

# Exact Synergy

## Workflow Management

**Every business is a community, whether it is under control or not. Members of the community interact and communicate, make decisions and produce information. If these actions and decisions are not aligned, processes are disrupted and competitive edge is lost.**

Exact Synergy is a Web-based business management solution that has an embedded workflow engine which drives all business processes. Within it are contained all the activities, functions, physical documents, projects, customer orders, inquiries, sales call records, marketing events – every aspect of the business that is critical to achieving the organization’s goals. Through workflow each person in the organization knows exactly what is expected, and when.

### **Responsibility, Visibility and Productivity**

Every organization strives to execute their 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. Exact 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 simultaneously increasing productivity. With accessibility to the same information and same set of rules, Synergy enables your company to become more responsible, reliant and proficient.

You can use Synergy to reveal the activities between people, knowledge and processes within the workplace, allowing your company to communicate, collaborate, assure compliance and establish control.

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.



With Exact Synergy Workflow Management you can:

- 1** Eliminate unnecessary functions through the automation of business processes
- 2** Establish standard and rules-based working methods for greater management control and auditing
- 3** Enable collaboration and teamwork between employees, customers, vendors and partners
- 4** Give employees a clear understanding of their tasks and end goals
- 5** Shorten cycle times and lower production costs through streamlined and automated processes
- 6** Define and customize request types to accommodate company operations
- 7** Achieve compliance through reporting and document tracking that meets any standard and accommodates any audit

**= exact**

And it all comes together.



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, 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.

**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. Synergy Workflow Management features and functions:

- 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

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.

“Synergy by default breaks down functional silos through its integration of workplace data, while its workflow facilitates function through communication. We have complete management of value chain, financial, workflow, document and project information through an online browser. You can't get more powerful than that.”

Neil Montgomery, President & CEO Davis Controls, Ltd.

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For further information please call 1.800.468.0834, Ext. 2650 or visit [www.exact.com/synergy-us](http://www.exact.com/synergy-us)

