: DocImgSrch Example 2 (Without FilterCode).....	35
DocImgSrch.....	36
Synergy Image Retrieval.....	37
DocImgSrch Request.....	37
DocImgSrch Response.....	43
DocImgSrch Example 1: Predefined Search.....	47
DocImgSrch Example 2: Predefined Search (Cabinet Specified).....	50
DocImgSrch Example 3: UniqueIndex without Image Retrieval.....	51
DocImgSrch Example 4: UniqueIndex with Retrieval.....	52
DocImgSrch Example 5: Predefined Search.....	54
DocImgMod.....	57
DocImgMod Request.....	58
DocImgMod Response.....	61
DocImgMod Example.....	62

DocImgCrossIdxAdd.....	63
DocImgCrossIdxAdd Request.....	65
DocImgCrossIdxAdd Response.....	65
DocImgCrossIdxRsInfo.....	66
DocImgCrossIdxRsArray Example Request.....	66
DocImgCrossIdxRsArray Example Response.....	67
DocImgAttachInq.....	68
DocImgAttachInq Request.....	69
DocImgAttachInq Response.....	70
DocImgAttachInq Examples.....	71
Sample JSON Tabular Data.....	71
Fault or Error Responses.....	72
11001: Cannot Process Request Due to Missing Required Data For.....	72
11002: This User Does Not Have Access to Synergy.....	72
11004: An Internal Application Server Error Has Occurred.....	73
11005: Cannot Perform Action Due to Invalid.....	73
11006: This User Cannot Perform This Action in Synergy Due to.....	73
11007: The Request is Invalid Because the Synergy Item is Not a Document.....	73
11008: The Synergy Item Does Not Exist to Enable Modification.....	73
11009: The Synergy Item Cannot be Converted Into the Requested Format.....	73
11010: User Not Sent or Not Found	74
Synergy Terminology.....	74

Synergy as a Provider jXchange Service Gateway

Synergy is an Enterprise Content Management solution used to store and retrieve electronic items such as documents, checks, and reports. Synergy is a Service Gateway Provider for these contracts.

jXchange provides a web-based, services-oriented architecture on a .NET platform that offers open connectivity between Jack Henry core and complementary solutions and third-party products. This contemporary integration utility increases banks' operating flexibility and enables them to use their existing and future technology investments.

General Information and Best Practices

- This document is intended for application engineers needing to integrate with Synergy.
- Direct all integration installation request to the Jack Henry IDG - Product Adoption team.

Integration testing must be deemed successful by a member of Jack Henry before beta testing or rollout.

Synergy is a Service Provider for the following contracts within jXchange:

CustomerMaster: These supported calls are used for retrieving data regarding Synergy metadata structure and Synergy items.

- SvcDictSrch (DocImgAdd) - Used to retrieve the Synergy CTI structure for documents, and it can be used to determine required metadata for DocImgAdd.
- SvcDictSrch (DocImgSrch) - Used to retrieve all metadata for documents, checks, reports, and Document Tracking.

ImageMaster: The calls supported here are used for adding or modifying items within Synergy, as well as retrieving items.

- DocImgMod
- DocImgAdd

InquiryMaster: The UsrOperInq call is used to retrieve authority information about a given user.

Overall Expectations

The information in this guide applies to all incoming requests/responses.

Request

This section contains specific request information for you to enter in the request message. The data entered in the request determines what data you receive in the response message.

jXchangeHdr

The following sections applies to jXchangeHdr requests.

AuditUsrId

This field is required and is used for Enterprise Audit. It contains the user name of the requester.

For example: `<AuditUsrId>jdoe</AuditUsrId>`

AuditWsId

This field is required and is used for Enterprise Audit. It should contain the workstation name of the requester.

For example: `<AuditWsId>DEVLAB110</AuditWsId>`

InstRtId

Synergy requires this element. This field was optional by contract prior to July 1, 2016.

The Routing Number is mapped to an Organization and Institution list in jXchange Integration Maintenance in Synergy System Administration.

For Example: `<InstRtId>22222222</InstRtId>`

InstEnv

This field is required to be passed, but it is not used by Synergy yet. For now, request routing is done solely by routing number.

AuthenUserCred

If this entry is populated, the entry must be a valid IMS Token.

IMS Token

Synergy checks the SAML Token to ensure:

- The signature is valid.
- The token has not expired.
- It provides a Synergy-specific alias.

Note

If no Synergy-specific alias is passed in, then Synergy uses the passed in *WindowsAccountName*.

If the value is not a valid IMS Token, then a 11002 exception is returned along with a reason.

NULL

If there is no valid IMS token available, do not send this element.

If not sent/*NULL*, then an Organization Alias must be configured for the **Routing Number** by Synergy personnel in Synergy System Administration.

Date Format

DateTime must be provided in Coordinated Universal Time (UTC).

CAUTION

You must format data in the following manner.

Synergy accepts any of these formats:

- 2013-01-09 00:00:00.000000000-04:00
- 2013-05-11T15:02Z
- 2013-05-11T11:02-04:00

Response

After sending the request message, the system receives and processes the request, and then returns a message in a response.

jXchangeHdr

Echoes information sent in the jXchangeHdr from the request.

Date Format

This value is returned in Coordinated Universal Time (UTC).

Synergy index definitions, as established by customers in the Synergy Organization Administration web client, do not support time. These definitions are date-only. Thus, a Synergy date index is returned as the following: **2015-12-28**.

Information set by Synergy, such as *Created* or *Modified* values, includes time. These values are returned as the following: **2015-12-28 12:53:27Z**.

Vocabulary Mapping and Open Vocabulary Mapping

This section provides details about Vocabulary Mapping and Open Vocabulary mapping.

DocImgAdd, DocImgMod, DocImgCrossIdxAdd, and DocImgSrch

The following information applies to these functions: DocImgAdd, DocImgMod, DocImgCrossIdxAdd, and DocImgSrch:

- Open Vocabulary is available for use, if specified.
- Open Vocabulary is used for Institutions, Cabinets, Types, and Indexes.
- Vocabulary Mapping is applied for all of these functions. However, if Open Vocabulary is specified, then Vocabulary Mapping is applied after Open Vocabulary.
- These functions do not return responses via Vocabulary Mapping. The functions return responses using what is defined in Synergy.

Open Vocabulary allows mapping **Institution, Cabinet, Type, and Indexes**.

Vocabulary Mapping applies to Indexes only. For example, DocImgIdx items with a DocImgIdxType Index.

DocImgSrch

DocImgSrch applies Vocabulary Mapping to **Cabinet** and **Indexes**. DocImgSrch is different from the other functions that apply Vocabulary Mapping to indexes only.

SvcDictSrch: DocImgSrch and SvcDictSrch - DocImgAdd

SvcDictSrch: DocImgSrch and SvcDictSrch - DocImgAdd do not use Vocabulary Mapping.

UsrOperInq

Use UsrOperInq to determine if a user has permission to archive (DocImgAdd) and/or modify (DocImgMod) documents in Synergy.

Synergy Module

Document

Synergy Security Considerations

For UsrOperInq, user information must be passed as an IMS token in the AuthenUserCred of the jXchangeHdr. If this is not sent or contains an invalid IMS token, then a 11010 fault code is returned.

Note

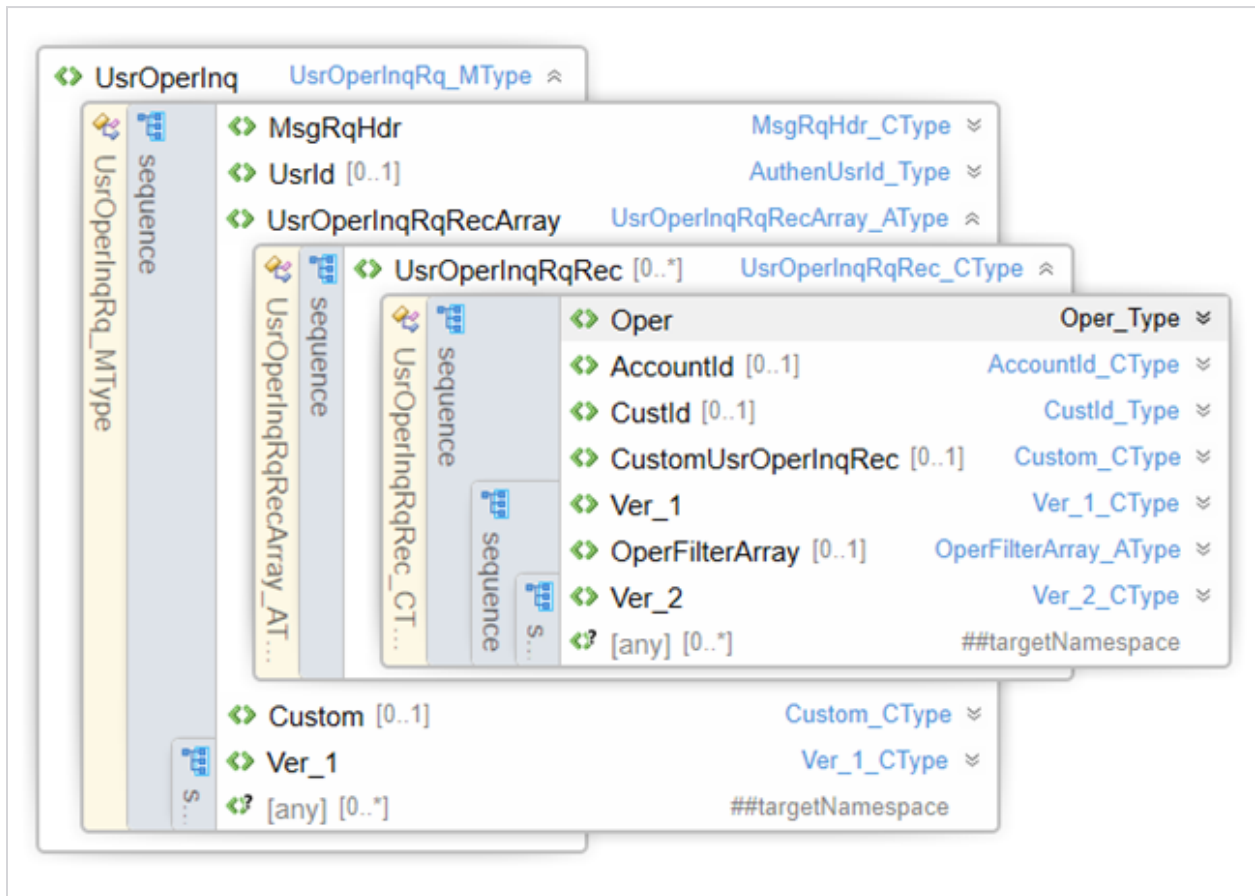
If Organization Alias is used for authentication, then `UsrOperInq` is not available. Synergy requires use of IMS token in the `AuthenUserCred` for `UsrOperInq`.

To receive a `ReadWrite` response for the `DocImgAdd` operation, the user must have access to the Synergy authority for Archive Document (Module: Document).

To receive a `ReadWrite` response for the `DocImgMod` operation, the user must have access to the Synergy authority for Refile Document (Module: Document).

UsrOperInq Request

Request



Userld

Although defined in the contract, Synergy does not support `Userld`. `Userld` is ignored, if provided.

For `UsrOperInq`, user information must be passed as an IMS token in the `AuthenUserCred` of the `jXchangeHdr`. If this information is not sent or contains an invalid IMS token, then a 11010 fault code is returned.

UsrOperInqRqRecArray

Use this array to specify the operations.

UsrOperInqRqRec

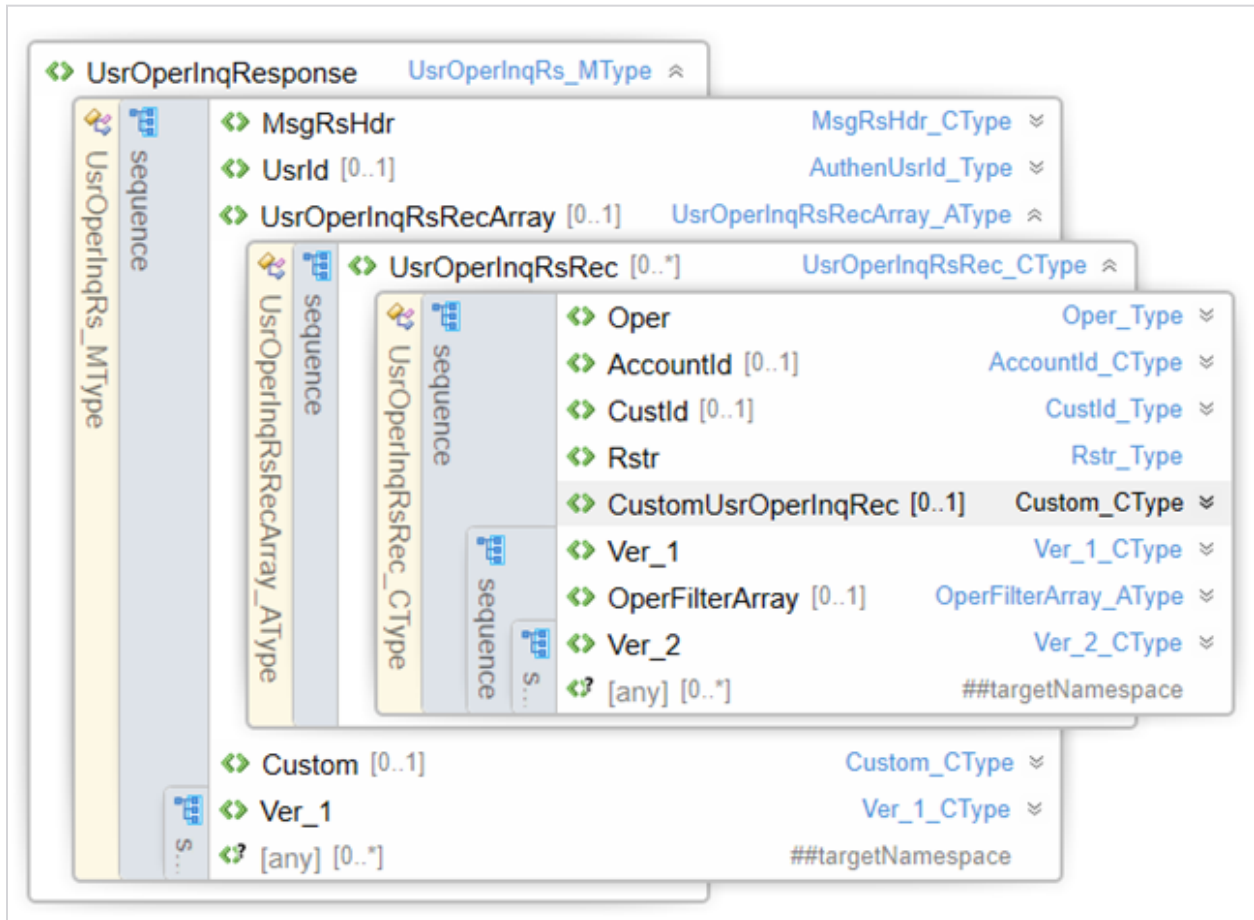
Oper

Synergy is a provider for the DocImgAdd and DocImgMod operations.

Any other values sent in **Oper** are ignored.

UsrOperInq Response

Response



UserID

Although defined in the contract, Synergy does not support *UserID*. *UserID* is not used to determine user permissions in Synergy.

UsrOperInqRsRecArray

Contains a response indicating the user's permissions state in Synergy.

UsrOperInqRsRec

Oper

Contains the name of the operation from the request.

Rstr

Indicates if the user has permission in Synergy.

- *ReadWrite* indicates that the user has permission.
- *NoAccess* means that the user does not have permission.

UsrOperInq Example

Synergy determines the user based on the **AuthenUsrCred** value sent in the `MsgRqHdr`. This value must be populated with a valid IMS token.

Request

```
<UsrOperInq>
  <UsrId xsi:nil="true" />
  <UsrOperInqRqRecArray>
    <UsrOperInqRqRec>
      <Oper>DocImgAdd</Oper>
      <AccountId xsi:nil="true" />
      <CustId xsi:nil="true" />
      <OperFilterArray xsi:nil="true" />
    </UsrOperInqRqRec>
    <UsrOperInqRqRec>
      <Oper>DocImgMod</Oper>
      <AccountId xsi:nil="true" />
      <CustId xsi:nil="true" />
      <OperFilterArray xsi:nil="true" />
    </UsrOperInqRqRec>
  </UsrOperInqRqRecArray>
  <Custom xsi:nil="true" />
</UsrOperInq>
```

Response

```
<UsrOperInqResponse>
  <UsrId xsi:nil="true" />
  <UsrOperInqRsRecArray>
    <UsrOperInqRsRec>
```

```

<Oper>DocImgAdd</Oper>
<AccountId xsi:nil="true" />
<CustId xsi:nil="true" />
<Rstr>ReadWrite</Rstr>
<OperFilterArray xsi:nil="true" />
</UsrOperInqRsRec>
<UsrOperInqRsRec>
<Oper>DocImgMod</Oper>
<AccountId xsi:nil="true" />
<CustId xsi:nil="true" />
<Rstr>ReadWrite</Rstr>
<OperFilterArray xsi:nil="true" />
</UsrOperInqRsRec>
</UsrOperInqRsRecArray>
<Custom xsi:nil="true" />
</UsrOperInqResponse>

```

SvcDictSrch – DocImgAdd

Use SvcDictSrch – DocImgAdd to retrieve information about Cabinets, Indexes, and Institutions for either a specific Synergy Document Type or all Synergy Document Types.

Tip

See the section in this guide about Vocabulary Mapping and Open Vocabulary for more information.

Synergy Module

Document

Synergy Security Considerations

- Users must have access to the Document module in Synergy.
- Synergy Profile restrictions are not applied when returning this structural information.
- Cabinet, type, and index information returned are for the user's current File Room.

Best Practices

To optimize results, consider this information when using SvcDictSrch – DocImgAdd.

- Performances can be impacted when retrieving institutions, cabinets, types, indexes, and index properties each time prior to adding a document. Instead, retrieve this information ahead of time. If retrieved ahead of time, there is a way to access the list again in case the cabinet, type, or index information is updated, such as adding a cabinet or index.

SvcDictName

Use `SvcDictName_Type=DocImgAdd`.

SvcDictType

Use `SvcDictType_Type=Rq`.

SvcDictFilterArray

If no **SvcDictFilterArray** value is sent, all Cabinet, Type, Index, and Institution information is returned. To return information for a specific *Type* or to return Smart Index lookup values, send the **SvcDictFilterCode/SvcDictFilterVal** pairs.

When you pass a **SvcDictFilterCode/SvcDictFilterVal** pair:

- Any valid Synergy *Type* may be passed.
- If a *Type* value is provided that does not exist in Synergy, an empty list of Cabinets, Indexes, and Institutions are returned.

SvcDictFilterCode

For **SvcDictFilterCode**, send *Type* to return Cabinets, Institutions, and Indexes.

Send *DocImgIdxType* to return Smart Index lookup values.

SvcDictFilterVal

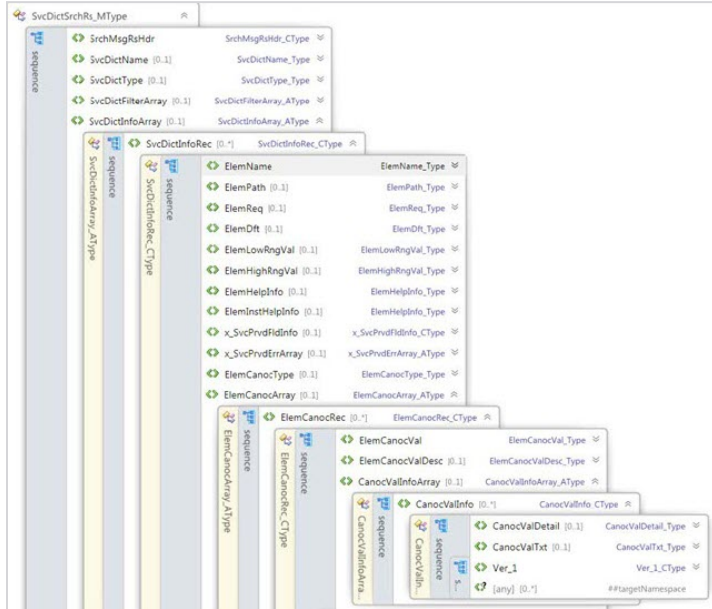
When using *Type*, the **SvcDictFilterVal** must specify a single *Type* name.

When using **DocImgIdxType**, send **SvcDictFilterCode** of **DocImgIdxType** with a **SvcDictFilterVal** value of *IndexLookup* to return all defined and required Smart Index lookup values.

SvcDictSrch – DocImgAdd Response

Based on the request, the response returns a hierarchical list of Cabinets, Indexes, and Institutions for the indicated *Type* or for all *Types*.

Response



SvcDictName

Matches the request SvcDictName: DocImgAdd.

SvcDictInfoArray

Array of SvcDictInfoRec each corresponding to the Synergy Type.

SvcDictInfoRec

ElemName

Name of the Synergy Type whose Cabinets and Indexes are listed in the ElemCanocArray.

ElemCanocArray

An array of canonical values as related to a specific element.

ElemCanocVal

The canonical value for a specific element Synergy returns: INDEX, CABINET, and INSTITUTION. There can be more than one INDEX, CABINET, and INSTITUTION associated to the TYPE.

For example, an APPLICATION Type could exist in the LOANS – MORTGAGE cabinet and in the LOANS – AUTO cabinet.

ElemCanocValDesc

The description of the canonical value for a specific element. As an example Synergy could return Account Number for an INDEX, Loans for a CABINET, or 00 for an INSTITUTION.

CanoncValInfoArray

When the canonical value is an INDEX, it also returns additional information.

CanocValDetail

Additional information includes Synergy Index properties like NAME, DATATYPE, and LENGTH.

CanocValTxt

Any service provider text related to the canonical value like ACCOUNT NUMBER, ALPHA, 12, 2, REQUIRED, MULTI-VALUE.

Example 1 – Retrieving Cabinets, Institutions, and Indexes for a Specific Type

Request

```
<SvcDictSrch>
<SvcDictName>DocImgAdd</SvcDictName>
<SvcDictType>Rq</SvcDictType>
<ElemName xsi:nil="true" />
<SvcDictFilterArray>
<SvcDictFilterInfo>
<SvcDictFilterCode>Type</SvcDictFilterCode>
<SvcDictFilterVal>APPRAISAL</SvcDictFilterVal>
</SvcDictFilterInfo>
</SvcDictFilterArray>
</SvcDictSrch>
```

Response

```
<SvcDictSrchResponse>
<SvcDictName>DocImgAdd</SvcDictName>
<SvcDictType>Rs</SvcDictType>
<SvcDictFilterArray xsi:nil="true" />
<SvcDictInfoArray>
<SvcDictInfoRec>
<ElemName>APPRAISAL</ElemName>
<ElemCanocArray>
<ElemCanocRec>
<ElemCanocVal>Cabinet</ElemCanocVal>
<ElemCanocValDesc>LOANS - COMMERCIAL</ElemCanocValDesc>
</ElemCanocRec>
<ElemCanocRec>
<ElemCanocVal>Cabinet</ElemCanocVal>
<ElemCanocValDesc>LOANS - FARM</ElemCanocValDesc>
</ElemCanocRec>
<ElemCanocRec>
```

```

<ElemCanocVal>Cabinet</ElemCanocVal>
<ElemCanocValDesc>LOANS - MORTGAGE</ElemCanocValDesc>
</ElemCanocRec>
<ElemCanocRec>
<ElemCanocVal>Index</ElemCanocVal>
<ElemCanocValDesc>ACCOUNT NUMBER</ElemCanocValDesc>
<CanocValInfoArray>
<Canoc ValInfo>
<CanocValDetail>Required</CanocValDetail>
<CanocValTxt>>false</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
<CanocValDetail>DataType</CanocValDetail>
<CanocValTxt>Numeric</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
<CanocValDetail>Length</CanocValDetail>
<CanocValTxt>15</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
<CanocValDetail>Decimal</CanocValDetail>
<CanocValTxt>0</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
<CanocValDetail>MultiValue</CanocValDetail>
<CanocValTxt>>false</CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
</ElemCanocRec>
<ElemCanocRec>
<ElemCanocVal>Index</ElemCanocVal>
<ElemCanocValDesc>DATE - DOCUMENT</ElemCanocValDesc>
<CanocValInfoArray>
<CanocValInfo>
<CanocValDetail>Required</CanocValDetail>
<CanocValTxt>>false</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
<CanocValDetail>DataType</CanocValDetail>
<CanocValTxt>Date</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
<CanocValDetail>Length</CanocValDetail>
<CanocValTxt>10</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
<CanocValDetail>Decimal</CanocValDetail>
<CanocValTxt>0</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
<CanocValDetail>MultiValue</CanocValDetail>
<CanocValTxt>>false</CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
</ElemCanocRec>
<ElemCanocRec>
<ElemCanocVal>Index</ElemCanocVal>
<ElemCanocValDesc>LOAN NUMBER</ElemCanocValDesc>
<CanocValInfoArray>

```

```

<CanocValInfo><CanocValDetail>Required</CanocValDetail>
<CanocValTxt>>false</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
<CanocValDetail>DataType</CanocValDetail>
<CanocValTxt>Char</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
<CanocValDetail>Length</CanocValDetail>
<CanocValTxt>12</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
<CanocValDetail>Decimal</CanocValDetail>
<CanocValTxt>0</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
<CanocValDetail>MultiValue</CanocValDetail>
<CanocValTxt>>false</CanocValTxt>
</CanocValInfo>
</CanocValInfoArray>
</ElemCanocRec>
<ElemCanocRec>
<ElemCanocVal>Institution</ElemCanocVal>
<ElemCanocValDesc>00</ElemCanocValDesc>
</ElemCanocRec>
<ElemCanocRec>
<ElemCanocVal>Institution</ElemCanocVal>
<ElemCanocValDesc>81</ElemCanocValDesc>
</ElemCanocRec>
<ElemCanocRec>
<ElemCanocVal>Institution</ElemCanocVal>
<ElemCanocValDesc>88</ElemCanocValDesc>
</ElemCanocRec>
</ElemCanocArray>
</SvcDictInfoRec>
</SvcDictInfoArray>
</SvcDictSrchResponse>

```

Example 2 - Retrieving Cabinets, Institutions, and Indexes for all Types

The response is not shown in this document.

Request

```

<SvcDictSrch>
<SvcDictName>DocImgAdd</SvcDictName>
<SvcDictType>Rq</SvcDictType>
<ElemName xsi:nil="true" />
<SvcDictFilterArray />
<IncXtendElemArray xsi:nil="true" />
</SvcDictSrch>

```

Example 3 – Retrieving Smart Index Required Lookup Values

Request

```
<SvcDictSrch>
<SvcDictName>DocImgAdd</SvcDictName>
<SvcDictType>Rq</SvcDictType>
<ElemName xsi:nil="true"/>
<SvcDictFilterArray>
<SvcDictFilterInfo>
<SvcDictFilterCode>DocImgIdxType</SvcDictFilterCode>
<SvcDictFilterVal>IndexLookup</SvcDictFilterVal>
</SvcDictFilterInfo>
</SvcDictFilterArray>
</SvcDictSrch>
```

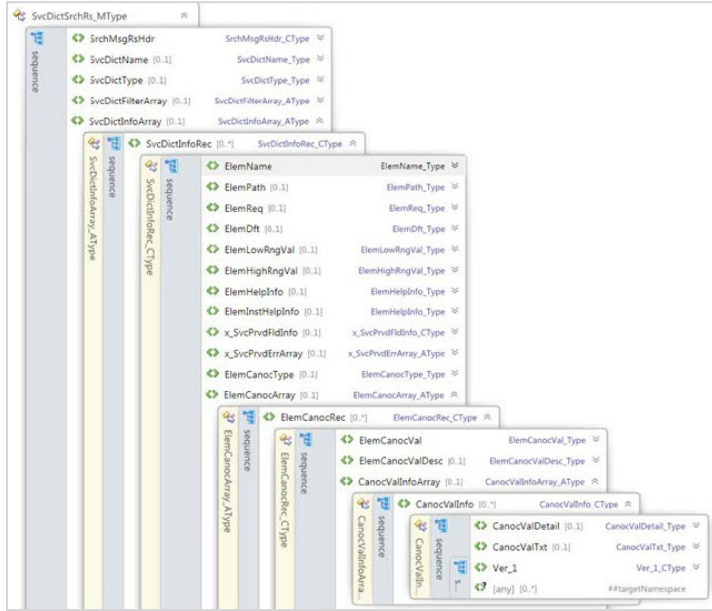
Response

```
<SvcDictSrchResponse>
<SvcDictName>DocImgAdd</SvcDictName>
<
  SvcDictType>Rs</SvcDictType>
<SvcDictFilterArray xsi:nil="true" />
<SvcDictInfoArray>
<SvcDictInfoRec>
<ElemName>DocImgIdxName</ElemName>
<ElemPath>DocImgInfoArray.DocImgInfo.DocImgDetArray.DocImgDetInfo.DocImgIdxA
rray.DocImgIdx</ElemPath>
<ElemReq>N</ElemReq>
<ElemCanonType>Open</ElemCanonType>
<ElemCanocArray>
<ElemCanocRec>
<ElemCanocVal>ACCOUNT NUMBER</ElemCanocVal>
<ElemCanocValDesc></ElemCanocValDesc>
<CanocValInfoArray>
<CanocValInfo>
<CanocValDetail>Cabinet</CanocValDetail>
<CanocValTxt>LOANS</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
<CanocValDetail>Type</CanocValDetail>
<CanocValTxt>APPRAISAL</CanocValTxt>
</CanocValInfo>
<CanocValInfo>
<CanocValDetail>Required</CanocValDetail>
<CanocValTxt>TRUE</CanocValTxt>
</CanocValInfo>
</ElemCanocRec>
</SvcDictInfoRec>
```

SvcDictSrch – DocImgAdd Response

Based on the request, the response returns a hierarchical list of Cabinets, Indexes, and Institutions for the indicated Type or for all Types.

Response



DocImgAdd

DocImgAdd allows adding a document to Synergy by specifying its files and indexing information.

Tip

See the section in this guide about Vocabulary Mapping and Open Vocabulary for more information on using Vocabulary Mapping and Open Vocabulary with this function.

The files can be any Synergy supported format including TIFF, JPG, Office Documents, PDF, GIF, etc.

The indexing information specifies the Synergy Cabinet, Type, required Indexes, and optionally Institution, Name, and View Authority.

Note

Cabinets, Types, and Indexes are defined at the customer site. These values are not fixed.

Synergy Module

Document

Synergy Security Considerations

The user must have proper Synergy Authority. Module: Document, Name: Archive Document.

The document is added to Synergy in the user's current, last logged in to File Room. Synergy Storage Profile restrictions are enforced for DocImgAdd.

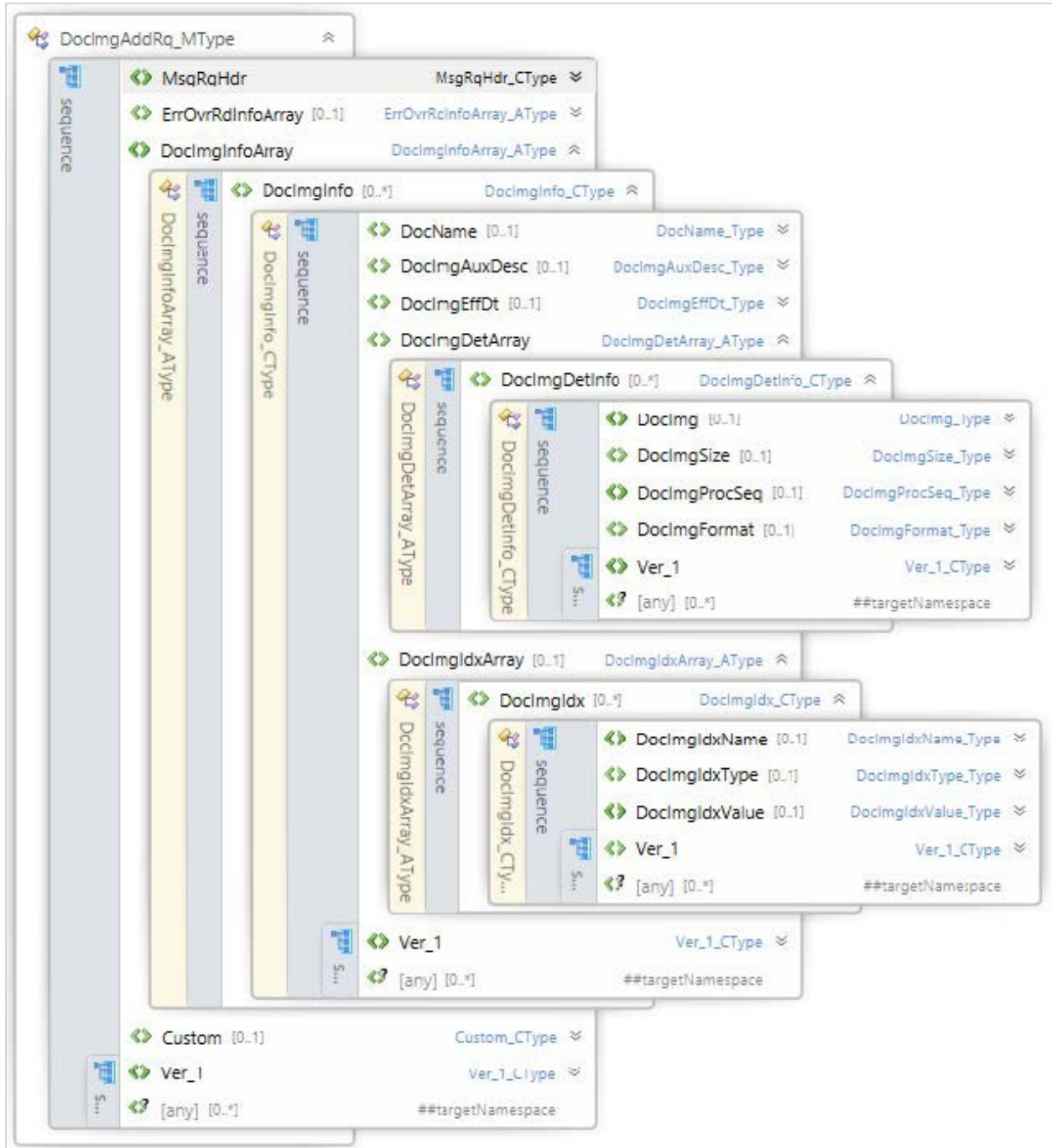
Note

The Storage Profile used is different depending on whether authentication is via Org Alias or IMS token.

Note

Synergy does not support IP v6. Synergy has a 50-megabyte size limit on DocImgAdd.

DocImgAdd Request Request



DocmgInfoArray

Use DocmgInfoArray to indicate which specific item to file. Only one document is supported per DocmgAdd request so this array must contain exactly one DocmgInfo element.

Note

Although this is an array, Synergy only allows one item to be added per request.

DocName

This entry can be used to set the document name, but it is overridden if **Name** is also provided in the DocImgIdxArray.

CAUTION

Synergy is deprecating support for DocName in Synergy 2018.0. Specify the **Name** in the DocImgIdxArray.

DocImgAuxDesc

This entry can be used to set the document type, but it is overridden if **Type** is also provided in the DocImgIdxArray.

CAUTION

Synergy is deprecating support for DocImgAuxDesc in Synergy 2018.0. Specify the **Type** in the DocImgIdxArray.

DocImgEffDt

Although defined in the contract, this entry is not supported by Synergy. This entry is ignored, if provided.

DocImgIdxArray

Use DocImgIdxArray to indicate the properties used to file the document in Synergy.

When filing a document into Synergy, it must have:

- One value for **Cabinet**.
- One value for **Type**.
- One value for **Name**.
- One value for **Institution**.
- One value for **Authority**.

Institution, **Name**, and (view) **Authority** can be optionally provided, but if they are not, then the default assignments for the Cabinet and Type, as set up in Synergy Organization Administration, are applied. Filing preferences for the institution must be set for the Cabinet and Type. Otherwise, the request errors out. You do not need to set all filing preferences, just the institution.

Cabinet, Type, and at least one Index are required in DocImgIdx per DocImgAdd request. Filing may require more than one Index depending on required index configuration at the customer site.

DocImgIdxType

This entry can be set to Cabinet, Type, Index, Name, Institution, Authority, or IndexLookup. If you specify a **DocImIdxType** of **IndexLookup**, the value passed is a Smart Index Lookup value. When the document is filed, results from the lookup are filled in.

DocImIdxName

If the DocImIdxType is Cabinet, Type, Name, Institution, or Authority, then its DocImIdxName is the same (Cabinet, Type, Name, Institution, or Authority). If the DocImIdxType is Index, then use DocImIdxName to identify which Index by name such as AccountNumber or TaxID. This name may use either Vocabulary Mapping or the Index Name as defined in Synergy.

DocImIdxValue

Specifies the value of the element such as Name, Type, Cabinet, Institution, Authority, or Index. Here is some helpful information about Index values:

- Send unformatted values. For example, send a Social Security Number as *123456789*, not *123-45-6789*.
- **DateTime** must be specified as UTC. Synergy accepts the following formats:
 - *2013-01-09 00:00:00.000000000-04:00*
 - *2013-05-11T15:02Z*
 - *2013-05-11T11:02-04:00*
- If the Index is set up as multi-value in Synergy, then repeat the DocImIdxType and DocImIdxName for each desired DocImIdxValue. These entries do not need to be sequential in the array.

Here is some helpful information about Institution values:

- An Institution in Synergy is an aspect of item classification. An Institution is not necessarily a one-to-one correlation to the Routing Number ID (or ABA Number).
- More than one Synergy Institutions may be associated to the Routing Number ID (or ABA Number). If that is the case, then Synergy recommends specifying the Institution value.

The following business rules apply to Institution values:

- If the Institution value is specified and is associated to the Routing Number ID (or ABA Number), then it is used.
- If the Institution value is specified but is not associated to the Routing Number ID (or ABA Number), then a 11005 error is returned.
- If the Institution value is not specified, but the Routing Number ID (or ABA Number) is only associated to one Synergy Institution value, then this lone Institution value is used.

- If the Institution value is not specified and the Routing Number ID (or ABA Number) is associated to more than one Synergy Institution, then Filing Preferences are examined. Filing Preferences are established in the Synergy Organization Administration Client.
 - If there is a Filing Preference set for an Institution, and that Institution is associated with the Routing Number ID (or ABA Number), then it is used.
 - If there is a Filing Preference set for an Institution, but that Institution is not associated with the Routing Number ID (or ABA Number), then the 11001 error is returned.
 - If there is no Filing Preference set, then the 11001 error is returned.

DocImgDetArray

Send a DocImgDetInfo per file to make up the document to be stored in Synergy.

Files that support multiple pages, such as .docx or .pdf, only require one DocImgDetInfo. Synergy recognizes all pages in the file.

Files that only support a single page, such as .jpg, requires one DocImgDetInfo per file. If it is to be stored in Synergy as a three page document, then there must be three DocImgDetInfo entries – one per jpg file.

DocImg

This entry is a Base64 encoded byte array of the bytes representing the page's file.

DocImgSize

Although defined in the contract, this entry is not used by Synergy and is ignored, if provided.

DocImgProcSeq

This value is a number representing the sequence of this DocImgDetInfo (i.e., Page), if multiple records are present. This sequence starts at 1 and is incremented by 1.

DocImgFormat

This value represents the format of the image in DocImg and is usually the file extension such as tif, txt, docx, pdf, etc.

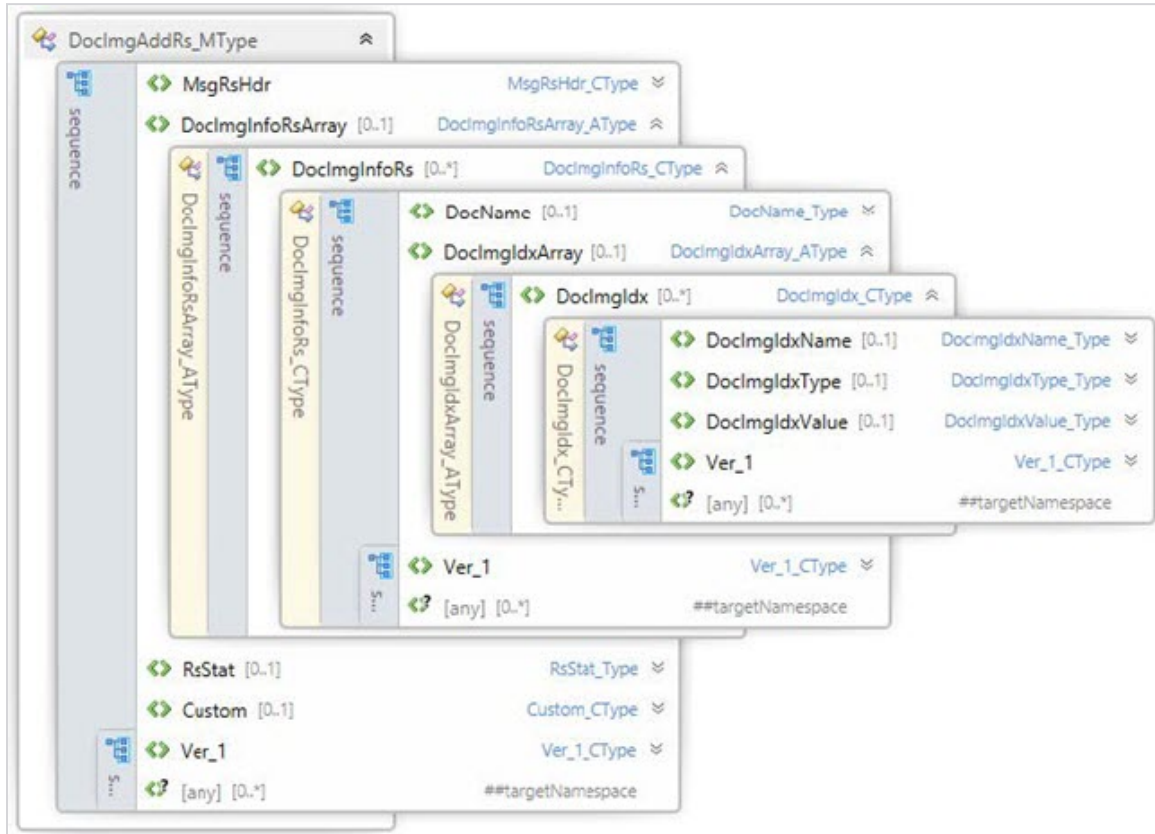
Note

There is no period in the extension.

DocImgAdd Response

Returns the status of the DocImgAdd operation and if successful, the array of DocImgIdx elements that reflect the indexes successfully applied.

Response



DocImgInfoRsArray

Contains one response for the request in DocImgInfoArray.

DocImgInfoRs

Contains response of the DocImgAdd operation for one DocImgInfo.

DocName

Document Name as sent in DocImgInfoArray.

CAUTION

Synergy is deprecating support for DocName in Synergy 2018.0. Find this information in the DocImgIdxArray as **Name** instead.

DocImgIdxArray

Array of DocImgIdx elements (DocImgIdxName, DocImgIdxType, DocImgIdxValue) that are values successfully applied to the document in Synergy.

If an element specified in the DocImgIdxArray of the request was not applied/applicable, then this information is not returned in the DocImgIdxArray response.

If **Institution, Name**, and/or (view) **Authority** were not specified in the request, then the default assignments, as set up in Synergy Organization Administration, are returned.

Example 1 – Without Smart Index Lookup Values

These XML requests and responses show a DocImgAdd example without Smart Index Lookup values.

Request

```
<DocImgAdd>
  <DocImgInfoArray>
    <DocImgInfo>
      <DocImgDetArray>
        <DocImgDetInfo>
          <DocImg>W21luc2VydCBpbWFnZSBoZXJlXQ==</DocImg>
          <DocImgSize>0</DocImgSize>
          <DocImgProcSeq>1</DocImgProcSeq>
          <DocImgFormat>JPG</DocImgFormat>
        </DocImgDetInfo>
      </DocImgDetArray>
      <DocImgIdxArray>
        <DocImgIdx>
          <DocImgIdxType>Cabinet</DocImgIdxType>
          <DocImgIdxName>Cabinet</DocImgIdxName>
          <DocImgIdxValue>PDF PS REVIEW</DocImgIdxValue>
        </DocImgIdx>
        <DocImgIdx>
          <DocImgIdxType>Type</DocImgIdxType>
          <DocImgIdxName>Type</DocImgIdxName>
          <DocImgIdxValue> REVIEW</DocImgIdxValue>
        </DocImgIdx>
        <DocImgIdx>
          <DocImgIdxType>Name</DocImgIdxType>
          <DocImgIdxName>Name</DocImgIdxName>
          <DocImgIdxValue>Example for WP</DocImgIdxValue>
        </DocImgIdx>
        <DocImgIdx>
          <DocImgIdxType>Institution</DocImgIdxType>
          <DocImgIdxName>Institution</DocImgIdxName>
          <DocImgIdxValue>00</DocImgIdxValue>
        </DocImgIdx>
        <DocImgIdx>
          <DocImgIdxType>Authority</DocImgIdxType>
          <DocImgIdxName>Authority </DocImgIdxName>
          <DocImgIdxValue>12345</DocImgIdxValue>
        </DocImgIdx>
        <DocImgIdx>
          <DocImgIdxName>ACCOUNT NUMBER</DocImgIdxName>
          <DocImgIdxType>Index</DocImgIdxType>
          <DocImgIdxValue>112233445</DocImgIdxValue>
        </DocImgIdx>
      </DocImgIdxArray>
    </DocImgInfo>
  </DocImgInfoArray>
```

Response

DocImgAdd response does not use Vocabulary Mapping. The DocImgIdxName returned in the response is that which is defined in Synergy.

```
<DocImgAddResponse>
<DocImgInfoRsArray>
<DocImgInfoRs>
<DocImgIdxArray>
<DocImgIdx>
<DocImgIdxType>Cabinet</DocImgIdxType>
<DocImgIdxName>Cabinet</DocImgIdxName>
<DocImgIdxValue>PDF PS REVIEW</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxType>Type</DocImgIdxType>
<DocImgIdxName>Type</DocImgIdxName>
<DocImgIdxValue> REVIEW</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxType>Name</DocImgIdxType>
<DocImgIdxName>Name</DocImgIdxName>
<DocImgIdxValue>Example for WP</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxType>Institution</DocImgIdxType>
<DocImgIdxName> Institution</DocImgIdxName>
<DocImgIdxValue>00</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxType>Authority</DocImgIdxType>
<DocImgIdxName> Authority </DocImgIdxName>
<DocImgIdxValue>12345</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>ACCOUNT NUMBER</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>112233445</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>UniqueIndex</DocImgIdxName>
<DocImgIdxType>UniqueIndex</DocImgIdxType>
<DocImgIdxValue>unique value used to identify the item</DocImgIdxValue>
</DocImgIdx>
</DocImgIdxArray>
</DocImgInfoRs>
</DocImgInfoRsArray>
<RsStat>Success</RsStat>
</DocImgAddResponse>
```

Example 2 – With Smart Index Lookup Values

These XML requests and responses show a DocImgAdd example with Smart Index Lookup values.

Request

```
<DocImgAdd>
  <DocImgInfoArray>
    <DocImgInfo>
      <DocImgDetArray>
        <DocImgDetInfo>
          <DocImg>W21luc2VydCBpbWFnZSB0ZXJlXQ==</DocImg>
          <DocImgSize>0</DocImgSize>
          <DocImgProcSeq>1</DocImgProcSeq>
          <DocImgFormat>JPG</DocImgFormat>
        </DocImgDetInfo>
      </DocImgDetArray>
      <DocImgIdxArray>
        <DocImgIdx>
          <DocImgIdxType>Cabinet</DocImgIdxType>
          <DocImgIdxName>Cabinet</DocImgIdxName>
          <DocImgIdxValue>PDF PS REVIEW</DocImgIdxValue>
        </DocImgIdx>
        <DocImgIdx>
          <DocImgIdxType>Type</DocImgIdxType>
          <DocImgIdxName>Type</DocImgIdxName>
          <DocImgIdxValue>REVIEW</DocImgIdxValue>
        </DocImgIdx>
        <DocImgIdx>
          <DocImgIdxType>Name</DocImgIdxType>
          <DocImgIdxName>Name</DocImgIdxName>
          <DocImgIdxValue>Example for WP</DocImgIdxValue>
        </DocImgIdx>
        <DocImgIdx>
          <DocImgIdxType>Institution</DocImgIdxType>
          <DocImgIdxName>Institution</DocImgIdxName>
          <DocImgIdxValue>00</DocImgIdxValue>
        </DocImgIdx>
        <DocImgIdx>
          <DocImgIdxType>Authority</DocImgIdxType>
          <DocImgIdxName>Authority</DocImgIdxName>
          <DocImgIdxValue>12345</DocImgIdxValue>
        </DocImgIdx>
        <DocImgIdx>
          <DocImgIdxName>ACCOUNT NUMBER</DocImgIdxName>
          <DocImgIdxType>IndexLookup</DocImgIdxType>
          <DocImgIdxValue>111111111</
DocImgIdxValue>

      </DocImgIdx>
    </DocImgIdxArray>
  </DocImgInfo>
</DocImgInfoArray>
```

Response

DocImgAdd response does not use Vocabulary Mapping. The DocImgIdxName returned in the response is that which is defined in Synergy.

```
<DocImgAddResponse>
<DocImgInfoRsArray>
<DocImgInfoRs>
<DocImgIdxArray>
<DocImgIdx>
<DocImgIdxType>Cabinet</DocImgIdxType>
<DocImgIdxName>Cabinet</DocImgIdxName>
<DocImgIdxValue>PDF PS REVIEW</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxType>Type</DocImgIdxType>
<DocImgIdxName>Type</DocImgIdxName>
<DocImgIdxValue> REVIEW</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxType>Name</DocImgIdxType>
<DocImgIdxName>Name</DocImgIdxName>
<DocImgIdxValue>Example for WP</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxType>Institution</DocImgIdxType>
<DocImgIdxName> Institution</DocImgIdxName>
<DocImgIdxValue>00</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxType>Authority</DocImgIdxType>
<DocImgIdxName> Authority </DocImgIdxName>
<DocImgIdxValue>12345</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>ACCOUNT NUMBER</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>11111111</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdx>
<DocImgIdxName>NAME</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>John Q Doe</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>UniqueIndex</DocImgIdxName>
<DocImgIdxType>UniqueIndex</DocImgIdxType>
<DocImgIdxValue>unique value used to identify the item</></DocImgIdxValue>
</DocImgIdx>
</DocImgIdxArray>
</DocImgInfoRs>
</DocImgInfoRsArray>
<RsStat>Success</RsStat>
</DocImgAddResponse>
```

SvcDictSrch – DocImgSrch

Use SvcDictSrch – DocImgSrch to return a flat list of every data element for Document, Check, Report, and/or Document Tracking as specified in the filter.

Tip

See the section in this guide about Vocabulary Mapping and Open Vocabulary for more information.

This information is returned from all File Rooms and does not depend on the User Authorities, Module access, or Profiles.

Synergy Modules

All modules - Document, Check, Report, and Document Tracking.

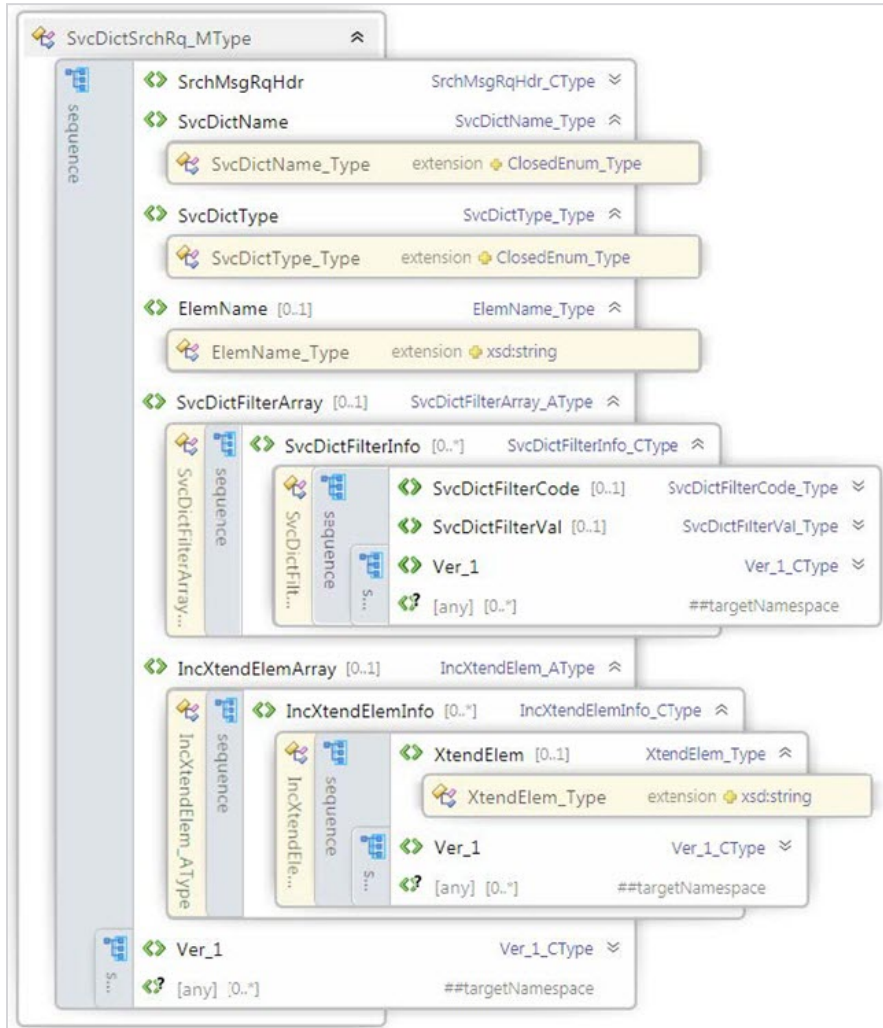
Synergy Security Consideration

The user does not require any specific Synergy Authority or Module Access.

Synergy Profile restrictions are not applied when returning this structural information.

Information returned is for all File Rooms associated to the Routing Number ID.

SvcDictSrch – DocImgSrch Request Request



SvcDictName

Use SvcDictName_Type=DocImgSrch.

SvcDictType

Use SvcDictType_Type=Rq.

SvcDictFilterArray

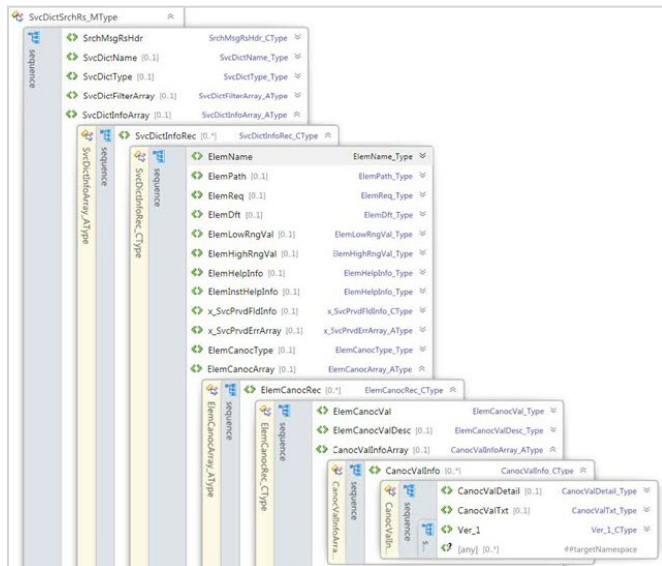
SvcDictFilterCode

Module is the only filter criteria Synergy supports for DocImgSrch.

SvcDictFilterVal

Synergy supports Document, Check, Report, Document Tracking, or All. A lack of value is treated like All.

SvcDictSrch – DocImgSrch Response



SvcDictName

Matches the request SvcDictName: DocImgSrch.

SvcDictInfoArray

Array of SvcDictInfoRec.

SvcDictInfoRec

One record is returned with DocImgSrch with an ElemName: SynergySvcDict.

ElemCanocArray

An array of canonical values as related to a specific element.

ElemCanocVal

The canonical value for a specific element Synergy returns: APPLICATION, AUTHORITY, CABINET, DATEGROUP, DTPROP, INDEX, INSTITUTION, NAME, REPORT, and TYPE.

ElemCanocValDesc

The description of the canonical value for a specific element. As an example, Synergy could return Type for Type, Cabinet for Cabinet, and Institution for Institution.

SvcDict: DocImgSrch Example 1 (With FilterCode)

Request

```
<SvcDictSrch>
  <SvcDictName>DocImgSrch</SvcDictName>
  <SvcDictType>Rq</SvcDictType>
  <ElemName xsi:nil="true" />
  <SvcDictFilterArray>
    <SvcDictFilterInfo>
      <SvcDictFilterCode>Module</SvcDictFilterCode>
      <SvcDictFilterVal>Document</SvcDictFilterVal>
    </SvcDictFilterInfo>
  </SvcDictFilterArray>
  <IncXtendElemArray xsi:nil="true" />
</SvcDictSrch>
```

Response

```
<SvcDictSrchResponse>
  <SvcDictName>DocImgSrch</SvcDictName>
  <SvcDictType>Rs</SvcDictType>
  <SvcDictFilterArray xsi:nil="true" />
  <SvcDictInfoArray>
    <SvcDictInfoRec>
      <ElemName>SynergySvcDict</ElemName>
      <ElemCanocArray>
        <ElemCanocRec>
          <ElemCanocVal>Created</ElemCanocVal>
          <ElemCanocValDesc>Created</ElemCanocValDesc>
        </ElemCanocRec>
        <ElemCanocRec>
          <ElemCanocVal>DocID</ElemCanocVal>
          <ElemCanocValDesc>DocID</ElemCanocValDesc>
        </ElemCanocRec>
        <ElemCanocRec>
          <ElemCanocVal>Modified</ElemCanocVal>
          <ElemCanocValDesc>Modified</ElemCanocValDesc>
        </ElemCanocRec>
        <ElemCanocRec>
          <ElemCanocVal>Pages</ElemCanocVal>
          <ElemCanocValDesc>Pages</ElemCanocValDesc>
        </ElemCanocRec>
        <ElemCanocRec>
          <ElemCanocVal>Index</ElemCanocVal>
          <ElemCanocValDesc>ACCOUNT NUMBER</ElemCanocValDesc>
        </ElemCanocRec>
        <ElemCanocRec>
          <ElemCanocVal>Index</ElemCanocVal>
          <ElemCanocValDesc>BORROWER</ElemCanocValDesc>
        </ElemCanocRec>
        <ElemCanocRec>
          <ElemCanocVal>Index</ElemCanocVal>
          <ElemCanocValDesc>CIF NUMBER</ElemCanocValDesc>
        </ElemCanocRec>
      </ElemCanocArray>
    </SvcDictInfoRec>
  </SvcDictInfoArray>
</SvcDictSrchResponse>
```

```

<ElemCanocVal>Index</ElemCanocVal>
<ElemCanocValDesc>CLOSED DATE</ElemCanocValDesc>
</ElemCanocRec>
<ElemCanocRec>
<ElemCanocVal>Index</ElemCanocVal>
<ElemCanocValDesc>DATE - DOCUMENT</ElemCanocValDesc>
</ElemCanocRec>
<ElemCanocRec>
<ElemCanocVal>Index</ElemCanocVal>
<ElemCanocValDesc>INVOICE NUM</ElemCanocValDesc>
</ElemCanocRec>
<ElemCanocRec>
<ElemCanocVal>Cabinet</ElemCanocVal>
<ElemCanocValDesc>Cabinet</ElemCanocValDesc>
</ElemCanocRec>
<ElemCanocRec>
<ElemCanocVal>Type</ElemCanocVal>
<ElemCanocValDesc>Type</ElemCanocValDesc>
</ElemCanocRec>
<ElemCanocRec>
<ElemCanocVal>Authority</ElemCanocVal>
<ElemCanocValDesc>Authority</ElemCanocValDesc>
</ElemCanocRec>
<ElemCanocRec>
<ElemCanocVal>Name</ElemCanocVal>
<ElemCanocValDesc>Name</ElemCanocValDesc>
</ElemCanocRec>
<ElemCanocRec>
<ElemCanocVal>Institution</ElemCanocVal>
<ElemCanocValDesc>Institution</ElemCanocValDesc>
</ElemCanocRec>
</ElemCanocArray>
</SvcDictInfoRec>
</SvcDictInfoArray>
</SvcDictSrchResponse>

```

SvcDict: DocImgSrch Example 2 (Without FilterCode)

Note

There is no corresponding sample response.

```

<SvcDictSrch>
<SvcDictName>DocImgSrch</SvcDictName>
<SvcDictType>Rq</SvcDictType>
<ElemName xsi:nil="true" />
<SvcDictFilterArray />
<IncXtendElemArray xsi:nil="true" />
</SvcDictSrch>

```

DocImgSrch

DocImgSrch serves two primary purposes: to perform a search in Synergy passing over the name of a Predefined Search and search arguments and to retrieve an item from Synergy using its UniqueIndex.

Tip

See the section in this guide about Vocabulary Mapping and Open Vocabulary for more information on using Vocabulary Mapping and Open Vocabulary with this function.

Predefined Search

In Banking cores, this search is used for Core Inquiry. In Credit Union cores, this search is used for Intelligent Search. This search is also used by Outside the Base (OTB) customers as Synergy is part of ProfitStars. This type of request does not typically include image retrieval.

Predefined Searches are configured in Synergy Web Client. Navigate to **Synergy Web Client > Manage > Predefined Searches**.

With Synergy R2021 and higher, you can search by document name using a predefined search.

UniqueIndex

Get properties for a specific Synergy item. This index can be a Document, Check, Report, or Document Tracking Checklist. This type of request typically includes image retrieval.

Synergy Modules

All modules - Document, Check, Report, and Document Tracking.

Synergy Security Consideration

The user must have proper Synergy Module access (Document, Document Tracking, Check, and/or Report).

Profile restriction is enforced for DocImgSrch. Results are not returned if they are not in the user's configured Profiles.

File Room is provided as part of the UniqueIndex value.

- If UniqueIndex value is not supplied, then the user's current (last logged on to) File Room is used for the Predefined Search.

- If UniqueIndex value is supplied but the user does not have access to the File Room, the 11006 error is returned.
- If UniqueIndex value is supplied and the user does have access, then the user's context (logon) is changed to the specified File Room.

Best Practices

To optimize results, consider this information when using DocImgSrch.

- Do not obtain items from Synergy without using a predefined search. Doing so may impact performance, create communication timeouts, result in too much data, or return no data.
- Work with the assigned Jack Henry resource to determine the predefined search name to use for each search use case.
- Each search option allows for a configurable Synergy predefined search name.

Synergy Image Retrieval

When you are using Synergy to retrieve images, results vary based on the module.

The Document module retrieves the entire document based on the files attributed to the Predefined Search or UniqueIndex request. See the section about DocImgFormat for more information.

The Check module retrieves the entire document based on the files attributed to the Predefined Search or UniqueIndex request. See the section about DocImgFormat for more information.

If Crop Zones are defined for the requested Cabinet/Type, only the cropped area defined in the crop zone is returned, if applicable. See the section about InclDocCropZoneType for more information.

The Report module retrieves either the single page requested, if the report is not statement-based, or retrieves the entire statement.

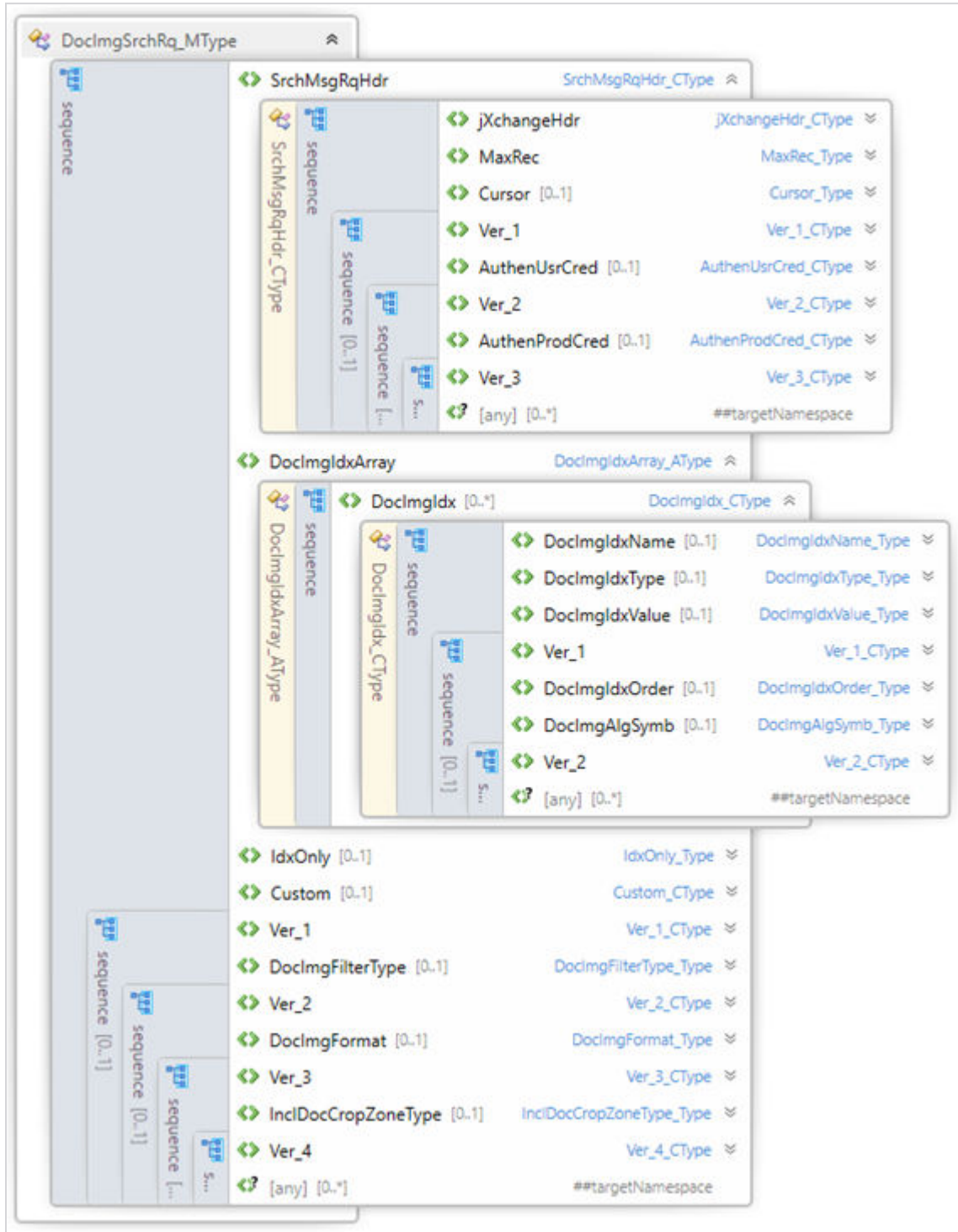
Note

Reports are always returned in PDF format.

Best Practice

Start with a predefined search that has the `IdxOnly` option set to *True*. This value returns a list of matching records with no images. Use this list to narrow down the search before calling `Uniqueindex` with the `IdxOnly` option set to *False*.

DocImgSrch Request Request



SrchMsgRqHdr

Information sent in the SrchMsgRqHdr is the same whether the request is Predefined Search or UniqueIndex.

Tip

See the section in this guide about Vocabulary Mapping and Open Vocabulary for more information on using Vocabulary Mapping and Open Vocabulary with this function.

jXchangeHdr

See the section about Overall Expectations.

MaxRec

Set this number to the maximum number of search results to return. It must be a positive number. Synergy cannot exceed the maximum results defined for the Organization.

Cursor

Set **Cursor** to the value obtained from the response to continue fetching search results. If the **Cursor** value provided in the request is not null or empty, Synergy looks it up in the dictionary and returns an error if the value is not found.

If the request sets the **Cursor** value to *null*, the response does not have the **Cursor** tag.

If the request sets the **Cursor** value to "", the response has an empty tag. For example, `<Cursor />`.

AuthenProdCred

Synergy does not use this optional element. Any values sent in a request are echoed back in the response header but not used by Synergy.

DocImglIdxArray

Information sent in this array depends on whether the request is a Predefined Search or a UniqueIndex.

Predefined Search

DocImglIdxName

When using Predefined Search, then this name specifies the name of the Index being passed as a parameter for the predefined search. This name may use either Vocabulary Mapping or the name as defined in Synergy.

If using Predefined Search and also use the optional Cabinet, then set both the DocImIdxType and DocImIdxName to Cabinet. Use the DocImIdxValue to specify which Cabinet. If you are using Predefined Search to search for a Synergy document name, then set both the DocImIdxType and DocImIdxName to *Name*. Use the DocImIdxValue to specify the Synergy document name.

DocImIdxType

When using Predefined Search, use this type to pass at least one Index. In addition to indexes, you may optionally specify Cabinet search parameters.

- If no Cabinet is specified in the request, then those Cabinets configured in the Predefined Search are used in the search.
- If a Cabinet is specified in the request and it is contained in the configured Predefined Search, then only the Cabinet specified is used in the search.
- If a Cabinet is specified in the request but it is not contained in the Predefined Search, then the search returns an error.

DocImIdxValue

When using Predefined Search, use this value to specify the value of the Index or Cabinet being passed as a parameter for the predefined search.

Index:

- Send unformatted values for indexes. For example, a Social Security Number must be passed in as 123456789 and not 123-45-6789.
- Date must be provided in one of the supported UTC date formats. See Overall Expectations/Request/Date Format for more information.

Cabinet:

Use DocImIdxValue to specify which Cabinet. The Cabinet value may use either Vocabulary Mapping or the Cabinet Name as defined in Synergy. The following are supported Cabinet values.

Core Account Types:

- Core Account Types:
 - T
 - X
 - S
 - ODP
 - L
 - D
 - B

- A Cabinet value defined in Synergy (like signature cards).
- A Cabinet value as set in Vocabulary Mapping (like 10).

Unique Index

The Unique Index is used to retrieve a specific Synergy item.

DocImgIdxType

When retrieving a particular Synergy item, this type must be set to UniqueIndex. If using UniqueIndex, then it is the only search argument used. Any other DocImgIdxType values are ignored.

DocImgIdxName

When retrieving a particular Synergy item, this name must be set to UniqueIndex. If using UniqueIndex, then it is the only search argument used. Any other DocImgIdxType values are ignored.

DocImgIdxValue

When retrieving a particular Synergy item, then this value is the value of that UniqueIndex corresponding to the Synergy item.

IdxOnly

Supported values for IdxOnly are the same whether the request is Predefined Search or UniqueIndex.

CAUTION

If *Null* or *False*, this parameter returns an image along with the property information per search result.

Set to *True* to return only property information per search result.

DocImgFilterType

Predefined Search

When using Predefined Search, use DocImgFilterType to specify the name of the Predefined Search.

UniqueIndex

When using UniqueIndex, do not pass any information in DocImgFilterType.

DocImgFormat

Supported values for DocImgFormat are the same whether the request is Predefined Search or UniqueIndex.

When using Predefined Search and specifying a DocImgFormat, an error is returned if all results cannot be converted to the specified DocImgFormat.

If IdxOnly is true, then the DocImgFormat value is ignored.

If IdxOnly is null or false but no DocImgFormat value is specified, then the items are returned in native format.

- Native is the format when the Document or Check was archived into Synergy.
- Synergy Reports always returns as a PDF. Synergy Reports retrieves either the single page requested, if the report is not statement-based or if it retrieves the entire statement.
- Document Tracking Checklists do not return images.

Effective with Synergy 2016.0, if IdxOnly is null or false, then you may indicate a retrieval format.

If the Document and/or Check was stored in Synergy as an image (such as JPG, GIF, PNG, TIFF, or IOCA) or PDF, then it can be converted to:

- PNG
- JPG
- PDF

Synergy does not support DocImgFormat conversion if the native format of the Document and/or Check is SFF. Synergy can convert Document and/or Check if the native format is EDM and PDF. An error is returned stating the item cannot be converted to the indicated format. Do not specify DocImgFormat in these cases to allow retrieval in native format.

InclDocCropZoneType

When InclDocCropZoneType is set to *True*, the crop zone defined is returned for the given Cabinet/Type.

If IdxOnly is set to *True*, this parameter is ignored.

For a given document:

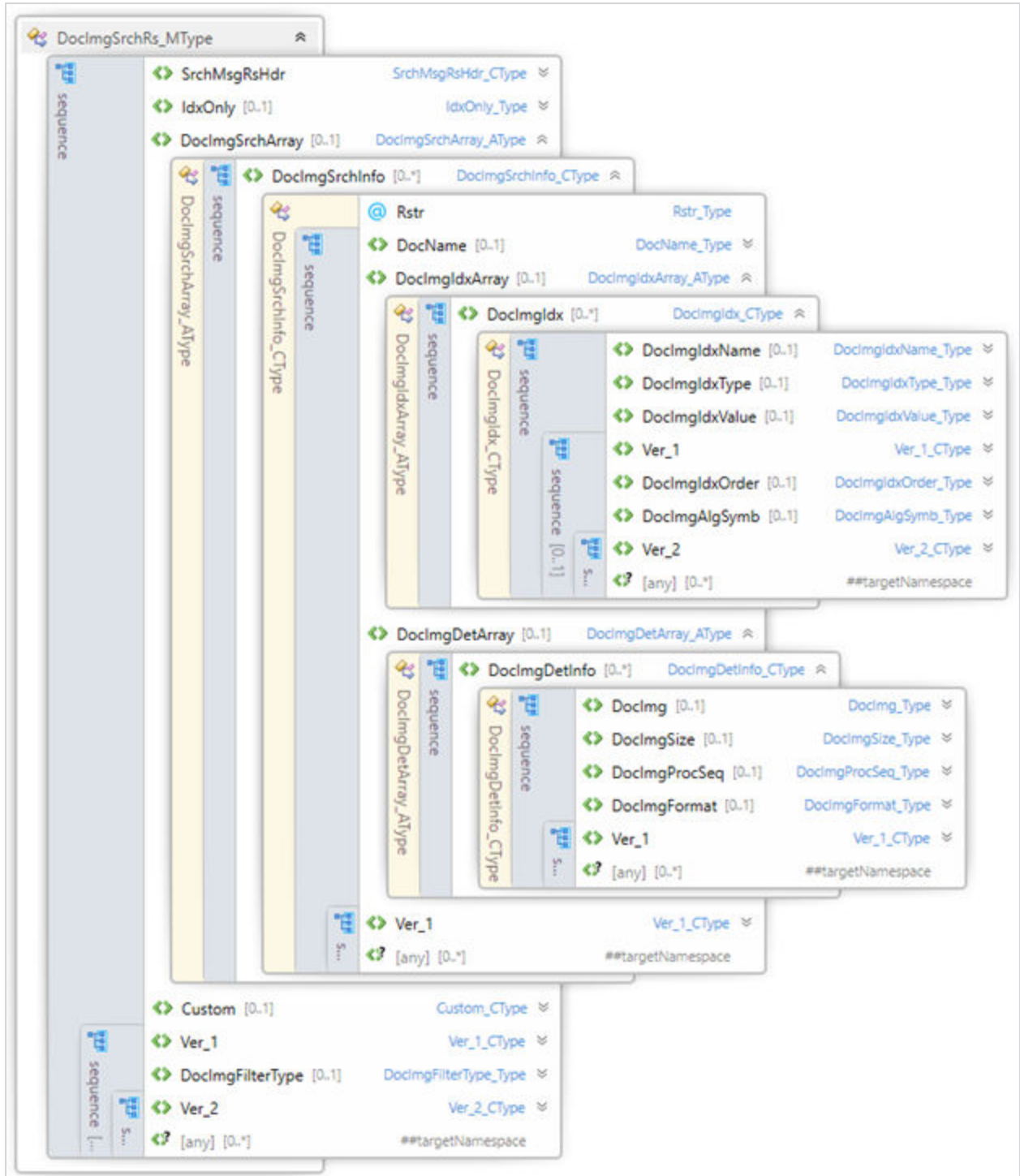
- If the crop zone page does not exist for the document, the entire document is returned.
- If the crop zone page is an .edm file type, then the full file is returned when specifying the native format. The full page is returned for non-native formats.

- If a crop zone is not defined for a given Cabinet/Type, the entire document is returned.

DocImgSrch Response

The following image is an example of a DocImgSrch response.

Response



SrchMsgRsHdr

Echoes information sent in the request.

IdxOnly

The IdxOnly element echoes information sent in the request.

DocImgSrchArray

Array of DocImgSrchInfo representing the found Synergy Items.

If there is more than one result, then the response is returned by Synergy Module and sorted, by default, within the following modules:

- Document module - Sorts descending order by DocId.
- Check module - Sorts descending order by DocId.
- Report module - Sorts descending order by LoadedDate.
- Checklist module - Sorts descending order by ChecklistId.

Effective with Synergy 2016.0, support was added to enable sorting by Index within a Synergy module.

This Sort Index is specified in an external tool (not via DocImgSrch) and therefore must be set up by Synergy personnel.

- The Index must exist within Synergy. There is no support of Vocabulary Mapping for the sort index.
- If the Index indicated is a string, then the sort applied is ascending.
- If the Index indicated is a numeric or date, then the sort applied is descending.
- If the Index does not exist, then the default sort per Synergy module is applied.

DocImgSrchInfo

Represents a found Synergy Item in the search results.

Rstr

Identifies restrictions on the Synergy Item. This value can be *No Access*, *Partial Access*, or *ReadWrite Access*.

- If *No Access*, then only the UniqueIndex is returned in DocImgIdxArray. Nothing is returned in DocImgDetArray if IdxOnly was null or False.
- If *Partial Access*, then properties are returned in DocImgIdxArray. If IdxOnly is null, False, or a Restricted Image, dummy TIF is returned.

DocName

CAUTION

DocName is deprecated in Synergy 2018.0. Find the information in the DocImIdxValue of the DocImIdxArray with DocImIdxType=Name and DocImIdxName=Name.

DocImIdxArray

Array of DocImIdx elements that list the properties. Properties returned on the item include Synergy meta information and customer-defined elements.

DocImIdxType

Describe the type of property such as **Name, Cabinet, Type, Application, Report, Index, DateGroup, DTProp**, etc.

DocImIdxName

Describes the name of the element whose type is specified in DocImIdxType. This is most useful if the type is DTProp or Index. Otherwise, this is the same as the DocImIdxType.

Note

The following applies to DocImIdxValue when both DocImIdxType=Name and DocImIdxName=Name.

- For a document or check, this is the document name. For example, *Signature Card*.
- For a report, this is the *Institution - Application - Report - DateGroup*. For example, *00 - 100114 - DD - DD5851P TRIAL/ACCT*.
- For a Document Tracking Checklist, this is the template name plus the common index names and values. For example, *Loan Checklist Loan Number 12345*.

DocImIdxValue

Contains the actual value of the property. Dates are returned in UTC format.

DocImIdxOrder

Contains the correct sequential order of the array.

DocImAlgSymb

This is used to search for a range of values instead of a specific value. It can be used for numeric searches and it is useful for date range searches.

Only applies to numeric and date Document Image Index Values. Contains one of the following canonical values:

- EQ = Equal
- GT = Greater Than

- GE = Greater Than and Equal to
- LT = Less Than
- LE = Less Than and Equal to
- NE = Not Equal

DocImgDetArray

Only applicable if the `IdxOnly` was set to *Null* or *False*. Returns one `DocImgDetInfo` per file.

CAUTION

Reports are always returned as PDF. Document Tracking Checklists do not return images.

DocImg

Contains base64 encoding of the bytes corresponding to the page of the Synergy Item.

DocImgSize

Specifies the size of `DocImg`.

DocImgProcSeq

Sequential number for the pages if multiple `DocImgDetInfo` are included. This starts with *1* and is incremented by one for each page.

DocImgFormat

Describes the format of the image.

DocImgFilterType

The `DocImgFilterType` element echoes information sent in the request.

DocImgSrch Example 1: Predefined Search

This request has `IdxOnly=true` so there is no `DocImgDetArray` in the response.

Note

The following applies to `DocImgIdxValue` when both `DocImgIdxType=Name` and `DocImgIdxName=Name`.

- For a document or check, this information is the document name. For example, *Signature Card*.
- For a report, this information is the *Institution - Application - Report - DateGroup*. For example, *00 - 100114 - DD - DD5851P TRIAL/ACCT*.
- For a Document Tracking Checklist, this information is the template name plus the common index names and values. For example, *Loan Checklist Loan Number 12345*.

Request

```
<DocImgSrch>
<DocImgIdxArray>
<DocImgIdx>
<DocImgIdxName>AccountNumber</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>0000000000</DocImgIdxValue>
</DocImgIdx>
</DocImgIdxArray>
<IdxOnly>>true</IdxOnly>
<Custom xsi:nil="true" />
<DocImgFilterType>qry_sig_id</DocImgFilterType>
<DocImgFormat />
</DocImgSrch>
```

Response

```
<DocImgSrchResponse>
<IdxOnly>>true</IdxOnly>
<DocImgSrchArray>
<DocImgSrchInfo Rstr="">
<DocImgIdxArray>
<DocImgIdx>
<DocImgIdxName>UniqueIndex</DocImgIdxName>
<DocImgIdxType>UniqueIndex</DocImgIdxType>
<DocImgIdxValue>unique value used to identify the item</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Name</DocImgIdxName>
<DocImgIdxType>Name</DocImgIdxType>
<DocImgIdxValue>DocumentName Here</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Cabinet</DocImgIdxName>
<DocImgIdxType>Cabinet</DocImgIdxType>
<DocImgIdxValue>SIGNATURE CARDS</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Type</DocImgIdxName>
<DocImgIdxType>Type</DocImgIdxType>
<DocImgIdxValue>SIGNATURE CARDS</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Institution</DocImgIdxName>
<DocImgIdxType>Institution</DocImgIdxType>
<DocImgIdxValue>00</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Authority</DocImgIdxName>
<DocImgIdxType>Authority</DocImgIdxType>
<DocImgIdxValue>123456789</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Created</DocImgIdxName>
<DocImgIdxType>Created</DocImgIdxType>
<DocImgIdxValue>2013-09-11 12:53:27Z</DocImgIdxValue>
```

```

</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Modified</DocImgIdxName>
<DocImgIdxType>Modified</DocImgIdxType>
<DocImgIdxValue>2013-09-11 12:53:27Z</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>DocID</DocImgIdxName>
<DocImgIdxType>DocID</DocImgIdxType>
<DocImgIdxValue>1878</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>ACCOUNT NUMBER</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>0000000000</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>NAME</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>Jane Doe</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>SSN</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>000123456</DocImgIdxValue>
</DocImgIdx>
</DocImgIdxArray>
</DocImgSrchInfo>
<DocImgSrchInfo Rstr="">
<DocImgIdxArray>
<DocImgIdx>
<DocImgIdxName>UniqueIndex</DocImgIdxName>
<DocImgIdxType>UniqueIndex</DocImgIdxType>
<DocImgIdxValue>unique value used to identify the item</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Name</DocImgIdxName>
<DocImgIdxType>Name</DocImgIdxType>
<DocImgIdxValue>Different DocName Here</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Cabinet</DocImgIdxName>
<DocImgIdxType>Cabinet</DocImgIdxType>
<DocImgIdxValue>SIGNATURE CARDS</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Type</DocImgIdxName>
<DocImgIdxType>Type</DocImgIdxType>
<DocImgIdxValue>SIGNATURE CARDS</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Institution</DocImgIdxName>
<DocImgIdxType>Institution</DocImgIdxType>
<DocImgIdxValue>00</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Authority</DocImgIdxName>
<DocImgIdxType>Authority</DocImgIdxType>
<DocImgIdxValue>123456789</DocImgIdxValue>

```

```

</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Created</DocImgIdxName>
<DocImgIdxType>Created</DocImgIdxType>
<DocImgIdxValue>2013-09-11 12:54:47Z</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Modified</DocImgIdxName>
<DocImgIdxType>Modified</DocImgIdxType>
<DocImgIdxValue>2013-09-11 12:54:47Z</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>DocID</DocImgIdxName>
<DocImgIdxType>DocID</DocImgIdxType>
<DocImgIdxValue>1880</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>ACCOUNT NUMBER</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>000000000</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>NAME</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>Jane Doe</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>SSN</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>000123456</DocImgIdxValue>
</DocImgIdx>
</DocImgIdxArray>
</DocImgSrchInfo>
</DocImgSrchArray>
<Custom xsi:nil="true" />
<DocImgFilterType>qry_sig_id</DocImgFilterType>
</DocImgSrchResponse>

```

DocImgSrch Example 2: Predefined Search (Cabinet Specified)

This request example includes optional *Cabinet* specification.

```

<DocImgSrch>
<DocImgIdxArray>
<DocImgIdx>
<DocImgIdxName>Cabinet</DocImgIdxName>
<DocImgIdxType>Cabinet</DocImgIdxType>
<DocImgIdxValue>S</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>AccountNumber</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>000000000</DocImgIdxValue>
</DocImgIdx>
</DocImgIdxArray>
<IdxOnly>true</IdxOnly>
<Custom xsi:nil="true" />
<DocImgFilterType>Provide Search Name Here</DocImgFilterType>

```

```
<DocImgFormat />
</DocImgSrch>
```

DocImgSrch Example 3: UniqueIndex without Image Retrieval

These XML requests and responses show an example of DocImgSrch using the UniqueIndex element without Image Retrieval.

Request

```
<DocImgSrch>
<DocImgIdxArray>
<DocImgIdx>
<DocImgIdxName>UniqueIndex</DocImgIdxName>
<DocImgIdxType>UniqueIndex</DocImgIdxType>
<DocImgIdxValue>unique value used to identify the item</DocImgIdxValue>
</DocImgIdx>
</DocImgIdxArray>
<IdxOnly>>true</IdxOnly>
<Custom xsi:nil="true" />
<DocImgFilterType xsi:nil="true" />
<DocImgFormat
```

Response

```
<DocImgSrchResponse>
<IdxOnly>True</IdxOnly>
<DocImgSrchArray>
<DocImgSrchInfo>
<DocImgIdxArray>
<DocImgIdx>
<DocImgIdxName>Name</DocImgIdxName>
<DocImgIdxType>Name</DocImgIdxType>
<DocImgIdxValue>CORRESPONDENCE</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>UniqueIndex</DocImgIdxName>
<DocImgIdxType>UniqueIndex</DocImgIdxType>
<DocImgIdxValue>unique value used to identify the item</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Cabinet</DocImgIdxName>
<DocImgIdxType>Cabinet</DocImgIdxType>
<DocImgIdxValue>CHECKING ACCOUNT</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Type</DocImgIdxName>
<DocImgIdxType>Type</DocImgIdxType>
<DocImgIdxValue>CORRESPONDENCE</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Institution</DocImgIdxName>
<DocImgIdxType>Institution</DocImgIdxType>
<DocImgIdxValue>00</DocImgIdxValue>
</DocImgIdx>
```

```

<DocImgIdx>
<DocImgIdxName>Authority</DocImgIdxName>
<DocImgIdxType>Authority</DocImgIdxType>
<DocImgIdxValue>123456</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>ACCOUNT NUMBER</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>000000000</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>DATE - DOCUMENT</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>2005-04-15</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>LOAN NUMBER</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>123456</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>NAME</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>SAM</DocImgIdxValue>
</DocImgIdx>
</DocImgIdxArray>
</DocImgSrchInfo>
</DocImgSrchArray>
<Custom xsi:nil="true" />
<DocImgFilterType xsi:nil="true" />
<DocImgFormat />
</DocImgSrchResponse>

```

DocImgSrch Example 4: UniqueIndex with Retrieval

These XML requests and responses show an example of DocImgSrch using the UniqueIndex element with retrieval.

Request

```

<DocImgSrch>
<DocImgIdxArray>
<DocImgIdx>
<DocImgIdxName> UniqueIndex </DocImgIdxName>
<DocImgIdxType>UniqueIndex</DocImgIdxType>
<DocImgIdxValue>unique value used to identify the item</DocImgIdxValue>
</DocImgIdx>
</DocImgIdxArray>
<IdxOnly>>false</IdxOnly>
<Custom xsi:nil="true" />
<DocImgFilterType xsi:nil="true" />
<DocImgFormat>PDF</DocImgFormat>
</DocImgSrch>

```

Response

```
<DocImgSrchResponse>
<IdxOnly>>false</IdxOnly>
<DocImgSrchArray>
<DocImgSrchInfo>
<DocImgIdxArray>
<DocImgIdx>
<DocImgIdxName />
<DocImgIdxType>UniqueIndex</DocImgIdxType>
<DocImgIdxValue>unique value used to identify the item</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Name</DocImgIdxName>
<DocImgIdxType>Name</DocImgIdxType>
<DocImgIdxValue>Jane Doe Credit Report</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Cabinet</DocImgIdxName>
<DocImgIdxType>Cabinet</DocImgIdxType>
<DocImgIdxValue>LOANS - MORTGAGE</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Type</DocImgIdxName>
<DocImgIdxType>Type</DocImgIdxType>
<DocImgIdxValue>CREDIT REPORT</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Institution</DocImgIdxName>
<DocImgIdxType>Institution</DocImgIdxType>
<DocImgIdxValue>01</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Authority</DocImgIdxName>
<DocImgIdxType>Authority</DocImgIdxType>
<DocImgIdxValue>9</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Created</DocImgIdxName>
<DocImgIdxType>Created</DocImgIdxType>
<DocImgIdxValue>2005-09-12 16:35:37Z</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>Modified</DocImgIdxName>
<DocImgIdxType>Modified</DocImgIdxType>
<DocImgIdxValue>2013-08-22 16:14:24Z</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>DocID</DocImgIdxName>
<DocImgIdxType>DocID</DocImgIdxType>
<DocImgIdxValue>686</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>ACCOUNT NUMBER</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>000000000</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
```

```

<DocImgIdxName>BORROWER</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>Jane Doe</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>DATE - DOCUMENT</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>2013-05-22</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>DISBURSEMENT DATE</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>2013-05-04</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>LOAN NUMBER</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>12345</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>PRINCIPLE AMOUNT</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>27438.36</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
<DocImgIdxName>SSN</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>000123456</DocImgIdxValue>
</DocImgIdx>
</DocImgIdxArray>
<DocImgDetArray>
<DocImgDetInfo>
<DocImg> will be much info here...</DocImg>
<DocImgSize>57263</DocImgSize>
<DocImgProcSeq>1</DocImgProcSeq>
<DocImgFormat>PDF</DocImgFormat>
</DocImgDetInfo>
</DocImgDetArray>
</DocImgSrchInfo>
</DocImgSrchArray>
<Custom xsi:nil="true" />
<DocImgFilterType xsi:nil="true" />
</DocImgSrchResponse>

```

DocImgSrch Example 5: Predefined Search

These XML requests and responses show an example of DocImgSrch using Predefined Search (search by Synergy Document Name).

Request

```

<DocImgSrch>
  <SrchMsgRqHdr>
    <jXchangeHdr>
      <AuditUsrId>UserName</AuditUsrId>
      <AuditWsId>MachineName</AuditWsId>
      <jXLogTrackingId>unique value used to identify the item</

```

```

jXLogTrackingId>
  <InstRtId>991234567</InstRtId>
  <InstEnv>PROD</InstEnv>
  <BusCorrelId>unique value used to identify the item</BusCorrelId>
  <ValidConsmName>JH</ValidConsmName>
  <ValidConsmProd />
</jXchangeHdr>
<MaxRec>100</MaxRec>
</SrchMsgRqHdr>
<DocImgIdxArray>
  <DocImgIdx>
    <DocImgIdxType>Name</DocImgIdxType>
    <DocImgIdxValue>COMPOUND PDF - 2 PDFS - 15 TOTAL PAGES</
DocImgIdxValue>
  <DocImgAlgSymb />
</DocImgIdx>
</DocImgIdxArray>
<IdxOnly>>false</IdxOnly>
<Custom xsi:nil="true" />
<DocImgFilterType>qry_demand_deposit</DocImgFilterType>
<DocImgFormat>PNG</DocImgFormat>
<InclDocCropZoneType>>false</InclDocCropZoneType>
</DocImgSrch>

```

Response

```

<DocImgSrchResponse>
  <SrchMsgRsHdr>
    <jXchangeHdr>
      <AuditUsrId>UserName</AuditUsrId>
      <AuditWsId>MachineName</AuditWsId>
      <Ver_1 />
      <jXLogTrackingId>unique value used to identify the item</
jXLogTrackingId>
    <Ver_2 />
    <InstRtId>991234567</InstRtId>
    <InstEnv>PROD</InstEnv>
    <Ver_3 />
    <BusCorrelId>unique value used to identify the item</BusCorrelId>
    <Ver_4 />
    <Ver_5 />
  </jXchangeHdr>
  <SentRec>1</SentRec>
  <MoreRec>False</MoreRec>
  <TotRec>1</TotRec>
</SrchMsgRsHdr>
<IdxOnly>>false</IdxOnly>
<DocImgSrchArray>
  <DocImgSrchInfo Rstr="">
    <DocName>COMPOUND PDF - 2 PDFS - 15 TOTAL PAGES</DocName>
    <DocImgIdxArray>
      <DocImgIdx>
        <DocImgIdxName />
        <DocImgIdxType>UniqueIndex</DocImgIdxType>
        <DocImgIdxValue>unique value used to identify the item</
DocImgIdxValue>
      </DocImgIdx>

```

```

<DocImgIdx>
  <DocImgIdxName>Cabinet</DocImgIdxName>
  <DocImgIdxType>Cabinet</DocImgIdxType>
  <DocImgIdxValue>CIF</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
  <DocImgIdxName>Type</DocImgIdxName>
  <DocImgIdxType>Type</DocImgIdxType>
  <DocImgIdxValue>GENERAL - CIF</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
  <DocImgIdxName>Institution</DocImgIdxName>
  <DocImgIdxType>Institution</DocImgIdxType>
  <DocImgIdxValue>61</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
  <DocImgIdxName>Authority</DocImgIdxName>
  <DocImgIdxType>Authority</DocImgIdxType>
  <DocImgIdxValue>123456789</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
  <DocImgIdxName>Name</DocImgIdxName>
  <DocImgIdxType>Name</DocImgIdxType>
  <DocImgIdxValue>COMPOUND PDF - 2 PDFS -15 TOTAL PAGES</
DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
  <DocImgIdxName>Created</DocImgIdxName>
  <DocImgIdxType>Created</DocImgIdxType>
  <DocImgIdxValue>2021-09-18 12:14:52Z</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
  <DocImgIdxName>Modified</DocImgIdxName>
  <DocImgIdxType>Modified</DocImgIdxType>
  <DocImgIdxValue>2022-04-02 13:42:40Z</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
  <DocImgIdxName>Pages</DocImgIdxName>
  <DocImgIdxType>Pages</DocImgIdxType>
  <DocImgIdxValue>15</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
  <DocImgIdxName>DocID</DocImgIdxName>
  <DocImgIdxType>DocID</DocImgIdxType>
  <DocImgIdxValue>12</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
  <DocImgIdxName>ACCT NO</DocImgIdxName>
  <DocImgIdxType>Index</DocImgIdxType>
  <DocImgIdxValue>00000000</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
  <DocImgIdxName>CIF NUMBER</DocImgIdxName>
  <DocImgIdxType>Index</DocImgIdxType>
  <DocImgIdxValue>00000000</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
  <DocImgIdxName>INDEX DATE</DocImgIdxName>
  <DocImgIdxType>Index</DocImgIdxType>

```

```

    <DocImgIdxValue>2009-02-12</DocImgIdxValue>
  </DocImgIdx>
  <DocImgIdx>
    <DocImgIdxName>NAME</DocImgIdxName>
    <DocImgIdxType>Index</DocImgIdxType>
    <DocImgIdxValue>USER 22</DocImgIdxValue>
  </DocImgIdx>
  <DocImgIdx>
    <DocImgIdxName>TAXID</DocImgIdxName>
    <DocImgIdxType>Index</DocImgIdxType>
    <DocImgIdxValue>00-0123456</DocImgIdxValue>
  </DocImgIdx>
</DocImgIdxArray>
</DocImgSrchInfo>
</DocImgSrchArray>
<Custom xsi:nil="true" />
<DocImgFilterType>qry_demand_deposit</DocImgFilterType>
</DocImgSrchResponse>

```

DocImgMod

Use DocImgMod to change property information for a Document or Check.

Tip

See the section in this guide about Vocabulary Mapping and Open Vocabulary for more information on using Vocabulary Mapping and Open Vocabulary with this function.

CAUTION

The image associated to the Document or Check cannot be modified.

Synergy Modules

Document and Check.

Synergy Security Considerations

To modify a document, the user must have the Document module and Refile Document authority.

To modify a check, the user must have the Check module and Refile Check authority.

Synergy Profile restriction is enforced for DocImgMod. The user cannot modify the item if Profiles do not allow access to it.

File Room is provided as part of the UniqueIndex value.

- If the user does not have access to the File Room specified in the UniqueIndex value, the 11006 error is returned.
- If the user does have access to the File Room specified in the UniqueIndex value, then the user's context (login) is changed.

DocImIdx

Use DocImIdx to specify the UniqueIndex of the document or check to be modified.

DocImIdxName

Set to UniqueIndex.

DocImIdxType

Set to UniqueIndex.

DocImIdxValue

Set to the value generated by Synergy as the UniqueIndex to represent the document or the check.

DocImModInfo

Use DocImModInfo to indicate what to modify for the document or check.

Use this entry to change the value on any of the following:

- Cabinet value.
- Type value.
- Name value.
- Indexes values.
- Institution value.
- Authority value.

A Synergy item can only have one value for **Cabinet**, **Type**, **Name**, **Institution**, and **Authority**.

A Synergy item may have many Indexes.

DocName

This information can be used to change the document name, but it is overridden if **Name** is also provided in the DocImIdxModArray. Specify the name in the DocImIdxModArray.

CAUTION

Synergy is deprecating support for DocName in Synergy 2018.0.

DocImAuxDesc

This information can be used to change the document type, but it is overridden if **Type** is also provided in the DocImIdxModArray. Specify the type in the DocImIdxModArray.

CAUTION

Synergy is deprecating support for DocImAuxDesc in Synergy 2018.0.

DocImgEffDt

Although defined in the contract, Synergy does not support this value. This value is ignored, if provided.

DocImgIdxModArray

Array of DocImgIdx elements that specify the information to be modified. Per DocImgIdx, specify a DocImgIdxType, DocImgIdxName, and DocImgIdxValue. The **Cabinet**, **Type**, **Name**, **Institution**, and **Authority** can only be specified once. Only Index may be specified more than one time where the actual index name would be specified in the DocImgIdxName element.

DocImgIdxType

Can be set to one of the following: *Cabinet*, *Type*, *Index*, *Name*, *Institution*, or *Authority*.

DocImgIdxName

If the DocImgIdxType is *Cabinet*, *Type*, *Name*, *Institution*, or *Authority*, then its DocImgIdxName is the same (*Cabinet*, *Type*, *Name*, *Institution*, or *Authority*). If the DocImgIdxType is *Index*, then use DocImgIdxName to identify which Index such as *AccountNumber* or *TaxID*.

DocImgIdxValue

Specifies the value of the element such as *Name*, *Type*, *Cabinet*, *Institution*, *Authority*, or **Index**. An empty value is ignored. Passing an empty value does not wipe out/clear/delete the value in Synergy. An entry in the SynJxGateway log file is added when an empty value is encountered and ignored. You cannot remove the *Name*, *Type*, *Cabinet*, *Institution*, or *Authority* value. You can change this value, but it cannot be wiped out/set to *NULL*.

If not required, an Index value can be removed by using the JHANull attribute. To remove an index value, set the JHANull attribute to true (JHANull="true").

Some helpful hints about Index values:

- Send unformatted values. For example, a Social Security Number must be sent as *123004567*, not *123-00-4567*.
- Specify DateTime as UTC. Synergy accepts these formats:
 - *2013-01-09 00:00:00.000000000-04:00*
 - *2013-05-11T15:02Z*
 - *2013-05-11T11:02-04:00*
- If the Index is set up as multi-value in Synergy, then repeat the DocImgIdxType and DocImgIdxName for each desired DocImgIdxValue. These values do not need to be sequential in the array.

- If JHANull was used to wipe out an Index value, it is returned in the response as ****Deleted.****
- If the modified value is the same as the previous value, it is returned because it was part of the incoming request.
- If the item as specified as part of the DocImgIdxModArray was not applicable for the UniqueIndex of the item in the modification request, it is ignored. It is not returned in the list of DocImgIdxModArray of the response.

DocImgMod Example

These XML requests and responses show an example of DocImgMod.

Request

```
<DocImgMod>
<ErrOvrRdInfoArray xsi:nil="true" />
<DocImgIdxArray>
<DocImgIdx>
<DocImgIdxType>
<DocImgIdxType>UniqueIndex</DocImgIdxType>
<DocImgIdxValue>unique value used to identify the item</DocImgIdxValue>
</DocImgIdx>
</DocImgIdxArray>
<DocImgModInfo>
<DocImgIdxModArray>
<DocImgIdx>
<DocImgIdxName>LOAN NUMBER</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>1042016</DocImgIdxValue>
</DocImgIdx>
</DocImgIdxModArray>
</DocImgModInfo>
<Dlt xsi:nil="true" />
</DocImgMod>
```

Response

```
<DocImgModResponse>
<DocImgModInfo>
<DocImgIdxModArray>
<DocImgIdx>
<DocImgIdxName>LOAN NUMBER</DocImgIdxName>
<DocImgIdxType>Index</DocImgIdxType>
<DocImgIdxValue>1042016</DocImgIdxValue>
</DocImgIdx>
</DocImgIdxModArray>
<Custom xsi:nil="true" />
</DocImgModInfo>
<RsStat>Success</RsStat>
<Custom xsi:nil="true" />
</DocImgModResponse>
```

DocImgCrossIdxAdd

Use DocImgCrossIdxAdd to add a metadata set for a document.

Tip

See the section in this guide about Vocabulary Mapping and Open Vocabulary for more information on using Vocabulary Mapping and Open Vocabulary with this function.

Synergy Module

Document

Synergy Security Considerations

To cross index a document, the user must have the Document module and Cross Index authority.

Synergy Profile restriction is enforced for DocImgCrossIdxAdd. The user cannot create the item if Storage Profiles do not allow access to it.

File Room is provided as part of the UniqueIndex value.

- If the user does not have access to the File Room specified in the UniqueIndex value, the 11006 error is returned.
- If the user does have access to the File Room specified in the UniqueIndex value, then the user's context (login) is changed.

UniqueIndex

Use UniqueIndex to indicate which specific item to Cross Index.

DocImgCrossIdxRec

Use this entry to specify the value or values on any of the following:

- Cabinet
- Type
- Name
- Indexes
- Institution
- Authority

A Synergy item can only have one value for **Cabinet, Type, Name, Institution,** and **Authority**. A Synergy item may have many Indexes.

DocName

This information can be used to specify the document name, but it is overridden if **Name** is also provided in the DocImglDxArray. Specify the name in the DocImglDxArray.

CAUTION

Synergy ended support for DocName in Synergy R2018.0.

DocImglAuxDesc

You can use this information to change the document type, but it is overridden if **Type** is also provided in the DocImglDxModArray. Specify the type in the DocImglDxModArray.

CAUTION

Synergy is ended support for DocImglAuxDesc in Synergy R2018.0

DocImglDxArray

This information is an array of DocImglDx elements that specify the information to add. Per DocImglDx, specify a DocImglDxType, DocImglDxName, and DocImglDxValue. The **Cabinet, Type, Name, Institution, and Authority** can only be specified once. Only Index may be specified more than one time where the actual index name would be specified in the DocImglDxName element.

DocImglDxType

Set to one of the following: *Cabinet, Type, Index, Name, Institution, or Authority*.

DocImglDxName

If the DocImglDxType is *Cabinet, Type, Name, Institution, or Authority*, then its DocImglDxName is the same value. If the DocImglDxType is *Index*, then use DocImglDxName to identify which index such as AccountNumber or TaxID.

DocImglDxValue

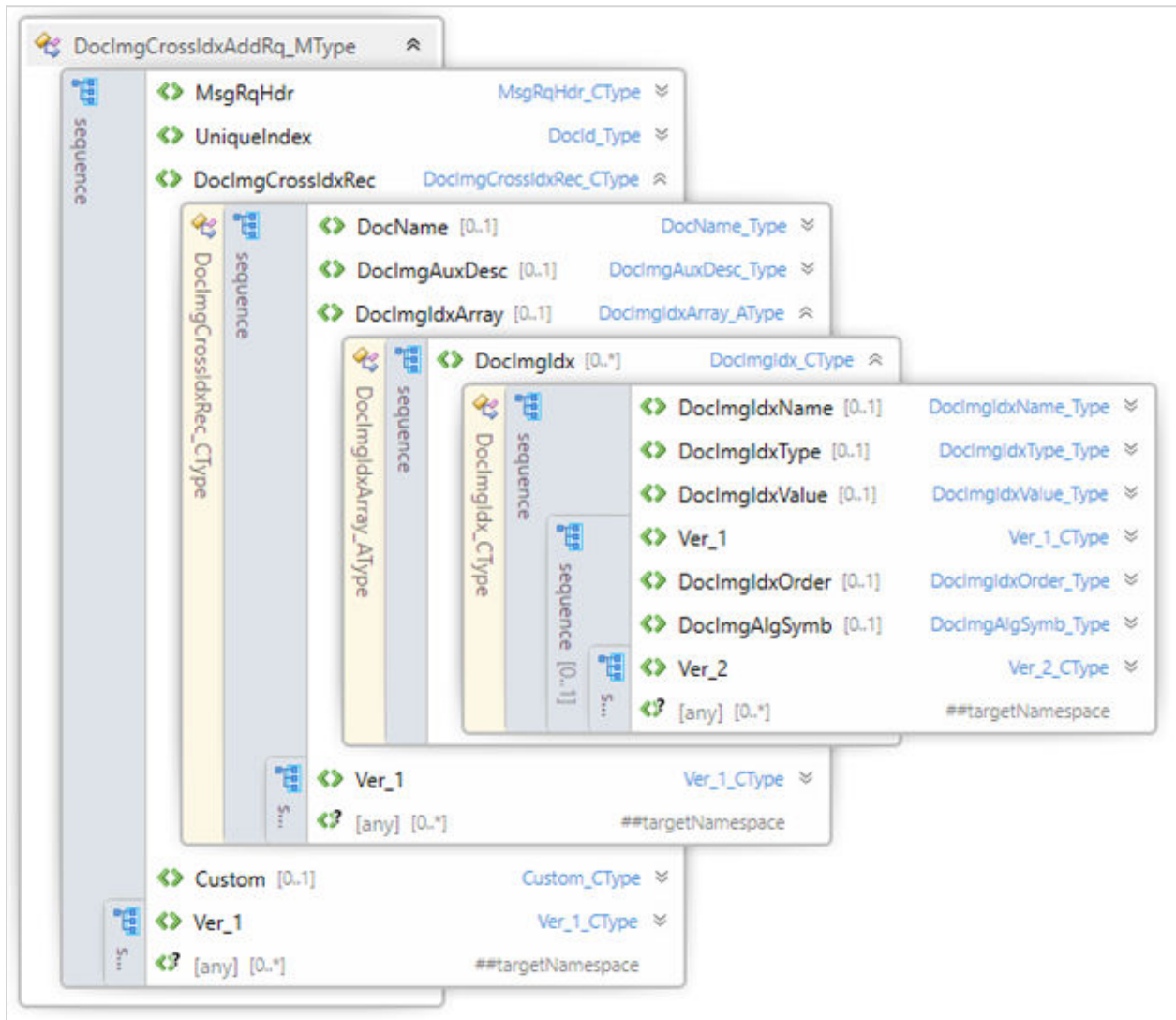
Specifies the value of the element such as Name, Type, Cabinet, Institution, Authority, or Index. Here is some helpful information about Index values:

- Send unformatted values. For example, send a Social Security Number as *123456789*, not *123-45-6789*.
- **DateTime** must be specified as UTC. Synergy accepts the following formats:
 - *2013-01-09 00:00:00.000000000-04:00*
 - *2013-05-11T15:02Z*
 - *2013-05-11T11:02-04:00*
- If the Index is set up as multi-value in Synergy, then repeat the DocImglDxType and DocImglDxName for each desired DocImglDxValue. These entries do not need to be sequential in the array.

DocImgCrossIdxAdd Request

The following image is an example of a DocImgCrossIdxAdd request.

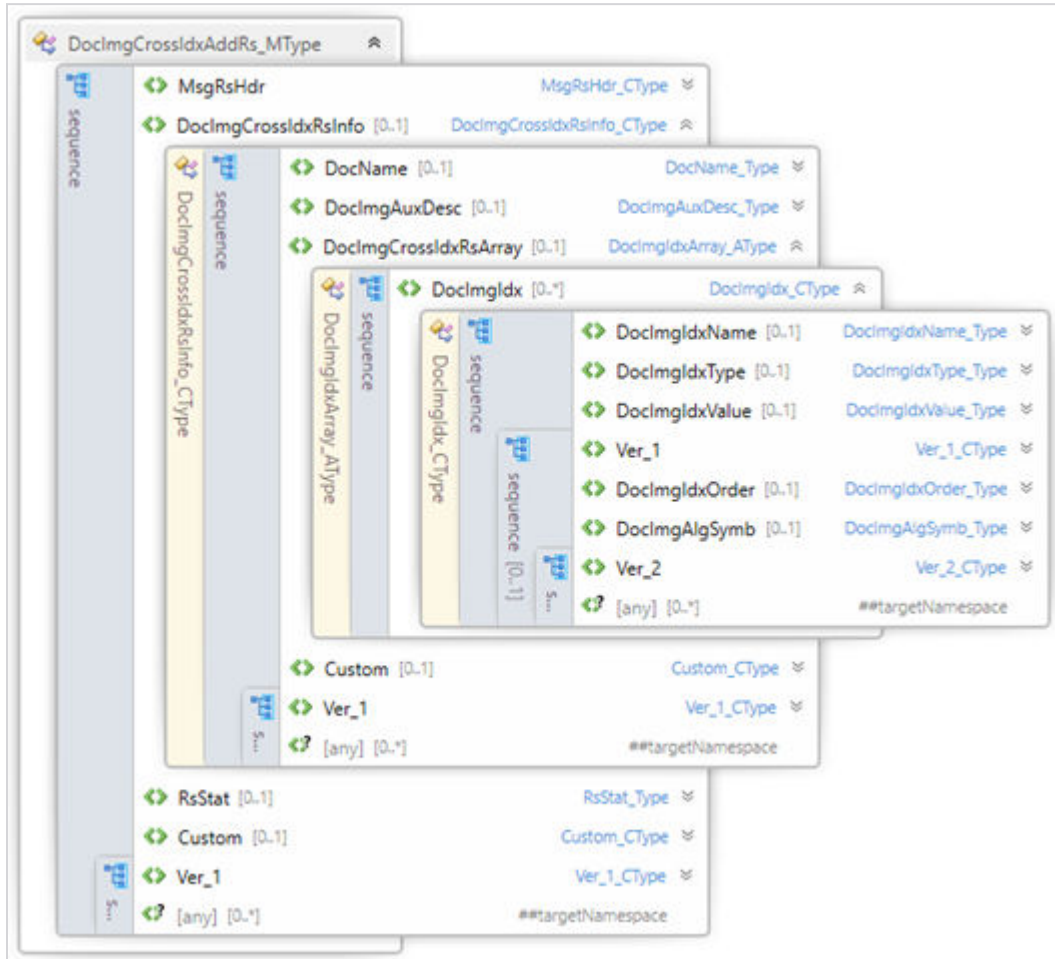
Request



DocImgCrossIdxAdd Response

The following image is an example of a DocImgCrossIdxAdd response.

Response



DocImgCrossIdxRsInfo

Use the DocImgCrossIdxRsArray to review a list of modifications as requested for the UniqueIndex.

DocImgCrossIdxRsArray

Returns a list of cross-indexed metadata as requested for the UniqueIndex.

DocImgCrossIdxRsArray Example Request

The following image is an example of a DocImgCrossIdxRsArray request.

```
<UniqueIndex>unique value used to identify the item</UniqueIndex>
<DocImgCrossIdxRec>
  <DocName>BOARDING DATA SHEET</DocName>
  <DocImgAuxDesc>BOARDING DATA SHEET</DocImgAuxDesc>
  <DocImgIdxArray>
    <DocImgIdx>
      <DocImgIdxType>Cabinet</DocImgIdxType>
      <DocImgIdxValue> LOANS - AUTO</DocImgIdxValue>
    </DocImgIdx>
  </DocImgIdxArray>
</DocImgCrossIdxRec>
```

```

    <DocImgIdx>
      <DocImgIdxType>Type</DocImgIdxType>
      <DocImgIdxValue>BOARDING DATA SHEET</DocImgIdxValue>
    </DocImgIdx>
    <DocImgIdx>
      <DocImgIdxType>Institution</DocImgIdxType>
      <DocImgIdxValue>00</DocImgIdxValue>
    </DocImgIdx>
    <DocImgIdx>
      <DocImgIdxType>Authority</DocImgIdxType>
      <DocImgIdxValue>123</DocImgIdxValue>
    </DocImgIdx>
    <DocImgIdx>
      <DocImgIdxType>Name</DocImgIdxType>
      <DocImgIdxValue>BOARDING DATA SHEET</DocImgIdxValue>
    </DocImgIdx>
    <DocImgIdx>
      <DocImgIdxName>ACCOUNT NUMBER</DocImgIdxName>
      <DocImgIdxType>Index</DocImgIdxType>
      <DocImgIdxValue><insert appropriate value here></
DocImgIdxValue>
    </DocImgIdx>
  </DocImgIdxArray>
</DocImgCrossIdxRec>

```

DocImgCrossIdxRsArray Example Response

The following image is an example of a DocImgCrossIdxRsArray response.

If the item is specified as part of the DocImgIdxArray was not applicable for the UniqueIndex of the item in the request, it is ignored. It is not returned in the list of DocImgIdxArray of the response.

```

<DocImgCrossIdxRsInfo>
  <DocName>My cross indexed doc</DocName>
  <DocImgAuxDesc>BOARDING DATA SHEET</DocImgAuxDesc>
  <DocImgCrossIdxRsArray>
    <DocImgIdx>
      <DocImgIdxName>Cabinet</DocImgIdxName>
      <DocImgIdxType>Cabinet</DocImgIdxType>
      <DocImgIdxValue>LOANS - AUTO</DocImgIdxValue>
    </DocImgIdx>
    <DocImgIdx>
      <DocImgIdxName>Type</DocImgIdxName>
      <DocImgIdxType>Type</DocImgIdxType>
      <DocImgIdxValue>BOARDING DATA SHEET</DocImgIdxValue>
    </DocImgIdx>
    <DocImgIdx>
      <DocImgIdxName>Institution</DocImgIdxName>
      <DocImgIdxType>Institution</DocImgIdxType>
      <DocImgIdxValue>00</DocImgIdxValue>
    </DocImgIdx>
    <DocImgIdx>
      <DocImgIdxName>Authority</DocImgIdxName>
      <DocImgIdxType>Authority</DocImgIdxType>
      <DocImgIdxValue>123</DocImgIdxValue>

```

```

</DocImgIdx>
<DocImgIdx>
  <DocImgIdxName>Name</DocImgIdxName>
  <DocImgIdxType>Name</DocImgIdxType>
  <DocImgIdxValue>BOARDING DATA SHEET</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
  <DocImgIdxName>Created</DocImgIdxName>
  <DocImgIdxType>Created</DocImgIdxType>
  <DocImgIdxValue>2022-04-01 16:41:41Z</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
  <DocImgIdxName>Modified</DocImgIdxName>
  <DocImgIdxType>Modified</DocImgIdxType>
  <DocImgIdxValue>2022-04-01 16:41:41Z</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
  <DocImgIdxName>Pages</DocImgIdxName>
  <DocImgIdxType>Pages</DocImgIdxType>
  <DocImgIdxValue>1</DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
  <DocImgIdxName>DocID</DocImgIdxName>
  <DocImgIdxType>DocID</DocImgIdxType>
  <DocImgIdxValue><document ID></DocImgIdxValue>
</DocImgIdx>
<DocImgIdx>
  <DocImgIdxName>ACCOUNT NUMBER</DocImgIdxName>
  <DocImgIdxType>Index</DocImgIdxType>
  <DocImgIdxValue><insert arbitrary value here></DocImgIdxValue>
</DocImgIdx>
  <DocImgIdxName />
  <DocImgIdxType>UniqueIndex</DocImgIdxType>
  <DocImgIdxValue> uniquevalue used to identify the item </
DocImgIdxValue>
  </DocImgIdx>
</DocImgCrossIdxRsArray>
<Custom xsi:nil="true" />
</DocImgCrossIdxRsInfo>

```

DocImgAttachInq

Use DocImgAttachInq to pass tabular data from a Semantik Invoice to jhaEnterprise Workflow.

Synergy Module

Document

Synergy Security Considerations

The user must have proper Synergy Module access (Document).

Profile restriction is enforced for DocImgAttachInq. Results are not returned if they are not in the user's configured Profiles.

File Room is provided as part of the UniqueIndex value.

- If the user does not have access to the File Room, the 11006 error is returned.
- If the user does have access, then the user's context (logon) is changed to the specified File Room.

DocId

Get attachment information for a specific Synergy document. Use the same format as UniqueIndex.

DocImgAttachInqArray

Array of attachment information related to the specified document.

DocImgAttachInqInfo

Information for a specific attachment.

AttachId

Unique ID for the attachment.

AttachDesc

Description of the type of attachment data being sent.

Note

Semantik Invoice Tabular Data is the only attachment description that is returned in this field.

AttachName

Unique name type of attachment data being sent.

Note

SEMANTIK.TABLE.JSON is the only attachment description that is returned in this field.

AttachPkg

Data for a given attachment.

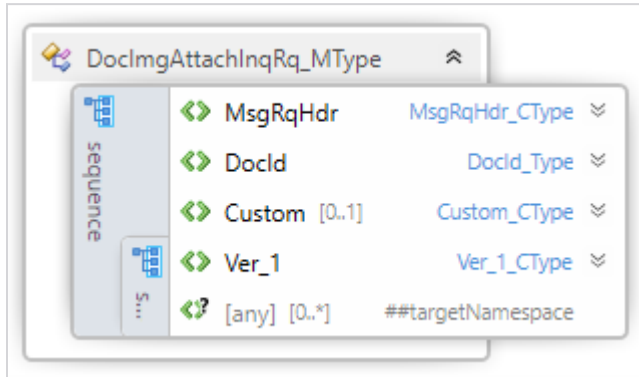
Note

Only Semantik tabular data in JSON format is returned in this field. A sample of this type of request appears in this document in the section about Sample JSON Tabular Data.

DocImgAttachInq Request

The following image is an example of a DocImgAttachInq request.

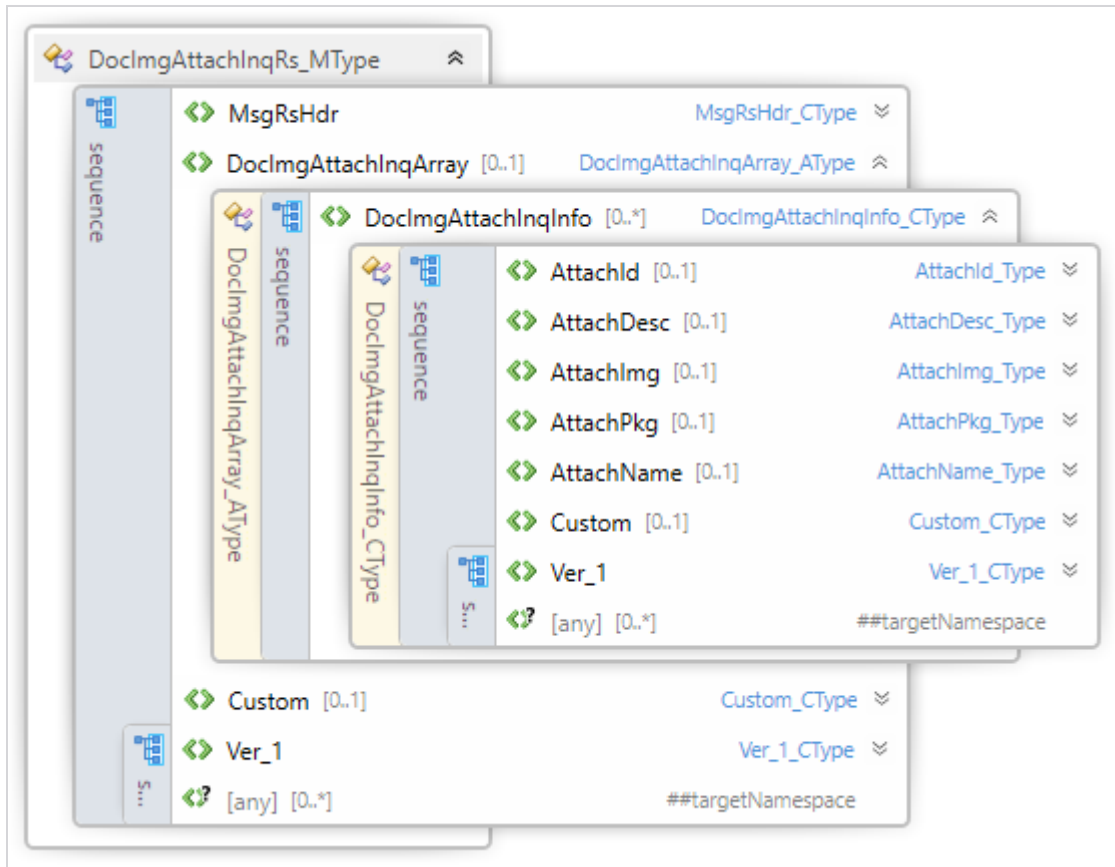
Request



DocImgAttachInq Response

The following image is an example of a `DocImgAttachInq` response.

Response



DocImgAttachInq Examples

The following section provides examples of a request and response messages for DocImgAttachInq.

Request

```
<DocImgAttachInq>
  <DocId>unique value used to identify the item</DocId>
  <Custom xsi:nil="true" />
</DocImgAttachInq>
```

Response

```
<DocImgAttachInqResponse >
  <DocImgAttachInqArray>
    <DocImgAttachInqInfo>
      <AttachId><unique ID for the attachment></AttachId>
      <AttachDesc>Semantik Invoice Tabular Data</AttachDesc>
      <AttachPkg>
<unique attachment data for the attachment>
</AttachPkg>
      <AttachName>SEMANTIK.TABLE.JSON</AttachName>
      <Custom xsi:nil="true" />
    </DocImgAttachInqInfo>
  </DocImgAttachInqArray>
  <Custom xsi:nil="true" />
</DocImgAttachInqResponse>
```

Sample JSON Tabular Data

The following is an example of JSON tabular data returned for DocImgAttachInq requests for Semantik Invoice tabular data.

```
{
  "documentId": <unique document ID as assigned by Semantik>,
  "tableId": <unique table ID as assigned by Semantik>,
  "name": "",
  "rows": [
    {
      "Item Number": null,
      "Description": null,
      "Quantity": 1,
      "Unit Price": 5000,
      "Total": 5000
    },
    {
      "Item Number": null,
      "Description": null,
      "Quantity": 1,
      "Unit Price": 500,
      "Total": 500
    }
  ]
}
```

```
]
}
```

Fault or Error Responses

Available with Synergy 2013.0 GA, if the response **RsStat**=*Failure*, it contains one of the 1100x messages.

Note

Synergy does not support IP v6. Synergy has a 50-megabyte size limit on DocImgAdd.

Note the following fault or error response best practices:

- Record the errors, and clearly identify the failure message and source of the problem in the error. For example, note the calling application, consumer, or provider.
- If it makes sense to do so, surface the error to the user.
- Ensure that the error messages are accessible to customer administrators.

11001: Cannot Process Request Due to Missing Required Data For...

This fault indicates that a required element is missing in the request. The required element may be optional by contract but required by Synergy.

Example

SynJxGateway Fault (11001): Cannot process request due to missing required data for: InstRtId has not been specified.

11002: This User Does Not Have Access to Synergy

This error appears if the routing number ID has not been configured in Synergy, if sign-in failed, if the user does not exist in Synergy, or if there are no Synergy licenses available. This error is also returned if the information provided in AuthenUserCred cannot be authenticated.

Example

The following reasons can be returned with the *This user does not have access to Synergy* error:

- *Invalid IMS token certificate.*
- *Expired IMS token.*
- *IMS Token does not have credentials that Synergy can use.*
- *IP address not configured.*
- *Routing Number is not allowed from requesting IP.*

11004: An Internal Application Server Error Has Occurred

Result from internal Synergy issue like failure to connect to the database. Additional details are available in the Synergy logs.

Examples

DocImgSrch request sent with bad index name/bad index value.

DocImgSrch request sent with unmatched **Predefined Search** name.

11005: Cannot Perform Action Due to Invalid...

Data passed cannot be converted or parsed because it is an invalid argument.

Examples

- DocImgAdd request sent with missing type.
- DocImgAdd request but no institution specified nor defaulted.
- DocImgSrch request (**Predefined Search**) sent without any indexes.
- DocImgSrch request sent with negative MaxRec value.
- SvcDict: DocImgAdd sent with invalid FilterCode.

11006: This User Cannot Perform This Action in Synergy Due to...

The user exists and was authenticated but cannot perform the requested action.

Examples

Lack of Synergy Authority. For example, general search or refile.

No access to the item based on Module, File Room, Profile, View Authority (1-9, G,S,P).

11007: The Request is Invalid Because the Synergy Item is Not a Document...

DocImgMod only allows modification of a *Document* or *Check*. It does not allow modification of other item types like *Report*.

11008: The Synergy Item Does Not Exist to Enable Modification

Item specified in the DocImgMod Request no longer exists in Synergy. It may have been deleted by a user or a retention policy.

11009: The Synergy Item Cannot be Converted Into the Requested Format

Source item does not support conversion to .jpg or PDF or .png format. This conversion can occur if the document source is EDM (.doc, .docx, .xls, .xlsx, etc.) or SFF

and the DocImgSrch request specifies a format. Synergy does not support converting these types.

11010: User Not Sent or Not Found

This fault is only returned on an UsrOperInq response if one of the following occurs.

- There was no value provided in AuthenUserCred.
- The user specified in AuthenUserCred could not be found in Synergy.

Synergy Terminology

The following are important terms used in Synergy and throughout this document.

Application

Application is one aspect of Report classification in Synergy. Reports are identified by what Synergy refers to as the Big4: Application, Report, Institution, and DateGroup.

Application is not sent in any request.

Application can be returned in the response of DocImgSrch or SvcDict: DocImgSrch.

Authority (Module)

A Module Authority is a permission or right granted to a Synergy user. Specific authorities are required to add a document (DocImgAdd, Name: Archive Document), modify a Document (DocImgMod, Name: Refile Document), or modify a Check (DocImgMod, Name: Refile Check).

Module Authority is not contained in any request or response but understanding that it is imperative if 11006 response is returned.

Authority (View)

A View Authority is an access level granted to a Synergy item (1–9 for Document or Check, General/Special/Privileged for a Report). The user must have a matching view authority to modify the item (DocImgMod) or retrieve the item (DocImgSrch), or a 11006 error is returned.

View Authority can be sent in the request for DocImgAdd or DocImgMod.

View Authority can be returned in the response of DocImgSrch, either SvcDict (SvcDict: DocImgAdd or SvcDict: DocImgSrch), DocImgAdd, or DocImgMod.

Understanding this information is imperative if a 11006 response is returned. The user must have a matching view authority to modify an item (DocImgMod) or retrieve an item (DocImgSrch, UniqueIndex request).

Cabinet

One aspect of Document and Check classification in Synergy. Documents and Checks are stored in Cabinets. A Cabinet may hold many Types. The maximum length on Cabinet Name is 80 characters.

Cabinet can be sent in the request for DocImgAdd, DocImgMod, or DocImgSrch.

Cabinet can be returned in the response of DocImgSrch, either SvcDict (SvcDict: DocImgAdd or SvcDict: DocImgSrch), DocImgAdd, or DocImgMod.

DateGroup

DateGroup is one aspect of Report classification in Synergy. Reports are identified by what Synergy refers to as the Big4 – Application, Report, Institution, and DateGroup.

DateGroup is not sent in any request.

DateGroup can be returned in the response of DocImgSrch or SvcDict: DocImgSrch.

DTProp

DTProp is a Document Tracking property, specific to a Document Tracking Checklist item.

DTProp is not sent in any request.

DTProp can be returned in the response of DocImgSrch or SvcDict: DocImgSrch.

File Room

A File Room is a physical database separation used by Synergy. A user may have access to more than one File Room. File Room is part of the UniqueIndex. If a UniqueIndex is specified in a request (DocImgSrch, DocImgMod), then the user must have access to that File Room, or a 11006 error is returned.

Index

An Index is metadata on a Document, Check, or Report. Documents and Checks require at least one Index to store. Reports can be loaded with the Big4 (Application, Report, Institution, and DateGroup) and no indexes. The maximum length on an index name is 80 characters. At least one index must be sent in the request for DocImgAdd.

An Index may be sent in the request for DocImgSrch or DocImgMod.

An Index is returned in the response of DocImgSrch, SvcDict, SvcDict: DocImgAdd, SvcDict: DocImgSrch, and DocImgAdd.

An Index may be returned in the response of DocImgMod.

Institution

Note

A Synergy Institution is not the same as an Institution.

An Institution in Synergy is an aspect of item classification. Reports are identified by what Synergy refers to as the Big4 – Application, Report, Institution, and DateGroup. An Institution is also an identifying item on a Document or Check. Synergy Institution is not necessarily a one-to-one correlation to the Routing Number ID (or ABA Number). More than one Synergy Institution may be associated to the Routing Number ID (or ABA Number). If that is the case, then Synergy best practice recommendation is to specify the Institution value.

An institution can be sent in the request for DocImgAdd or DocImgMod.

An institution can be returned in the response of DocImgSrch, either SvcDict (SvcDict: DocImgAdd or SvcDict: DocImgSrch), DocImgAdd, or DocImgMod.

Module

Synergy contains four separate modules: Document, Check, Report, and Document Tracking. See the specific request to see which modules it supports.

Module is not contained in any request or response. It is imperative that you understand this concept, in case a 11006 response is returned.

Predefined Search

A Predefined Search is a pre-built search as configured in Synergy System Administration by system administrators or Synergy personnel. From within Synergy System Administration, navigate to **Integration > Predefined Search Maintenance**.

In banking cores, Predefined Search is used for Core Inquiry. In Credit Union cores, Predefined Search is used for Intelligent Search. Predefined Search is also used by Outside the Base (OTB) customers because Synergy is part of ProfitStars. The maximum length of a Predefined Search name is 100 characters.

Predefined Search can be sent in the request of DocImgSrch.

Profile

A Profile is a security aspect in Synergy that controls what the user can access, typically based on Cabinet/Type or Application/Report location.

Profile is not contained in any request or response but understanding that it is imperative, in case a 11006 response is returned.

Report

A report is one aspect of report classification in Synergy. Reports are identified by what Synergy refers to as the Big4 – Application, Report, Institution, and DateGroup.

Report is not sent in any request.

Report can be returned in the response of DocImgSrch or SvcDict: DocImgSrch.

Type

A type is one aspect of document and check classification in Synergy. A document or check belongs to a single type. A type has at least one Index, but it likely has more. The maximum length on a type name is 80 characters.

Type must be sent in the request for DocImgAdd.

Type can be sent in the request for DocImgMod.

Type is returned in the response of DocImgSrch, SvcDict, SvcDict: DocImgAdd, SvcDict: DocImgSrch, or DocImgAdd.

Type may be returned in the response of DocImgMod.

UniqueIndex

A UniqueIndex is a Synergy-generated complex value used to represent a specific Synergy item.

UniqueIndex must be sent in the request for DocImgMod.

UniqueIndex can be sent in the request for DocImgSrch.

UniqueIndex is returned in the response of DocImgSrch, DocImgMod, and DocImgAdd.

Vocabulary Mapping and Open Vocabulary

Vocabulary Mapping is an optional configuration setting in Synergy System Administration (Desktop Client). It correlates an incoming Index and/or Cabinet value to its Synergy counterpart like an incoming AccountNumber from a core to the Index defined in Synergy as **Account Number**.

Open Vocabulary mapping is available in **Synergy System Administration (Web Client) > Maintenance > Open Vocabulary**. The Open Vocabulary feature allows administrators to manage Open Vocabulary mapping with third-party entities.

Tip

See the section in this guide about Vocabulary Mapping and Open Vocabulary for more information.