



Selectica

www.selectica.com

At A Glance:

- **Company:** A contract management software provider
- **Employees:** 175
- **Industry:** Software
- **Location:** San Jose, CA
- **Challenges:**
 - Sarbanes-Oxley reporting was labor intensive.
 - Lack of automation lead to errors and delays.
 - SOX reporting required 50% of a resources workload.
- **Results with OpenAir:**
 - Compliance. Sarbanes-Oxley compliance is made simple with OpenAir.
 - Accuracy. Compliance reporting was reduced by 75% with greatly improved accuracy.
 - Flexibility. Consultants can enter time and expense while on the road.
 - Training. Easy for staff to get up to speed quickly using OpenAir.

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— Joe Longo, VP of Professional Services, Selectica

Results

Selectica has been using OpenAir since June of 2005. With an interface considered self-explanatory to use, the only in-house setup required was the initial data entry, and configuring the application for Selectica’s particular workflows for approvals and exceptions. One-hour webinars were held for the end users. Training was held for managers and directors responsible for setting up and monitoring projects. “But that went fairly quickly. We were live within the first two weeks, and within 90 days we had completed the roll-out and were running smoothly,” said Joe Longo, VP of Professional Services, Selectica.

OpenAir’s navigation was also cited for being flexible enough to allow for the addition of custom fields into the records. For example, Longo’s Professional Services group manages its services contracts using a Contract Management system that Selectica developed as a product for resale to its clients. This system assigns a unique identifier to each services work order. When the contract is signed a project is created in OpenAir. To keep the two systems aligned, the unique identifier from Contract Management is entered to a custom field in OpenAir. This process makes the entire application suite easier to manage.

Says Longo, “This tracking and reporting is very powerful for an organization like ours because these are the weakest links of professional services organizations. Most professional services organizations are great at execution; show me the tree, give me the ax, cut down the tree. But a lack of automation in tracking of projects and resources makes companies like ours organizationally weak; throw in SOX auditing and it’s a nightmare. Our ability to integrate contract management with OpenAir has proven to be a life saver.”

Challenges

According to Longo, prior to him using OpenAir for SOX reporting, the process of compiling and calculating the required information would consume as much as 50 percent of a full-time employee’s work load. “This feature of OpenAir was something we were not expecting and it’s helped us out tremendously. In fact, we live by it. And our financial people also live by it. They can do their own internal review prior to submitting reports to the auditors. By simply



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using standard OpenAir reporting with some minor modifications we are able to demonstrate SOX compliance. If all we did was Sarbanes-Oxley reporting, OpenAir would be worth it on that alone.”

Before using OpenAir Longo’s group would import all time reports out into Excel, graft-in the project information, and then enter formulas to conduct calculations. “The task was onerous and error prone,” admitted Longo. “With the current system we are saving 65 to 75 percent of that effort while greatly improving our accuracy.”

The Solution

Another powerful tool that’s native to the OpenAir application is the ability to run estimations for projects. “Estimations give me a scratch-pad view of a project before we commit to the proposal. It allows me to make adjustments on the fly and give approvals to the team to move forward with the sale.”

Selectica also plans to make more use of OpenAir’s ability to email quotes to customers, something that we’ve only used sparingly. “For example, a client may ask us to request additional consultants at short notice. I can quickly turn that around in OpenAir by sending an on-line quote and having them approve it online. I can then begin the resource assignments.”

“For basic time and expense tracking we also appreciate OpenAir’s integration with mobile devices. Workers don’t need to be connected to the Internet to use the application. For someone who spends 40 percent of his time traveling (like myself), this is a huge benefit.”

“I’m pleasantly surprised by the amount of valuable functionality that’s put into the application that we’re always finding uses for.”

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