

Use Synergy More Effectively in your Business with our Tools, Manuals and Tips



Workflow Search Criteria (Part 2)

Searching workflows can involve the use of "Criteria" fields, which was discussed in the previous newsletter.



The second attached document (below) discusses the use of the Advanced Search field. It can be a very beneficial function when combined with the criteria fields discussed previously.

[Click here for the first presentation on Organizing Your Workflow".](#)

[Click here for the second presentation on Organizing Your Workflow - Advanced Search](#)

Synergy Function Differences with Macola 10

When using Synergy with Macola 10, it is important to discuss how changes made by the Macola Development Team affect standard Synergy functions. And the current processes that you use daily.



I will try to keep you up to date as we find functionality that can affect your processes, and I appreciate any Synergy users that find function differences to alert me so that I may pass this knowledge onto others.

This week one of our customers found that the creation of Sectors / Subsectors and Size are now completed using the fields within the Core ERP screen under System / Financial. Use of the fields using the path of Modules / Marketing / Setup / General will no longer work properly.

For customers not using Macola 10, you will continue to enter Sectors / Subsectors / Size in the manner you were originally trained within Synergy screens.

"Live" SynergyExpert Website

Our new website is now "Live".

Synergy users that have been out to the site have expressed their appreciation that we have made it easier to search for tools based upon the Synergy module that they are requiring assistance.



This week, presentations on the Rules Engine and Procurement modules have been added. Additional documents and presentations on Synergy will be stored also under the "What can I do with Synergy" section.

If you cannot find what you are looking for, please contact me at dkloepfer@synergyexpert.com.

Removing Resources within Synergy

When trying to remove Resources, you may see the message "Can not remove - Linked to absence" in Synergy Enterprise.

We caution Synergy users to not remove the resource, because you can lose history for them. It is much better to put an employee on inactive status.



This is a common option (recommended by Exact) and does not affect the Synergy license count. Inactive employees are not counted as active license users.

The reason that a resource can not be removed (or should not be removed) has to do with the history that is linked to transactions (workflow requests) and documents. So deletion is only possible if the requests, documents and other synergy touch points to which the employee is linked are first removed. You can check as follows which requests the employee is linked to (involvement = employee).

Go to detailed search requests and enter the employee number, click on Show. You can now view all requests linked to this employee: these must first be removed, after which the employee can only be removed.

It is much easier and more beneficial to your organization if you select the option to make the Resource "Inactive".

Over 80 Plus Tools now in our Catalog - Take a Look

This Catalog provides a summary by each tool of our tools, including its use and functionality. This next week, I will be adding some new tools.:



The GLM Systems development team is finishing up the option to convert a Crystal Report to a PDF file format while in a workflow. Using their [Workflow Plus Signature Capture tool](#), the PDF will include the signature that is added in the workflow process.

If you are interested in any of our tools, please contact us for a demo.

[Catalog](#)

Quality Management Software Using Synergy

While at Evolve, I was able to review the Quality Management Software (QMS) that was created by a fellow business partner, Attivo Consulting. I am impressed at the depth of their product which includes:

- Non-Conformance Management (NC)
- Corrective & Preventative Action (CPA)
- Inspections
- Audits
- Document Control
- Key Indicators
- Trend Analysis
- Tools & Equipment (Metrology)



I have found that QMS for many Synergy customers has been handled as a 3rd party software, or with copious spreadsheets and manual records.

Optimally, a robust QMS that is an integral part of your ERP system is the most efficient and reliable. In this way, there can be no data out of sync with inventory control, lot and serial management, production or customer service.

Attivo has extended the Exact Synergy platform to create a single, unified Quality Management System integrated with Exact Macola 10, Macola ES and Progression.

If you wish to have more information on these three tools, please contact Len Reo at len@attivoconsulting.com

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