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**Overview Of The**

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**ALERT System**

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**Specifically**

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**Developed**

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**For The**

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**Management Of IT Business**

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# Contents



**2**

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## CONTENTS

▼▼ THE OBJECTIVE	3
▼▼ APPLICATION SCOPE	4
▼▼ KEY SYSTEM FEATURES	5
▼▼ THE COMPANY BEHIND ALERT	6
▼▼ ALERT FUNCTION CHART	7
▼▼ BENEFITS SUMMARY	8
▼▼ MODULE DESCRIPTIONS	9
▼▼ IMPLEMENTATION PLAN	10
▼▼ DEVELOPMENT AND SUPPORT POLICY	11
▼▼ CONFIGURATION NOTES	12
▼▼ TECHNICAL NOTES	13
▼▼ CONTACT US	14

# The Objective

# 3

With software product 'life cycles' continuing to shorten and with the IT services market constantly re inventing itself, it is crucial that you have the appropriate tools to survive in this competitive business environment.

ALERT provides not only the processes to make your IT business more efficient, it also provides the key up to date information needed for pro-active management of your business.

ALERT's tangible business benefits include:

## **Increased Profits**

- More timely and accurate billings by integrated billing function to daily activities
- Improved sales by monitoring customer needs
- Reduce cost of sale through defined business processes
- Improved time utilisation through better planning and monitoring of time usage
- Improved quoting performance through integrated quote and pricing facilities with quote to actual reviews
- Timely, accurate and detailed information on where profits are being generated and lost

## **Improved Quality**

- Defined processes for improved quality
- Reduce costly errors through the use of production and delivery control mechanisms
- Ensure delivery to requirements specifications through logging, tracking and managing requests through to delivery

## **Better Utilisation Of Time**

- Plan and track employees utilisation of time
- Automated processes to achieve more in less time
- Integrated system cuts out duplication of data entry and reporting effort

## **Improved Service**

- Knowledge base tracks all customer issues, responses and work performed
- Pro active service delivery tools
- Track and monitor service performance against service level agreements
- Automated issue escalation and notifications to ensure all issues are attended to

## **Increased Management Control**

- Up to date, real time information on all business activities
- Critical performance indicators
- Single page business performance reports
- Drill down analysis from high level indicators

ALERT provides these benefits in a single integrated total business management system.

VBS believes that ALERT provides your business with the above benefits at the lowest competitive system 'life cycle' costs.

It's one of the key reasons to do business with us!

We are confident of making this claim because our customers are proving it for themselves and for us. We invite you to judge us by the facts.



# Application Scope

# 4

ALERT has been specifically designed to meet the operational and business management needs of companies and IT departments that develop and deliver IT products and services.

The emphasis is on providing high levels of customer service while reducing costs through greater efficiencies.

ALERT is an integrated system that manages the full project life cycle from initial customer request to delivery and billings. Projects form the hub of ALERT with all activities, both core and supporting, being managed by project.

All business activities are linked to and managed by projects for the purpose of gaining control and visibility over the activities.

ALERT management covers the following functions and activities:-

- Resource planning / scheduling
- Project planning and tracking
- Time recording
- Managing customer requests
- Managing billings
- Service delivery
- Quoting and estimating
- Software production, testing and delivery
- Research and development management
- Profit and contribution control and analysis

## *ALERT For Everyone....*

ALERT is used by the management and all team members to achieve common business objectives. It brings a united team approach to the business by recording business priorities and measuring performance against those.

## **ALERT for the :-**

### **CEO**

- Macro view of business performance at operational and financial level
- Accurate financial period Revenues, Sales, Billings, Cost and Margin reporting
- Critical performance indicators available in real time by days, weeks, periods and years
- Multi dimensional analysis of performance
- "drill down" detailed analysis to project and employee

### **General Manager**

- Apply a management by project approach so that all business activity is measurable and accountable
- Define different business activities and manage these independently
- Set service and product pricing and monitor performance to these
- Set performance criteria such as utilisation, customer service, contribution rates and measure actuals against these
- Multiple project view of business activity
- Manage and report business units, lines of business, services, software products and more independently
- Exception reports to highlight problem areas
- 9 user configurable analysis codes for meaningful summary reporting and available for all major records such as customers, services, employees, projects etc
- Ready access to summary and detailed information on all business activity



## **Services / Consulting Manager**

- Service request logging for visibility of future work
- Resource scheduling and planning tools
- User defined timesheet approval processes
- Time and material or fixed price service pricing
- Flexible service pricing structures including multiple pricing items for same service i.e. for service variations such as time of day
- Specific project based service pricing with configurable price lookup hierarchies
- Billing terms, schedules and milestones recorded by project
- Automated service invoicing. Both Time and Material and Fixed Price
- Time, revenue, billings and gross margin analysis optionally available at levels of Service, Employee, Service/Employee or Employee/Service
- 9 user configurable analysis codes for meaningful summary reporting of services
- Invoicing linked to customers, projects, sales
- Flexible sales and margin reporting and graphing backed up by multi dimensional analysis tool for ad hoc 'slice and dice' reporting
- Key Performance Indicators available in real time as graphs and reports, also with analysis tools, including Utilisation, Contribution Rates, Billing Rates
- Inetrfaces to common accounting systems are provided as standard

## **Finance Manager**

- Earned Value and Activity Based Costing capability
- Report Sales V's Revenue V's Billings independently
- Outstanding Orders – Outstanding Revenue, Outstanding Billings.
- Ability to report Revenue and Billings at the required level of granularity down to project/service/employee.
- Service, Software product and other product price lists maintained in ALERT
- Invoices generated from within ALERT for faster, more accurate and detailed invoice production.
- Forecast Sales, Revenue and Billings
- Customer terms and specific customer project terms recorded in ALERT



## **Project Managers**

- Manage both fixed duration and ongoing projects
- Record all projects and flexibly manage at the level of detail that the project requires
- Tightly integrated with Microsoft Project™
- Manage project milestones
- Record and print multiple versions of project estimates and quotes
- View potential gross margin by project and analyse actual variations
- Project resource planning linked to daily resource planning
- Project level controls able to be applied such as level of detail in timesheet entry and resource planning
- On line, real time project details such as timesheet entries, project billings, current resource plans, system calculated remaining work estimates, linked requests / work items
- Multiple project (portfolio) reports available over flexible report ranges
- Detailed project reports including work effort and financial reports
- Revenue, Billings, Cost and Gross Margin reporting of projects that span multiple financial periods
- Ability to manage any billing schedule terms including billed in advance, part billings, billed in arrears etc

## **Account Managers**

- Real time customer based reports available from all areas / departments of the organisation i.e. Help Desk, Consulting Services, Software Production, Finance etc
- Ability to record potential future projects to use as a basis for future sales efforts
- Capability to report and analyse profit trends and rankings by customer

- Historical customer service statistics available Software, Service, Product and Miscellaneous sales and margin managed and reported in ALERT independently

## **Q.A Manager**

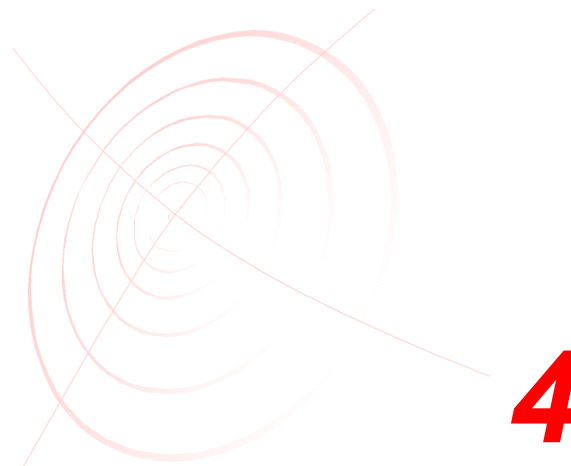
- Test plan logging for visibility of future work
- Resource scheduling and planning tools
- Job requests linked to work requests with ability to record multiple level testing notes
- Flexible analysis of time and costs for testing work carried out
- Capture and reporting of production performance such as number of errors, error turn around time etc

## **Help Desk Manager**

- Central logging of all customer requests
- Requests logged internally or externally over the Internet
- ALERT handles all types of requests including software error, training, documentation change, consulting, software enhancements etc
- Service Level Agreement management
- User defined automated e-mail notifications of selected events
- Escalation facility to escalate jobs not attended to within the required timeframe
- User defined request queue / lists visible on line with key progress information
- International time zone compliant
- Request status reports
- Web based customer request logging and tracking reports
- Customer request performance statistics available in graph format
- Detailed analysis of customer requests available using multi dimension analysis tool



# Application Scope ....



## **Software Development Team**

- Defined production processes
- On line work schedules definable at any level from project / task / activity / work unit
- Individual works orders to manage change items and objects associated with change
- Ability to assign individual works orders to one or more initiating requests
- Lookup on initiating request with full details available from the work order's management screen
- Time recording against production work

## **QA Testing Team Member**

- Testing facilities linked to software production for visibility of changes implemented
- Automatic generation of test shells from production
- Tests may be conducted at any time for any purpose
- Tests link to software objects to ensure correct version of object is being tested
- Multiple test iterations able to be performed with errors recorded by iteration
- Test and error reports able to be produced

## **Services Team**

- On line service schedules definable at any level from project / task / activity
- Record unlimited service notes against all service activities for future reference
- Automatically produce service reports for customer sign off and forwarding to accounts office
- Ability to see if timesheet entries have been approved, invoiced etc and by who

- Very flexible service pricing lookup routines for the pricing of services
- Customer service billing reports generated for any range of customer, employee, service, date range etc
- Easily check that all work performed has been billed

## **Application Support Team**

- Single knowledge base used to manage and record software product release notes / changes
- Logging of application requests including bugs, enhancements, training etc performed in single knowledge base with flexible reporting and analysis by customer, issue, application module / object etc.
- Ability to configure automated e-mail notifications of particular events for selected requests
- Application development roadmap managed in ALERT
- Future application releases fully documented during the course of software production to allow advance notice of approaching changes
- Application changes linked to initiating requests to allow lookup on who, why and when changes were made
- Applications and versions in use by customers to the module level including customer specific variations are recorded in ALERT to provide accurate information necessary for effective customer support
- Web based customer service desks configurable dynamically from ALERT database details - no user maintenance required



# Key System Features

# 5

## General

ALERT strictly adheres to a principle of "enter information once and use everywhere". For example timesheet details are used to generate service invoices, track project tasks and provide management reports of utilisation and performance.

All team members from the CEO to administration staff can use ALERT. More effective communication, common knowledge of all issues and business priorities are examples of some of the benefits of this.

ALERT provides secure information to staff and customers across the internet

ALERT uses Microsoft database technology for 'open data access'

Import and Export facilities to other systems are provided e.g. Microsoft Excel and Word

Interfaces to common financial systems are provided.

## Data Analysis

ALERT comes with many standard graphs and reports.

ALERT uses Microsoft Excel pivot tables for multi dimension slice and dice of data.

Pivot Table reports include Human Resource Planning, Plan V's Actual, Revenue, Gross Margin, Billable Rate, Contribution Rate, Utilisation and more

All master records such as Customer, Employee, Service, Products, Projects etc have 9 user definable analysis codes. These analysis codes are used in most reports for flexible range reporting.

## Microsoft Project Integration

ALERT tightly integrates with MS Project and significantly extends it's capabilities for managing multiple concurrent projects while at the same time simplifying the process.

## Search Facilities

ALERT provides powerful search facilities to find master records and transactions.

For example the Project search from can be invoked by double clicking in the project field on most forms. Standard and advanced search criteria may be entered and searches performed. Criteria ranges including text string lookups are available. Doubling clicking one of the projects that has been found will return it to the form.

## Period End Processing

ALERT has structured financial period end processing. This provides accurate period based analysis of business transactions.

Module period close offs ensures accuracy of information. For example ensuring all service time has been entered and then closing off timesheet entry before generating invoices ensures that all time will be billed.

## Summary Historical Data Tables

Summary transaction data is stored in period based files. This includes revenues, billings, costs, timesheet details, customer requests statistics and others.

The benefits of this is in faster, consistent period based reporting.





# The Company Behind Alert

# 6

VBS specialises in ALERT.

ALERT is designed by IT experts for IT experts.

VBS has behind it a team of skilled IT consultants, management consultants, business analysts and programmer / analysts that are very much in tune with IT business requirements of today.

VBS offer a 'One Stop Shop' approach.

## **Team Spirit**

A *team spirit* and *culture* that places emphasis on the provision of timely and efficient service is in place at VBS.

This means:

- Concentrating on being business solution providers, not simply software vendors
- Customer focussed staff and management
- Being responsive to new business requirements

## **Team Skills**

It is important that VBS are able to provide professional services in a number of key business and technical areas.

Staff include management consultants, business analysts, programmer / analysts, quality assurance staff and product support staff.

Each customer is assigned an account manager and all projects are assigned a project manager.

VBS are able to provide a "Full Service" from system setup and configuration through to staff application training.

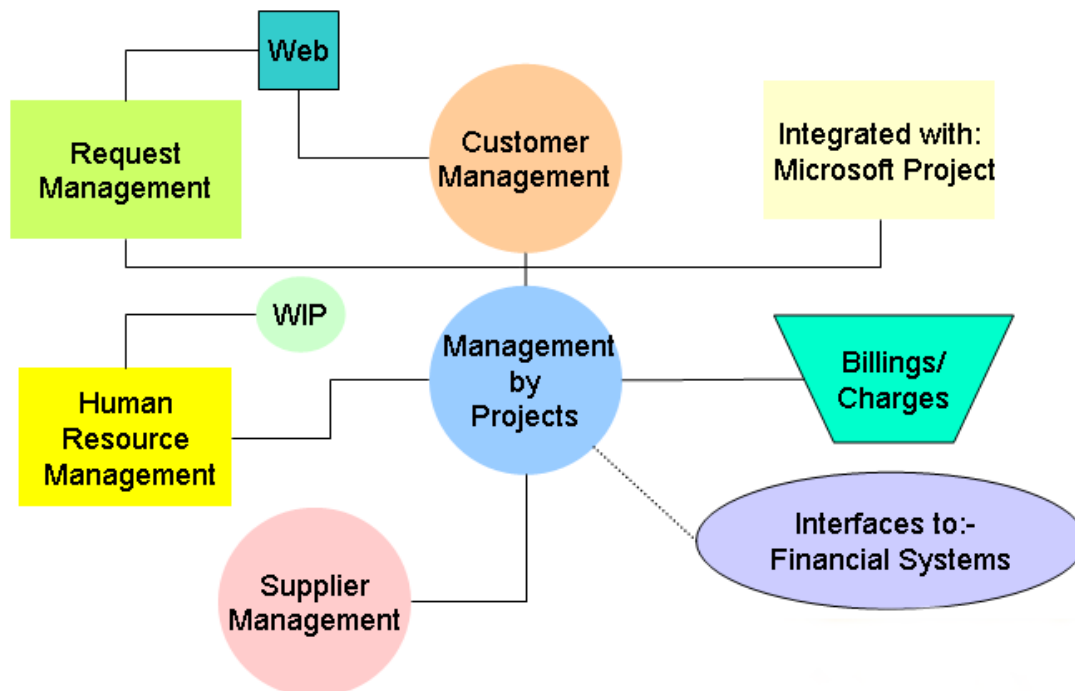
Among VBS's skills and experience is:

- IT Project management from small to large scale international IT projects
- Strong business requirements interpretation skills, specifically in the area of Business Management systems
- Competencies in computer systems management, computer and network infrastructure
- Skills in Internet and Intranet business systems
- Experience at managing technology driven change



# Alert Function Chart

7



'ALERT' covers the major function requirements of companies delivering IT products and services.

### Management By Projects

- Is the team coordinated?
- Are priorities being addressed?
- Meeting deadlines
- Planning and review

### Customer Service

- Lower support costs
- Quicker response
- Closed loop tracking
- Service statistics

### Customer Management

- Knowledge of all customer business issues
- Rapid response
- Customer management tools
- Pro active service rather than reactive

### Human Resource Management

- Forward plan resource schedules
- Planned V's actual hours spent
- Powerful time analysis (Hrs Billable/Non Billable) (Hrly Recovery Rate)
- Defined business processes to ensure quality

### Microsoft Project

- Projects stored in Alert SQL database
- Project updating control – record locking etc
- Project planning functions invoked from Alert
- Enterprise Project data managed in Alert and controlled in MS Project plans by Alert
- Project Tasks etc accessible in Alert

### Interfaces

- Financial systems (optional)
- MS Excel and Word
- Web
- e-mail

The ALERT modules are continually being enhanced to meet your business requirements.



# Benefits Summary

8

There are major benefits of adopting VBS's ALERT system for your company:

## Return on Investment

ALERT has a fast pay back on your investment through:

- Improving resource utilisation through resource planning and monitoring
- Lowering the cost of sale through automated and well defined processes
- Increasing sales through improved service levels
- Billing management tools ensure that billings are not missed
- Pricing flexibility ensure that customers are charged at the correct price at all times - improving gross margins
- Structuring business units, lines of business, products and services to enable management of different business activity
- Gross margin analysis will help you focus your efforts on apportioning effort over profitable and not so profitable lines.
- Streamlining processes and reducing clerical effort thus reducing overheads.

## Protect your Investment

ALERT is being constantly developed to meet changing business requirements and to take advantage of new technologies.

This means that you will not have to replace software or hardware - they will both grow with you, protecting your investment in the system at all times.

## One Stop Shop

VBS are able to manage the implementation of the system including hardware and software.

Project management and consulting for the implementation of ALERT may be provided for you should you require.

Alternatively VBS are able to work with your staff or your preferred consultants to manage the implementation

Support for all software is provided by VBS.

## Track Record

ALERT consistently proves itself as a totally reliable business system.

Businesses cannot afford down time in a system. ALERT has a proven track record of operating in a critical business environment and being absolutely dependable.

The lower cost, availability, wide acceptance and open nature of Microsoft's SQL database ensures that your business benefits from the ALERT Microsoft based system.



# Module Descriptions

ALERT is comprised of the following modules:



Time Alert



Project Alert



Project Planning Alert



Sales Alert



Purchase Alert



Request Alert



Software Alert



Test Alert



Web Services



## Introduction

Time is one of a companies most valuable assets. Not managing time can also be one of the greatest failings.

ALERT provides you with the tools to communicate business objectives to employees through resource planning and setting of priorities.

Project progress may be monitored and managed through feedback from employees.

ALERT constantly instills a time management mentality to employees.

ALERT's system based methodologies for the delivery of services, development, support and other tasks lower the cost of training and allow staff to focus on achieving results.

Maintaining production and service information in a single central knowledge base allows resources to be flexibly moved between projects.

ALERTS automated processes allow employees to become more productive by cutting out manual tasks such as the production of product release notes, BUG reports, project status reports and others.

Managing time effectively requires knowledge of your staff and their capabilities. ALERT assists with the assignment of tasks to staff through skills matching and availability checks.

A 'global' company work calendar may be defined in ALERT with individual employee overrides. This may be used to record employee work hours and manage resource availability.

ALERT's unique resource planning facility is a key to powerful resource planning. ALERT allows both project based planning and daily employee resource planning with each updating the other.

Flexible resource schedule reports are able to be produced using the multi dimensional analysis tool with variations between plan and actual.

Timesheets are an integral part of human resource management and ALERT's timesheets perform much more than simple time capture.

Controls such as minimum level of service details required by project and enforcing service item selection for the purpose of correct billing's ensure that employees are recording the information necessary to properly manage the business on a day to day basis.

Timesheets facilities also include integration with production work units and resource schedules. Service item notes, activity descriptions, powerful project search facilities including text string searches and more are included with timesheets.

There is also the ability for the employee to make recommendations of billing requirements for individual services.

A timesheet posting facility allows for close off of timesheets for the production of reports, billings etc

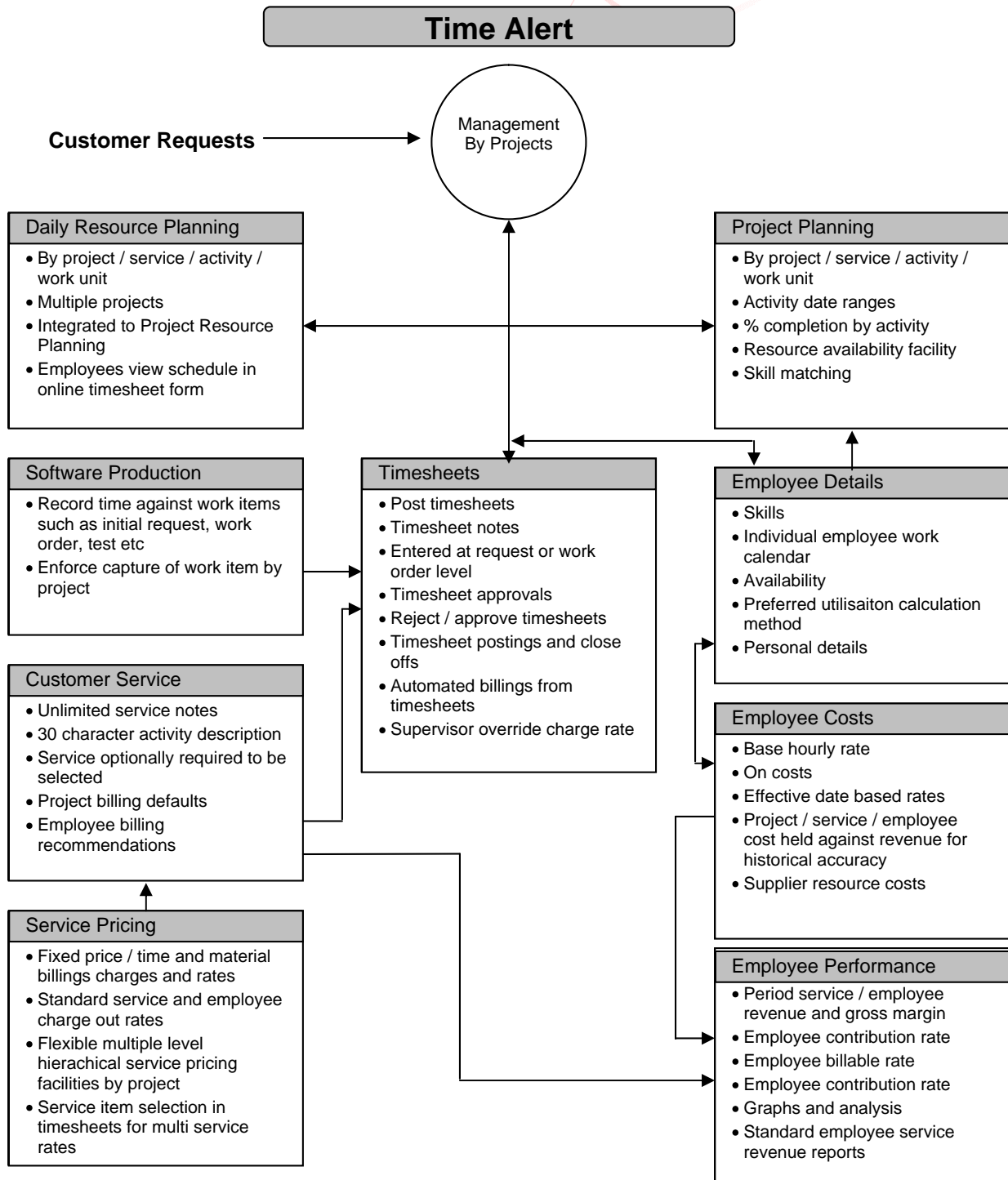
User defined timesheet approval processes allow supervisors to perform timesheet reviews to ensure that all timesheet details entered are accurate and appropriate before being used.

ALERT provides tools to easily track employees use of time, report and analyse time utilisation and employee contributions.

Up to nine user defined analysis codes are provided in ALERT to allow powerful analysis of employees in pre determined groupings.

ALERT's employee performance reporting facilities cover utilisation and both billable rates and contribution rates of employees. Both rates being crucial to properly understand employee performance.



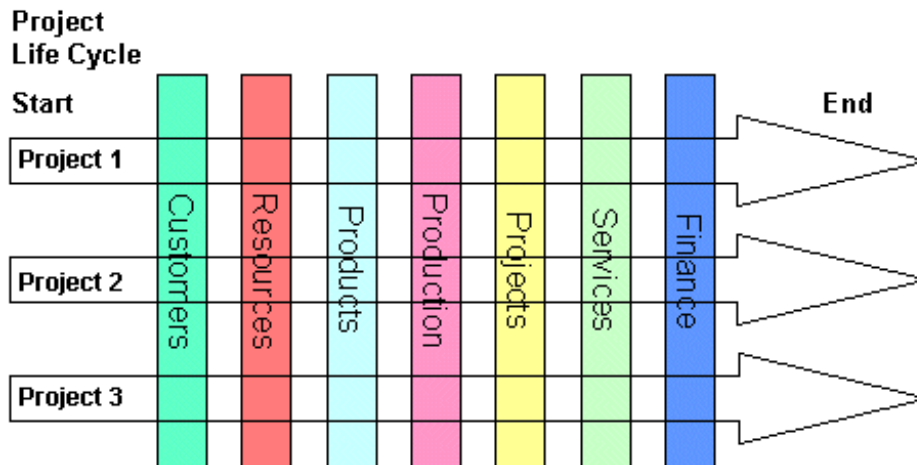


## Key Functions

- Resource work calendars
- Timesheet entry
- User defined timesheet approval processes
- Weekly timesheet close off by employee
- Resource availability and skill matching facilities
- Daily employee resource planning linked to project resource planning
- Flexibly plan resources at high project levels or detailed activity and work items by day
- Flexible multi dimension summary and drill down analysis of resource plans and actual to plan
- Resource schedules visible on line by all employees
- Easily check that all timesheets have been entered
- Timesheet posting process ensures that all invoicing and time based reports are reporting on accurate approved time details
- Restrict timesheet entry to only those services allowed for the project
- Enforce capture of specific service billing options and the level of detail required for the project at timesheet entry
- Employee billing recommendation override in timesheets
- Automated invoice generation from timesheets
- Invoice at service and employee level if required
- Accurate period based revenue and gross margins of services and employees if required
- Employee gross cost details kept including all on costs by hour and annual
- Standard employee charge out rate pricing facility
- Employee billable rate and contribution rates reporting - both graph and multi dimension summary and drill down analysis
- Employee billable hours ratio reporting - both graph and multi dimension summary and drill down analysis
- Customer Service reports generated directly from timesheets
- Flexible timesheet reporting for client sign off
- Employee project responsibilities recorded



## Management By Projects



### Introduction

ALERT uses projects to manage all business activities. This is often termed "Management By Projects". Management by projects is different in many respects to Project Management.

Management by projects treats all aspects of ongoing operations as projects in order to apply project management principles to them. This includes one off projects which are generally a temporary endeavor undertaken to provide a unique product or service.

While ALERT manages these unique fixed duration projects it also allows on going operations to be treated as projects. This has a number of benefits in that all services, including revenues and costs of these services, may be recorded against these operations for better management and control.

To effectively "Manage By Projects" **all** activities in the organisation are performed against a Project. This includes all activities for customers, the organisation itself and any other activity that may arise. It is essential that ALL activities in the organisation are represented by a project.

Some projects do not warrant a separate project because of the small amount of effort involved. In these cases a standard project that references the customer, product and the category under which the work was carried out is used.

### At a Macro level.....

Recording all employees time and revenues by projects enables the organisation to capture all revenue and costs at a low level.

Grouping projects allows the organisation to categorise the types of business that it undertakes and therefore get a view of profitability or otherwise of separate business activity. This provides a high level Macro view of the organisation for strategic decision making.





## At a Micro level ....

Using projects to manage business activity allows project management principles to be applied. The level of control is determined by the type of project. A larger more complex and critical project would generally command a higher level of control than a lower level project. ALERT's unique design caters for projects at both ends of the spectrum.

Simple low value projects may be managed in ALERT at a level where only basic information is captured and entered for the project. More complex high value projects may be managed at a very detailed level as is deemed necessary.

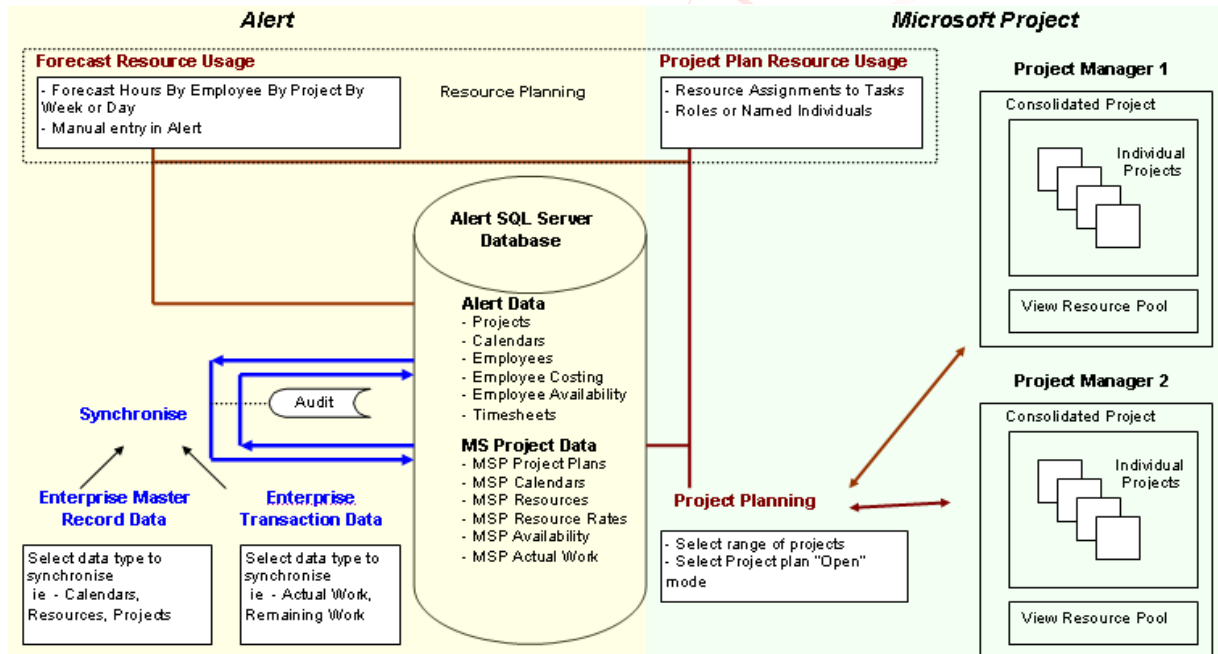
## Key Functions

- Fixed duration and ongoing projects capability
- Fixed Price, Time and Material and a combination of both for service pricing by project
- Multiple version estimates, quotes and agreed quotes with print facility
- User defined project categories
- User defined status / progress options
- Project resource planning with resource availability assistant
- 9 user defined project analysis codes
- Multiple project billing schedule details including estimates and approved orders
- Project actual billing status view with billing schedule details
- Project scope management with deliverables, milestones and project linked requests, software change orders, tests and others
- Project responsibilities management
- Control, by project, over the level of details required to be entered in timesheets
- Control, by project, over agreed / allowable services for the project
- Control, by project, over multiple billing rates for same service
- Service pricing maintainable by project - both service price to use and price of service
- On line, real time, single page status view of each project
- Powerful project search form available where all project code fields are used
- Projects linked to:
  - Customer request management
  - Resource scheduling and management
  - Timesheet entry
  - Billings
  - Service management / delivery
  - Software production / delivery
  - Testing
  - Revenue and margin analysis
- Summary Macro view project reports
- Detailed Micro view project details
- Project performance indicators to highlight under / over performance i.e. billable rate, contribution rate
- Period end Unearned Revenue and Unbilled Revenue by project for accurate period based reporting of revenue and costs by project



# Project Planning Alert

9



## Introduction

Project Planning Alert is a module that assists organisations to plan and track multiple concurrent projects, using Microsoft Project, as well as planning and managing Resource Usage.

Managing multiple concurrent projects using Microsoft Project is made much simpler through the use of facilities provided in Alert. A simple example of this is the ability to update Actual time from Alert Timesheets to all required Microsoft Project Plans with one Alert update. Alert will update Actual Work against specified Tasks on a day by day timescale exactly as recorded in Alert.

As well as making an otherwise near impossible task simple and efficient Alert also keeps a record of the update and takes out record locks on all projects prior to the update to ensure they will all complete successfully.

A list of the capabilities of Project Planning Alert is provided below.

## Project Alert V's Project Planning Alert

Alert has separate Project Alert and Project Planning Alert modules. The primary difference is that Project Alert provides basic Project Management facilities while Project Planning Alert provides Project Planning and Tracking facilities.

Project Alert is more concerned with using projects to gain control over activity within the organisation while Project Planning Alert extends this to include project planning and resource assignments to control activities at the task level.

## Key Functions

The primary functions of Project Planning Alert includes:

- Tightly integrated with Microsoft Project (Desktop)



# Project Planning Alert...

# 9

- Supports Microsoft Project Version 2000 and higher
- Microsoft Project Plans stored in Alert SQL Database. Benefits of this are:- User access control to data, data backup, robust database, scalability and others
- MS Project Plans invoked from within Alert for planning and editing. NB: Any planning currently performed by an organisation using MS Project may be continued when using Alert.
- User defined "Project Planning" runs created so that repeat editing of MS Project Plans is simplified and made more efficient.

For example:- Project Manager "Tom" will be repeatedly performing updates to Project "xyz". Tom sets up a number of runs that each perform a specific function for the project. One run may be to update "Actual Work" from Timesheets against this run. Tom simply has to go to this run invoke it to collect outstanding timesheets, review them and then update the project plan. Tom can then open and review the plan using another saved run. A few keystrokes and what would otherwise take hours is achieved in a matter of minutes.

- Microsoft Project Plans generated by Alert against Alert projects using data within Alert. This simplifies the task of adding new Project Plans.
- Alert centrally controls enterprise master data in MS Project Plans such as Resources (Employees), Calendars, Resource Costing, Resource Availability and Actual Work. This ensures consistency between all MS Project Plans. For example: Toms availability will be consistent between Alert and all MS Project Plans.
- TWO entirely separate resource scheduling data sets – 1. recorded directly in Alert and analysed using MS Project (Forecast Resource Usage) and 2. recorded in individual MS Project Plans and analysed using MS Project (Planned Resource Usage). This provides for forward resource usage estimating as well as resource planning.

- Generated Microsoft "Analysis" Project Plans for analysing multiple projects. Sometimes referred to as Project Portfolio views.
- "Remaining Work" able to be recorded against Tasks in Alert Timesheets and updated to MS Project Plans in the same manner as "Actual Work".
- Visibility of MS Project Plan details including Tasks and assignment details within Alert screens. For example: Task Name, % Complete, Assignments etc
- MS Project Plan Task and Assignment Search Forms within Alert. This allows users to quickly search for Tasks and Assignments within Alert and without having to open MS Project and Project Plans.
- Able to control the Project Plan data that is to be captured when entering timesheets in Alert. For example:- force the employee to record remaining work when they record actual work against a task OR ONLY allow time to be recorded against a project plan task IF the employee is assigned as a resource against the task OR ONLY allow time to be recorded against a project plan task IF the task is not yet complete etc
- Analyse "Forecast Resource Usage", "Planned Resource Usage", "Resource Availability" and "Actual Resource Usage" using the power of MS Project.
- MS Project "locking" to ensure updates are executed without any issues and performed sequentially.
- Audit Logging of all MS Project plan creation and maintenance within Alert.
- Forecast Resource Usage reporting is provided in Project Planning Alert. This includes Forecast Resource Utilisation, Forecast Revenue and Forecast Billings. Alert also provides reports of Budget V's Forecast and Forecast V's Actual.



## Introduction

ALERT provides you with the tools to effectively manage and report Sales, Revenue and Billings.

The sales process starts with recording a quote for the supply of a service, product, software or some other type of item.

ALERT allows the user to record multiple quotes and even versions of quotes. Billing schedules may be associated with the quote and the quote either printed or saved as a Adobe .PDF file and sent to the customer.

Quotes are flexible with the ability to change quote labels and include user defined text to suit the companies preference for the look and feel of quotes.

On acceptance by the customer quotes are updated to reflect their changed status as an order.

ALERT provides reports that allow the company to report Sales, Revenue and Billings based on the quote and order details recorded within it.

By recording all quotes and orders in ALERT it is possible to understand outstanding and future Billings and Revenue.

Quotes and orders may be linked to projects and form the basis of the project revenues and billing requirements. Both Time and Material and Fixed Price services may be recorded on quotes and orders.

ALERT also records quote items, order items, sales, revenue, billings, costs and margins as one of three types. Either Service, Software, Product or Miscellaneous. These four categories are reported seperately throughout ALERT to allow analysis by these types. Items within these categories such as by individual product may also be reported.

Following on from quotes and orders in Sales Alert are the invoicing facilities. The invoicing facilities in ALERT provide the ability automatically generate invoices for Time and Material Services, Fixed Price Services, Products, Software and Miscellaneous items.

Invoice details are recorded against the respective timesheets and orders to prevent duplication and provide a full audit trail.

Manual Invoices may also be entered as well as reversing invoices, automatic generation of credits and other capabilities.

Invoices may be printed or saved as Adobe .PDF files and forwarded to the customer electronically if required.

An interface is provide to common accounting packages for customer invoices. General Ledger coding rules may be defined in ALERT so that the invoices can be directly interfaced and are fully coded to update the general ledger as well as the debtors ledger in the accounting system.

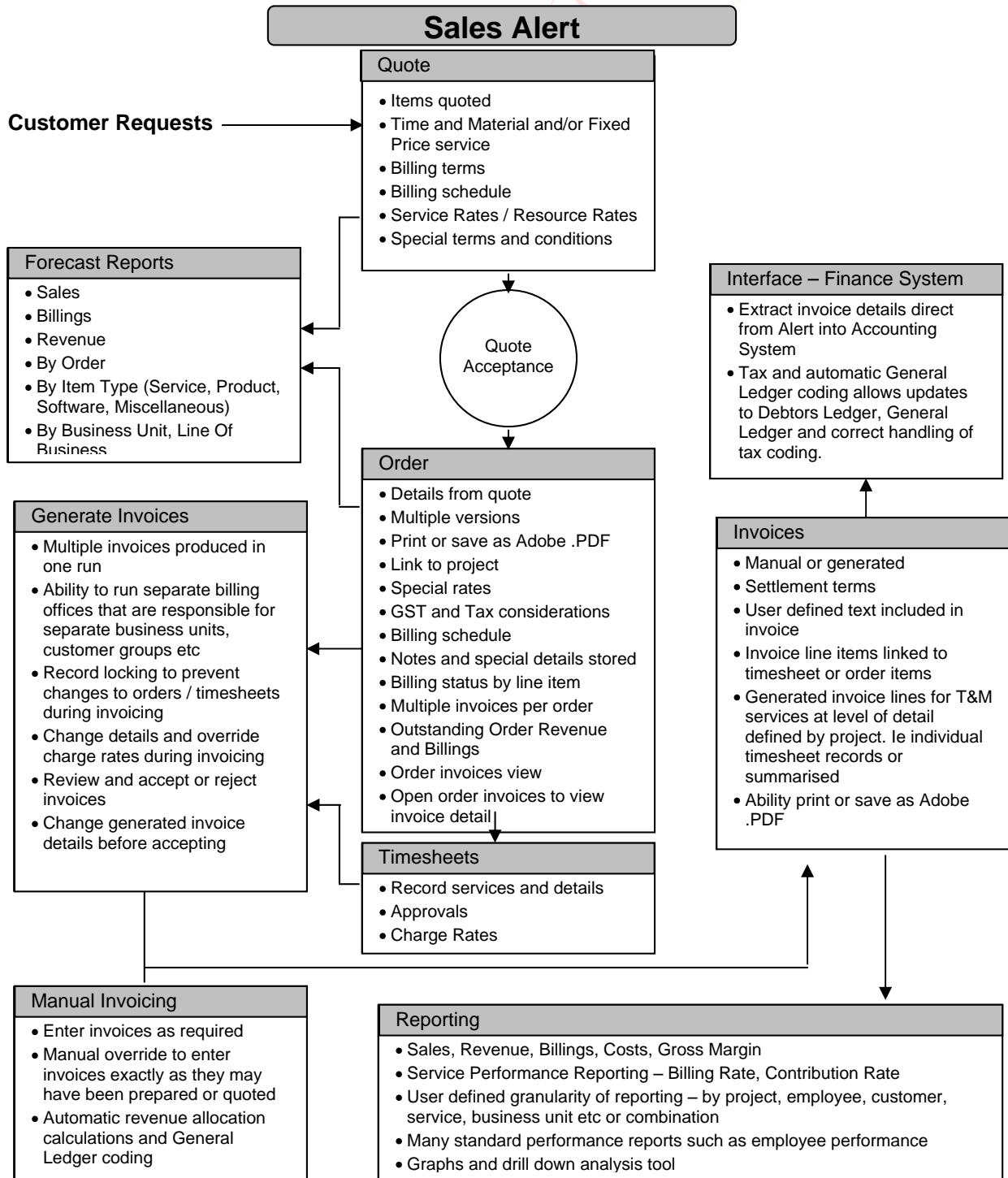
Sales Alert is the front end billing system that is able to get control over and streamline your billing process.

A key strength of ALERT is that it automatically manges "Earned Revenue" as distinct from Billings and Sales. ALERT simplifies the task of reporting Revenue Earned which in most organisations is very difficult and time consuming.

This allows the company to report true Gross Margins. Earned Revenue and Gross Margins may be reported at the level of granularity required such as by employee, by project, by customer etc.

Sales Alert includes many Sales, Revenue, Billings, Gross margin and Performance based reports. Please ask for a copy of the ALERT Highlight Reports Booklet to review the types of reports available.





## Key Functions

The primary functions of Sales Alert includes:

- Ability to record quotes and orders
- User defined text on quotes and orders
- Multiple versions of quotes and orders
- Ability to print or save quotes and orders electronically as Adobe .PDF's.
- Ability to manage Time and Material as well as Fixed Price services on a single order and project.
- Four categories of quote and order items:- Services, Products, Software, Miscellaneous.
- Convert quote to order on acceptance by customer
- Quote / Order billing schedule and billing milestone management
- Capability for multiple order per project and multiple project per order
- Automatic generation of Time and Material billings based on approved timesheets and charges.
- Automatic generation of Agreed Charge billings.
- Multiple invoices per order. Ability for orders to manage ongoing billings.
- Ability to nominate, by project and or by customer, the level of detail to print on service invoices ie one invoice line per timesheet entry or summarise timesheet entries by employee or some other level.
- Multiple billing office capability. Will handle multiple billing offices that are responsible for the billing function of certain activities ie by geographical location, customer groups etc
- Earned Value and Gross Profit management and reporting at optional levels – Project, Employee, Customer, Line Of Business, Profit Centre etc
- Forecast billings, revenue and cash flow by Project, Customer, Profit Centre etc
- Standard and flexible service pricing by service/employee/project including multiple rates per service, employee and project.
- Sales, Billings and Revenue management by order
- Ability to view list of order invoices from order screen. Drill down to invoice details.
- Manual Invoice and credit entry
- Export invoices to accounting system
- WST and GST taxation options
- Automated matching of Revenue to Costs for accurate period Margins
- Activity based costing for true Gross Margin reporting
- Powerful and flexible sales reports, graphs and drill down analysis
- Customer billing reports including actual and forecasts
- Customer sales and margin reporting and analysis



## Introduction

ALERT provides you with the tools to effectively manage your suppliers.

In order to deliver products and services to your customers you may have to deal with a range of suppliers, from individuals to companies, for the supply of additional services and products.

These additional services and products are elements of the project that must be managed effectively to ensure satisfactory outcomes including projects on time and on budget.

ALERT provides facilities in Purchase Alert that are similar to those found in Sales Alert.

Purchase Alert provides the ability to enter quotes and orders for suppliers. Supplier invoices based on these supplier orders may be entered and the costs allocated to the appropriate projects.

The Quotes and Orders may be assigned to one or more projects to provide visibility over the anticipated supplier costs for the project.

Purchase Alert also provides an ability to calculate costs based on time recorded by suppliers employees for services. This is referred to as calculating costs on a "Cost Incurred" basis.

ALERT performs "Cost Incurred" calculations and records the calculated costs details against projects. The level that the costs are calculated may be determined when configuring ALERT. As a minimum ALERT will always capture costs by project and supplier however this may also be required by supplier resource or other level.

Actual Supplier Invoices may be recorded in ALERT or the user may choose to use the calculated costs only.

In order to be able to report Gross Margin by item type, Purchase Alert records costs as either Service, Software, Product or Miscellaneous. This is consistent with Sales Alert.

Internal costs such as the cost of services provided by your organisation are also managed using Purchase Alert.

Your organisation is treated as another supplier and ALERT calculates the costs of services provided by your employees against all projects.

ALERT has flexible pricing rules that allow you to determine how the cost of services is to be calculated. Costs may be retrieved from employee costs, including effective date capability, or from a standard cost per type of service or for a particular project and so on. Different costing rules may be set for each project and even for each supplier and resource within the project.

ALERT provides summary and detailed reports of project costs. The level of granularity in reporting may be determined by the user and may include cost item type, supplier, resource, service, customer, line of business, business unit etc.



## Key Functions

The primary functions of Purchase Alert includes:

- External service provider resources time and cost management
- Supplier purchase order creation and management
- Supplier services reporting including the ability to include costs by timesheet entry for detailed cost analysis
- Services, Software, Products and Miscellaneous items cost management by projects
- Supplier service charges forecast and actual reports
- Supplier Invoice and credit entry for project costing
- Incurred costs calculations. Automated Unincurred Costs and Unbilled Costs for accurate project costs by financial period
- Automated matching of sales to costs for accurate period margins
- Activity based costing for true Gross Margin reporting
- 





# Request Alert

9

## Introduction

Pro active customer service requires processes and systems that ensure that all customer requests are logged, allocated to resources for action, resources notified, monitored for attendance to, escalated if required, accurately billed and completed.

Customer requests are opportunities for your business and need to be treated as such. Ensuring that no requests 'fall between the cracks' means that your customers will be receiving the attention they deserve.

Monitoring performance in responding to these requests is equally important. Agreed customer response times are written into a lot of contracts. Having the systems in place to manage performance to these performance criteria is crucial.

ALERT's customer request management module has been developed to with these issues in mind. It provides not only the tools to process requests but goes that step further to pro-actively assist to meet these performance goals.

Request management starts with an initiating request. ALERT handles both internal and external customer requests. The request may be logged within the company by staff through the receipt of a faxed, posted or phone request.

Alternatively the customer may log their request over the Internet. In either or both cases ALERT can be configured to automatically assign responsibility for these requests and to send a user defined e-mail message to the appropriate staff to provide an immediate response to the customer.

Each request is logged as a user defined type. Requests for example may range from application assistance, consulting request, software development request, BUG fix request.

Additional information may be captured against the request in the form of User Defined Fields, Notes, File Attachments and more to provide a greater chance of a quality response.

A request queue is available to allow a quick view on current requests. Completed requests may also be reported in the queue with rapid access to provide reduced response times to follow up enquiries.

Requests are then progressed in ALERT. The request module is tightly integrated to the other ALERT modules. For example time spent on individual requests may be recorded directly against the individual requests in timesheets.

Requests may be attended to immediately and details recorded against the request. Alternatively the requests may result in a project. In this case requests are allocated to a project to manage and control the project effort.

The project may for example be a BUG fix project or a consulting project. This allows ALERTS powerful 'Management By Projects' facilities to be used to manage the effort required for the initiating request or requests. Project costing, resource scheduling, billing details and more are all then managed for the initial request.

Requests are also integrated to the Product Management / production module of ALERT. Each request may be referenced at the production work order level. In this way a complete history of the work effort is captured against the request.

Service Level Agreements may be recorded at many levels and progress monitored against these. Alert can be configured to notify the required people based on roles and responsibilities when SLA's are being exceeded.



## ***Request Management....***

**9**

Request performance statistics facilities monitor request progress and report on request response performance. The statistics are available as graphs with flexible drill down reporting capabilities

Time Zones and daylight saving variations impact the ability of a system to correctly manage requests. Users need to be able to log and manage requests in their time zone. Request Alert correctly handles time zones from Web Services through to SLA's and response times etc.

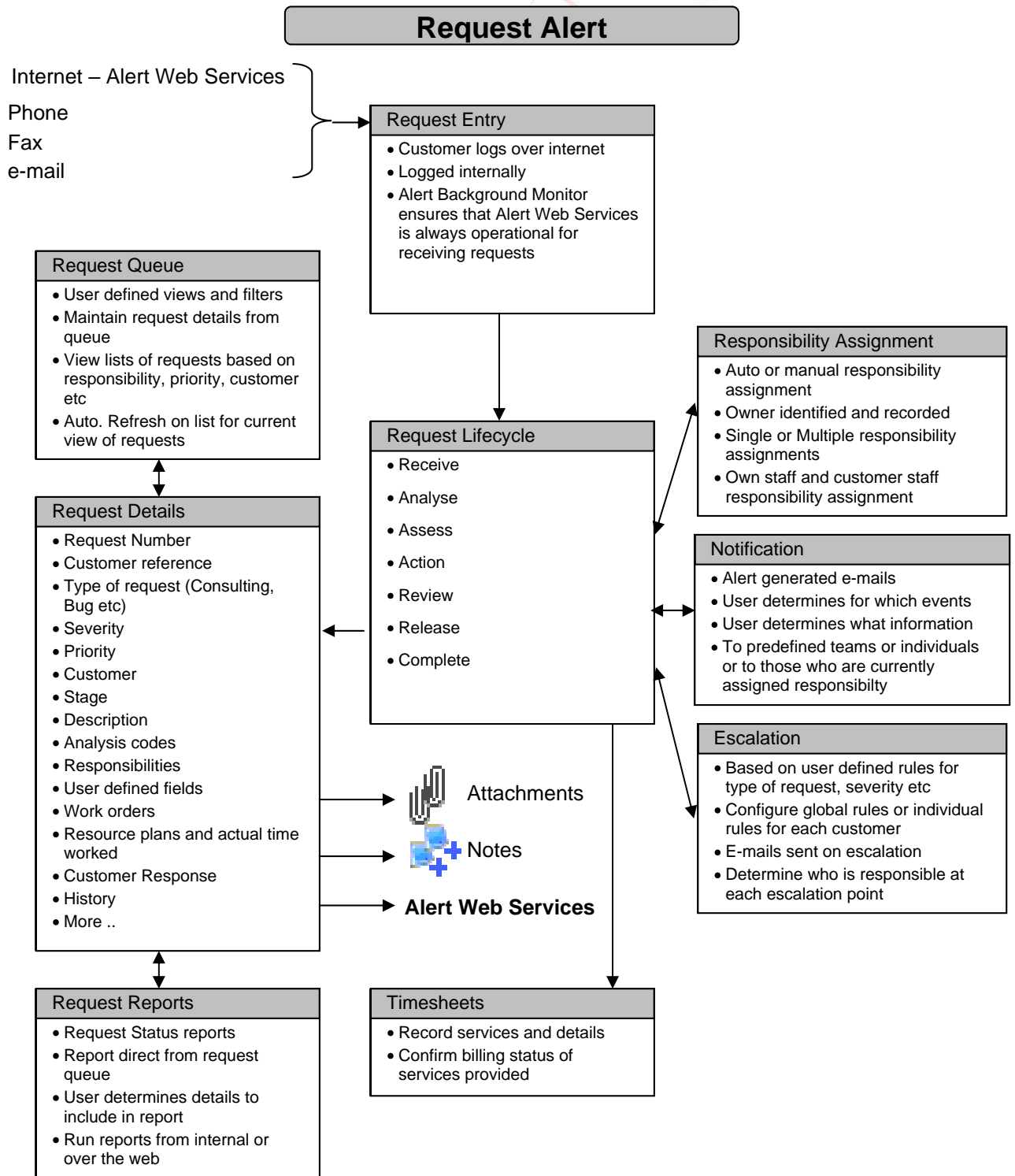
A number of reports both internal and external customer reports are available for management and reporting of requests. Dynamic real time Web reports are available on Customer Requests by the customer. Security levels control access to this information.

In summary the request management facilities give you the ability to constantly monitor and improve performance in response to customer needs.



# Request Management....

9



## Key Functions

- All types of requests handled (service requests, software BUG issues, quotations etc)
- Internal and external customer requests
- On line and Web based request entry
- Time Zone and Daylight Saving capability for internal and web based users
- Integrated to product management for specific application object / version issue logging
- Request logging linked to licensing so that customers may only log issues for software that they are licensed for
- Assignment of individual requests to projects and employees
- On line and Web based progress reporting
- Customer and Internal request priority settings
- Fault class tracking of requests / issues
- Request submission details
- Multiple request notes, date and user based
- User defined categories, types, priorities etc
- Powerful Requests Queue Manager with user defined views and filters
- Automated responsibility assignment and management
- Automated e-mail notification of all events related to Requests. Including differentiation between Internal and External updates to requests
- Unlimited User Defined e-mail templates
- Internal and External e-mail notifications able to be configured totally separately for each event as well as use different e-mail templates. This allows automated customer notifications such as receipts, confirmation of requests or other information logged, request progress details and much more
- Multiple requests assigned to one project and single requests assigned to multiple projects
- Timesheet entry by Request. Optionally enforce entry of request reference
- Service Level Agreements management. Unlimited number of SLA's
- Escalation for SLA's exceeded with flexible rules for notification based on times escalated
- Data Access Permissions for individual Requests, Request Notes and Request Attachments
- Request Attachments – both internal and external (via Web)
- Request Attachments via Web under strict access control. View, Add and Get functions with specific access permissions.
- Record request reference against work items such as testing and software development work orders
- Report statistics of response performance to requests - graph and multi dimension analysis
- Flexible internal and external request management and status reports
- On line and Web based request management reports



## Introduction

Practical software product and development management strives to achieve a number of objectives:

- Quality
- Consistency
- Delivery to expectations, in particular user and time expectations
- All changes documented (technical and user)
- Changes traceable by object and version
- Matching changes against initiating requests
- Software delivery control

ALERT is not a technical tool such as a source code control tool, it is a tool for managing the practical issues of software products and development management.

ALERT starts by recording all of the objects that comprise the software product. It records the owner of the intellectual property as well as who the software product is licensed to.

All requests for software product work are logged in the Customer Request Module and these are assigned to a project. A project may then have software development work carried out.

All software development is controlled using the allocation of Major and Minor product version references. In this way a history of changes to the product is captured.

Work Orders are created and are used to record the initiating request, the objects being worked on, technical change and user change notes.

The Work Order forms the basis of the controlling document for each unique change made to objects.

Work Orders may even have employee time recorded against them should this level of detail be required for the customer.

Testing of each change becomes a matter of reviewing each Work Order and determining the tests that are required. It is even possible to automatically build a test for each Work Order. This may or may not be appropriate for particular situations.

This process of controlled development and product management provides the organisation with important and meaningful information.

For example it is possible to identify for an object, for a particular version, all changes from that version back. The date of the change, who applied the change and even the initiating request for the change are all kept within ALERT.

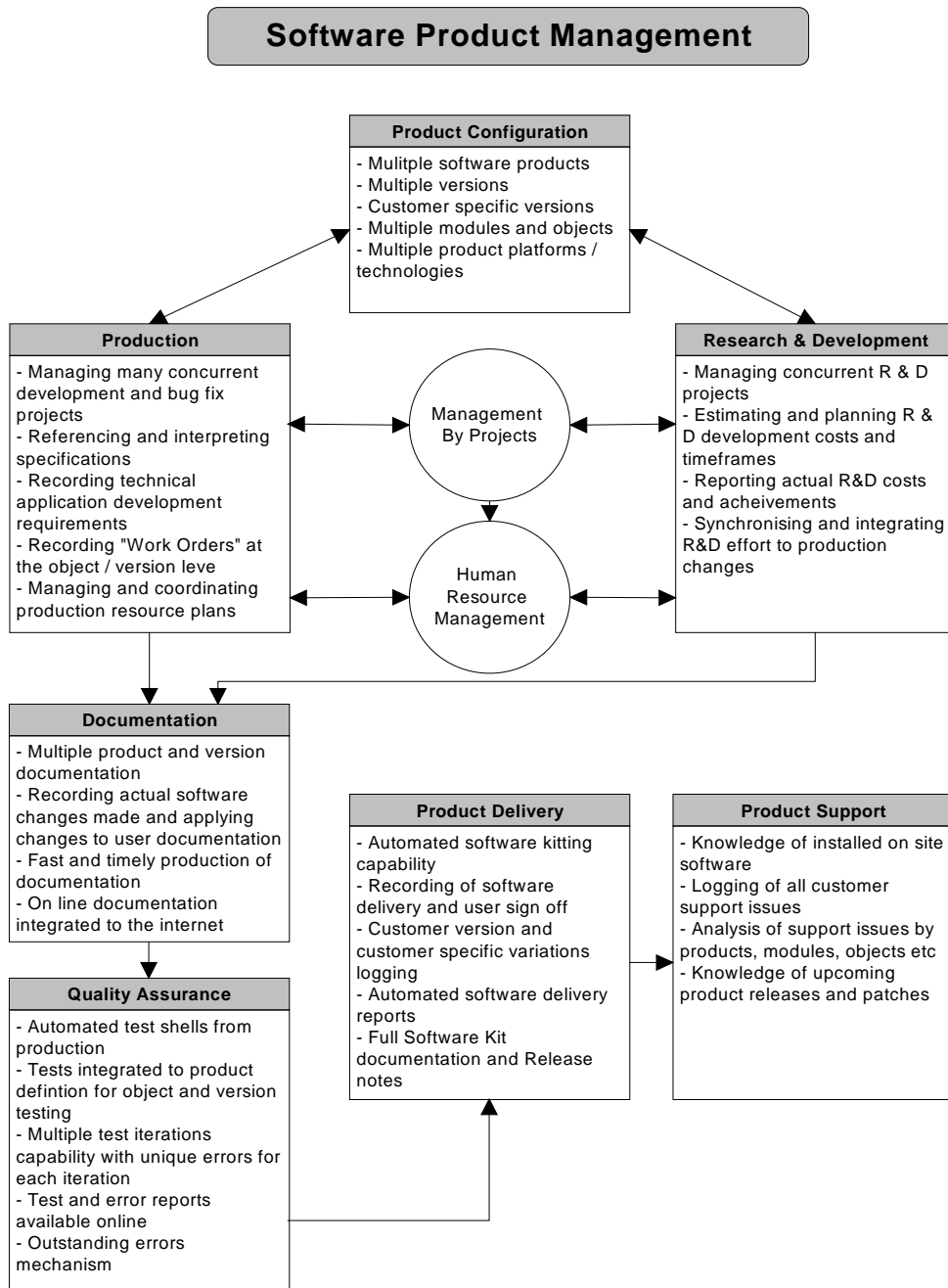
Delivery of software is also able to be recorded in ALERT. This provides the business with the ability to know not only what software products customers have but also which versions / releases and also any customised versions of objects.

This is a very powerful tool as it is possible to determine, for customer support for example, what software the customer is running.

## Key Functions

- Manage multiple software products
- Manage multiple product versions
- Manage customer specific versions
- Define software products objects
- Controlled software development
- Development management – work order management
- Product documentation produced from development
- Integrated development and testing modules
- Software delivery processes and controls





## Introduction

ALERT's test management facilities provide a structured recording and management tool for the testing of software products.

The main benefits of using ALERT's testing facilities are:

- A defined process is followed for the creation and performance of a test
- All details that are required for precise test management are captured
- Full visibility to all staff of tests and errors through to the completion of tests
- Integrated with Project Management, Human Resource Management and Software Product Management

Software tests are commenced with the creation of a Test Group. Each test group must be assigned to a project. The project may for example be a software enhancement project, R&D project or bug fix. It could also be a project specifically created to perform some ad hoc software testing.

Individual tests are then created within the test group. A separate individual may perform each test. The test is updated with a purpose and full description of the test to be performed. Software objects with specific versions are then selected for the test to be performed against.

At this point a specific Work Order from development may be selected and the test shell built automatically. This function builds the test with all system objects and versions. Objects may then be removed or added to represent the test that is being performed.

Before a test is carried out an iteration is added. This records who performed the iteration, when it started and finished and if passed.

Errors identified during the carrying out of the test iteration are recorded against the iteration with specific details as the error description and the system objects that were impacted. These are selected from the system objects that were assigned to the test.

All tests are performed and then a test report and an error report produced. These reports are used to provide specific details of the tests and errors to the software development team.

Upon remediation of the errors the tests may be carried out again against new iterations. Any outstanding errors are flagged as fixed or not and any new errors reported against the new iteration.

At a High level all test groups may be reported to manage all testing that is being performed by the test team. Budget and actual commencement and completion dates are managed.

Test groups are linked to Human Resource planning facilities. This allows planning and actual details to be captured against individual test groups if required.

Capture of performance details for testing such as time taken in testing, turnaround of errors, how many iterations were required, how many errors per iteration and more are all captured.



## Key Features

- Ad hoc test creation and management
- Test priorities
- Test status / progress management
- Budget and actual completion dates
- Maintenance and management of any number of test projects
- Automated test shell generation from Project Work Orders
- Tests linked to Work Orders with automatic build of Work Order software objects and versions
- Tests linked to software products – individual software objects and versions assigned to tests
- Flexibility in test recording and management – ability to call in **any** system object and version for inclusion to the test
- Multiple test iterations managed with employee and date started and completed being maintained
- Multiple errors may be recorded for each iteration
- All errors are recorded and closed by recording the test iteration where the specific error was fixed
- Single screen on line status view of iterations, errors etc for each test





# Web Services

# 9

## Introduction

A significant feature of RequestAlert is its integration to the Internet.

The Internet is a conduit that allows greater levels of interaction with third parties as well as providing greater efficiencies.

Clever use of the internet in conducting certain types of business is able to bring a number of business benefits.

ALERT Web Services is tightly integrated with Request Alert to deliver a system that streamlines Help Desk, Issue Tracking and Customer Support processes.

Typically Customers log requests over the internet using ALERT Web Services and then track and interact with the Service Provider as the Request or Issue is progressed through its life cycle.

Alerts Web Services is scaleable to allow large numbers of people to be logging, updating and tracking requests simultaneously. The support processes are automated to streamline the process of delivering services against these requests.

Automated Notification of events such as "New Request Logged Via Web Services" are able to be configured in ALERT as well as automated Responsibility Assignments.

ALERT allows support processes to be mapped including responsibilities, notifications, service level agreements, escalation triggers and more.

Customers can be proactively kept informed by also configuring ALERT to notify them of particular events at certain stages in the lifecycle of the Request.

Alert Web Services is highly configurable, by user, to control the types of functions they can perform as well as the data that they are able to submit and access.

This gives you control over how you manage the data associated with requests.

ALERT Web Services uses the internet to provide solutions to the following business problems:

### Problem:

Not all customer requests are being logged – some seem to go missing or are not logged correctly

### Solution:

ALERT's Web service desk provides customers with their own Web based request logging facility. This updates the ALERT database with the request.

### Problem:

Customer requests not being attended to by staff as they are not made aware or forget the request.

### Solution:

ALERT's on line Web based customer request logging facility automatically sends an e-mail to nominated staff to advise them of the request with full details. It is then monitored by ALERT for activity.

### Problem:

Customers outstanding requests / issues list is not the same as yours

### Solution:

By using the Web based customer request / issue logging facilities there is one common list being used by both your customers and you. Web request / issue status reports may be run on line by the customer or you at any time

### Problem:

My staff spend a lot of time entering customer requests / issues and then responding to these through the reconciliation and reconciliation of status reports etc

### Solution:

ALERT's Web Services will reduce your costs and provide a higher level of service to your customers

The above are very tangible and real problems faced by most IT businesses. The ALERT solutions are practical and efficient.



# Web Services...9

Request Status Report - Microsoft Internet Explorer

Address: http://150.101.228.101/AlertWebServicesv48/ServiceDesk/RequestStatus/RequestStatus.ASP?WCI=Criteria&WCU=

### Request Status Report

Results:-

Customer: Department For Education and Children Services  
 Type: Network Consulting Request  
 Software Product: TEACH BEST-Training Management  
 Severity: 1 MAJOR

Request	Cust. Ref.	Received	Target Date	Stage	Title
00000412		06/12/2002 09:45	19/12/2002 23:00	Logged	New job

Type: Problem/Error  
 Software Product: Not Applicable  
 Severity: 1 MAJOR

Request	Cust. Ref.	Received	Target Date	Stage	Title
00000362		30/07/2002 15:52		In Progress	Implement contacts database

Severity: 2 MODERATE

Request	Cust. Ref.	Received	Target Date	Stage	Title
00000363		30/07/2002 17:26		Logged	email message re submitted by fields
00000377		01/10/2002 12:59		Logged	Teacher scheduling error for public holidays

Severity: 3 MINOR

Request	Cust. Ref.	Received	Target Date	Stage	Title
00000369		24/09/2002 08:26		Logged	The page break is in wrong position
00000378		03/10/2002 16:36		Logged	Issue with reallocation of schedule
00000379		08/10/2002 17:41		Logged	the teacher skill module is not starting
00000383	Test Add	09/10/2002 09:20		Logged	Test Add

Software Product: TEACH BEST-Training Management  
 Severity: 2 MODERATE

Request	Cust. Ref.	Received	Target Date	Stage	Title
00000365	RT-9785	31/07/2002 11:25		In Progress	Multiple contact on file not being picked up error

Severity: 3 MINOR

Request	Cust. Ref.	Received	Target Date	Stage	Title
00000370		24/09/2002 08:35		Logged	The drop down list is not correctly populated
00000372		26/09/2002 13:31		Logged	The scroll bar is hidden
00000395		04/11/2002 14:28		Logged	Error with leave calculation
00000398		22/11/2002 10:15		Logged	please add newer
00000432		27/06/2003 15:17		Logged	test new request

Severity: 4 NO IMPACT

Request	Cust. Ref.	Received	Target Date	Stage	Title
00000364		31/07/2002 09:40		Logged	test submitted by location

Request Maintenance - Confirm - Microsoft Internet Explorer

Address: http://150.101.228.101/AlertWebServicesv48/ServiceDesk/RequestMaintenance/RequestMaintenance.ASP?WCI=General&WCU=

### Request Maintenance - Confirm

General | Software | Notes | Attachments | View

Please Confirm the following Request Details:

Our Reference: **00000379** Title: The teacher skill module is not starting

Customer: Department For Education and Children Services Sent: 08/10/2002 5:41:33 PM

Your Reference: Submitted by: Mary Jones

Type: Problem/Error E-mail: jones@alerbit.com

Stage: Logged

Severity: 3 MINOR

Priority: Priority 5

Request: The teacher skill module is not starting when the user selects it from the Quick Launch menu. Response: The initial analysis appears correct.

It appears that the Quick Launch menu has the context in error. The Module name comes up but another module that is not licensed attempts to start. The issue will be investigated to confirm this and you will be advised of when a patch will be made available.

Software Objects:  
 Software Product: TEACH BEST-Training Management (None)

Notes:

Note Type	Date	Time	User	Notes
Response To Customer Request	16/07/2003	9:39:16 AM	Administrator	The issue has been analysed and you were correct in the initial analysis. The quick launch menu is activating the wrong module under certain circumstances.
Initial Customer Request	08/10/2002	5:42:38 PM	jones	This will be addressed in a future patch release to be advised. This has happened before but for a different module.

Attachments:

Attachment Type	Date	Time	User	File Name	File Size	File Type	Get File
Customer Reference Material	08/10/2002	5:42:56 PM	jones	Attach1.txt	1 KB	Text Document	N/a



## Key Features

- Web based request logging and reporting by customers, suppliers or anyone external to the organization that is provided access
- Automatic assignment of internal request reference number with advice sent to customer
- Automatic or manual responsibility assignment against requests logged either internally and / or external over the web.
- Ability to retain an owner on requests throughout their lifecycle.
- Secure password controlled access. User log on with passwords to both Internal and Web Services Request Alert
- Form, function and data based security in Web Services. Customers and staff only see the data that they are allowed to see and are only allowed to perform the functions that you decide they should.
- Full event tracking of events raised from Web Services with automated and configurable notifications on these events
- Web Services users able to be kept informed of the progress of requests through automated e-mail notifications when certain events take place. For example when a new Note is added to the request the person that initially submitted the request over the web may be automatically sent the Note information.
- Full control over Data Access Permissions and Function permissions for each Web Services user. This allows the user to restrict access to specific request data, by function, within ALERT based on certain rules and also by individual piece of information such as Notes if required.
- Web services users may be able to View Only, Add Only, Change Only, or combinations of these. These functions may be defined for certain types of requests, by request stage, for certain customers etc
- Web based file attachments against Requests with View, Add, Get functions
- File attachments under data access control. For example the customer may not even be able to view or see certain attachments against the request.
- Web based customer request reporting – both completed request and outstanding requests
- Summary and Detailed online Web request Web reports available
- Powerful search criteria available using Web Services to find requests. For example find all requests submitted using a search on text in Notes attached to requests etc.
- Requests tracked by ALERT against Service Level Agreements. Requests that exceed SLA's triggering escalation events that can subsequently trigger e-mails to notify management
- Automated Time Zone and Daylight saving facilities based on user log on ensures that everyone is entering and looking at dates that are in their time zone.
- Availability Calendars and Time Zones work together in synchronization to manage when staff are available to attend to requests. SLA's and escalation are then managed against these parameters. This also takes into consideration that multiple teams in different time zones may work on requests at different stages in their lifecycle.
- Customer specific service desks dynamically managed using ALERT – no HTML editing and maintenance of web pages required
- Control the default values displayed in new requests by customer. Control the sequence of data that is displayed in certain fields and much more .....



## **Introduction**

This module of ALERT contains the system wide parameters and settings that control how ALERT is to function in a number of areas.

## **Company Details**

Details such as company name, address, A.C.N., company logo and others are able to be maintained.

All reports and system documents produced such as invoices use this information to print on the report or form.

## **Calendars**

ALERT maintains a financial calendar and a management calendar. Each calendar is totally independent of the other.

The financial calendar allows the user to associate days with financial periods and financial years. The financial calendar is used for all financial reporting. For example sales and gross margin reports are based on financial periods.

The management calendar also allows the user to associate days with management weeks, periods and years. The management calendar is used to report information on a more regular week by week basis. For example employee utilisation, customer request movement and balance statistics can be produced on a week by week basis.

## **Deployment Parameters**

ALERT is deployed with a client and server database. Multiple server databases may be setup. For example a Test database as well as the Production database.

The client may switch between these databases using the deployment parameters switch.

## **System Parameters**

ALERT has many configuration options that allow you the user to determine how the system will function. This provides you with the most flexibility so that ALERT reflects the way that your organisation functions.

These parameters are maintained in System Management.



# Implementation Plan

10

A proper implementation plan is essential for a critical business system such as ALERT.

There is no need to take or to introduce any risks leading to possible system failure. However, there are many 'horror' stories about the introduction of new systems because shortcuts were taken.

First and foremost, there must be the right level of commitment to make the new system work. In a smaller company this may be in the hands of a director. Provided the necessary time to do the task is available this may be an ideal answer.

In a larger company, the implementation responsibility is likely to fall upon a project manager or team. In this case it is still absolutely vital that the project is backed at a director level. Otherwise people can easily lose sight of the business objectives behind the new system.

VBS have a clearly laid out approach to implementation which is described in outline below. However it is only a theoretical 'starting point' for any real life implementation. It needs the right people to make it work. The first step is to sit down and work out a realistic plan for the specific needs of your company.

The major steps in any plan are as follows:

Decide who is going to be responsible for the implementation. The person must have the application knowledge, the commitment and the time to do the job. Top management has to provide full backing.

Next, a more detailed implementation plan has to be developed. This has to take into account your company circumstances and conditions.

What is a realistic objective? By when? What people and other resources are actually available? How much training do they need?

What is the makeup of your business and what settings and analysis codes need to be implemented in ALERT to represent this?

What new policies and procedures need to be put into place? How much documentation needs to be prepared?

Who will be responsible for the system testing and acceptance? How much testing needs to be done?

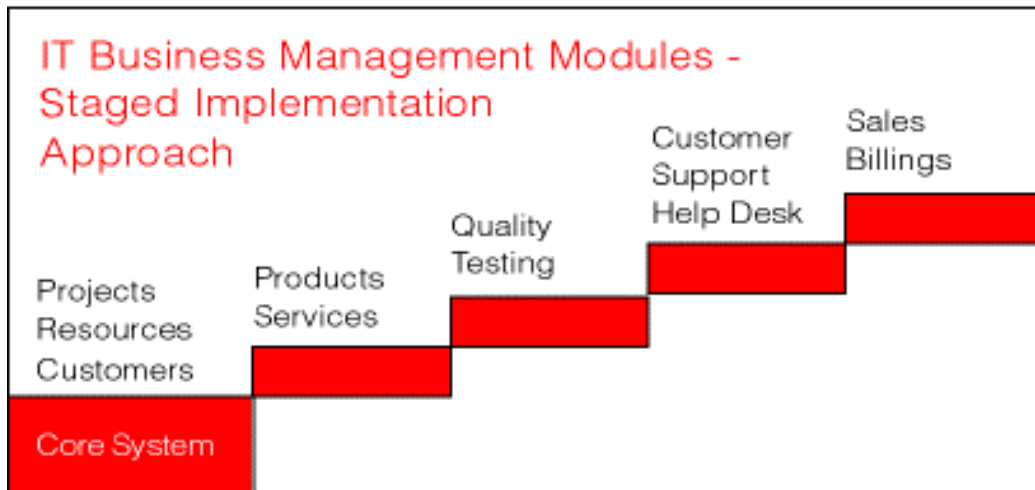
Are there any people attitudes which need attention?

All the above questions and more must be answered if the project is going to have its best chance of success.



## Implementation Plan....

10



The answers are likely to indicate a 'staged' approach to implementation to keep the task manageable. Another benefit of this approach is that each stage will build up on the success of the previous. Success is a powerful motivator!

Starting with just the basics in ALERT such as Management By Projects and Time recording will provide considerable and immediate returns to your business. From these basics but important foundations the company can gradually implement the other more specialised modules and facilities such as customer request management, software production management, billing management etc.

VBS has considerable experience in implementing these systems. We have the project managers equipped with professional tools. We have the application specialists who understand your business needs. We also have the technical people to develop the system to your requirements. Trainers too, are a major ingredient in a successful system implementation.

VBS have a comprehensive approach to training. These are sessions designed specifically for the audience, i.e. management, supervisors or users. VBS are able to conduct training sessions on site or in our training facilities.

Hands on training, system set up and program development and testing can all be done using VBS resources. There need not be delays in making a practical start on any aspect of implementation and progress can be made on a number of fronts at the same time.

VBS understands your needs and expectations and can deliver.



# Development and Support Policy

# 11

The ALERT system is continually being improved and extended to meet changing business requirements and to stay up to date with new technical developments.

To make on going development and support of ALERT a practical proposition, VBS have a policy of maintaining one 'core package' ALERT system. This 'core' ALERT system is the same in all VBS client sites.

Customised ALERT systems are designed around well defined standard interfaces between the customised portion and 'core' ALERT system.

This policy also means that both the 'core package' system and the customised components can be updated independent of each other.

The policy makes VBS staff more effective in servicing client needs. Our staff know the 'core package' version in detail. Customised work also follows a well defined pattern and they can therefore be more responsive to on going service needs for customised systems.

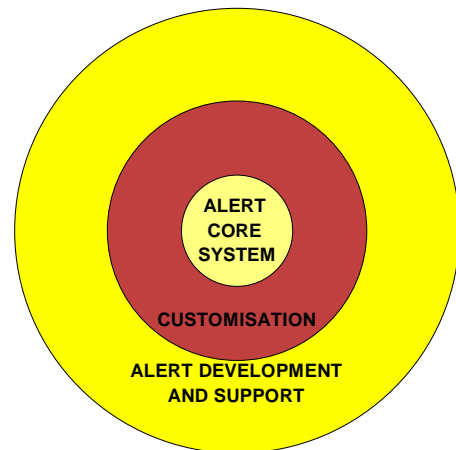
The VBS policy also saves the very high maintenance costs of systems which have been modified in an uncontrolled manner.

Without a 'core package' policy it would not even be possible to incorporate improvements to the system except at a prohibitive cost.

With the 'core package' policy, costs, can be spread over a large number of companies with like business system needs.

The on going development of ALERT is driven by feedback from users and the competitive pressures on VBS and its clients.

## ALERT DEVELOPMENT & SUPPORT



ALERT systems are required to be covered under Software Maintenance.

Software Maintenance entitles the customer to report and have resolved any software issues. It also entitles the customer to receive regular upgrades to ALERT.

Typically there is a major new 'release' of a portion of ALERT every 6 months.



# Development and Support Policy....

# 11

VBS provides a complete range of customer support services for ALERT.

These services range from software, implementation, infrastructure setup, including internet services, on going management, development and support for the system.

VBS uses the latest proven techniques to support customers with their own in house ALERT system.

A combination of support methods including a direct line of contact with skilled technical and application staff, various services in the customers Web service desk and e-mail provide an effective basis for support.

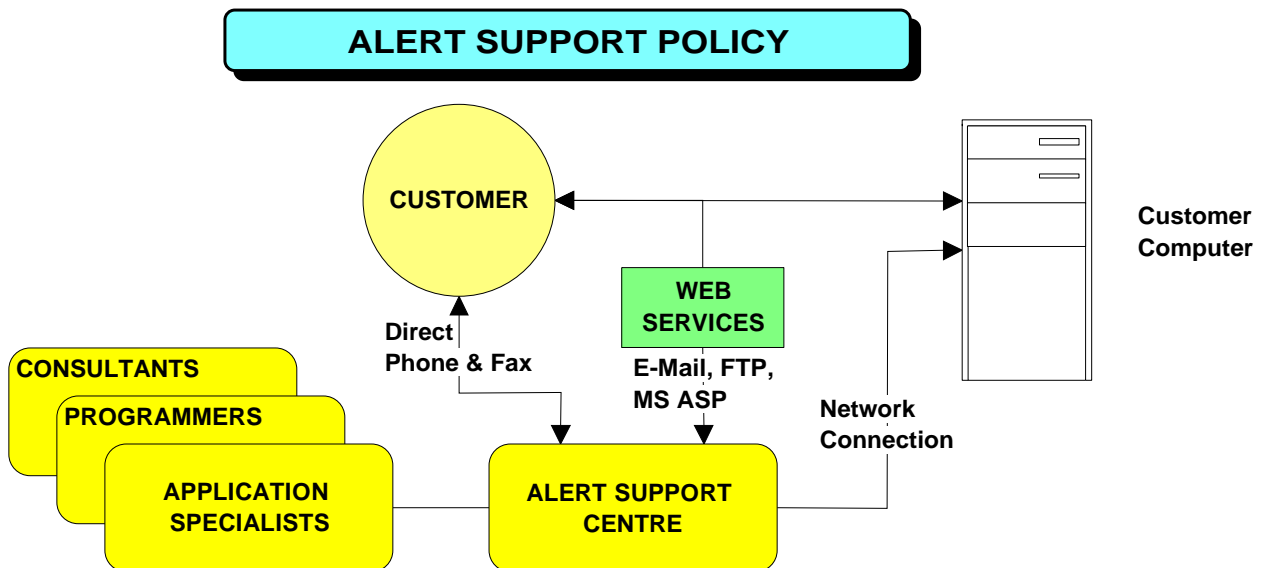
A network connection to the customers computer also enables VBS to reach the customers computer anywhere in the world within a few minutes. Web based updates also provide an

efficient means of distributing software and documentation.

The VBS central support team can be working with your people to resolve any problems without the need to travel. They have all their resources at hand at VBS. If required your system can be updated over the network.

The central team is supplemented by consultants, application specialists, technical specialists and trainers who visit clients for those tasks which can only effectively be done face to face.

VBS have developed a track record of providing high levels of support to clients using the ALERT system and welcome new customers verifying this with existing customers.



The direct line of contact with technical staff provides ready access to VBS support specialists for your business. You benefit from the use of these high level resources.

We are committed to a policy of continuous system and support improvement.





# Configuration Notes

# 12

There are no software imposed limits on the size of an ALERT system. It is designed for a multi-user situation with each user being able to operate independent of each other.

There are a number of alternate deployment options. The option chosen depends on the circumstances of each site. The deployment options include Web based access for staff and customers.

A central database is stored on a central networked computer with all users accessing this central database.

If Web Services including e-mail integration is implemented then a Mail Server and Web Server are also required.

VBS will provide a sizing worksheet that allows the user to determine the configuration required to run ALERT for your organisation.

This worksheet also includes the components required for the various deployment options.

The following table however specifies the minimum server configuration for ALERT as a guide only.

Server	Minimum Recommended
CPU	1GHz
Disk Space	1Gb
RAM	1,024Mb
Operating System	Windows 2003
IIS Brand	MS Internet Information Server or compatible
e-mail Brand	Microsoft Exchange or SMTP mail server.

The requirements at the user end are dependent on the deployment method that has been selected.

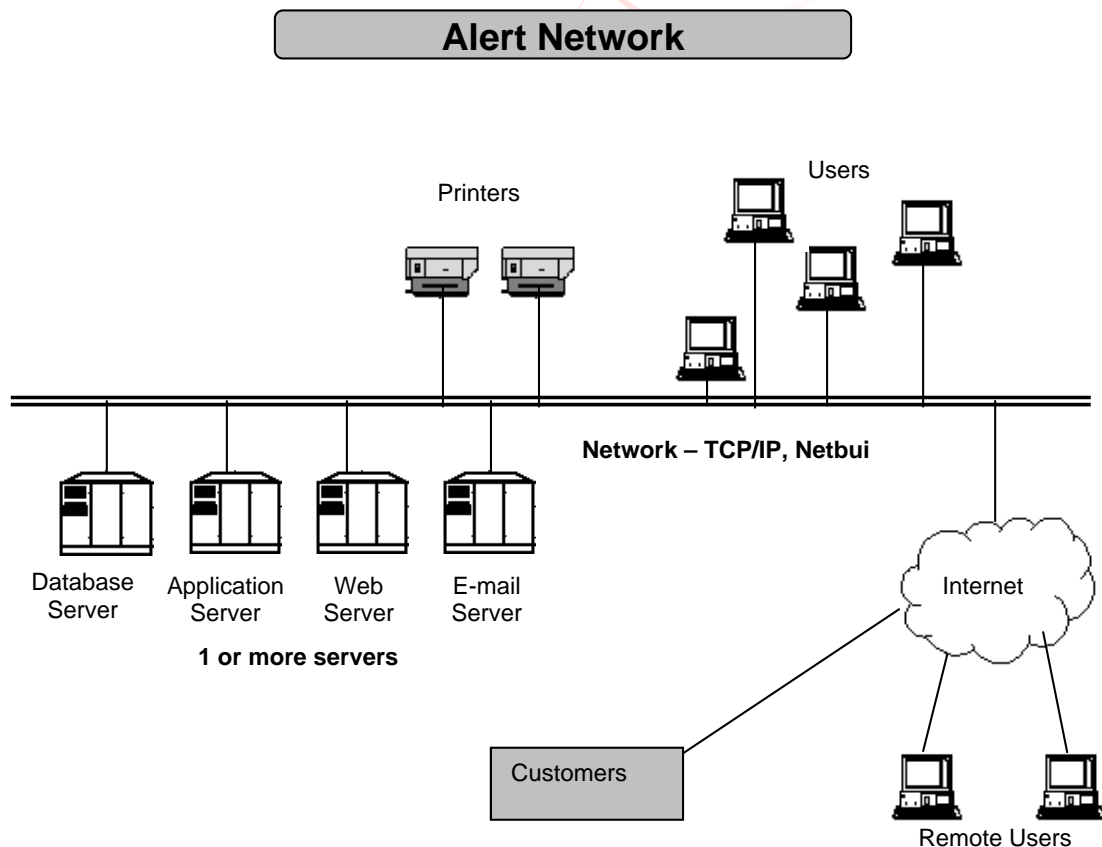
It is possible to run ALERT on a range of desktops from Windows through to Linux. VBS ask that you discuss your particular infrastructure with a Sales person to determine the deployment options that would suit your particular circumstances.

The load on the system at any one point in time is primarily a factor of the number of active concurrent users. It is important therefore to work on a realistic assessment of how the system is likely to be used, taking a worst case situation into account.

ALERT performs a wide range of functions. It should be remembered that functions such as period end processing will load the system and will affect system performance for staff updating timesheets.

The ALERT system stores your data until such time as you perform a 'clear-down' operation. Data is stored at both transaction and summary levels dependent on the type of data.





VBS can configure hardware to support user requirements in each of your company locations. Different locations can be set up to share the same ALERT database, or each location can have its own ALERT database with consolidation of data at the level required for company wide reporting.

Microsoft networking flexibility offers central control

while allowing users to run in a decentralised manner to suit their local needs.

VBS can fully advise on your configuration requirements in detail after a survey of your data volumes and your proposed method of operation of the system.



ALERT is written in the industry standard language of Visual Basic for Applications. Reasons for this include performance, compatibility and support reasons.

The database used for ALERT is Microsoft SQL Server which caters for small or large installations with a greater number of users.

A single SQL Server database is used and this resides on a central networked server.

The client system is deployed in compiled form for faster operation and security reasons.

Using Microsoft SQL Server provides a number of benefits including:

- ease of use and availability of skills in SQL Server
- Reliability and Scalability of SQL Server
- MS Access which is readily available in most organisations may be used as the report writer
- ODBC accessibility to SQL tables by other report writers

VBS can advise on resource usage based on your data volumes and work patterns. When considering the load on the database server, the other applications running on the server such as Mail and Back Office applications should also be considered.

The number of active concurrent users on the system will also determine the power rating of the server computer to provide satisfactory system performance.

A guide to the Server configuration may be found in the configuration section.

ALERT Web Services uses Microsoft Active Server pages and some Java Script. Alert web services is a pure web based application.

Alert Background Manager is required for Alert Web Services to function. Background Manager performs a number of tasks including:-

Web Request Entry  
Web request Maintenance  
Web Request Attachment  
Responsibility Manager  
Notification Manager  
Escalation Manager

A Background Monitor facility is built into Background Manager. This facility ensures that the required Background Manager services are running correctly. Should any failure occur then users are notified via e-mail.

The file attachment facilities in ALERT use a third party control from SoftArtisans.



## Contact Us

14

### ALERT

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