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# e-Synergy aces business basics

**REVIEW:** WEB-BASED SUITE HONES WORKFLOW AND DATA MANAGEMENT CAPABILITIES

By Michael Caton

**W**ITH MODULES TO MANAGE CRM, HUMAN RESOURCES, projects, financials, logistics and workflow, Exact Software's e-Synergy delivers more than the sum of its parts. e-Synergy provides midsize companies with a Web-based business management suite that is affordable and relatively flexible.

In eWEEK Labs' tests, we found that e-Synergy does a good job of integrating a core workflow system with components for managing customer, financial and HR data in a way that gives companies a good tool for creating internal- and

external-facing applications.

The management approach for pricing and revisions hits a good middle ground between perpetual-license and subscription models. Pricing starts at \$1,000 per user for a perpetual license, with maintenance and support each costing 10 percent of the purchase price per year.

Exact Software has the product on a long-track development process, with no major version releases in the past three years. But any customer with a maintenance subscription has access to the functions that have been introduced at regular intervals during that time.

We looked at the latest build, which was introduced in January. Although most feature improvements aren't as large-scale as the quarterly releases found with hosted applications such as Salesforce.com Inc.'s Salesforce.com or NetSuite Inc.'s NetSuite, the e-Synergy revisions generally have been more digestible when it comes to getting users up to speed.

Modules define the core functionality of e-Synergy. The application's underlying secu-

and business-partner-facing applications.

In tests, we could manage a corporate Web site, build and manage programs for developing leads, and manage an extranet for business partners that provided access to core application capabilities. e-Synergy requires Microsoft Corp.'s Internet Information Services and SQL Server 2000.

The workflow engine has

liked the ease with which we could repurpose existing workflows for new ones.

Although e-Synergy can provide a bevy of capabilities, it has some inherent limitations that companies will need to work around. For example, the workflow engine supports only four steps within a process. For more complex processes, we had to divide the process into a couple of separate stages. (See related story, right.)

Furthermore, the application doesn't include a graphical modeling engine, although it does provide a good linear view of workflows. These tools are common in dedicated BPM (business process management) packages such as Ultimus Inc.'s BPM Suite.

Workflow is the critical component of both e-HRM, the HR management module, and e-CRM, the customer relationship management module. The e-HRM module is also a core component for managing security levels throughout the organization because the module manages roles within an organization. We found both e-HRM and e-CRM easy to manage in tests because they share the same forms and user interface (see screens, left).

Administration takes place on two levels in e-Synergy: at the system level and in each module. System-level administration took a little getting used to in tests, particularly because many core features are controlled by roles and organizational structures



**The e-CRM and e-HRM modules within e-Synergy provide one-click access to projects. Many of the forms in e-Synergy share common design elements, making the system easy to learn. Building custom forms within e-Synergy is also straightforward.**

rity model and its focus on workflow and document and content management enabled us to build broad customer-

a good set of tools for building workflows and forms in the framework of the application, and we particularly

# PADI expands e-Synergy use

**CASE STUDY:** ORGANIZATION DIVES DEEPER INTO MANAGEMENT SUITE

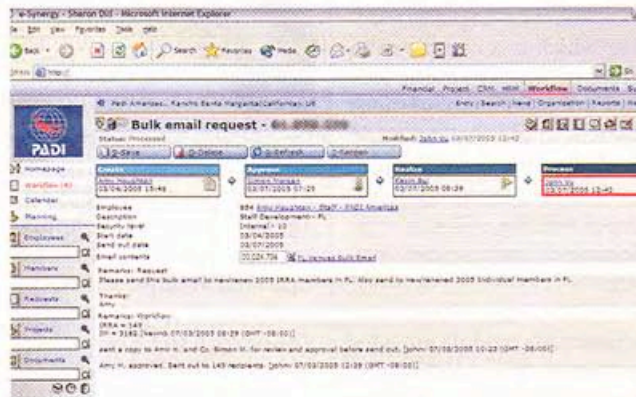
By Debra Donston

**W**HAT A DIFFERENCE TWO years makes. In the summer of 2003, eWEEK Labs interviewed Sharon Dill, then director of IT at PADI Americas, about her organization's use of Exact Software's e-Synergy (go to [www.eweek.com/labslinks](http://www.eweek.com/labslinks)) system. We recently caught up with Dill, who is now CIO of the organization, to see how the system has performed over time.

e-Synergy was originally implemented at PADI, a scuba-diving certification agency, as a way to better manage relationships with its more than 100,000 members.

In 2003, PADI was primarily using the e-Synergy CRM (customer relationship management) module, with about 100 PADI employees on the system. Since then, said Dill, PADI has expanded its use of e-Synergy to include the system's documents, projects and workflow modules, and almost 400 employees are using the system.

Many of the new users



**e-Synergy allows only four steps within a process, which forced PADI to consolidate its procedure for requesting approval for bulk e-mails.**

are in PADI's international offices. Last year, Dill trained employees in PADI's offices in Switzerland, England and Australia.

"We're a global company," said Dill, based in Rancho Santa Margarita, Calif. "Our members tend to travel from office to office—where the sun is shining—so the main driving force [for this expanded use of e-Synergy] was to be able to have customer comments that everyone has access to."

Once a day, PADI uses an XML integrator to upload new information from five Exact Macola databases,

located across the globe, into e-Synergy.

In August, PADI Americas and PADI Europe started to make use of e-Synergy's documents capability to cut down on paper and ease access to member information.

"We have a huge file room that's bursting at the seams with paper," said Dill. "In the past, we would create a manila folder, put a member number on it and put any significant pieces of paper in it. Now, we scan this kind of paperwork and link it to members' records in e-Synergy."

Dill said PADI has also significantly expanded its use

of workflow and roles within e-Synergy, "so something doesn't get sent out and stuck in limbo if someone is not around."

One of the limitations noted in eWEEK Labs' review of the latest build of e-Synergy, which starts at left, is that the system's workflow engine supports only four steps within a process. Dill said this has not been an issue for PADI, for the most part, but there have been instances when "a fifth step would have been nice."

For example, said Dill, the process for approving PADI bulk e-mail messages had to be squeezed into four steps to make it work in e-Synergy (see screen, left): Marketing makes a request to send a bulk e-mail message; the request must then be approved by an IT executive; the approved request then goes to a programmer who pulls the appropriate e-mail targets; and, finally, the request goes to a Web staff person who sends the e-mail message.

Dill said she would have liked to be able to include a fifth step—where marketing would automatically be informed that the e-mail had been sent—but, instead, the original requester has to go in and check to see if the process has been completed.

Dill said PADI employees are also making much greater use of e-Synergy's projects module—another

[CONTINUED ON PAGE 44]

within the e-HRM module. e-Synergy's security model limits who has access to what kind of information, so it does not really matter that configuring back-office connectivity for divisions happens in the e-HRM module rather than in the system module. (We expected that information to reside in

the system module.) e-Synergy natively supports other Exact Software back-end systems, such as the company's accounting systems. Otherwise, the system supports connections to accounting and other back-office applications through XML. XML also controls data exchange with client

applications such as Microsoft Word and Outlook. The e-HRM and e-CRM components have a common look and feel, and the major forms within each application have a common design. This made it easy for us to repurpose some of these elements in applications we designed using the

form and workflow tools. In general, we liked the way we could manage processes extensively from within each module. For example, the e-HRM module controls the whole process of managing employees, beginning with hiring. The HR system can then manage

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**E-SYNERGY** FROM PAGE 43

the process, from posting a job description on the Web site to budgeting and hiring.

The hiring workflow provides a good model of e-Synergy's workflow capabilities. We needed to follow the logical steps of associating a job requisition to a role within an organization. After that was done, it was possible to associate a particular job with a candidate who had applied for it via the Web—and, in the process, we could save an HR manager the trouble of filling out employee record information.

The e-CRM module manages customer and partner data. We found that e-CRM provides good tools for users charged with managing customer data. The main screen

(as well as the left-hand pane) is search-driven to give sales and customer service staff quick access to customer or partner data. We liked the customization capabilities and the ease with which we could manage workflow from within the e-CRM module.

The e-CRM module works well with the e-Logistics module, which is a combination product management tool and supplier management system. In addition, we could easily tap into the e-Projects project management application and the e-Documents document management system.

On the financial side, the e-Financials module provides budgeting, an executive view and reporting tools for consolidated company financials.



The e-Synergy home page organizes workflow and important documents.

Accounting must be managed in an external application, and data must be imported through native connectors or through an XML connector for Exact Software accounting applications.

Another feature that we thought worked particularly well is e-Synergy's support for synchronizing the user's Outlook calendar with his or her e-Synergy calendar, as

well as the document integration with Microsoft Word. If we needed to create a document to associate with a particular customer account, we could create and upload the document directly from Word by providing customer account information. e

*Technical Analyst Michael Cation can be reached at michael\_cation@ziffdavis.com.*

**EXECUTIVE SUMMARY**

**e-Synergy**

Exact's e-Synergy combines a workflow engine with prebuilt CRM, HR, logistics, budgeting and content management applications in a well-designed suite. The

**KEY PERFORMANCE INDICATORS**

EASE OF USE	EXCELLENT
WORKFLOW	GOOD
ADMINISTRATION	GOOD
CUSTOMIZATION	EXCELLENT

application can be configured to run a broad range of applications, including Web-based partner programs that tap the system's CRM application. Workflow and administration have quirks, but companies can clear these hurdles using the

system's flexible design elements and security features. More information is available at [www.exactsoftware.com](http://www.exactsoftware.com). **COST ANALYSIS:** Priced at \$1,000 per seat, with 10 percent annual maintenance and 10 percent annual support costs, e-Synergy is priced comparably to other licensed enterprise applications. The big difference is that the company delivers regular feature updates through maintenance in the way a hosted application such as Salesforce.com does, making maintenance and support valuable investments.

**EVALUATION SHORTLIST**

- **iCode Inc.'s Everest** Client/server and Web-based all-in-one business management suite that offers more accounting features ([www.icode.com](http://www.icode.com))
- **NetSuite's NetSuite** Hosted application that has broader accounting features but lacks HR and budgeting capabilities ([www.netsuite.com](http://www.netsuite.com))
- **Salesforce.com's Salesforce.com** Sales- and customer-service-focused hosted application that has similar XML-based connectivity to other back-end applications ([www.salesforce.com](http://www.salesforce.com))

**PADI** FROM PAGE 43

manila-folder-killing application.

For example, said Dill, a project was created in e-Synergy for a diving seminar that was slated to take place late last month in Fort Lauderdale, Fla. From

any browser-based system, the PADI instructor giving the seminar could access information ranging from the members registered for the seminar to the refreshments scheduled to be served at the site.

When eWEEK Labs last spoke with Dill in 2003, she related some targets for e-Synergy that she hoped to meet this year. Many of those goals have been achieved, but

she is still working on developing e-Synergy for use as an interface for external customers, among other things.

In fact, Dill said it was interesting to reread the case study that eWEEK published in July 2003 to see how far

she had come with e-Synergy and where she would like to go.

"If you would have asked me two years ago if it would have taken two years to get this far, I would have said no—we can do it much faster

than that," she said. "I think something of this scale really does take time to nurture." e

*Executive Editor Debra Donston can be reached at [debra\\_donston@ziffdavis.com](mailto:debra_donston@ziffdavis.com).*



Dill: Access to customer feedback drives use of e-Synergy.