Exact Synergy: Workflow Management

"Automating your daily operations doesn't just eliminate waste and paperwork, it puts power and value into everything you do."

Corporate workflow is the backbone of every company. It is how the organizational efforts are achieved and how the overall strategies are met. Consisting of a complex web of customer orders, engineering changes, HR requests, sales calls or marketing events, the hundreds, if not thousands, of dependent and interrelated business processes involved in standard corporate operations is monumental.
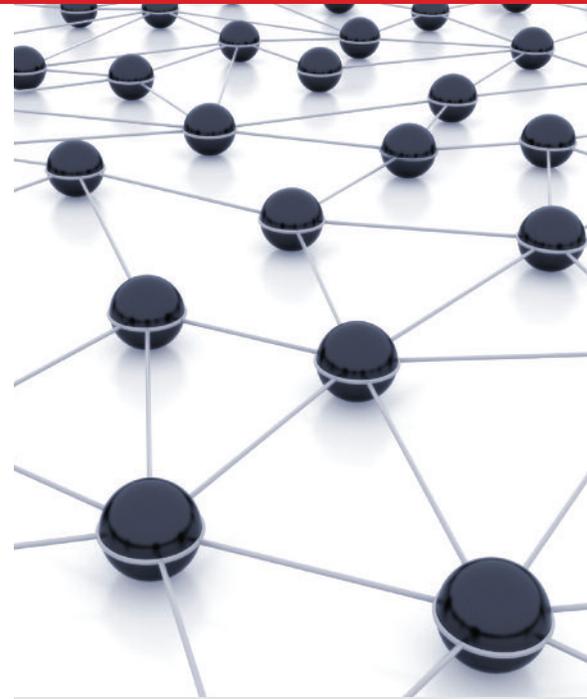
Amidst the tide of activities and functions, there are the physical documents, communications and collaboration that move company work forward. Seemingly, corporate operations are meant to align with the strategic goals of the organization. But, success through workflow management can only occur if business processes can be properly modeled, executed, managed, stored and audited.

Synergy®, from Exact Software™, is a Web-based business management solution that has an embedded workflow engine which drives all business processes. By revealing the activities between people, knowledge and processes within the workplace, Synergy allows companies to have the planning, control and functionality needed for an accountable and manageable picture of corporate projects.

Responsibility, Visibility and Productivity Through Enterprise-wide Automation

A key component of an efficient organization is executing business processes to completion. However, today's economy and technologies only seem to have increased cycle times and requirements to the point where it is no longer obvious who is responsible for executing steps within tasks or projects. Synergy provides the workflow tools needed to model and standardize your business rules, enabling you to automate, manage and track manual and hidden processes on a secure, centralized portal.

By making individual workflows and corporate goals visible, an organization can spot redundancies and decrease errors, while at the same time increasing productivity. With accessibility to the same information and the same set of rules, Synergy enables your company to become more responsible, reliable and proficient.

Synergy Workflow Management business benefits:

- Eliminate unnecessary functions through the automation of business processes
- Establish standard and rules-based working methods for greater management control and auditing
- Monitor and predict customer support, response and feedback
- Enable collaboration and teamwork between employees, customers, vendors and partners
- Give employees a clear understanding of their tasks and end goals
- Shorten cycle times and lower production costs through streamlined and automated processes

With Synergy, workflow consists of "request types" that are customizable; a request type is any action that occurs within an organization, including those involving appointments, HR requests, training, sales, marketing or finance. All requests are linked with their corresponding resources, projects, assets and documents so that all corporate operations are traceable and interrelated.

Only when a task has flowed through the required individual for approval can it then be considered completed. At any time, work can be viewed, remarked on or generate an alarm so that bottlenecks are avoided and follow-through is ensured.

One Source for Activities: All activities, and the information surrounding them are located on one collaborative platform, making workflow available to employees, management, vendors, suppliers and partners as tasks and requests are created.

Activity Monitoring / Exception Management: Any task can be examined, analyzed or triggered at any time, for notification on involvement, due dates, follow-through, log jams and exceptions[1], including urgency level parameters.

Automated Flow: Based on the request type, tasks automatically appear in an individual's workflow, according to the necessary actions dictated by the task. A task can require documentation, collaboration or deadlines, and can be defined to follow a resource path until the request has been processed.

Role-based Security Model: Access to all information is based on roles and rules-based schemas, in order to control and limit use to a need-to-know basis. Requests are given specific security clearance ratings so only those who possess the rating can access such information.

Analysis and Reporting: Synergy contains continuous monitoring capabilities to observe ongoing workflow through pivot analysis and divisional or departmental statistics in order to procure the most significant business information and respond quickly to action.

Synergy Workflow Management features and functions:

- Definable and customizable request types to accommodate company operations
- Extensive and pervasive search options
- Assignments of responsibility for all workflow steps
- Built-in analytical tools to ascertain request usage and average processing times
- Alert generations for risk management through the establishment of deadline notifications

Enterprise-wide Integration: Activity that might otherwise be isolated is by default linked in Synergy. Projects, customers, financials and documents are inherently associated with one another in order to reflect the details of work, creating one intrinsically linked business process.

What makes Synergy unique is its ability to associate actions with the corporate tangibles that are affected, such as finances, documents, assets and resources. Synergy automates the ongoing activities that put your organization in motion. No function needs to go unnoticed in a company; by tracking and evaluating the efforts and processes that occur on a daily basis, your employees, suppliers and partners will inherently achieve time savings and efficiency increases just by doing the work they are supposed to do.

By bringing together the people, processes and knowledge that matter most to your company, Synergy creates an accurate, up-to-the-moment view of your organization's personnel, finance, workflow, documents and asset information, enhancing decision-making, analysis, scenario planning and ongoing management across your entire business.

For more information about Synergy, please contact your Exact Software business partner or account representative today, or visit www.exactamerica.com/synergy.

1 Exception management capabilities available through Event Manager from Exact Software.