Pi Help File

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Part I

1 Important Set Up Notes

In order to use *Pi* fully please read the following topics, as applicable, to ensure that your set up is fully functional.

PerfectIT Windows XP Theme

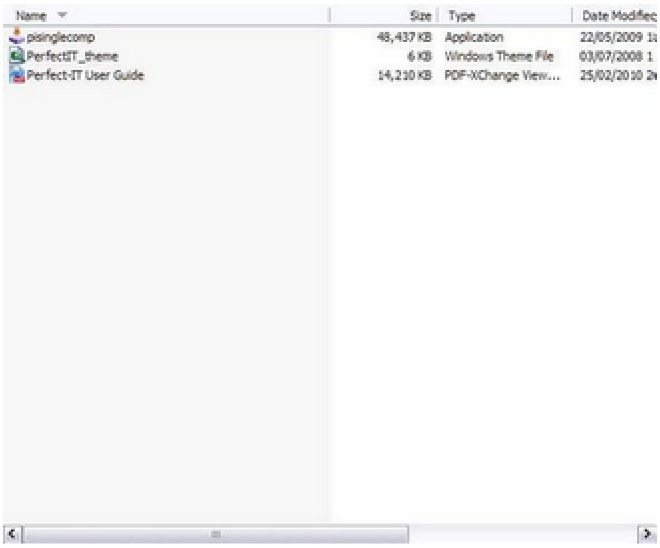
Windows Help file for Windows 7 users

Using Pi as Administrator in Windows 7 version

1.1 PerfectIT Windows XP Theme

In order to give a fresh visual resolution. ***Pi*** was developed using a Microsoft Windows XP customised Theme.
If your screens do not display correctly you will need to activate this theme. To do this you should double click the file included with your installation. This is found on the installation CD or in the directory in which you downloaded ***Pi***
The file is called : **PerfectIT_theme**

First locate the file.



Then double click on it. The following screen will appear.

Click the **Apply** button . A Windows message will appear briefly and the theme is now active. You should click the **OK** button to exit.

If you want to reset or change your desktop theme at any time you should right-click on your desktop screen and select **properties** to select a Theme or configure your theme using the display properties utility.Click the **Apply** button . A Windows message will appear briefly and the theme is now active. You should click the **OK** button to exit

1.2 Windows Help file for Windows 7 users

Pi *was* developed using context sensitive help, (saves you from having to search every time you want help - it means we have put the exact help you need, related to the activity you are currently performing, at your fingertips immediately, saving you time and ensuring you get the specific help you need when you need it.(Of course our help file does have fully comprehensive searching facilities should you ever need them).

Starting with the release of Windows Vista and continuing in Windows 7, Microsoft do not ship the Windows Help program (winhlp32.hlp) as a feature of Windows. Unfortunately Microsoft will not allow third-party vendors, like ourselves, to include this file with our applications and it is needed if you wish to use our essential context sensitive help file.

In order to use our winhlp32-bit help file (**highly recommended**), you must download and install the program (WinHlp32.exe) from the **Microsoft Download Centre**.

This is quite simple to do and in most cases you will be prompted to do this automatically by the Windows 7 operating system the first time you click the help key when using ***Pi*.**

To download the required file copy and paste the link below into your internet browser.

http://www.microsoft.com/downloads/details.aspx?FamilyID=258aa5ec-e3d9-4228-8844-008e02b32a2c&displaylang=en

and then follow the instructions given.

* note : There are two versions of the winhelp32.exe available for Windows 7 . Microsoft do supply instructions to determine the which version of windows 7 you are running ((**64 bit** or 32 bit(**X86**)), so please follow them to ensure you download the correct version of the winhelp32.exe file for your computer.

You only need to download and install the winhlp32.exe file ONCE.

1.3 Using Pi as Administrator in Windows 7 version

In order to use ***Pi*** fully in Microsoft Windows 7 you **must** run it as Administrator. There are several ways to do this and they are all fairly simple to set up.

OPTION ONE

Using a keyboard shortcut

This will allow ***Pi*** to run temporarily as an administrator once until you close it.

1. Press and hold **Ctrl+Shift** while opening the ***Perfectit*** program.

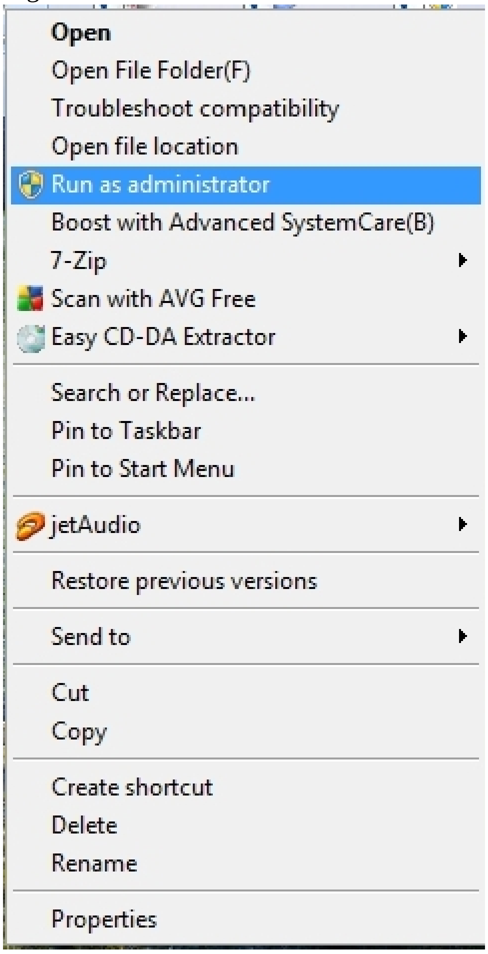
2. If prompted by User Account Control (UAC), then click on **Yes** to apply permission to allow the program to run with full permission as an Administrator.
NOTE: *If you are doing this is while logged in as **standard user** instead of an administrator, then you will need to provide the administrator's password before the program will run as administrator* .

OPTION TWO

Using the Program Context Menu

This will allow ***Pi*** to run temporarily as an administrator **once** until you close it.

1. Right click on the ***Pi*** shortcut and click on **Run as administrator**. (See screenshot below)



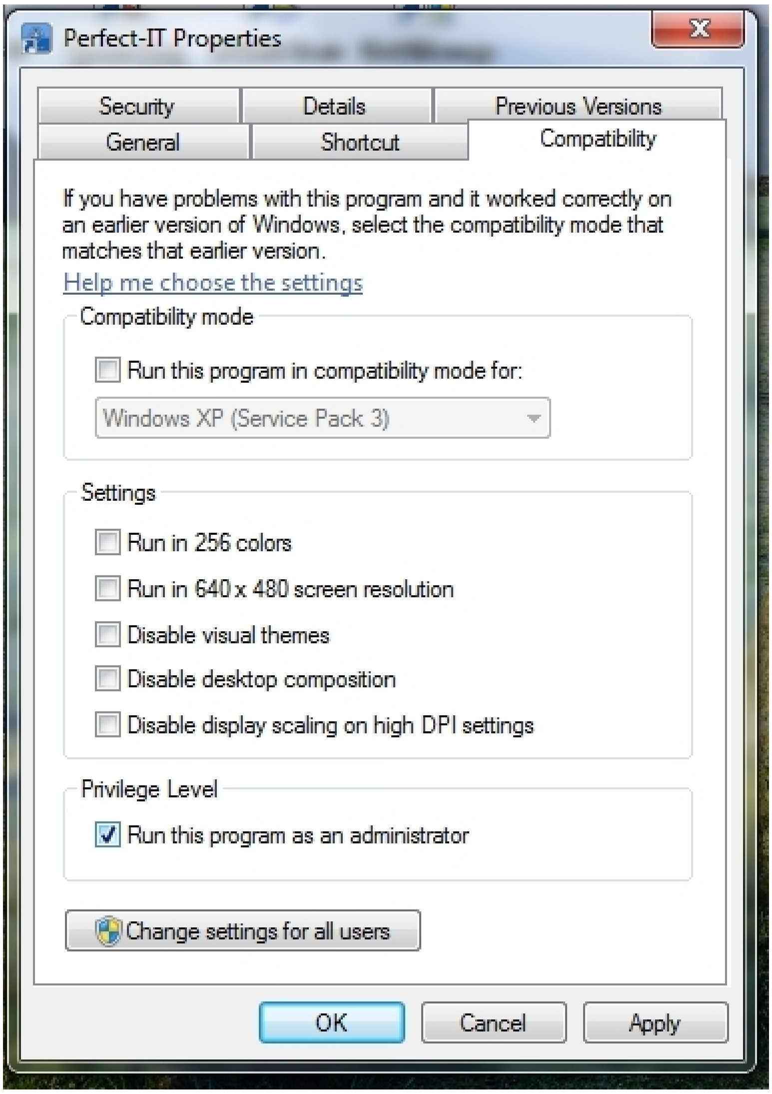
2. If prompted by User Account Control (UAC), then click on **Yes** to apply permission to allow the program to run with full permission as an administrator.
NOTE: *If you are doing this is while logged in as **standard user** instead of an administrator, then you will need to provide the administrator's password before the program will run as administrator*
.

OPTION THREE (recommended)

Using Compatibility Mode

This will allow ***Pi*** to run as an administrator **every time** you open it.

1. Right click on the ***Pi*** shortcut, then click on **Properties**, and on the **Compatibility** tab. (See screenshots below)
NOTE: *If you are doing this while logged on as a* ***standard user*** *instead of an administrator, then you will need to also click on the* ***Change settings for all users*** *button and type in the administrator's password.*



2. To Always Run this Program as an Administrator -

A) Check the **Run this program as an administrator** box, and click on **OK**. (See screenshots above)

3. **To Not Always Run this Program as an Administrator** -

A) Uncheck the **Run this program as an administrator** box, and click on **OK**. (See screenshots below step 1)

4. Open the program.

5. If prompted by User Account Control (UAC), then click on **Yes** to apply permission to allow the program to run with full permission as an administrator.
NOTE: *If you are doing this is while logged in as* ***standard user*** *instead of an administrator, then you will need to provide the administrator's password before the program will run as administrator* .

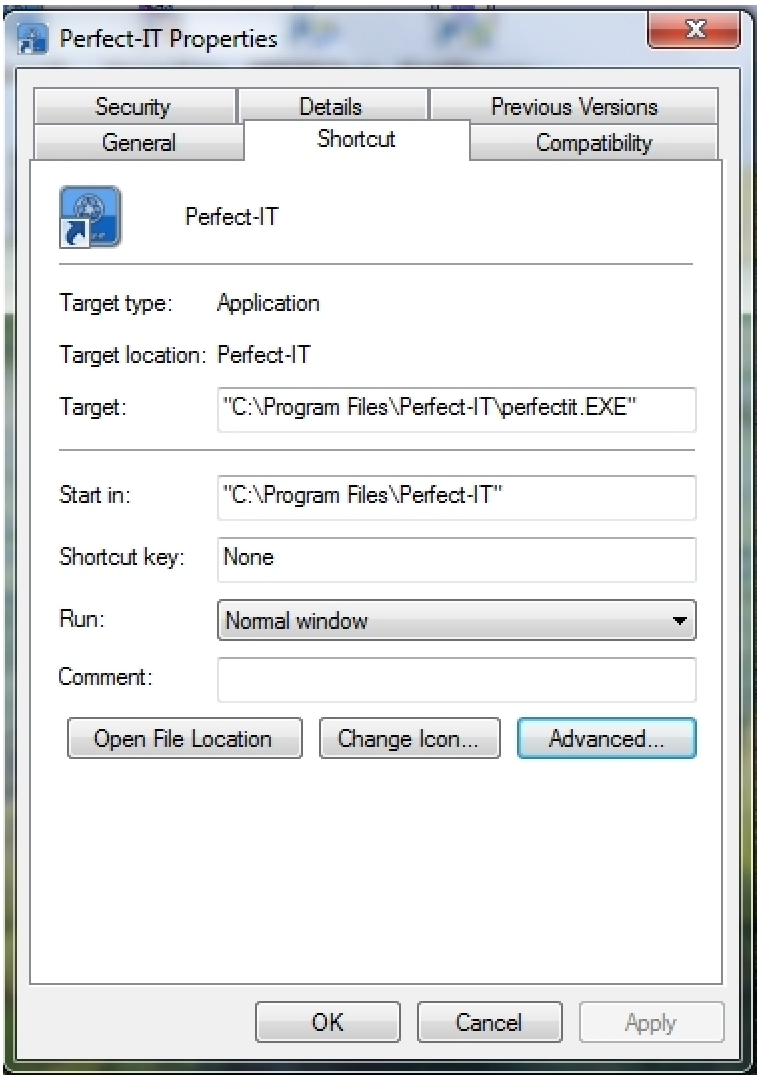
OPTION Four

Using Advanced Properties

This will allow ***Pi*** to run as an administrator **every time** you open it.

1. Right click on the ***Pi*** shortcut then click on **Properties**.

2. Click on the ***Pi*** shortcut, Click on the **Advanced** button. (See screenshots below)



3. To Always Run this Program as an Administrator -

A) Check the **Run as administrator** box, and click on **OK**. (See screenshot below)
NOTE: *The option to select this from the **General** tab (step 2) is not available in a **standard user** account.*

4. To Not Always Run this Program as an Administrator -

A) Uncheck the **Run as administrator** box, and click on **OK**. (See screenshot above)
NOTE: *The option to select this from the **General** tab (step 2) is not available in a **standard user** account.*

5. Click on **OK**. (See screenshots below step 2)

6. Open the program.

7. If prompted by User Account Control (UAC), then click on **Yes** to apply permission to allow the program to run with full permission as an Administrator.
NOTE: *If you are doing this is while logged in as **standard user** instead of an administrator, then you will need to provide the administrator's password before the program will run as administrator* .

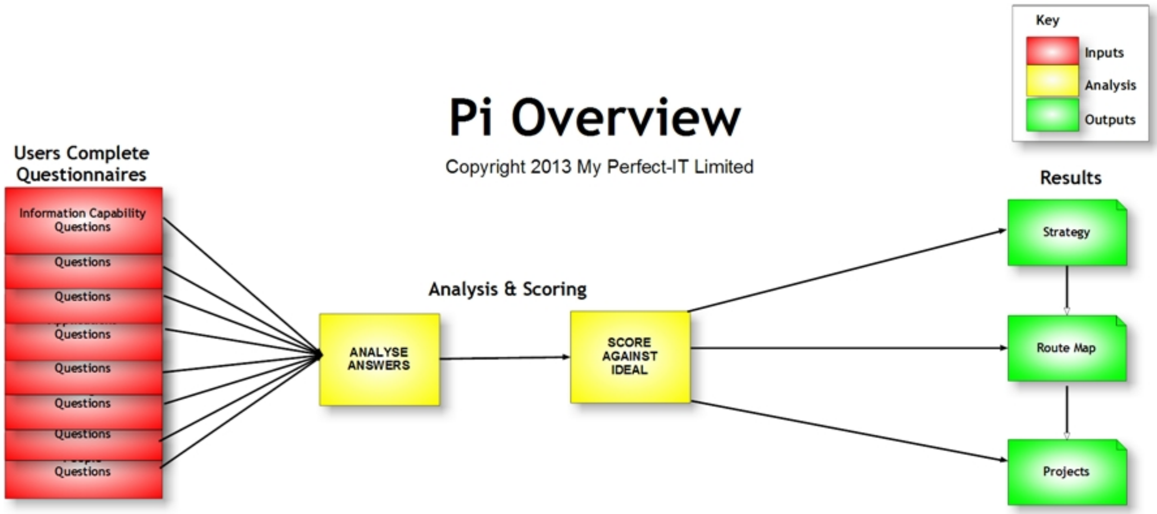
1.4 Screen Resolution

In order to ensure that the screen resolution is the same as that used when programming the application and consequently easy to read, a check is made when you start the application. If it is not the same, the screen resolution will be dynamically set to 1024 x 768. Your resolution will be reset to your preferred resolution on exit from the application.

Part II

2 Contents

2.1 Overview



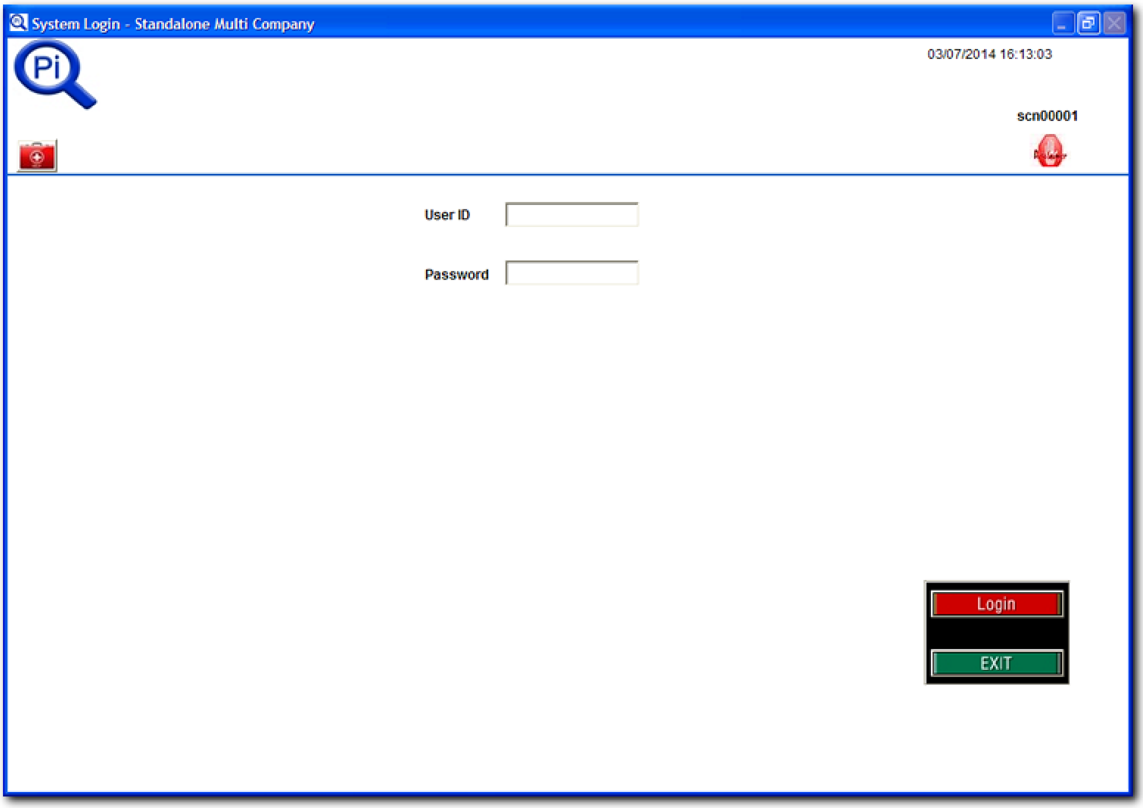
Pi is an application that asks you simple questions about the various areas of your organisation and based on your answers details how you can improve the effectiveness of your information and overall business performance.

<u>Continuous improvement in just 7 steps:</u>

1. Answer ALL the questionnaires
2. Run the Analysis
3. Run the Reports
4. Implement the Recommendations
5 .Review the Results
6. Update the Questionnaires
7. Repeat steps 2 - 6

<u>Important Note</u>
In order to obtain accurate advice, it is essential that you complete <u>ALL</u> of the questionnaires within the system before running any of the output options.

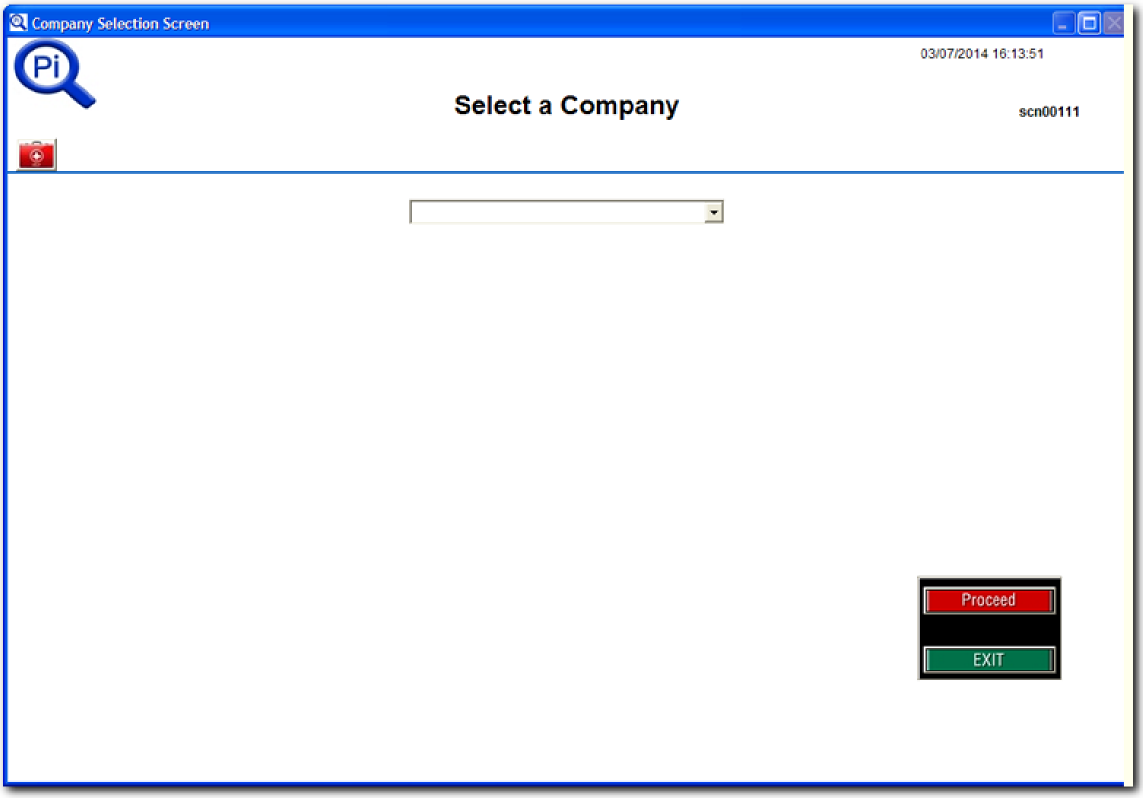
2.2 Logging In



Here you must enter your USER ID and Password. Input is case sensitive.
Once the correct information has been entered you will be taken either to the Control Centre if using the Single Company version of the application or to the Select Company screen if using the Multi Company version of the application.

Note: The options available and the detail of output available are dependent on the version of the software licensed/purchased.

2.3 Select Company (Subscriber)



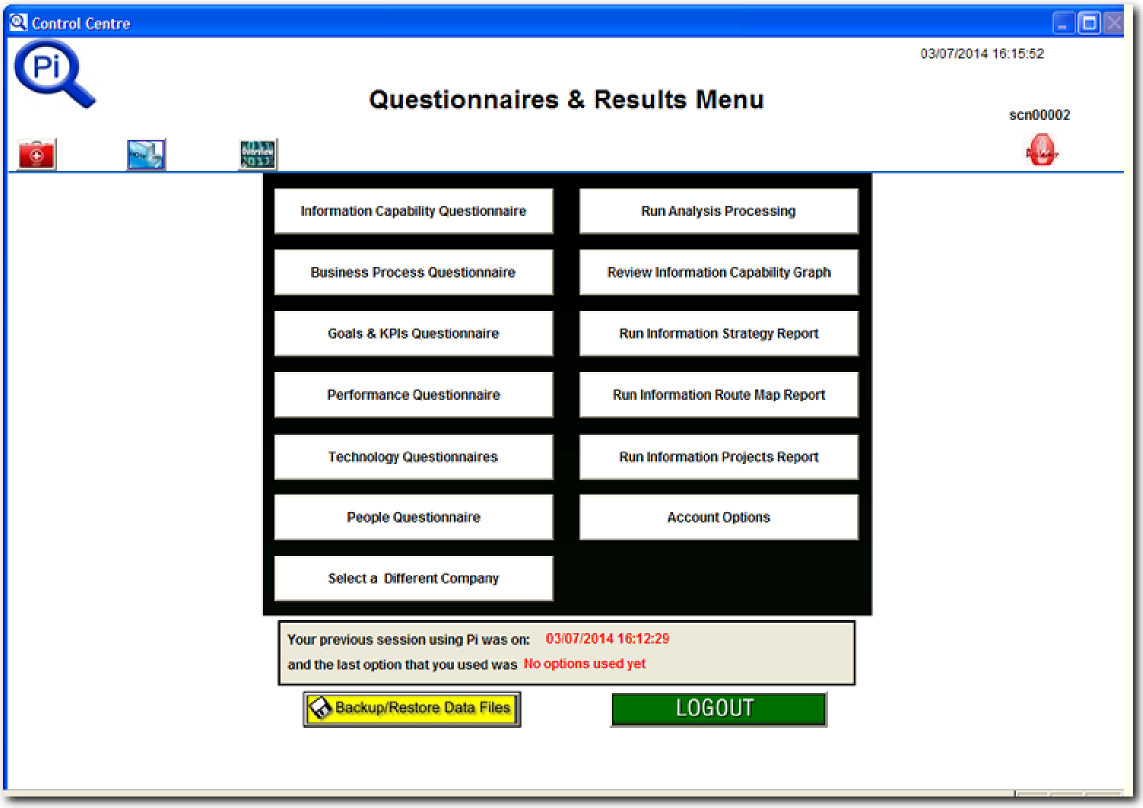
This option is ONLY available in the Multi-Company version. After logging in you are taken to this screen where you must select the company you wish to work on from a drop down selection list.

Pressing **EXIT** will quit the application if selected after initial log.

When a company has been selected you are taken to the Control Centre

You can also re-select a New Company from the Control Centre.

2.4 Control Centre



This is the Questions & Results Menu and the Control Centre of the application.

Towards the bottom of the screen is a information box which will inform you of the last time that you used Pi and also the last option that you used.

On this screen you have access to the following options:

Information Capability Questionnaire
This gives access to the Information Capability Questions section of the application

Business Process Questionnaire
This gives access to the Business Processes section of the application.

Goals & KPIs Questionnaire
This gives access to the Goals and Objectives section of the application

Performance Questionnaire
This gives access to the Performance section of the application

Technology Questionnaires
This gives access to the Technology section of the application

People Questionnaire
This gives access to the People section of the application

Select a Different Company
This allows Selection of a new Company (*Multi-Company version only*)

Run Analysis Processing
This runs the overall analysis of all the input made by you

Review Information Capability Graph
This gives access to the Information Capability Results / Graph section of the application

Run Information Strategy Report
This will run the Information Strategy Report

Run Information Route Map Report
This will run the Information Route Map Report

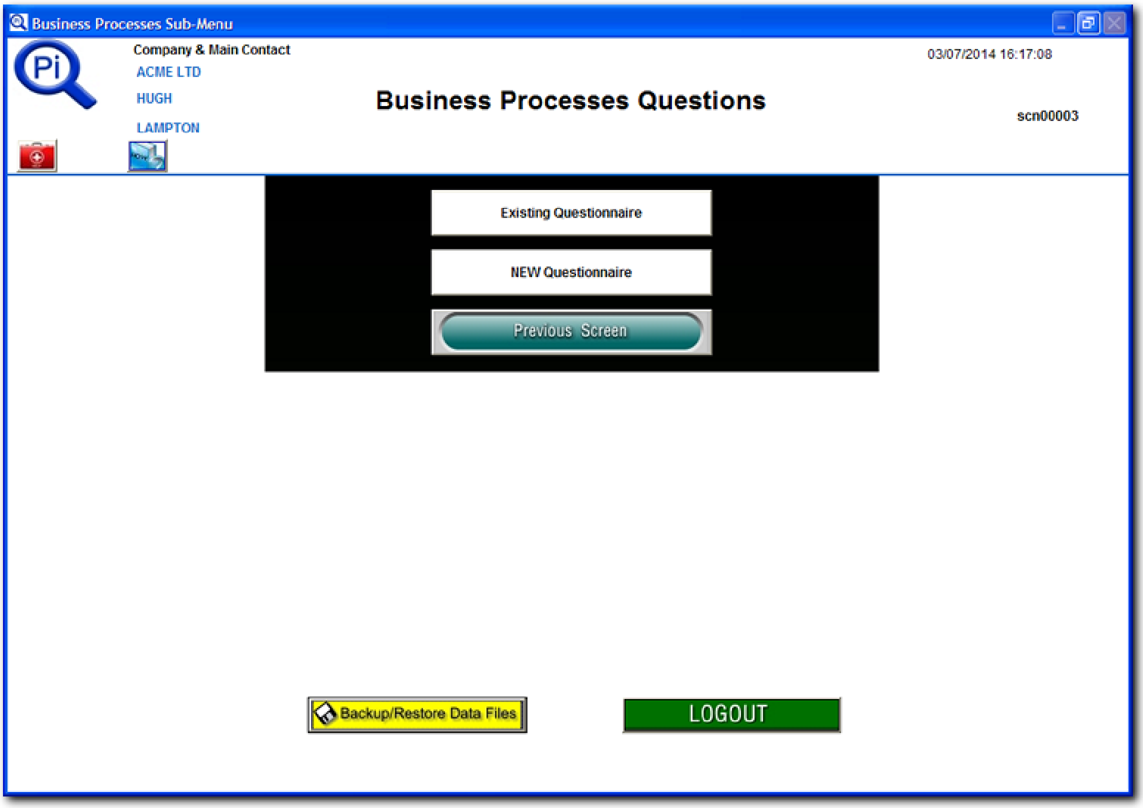
Run Information Projects Report
This will run the Information Projects Report

Account Options Menu
This gives access to Account Options Menu

Backup / Restore Data Files
This gives access to Data File Security options

Pressing the **LOGOUT** button quits from the application

2.5 Business Process Sub-Menu



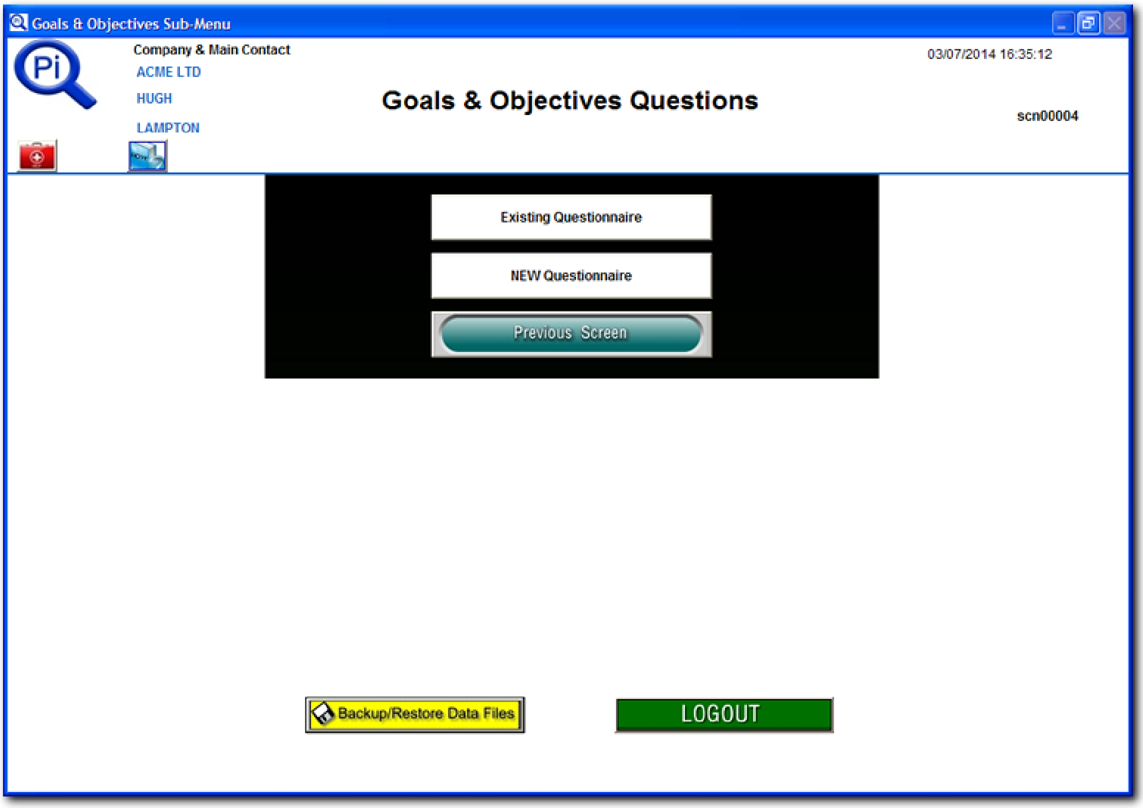
Here you may select to access an **EXISTING** Business Process Questionnaire, Create a **NEW** Business Process Questionnaire or Return to the Control Centre, by clicking the Appropriate button.

Existing Questionnaire New Questionnaire Previous Screen

Backup / Restore Data Files
This gives access to Data File Security options

Pressing the **LOGOUT** button quits from the application

2.6 Goals & Objectives Sub-Menu



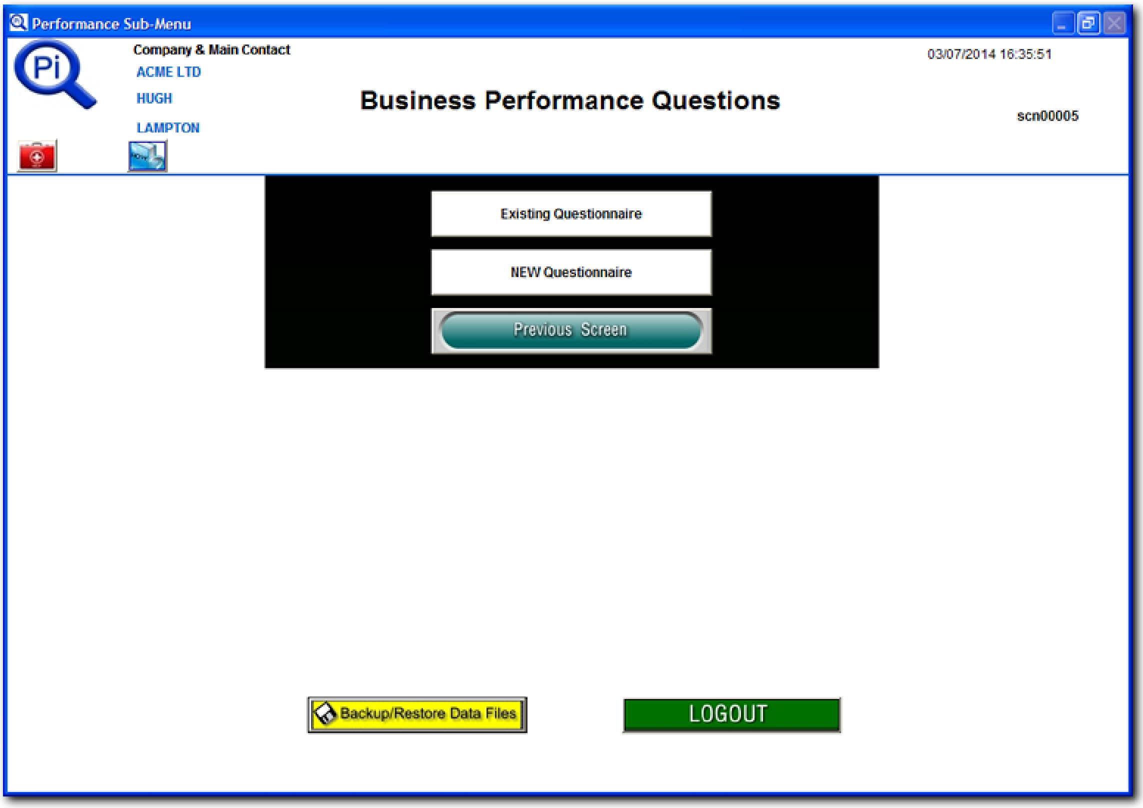
Here you may select to access an **EXISTING** Goals & Objectives Questionnaire, Create a **NEW** Goals & Objectives Questionnaire or Return to the Control Centre, by clicking the appropriate button.

Existing Questionnaire   New Questionnaire   Previous Screen

Backup / Restore Data Files
This gives access to Data File Security options

Pressing the **LOGOUT** button quits from the application

2.7 Performance Sub-Menu



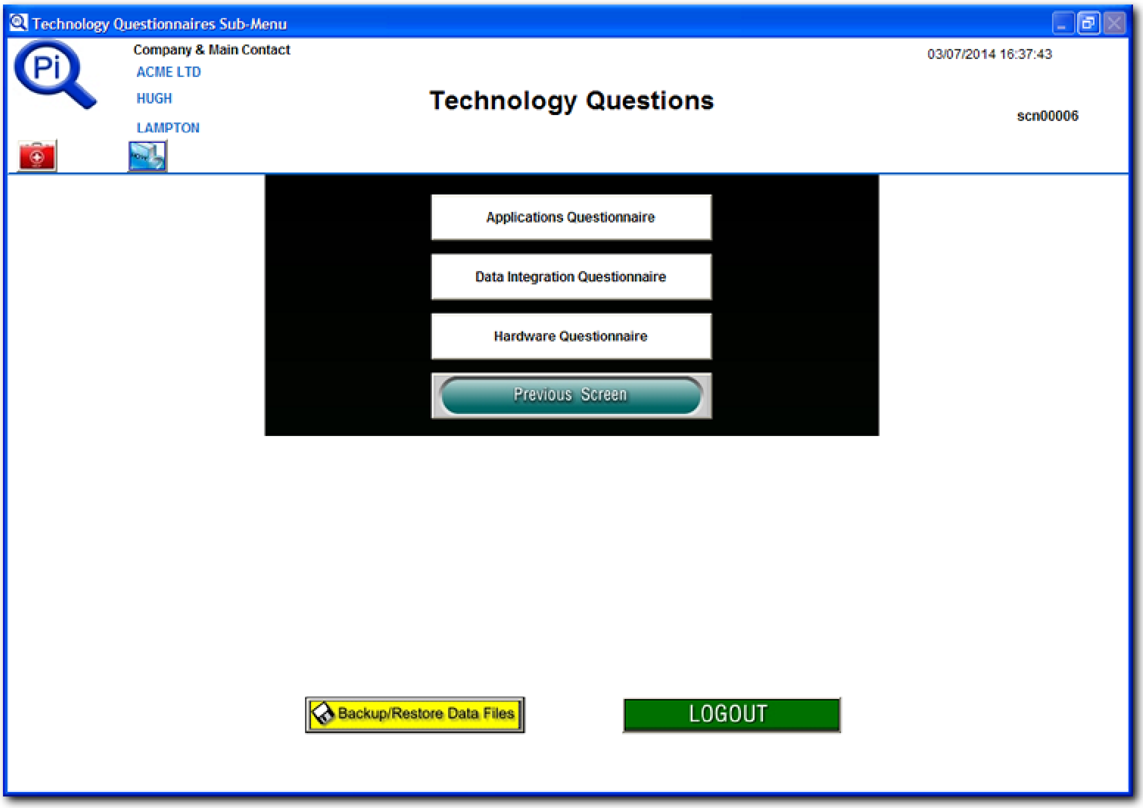
Here you may select to access an **EXISTING** Performance Questionnaire, Create a **NEW** Performance Questionnaire or Return to the Control Centre, by clicking the appropriate button.

Existing Questionnaire   New Questionnaire   Previous Screen

Backup / Restore Data Files
This gives access to Data File Security options

Pressing the **LOGOUT** button quits from the application

2.8 Technology Questions



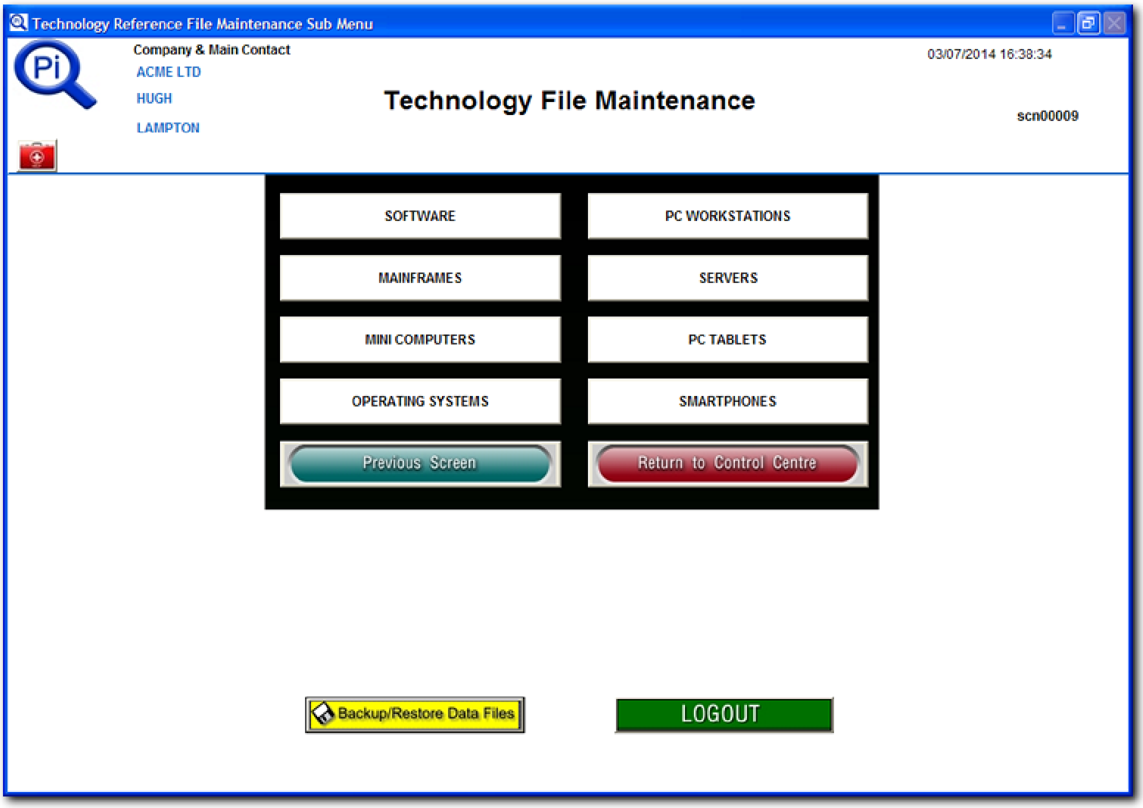
Here you may select to update your questionnaire for Technology Applications, Data Integration or Hardware or Return to the Control Centre, by clicking the appropriate button.

Applications   Data Integration   Hardware   Previous Screen

Backup / Restore Data Files
This gives access to Data File Security options

Pressing the **LOGOUT** button quits from the application

2.9 Technology Sub Menu



This menu allows you to add new components to the following reference files:

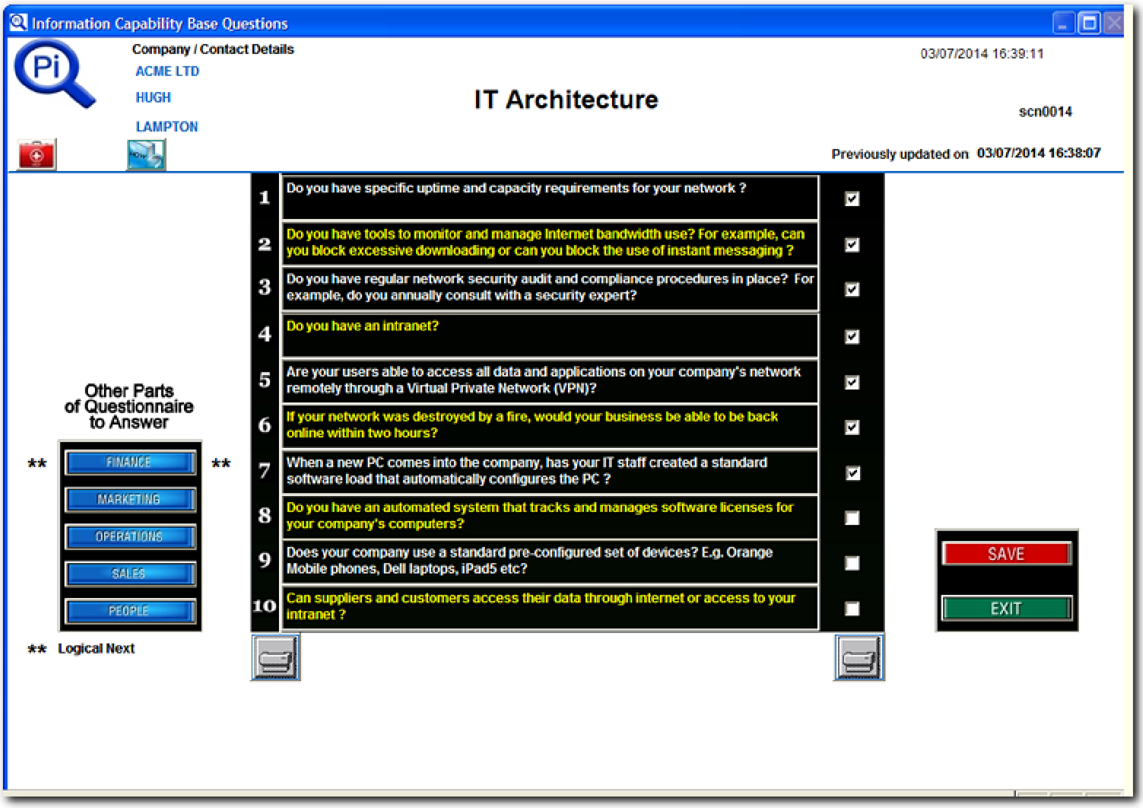
SOFTWARE
MAINFRAMES
MINI COMPUTERS
OPERATING SYSTEMS
PC WORKSTATIONS
SERVERS
PC TABLET
SMARTPHONE

Clicking the Previous Screen button returns you to the File Maintenance Sub Menu.

Backup / Restore Data Files
This gives access to Data File Security options

Pressing the **LOGOUT** button quits from the application

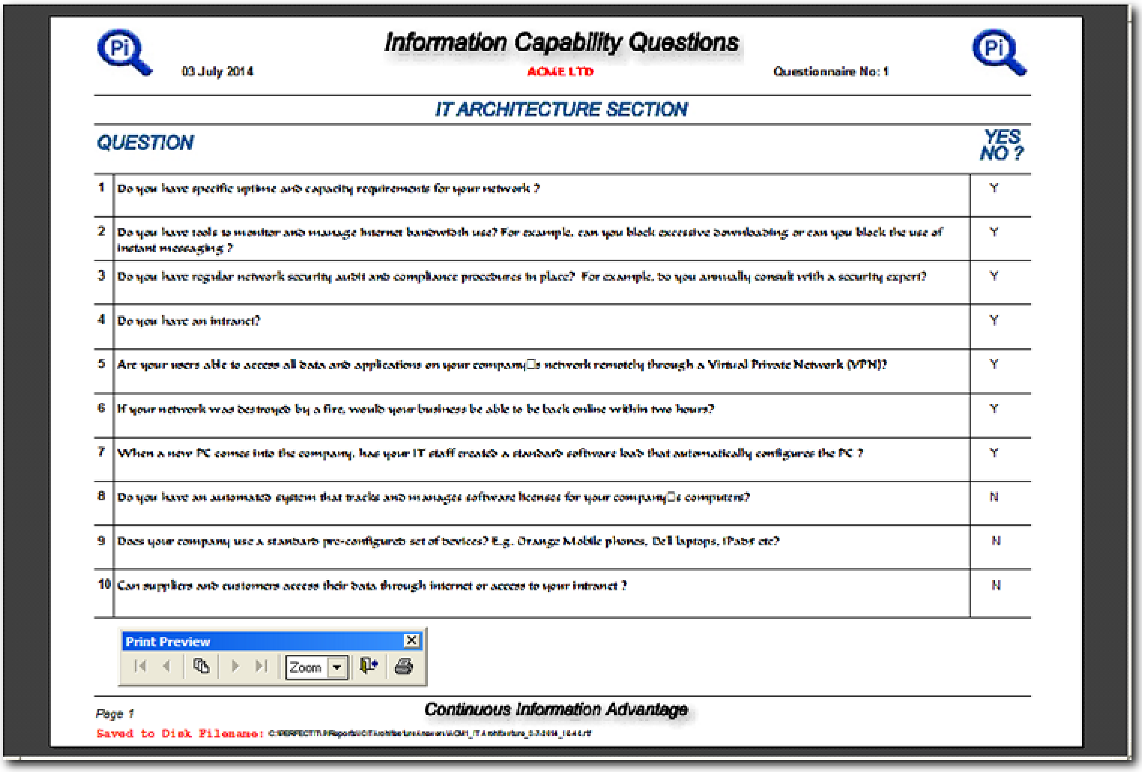
2.10 IT Architecture



Here you are asked to answer yes/no to 10 questions which relate to your company IT Architecture. This is done by placing a tick (clicking in input box) to indicate a positive answer or by leaving the input box blank to indicate a negative answer.

At the bottom left hand side of the screen are another 5 buttons that allow navigation to other parts of the Information Capability questionnaire. (The next logical section is indicated by a double star **)

Below the questions are two Print Buttons which allow you to print a copy of the questions and your answers to the current section or to print the complete Information Capability Questionnaire and answers.Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk



Information Capability Questions

03 July 2014 | ACME LTD | Questionnaire No: 1

IT ARCHITECTURE SECTION

	QUESTION	YES NO ?
1	Do you have specific uptime and capacity requirements for your network ?	Y
2	Do you have tools to monitor and manage Internet bandwidth use? For example, can you block excessive downloading or can you block the use of instant messaging ?	Y
3	Do you have regular network security audit and compliance procedures in place? For example, do you annually consult with a security expert?	Y
4	Do you have an intranet?	Y
5	Are your users able to access all data and applications on your company□s network remotely through a Virtual Private Network (VPN)?	Y
6	If your network was destroyed by a fire, would your business be able to be back online within two hours?	Y
7	When a new PC comes into the company, has your IT staff created a standard software load that automatically configures the PC ?	Y
8	Do you have an automated system that tracks and manages software licenses for your company□s computers?	N
9	Does your company use a standard pre-configured set of devices? E.g. Orange Mobile phones, Dell laptops, iPads etc?	N
10	Can suppliers and customers access their data through internet or access to your intranet ?	N

Print Preview

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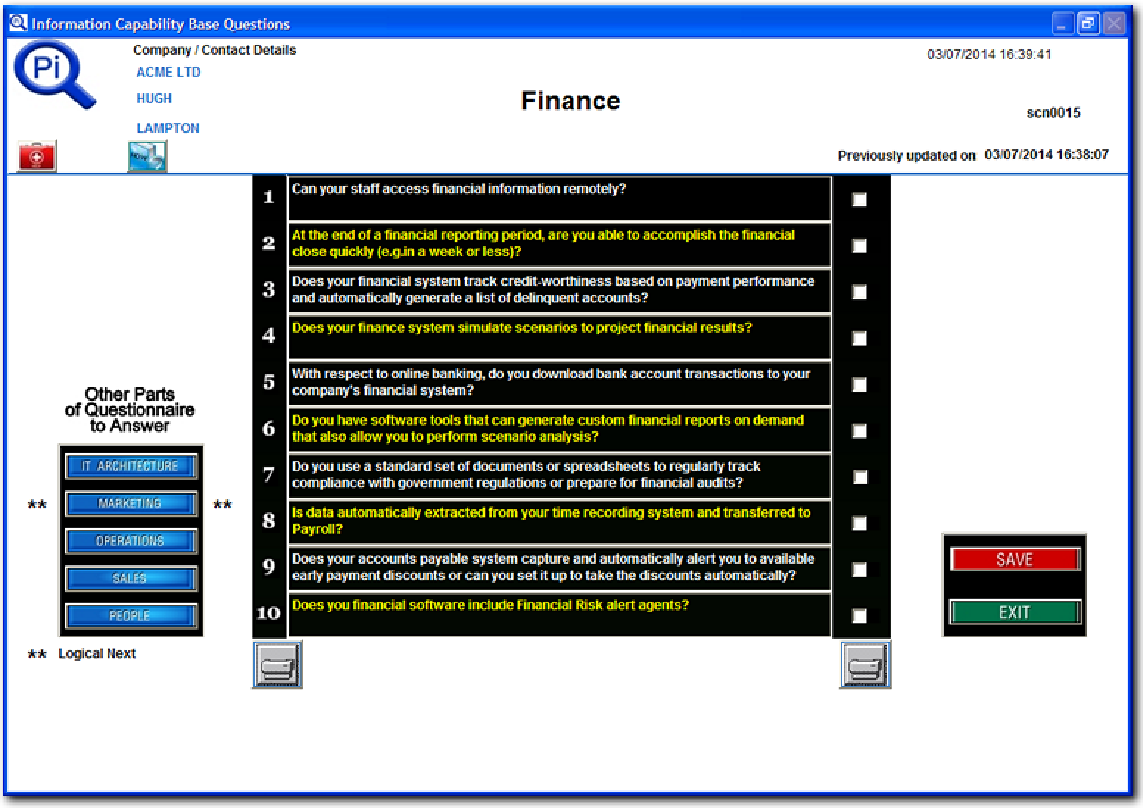
Continuous Information Advantage

Saved to Disk Filename:

At the bottom right hand side of the screen two other buttons are available which allow you to **save** the current screen inputs or to **exit** back the Control Centre of the application.

Finance Questions Marketing Questions Operations Questions Sales Questions People Questions

2.11 Finance



Here you are asked to answer yes/no to 10 questions which relate to your company Finance activity. . This is done by placing a tick (clicking in input box) to indicate a positive answer or by leaving the input box blank to indicate a negative answer.

At the bottom left hand side of the screen are another 5 buttons that allow navigation to other parts of the Information Capability questionnaire. (The next logical section is indicated by a double star **)

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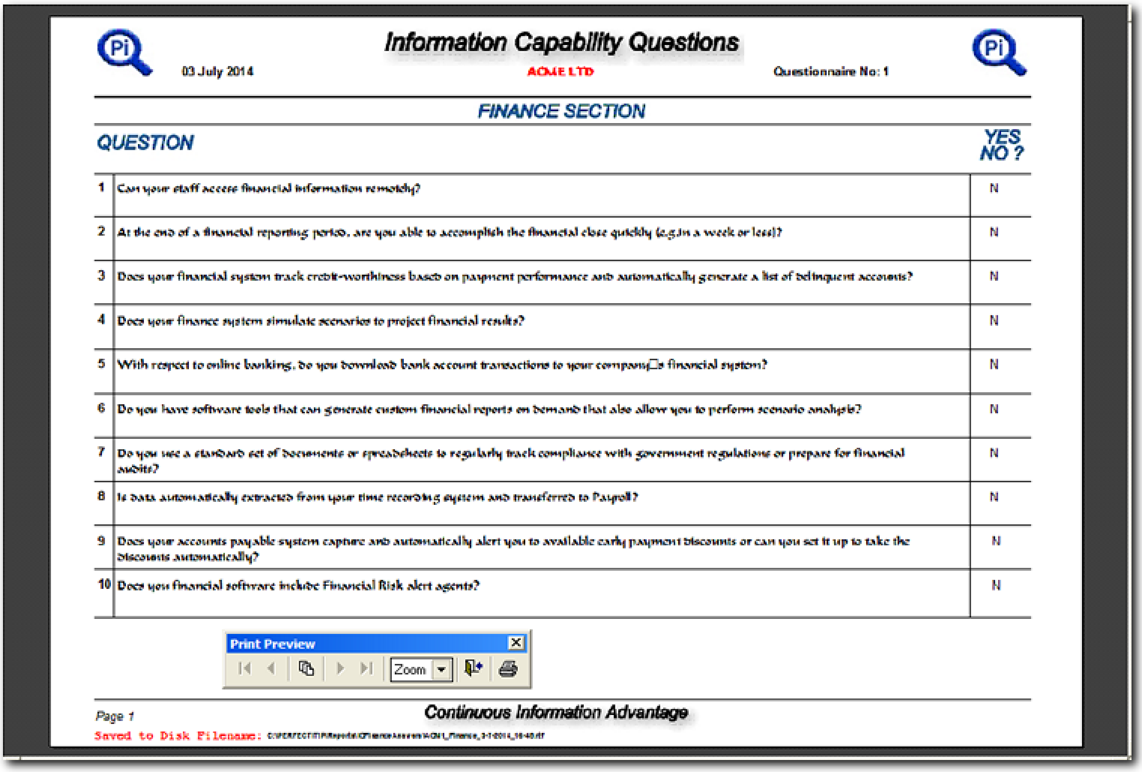

Information Capability Questions

03 July 2014 ACME LTD Questionnaire No: 1

FINANCE SECTION

	QUESTION	YES NO ?
1	Can your staff access financial information remotely?	N
2	At the end of a financial reporting period, are you able to accomplish the financial close quickly (e.g.in a week or less)?	N
3	Does your financial system track credit-worthiness based on payment performance and automatically generate a list of delinquent accounts?	N
4	Does your finance system simulate scenarios to project financial results?	N
5	With respect to online banking, do you download bank account transactions to your company□s financial system?	N
6	Do you have software tools that can generate custom financial reports on demand that also allow you to perform scenario analysis?	N
7	Do you use a standard set of documents or spreadsheets to regularly track compliance with government regulations or prepare for financial audits?	N
8	Is data automatically extracted from your time recording system and transferred to Payroll?	N
9	Does your accounts payable system capture and automatically alert you to available early payment discounts or can you set it up to take the discounts automatically?	N
10	Does you financial software include Financial Risk alert agents?	N

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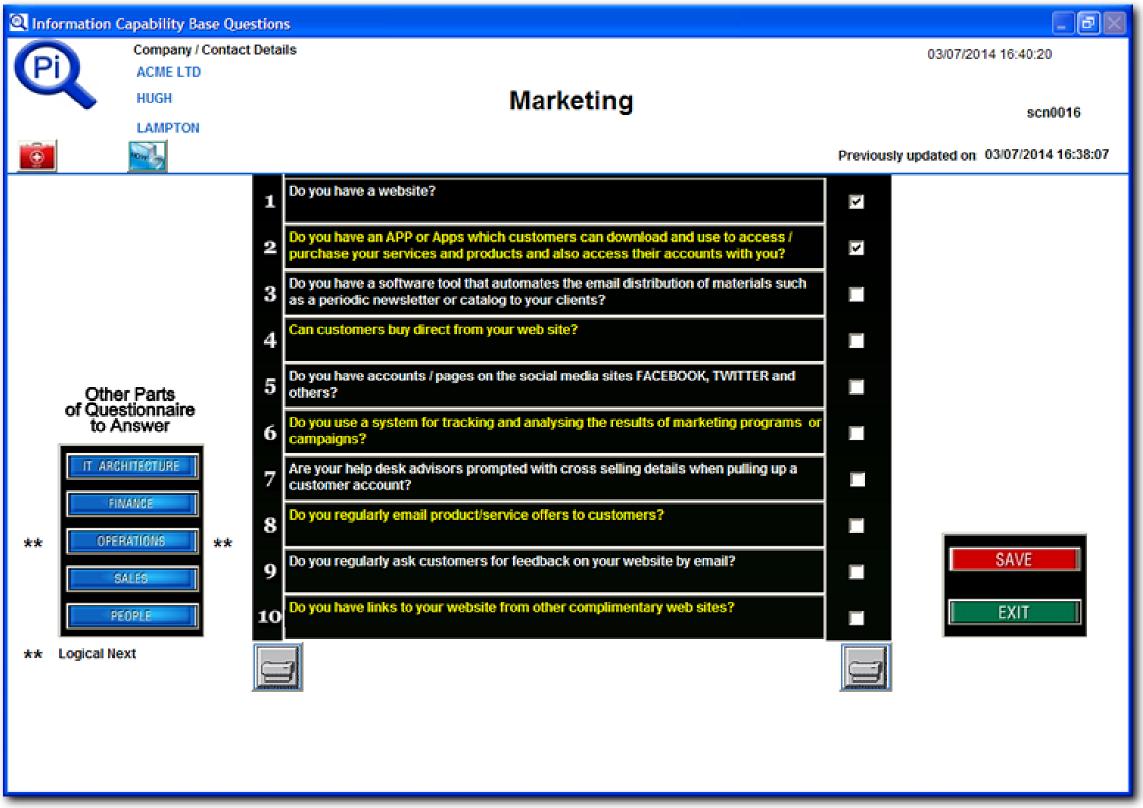
IT Architecture Questions Marketing Questions Operations Questions Sales Questions People Questions

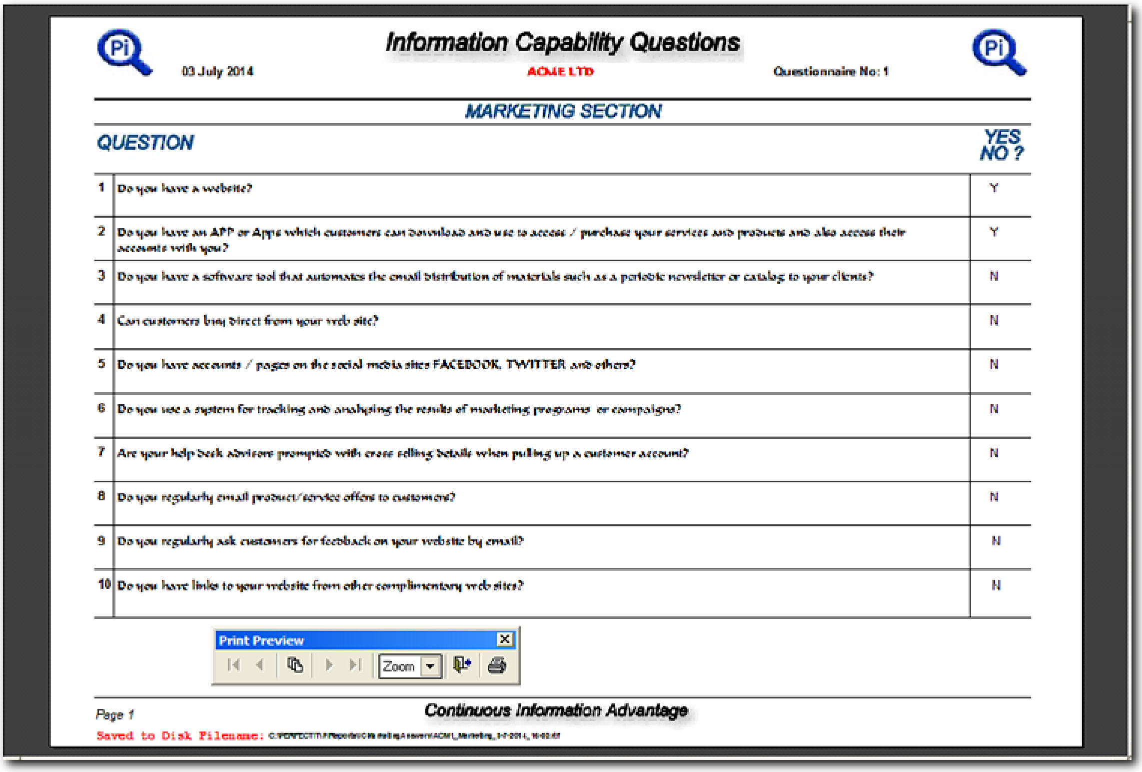
2.12 Marketing



Here you are asked to answer yes/no to 10 questions which relate to your company Marketing activity. This is done by placing a tick (click in input box) to indicate a positive answer or by leaving the input box blank to indicate a negative answer.

At the bottom left hand side of the screen are another 5 buttons that allow navigation to other parts of the Information Capability questionnaire. (The next logical section is indicated by a double star **)

Below the questions are two Print Buttons which allow you to print a copy of the questions and your answers to the current section or to print the complete Information Capability Questionnaire and answers.Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk



Information Capability Questions

03 July 2014 ACME LTD Questionnaire No: 1

MARKETING SECTION

	QUESTION	YES NO ?
1	Do you have a website?	Y
2	Do you have an APP or Apps which customers can download and use to access / purchase your services and products and also access their accounts with you?	Y
3	Do you have a software tool that automates the email distribution of materials such as a periodic newsletter or catalog to your clients?	N
4	Can customers buy direct from your web site?	N
5	Do you have accounts / pages on the social media sites FACEBOOK, TWITTER and others?	N
6	Do you use a system for tracking and analysing the results of marketing programs or campaigns?	N
7	Are your help desk advisors prompted with cross selling details when pulling up a customer account?	N
8	Do you regularly email product/service offers to customers?	N
9	Do you regularly ask customers for feedback on your website by email?	N
10	Do you have links to your website from other complimentary web sites?	N

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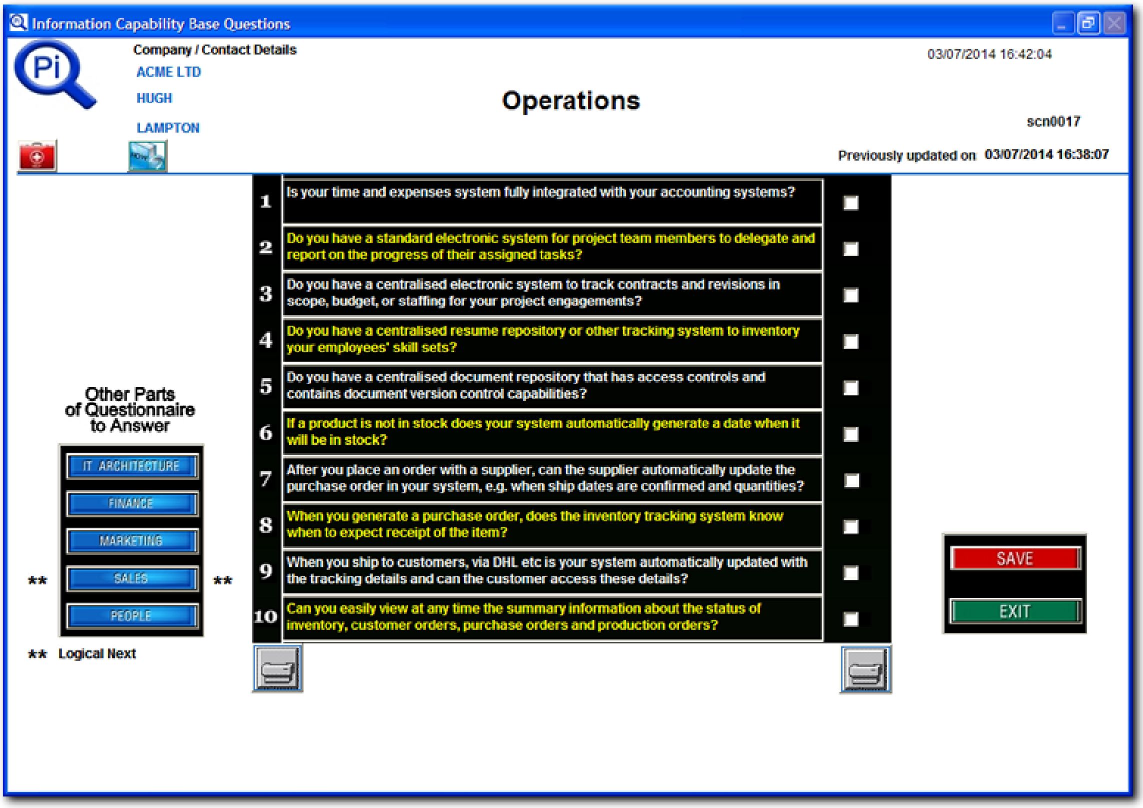
Finance Questions IT Architecture Questions Operations Questions Sales Questions People Questions

2.13 Operations



Here you are asked to answer yes/no to 10 questions which relate to your company Operations. . This is done by placing a tick (clicking in input box) to indicate a positive answer or by leaving the input box blank to indicate a negative answer.

At the bottom left hand side of the screen are another 5 buttons that allow navigation to other parts of the Information Capability questionnaire. (The next logical section is indicated by a double star **)

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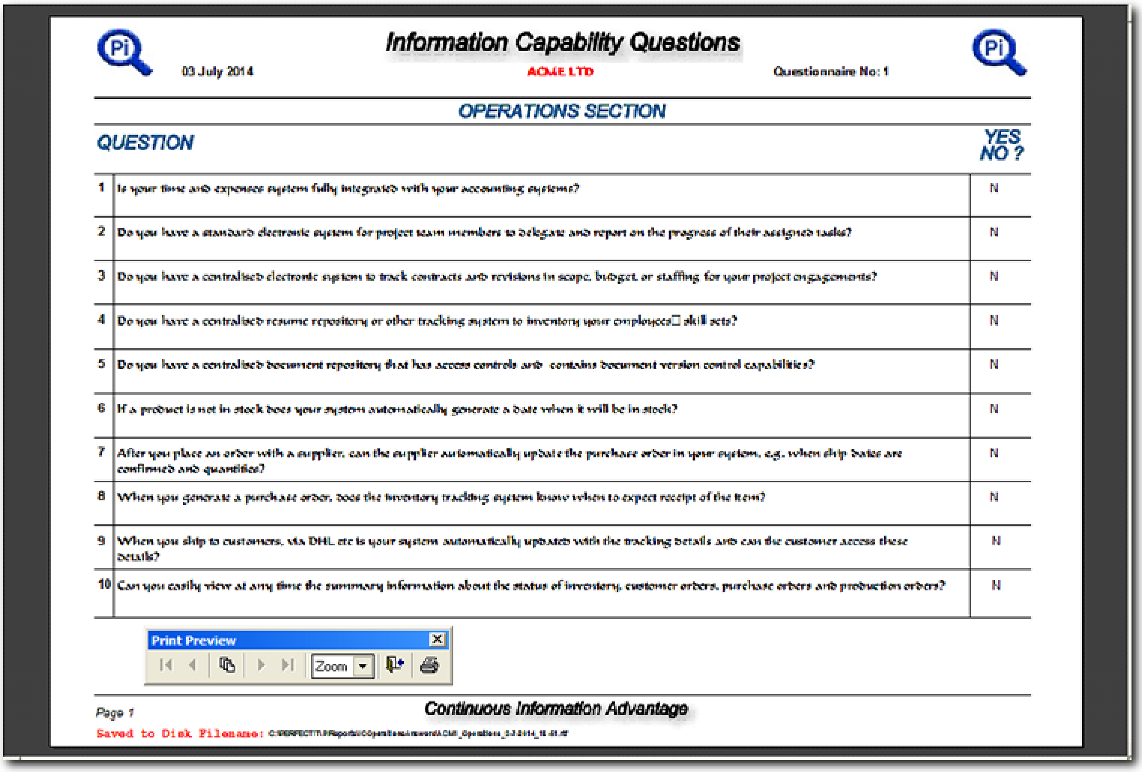

Information Capability Questions

03 July 2014 ACME LTD Questionnaire No: 1

OPERATIONS SECTION

	QUESTION	YES NO ?
1	Is your time and expenses system fully integrated with your accounting systems?	N
2	Do you have a standard electronic system for project team members to delegate and report on the progress of their assigned tasks?	N
3	Do you have a centralised electronic system to track contracts and revisions in scope, budget, or staffing for your project engagements?	N
4	Do you have a centralised resume repository or other tracking system to inventory your employees□ skill sets?	N
5	Do you have a centralised document repository that has access controls and contains document version control capabilities?	N
6	If a product is not in stock does your system automatically generate a date when it will be in stock?	N
7	After you place an order with a supplier, can the supplier automatically update the purchase order in your system, e.g. when ship dates are confirmed and quantities?	N
8	When you generate a purchase order, does the inventory tracking system know when to expect receipt of the item?	N
9	When you ship to customers, via DHL etc is your system automatically updated with the tracking details and can the customer access these details?	N
10	Can you easily view at any time the summary information about the status of inventory, customer orders, purchase orders and production orders?	N

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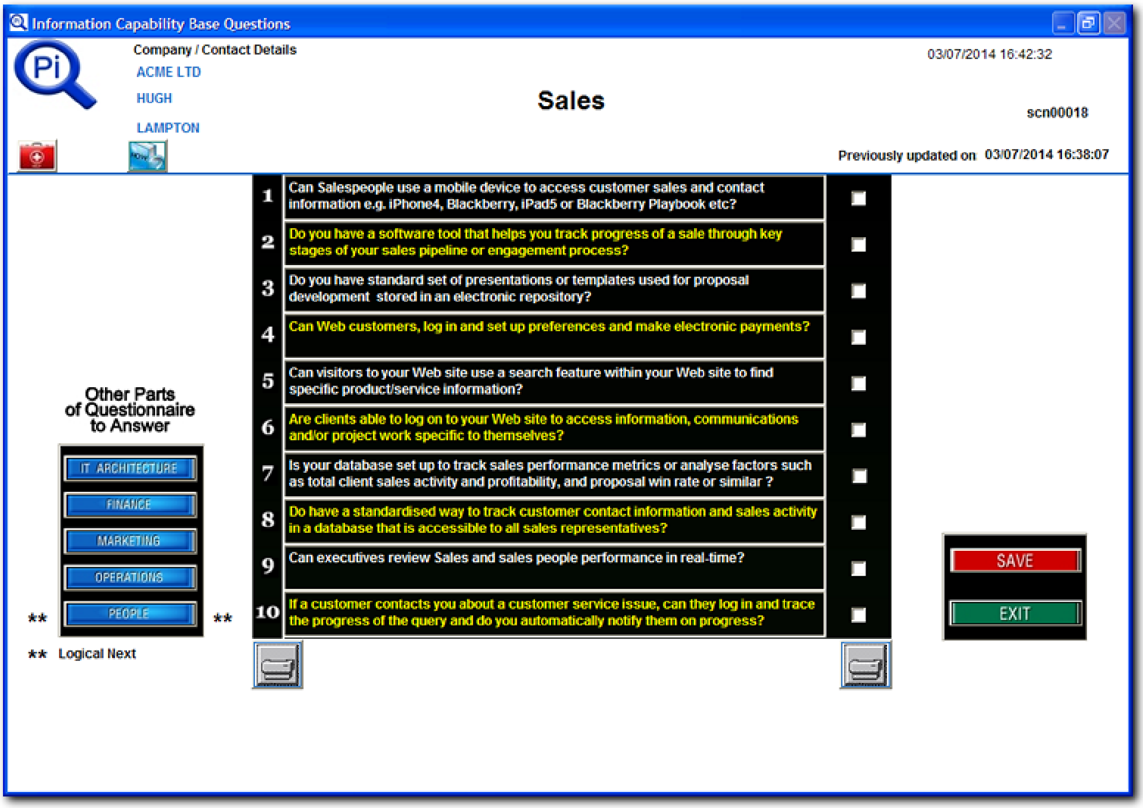
At the bottom right hand side of the screen two other buttons are available which allow you to **save** the current screen inputs or to **exit** back the Control Centre of the application.

Finance Questions Marketing Questions IT Architecture Questions Sales Questions People Questions

2.14 Sales



Here you are asked to answer yes/no to 10 questions which relate to your company Sales activity. This is done by placing a tick (clicking in input box) to indicate a positive answer or by leaving the input box blank to indicate a negative answer.

At the bottom left hand side of the screen are another 5 buttons that allow navigation to other parts of the Information Capability questionnaire. (The next logical section is indicated by a double star **)

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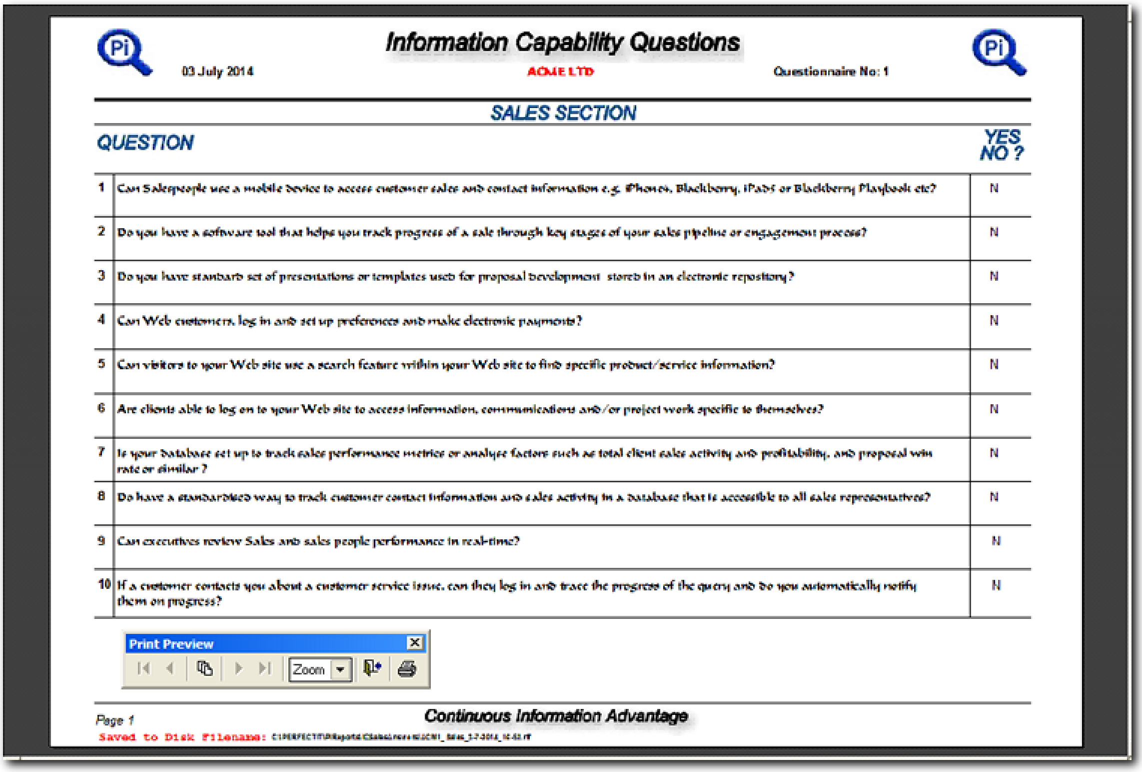

Information Capability Questions

03 July 2014 ACME LTD Questionnaire No: 1

SALES SECTION

	QUESTION	YES NO ?
1	Can Salespeople use a mobile device to access customer sales and contact information e.g. iPhones, Blackberry, iPads or Blackberry Playbook etc?	N
2	Do you have a software tool that helps you track progress of a sale through key stages of your sales pipeline or engagement process?	N
3	Do you have standard set of presentations or templates used for proposal development stored in an electronic repository?	N
4	Can Web customers, log in and set up preferences and make electronic payments?	N
5	Can visitors to your Web site use a search feature within your Web site to find specific product/service information?	N
6	Are clients able to log on to your Web site to access information, communications and/or project work specific to themselves?	N
7	Is your database set up to track sales performance metrics or analyse factors such as total client sales activity and profitability, and proposal win rate or similar ?	N
8	Do have a standardised way to track customer contact information and sales activity in a database that is accessible to all sales representatives?	N
9	Can executives review Sales and sales people performance in real-time?	N
10	If a customer contacts you about a customer service issue, can they log in and trace the progress of the query and do you automatically notify them on progress?	N

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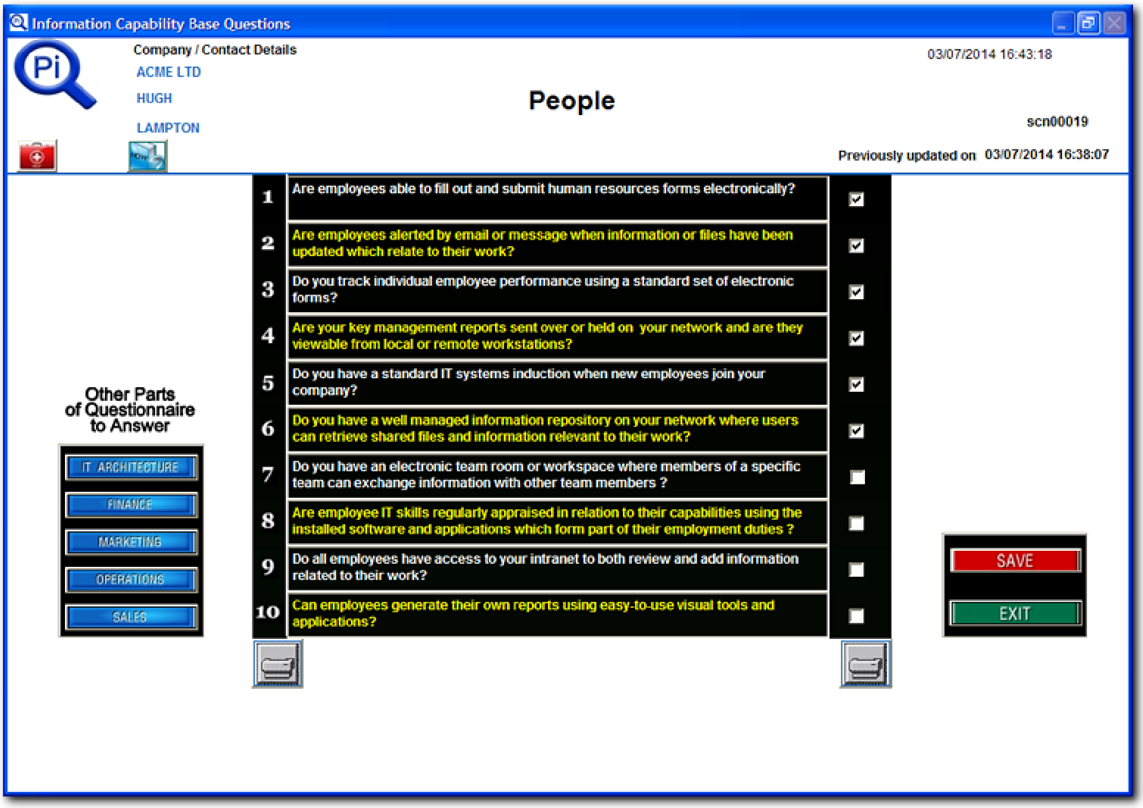
At the bottom right hand side of the screen two other buttons are available which allow you to **save** the current screen inputs or to **exit** back the Control Centre of the application.

Finance Questions Marketing Questions Operations Questions IT Architecture Questions People Questions

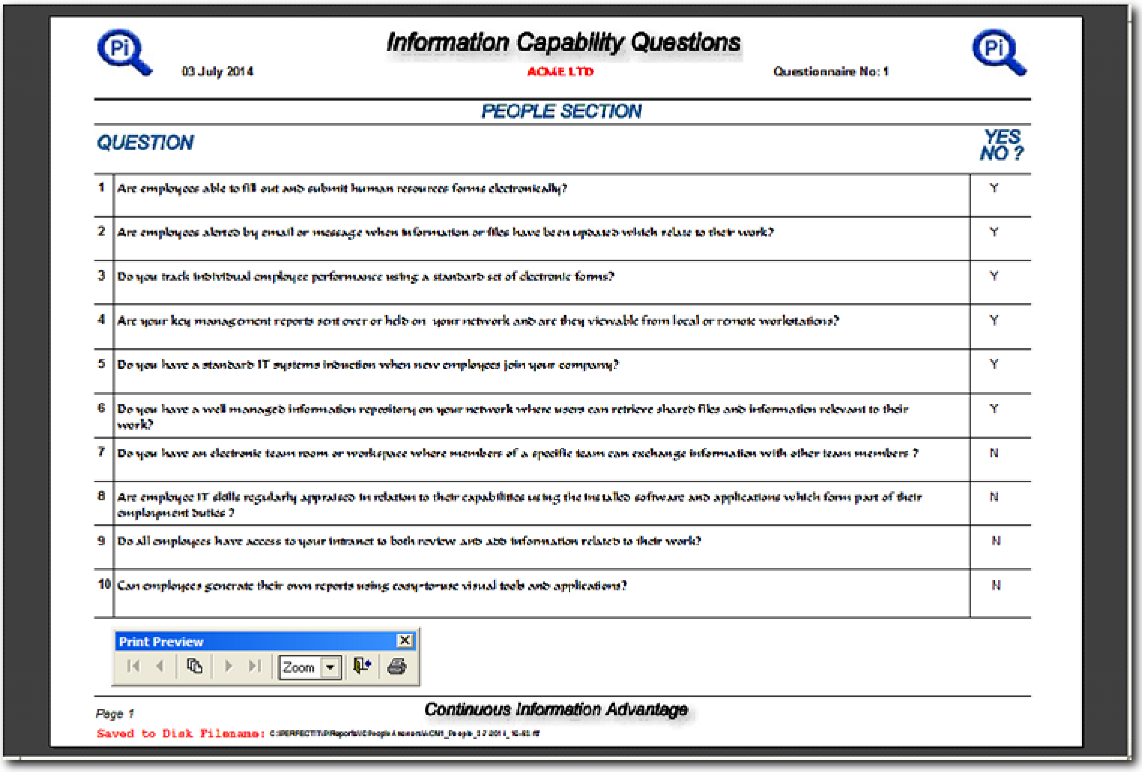
2.15 People



Here you are asked to answer yes/no to 10 questions which relate to your company Personnel. . This is done by placing a tick (clicking in input box) to indicate a positive answer or by leaving the input box blank to indicate a negative answer.

At the bottom left hand side of the screen are another 5 buttons that allow navigation to other parts of the Information Capability questionnaire. (The next logical section is indicated by a double star **)

Below the questions are two Print Buttons which allow you to print a copy of the questions and your answers to the current section or to print the complete Information Capability Questionnaire and answers.Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk



Information Capability Questions

03 July 2014 — ACME LTD — Questionnaire No: 1

PEOPLE SECTION

	QUESTION	YES NO ?
1	Are employees able to fill out and submit human resources forms electronically?	Y
2	Are employees alerted by email or message when information or files have been updated which relate to their work?	Y
3	Do you track individual employee performance using a standard set of electronic forms?	Y
4	Are your key management reports sent over or held on your network and are they viewable from local or remote workstations?	Y
5	Do you have a standard IT systems induction when new employees join your company?	Y
6	Do you have a well managed information repository on your network where users can retrieve shared files and information relevant to their work?	Y
7	Do you have an electronic team room or workspace where members of a specific team can exchange information with other team members ?	N
8	Are employee IT skills regularly appraised in relation to their capabilities using the installed software and applications which form part of their employment duties ?	N
9	Do all employees have access to your intranet to both review and add information related to their work?	N
10	Can employees generate their own reports using easy-to-use visual tools and applications?	N

Page 1 — *Continuous Information Advantage*

Saved to Disk Filename:

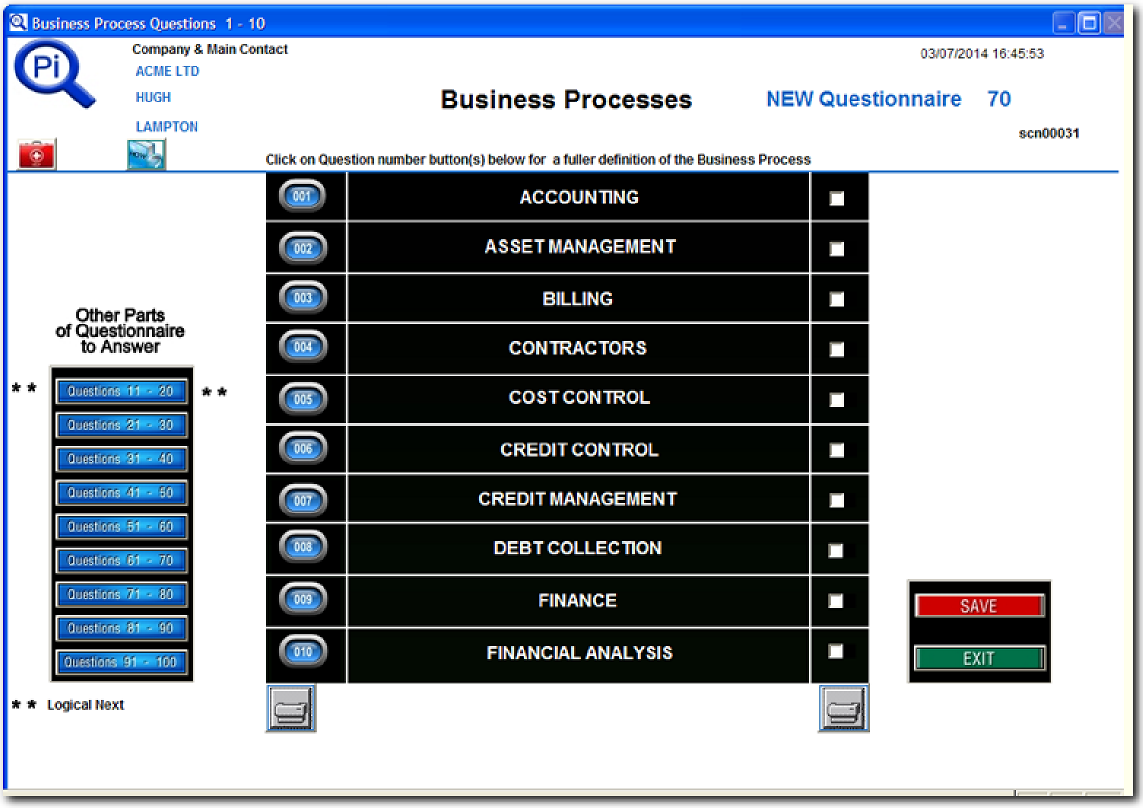
At the bottom right hand side of the screen two other buttons are available which allow you to **save** the current screen inputs or to **exit** back the Control Centre of the application.

Finance Questions Marketing Questions Operations Questions Sales Questions IT Architecture Questions

2.16 Business Processes - New

This section is one of the most crucial parts of Pi. In this section you must answer questions that directly relate to the Business Processes of the your company (employer). There are 100 questions to be answered available from the 10 screens of this section of Pi.

When the option is selected from The Business Processes Sub-Menu the following screen is displayed:

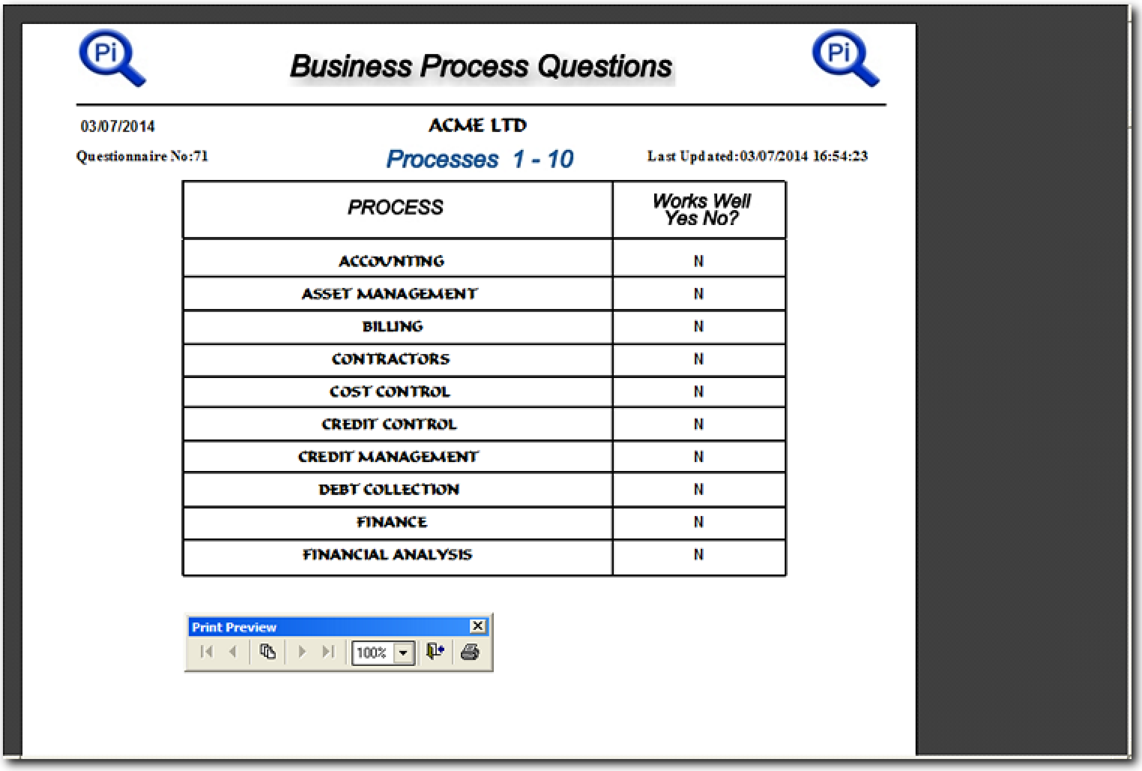


This is the first screen of the 10 available and presents you with the first 10 questions to be answered. The first 10 Business processes are presented and besides each is a check box. For each you must indicate if the Business Process works well, by clicking (placing tick) in the related check box. For those Business Processes that need enhancement or do not currently exist within your company should be left blank.

Once you have completed the answers for this screen you should proceed through the questionnaire to answer all 100 questions. Navigation is achieved by clicking the navigation buttons of the left hand side of each screen which allow you to proceed logically through the questionnaire or to jump around within it.

Clicking on the Number buttons will give a description of that Business Process

Below the questions are two Print Buttons which allow you to print a copy of the processes and your answers to the current section or to print the complete Business Process Questionnaire and answers.

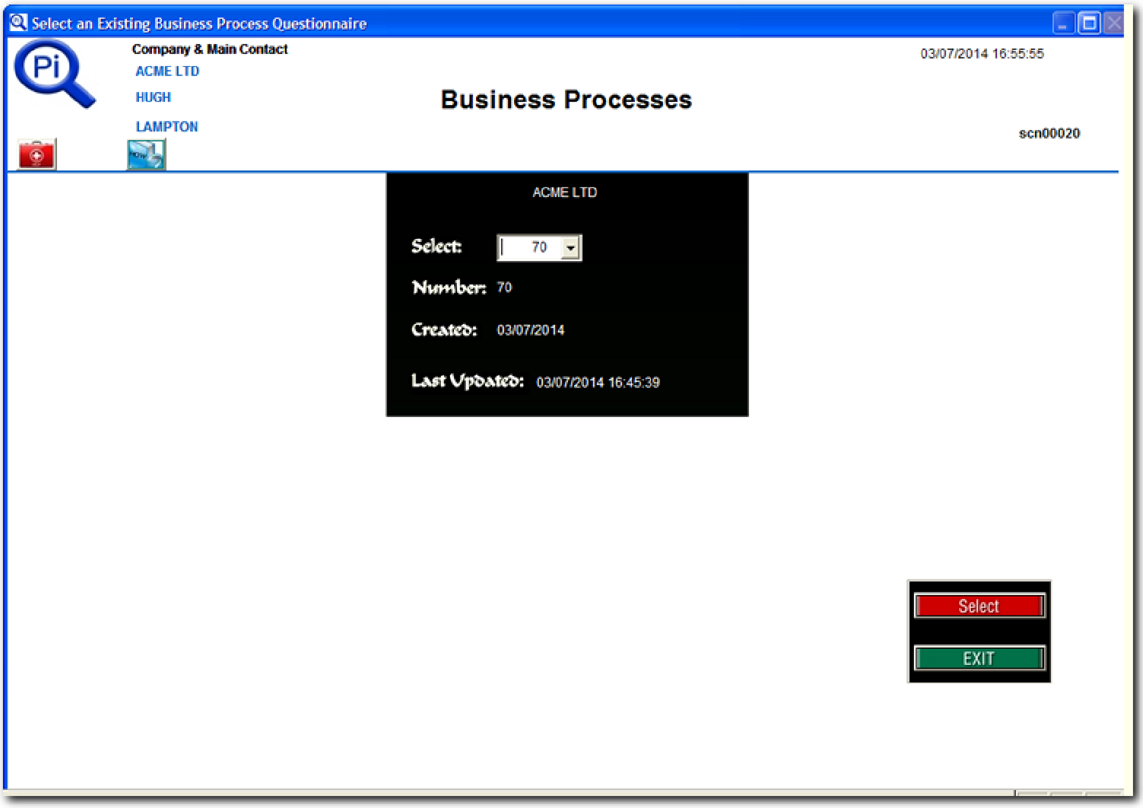


At anytime and on any screen you may save your answers or exit back to the Business Process Sub-Menu by use of the **SAVE** and **EXIT** buttons located at the bottom right hand section of each screen.

2.17 Business Processes - Existing

This section is one of the most crucial parts of Pi. In this section you must answer questions that directly relate to the Business Processes of your company (employer). There are 100 questions to be answered available from the 10 screens of this section of Pi.

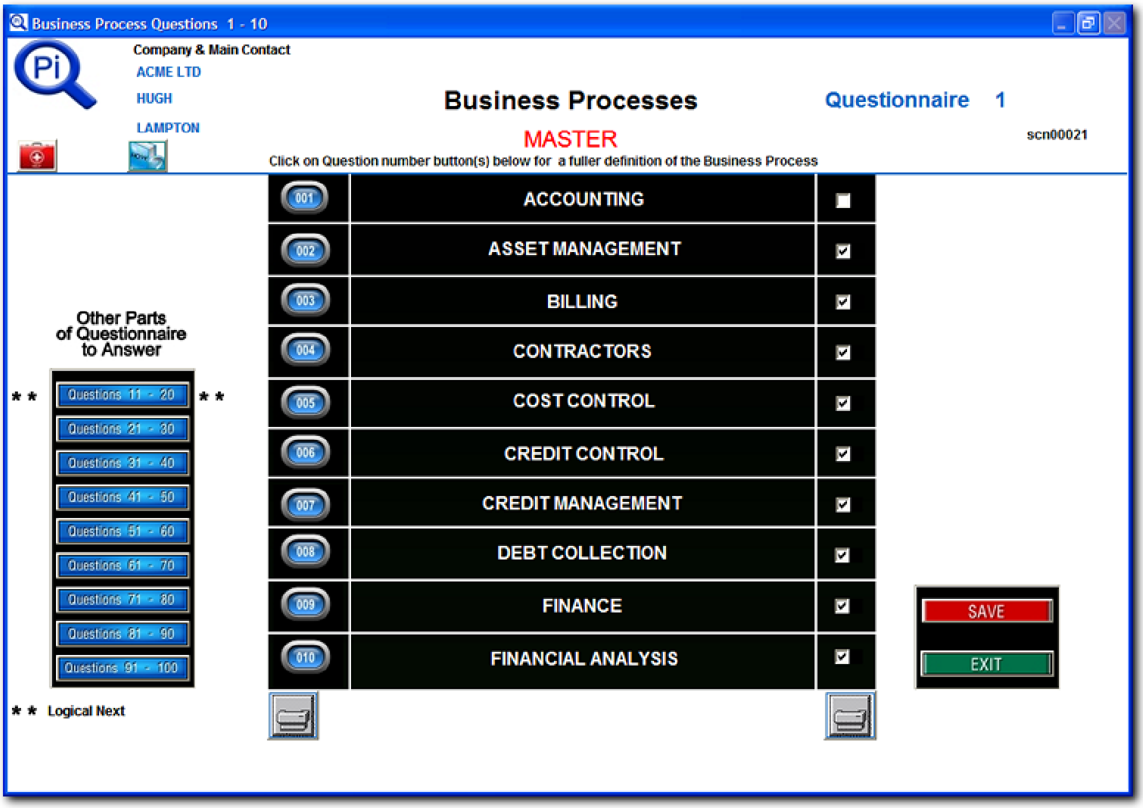
When the option is selected from The Business Processes Sub-Menu the following screen is displayed:



Here you can select from the various Questionnaires that are available under your company number. These can be different versions of your Business Process answers and can be used to analyse the effect on your overall Information Capability Score.(IC Results/Graph option from the control centre menu) in a what-if scenario.

Note: When you ask Pi to 'Run Analysis' or the Strategy,Route Map or Projects results from the control centre menu it will always use MASTER questionnaires. These MASTER are used to hold the TRUE or REAL position of the selected company (current scenario) of each questionnaire and effect the recommendations and output that Pi produces. On this selection screen and the following questionnaire screens Pi will clearly inform you when you are editing the “MASTER” questionnaire.

Once you have selected the questionnaire that wish to use you should click the Select button and the following screen is displayed:

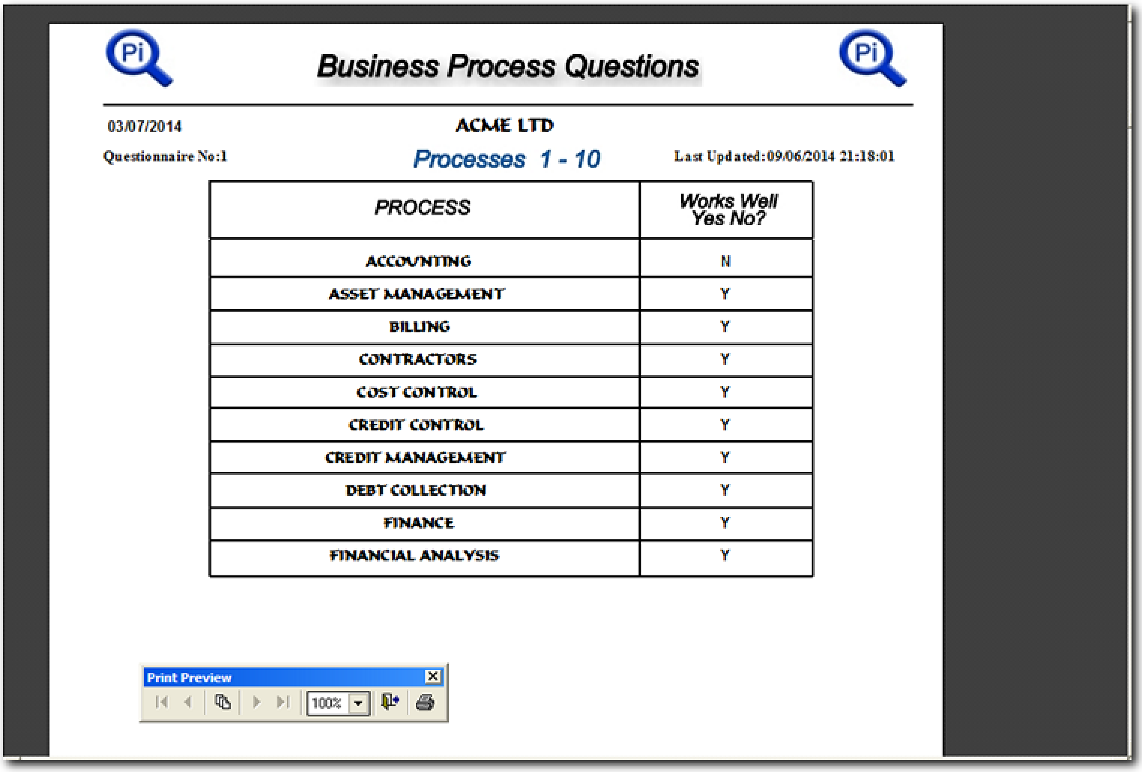


This is the first screen of the 10 available and presents you with the first 10 questions to be answered. The first 10 Business processes are presented and besides each is a check box. For each you must indicate if the Business Process works well, by clicking (placing tick) in the related check box. For those Business Processes that need enhancement or do not currently exist within your company the related check-box should be left blank. (to remove an existing tick just click the relevant check-box)

Clicking on the Number buttons will give a description of that Business Process

Once you have completed the answers for this screen you should proceed through the questionnaire to answer all 100 questions. Navigation is achieved by clicking the navigation buttons of the left hand side of each screen which allow you to proceed logically through the questionnaire or to jump around within it.

Below the questions are two Print Buttons which allow you to print a copy of the processes and your answers to the current section or to print the complete Business Process Questionnaire and answers.Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk


Business Process Questions

03/07/2014 ACME LTD

Questionnaire No:1 Processes 1 - 10 Last Updated:09/06/2014 21:18:01

PROCESS	Works Well Yes No?
ACCOUNTING	N
ASSET MANAGEMENT	Y
BILLING	Y
CONTRACTORS	Y
COST CONTROL	Y
CREDIT CONTROL	Y
CREDIT MANAGEMENT	Y
DEBT COLLECTION	Y
FINANCE	Y
FINANCIAL ANALYSIS	Y

At anytime and on any screen you may save your answers or exit back to the Business Process Sub-Menu by use of the **SAVE** and **EXIT** buttons located at the bottom right hand section of each screen.

2.18 Goals & Objectives - New

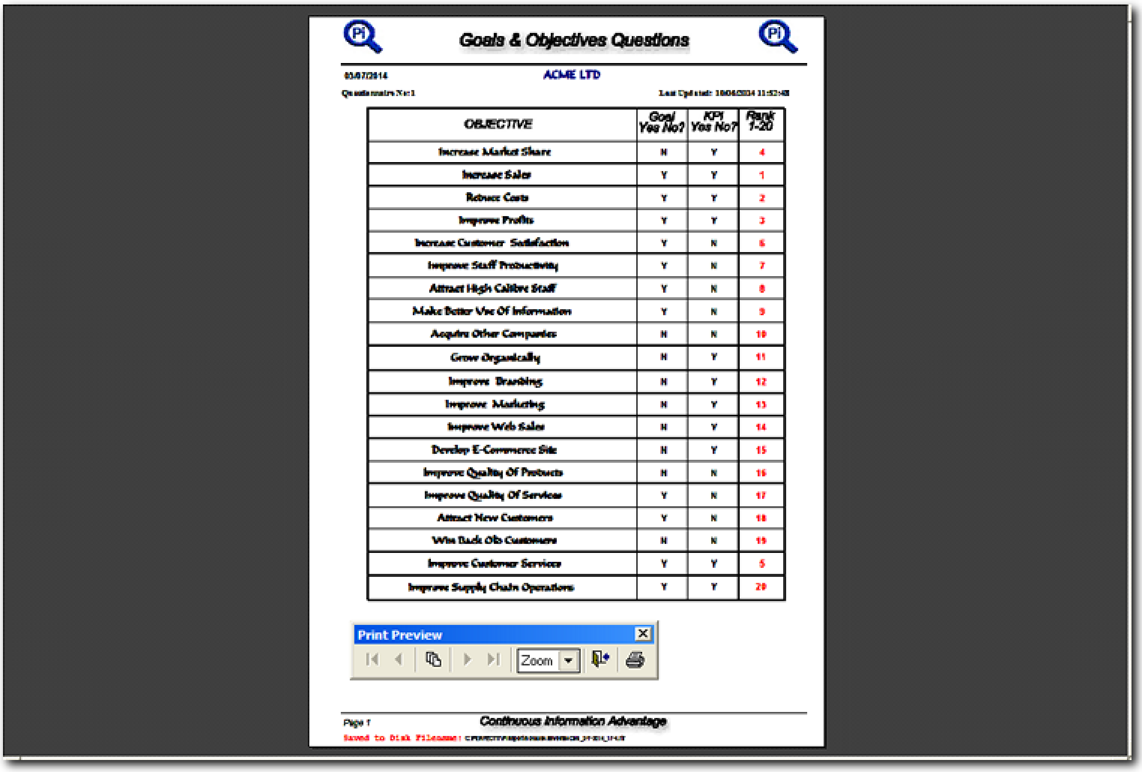
This section of Pi deals with identifying the Business Goals, Objectives and Key Performance Indicators (KPIs) of your Company. In this section the you must answer questions that directly relate to these topics. There are 20 questions to be answered available from the 2 screens of this section of Pi.

When the option is selected from The Goals & Objectives Sub-Menu the following screen is displayed:

This is the first screen of the 2 available and presents you with the first 10 questions to be answered. The first 10 Objectives are presented and besides each are two check boxes and a drop-down selection box. For each you must indicate if Objective represents a GOAL and/or a KPI by clicking (placing tick) in the related check boxes. You must then select the rank (order of importance) that the Objective represents by use of a drop down list box, containing the values 1 -20.

Once you have completed the answers for this screen you should proceed through the questionnaire to answer all 20 questions. Navigation is achieved by clicking the navigation button of the left hand side of each screen which allow you to proceed logically through the questionnaire or to jump around within it.

Below the questions is a Print Button which allows you to print a copy of the Objectives and the answers entered.



Goals & Objectives Questions

ACME LTD

OBJECTIVE	Goal Yes No?	KPI Yes No?	Rank 1-20
Increase Market Share	N	Y	4
Increase Sales	Y	Y	1
Reduce Costs	Y	Y	2
Improve Profits	Y	Y	3
Increase Customer Satisfaction	Y	N	6
Improve Staff Productivity	Y	N	7
Attract High Calibre Staff	Y	N	8
Make Better Use Of Information	Y	N	9
Acquire Other Companies	N	N	10
Grow Organically	N	Y	11
Improve Branding	N	Y	12
Improve Marketing	N	Y	13
Improve Web Sales	N	Y	14
Develop E-Commerce Site	N	Y	15
Improve Quality Of Products	N	N	16
Improve Quality Of Services	Y	N	17
Attract New Customers	Y	N	18
Win Back Old Customers	N	N	19
Improve Customer Services	Y	Y	5
Improve Supply Chain Operations	Y	Y	20

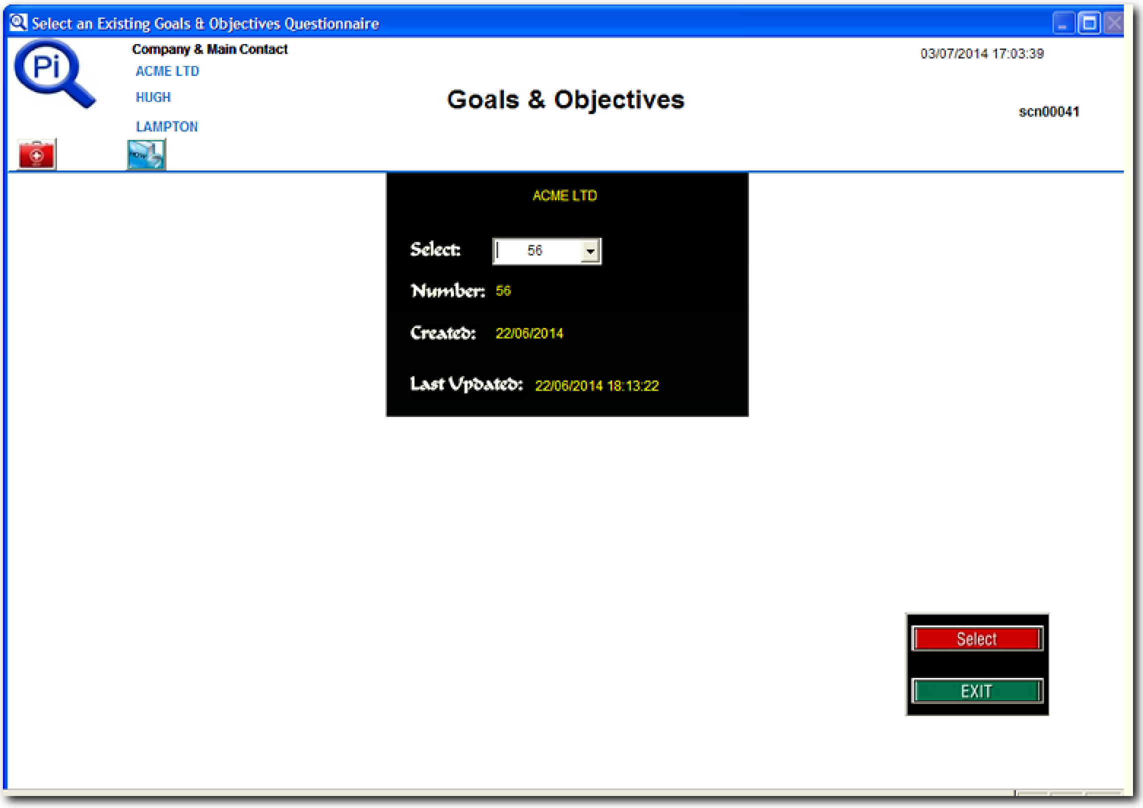
Page 1 Continuous Information Advantage

At anytime and on any screen you may save your answers or exit back to the Goals & Objectives Sub-Menu by use of the **SAVE** and **EXIT** buttons located at the bottom right hand section of each screen.

2.19 Goals & Objectives - Existing

This section of Pi deals with identifying the Business Goals, Objectives and Key Performance Indicators (KPIs) of your Company. In this section the you must answer questions that directly relate to these topics. There are 20 questions to be answered available from the 2 screens of this section of Pi.

When the option is selected from The Goals & Objectives Sub-Menu the following screen is displayed:



Here you can select from the various Questionnaires that are available under your company number. These can be different versions of your Goals & Objectives answers.

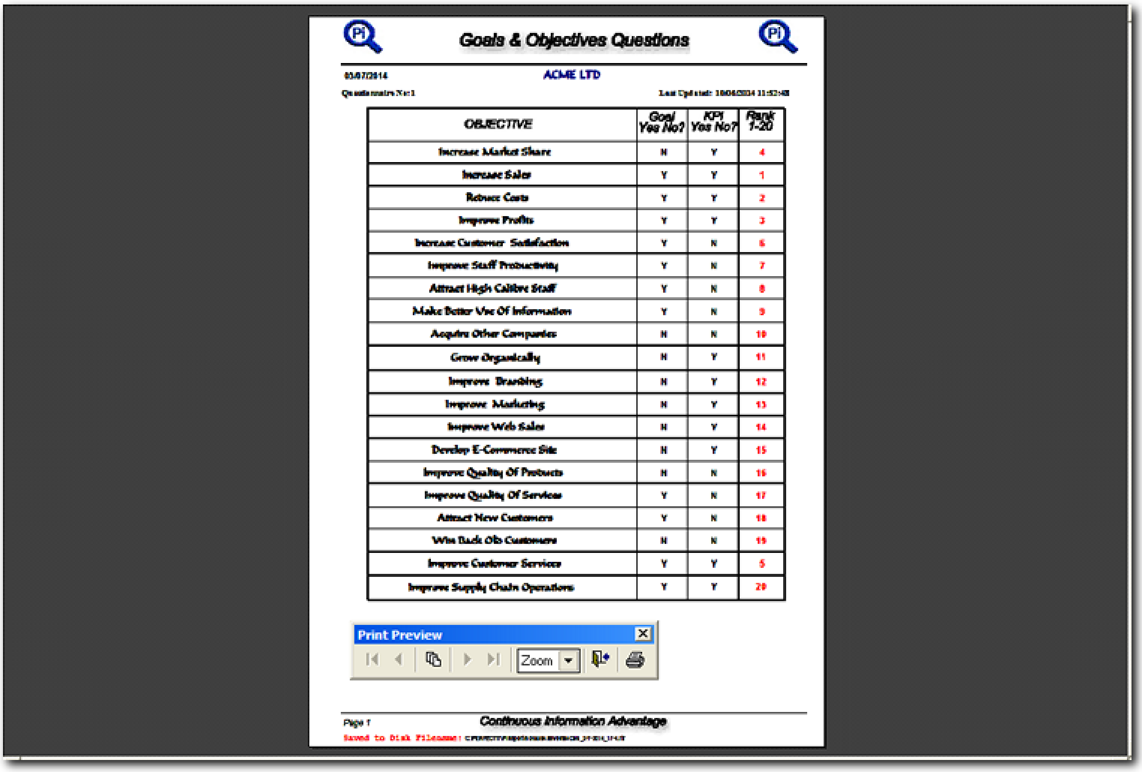
Note: When you ask Pi to 'Run Analysis' it will always use the MASTER questionnaires. Theses are the TRUE version (current scenario) of each questionnaire and effect the recommendations and output that Pi produces. On this selection screen and the following questionnaire screens Pi will clearly inform you that you are editing the “MASTER” questionnaire.

Once you have selected the questionnaire that wish to use you should click the Select button and the following screen is displayed:

This is the first screen of the 2 available and presents you with the first 10 questions to be answered. The first 10 Objectives are presented and besides each are two check boxes and a drop-down selection box. For each you must indicate if Objective represents a GOAL and/or a KPI by clicking (placing tick) in the related check boxes. You must then select the rank (order of importance) that the Objective represents by use of a drop down list box, containing the values 1 -20.

Once you have completed the answers for this screen you should proceed through the questionnaire to answer all 20 questions. Navigation is achieved by clicking the navigation button of the left hand side of each screen which allow you to proceed logically through the questionnaire or to jump around within it.

Below the questions is a Print Button which allows you to print a copy of the Objectives and the answers entered.Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk



Goals & Objectives Questions

ACME LTD

OBJECTIVE	Goal Yes No?	KPI Yes No?	Rank 1-20
Increase Market Share	N	Y	4
Increase Sales	Y	Y	1
Reduce Costs	Y	Y	2
Improve Profits	Y	Y	3
Increase Customer Satisfaction	Y	N	6
Improve Staff Productivity	Y	N	7
Attract High Calibre Staff	Y	N	8
Make Better Use Of Information	Y	N	9
Acquire Other Companies	N	N	10
Grow Organically	N	Y	11
Improve Branding	N	Y	12
Improve Marketing	N	Y	13
Improve Web Sales	N	Y	14
Develop E-Commerce Site	N	Y	15
Improve Quality Of Products	N	N	16
Improve Quality Of Services	Y	N	17
Attract New Customers	Y	N	18
Win Back Old Customers	N	N	19
Improve Customer Services	Y	Y	5
Improve Supply Chain Operations	Y	Y	20

Page 1 Continuous Information Advantage

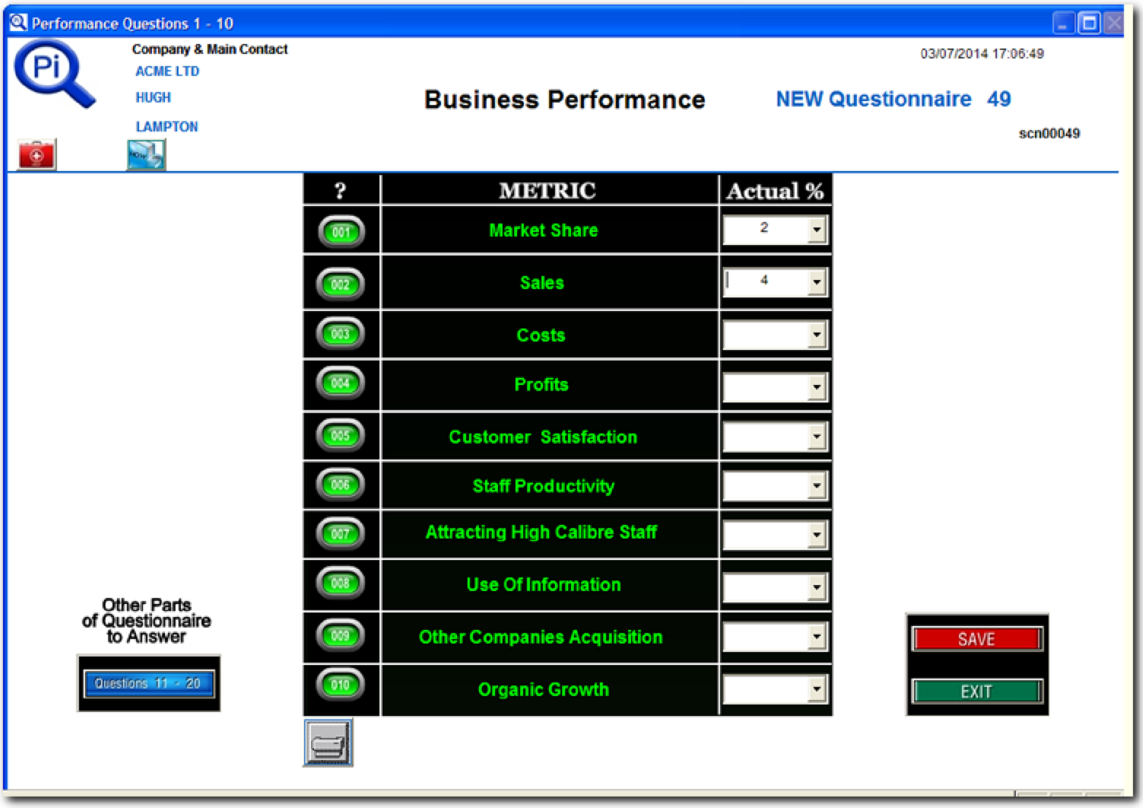
Saved to Disk Filename:

At anytime and on any screen you may save your answers or exit back to the Goals & Objectives Sub-Menu by use of the **SAVE** and **EXIT** buttons located at the bottom right hand section of each screen.

2.20 Performance - NEW

This section of Pi deals with identifying the Performance Metrics of your Company. In this section you must answer questions that directly relate to these topics. There are 20 questions to be answered available from the 2 screens of this section of Pi.

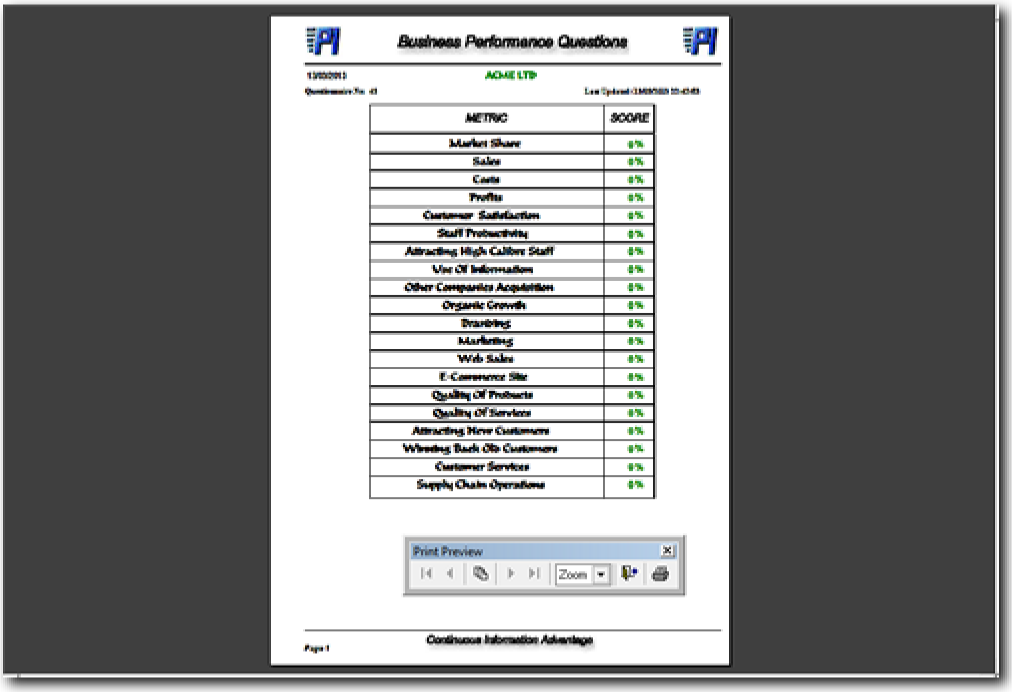
When the option is selected from The Performance Sub-Menu the following screen is displayed:



This is the first screen of the 2 available and presents you with the first 10 questions to be answered. The first 10 Performance Metrics are presented and besides each is a drop-down selection box. For each you must the percentage being currently achieved in terms of performance. The Drop down box allows selection of percentage s from 1 -100.

Once you have completed the answers for this screen you should proceed through the questionnaire to answer all 20 questions. Navigation is achieved by clicking the navigation button of the left hand side of each screen which allow you to proceed logically through the questionnaire or to jump around within it.

Below the questions is a Print Button which allows you to print a copy of the Metrics and the answers entered.

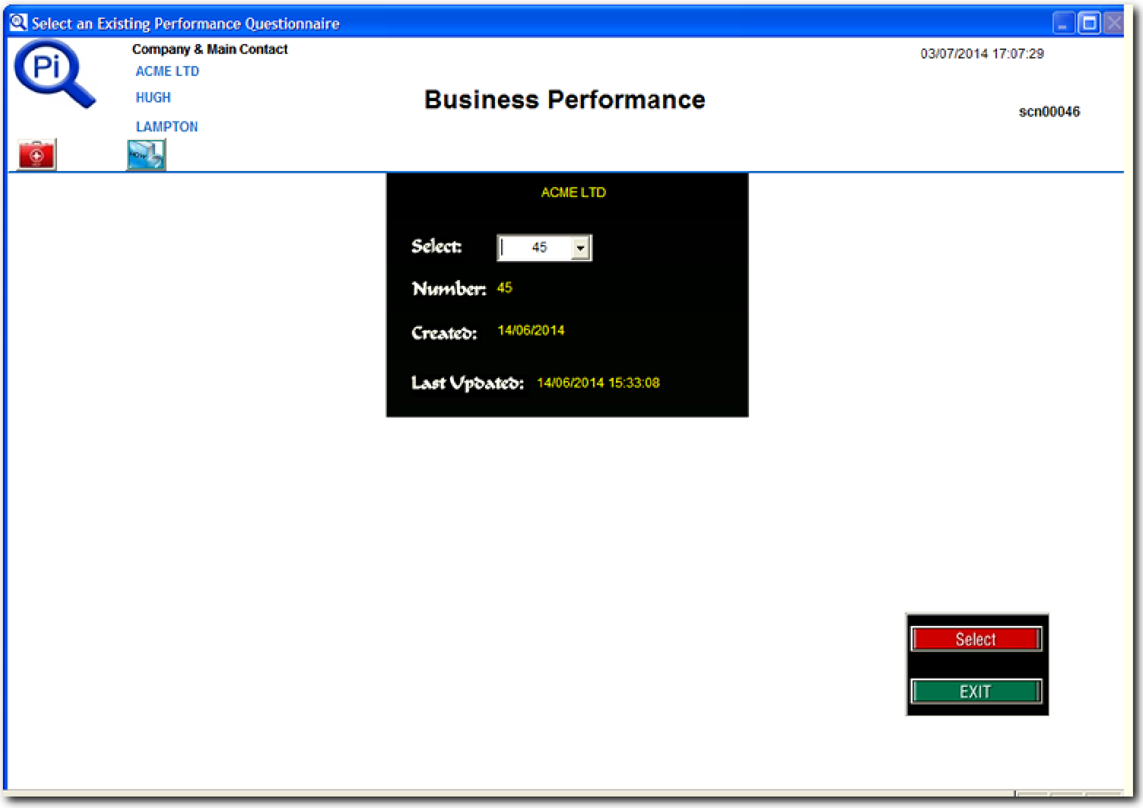


At anytime and on any screen you may save your answers or exit back to the Performance Sub-Menu by use of the **SAVE** and **EXIT** buttons located at the bottom right hand section of each screen.

2.21 Performance - Existing

This section of Pi deals with identifying the Performance Metrics of your Company. In this section you must answer questions that directly relate to these topics. There are 20 questions to be answered available from the 2 screens of this section of Pi.

When the option is selected from The Performance Sub-Menu the following screen is displayed:



Here you can select from the various Questionnaires that are available under your company number. These can be different versions of your Performance answers and can be used to analyse the effect on your overall Information Capability Score.

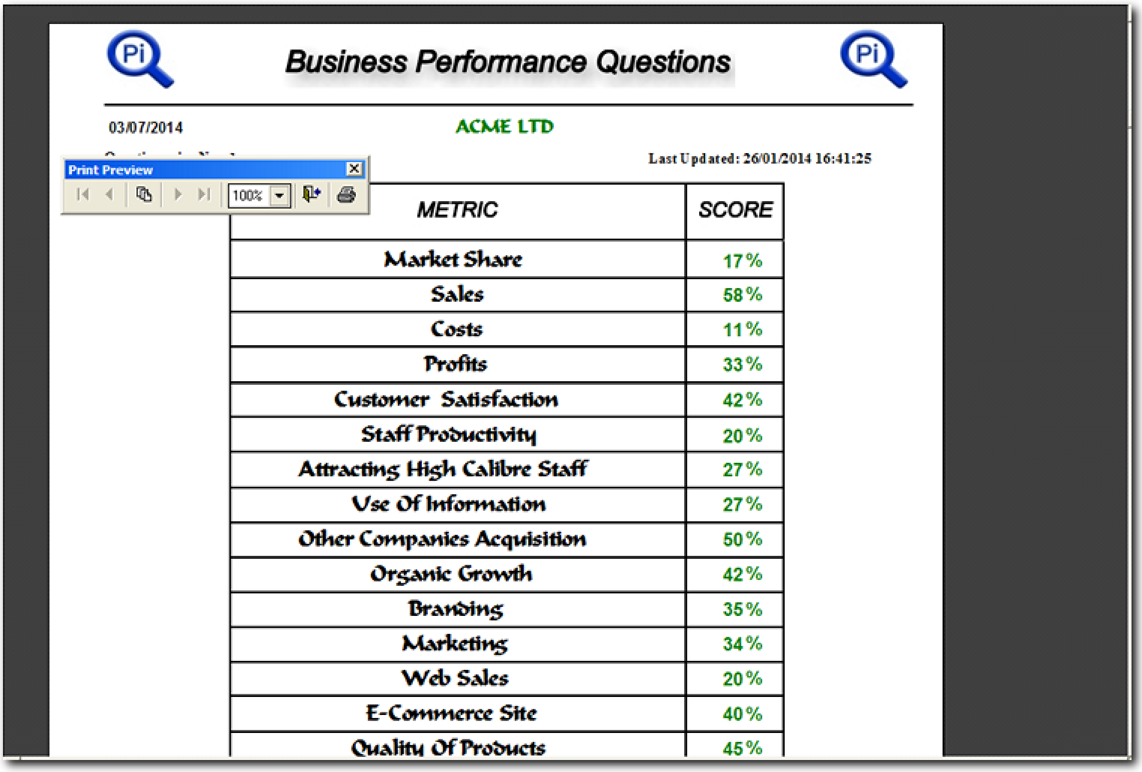
Note: When you ask Pi to 'Run Analysis' it will always use the MASTER questionnaires. Theses are the TRUE version (current scenario) of each questionnaire and effect the recommendations and output that Pi produces. On this selection screen and the following questionnaire screens Pi will clearly inform you that you are editing the “MASTER” questionnaire.

Once you have selected the questionnaire that wish to use you should click the Select button and the following screen is displayed:

This is the first screen of the 2 available and presents you with the first 10 questions to be answered. The first 10 Performance Metrics are presented and besides each is a drop-down selection box. For each you must the percentage being currently achieved in terms of performance. The Drop down box allows selection of percentage s from 1 -100.

Once you have completed the answers for this screen you should proceed through the questionnaire to answer all 20 questions. Navigation is achieved by clicking the navigation button of the left hand side of each screen which allow you to proceed logically through the questionnaire or to jump around within it.

Below the questions is a Print Button which allows you to print a copy of the Metrics and the answers entered.Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk



Business Performance Questions

03/07/2014

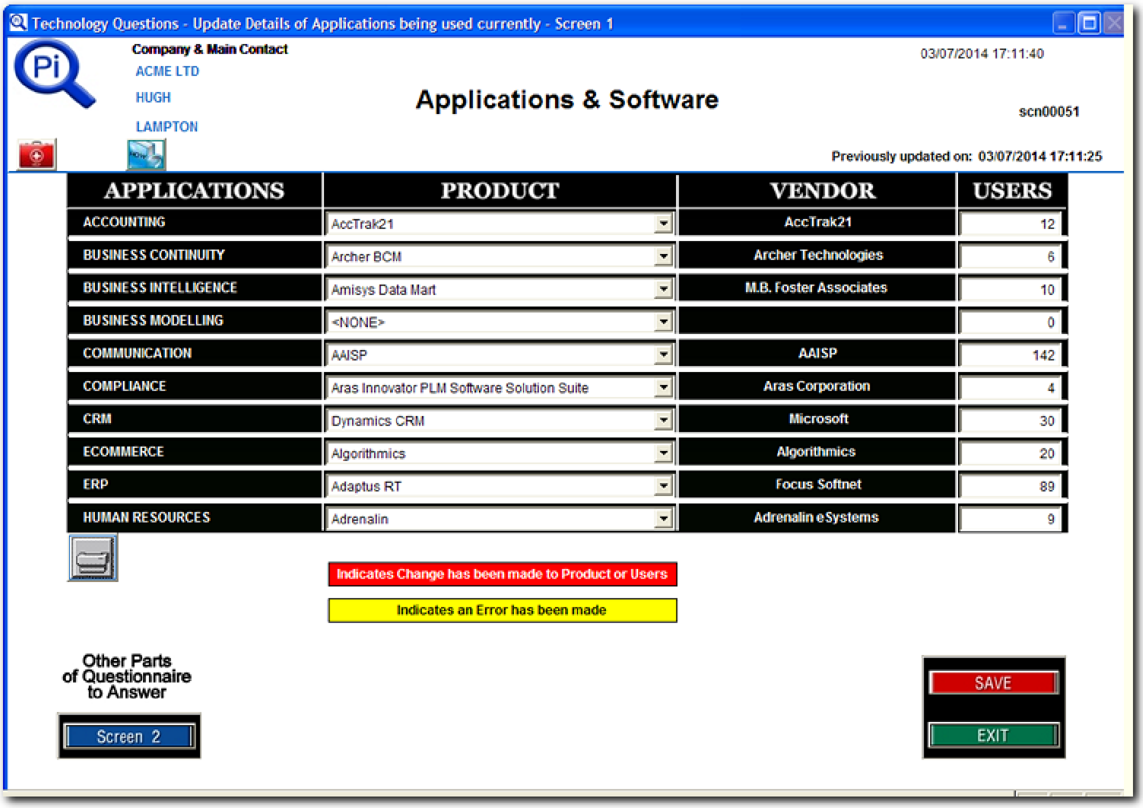
ACME LTD

Last Updated: 26/01/2014 16:41:25

METRIC	SCORE
Market Share	17 %
Sales	58 %
Costs	11 %
Profits	33 %
Customer Satisfaction	42 %
Staff Productivity	20 %
Attracting High Calibre Staff	27 %
Use Of Information	27 %
Other Companies Acquisition	50 %
Organic Growth	42 %
Branding	35 %
Marketing	34 %
Web Sales	20 %
E-Commerce Site	40 %
Quality Of Products	45 %

At anytime and on any screen you may save your answers or exit back to the Performance Sub-Menu by use of the **SAVE** and **EXIT** buttons located at the bottom right hand section of each screen.

2.22 Applications

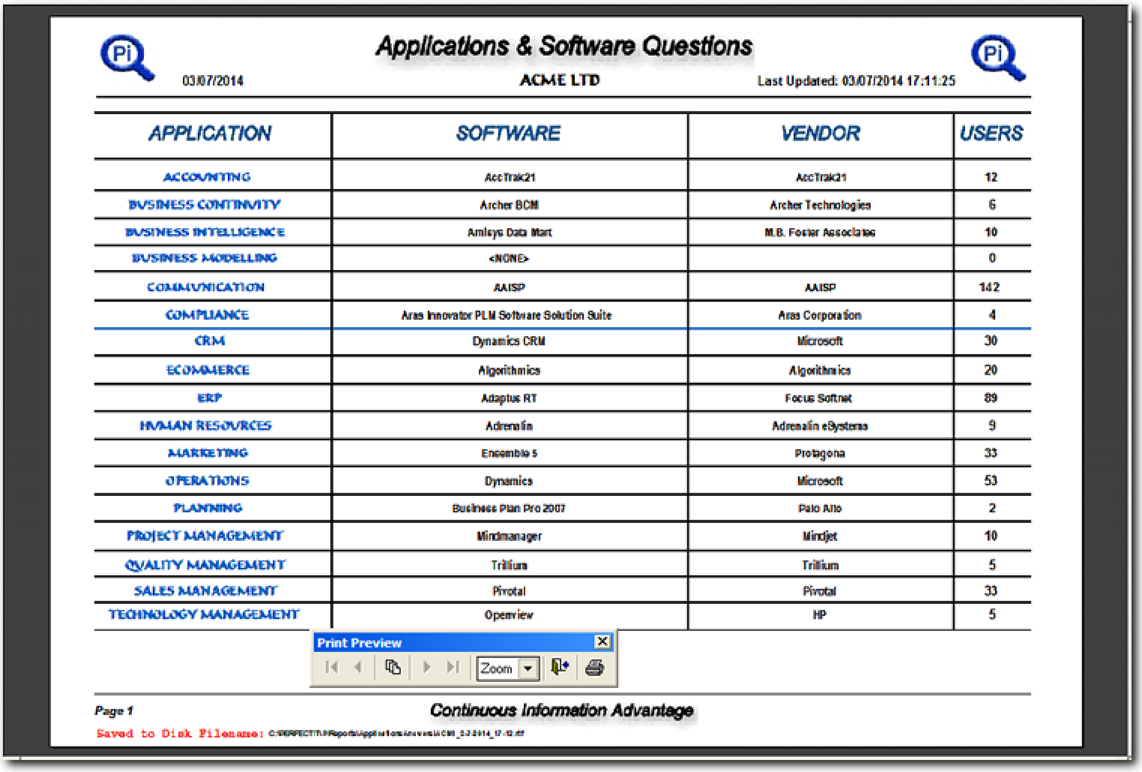


Here you are presented with two screens on which you must identify the products in use and numbers of users for each of the 17 application areas.

Selection of product for each application area is made by use of a drop-down pick list.
You must select a product which will automatically populate the vendor details and then identify how many users actually use this application. (If you do not use any products for an application area you must indicate this by selecting **<NONE>** from the drop down list.)

Once you have completed the answers for this screen you should proceed through the questionnaire to complete details for all 17 application areas. Navigation is achieved by clicking the navigation button of the left hand side of each screen which allow you to proceed logically through the questionnaire or to jump around within it.

Below the questions is a Print Button which allows you to print a copy of the Applications and the answers entered.Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk



Applications & Software Questions

03/07/2014 ACME LTD Last Updated: 03/07/2014 17:11:25

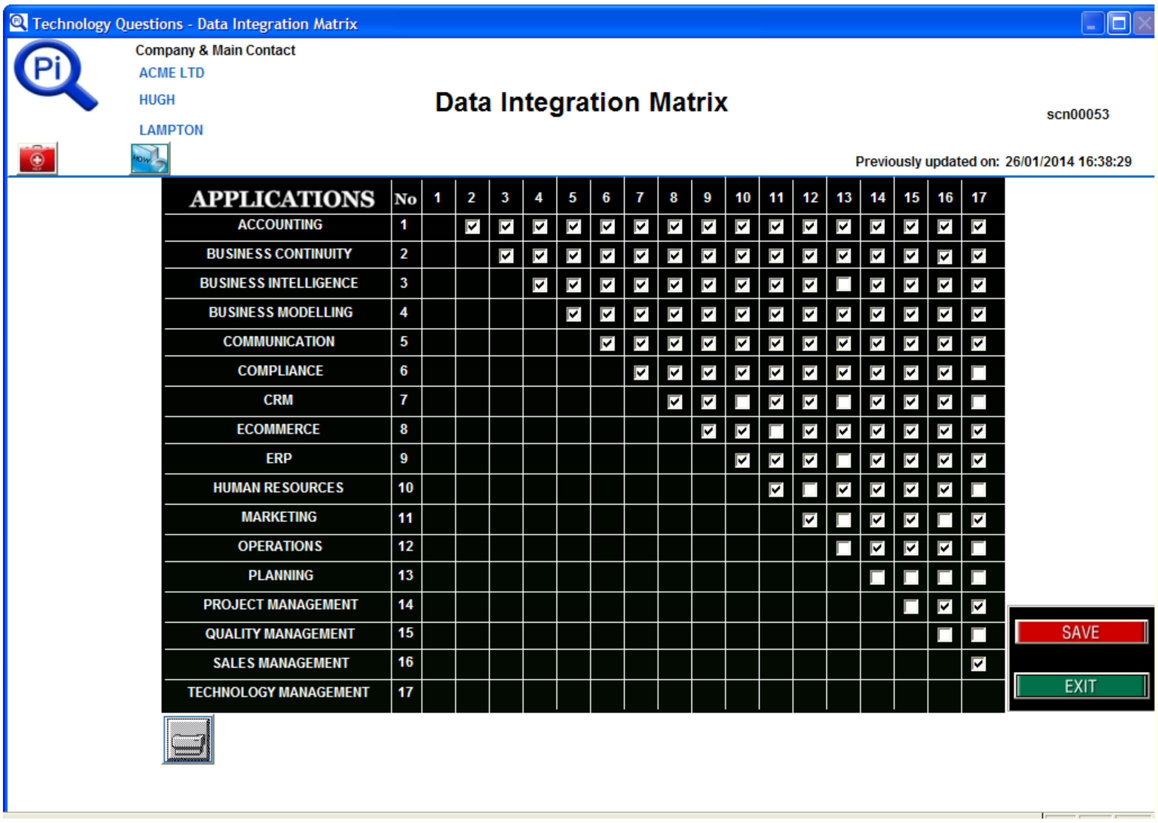
APPLICATION	SOFTWARE	VENDOR	USERS
ACCOUNTING	AccTrak21	AccTrak21	12
BUSINESS CONTINUITY	Archer BCM	Archer Technologies	6
BUSINESS INTELLIGENCE	Amlsys Data Mart	M.B. Foster Associates	10
BUSINESS MODELLING	<NONE>		0
COMMUNICATION	AAISP	AAISP	142
COMPLIANCE	Aras Innovator PLM Software Solution Suite	Aras Corporation	4
CRM	Dynamics CRM	Microsoft	30
ECOMMERCE	Algorithmics	Algorithmics	20
ERP	Adaptus RT	Focus Softnet	89
HUMAN RESOURCES	Adrenalin	Adrenalin eSystems	9
MARKETING	Ensemble 5	Protagona	33
OPERATIONS	Dynamics	Microsoft	53
PLANNING	Business Plan Pro 2007	Palo Alto	2
PROJECT MANAGEMENT	Mindmanager	Mindjet	10
QUALITY MANAGEMENT	Trillium	Trillium	5
SALES MANAGEMENT	Pivotal	Pivotal	33
TECHNOLOGY MANAGEMENT	Openview	HP	5

Page 1 Continuous Information Advantage

Saved to Disk Filename:

At anytime and on any screen you may save your answers or exit back to the Technology Sub Menu by use of the **SAVE** and **EXIT** buttons located at the bottom right hand section of each screen.

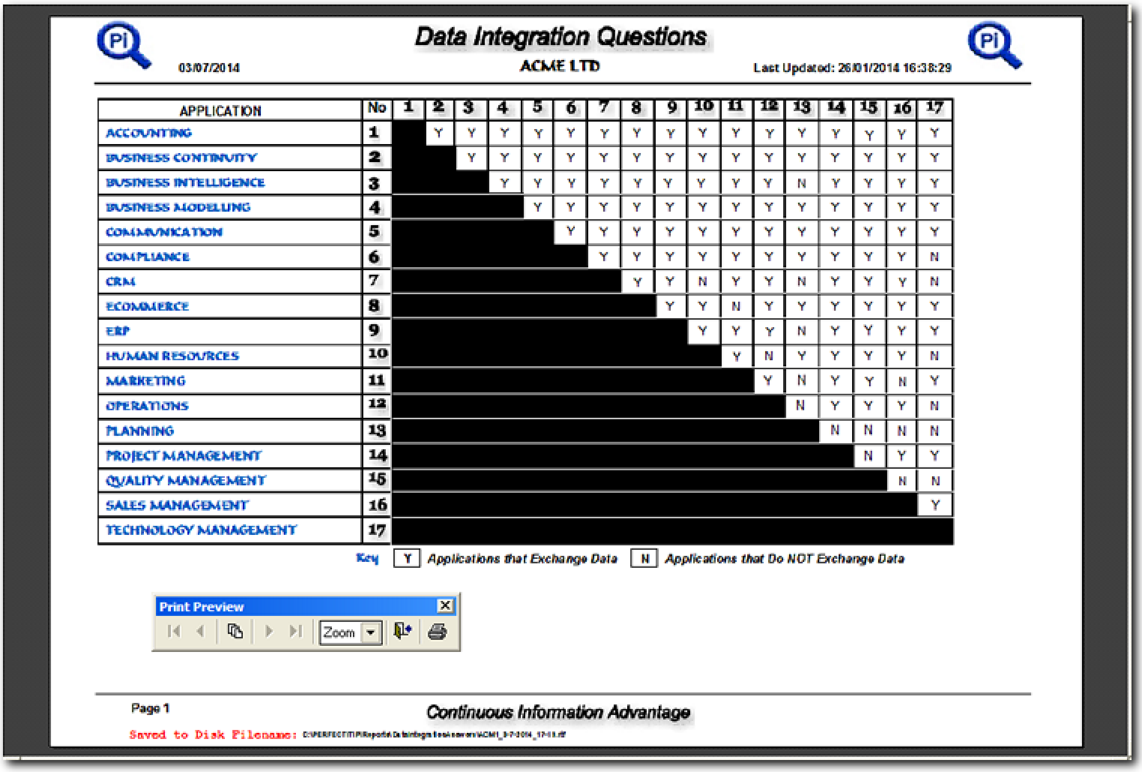
2.23 Data Integration Matrix



Here you are presented with a 17 x 17 Matrix which allows them to indicate which Applications exchange data automatically. You must place ticks (click in boxes) in the matrix at the relevant intersection points.

For ease of use, when you click in any box the names of the Applications exchanging data will be highlighted in the APPLICATIONS column.

Below the questions is a Print Button which allows you to print a copy of the Data Integration Matrix and the answers entered.Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk



Data Integration Questions

03/07/2014 ACME LTD Last Updated: 26/01/2014 16:38:29

APPLICATION	No	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
ACCOUNTING	1		Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
BUSINESS CONTINUITY	2			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
BUSINESS INTELLIGENCE	3				Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y
BUSINESS MODELLING	4					Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
COMMUNICATION	5						Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
COMPLIANCE	6							Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N
CRM	7								Y	Y	N	Y	Y	N	Y	Y	Y	N
ECOMMERCE	8									Y	Y	N	Y	Y	Y	Y	Y	Y
ERP	9										Y	Y	Y	N	Y	Y	Y	Y
HUMAN RESOURCES	10											Y	N	Y	Y	Y	Y	N
MARKETING	11												Y	N	Y	Y	N	Y
OPERATIONS	12													N	Y	Y	Y	N
PLANNING	13														N	N	N	N
PROJECT MANAGEMENT	14															N	Y	Y
QUALITY MANAGEMENT	15																N	N
SALES MANAGEMENT	16																	Y
TECHNOLOGY MANAGEMENT	17																	

Key Y Applications that Exchange Data N Applications that Do NOT Exchange Data

Page 1 Continuous Information Advantage

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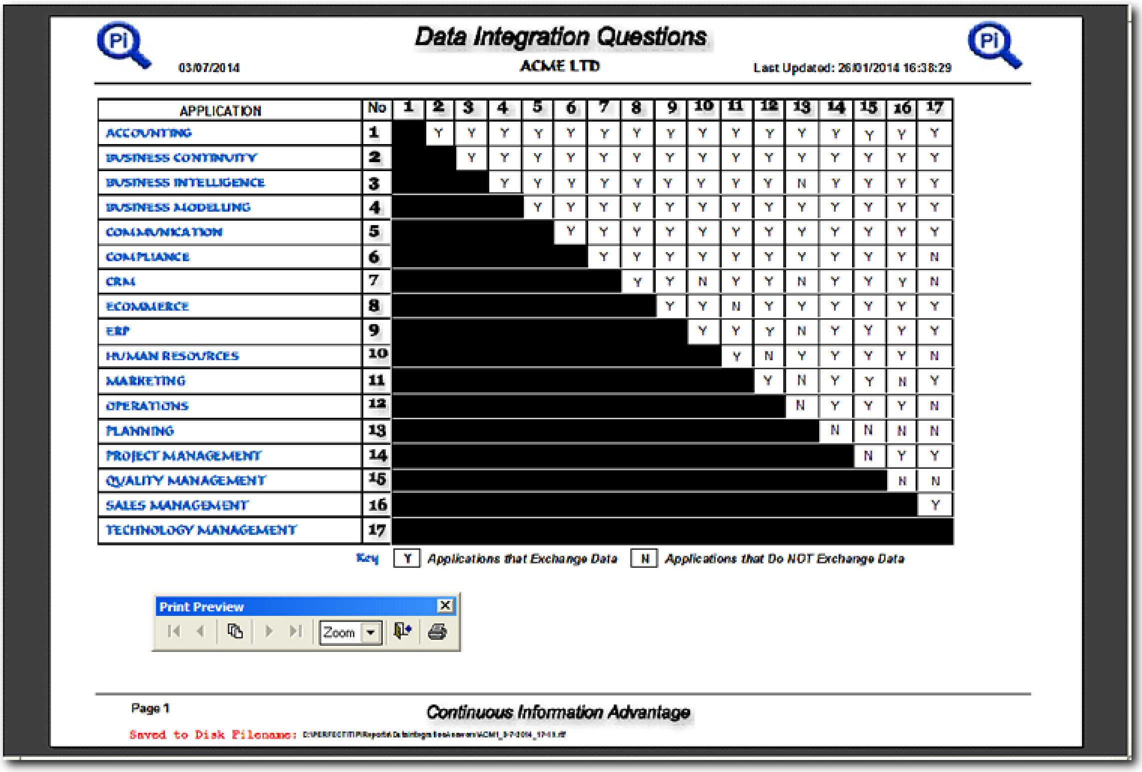

Data Integration Questions

03/07/2014 ACME LTD Last Updated: 26/01/2014 16:38:29

APPLICATION	No	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
ACCOUNTING	1		Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
BUSINESS CONTINUITY	2			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
BUSINESS INTELLIGENCE	3				Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y
BUSINESS MODELLING	4					Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
COMMUNICATION	5						Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
COMPLIANCE	6							Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N
CRM	7								Y	Y	N	Y	Y	N	Y	Y	Y	N
ECOMMERCE	8									Y	Y	N	Y	Y	Y	Y	Y	Y
ERP	9										Y	Y	Y	N	Y	Y	Y	Y
HUMAN RESOURCES	10											Y	N	Y	Y	Y	Y	N
MARKETING	11												Y	N	Y	Y	N	Y
OPERATIONS	12													N	Y	Y	Y	N
PLANNING	13														N	N	N	N
PROJECT MANAGEMENT	14															N	Y	Y
QUALITY MANAGEMENT	15																N	N
SALES MANAGEMENT	16																	Y
TECHNOLOGY MANAGEMENT	17																	

Key Y Applications that Exchange Data N Applications that Do NOT Exchange Data

Page 1 Continuous Information Advantage

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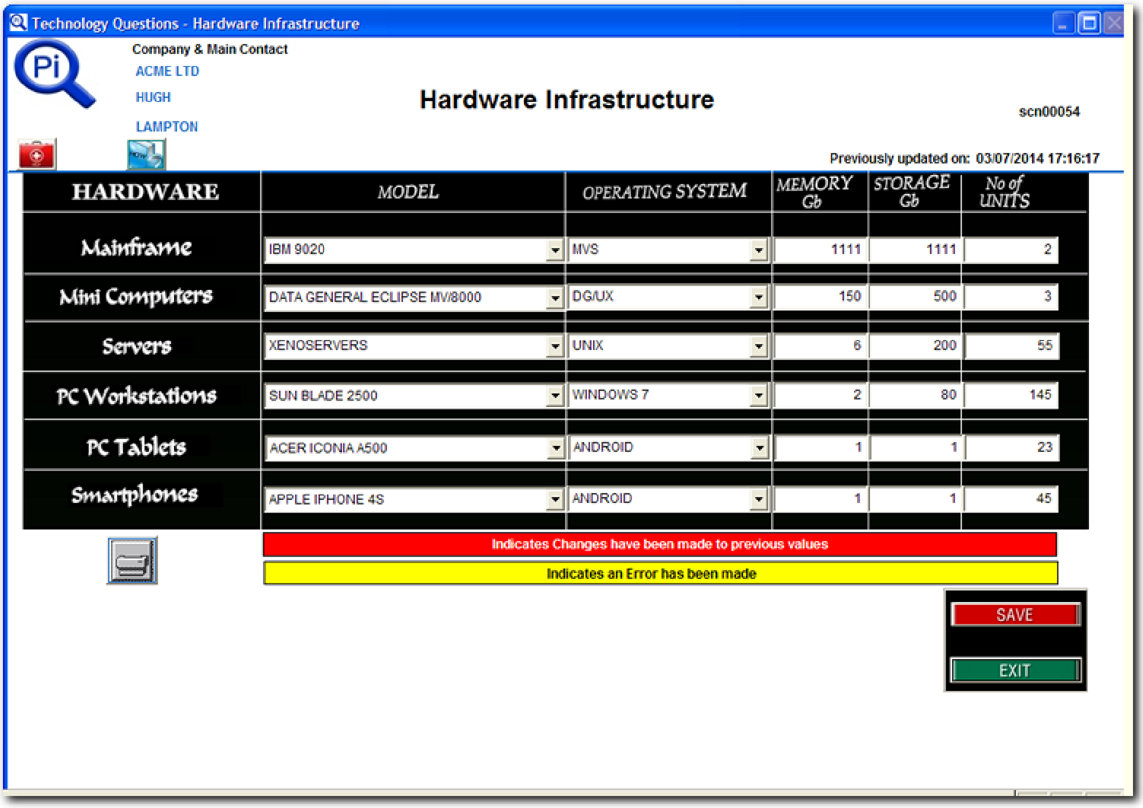
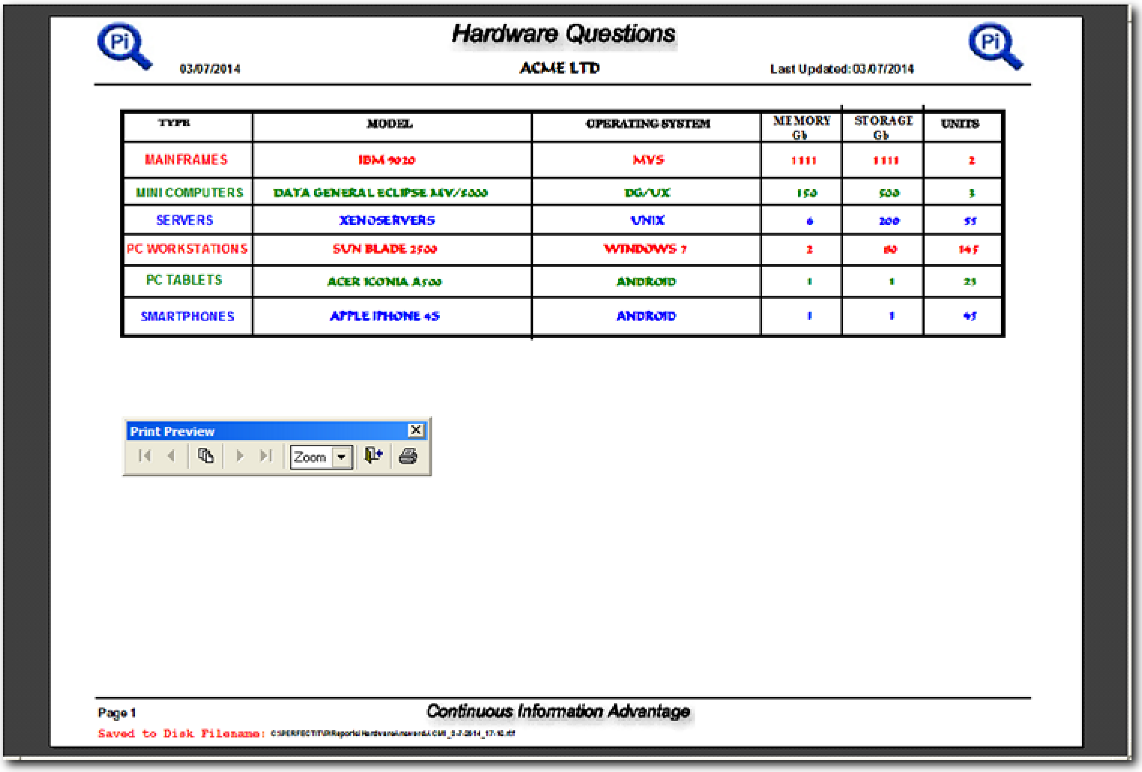
At anytime and on any screen you may save your answers or exit back to the Technology Sub Menu by use of the **SAVE** and **EXIT** buttons located at the bottom right hand section of each screen.

2.24 Hardware



Here you must enter details of the hardware which is in place within your organisation. You must identify Models, operating systems, memory, data storage and number of units for each of six categories Mainframe, Mini Computer, Servers, PC Workstations, PC Tablets and Smartphones. Drop down lists for Model and Operating systems are provided for ease of use.

Below the questions is a Print Button which allows you to print a copy of the Hardware Matrix and the answers entered.Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk



Hardware Questions

03/07/2014 ACME LTD Last Updated: 03/07/2014

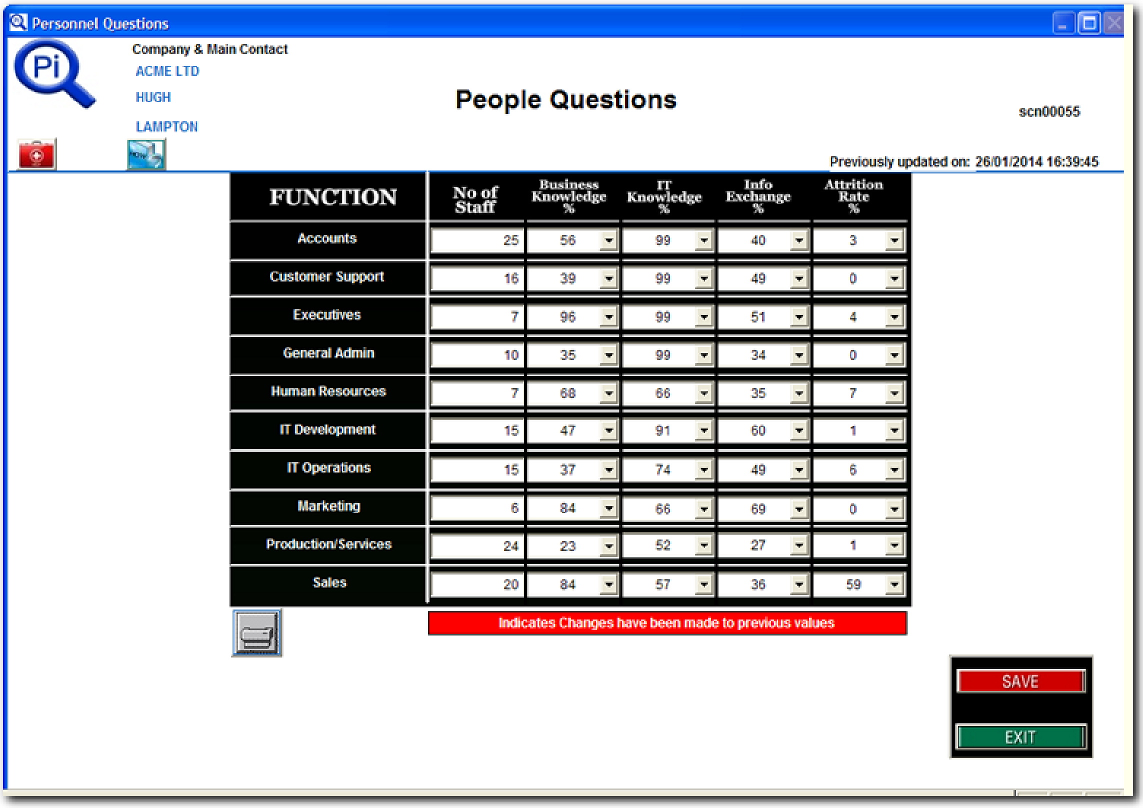
TYPE	MODEL	OPERATING SYSTEM	MEMORY Gb	STORAGE Gb	UNITS
MAINFRAMES	IBM 9020	MVS	1111	1111	2
MINI COMPUTERS	DATA GENERAL ECLIPSE MV/5000	DG/UX	150	500	3
SERVERS	XENOSERVERS	UNIX	6	200	55
PC WORKSTATIONS	SUN BLADE 2500	WINDOWS 7	2	80	145
PC TABLETS	ACER ICONIA A500	ANDROID	1	1	25
SMARTPHONES	APPLE IPHONE 4S	ANDROID	1	1	45

Page 1 Continuous Information Advantage

Saved to Disk Filename:

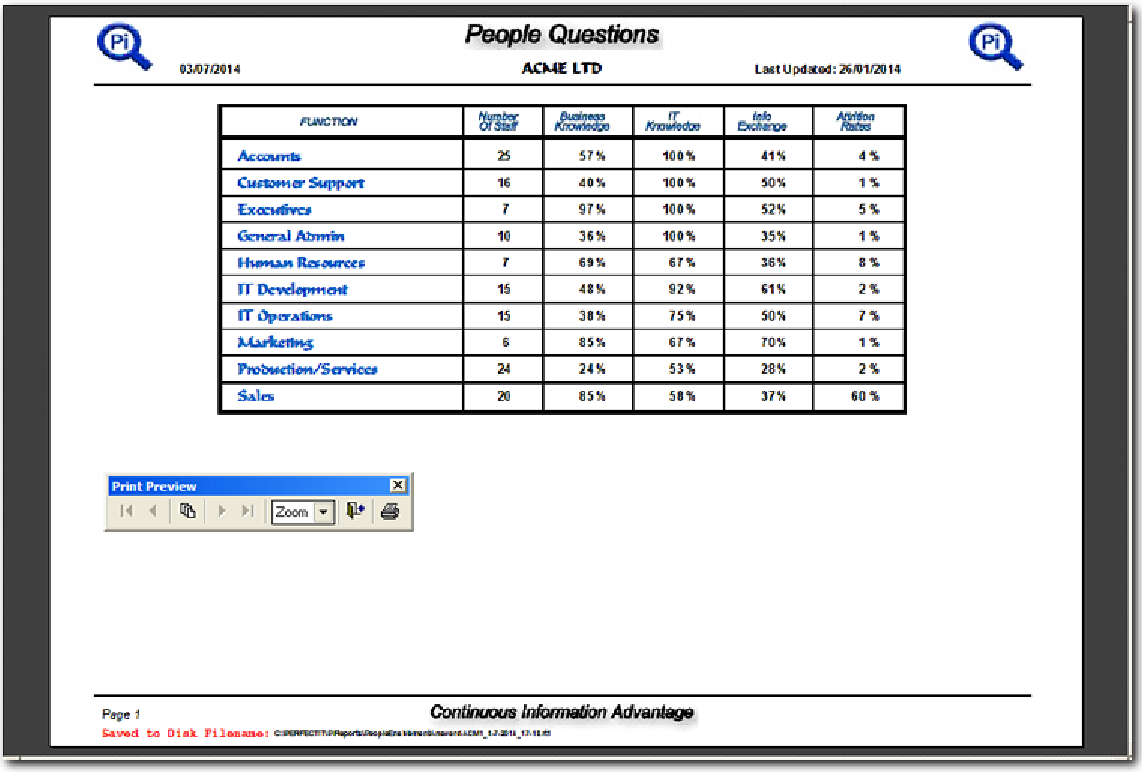
At anytime and on any screen you may save your answers or exit back to the Technology Sub Menu by use of the **SAVE** and **EXIT** buttons located at the bottom right hand section of each screen.

2.25 Personnel



Here you must enter details relating to the personnel of the organisation; The number of staff per function (department), the business knowledge of staff, the competence level in using IT applications, the amount of local information provided to other functions (departments) and attrition rates within each function. For ease of use drop down list are provided for recording percentage figures.

Below the questions is a Print Button which allows you to print a copy of the People Matrix and the answers entered.Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk


People Questions

03/07/2014 ACME LTD Last Updated: 26/01/2014

FUNCTION	Number Of Staff	Business Knowledge	IT Knowledge	Info Exchange	Attrition Rates
Accounts	25	57 %	100 %	41 %	4 %
Customer Support	16	40 %	100 %	50 %	1 %
Executives	7	97 %	100 %	52 %	5 %
General Admin	10	36 %	100 %	35 %	1 %
Human Resources	7	69 %	67 %	36 %	8 %
IT Development	15	48 %	92 %	61 %	2 %
IT Operations	15	38 %	75 %	50 %	7 %
Marketing	6	85 %	67 %	70 %	1 %
Production/Services	24	24 %	53 %	28 %	2 %
Sales	20	85 %	58 %	37 %	60 %

Print Preview

Zoom

Page 1 Continuous Information Advantage

Saved to Disk Filename:

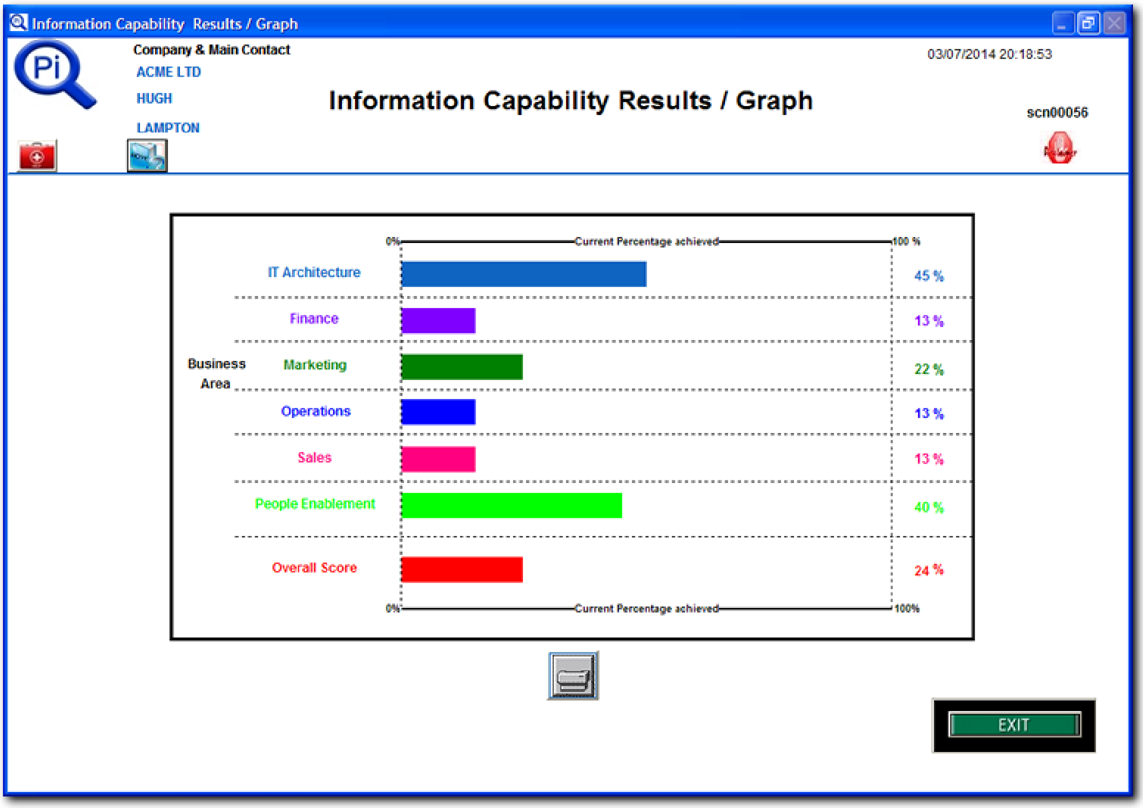
At anytime you may save your answers or exit back to the Control Centre by use of the **SAVE** and **EXIT** buttons located at the bottom right hand section of each screen.

2.26 Run Analysis

Selection of this option from the Control Centre will update all scoring throughout the system by analysing the latest answers and inputs. **Note:** This will always use the Master records from the Performance, Goals/Objectives and Business Processes Questionnaires, as these represent the actual/current position at the User company and it is this position on which Pi makes its recommendations.

Back to Control Centre

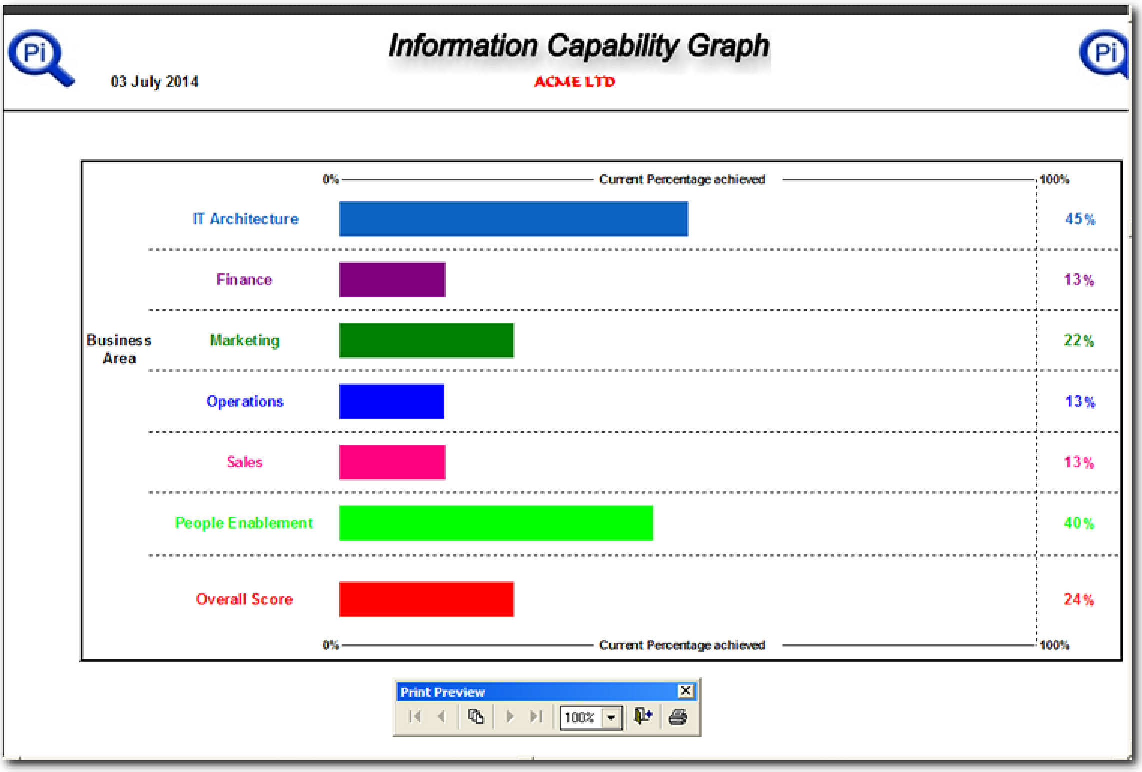
2.27 Information Capability



This allows You to review your company's current Information Capability based on the answers provided by you in the questionnaire sections of the application.

You may also create a hardcopy of the Information Capability Graph by clicking the **Printer Icon** button or may return to the Control Centre of the application by clicking the **EXIT** button.Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk

* Note: In the Performance, Goals/Objectives and Business Processes sections of the application you may have several versions of these questionnaires. For the purpose of this graphic /report, it will be based on the last questionnaire within each section that you have accessed and SAVED. This is useful for “what-if” scenarios. However, the procedures that generate the Strategy, Route Map and Project Plan reports will always use the Master View (record) of these questionnaires as they reflect the actual position of your company and it is this position that Pi bases its recommendations upon.
If you wish to use or re-select the MASTER copies of each questionnaire you should run the Analysis procedure. see Run Analysis



The graph/report is also saved to disk for later review. see View Information Capability Graphs

2.28 Reports saved to disk

All the reports that Pi produces are also saved automatically to disk, in word processor format so that they can be viewed or attached to emails at a later time. This also negates the need to print out reports. Each report displayed on screen indicates at the bottom the disk location of where it is actually saved.

Using the Account Options Menu sub-menu gives you full access to all reports and transactions held on disk.

As the reports are saved in universal word processor format in some packages e.g. MS Word it may be necessary to change the
page orientation to Landscape in order to view or print the report properly. This is easily done by using the **File - Page Setup - Landscape - OK** option from the MS Word Menu system.

2.29 Sequence to use when running Reports

In order to get accurate reports based on the MASTER questionnaire files you should do the following:

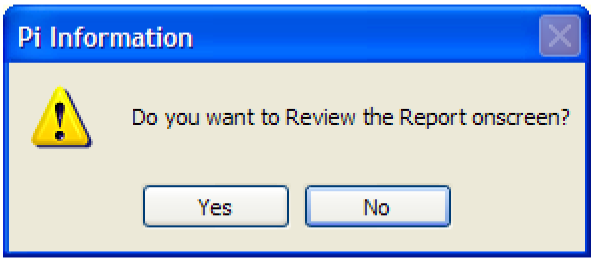
1.Run Analysis This will ensure that the recommended projects are selected
2.If the Salaries of your own project staff or the Daily Rates charged by project subcontractors have changed the you should use
Update Project Resource Details function
3. If you want to update the Project Resource Split viz; allocate staff between your own project staff and external personnel working on projects then you should use one or all of the following functions:
Applications Projects Resources
Business Process Projects Resources
Data Integration Projects Resources
4. Use the Run Analysis function again
5. Run one or all of the following:
Information Strategy Report
Information Route Map Report
Information Projects Report

Using this sequence correctly will ensure the most accurate reports.+

2.30 Information Strategy Report

Note* Before Running this report you should use the Run Analysis function. Also see Sequence to use when running Reports

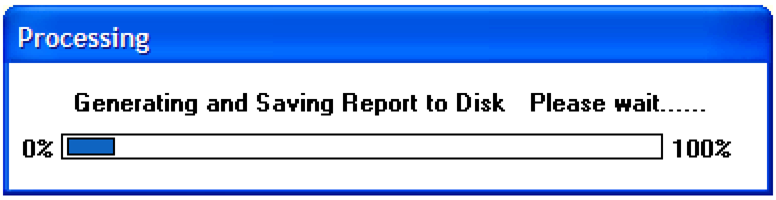
On selection of this option from the main menu, Pi will produce the complete Information Strategy Report.



This consists of:

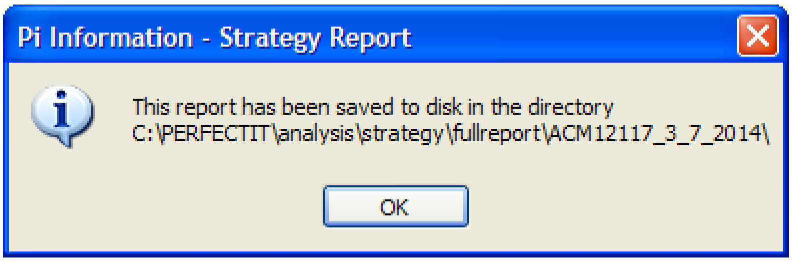
- An Executive Summary
- The Current Position
- Recommended Actions

*A dialogue box allows you to choose to review the report onscreen. If you decide not to review the report onscreen a progress bar will appear whilst the report is written to disk.



*The report is both displayed on screen from where the individual report pages can be printed and is also saved to disk in word processing format.

When the report has been viewed on screen, you are informed, via a message box on screen, of the directory in which the report has been saved and you are then returned to the Control Centre.



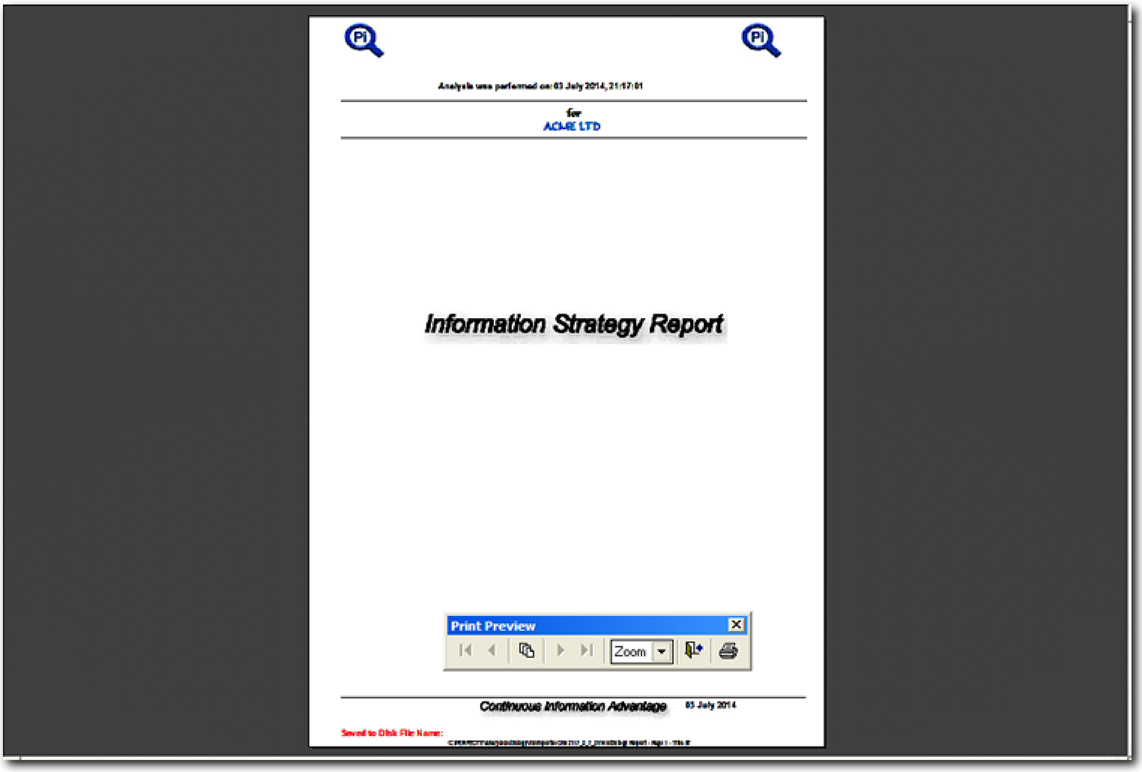
There are 26 sections within the report covering:

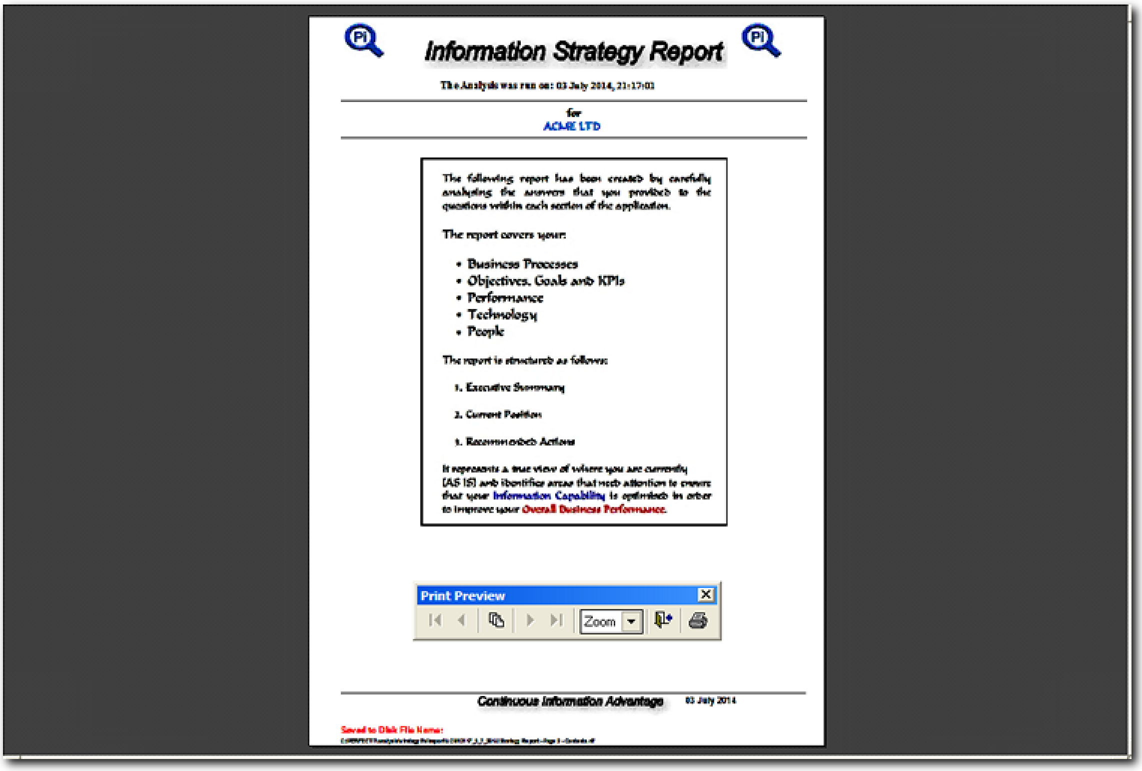
1. Executive Summary

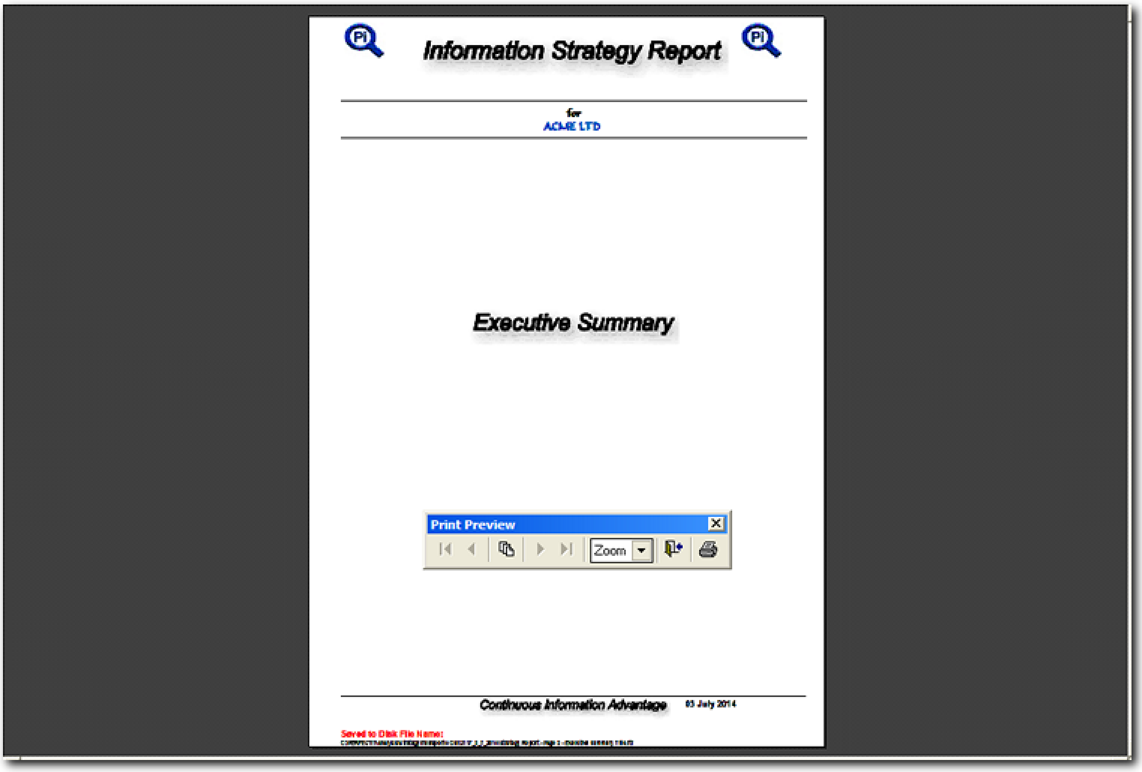
Current Position
2. Good Business Processes
3. Bad Business Processes
4. Business Goals
5. KPIs
6. Importance Rankings
7. Business Performance
8. Applications and Software
9. Hardware
10. Existing Data Integration
11. Required Data Integration
12. Staff Numbers
13. Staff Business Knowledge
14. Staff IT Knowledge
15. Staff Information Exchange
16. Staff Attrition

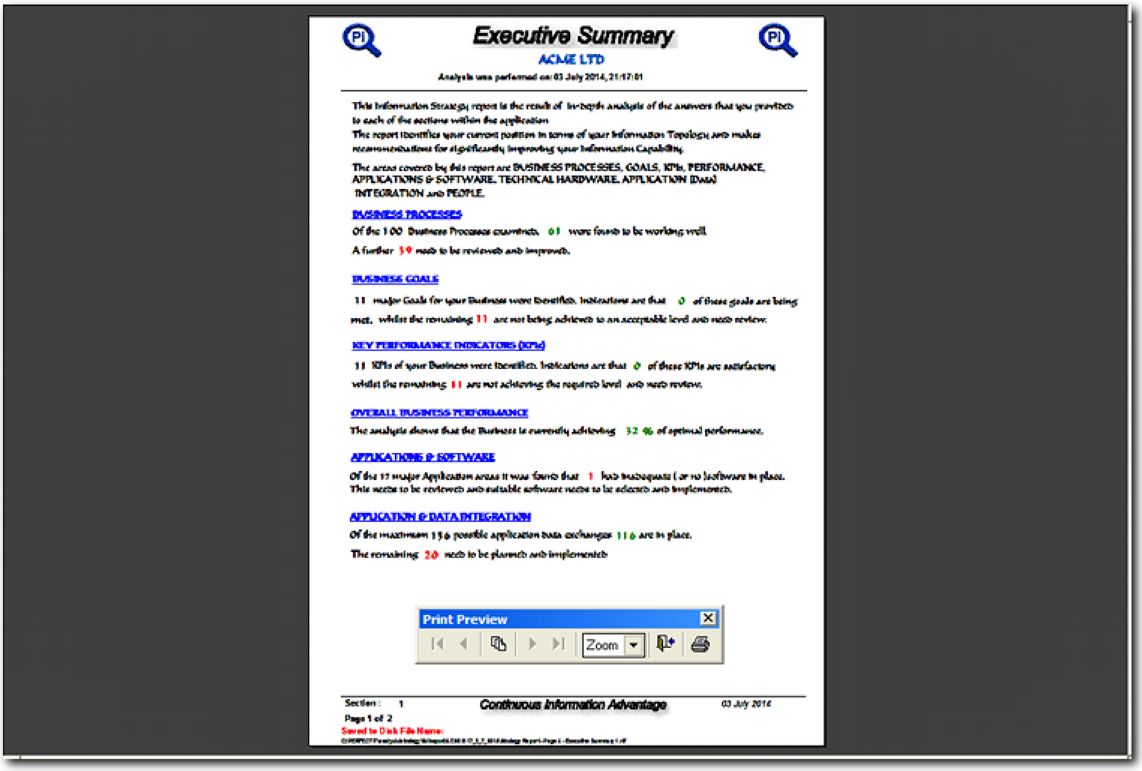
Recommended Actions
17. Business Processes to Review
18. Goals to Review
19. KPIs to Review
20. Applications to Review
21. Data Integration to Review
22. Business Knowledge Training
23. IT Skills Training
24. Information Exchanging Training
25. Staff Attrition Review
26. Application Area Project Priorities

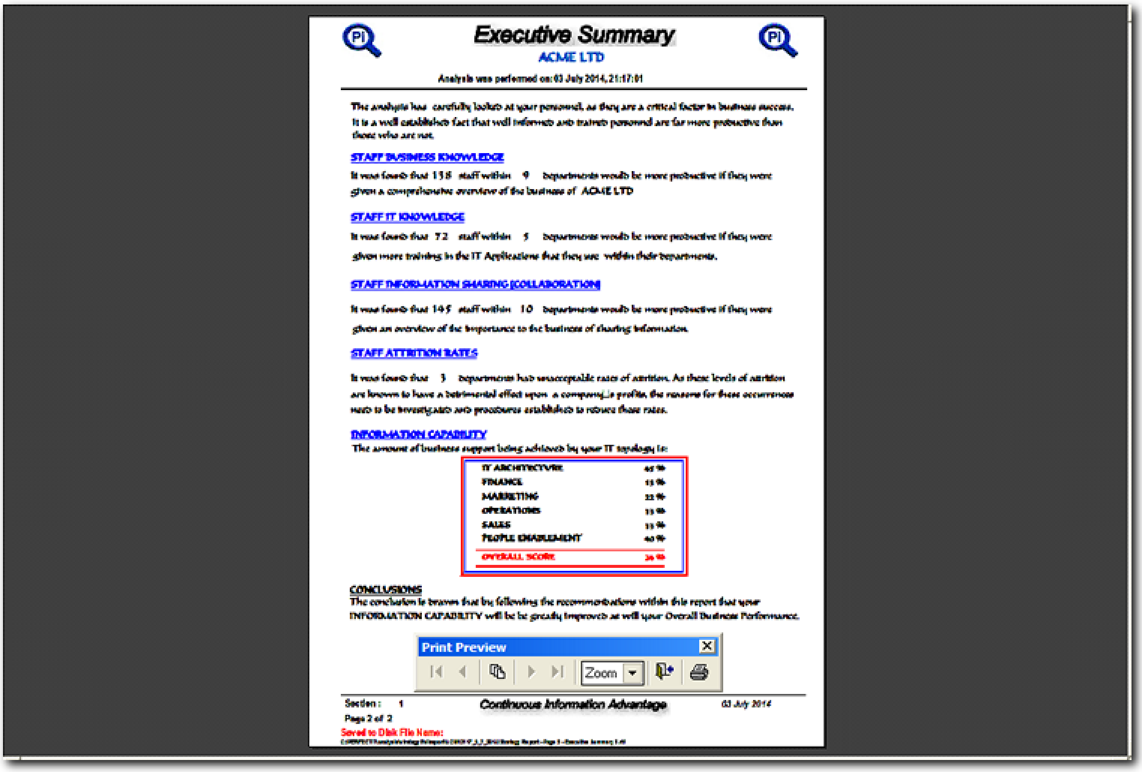
An example of the complete report is below:

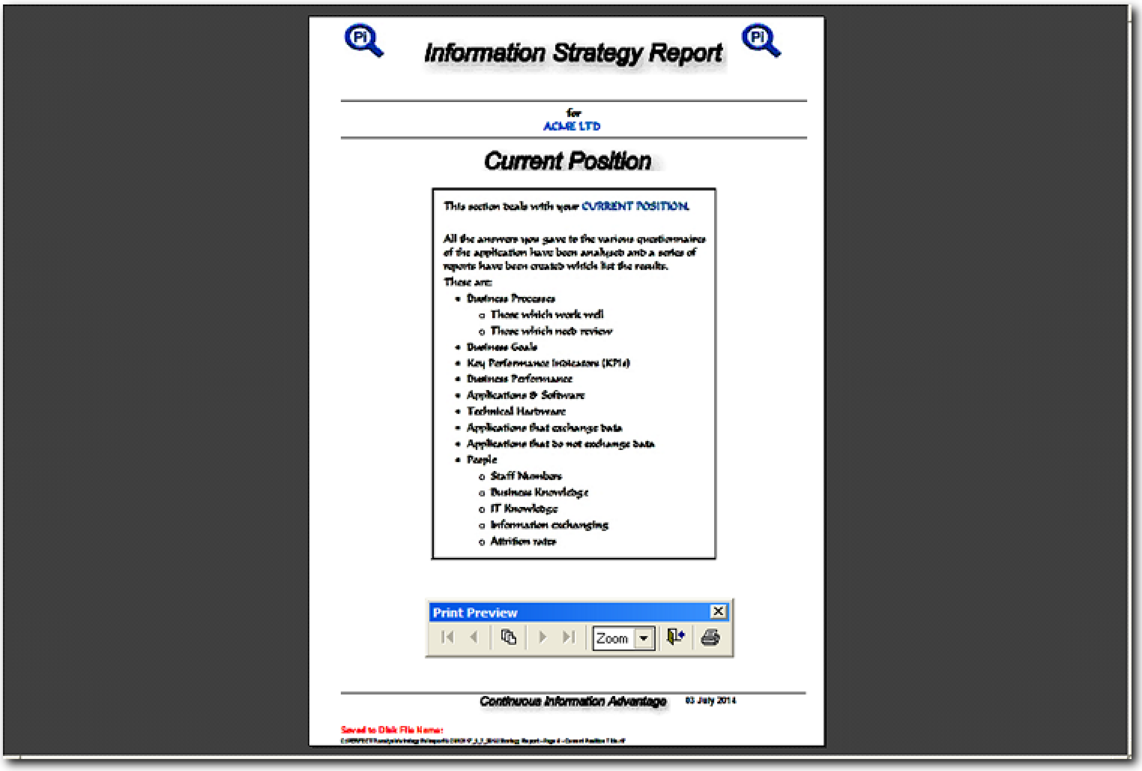

Analysis was performed on: 03 July 2014, 21:17:01
for
ACME LTD
Information Strategy Report
Print Preview
Zoom
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:

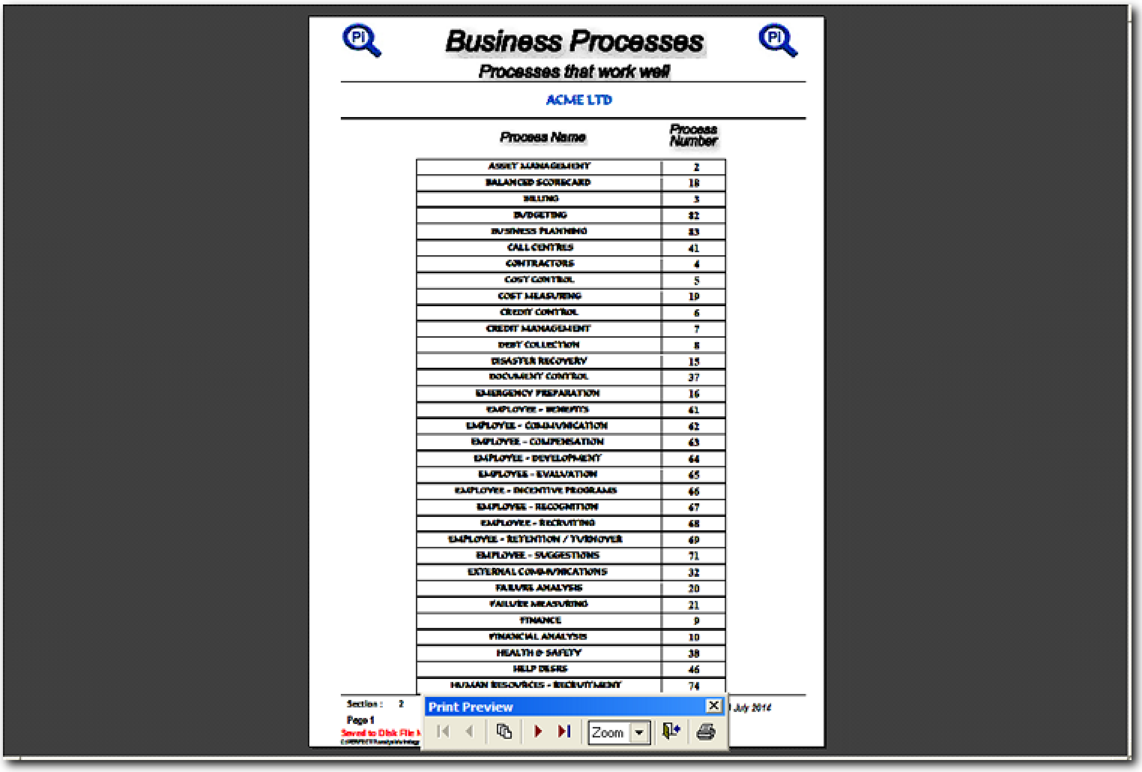

Information Strategy Report
The Analysis was run on: 03 July 2014, 21:17:01
for
ACME LTD
The following report has been created by carefully analysing the answers that you provided to the questions within each section of the application.
The report covers your:
Business Processes
Objectives, Goals and KPIs
Performance
Technology
People
The report is structured as follows:
1. Executive Summary
2. Current Position
3. Recommended Actions
It represents a true view of where you are currently (AS IS) and identifies areas that need attention to ensure that your Information Capability is optimised in order to improve your Overall Business Performance.
Print Preview
Zoom
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:


Information Strategy Report
for
ACME LTD
Executive Summary
Print Preview
Zoom
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:


Executive Summary
ACME LTD
BUSINESS PROCESSES
BUSINESS GOALS
KEY PERFORMANCE INDICATORS (KPIs)
OVERALL BUSINESS PERFORMANCE
APPLICATIONS & SOFTWARE
APPLICATION & DATA INTEGRATION
Print Preview
Zoom
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:


Executive Summary
ACME LTD
STAFF BUSINESS KNOWLEDGE
STAFF IT KNOWLEDGE
STAFF ATTRITION RATES
INFORMATION CAPABILITY
CONCLUSIONS
Print Preview
Zoom
Continuous Information Advantage


Information Strategy Report
for
ACME LTD
Current Position
This section deals with your CURRENT POSITION.
Print Preview
Zoom
Continuous Information Advantage



Business Processes
Processes that work well
ACME LTD

Process Name	Process Number
ASSET MANAGEMENT	2
BALANCED SCORECARD	18
BILLING	3
BUDGETING	82
BUSINESS PLANNING	83
CALL CENTRES	41
CONTRACTORS	4
COST CONTROL	5
COST MEASURING	19
CREDIT CONTROL	6
CREDIT MANAGEMENT	7
DEBT COLLECTION	8
DISASTER RECOVERY	15
DOCUMENT CONTROL	37
EMERGENCY PREPARATION	16
EMPLOYEE - BENEFITS	61
EMPLOYEE - COMMUNICATION	62
EMPLOYEE - COMPENSATION	63
EMPLOYEE - DEVELOPMENT	64
EMPLOYEE - EVALUATION	65
EMPLOYEE - INCENTIVE PROGRAMS	66
EMPLOYEE - RECOGNITION	67
EMPLOYEE - RECRUITING	68
EMPLOYEE - RETENTION / TURNOVER	69
EMPLOYEE - SUGGESTIONS	71
EXTERNAL COMMUNICATIONS	32
FAILURE ANALYSIS	20
FAILURE MEASURING	21
FINANCE	9
FINANCIAL ANALYSIS	10
HEALTH & SAFETY	38
HELP DESKS	46
HUMAN RESOURCES - RECRUITMENT	74

Section : 2

Page 1

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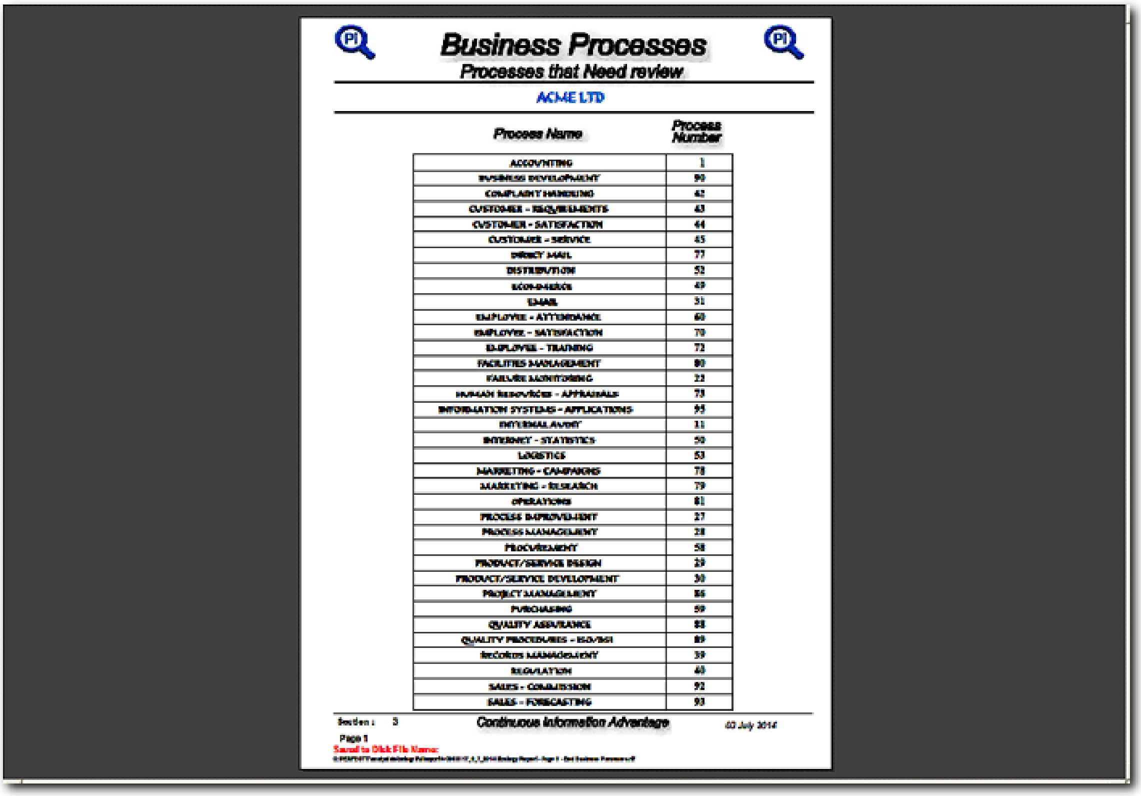
Print Preview

Zoom

July 2014



Business Processes
Processes that Need review
ACME LTD

Process Name	Process Number
ACCOUNTING	1
BUSINESS DEVELOPMENT	90
COMPLAINT HANDLING	42
CUSTOMER - REQUIREMENTS	43
CUSTOMER - SATISFACTION	44
CUSTOMER - SERVICE	45
DIRECT MAIL	77
DISTRIBUTION	52
ECOMMERCE	49
EMAIL	31
EMPLOYEE - ATTENDANCE	60
EMPLOYEE - SATISFACTION	70
EMPLOYEE - TRAINING	72
FACILITIES MANAGEMENT	80
FAILURE MONITORING	22
HUMAN RESOURCES - APPRAISALS	73
INFORMATION SYSTEMS - APPLICATIONS	95
INTERNAL AUDIT	11
INTERNET - STATISTICS	50
LOGISTICS	53
MARKETING - CAMPAIGNS	78
MARKETING - RESEARCH	79
OPERATIONS	81
PROCESS IMPROVEMENT	27
PROCESS MANAGEMENT	28
PROCUREMENT	58
PRODUCT/SERVICE DESIGN	29
PRODUCT/SERVICE DEVELOPMENT	30
PROJECT MANAGEMENT	86
PURCHASING	59
QUALITY ASSURANCE	88
QUALITY PROCEDURES - ISO/BSI	89
RECORDS MANAGEMENT	39
REGULATION	40
SALES - COMMISSION	92
SALES - FORECASTING	93

Section : 3

Continuous Information Advantage

03 July 2014

Page 1

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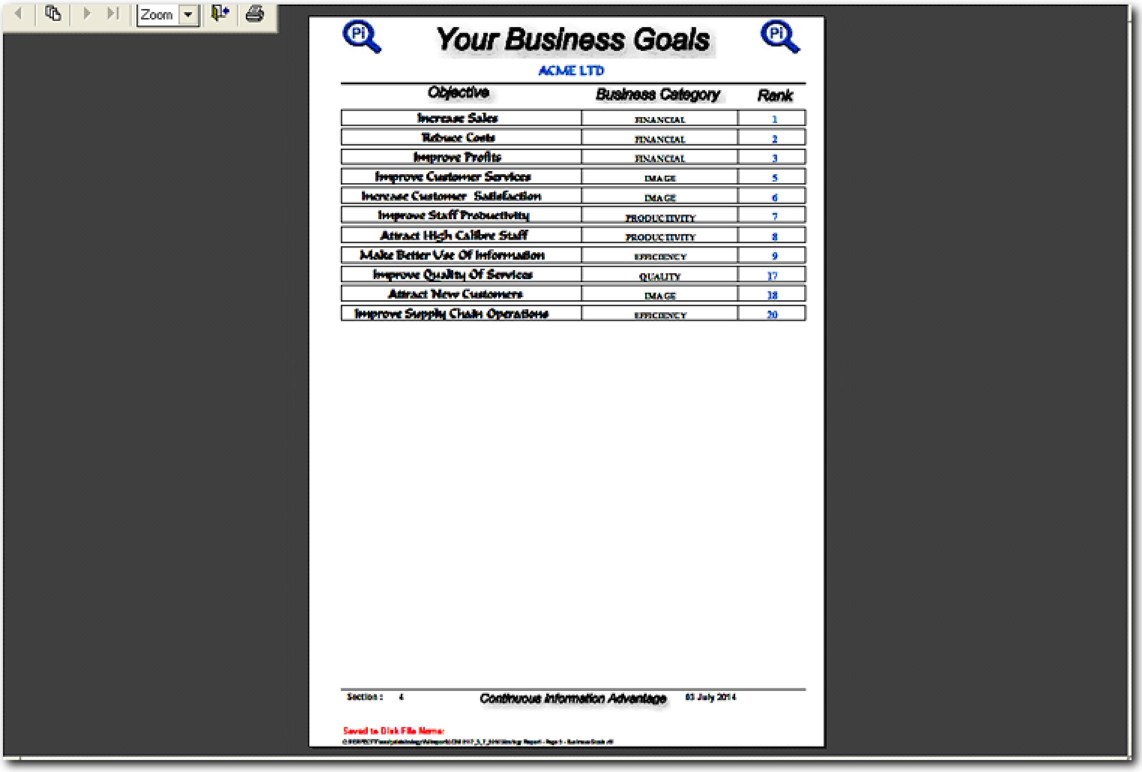

Your Business Goals

ACME LTD

Objective	Business Category	Rank
Increase Sales	FINANCIAL	1
Reduce Costs	FINANCIAL	2
Improve Profits	FINANCIAL	3
Improve Customer Services	IMAGE	5
Increase Customer Satisfaction	IMAGE	6
Improve Staff Productivity	PRODUCTIVITY	7
Attract High Calibre Staff	PRODUCTIVITY	8
Make Better Use Of Information	EFFICIENCY	9
Improve Quality Of Services	QUALITY	17
Attract New Customers	IMAGE	18
Improve Supply Chain Operations	EFFICIENCY	20

Section : 4 Continuous Information Advantage 03 July 2014

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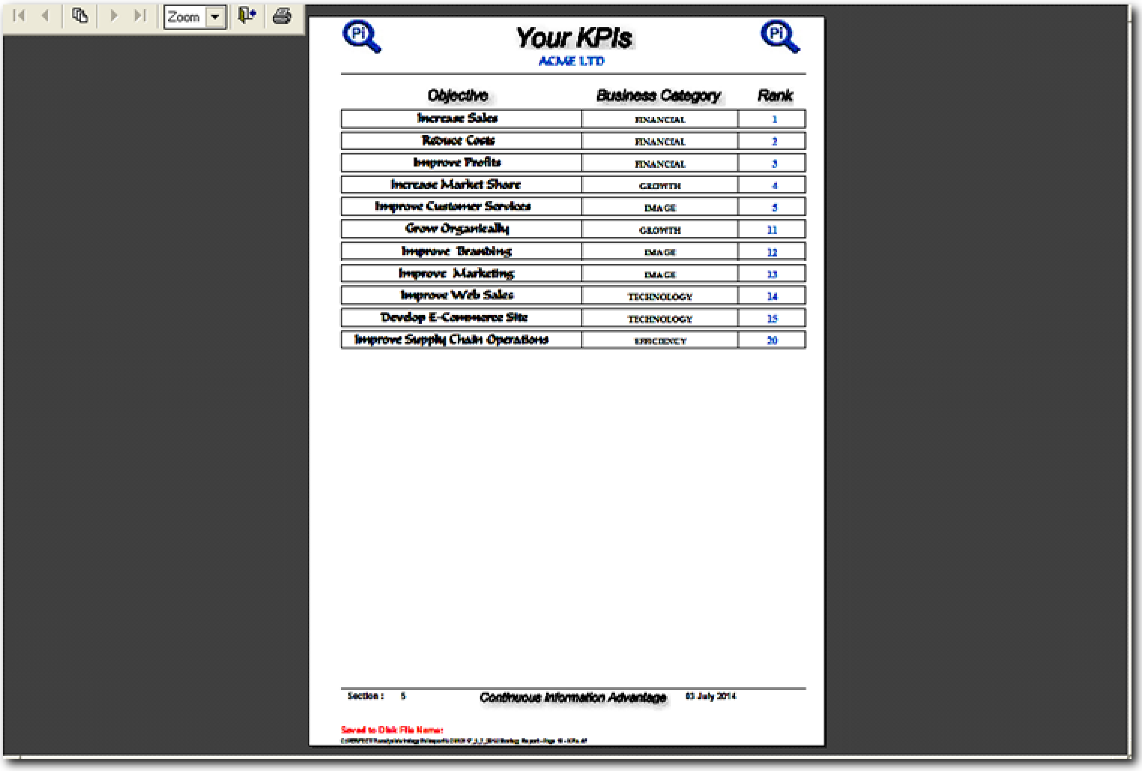

Your KPIs

ACME LTD

Objective	Business Category	Rank
Increase Sales	FINANCIAL	1
Reduce Costs	FINANCIAL	2
Improve Profits	FINANCIAL	3
Increase Market Share	GROWTH	4
Improve Customer Services	IMAGE	5
Grow Organically	GROWTH	11
Improve Branding	IMAGE	12
Improve Marketing	IMAGE	13
Improve Web Sales	TECHNOLOGY	14
Develop E-Commerce Site	TECHNOLOGY	15
Improve Supply Chain Operations	EFFICIENCY	20

Section : 5 Continuous Information Advantage 03 July 2014

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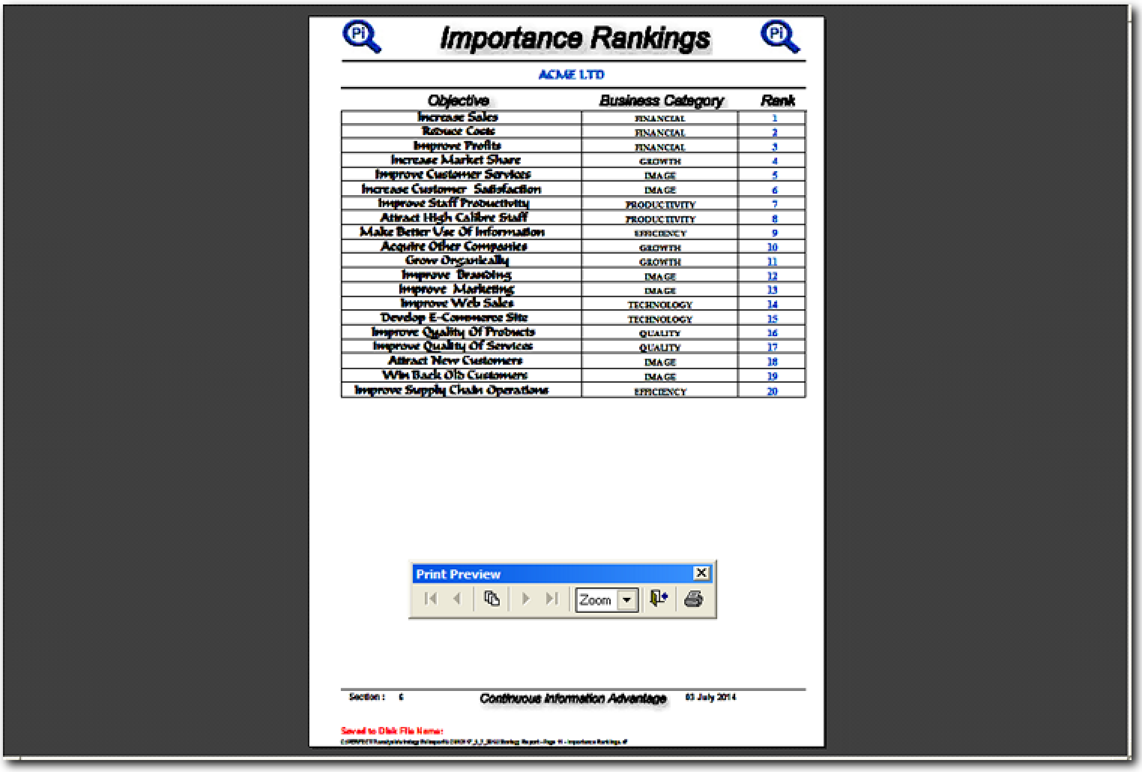
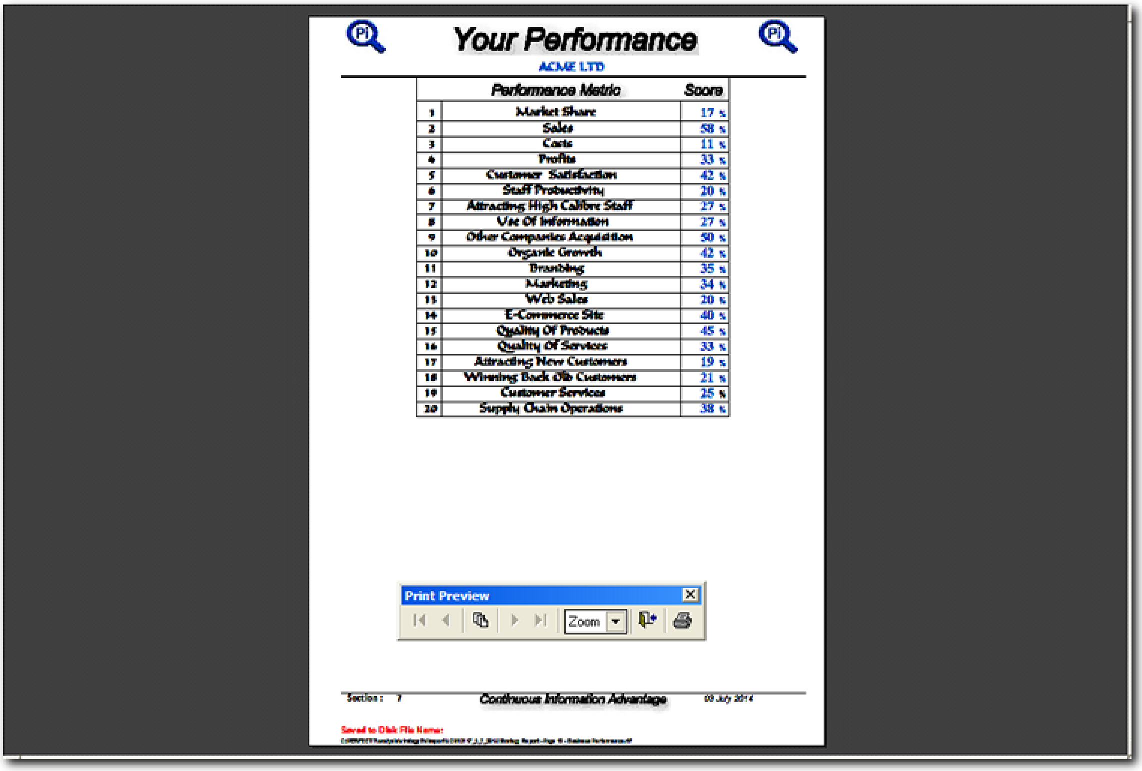
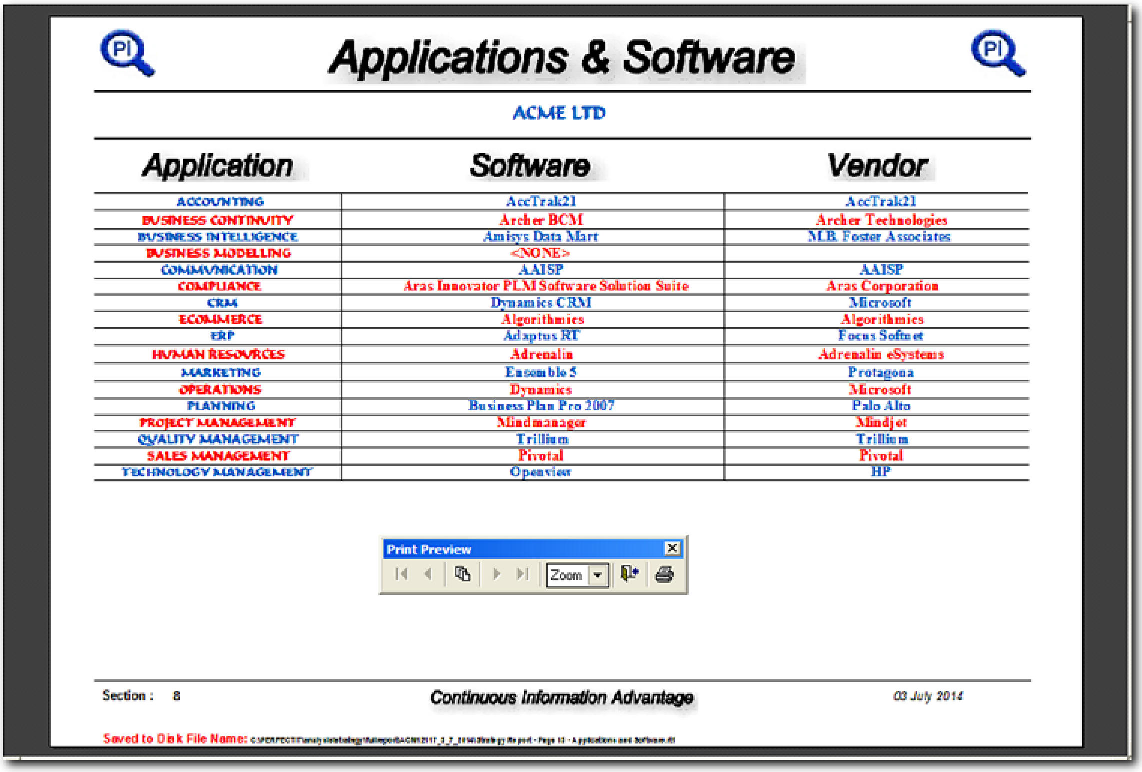


Objective	Business Category	Rank
Increase Sales	FINANCIAL	1
Reduce Costs	FINANCIAL	2
Improve Profits	FINANCIAL	3
Increase Market Share	GROWTH	4
Improve Customer Services	IMAGE	5
Increase Customer Satisfaction	IMAGE	6
Improve Staff Productivity	PRODUCTIVITY	7
Attract High Calibre Staff	PRODUCTIVITY	8
Make Better Use Of Information	EFFICIENCY	9
Acquire Other Companies	GROWTH	10
Grow Organically	GROWTH	11
Improve Branding	IMAGE	12
Improve Marketing	IMAGE	13
Improve Web Sales	TECHNOLOGY	14
Develop E-Commerce Site	TECHNOLOGY	15
Improve Quality Of Products	QUALITY	16
Improve Quality Of Services	QUALITY	17
Attract New Customers	IMAGE	18
Win Back Old Customers	IMAGE	19
Improve Supply Chain Operations	EFFICIENCY	20



	Performance Metric	Score
1	Market Share	17 %
2	Sales	58 %
3	Costs	11 %
4	Profits	33 %
5	Customer Satisfaction	42 %
6	Staff Productivity	20 %
7	Attracting High Calibre Staff	27 %
8	Use Of Information	27 %
9	Other Companies Acquisition	50 %
10	Organic Growth	42 %
11	Branding	35 %
12	Marketing	34 %
13	Web Sales	20 %
14	E-Commerce Site	40 %
15	Quality Of Products	45 %
16	Quality Of Services	33 %
17	Attracting New Customers	19 %
18	Winning Back Old Customers	21 %
19	Customer Services	25 %
20	Supply Chain Operations	38 %



Applications & Software

ACME LTD

Application	Software	Vendor
ACCOUNTING	AccTrak21	AccTrak21
BUSINESS CONTINUITY	Archer BCM	Archer Technologies
BUSINESS INTELLIGENCE	Amisys Data Mart	M.B. Foster Associates
BUSINESS MODELLING	<NONE>	
COMMUNICATION	AAISP	AAISP
COMPLIANCE	Aras Innovator PLM Software Solution Suite	Aras Corporation
CRM	Dynamics CRM	Microsoft
ECOMMERCE	Algorithmics	Algorithmics
ERP	Adaptus RT	Focus Softnet
HUMAN RESOURCES	Adrenalin	Adrenalin eSystems
MARKETING	Ensemble 5	Protagona
OPERATIONS	Dynamics	Microsoft
PLANNING	Business Plan Pro 2007	Palo Alto
PROJECT MANAGEMENT	Mindmanager	Mindjet
QUALITY MANAGEMENT	Trillium	Trillium
SALES MANAGEMENT	Pivotal	Pivotal
TECHNOLOGY MANAGEMENT	Openview	HP

Print Preview

Zoom

Section : 8 Continuous Information Advantage 03 July 2014

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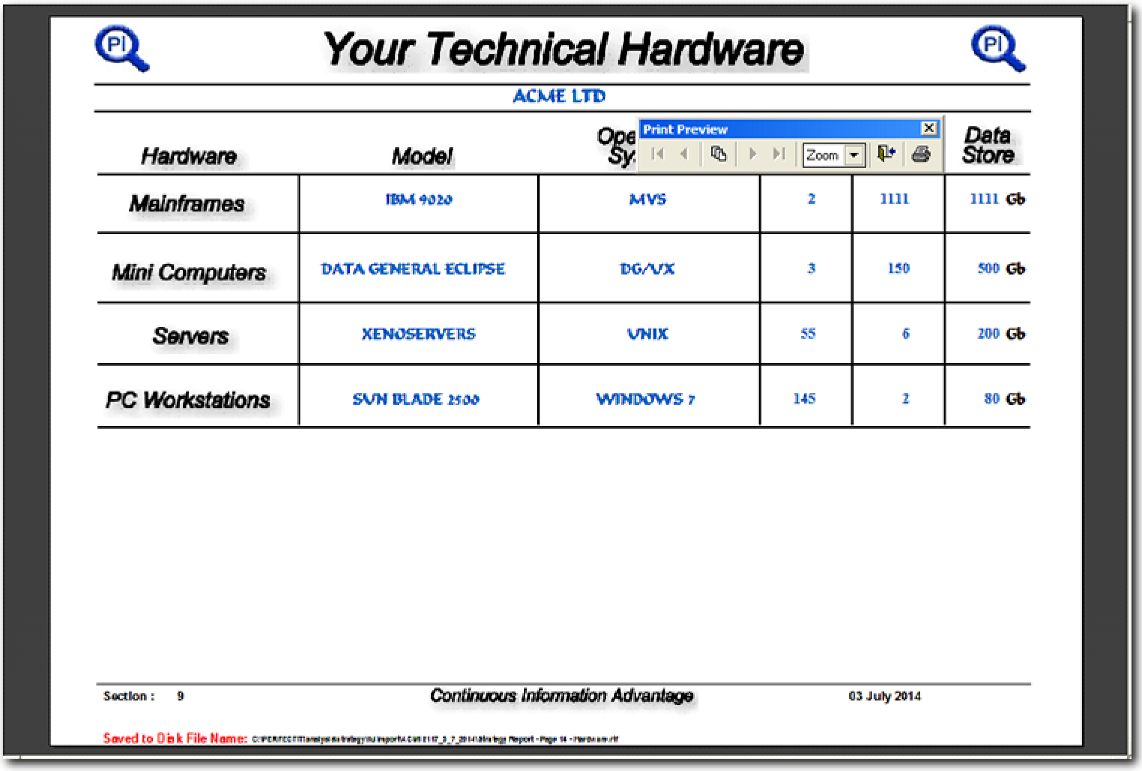

Your Technical Hardware

ACME LTD

Print Preview

Zoom

Hardware	Model	Ope Sy			Data Store
Mainframes	IBM 9020	MVS	2	1111	1111 Gb
Mini Computers	DATA GENERAL ECLIPSE	DG/UX	3	150	500 Gb
Servers	XENOSERVERS	UNIX	55	6	200 Gb
PC Workstations	SUN BLADE 2500	WINDOWS 7	145	2	80 Gb

Section : 9 Continuous Information Advantage 03 July 2014

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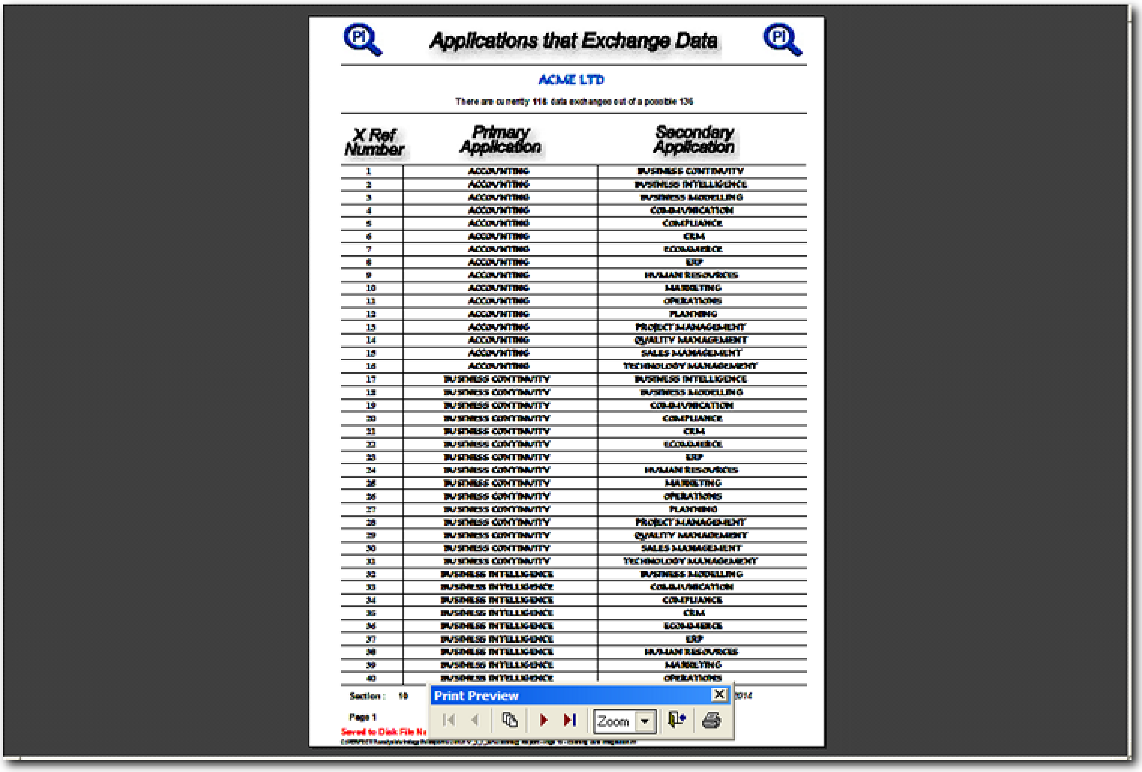

Applications that Exchange Data

ACME LTD

There are currently 116 data exchanges out of a possible 136

X Ref Number	Primary Application	Secondary Application
1	ACCOUNTING	BUSINESS CONTINUITY
2	ACCOUNTING	BUSINESS INTELLIGENCE
3	ACCOUNTING	BUSINESS MODELLING
4	ACCOUNTING	COMMUNICATION
5	ACCOUNTING	COMPLIANCE
6	ACCOUNTING	CRM
7	ACCOUNTING	ECOMMERCE
8	ACCOUNTING	ERP
9	ACCOUNTING	HUMAN RESOURCES
10	ACCOUNTING	MARKETING
11	ACCOUNTING	OPERATIONS
12	ACCOUNTING	PLANNING
13	ACCOUNTING	PROJECT MANAGEMENT
14	ACCOUNTING	QUALITY MANAGEMENT
15	ACCOUNTING	SALES MANAGEMENT
16	ACCOUNTING	TECHNOLOGY MANAGEMENT
17	BUSINESS CONTINUITY	BUSINESS INTELLIGENCE
18	BUSINESS CONTINUITY	BUSINESS MODELLING
19	BUSINESS CONTINUITY	COMMUNICATION
20	BUSINESS CONTINUITY	COMPLIANCE
21	BUSINESS CONTINUITY	CRM
22	BUSINESS CONTINUITY	ECOMMERCE
23	BUSINESS CONTINUITY	ERP
24	BUSINESS CONTINUITY	HUMAN RESOURCES
25	BUSINESS CONTINUITY	MARKETING
26	BUSINESS CONTINUITY	OPERATIONS
27	BUSINESS CONTINUITY	PLANNING
28	BUSINESS CONTINUITY	PROJECT MANAGEMENT
29	BUSINESS CONTINUITY	QUALITY MANAGEMENT
30	BUSINESS CONTINUITY	SALES MANAGEMENT
31	BUSINESS CONTINUITY	TECHNOLOGY MANAGEMENT
32	BUSINESS INTELLIGENCE	BUSINESS MODELLING
33	BUSINESS INTELLIGENCE	COMMUNICATION
34	BUSINESS INTELLIGENCE	COMPLIANCE
35	BUSINESS INTELLIGENCE	CRM
36	BUSINESS INTELLIGENCE	ECOMMERCE
37	BUSINESS INTELLIGENCE	ERP
38	BUSINESS INTELLIGENCE	HUMAN RESOURCES
39	BUSINESS INTELLIGENCE	MARKETING
40	BUSINESS INTELLIGENCE	OPERATIONS

Section : 10 2014

Page 1

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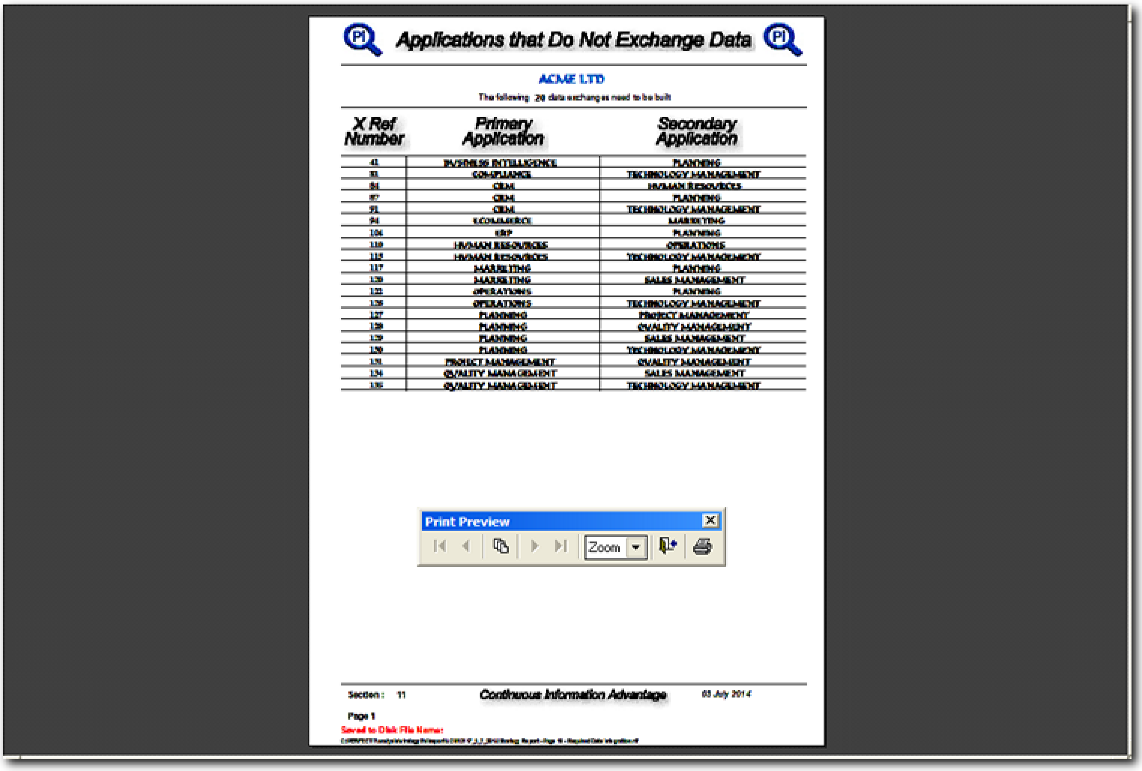

Applications that Do Not Exchange Data

ACME LTD

The following 20 data exchanges need to be built

X Ref Number	Primary Application	Secondary Application
41	BUSINESS INTELLIGENCE	PLANNING
81	COMPLIANCE	TECHNOLOGY MANAGEMENT
84	CRM	HUMAN RESOURCES
87	CRM	PLANNING
91	CRM	TECHNOLOGY MANAGEMENT
94	ECOMMERCE	MARKETING
104	ERP	PLANNING
110	HUMAN RESOURCES	OPERATIONS
115	HUMAN RESOURCES	TECHNOLOGY MANAGEMENT
117	MARKETING	PLANNING
120	MARKETING	SALES MANAGEMENT
122	OPERATIONS	PLANNING
126	OPERATIONS	TECHNOLOGY MANAGEMENT
127	PLANNING	PROJECT MANAGEMENT
128	PLANNING	QUALITY MANAGEMENT
129	PLANNING	SALES MANAGEMENT
130	PLANNING	TECHNOLOGY MANAGEMENT
131	PROJECT MANAGEMENT	QUALITY MANAGEMENT
134	QUALITY MANAGEMENT	SALES MANAGEMENT
136	QUALITY MANAGEMENT	TECHNOLOGY MANAGEMENT

Section : 11 Continuous Information Advantage 03 July 2014

Page 1

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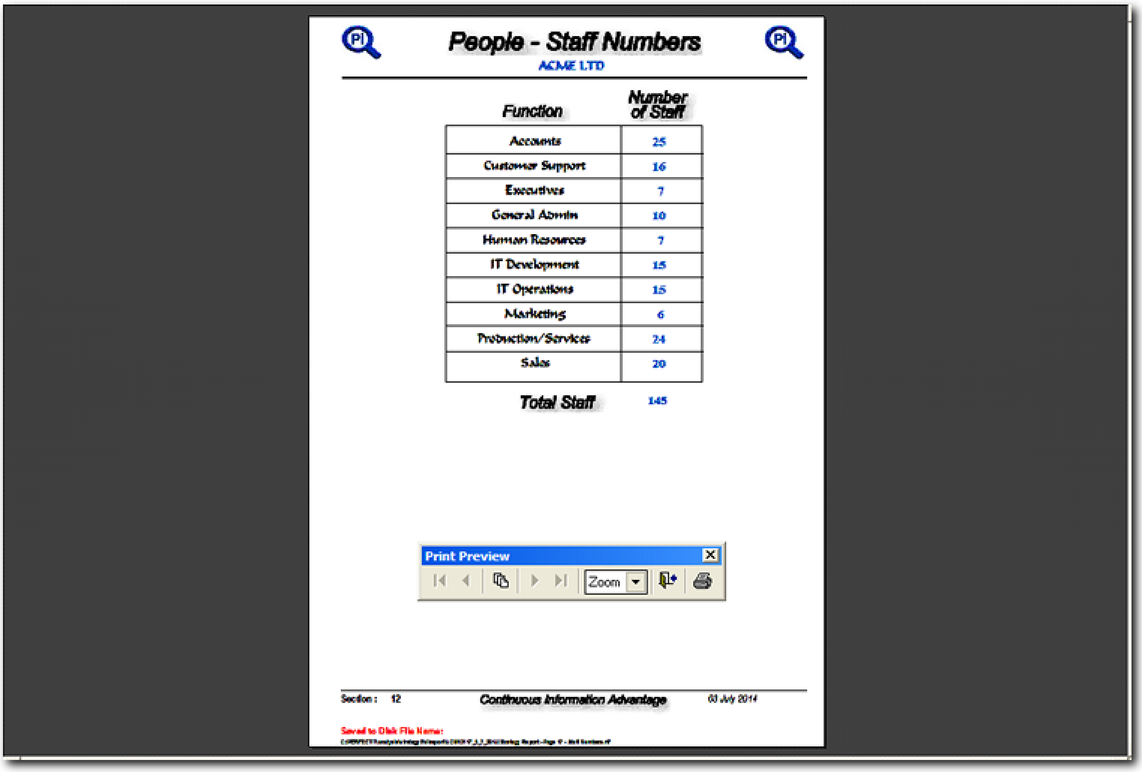
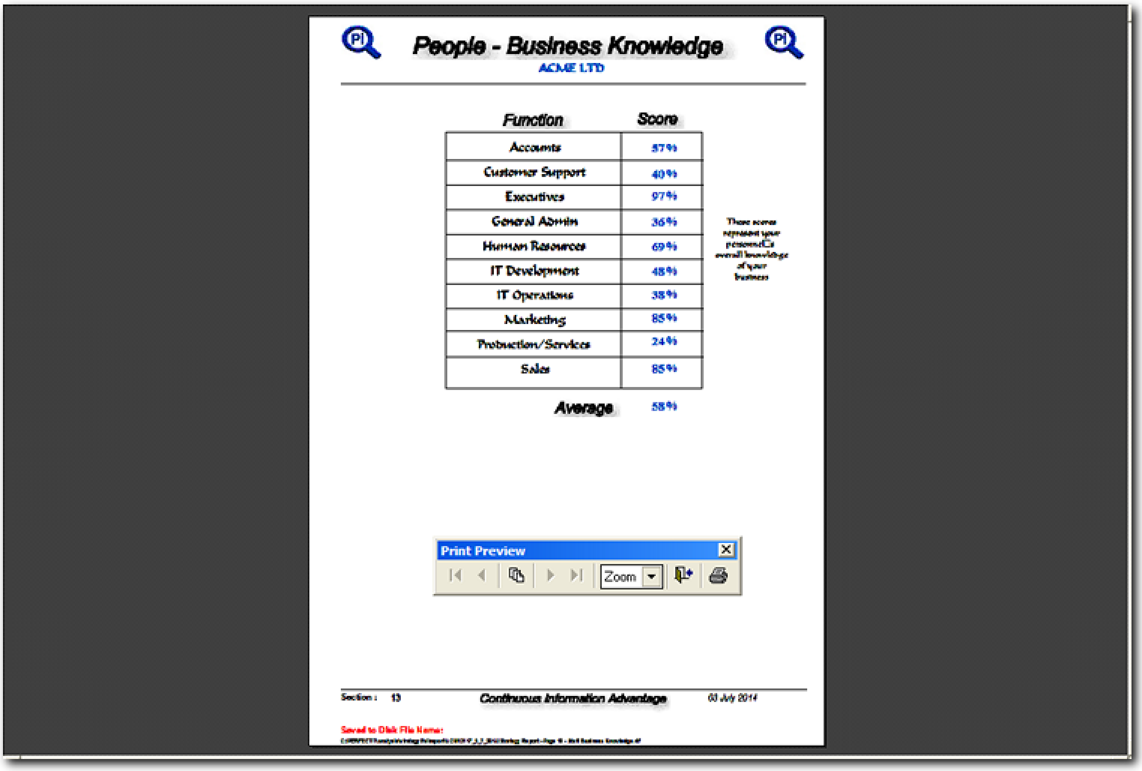
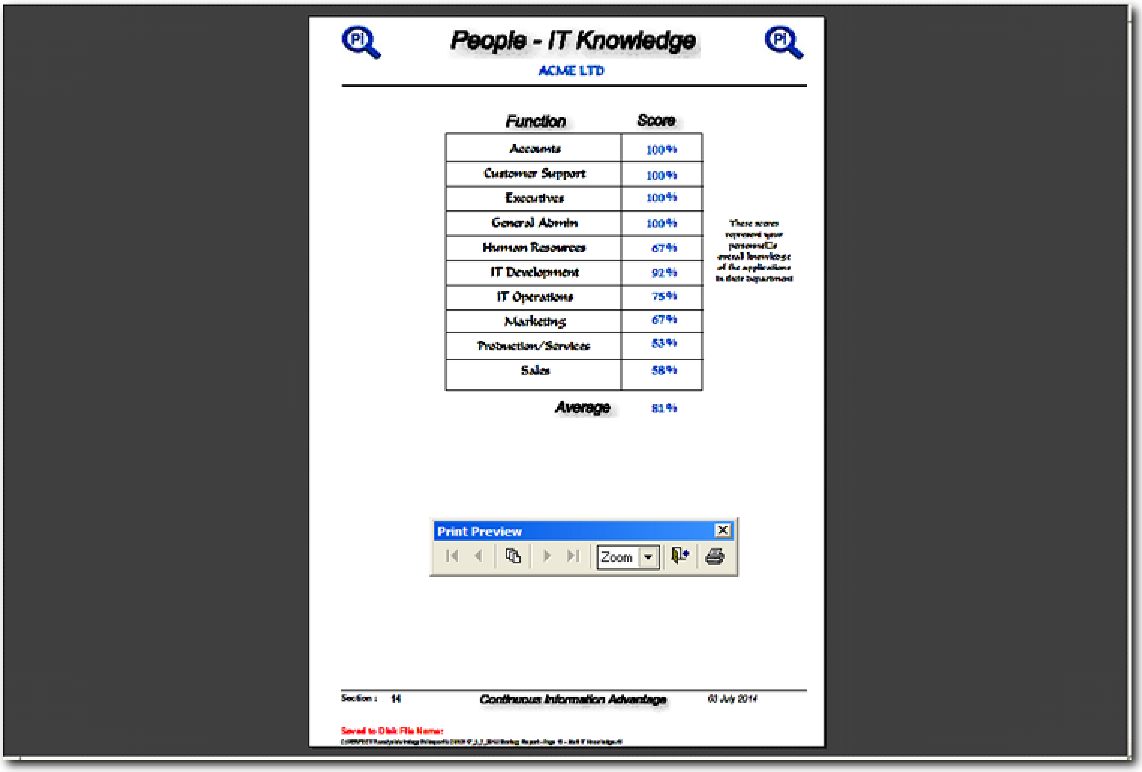
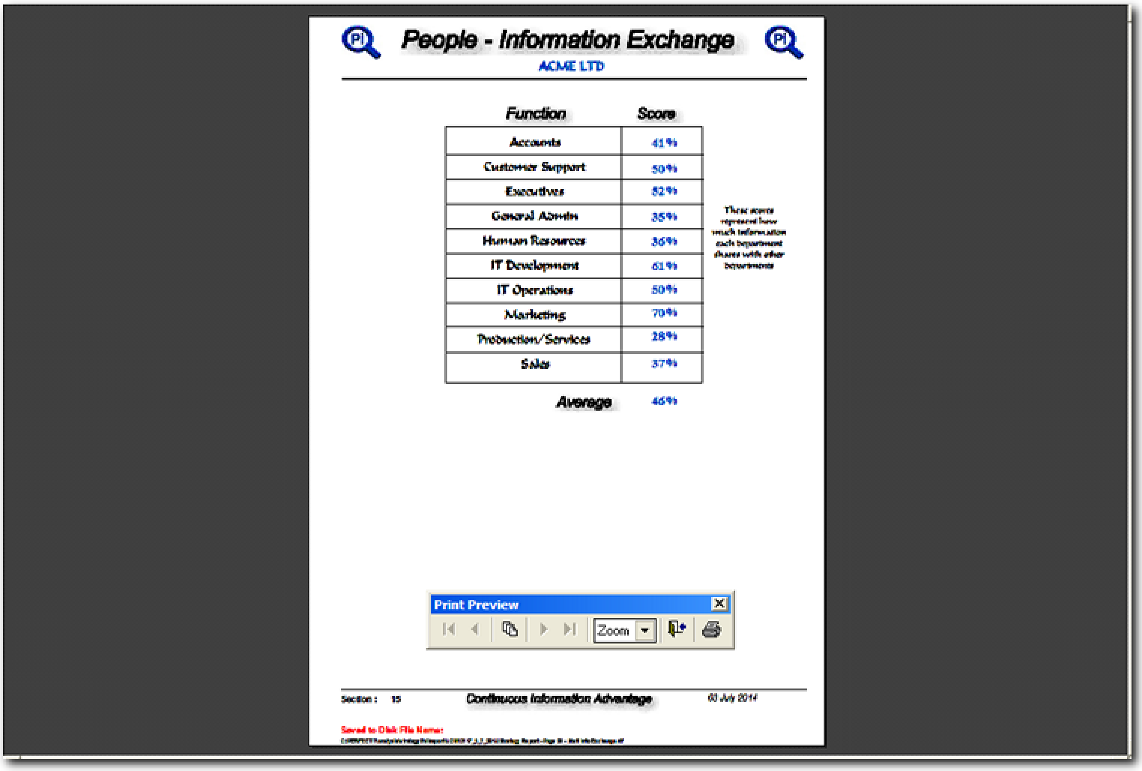
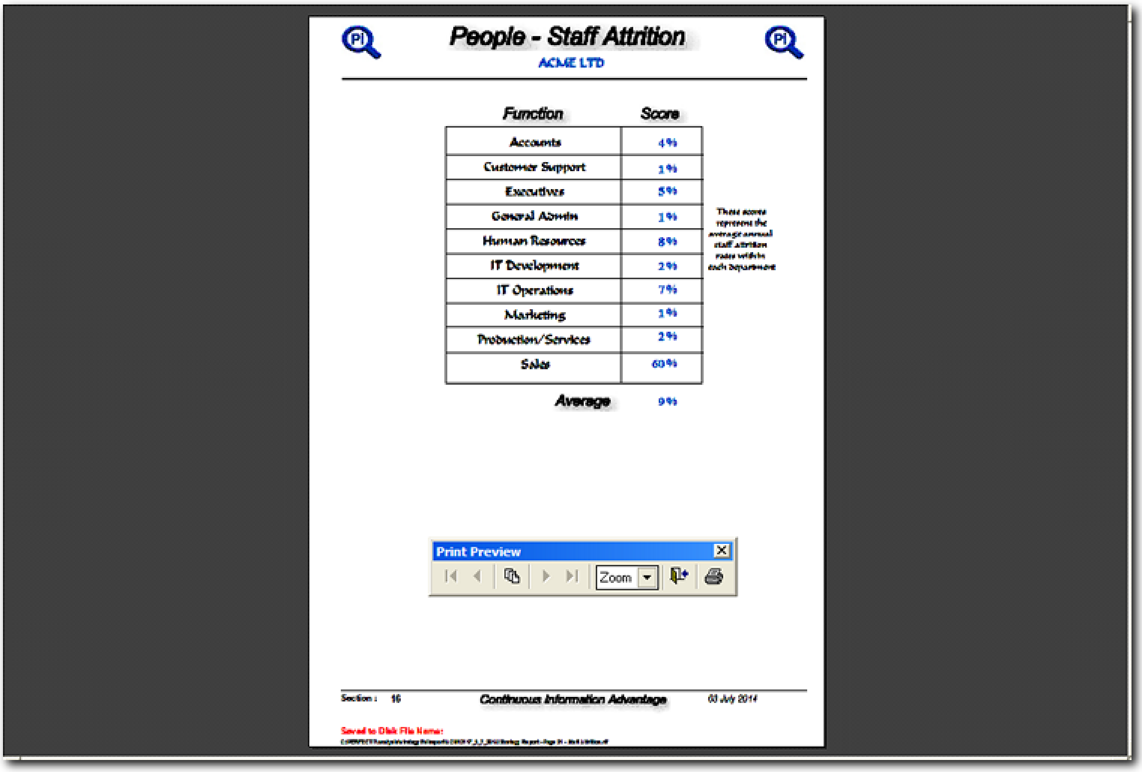
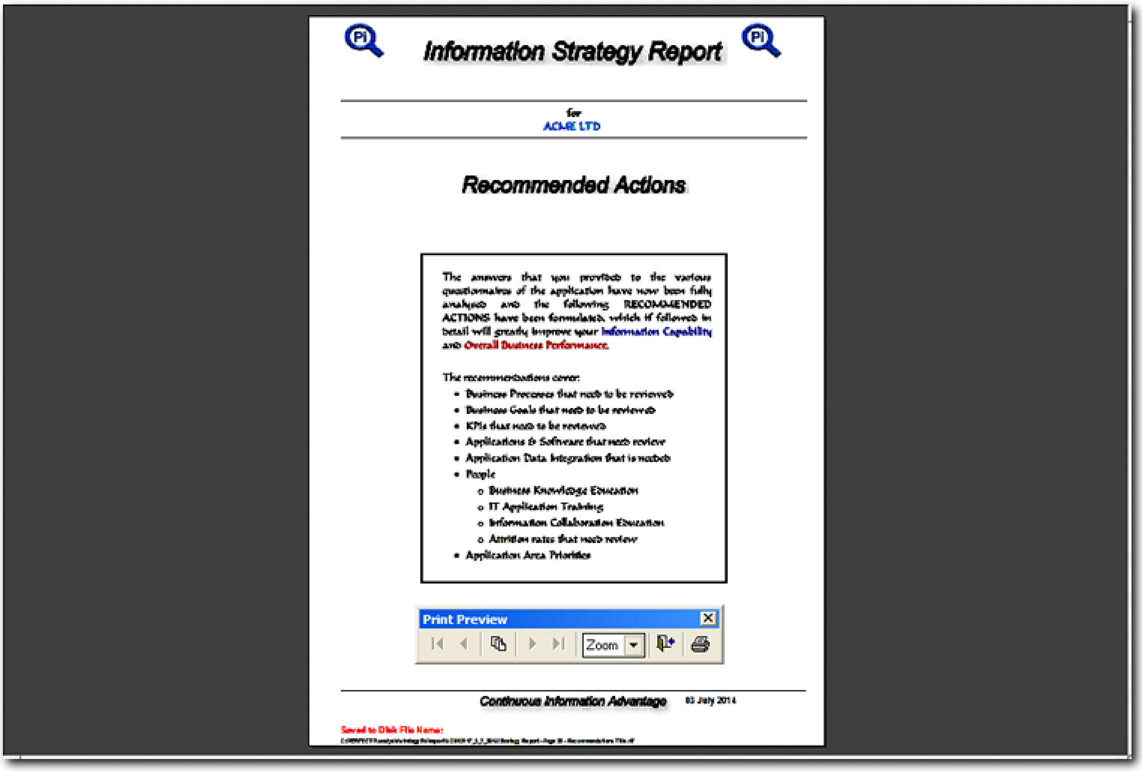

People - Staff Numbers
ACME LTD
Function
Number of Staff
Accounts 25
Customer Support 16
Executives 7
General Admin 10
Human Resources 7
IT Development 15
IT Operations 15
Marketing 6
Production/Services 24
Sales 20
Total Staff 145
Print Preview
Zoom
Section: 12
Continuous Information Advantage
Saved to Disk File Name:

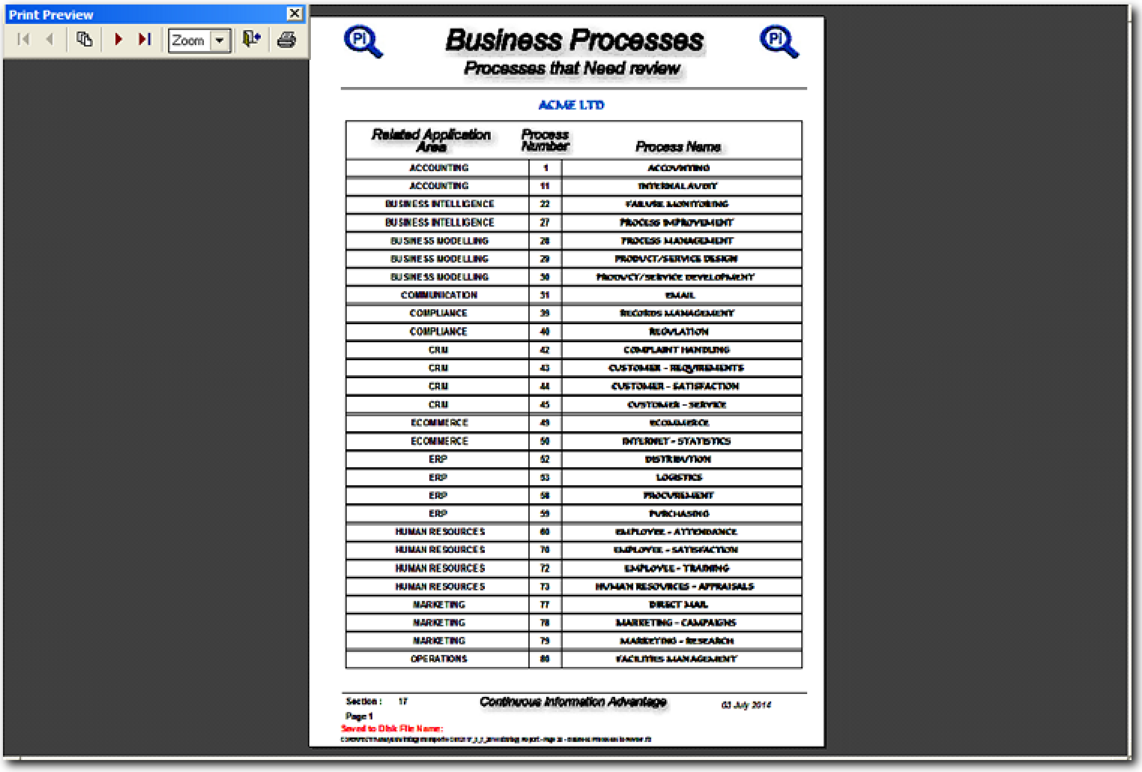

People - Business Knowledge
ACME LTD
Function
Score
Accounts 57%
Customer Support 40%
Executives 97%
General Admin 36%
Human Resources 69%
IT Development 48%
IT Operations 38%
Marketing 85%
Production/Services 24%
Sales 85%
Average 58%
Print Preview
Zoom
Section: 13
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:


People - IT Knowledge
ACME LTD
Function
Score
Accounts 100%
Customer Support 100%
Executives 100%
General Admin 100%
Human Resources 67%
IT Development 92%
IT Operations 75%
Marketing 67%
Production/Services 53%
Sales 58%
Average 81%
Print Preview
Zoom
Continuous Information Advantage


People - Information Exchange
ACME LTD
Function
Score
Accounts 41%
Customer Support 50%
Executives 52%
General Admin 35%
Human Resources 36%
IT Development 61%
IT Operations 50%
Marketing 70%
Production/Services 28%
Sales 37%
Average 46%
Print Preview
Zoom
Continuous Information Advantage


People - Staff Attrition
ACME LTD
Function | Score
Accounts | 4%
Customer Support | 1%
Executives | 5%
General Admin | 1%
Human Resources | 8%
IT Development | 2%
IT Operations | 7%
Marketing | 1%
Production/Services | 2%
Sales | 60%
Average | 9%
These scores represent the average annual staff attrition rates within each department
Print Preview
Zoom
Section: 16
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:


Information Strategy Report
for
ACME LTD
Recommended Actions
The answers that you provided to the various questionnaires of the application have now been fully analysed and the following RECOMMENDED ACTIONS have been formulated, which if followed in detail will greatly improve your Information Capability and Overall Business Performance.
The recommendations cover:
Business Processes that need to be reviewed
Business Goals that need to be reviewed
KPIs that need to be reviewed
Applications & Software that needs review
Application Data Integration that is needed
People
Business Knowledge Education
IT Application Training
Information Collaboration Education
Attrition rates that need review
Application Area Priorities
Print Preview
Zoom
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:



Print Preview

Business Processes

Processes that Need review

ACME LTD

Related Application Area	Process Number	Process Name
ACCOUNTING	1	ACCOUNTING
ACCOUNTING	11	INTERNAL AUDIT
BUSINESS INTELLIGENCE	22	FAILURE MONITORING
BUSINESS INTELLIGENCE	27	PROCESS IMPROVEMENT
BUSINESS MODELLING	28	PROCESS MANAGEMENT
BUSINESS MODELLING	29	PRODUCT/SERVICE DESIGN
BUSINESS MODELLING	30	PRODUCT/SERVICE DEVELOPMENT
COMMUNICATION	31	EMAIL
COMPLIANCE	39	RECORDS MANAGEMENT
COMPLIANCE	40	REGULATION
CRM	42	COMPLAINT HANDLING
CRM	43	CUSTOMER - REQUIREMENTS
CRM	44	CUSTOMER - SATISFACTION
CRM	45	CUSTOMER - SERVICE
ECOMMERCE	49	ECOMMERCE
ECOMMERCE	50	INTERNET - STATISTICS
ERP	52	DISTRIBUTION
ERP	53	LOGISTICS
ERP	58	PROCUREMENT
ERP	59	PURCHASING
HUMAN RESOURCES	60	EMPLOYEE - ATTENDANCE
HUMAN RESOURCES	70	EMPLOYEE - SATISFACTION
HUMAN RESOURCES	72	EMPLOYEE - TRAINING
HUMAN RESOURCES	73	HUMAN RESOURCES - APPRAISALS
MARKETING	77	DIRECT MAIL
MARKETING	78	MARKETING - CAMPAIGNS
MARKETING	79	MARKETING - RESEARCH
OPERATIONS	80	FACILITIES MANAGEMENT

Section : 17 Continuous Information Advantage 03 July 2014

Page 1

Saved to Disk File Name:

Your Business Goals

Goals that need to be reviewed

ACME LTD

The following are GOALS that are under-achieving on performance (ACTUAL SCORE) and needs review

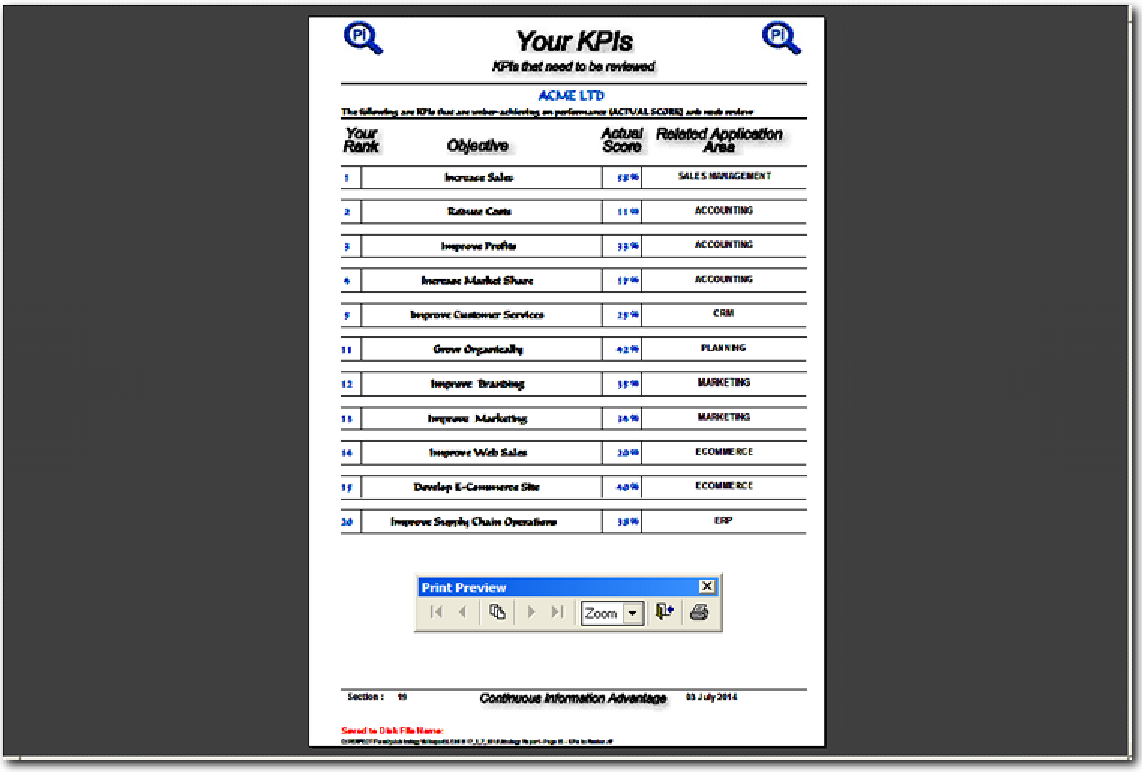
Your Rank	Objective	Actual Score	Related Application Area
1	Increase Sales	58 %	SALES MANAGEMENT
2	Reduce Costs	11 %	ACCOUNTING
3	Improve Profits	33 %	ACCOUNTING
5	Improve Customer Services	25 %	CRM
6	Increase Customer Satisfaction	42 %	CRM
7	Improve Staff Productivity	20 %	HUMAN RESOURCES
8	Attract High Calibre Staff	27 %	HUMAN RESOURCES
9	Make Better Use Of Information	27 %	BUSINESS INTELLIGENCE
17	Improve Quality Of Services	33 %	QUALITY MANAGEMENT
18	Attract New Customers	19 %	CRM
20	Improve Supply Chain Operations	38 %	ERP

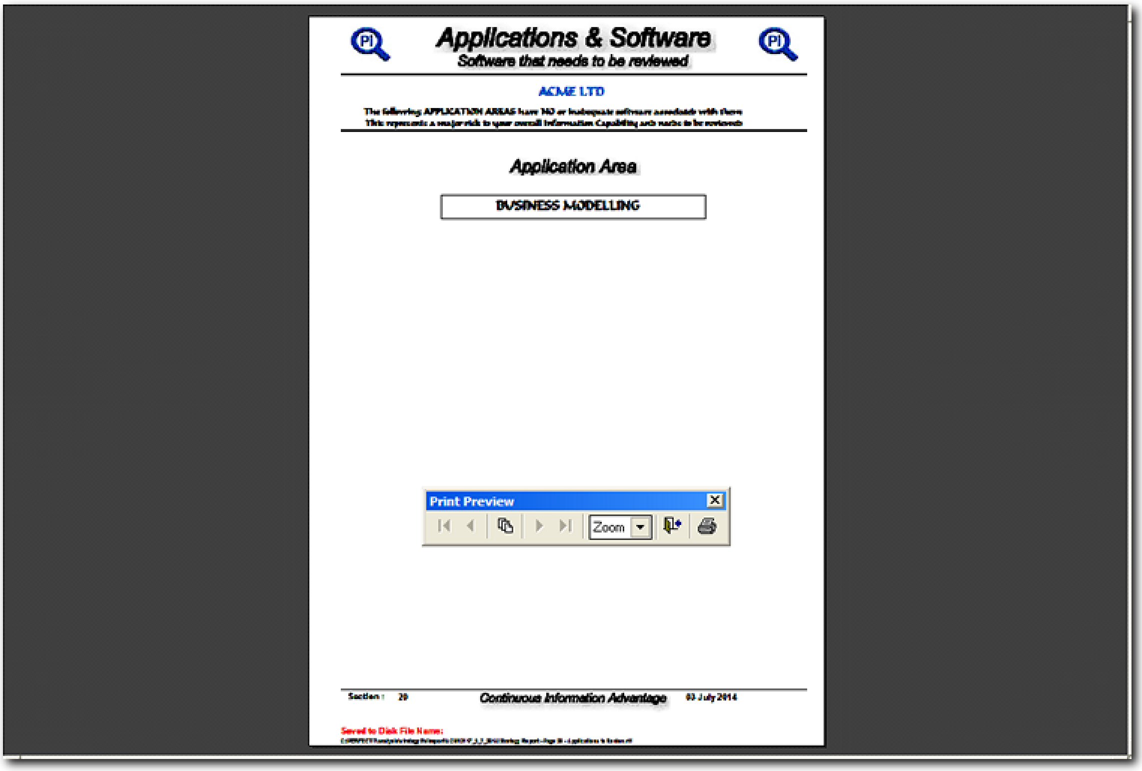
Print Preview

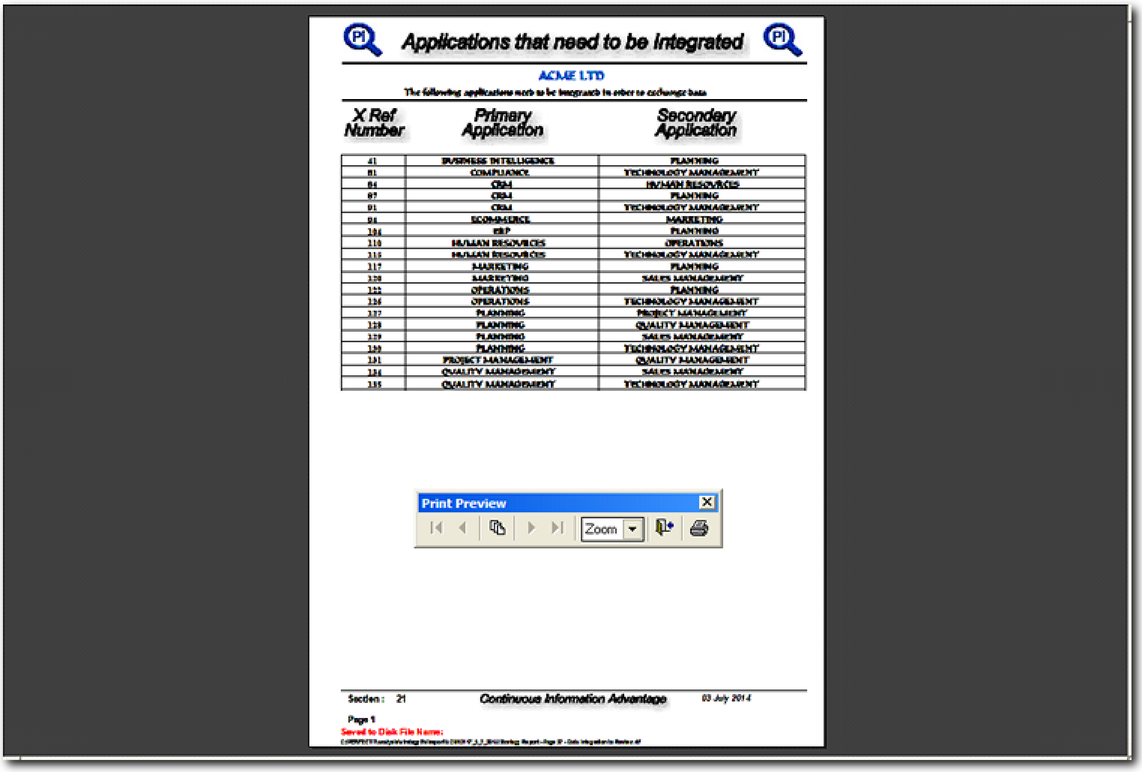
Zoom

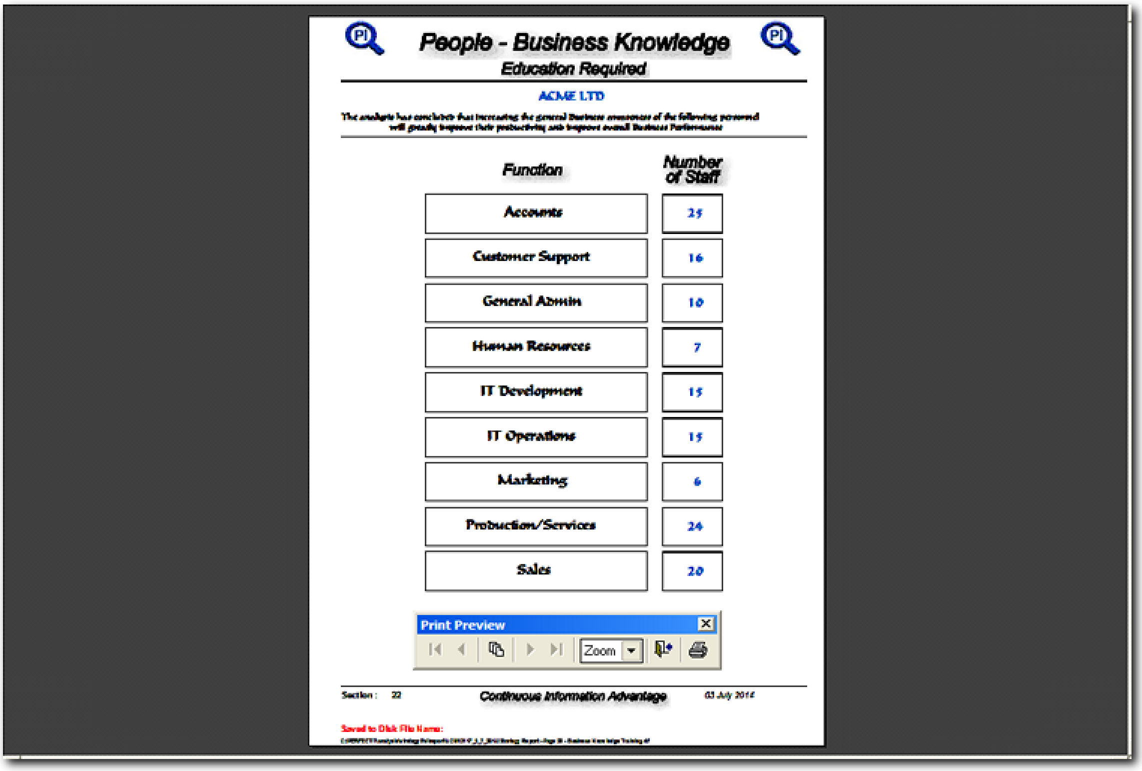
Section : 18 Continuous Information Advantage 03 July 2014

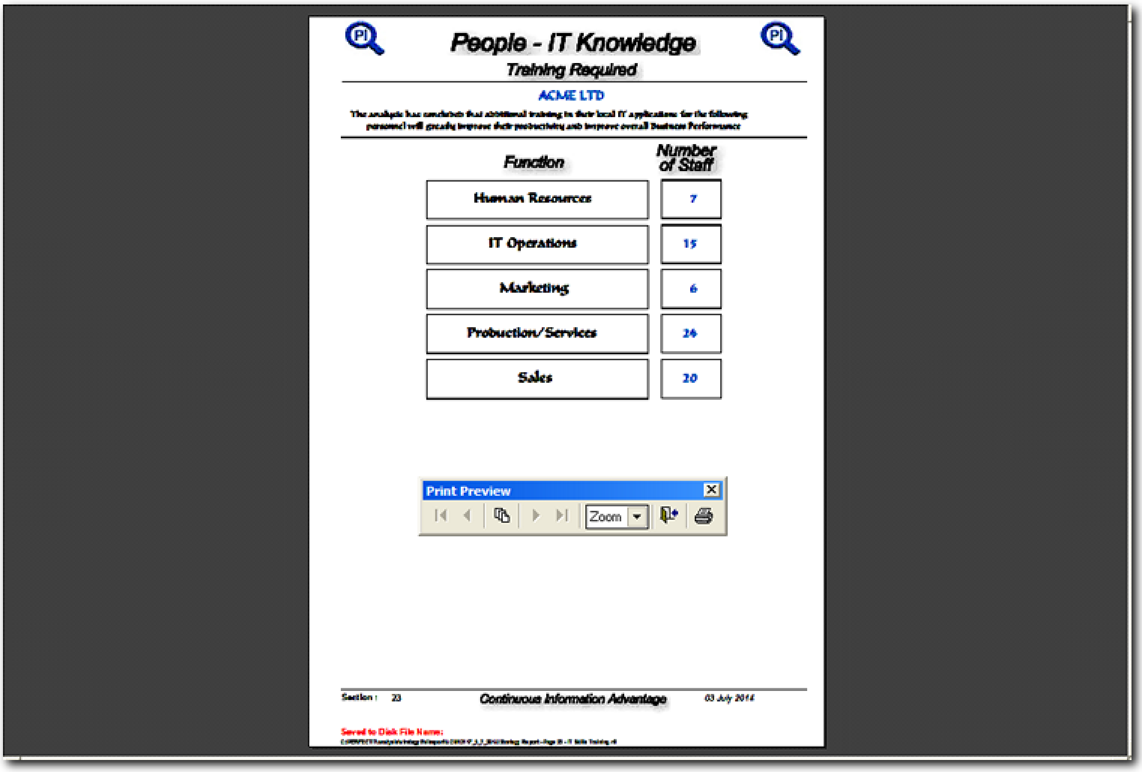
Saved to Disk File Name:

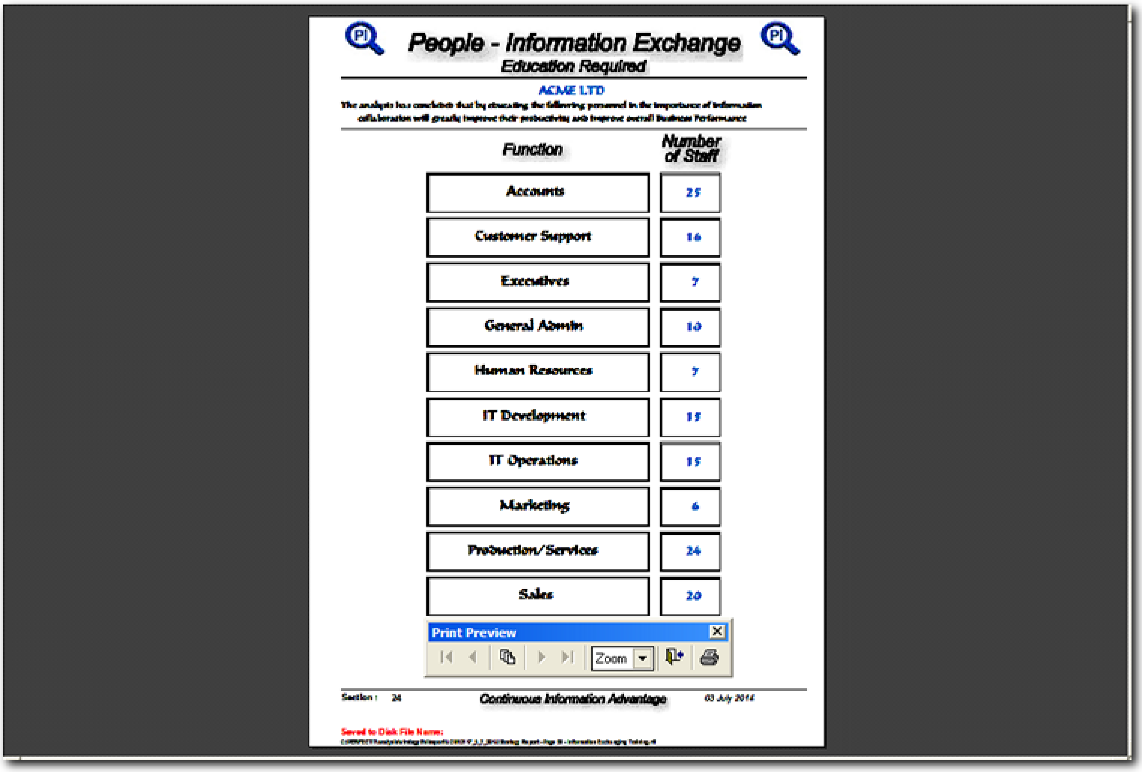

Your KPIs
KPIs that need to be reviewed
ACME LTD
Your Rank
Objective
Actual Score
Related Application Area
Increase Sales
SALES MANAGEMENT
Reduce Costs
ACCOUNTING
Improve Profits
ACCOUNTING
Increase Market Share
ACCOUNTING
Improve Customer Services
CRM
Grow Organically
PLANNING
Improve Branding
MARKETING
Improve Marketing
MARKETING
Improve Web Sales
ECOMMERCE
Develop E-Commerce Site
ECOMMERCE
Improve Supply Chain Operations
ERP
Print Preview
Zoom
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:

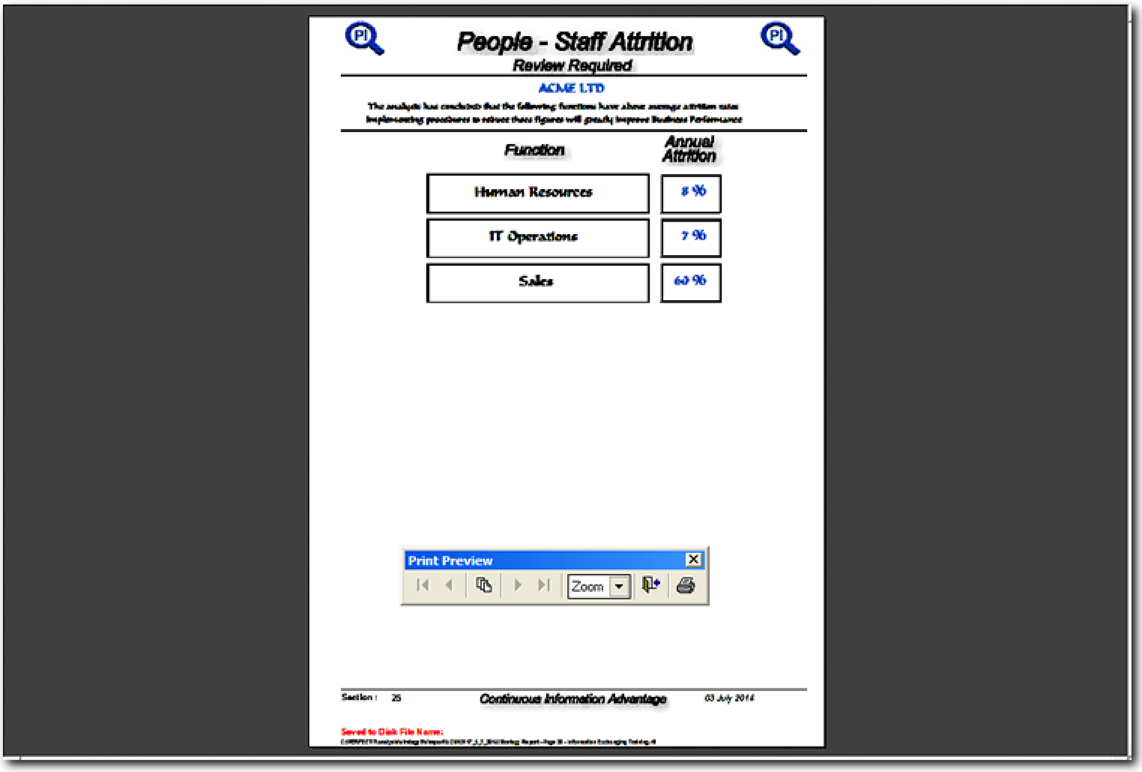

Applications & Software
Software that needs to be reviewed
ACME LTD
Application Area
BUSINESS MODELLING
Print Preview
Zoom
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:

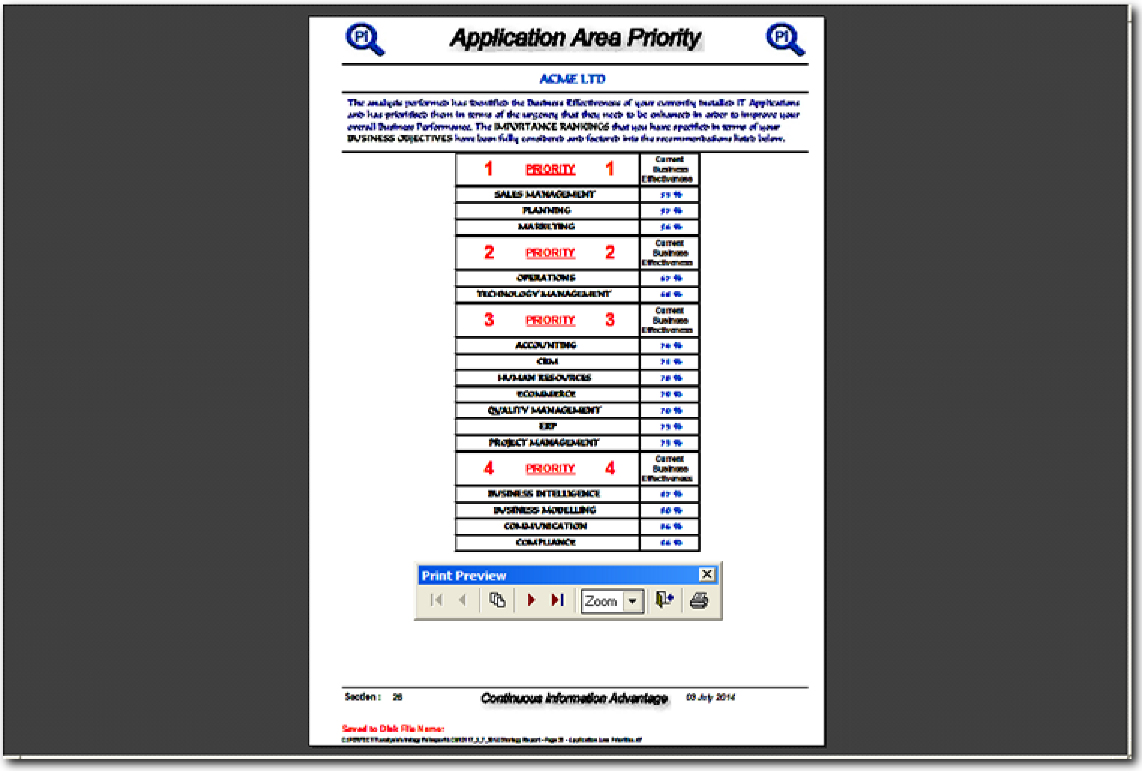

Applications that need to be integrated
ACME LTD
X Ref Number
Primary Application
Secondery Application
Print Preview
Zoom
Continuous Information Advantage
Saved to Disk File Name:

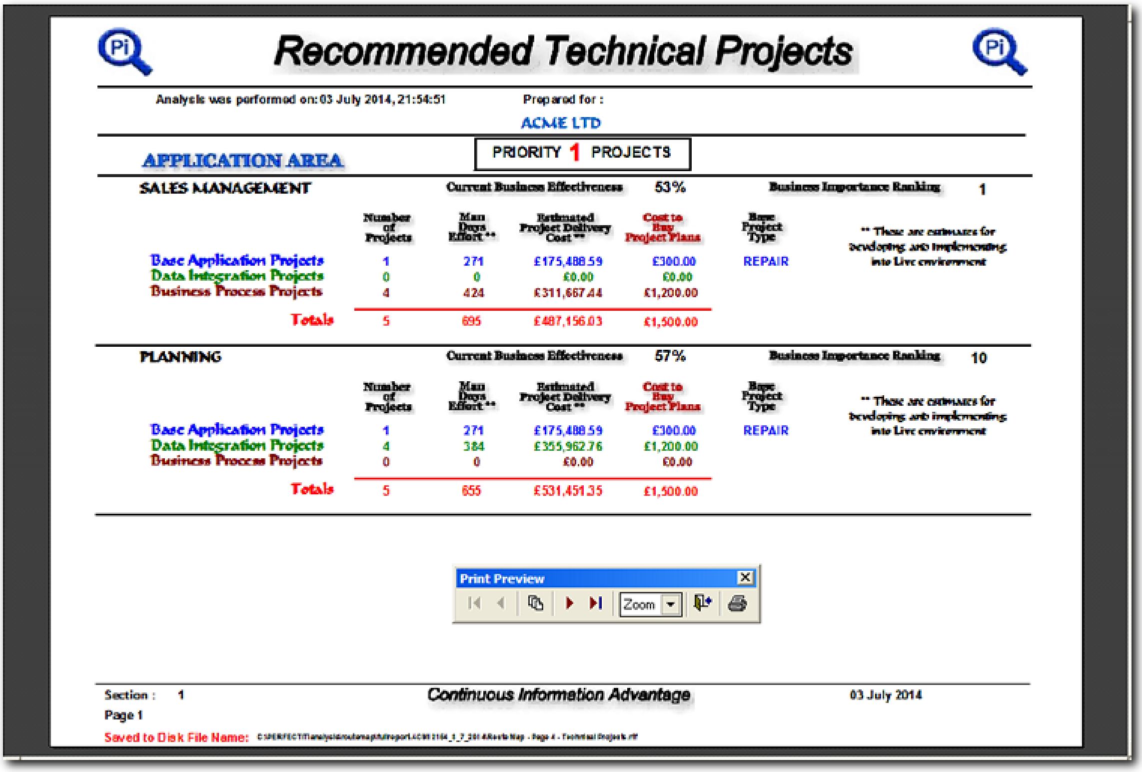

People - Business Knowledge
Education Required
ACME LTD
Function
Number of Staff
Accounts
25
Customer Support
16
General Admin
10
Human Resources
7
IT Development
15
IT Operations
15
Marketing
6
Production/Services
24
Sales
20
Print Preview
Zoom
Continuous Information Advantage
Saved to Disk File Name:


People - IT Knowledge
Training Required
ACME LTD
Function
Number of Staff
Human Resources
7
IT Operations
15
Marketing
6
Production/Services
24
Sales
20
Print Preview
Zoom
Section : 23
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:

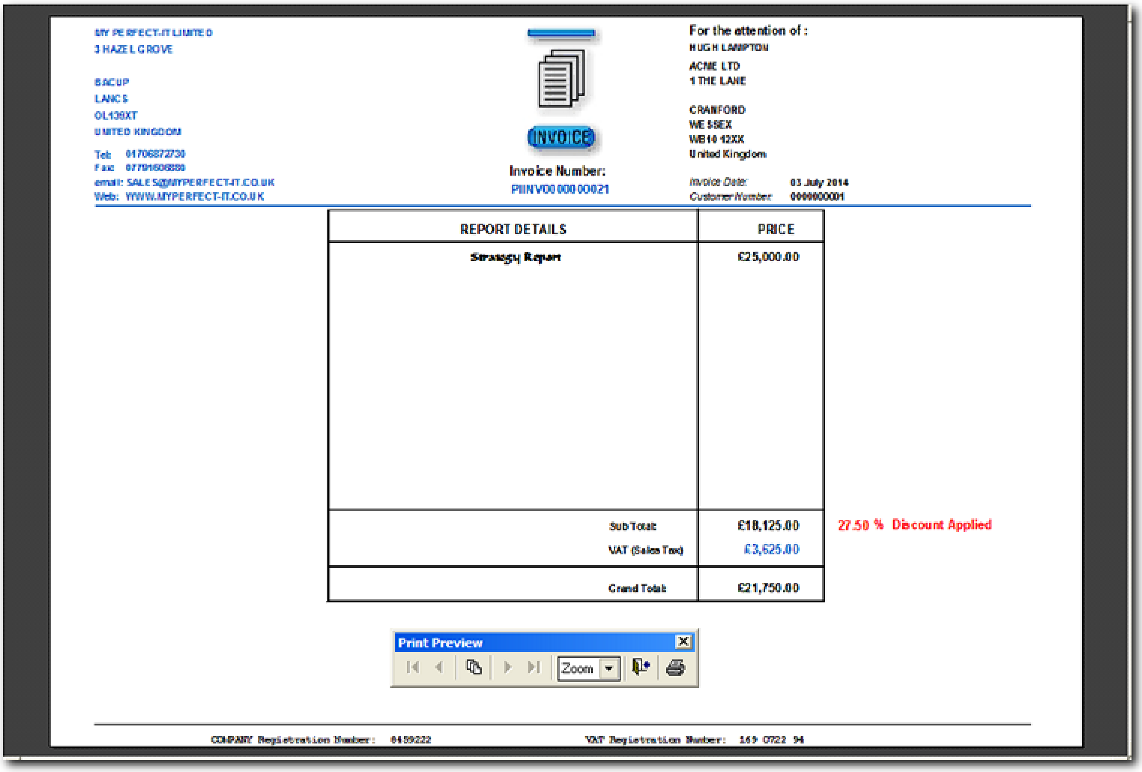

People - Information Exchange
Education Required
ACME LTD
Function
Number of Staff
Accounts
25
Customer Support
16
Executives
7
General Admin
10
Human Resources
7
IT Development
15
IT Operations
15
Marketing
6
Production/Services
24
Sales
20
Print Preview
Zoom
Section : 24
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:


People - Staff Attrition
Review Required
ACME LTD
Function
Annual Attrition
Human Resources
8 %
IT Operations
7 %
Sales
60 %
Print Preview
Zoom
Section : 25
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:


Application Area Priority
ACME LTD
1 PRIORITY 1
Current Business Effectiveness
SALES MANAGEMENT
PLANNING
MARKETING
2 PRIORITY 2
OPERATIONS
TECHNOLOGY MANAGEMENT
3 PRIORITY 3
ACCOUNTING
CRM
HUMAN RESOURCES
ECOMMERCE
QUALITY MANAGEMENT
ERP
PROJECT MANAGEMENT
4 PRIORITY 4
BUSINESS INTELLIGENCE
BUSINESS MODELLING
COMMUNICATION
COMPLIANCE
Print Preview
Zoom
Section : 26
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:



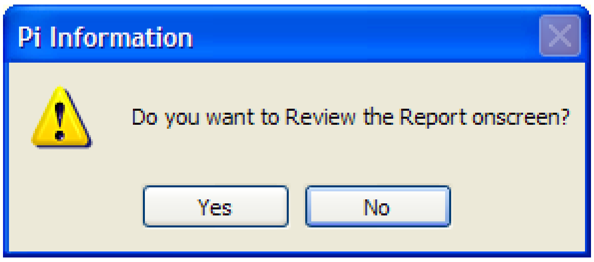
If using the Multi Company version an invoice will be displayed and saved to disk at the completion of the report:



2.31 Information Route Map Report

Note* Before Running this report you should use the Run Analysis function. Also see Sequence to use when running Reports

On selection of this option from the main menu, Pi will produce the complete Information Route Map Report.



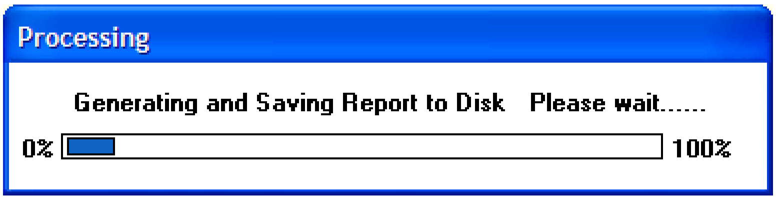
The report consists of 3 sections:

The first section is a Summary of Recommended Technical Projects.

The second section is a Departmental Breakdown of Recommended Staff Training by Course.

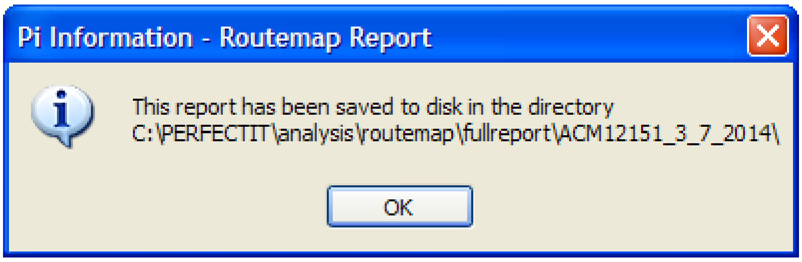
The third section provides an Estimate of the Costs for the Recommended Training by Department and in Total.

*A dialogue box allows you to choose to review the report onscreen. If you decide not to review the report onscreen a progress bar will appear whilst the report is written to disk.

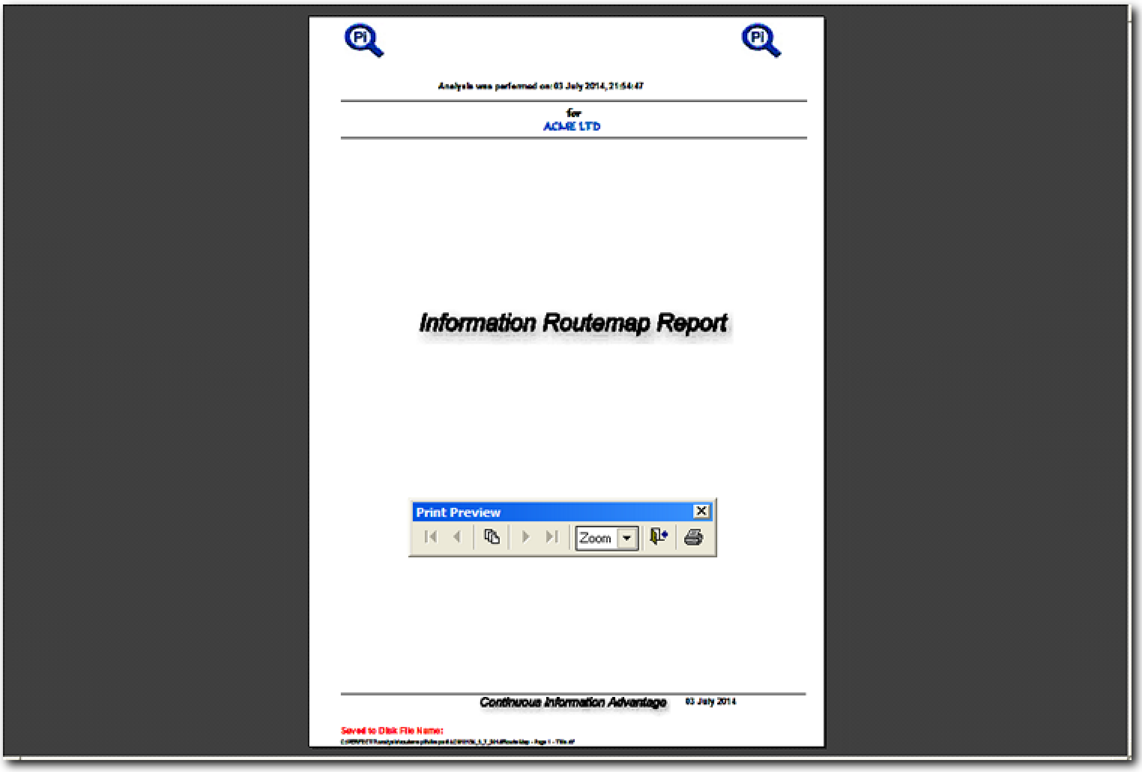


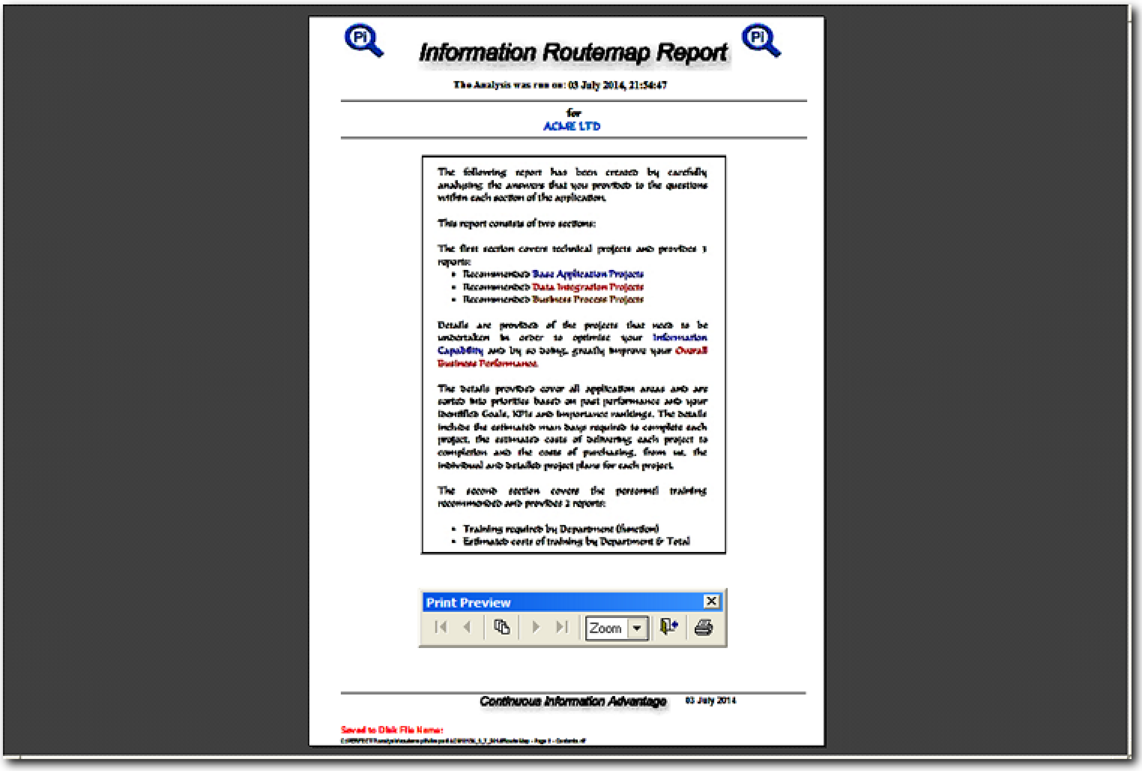
*The report is both displayed on screen from where the individual report pages can be printed and is also saved to disk in word processing format.

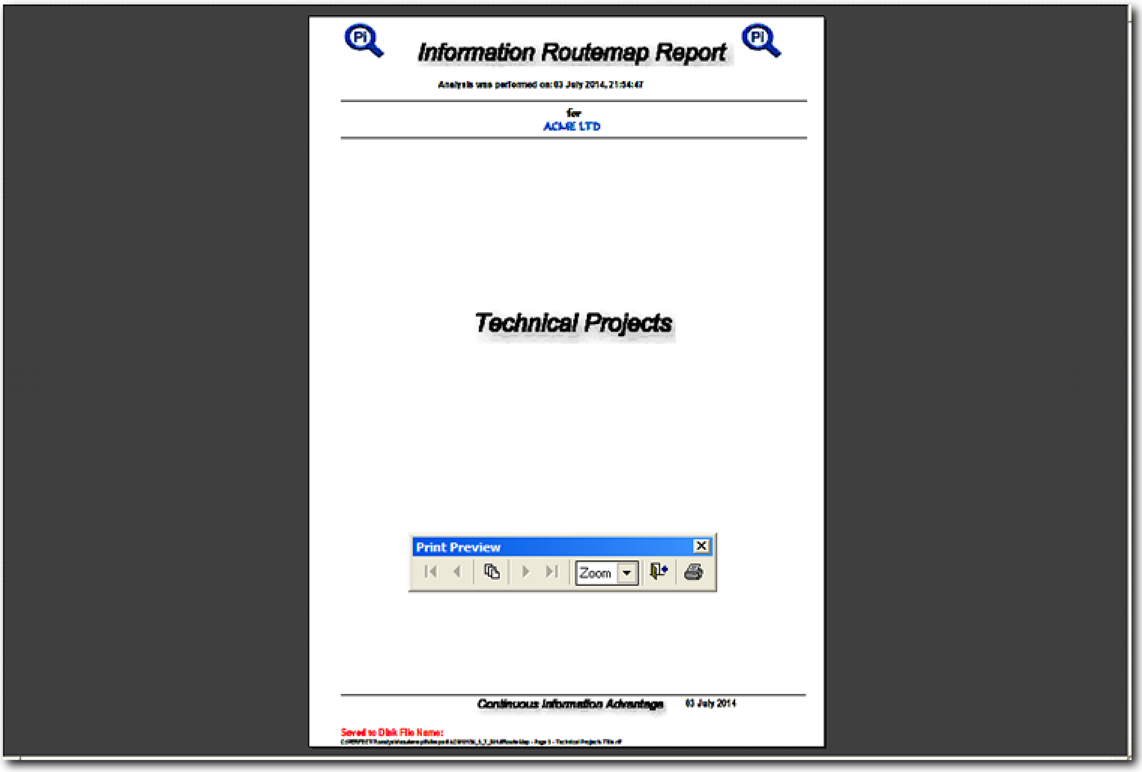
When the report has been viewed on screen, you are informed, via a message box on screen, of the directory in which the report has been saved and you are then returned to the Control Centre.



An example of the complete report is below:


Analysis was performed on: 03 July 2014, 21:54:47
for
ACME LTD
Information Routemap Report
Print Preview
Zoom
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:


Information Routemap Report
The Analysis was run on: 03 July 2014, 21:54:47
for
ACME LTD
The following report has been created by carefully analysing the answers that you provided to the questions within each section of the application.
This report consists of two sections:
The first section covers technical projects and provides 3 reports:
Recommended Base Application Projects
Recommended Data Integration Projects
Recommended Business Process Projects
Details are provided of the projects that need to be undertaken in order to optimise your Information Capability and by so doing, greatly improve your Overall Business Performance.
The details provided cover all application areas and are sorted into priorities based on past performance and your identified Goals, KPIs and importance rankings. The details include the estimated man days required to complete each project, the estimated costs of delivering each project to completion and the costs of purchasing, from us, the individual and detailed project plans for each project.
The second section covers the personnel training recommended and provides 2 reports:
Training required by Department (function)
Estimated costs of training by Department & Total
Print Preview
Zoom
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:



Information Routemap Report

Analysis was performed on: 03 July 2014, 21:54:47

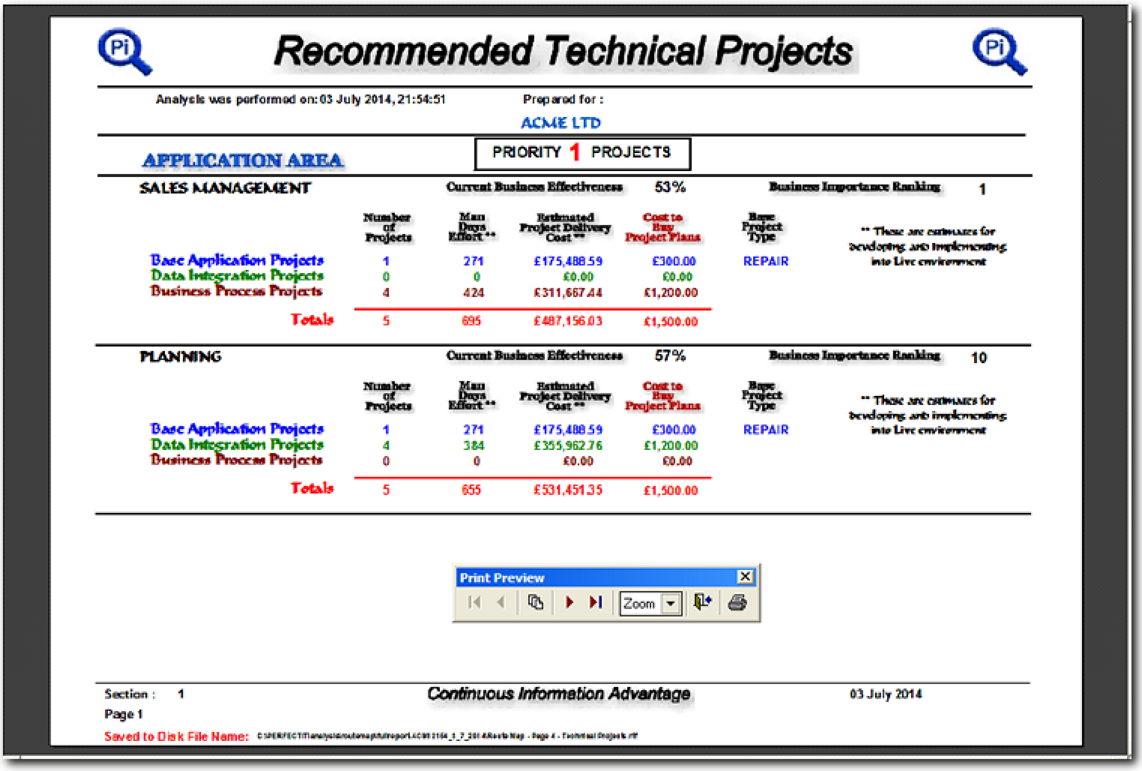
for

ACME LTD

Technical Projects

Continuous Information Advantage 03 July 2014

Saved to Disk File Name:



Recommended Technical Projects

Analysis was performed on: 03 July 2014, 21:54:51 Prepared for :

ACME LTD

APPLICATION AREA PRIORITY 1 PROJECTS

SALES MANAGEMENT Current Business Effectiveness 53% Business Importance Ranking 1

	Number of Projects	Man Days Effort **	Estimated Project Delivery Cost **	Cost to Buy Project Plans	Base Project Type
Base Application Projects	1	271	£175,488.59	£300.00	REPAIR
Data Integration Projects	0	0	£0.00	£0.00	
Business Process Projects	4	424	£311,667.44	£1,200.00	
Totals	5	695	£487,156.03	£1,500.00	

** These are estimates for developing and implementing into Live environment

PLANNING Current Business Effectiveness 57% Business Importance Ranking 10

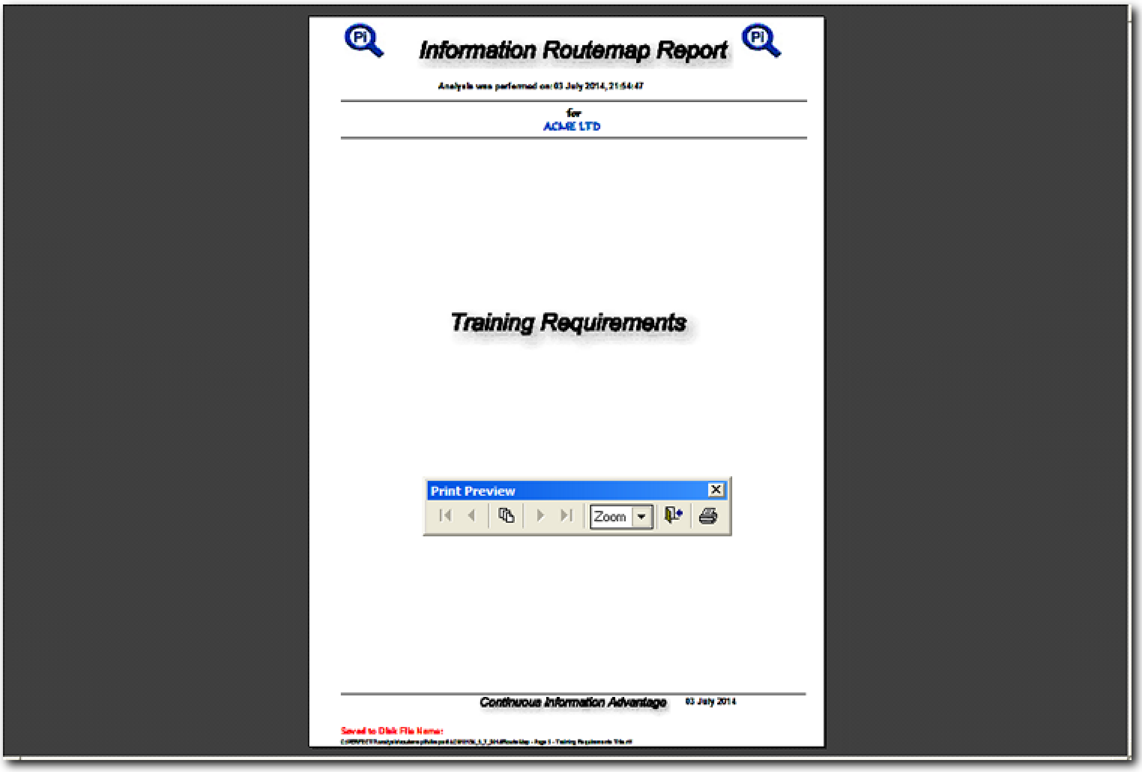
	Number of Projects	Man Days Effort **	Estimated Project Delivery Cost **	Cost to Buy Project Plans	Base Project Type
Base Application Projects	1	271	£175,488.59	£300.00	REPAIR
Data Integration Projects	4	384	£355,962.76	£1,200.00	
Business Process Projects	0	0	£0.00	£0.00	
Totals	5	655	£531,451.35	£1,500.00	

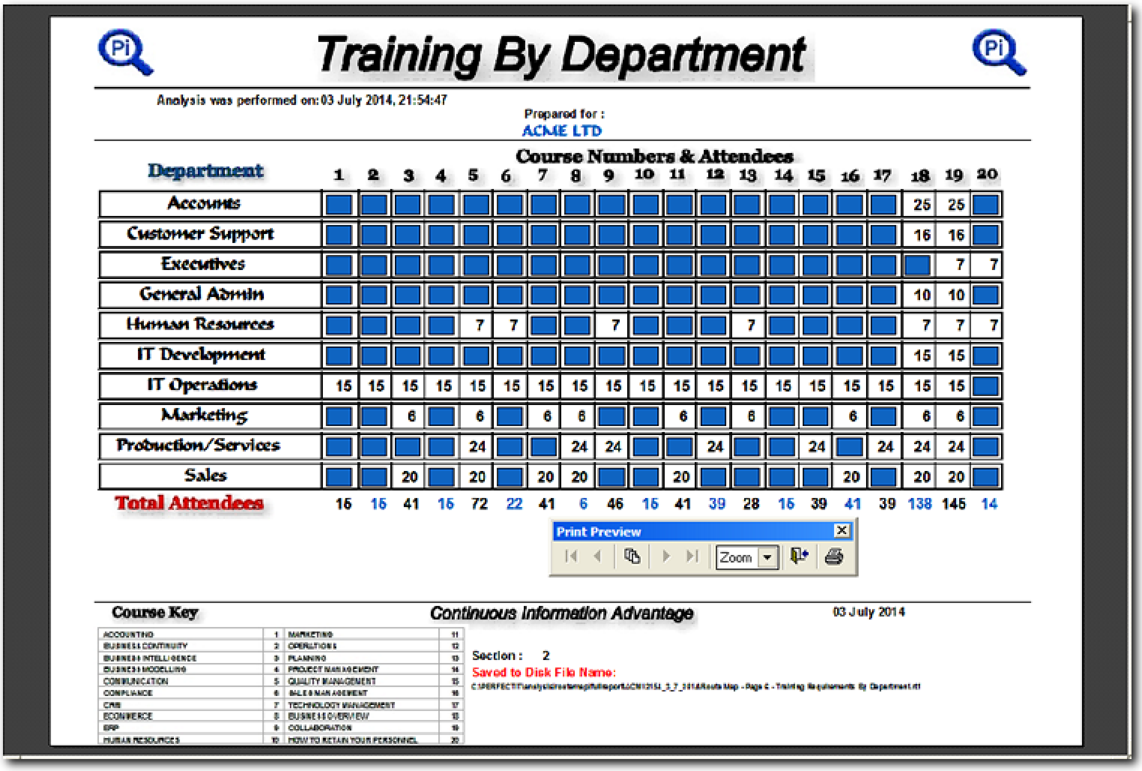
** These are estimates for developing and implementing into Live environment

Section : 1 Continuous Information Advantage 03 July 2014

Page 1

Saved to Disk File Name:




Training By Department

Analysis was performed on: 03 July 2014, 21:54:47

Prepared for :
ACME LTD

Course Numbers & Attendees

Department	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Accounts																		25	25	
Customer Support																		16	16	
Executives																			7	7
General Admin																		10	10	
Human Resources					7	7			7				7					7	7	7
IT Development																		15	15	
IT Operations	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	
Marketing			6		6		6	6			6		6			6		6	6	
Production/Services					24			24	24			24			24		24	24	24	
Sales			20		20		20	20			20					20		20	20	
Total Attendees	16	16	41	16	72	22	41	6	46	16	41	39	28	16	39	41	39	138	145	14

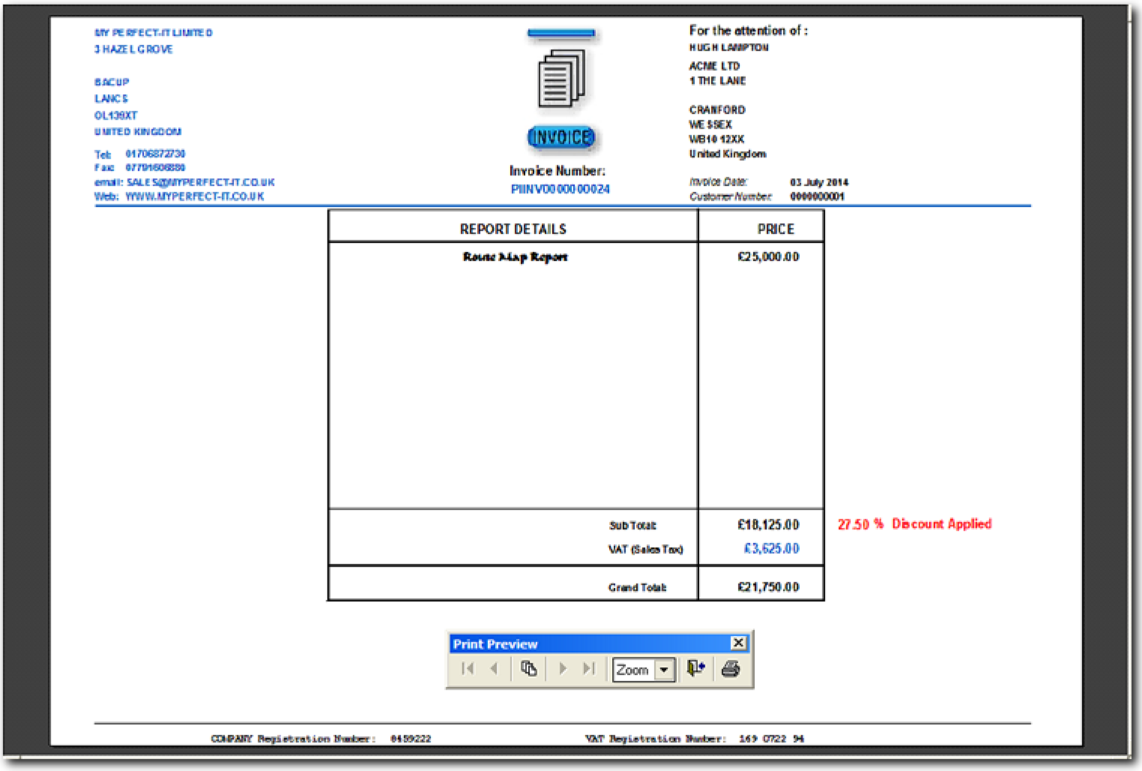
Print Preview
Zoom

Course Key | Continuous Information Advantage | 03 July 2014

ACCOUNTING	1	MARKETING	11
BUSINESS CONTINUITY	2	OPERATIONS	12
BUSINESS INTELLIGENCE	3	PLANNING	13
BUSINESS MODELLING	4	PROJECT MANAGEMENT	14
COMMUNICATION	5	QUALITY MANAGEMENT	15
COMPLIANCE	6	SALES MANAGEMENT	16
CRM	7	TECHNOLOGY MANAGEMENT	17
ECOMMERCE	8	BUSINESS OVERVIEW	18
ERP	9	COLLABORATION	19
HUMAN RESOURCES	10	HOW TO RETAIN YOUR PERSONNEL	20

Section : 2
Saved to Disk File Name:

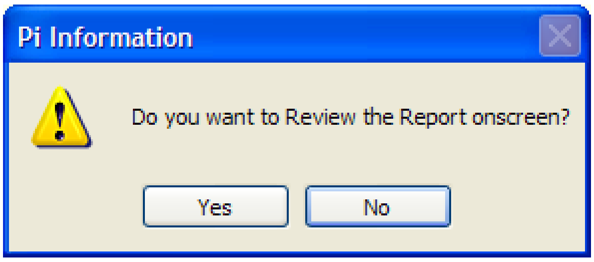
If using the Multi Company version an invoice will be displayed and saved to disk at the completion of the report



2.32 Information Projects Report

Note* Before Running this report you should use the Run Analysis function. Also see Sequence to use when running Reports

On selection of this option from the main menu, Pi will produce the complete Project Plans Report.



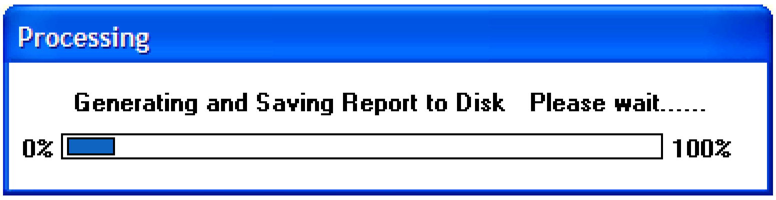
The report consists of 4 sections:

- Detailed Recommended Base Application Projects to be undertaken
- Detailed Recommended Data Integration Projects to be undertaken
- Detailed Recommended Business Process Projects to be undertaken

All include details of estimated Man days and costs and the projects are prioritised based on the results of the analysis performed.

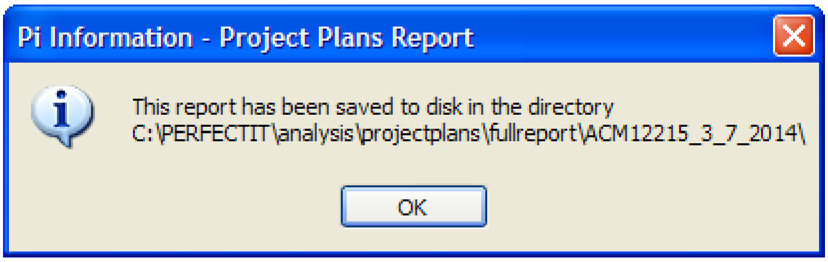
Attached to this report is an additional report which details the Information Gaps identified by the analysis performed

*A dialogue box allows you to choose to review the report onscreen. If you decide not to review the report onscreen a progress bar will appear whilst the report is written to disk.

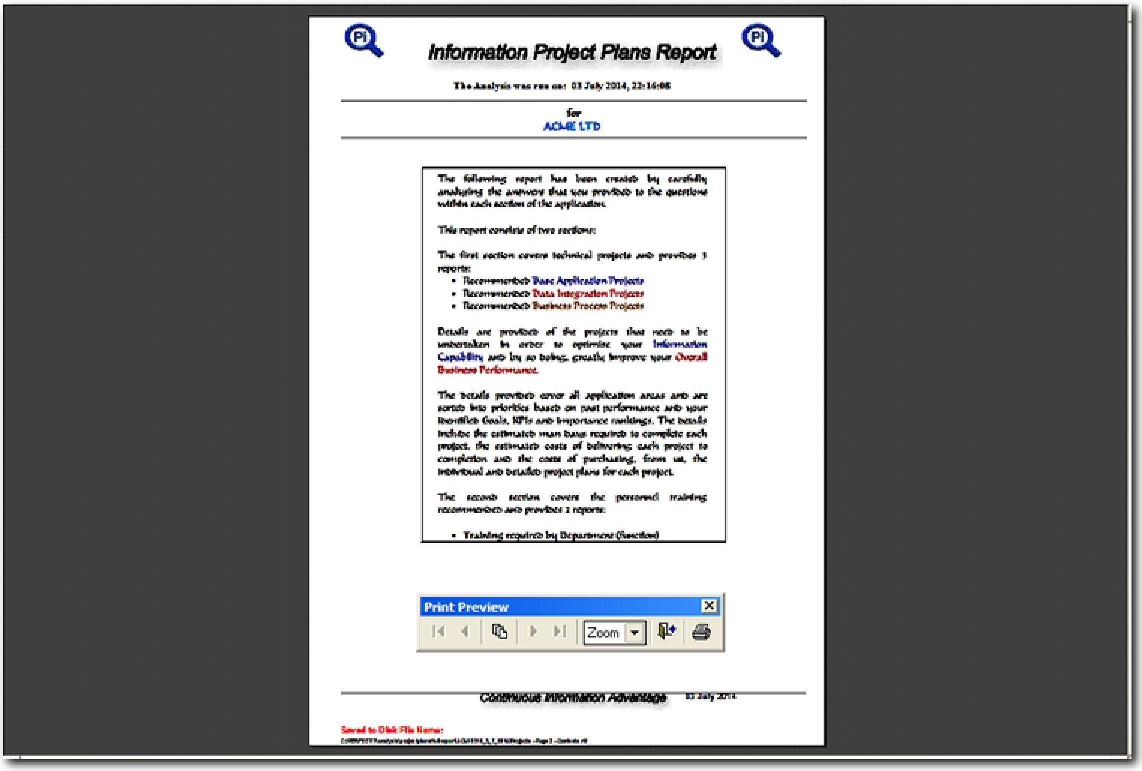


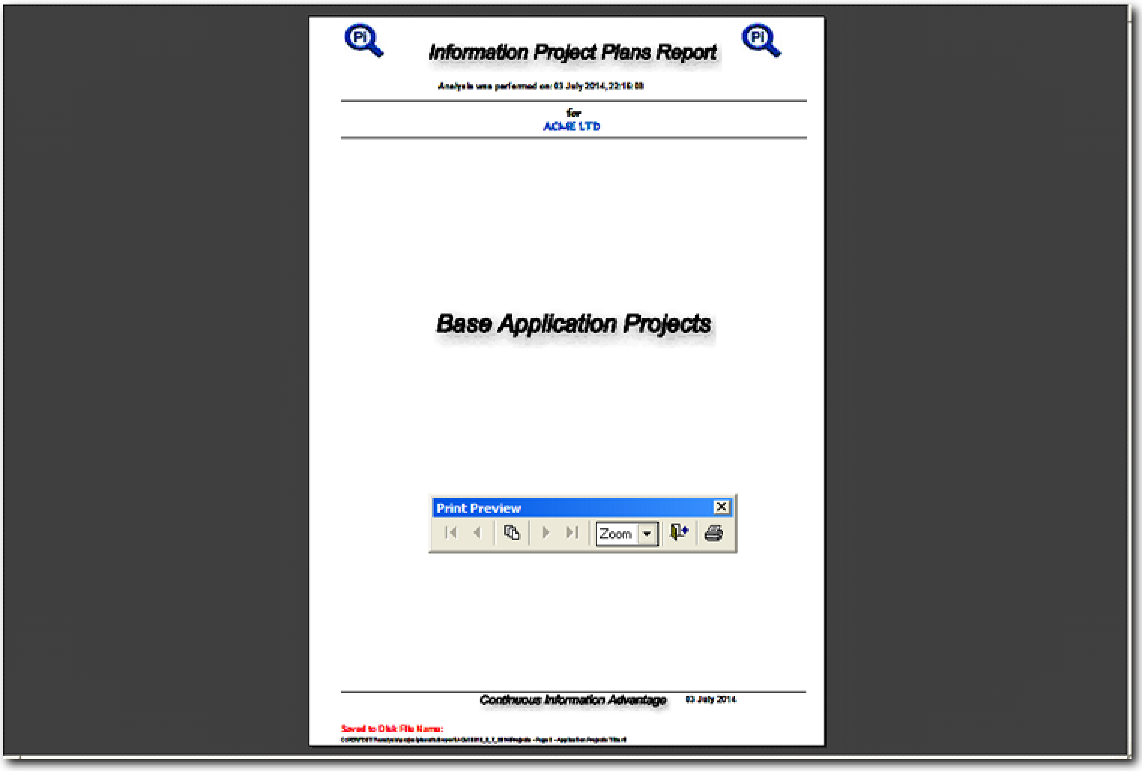
*The report is both displayed on screen from where the individual report pages can be printed and is also saved to disk in word processing format.

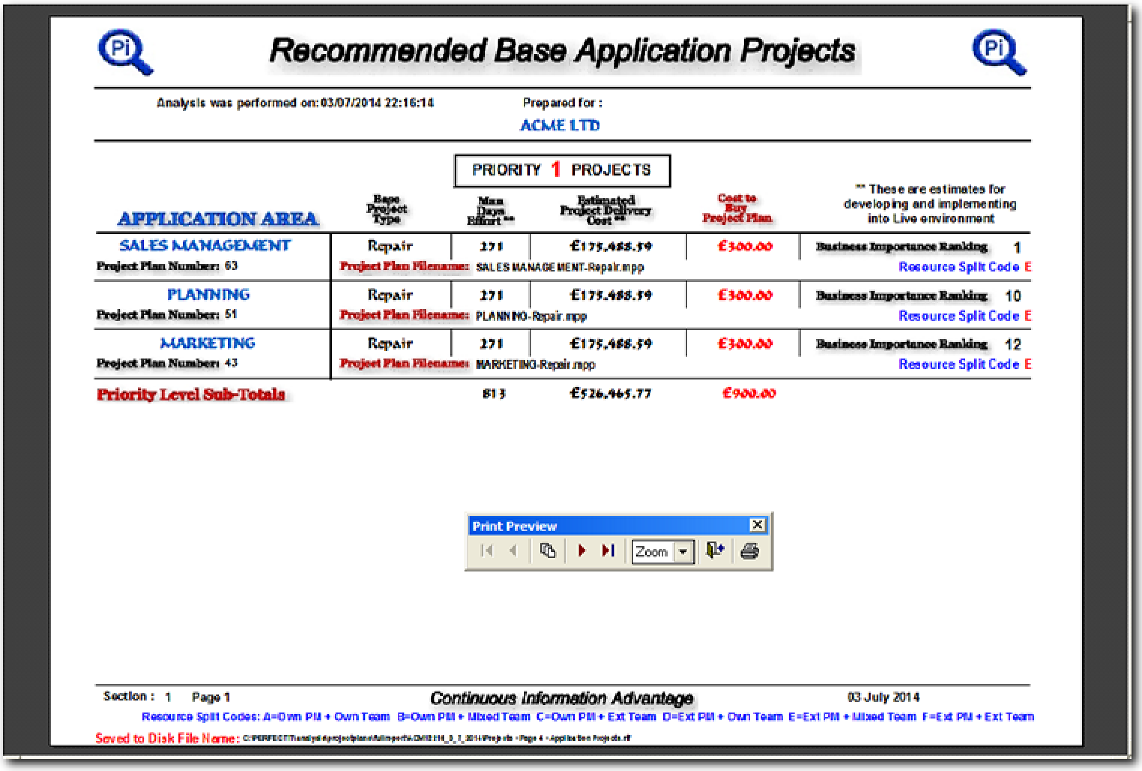
When the report has been viewed on screen, you are informed, via a message box on screen, of the directory in which the report has been saved and you are then returned to the Control Centre.



An example of the complete report is below:


Information Project Plans Report
The Analysis was run on: 03 July 2014, 22:16:08
for
ACME LTD
The following report has been created by carefully analysing the answers that you provided to the questions within each section of the application.
This report consists of two sections:
The first section covers technical projects and provides 3 reports:
Recommended Base Application Projects
Recommended Data Integration Projects
Recommended Business Process Projects
Details are provided of the projects that need to be undertaken in order to optimise your Information Capability and by so doing, greatly improve your Overall Business Performance.
The details provided cover all application areas and are sorted into priorities based on past performance and your identified Goals, KPIs and importance rankings. The details include the estimated man days required to complete each project, the estimated costs of delivering each project to completion and the costs of purchasing, from us, the individual and detailed project plans for each project.
The second section covers the personnel training recommended and provides 2 reports:
Training required by Department (function)
Print Preview
Zoom
Continuous Information Advantage
03 July 2014


Information Project Plans Report
for
ACME LTD
Base Application Projects
Print Preview
Zoom
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:



Recommended Base Application Projects

Analysis was performed on: 03/07/2014 22:16:14

Prepared for : ACME LTD

PRIORITY 1 PROJECTS

** These are estimates for developing and implementing into Live environment

APPLICATION AREA	Base Project Type	Man Days Effort **	Estimated Project Delivery Cost **	Cost to Buy Project Plan	
SALES MANAGEMENT Project Plan Number: 63	Repair Project Plan Filename: SALES MANAGEMENT-Repair.mpp	271	€175,488.59	€300.00	Business Importance Ranking 1 Resource Split Code E
PLANNING Project Plan Number: 51	Repair Project Plan Filename: PLANNING-Repair.mpp	271	€175,488.59	€300.00	Business Importance Ranking 10 Resource Split Code E
MARKETING Project Plan Number: 43	Repair Project Plan Filename: MARKETING-Repair.mpp	271	€175,488.59	€300.00	Business Importance Ranking 12 Resource Split Code E
Priority Level Sub-Totals		813	€526,465.77	€900.00	

Print Preview

Zoom

Section : 1 Page 1 Continuous Information Advantage 03 July 2014

Resource Split Codes: A=Own PM + Own Team B=Own PM + Mixed Team C=Own PM + Ext Team D=Ext PM + Own Team E=Ext PM + Mixed Team F=Ext PM + Ext Team

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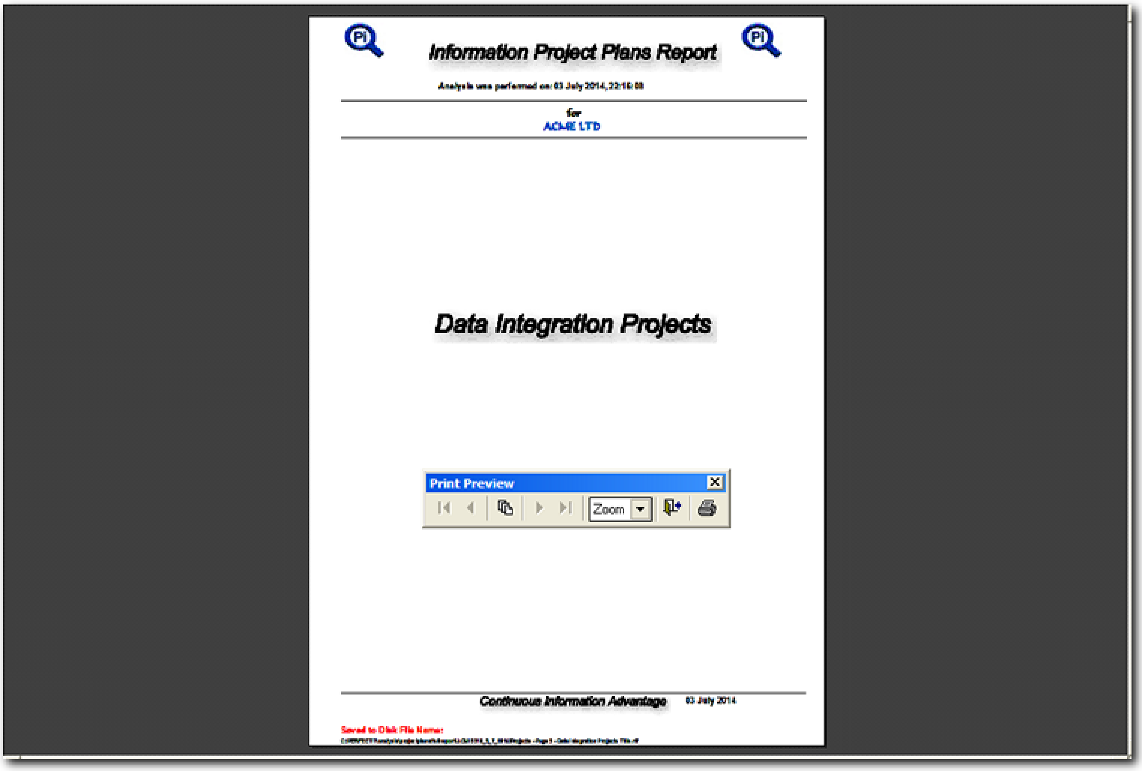
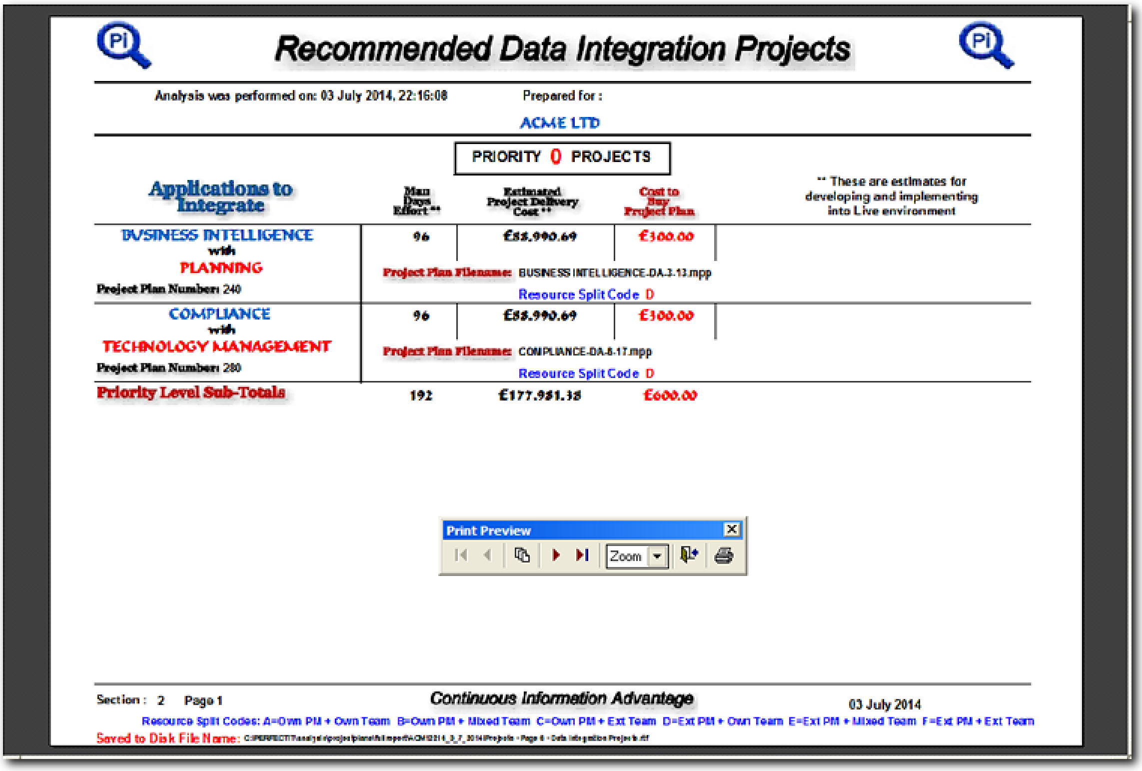

Information Project Plans Report
for
ACME LTD
Data Integration Projects
Print Preview
Zoom
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:



Recommended Data Integration Projects

Analysis was performed on: 03 July 2014, 22:16:08 Prepared for : ACME LTD

PRIORITY 0 PROJECTS

** These are estimates for developing and implementing into Live environment

Applications to Integrate	Man Days Effort **	Estimated Project Delivery Cost **	Cost to Buy Project Plan
BUSINESS INTELLIGENCE with PLANNING Project Plan Number: 240	96	£88,990.69	£300.00
Project Plan Filename: BUSINESS INTELLIGENCE-DA-3-13.mpp Resource Split Code D			
COMPLIANCE with TECHNOLOGY MANAGEMENT Project Plan Number: 280	96	£88,990.69	£300.00
Project Plan Filename: COMPLIANCE-DA-8-17.mpp Resource Split Code D			
Priority Level Sub-Totals	192	£177,981.38	£600.00

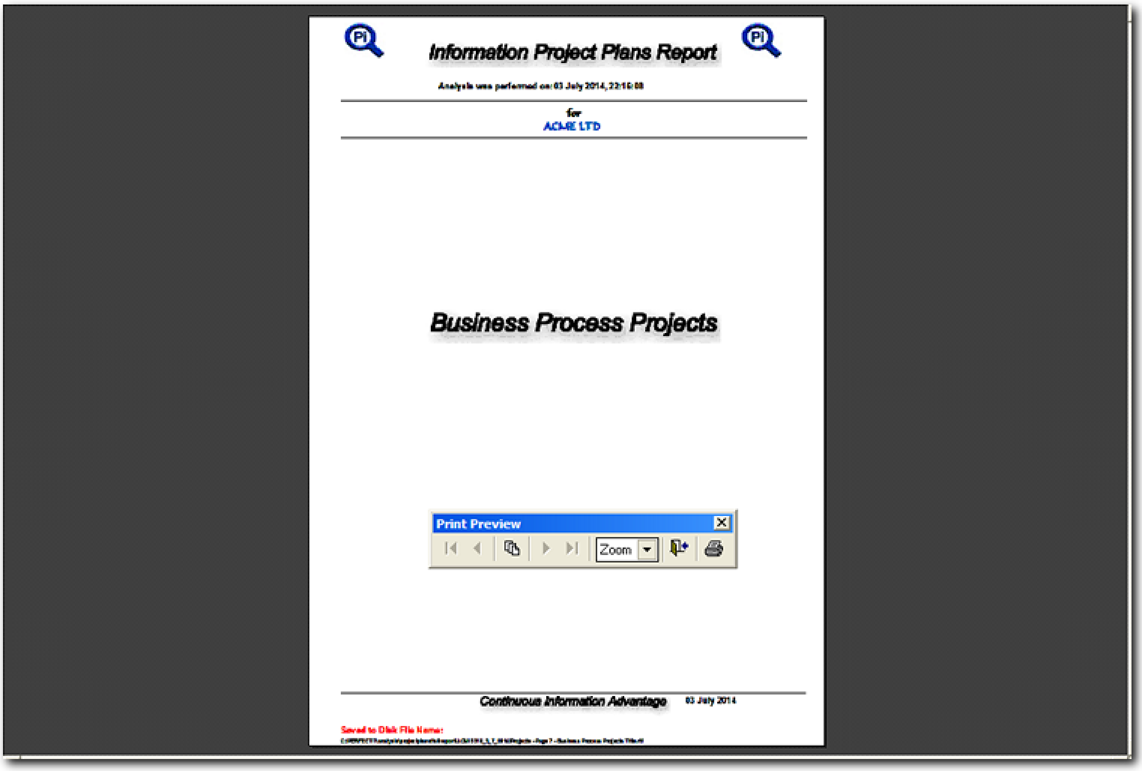
Print Preview

Zoom

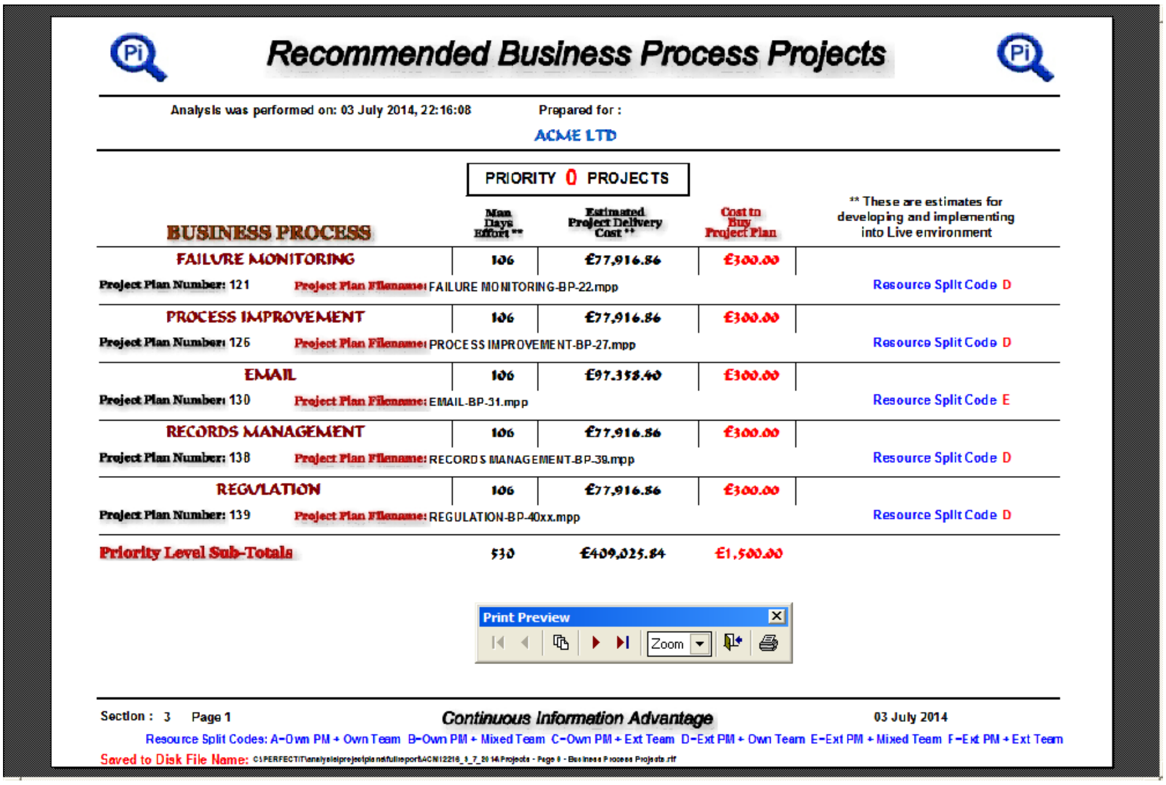
Section : 2 Page 1 Continuous Information Advantage 03 July 2014

Resource Split Codes: A=Own PM + Own Team B=Own PM + Mixed Team C=Own PM + Ext Team D=Ext PM + Own Team E=Ext PM + Mixed Team F=Ext PM + Ext Team

Saved to Disk File Name:



Information Project Plans Report
for
ACME LTD
Business Process Projects
Print Preview
Zoom
Continuous Information Advantage
03 July 2014
Saved to Disk File Name:



Recommended Business Process Projects

Analysis was performed on: 03 July 2014, 22:16:08 Prepared for :
ACME LTD

PRIORITY 0 PROJECTS

BUSINESS PROCESS	Man Days Effort **	Estimated Project Delivery Cost **	Cost to Buy Project Plan	** These are estimates for developing and implementing into Live environment
FAILURE MONITORING	106	£77,916.86	£300.00	
Project Plan Number: 121 Project Plan Filename: FAILURE MONITORING-BP-22.mpp				Resource Split Code D
PROCESS IMPROVEMENT	106	£77,916.86	£300.00	
Project Plan Number: 126 Project Plan Filename: PROCESS IMPROVEMENT-BP-27.mpp				Resource Split Code D
EMAIL	106	£97,358.40	£300.00	
Project Plan Number: 130 Project Plan Filename: EMAIL-BP-31.mpp				Resource Split Code E
RECORDS MANAGEMENT	106	£77,916.86	£300.00	
Project Plan Number: 138 Project Plan Filename: RECORDS MANAGEMENT-BP-39.mpp				Resource Split Code D
REGULATION	106	£77,916.86	£300.00	
Project Plan Number: 139 Project Plan Filename: REGULATION-BP-40xx.mpp				Resource Split Code D
Priority Level Sub-Totals	530	£409,025.84	£1,500.00	

Print Preview

Zoom

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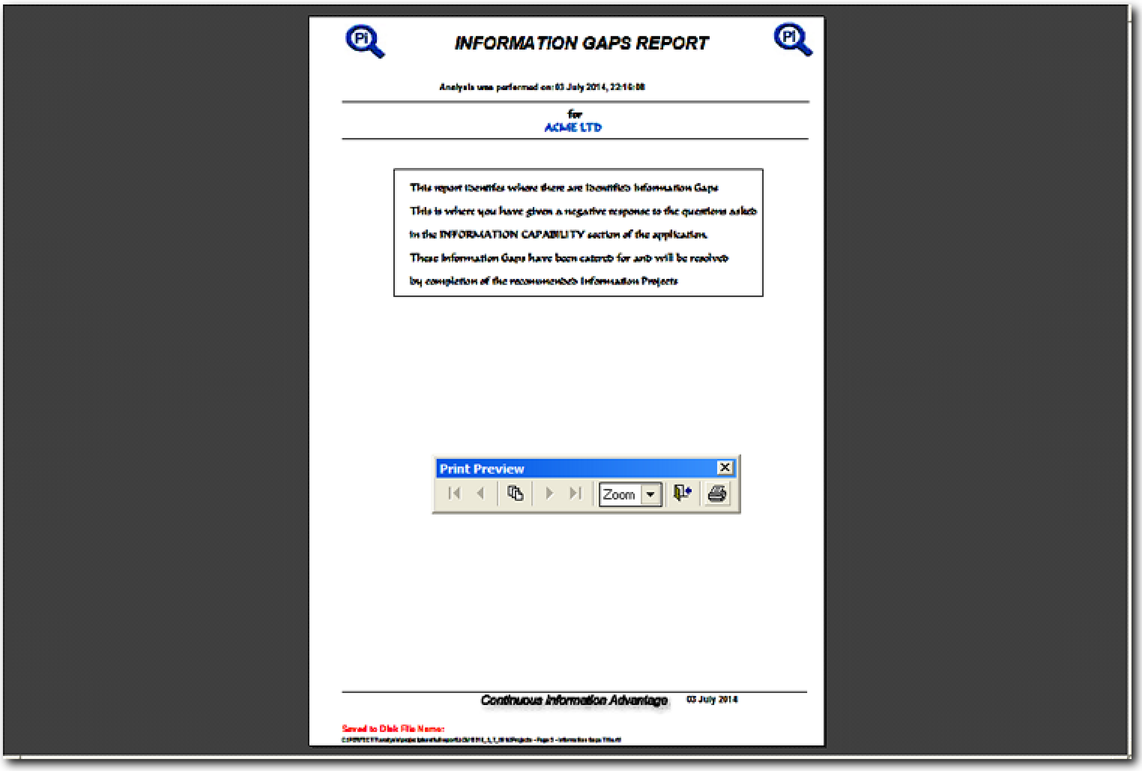
Resource Split Codes: A-Own PM + Own Team B-Own PM + Mixed Team C-Own PM + Ext Team D-Ext PM + Own Team E-Ext PM + Mixed Team F-Ext PM + Ext Team

Saved to Disk File Name:



INFORMATION GAPS REPORT

Analysis was performed on: 03 July 2014, 22:16:08

for
ACME LTD

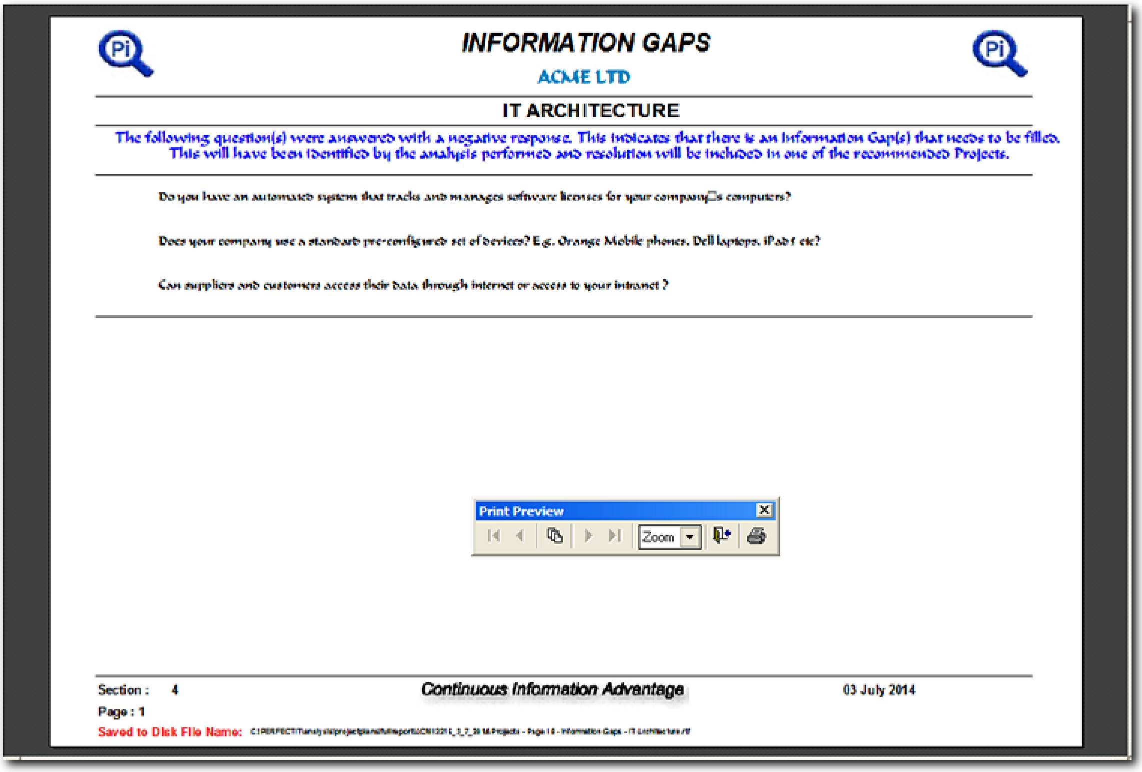
This report identifies where there are identified Information Gaps
This is where you have given a negative response to the questions asked
in the INFORMATION CAPABILITY section of the application.
These Information Gaps have been catered for and will be resolved
by completion of the recommended Information Projects

Print Preview

Zoom

Continuous Information Advantage 03 July 2014

Saved to Disk File Name:



INFORMATION GAPS

ACME LTD

IT ARCHITECTURE

The following question(s) were answered with a negative response. This indicates that there is an Information Gap(s) that needs to be filled. This will have been identified by the analysis performed and resolution will be included in one of the recommended Projects.

Do you have an automated system that tracks and manages software licenses for your company□s computers?

Does your company use a standard pre-configured set of devices? E.g. Orange Mobile phones, Dell laptops, iPads etc?

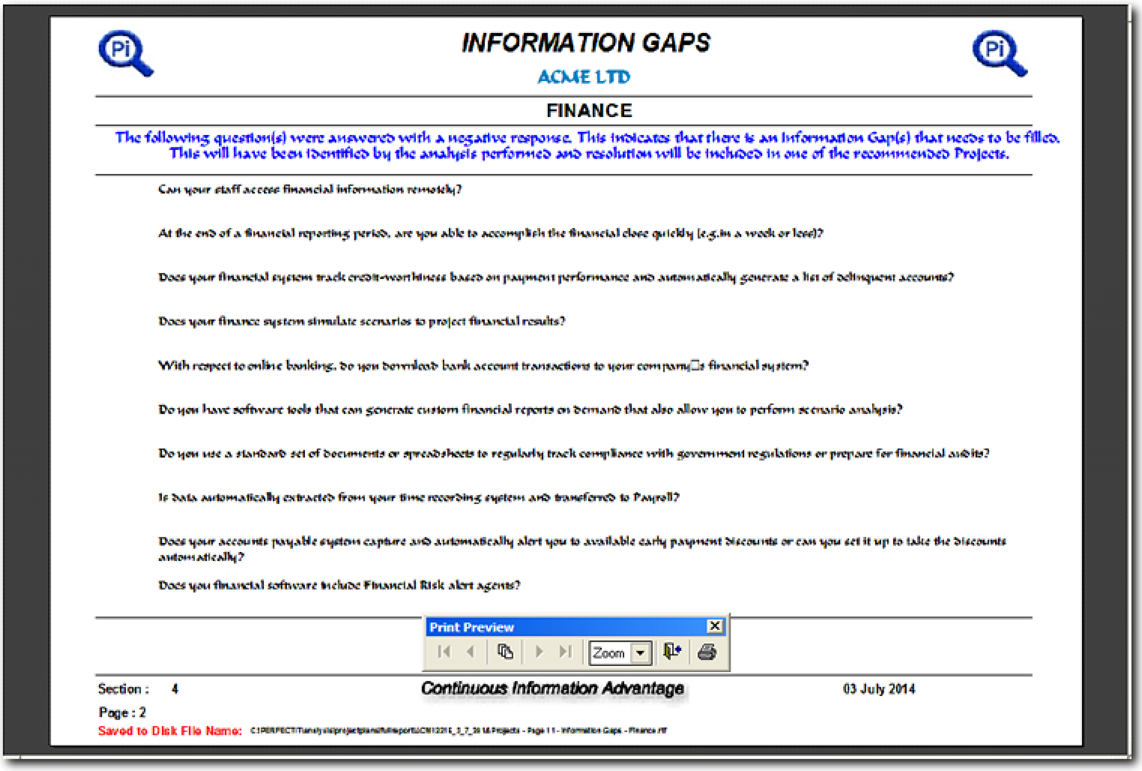
Can suppliers and customers access their data through internet or access to your intranet ?

Print Preview

Section : 4 Continuous Information Advantage 03 July 2014

Page : 1

Saved to Disk File Name:



INFORMATION GAPS

ACME LTD

FINANCE

The following question(s) were answered with a negative response. This indicates that there is an Information Gap(s) that needs to be filled. This will have been identified by the analysis performed and resolution will be included in one of the recommended Projects.

Can your staff access financial information remotely?

At the end of a financial reporting period, are you able to accomplish the financial close quickly (e.g.in a week or less)?

Does your financial system track credit-worthiness based on payment performance and automatically generate a list of delinquent accounts?

Does your finance system simulate scenarios to project financial results?

With respect to online banking, do you download bank account transactions to your company□s financial system?

Do you have software tools that can generate custom financial reports on demand that also allow you to perform scenario analysis?

Do you use a standard set of documents or spreadsheets to regularly track compliance with government regulations or prepare for financial audits?

Is data automatically extracted from your time recording system and transferred to Payroll?

Does your accounts payable system capture and automatically alert you to available early payment discounts or can you set it up to take the discounts automatically?

Does you financial software include Financial Risk alert agents?

Print Preview

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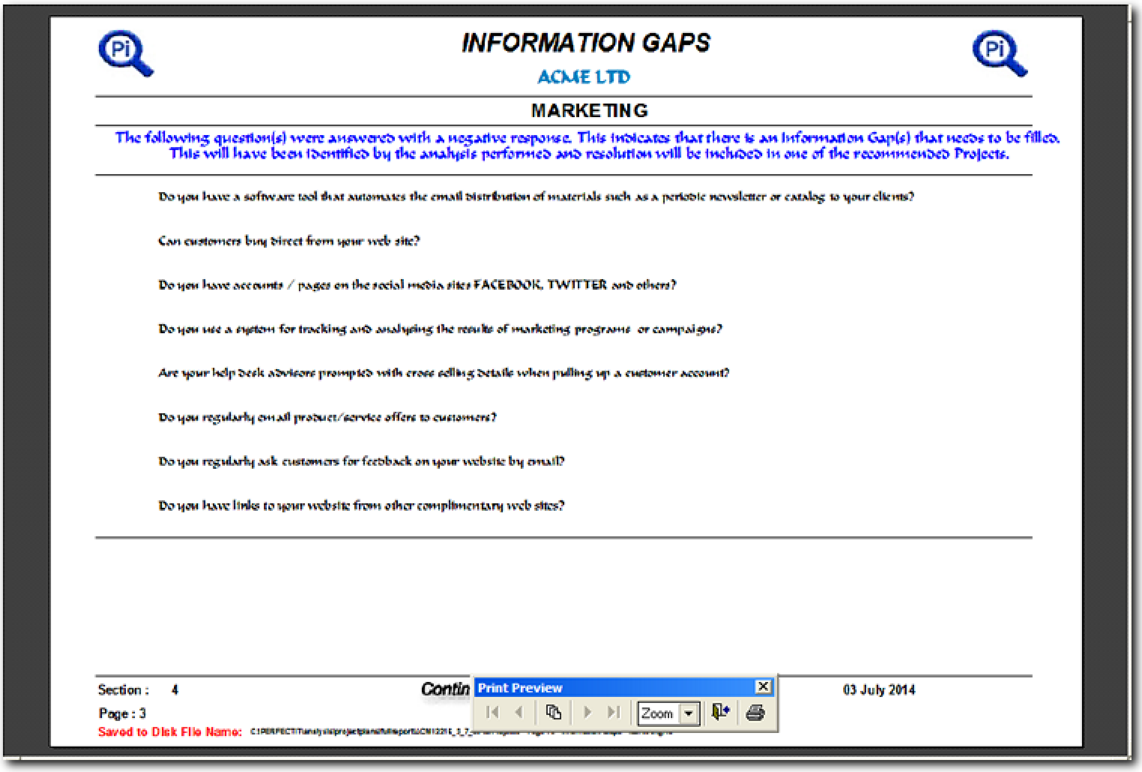
Page : 2

Saved to Disk File Name:



INFORMATION GAPS

ACME LTD

MARKETING

The following question(s) were answered with a negative response. This indicates that there is an Information Gap(s) that needs to be filled. This will have been identified by the analysis performed and resolution will be included in one of the recommended Projects.

Do you have a software tool that automates the email distribution of materials such as a periodic newsletter or catalog to your clients?

Can customers buy direct from your web site?

Do you have accounts / pages on the social media sites FACEBOOK, TWITTER and others?

Do you use a system for tracking and analysing the results of marketing programs or campaigns?

Are your help desk advisors prompted with cross selling details when pulling up a customer account?

Do you regularly email product/service offers to customers?

Do you regularly ask customers for feedback on your website by email?

Do you have links to your website from other complimentary web sites?

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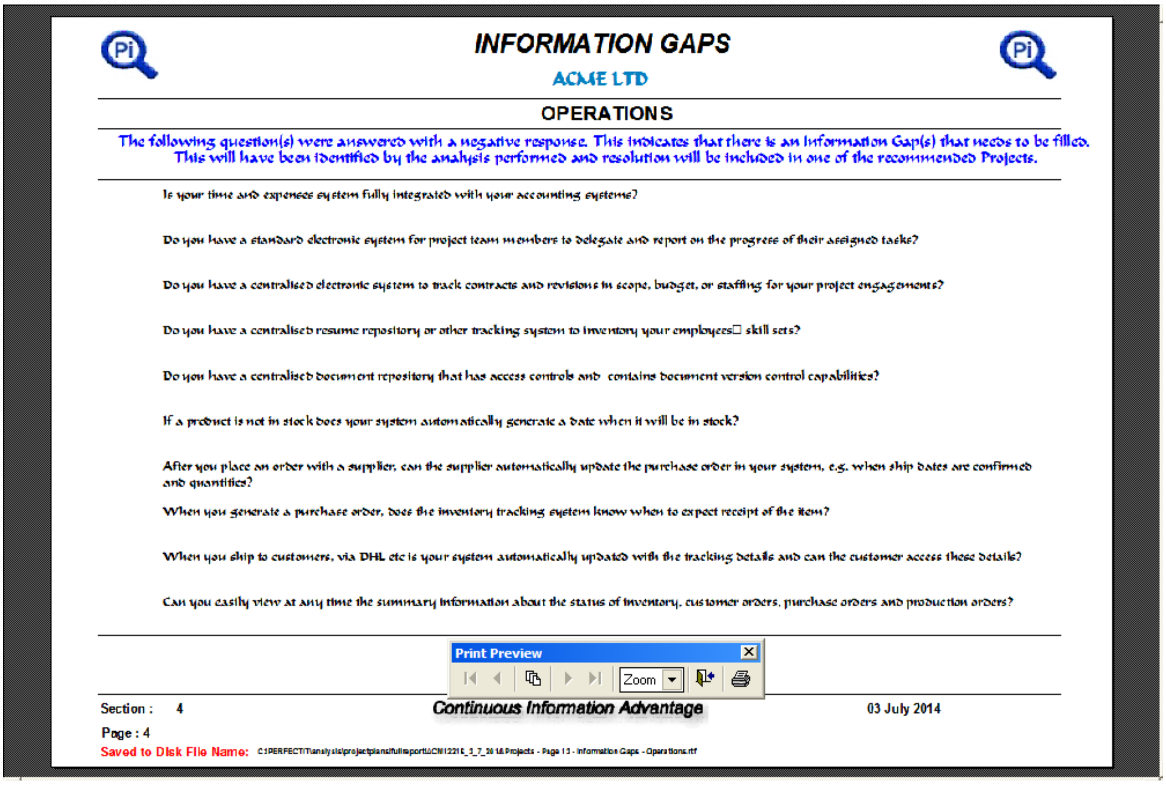
Page : 3

Contin

03 July 2014

Saved to Disk File Name:



INFORMATION GAPS

ACME LTD

OPERATIONS

The following question(s) were answered with a negative response. This indicates that there is an Information Gap(s) that needs to be filled. This will have been identified by the analysis performed and resolution will be included in one of the recommended Projects.

Is your time and expenses system fully integrated with your accounting systems?

Do you have a standard electronic system for project team members to delegate and report on the progress of their assigned tasks?

Do you have a centralised electronic system to track contracts and revisions in scope, budget, or staffing for your project engagements?

Do you have a centralised resume repository or other tracking system to inventory your employees skill sets?

Do you have a centralised document repository that has access controls and contains document version control capabilities?

If a product is not in stock does your system automatically generate a date when it will be in stock?

After you place an order with a supplier, can the supplier automatically update the purchase order in your system, e.g. when ship dates are confirmed and quantities?

When you generate a purchase order, does the inventory tracking system know when to expect receipt of the item?

When you ship to customers, via DHL etc is your system automatically updated with the tracking details and can the customer access these details?

Can you easily view at any time the summary information about the status of inventory, customer orders, purchase orders and production orders?

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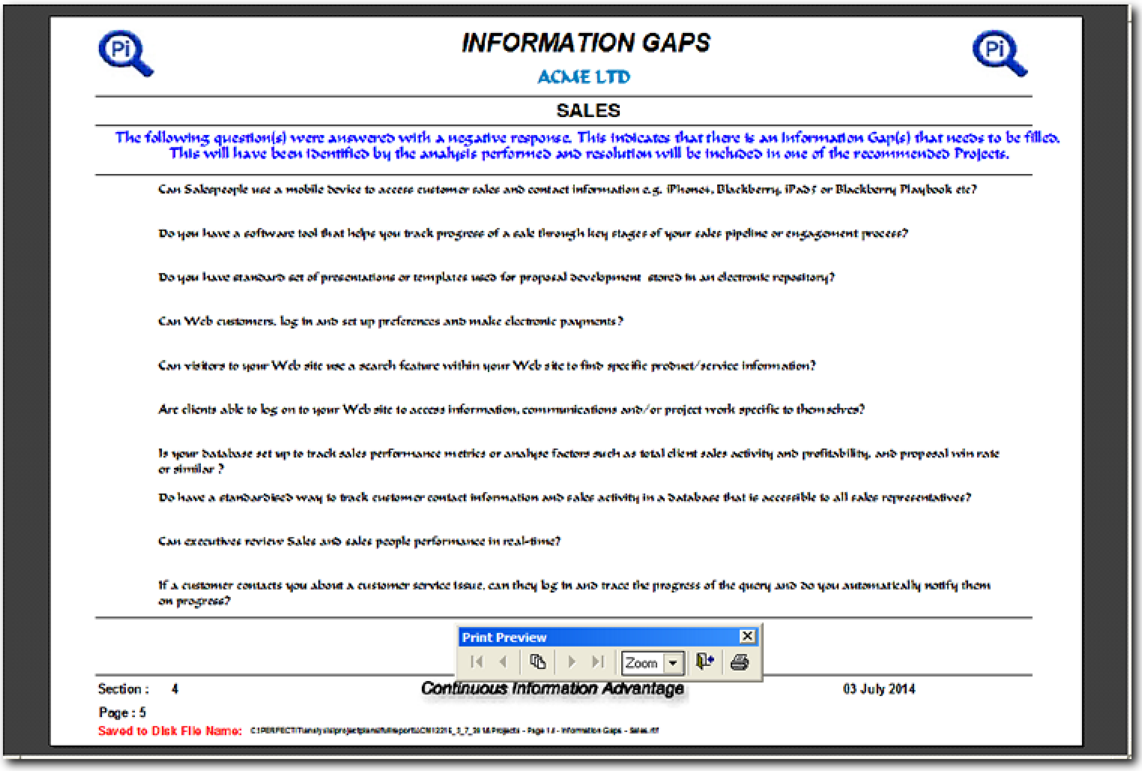
Section : 4

Continuous Information Advantage

03 July 2014

Page : 4

Saved to Disk File Name: C:\PERFECT\Tanalysis\projectplans\fullreport\ACM12216_3_7_2014\Projects - Page 13 - Information Gaps - Operations.rtf



INFORMATION GAPS

ACME LTD

SALES

The following question(s) were answered with a negative response. This indicates that there is an Information Gap(s) that needs to be filled. This will have been identified by the analysis performed and resolution will be included in one of the recommended Projects.

Can Salespeople use a mobile device to access customer sales and contact information e.g. iPhones, Blackberry, iPads or Blackberry Playbook etc?

Do you have a software tool that helps you track progress of a sale through key stages of your sales pipeline or engagement process?

Do you have standard set of presentations or templates used for proposal development stored in an electronic repository?

Can Web customers, log in and set up preferences and make electronic payments?

Can visitors to your Web site use a search feature within your Web site to find specific product/service information?

Are clients able to log on to your Web site to access information, communications and/or project work specific to themselves?

Is your database set up to track sales performance metrics or analyse factors such as total client sales activity and profitability, and proposal win rate or similar ?

Do have a standardised way to track customer contact information and sales activity in a database that is accessible to all sales representatives?

Can executives review Sales and sales people performance in real-time?

If a customer contacts you about a customer service issue, can they log in and trace the progress of the query and do you automatically notify them on progress?

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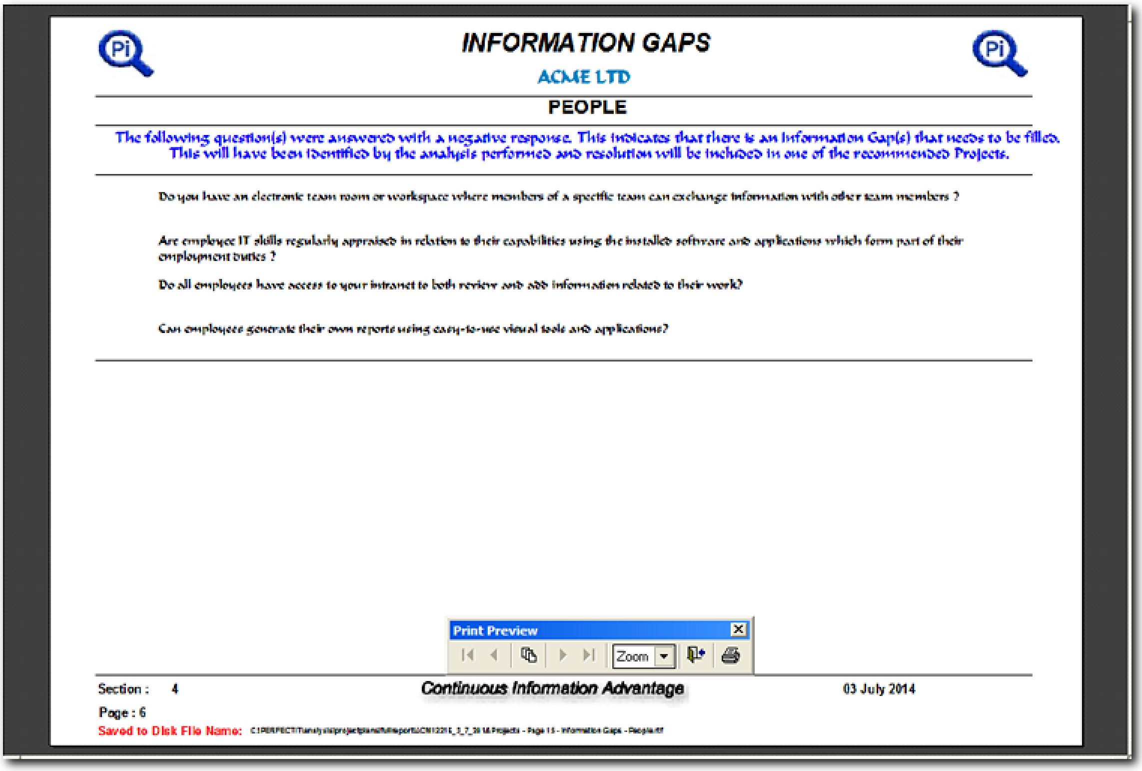
Continuous Information Advantage

03 July 2014

Page : 5

Saved to Disk File Name: C:\PERFECT\Tanalysis\projectplans\fullreport\ACM12216_3_7_2014\Projects - Page 14 - Information Gaps - Sales.rtf


INFORMATION GAPS
ACME LTD
PEOPLE
The following question(s) were answered with a negative response. This indicates that there is an Information Gap(s) that needs to be filled.
This will have been identified by the analysis performed and resolution will be included in one of the recommended Projects.
Do you have an electronic team room or workspace where members of a specific team can exchange information with other team members ?
Are employee IT skills regularly appraised in relation to their capabilities using the installed software and applications which form part of their employment duties ?
Do all employees have access to your intranet to both review and add information related to their work?
Can employees generate their own reports using easy-to-use visual tools and applications?
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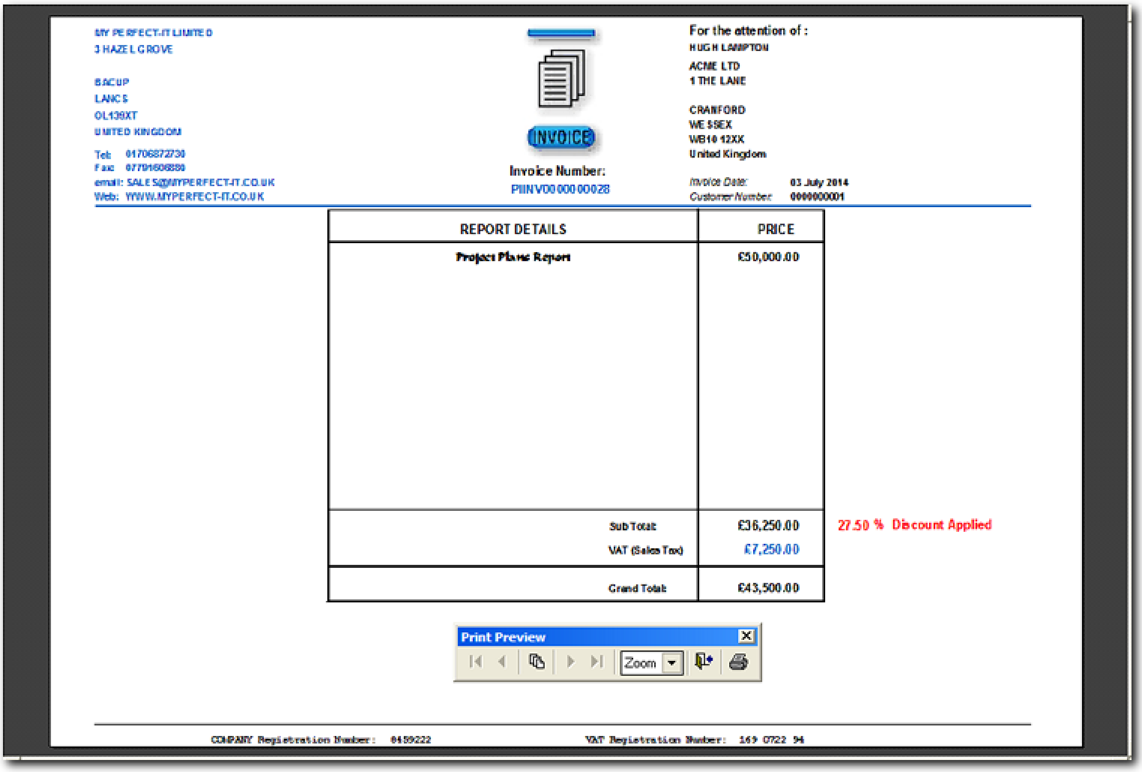
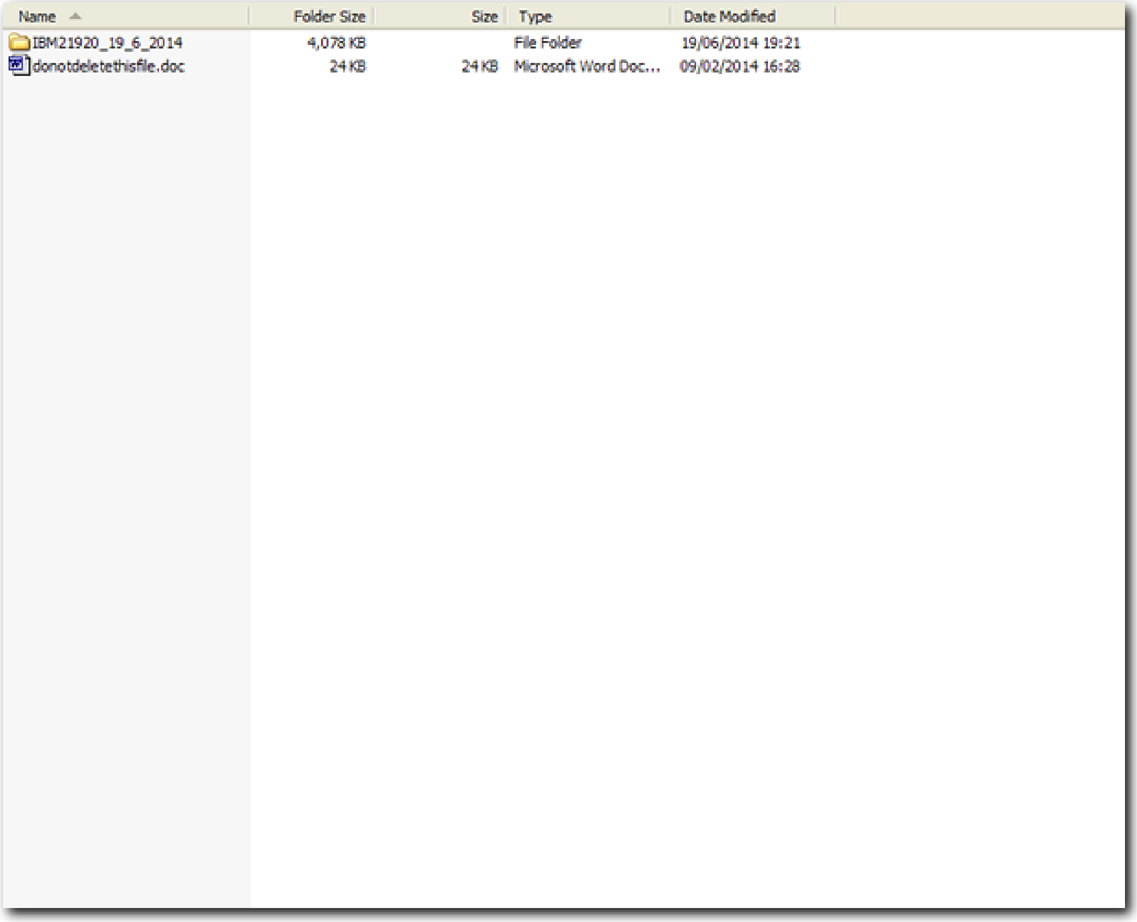
Continuous Information Advantage
03 July 2014
Page : 6
Saved to Disk File Name:

If using the Multi Company version an invoice will be displayed and saved to disk at the completion of the report



2.33 View Strategy Reports on Disk



On selection of this option a pop-up window appears and you can explore the directory structure to see where your Strategy Reports are stored locally. By double-clicking on a sub-directory, a list of files will be displayed double-clicking on a file it will be opened for review (and/or) printing using your default word processing package.

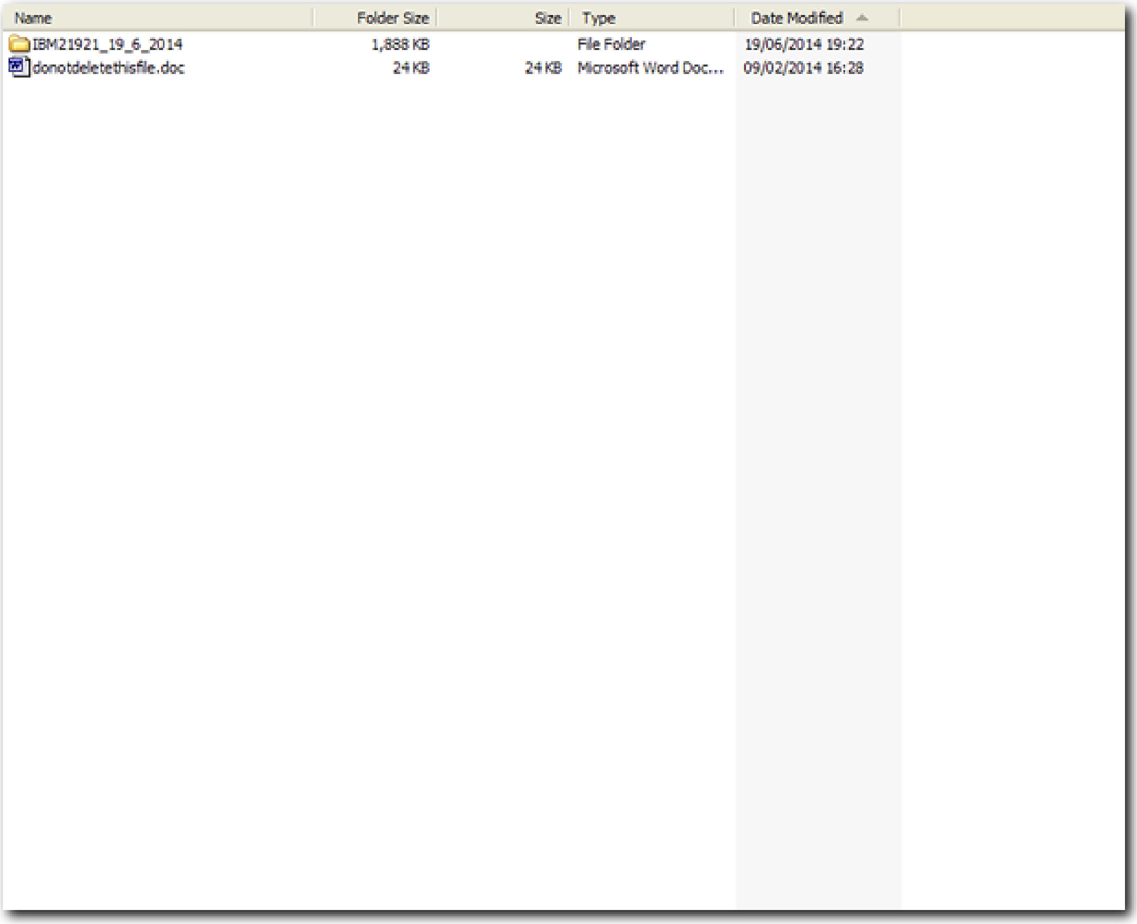
Name	Folder Size	Size	Type	Date Modified
invoice15 .rtf	27 KB	27 KB	Rich Text Format	19/06/2014 19:21
strategy report - page 1 - title.rtf	35 KB	35 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 2 - contents.rtf	115 KB	115 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 3 - executive summary title.rtf	45 KB	45 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 4 - executive summary 1.rtf	50 KB	50 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 5 - executive summary 2.rtf	53 KB	53 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 6 - current position title.rtf	126 KB	126 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 7 - good business processes.rtf	158 KB	158 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 8 - bad business processes.rtf	132 KB	132 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 9 - business goals.rtf	70 KB	70 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 10 - kpis.rtf	44 KB	44 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 11 - importance rankings.rtf	84 KB	84 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 12 - business performance.rtf	73 KB	73 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 13 - applications and software.rtf	72 KB	72 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 14 - hardware.rtf	88 KB	88 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 15 - existing data integration.rtf	285 KB	285 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 16 - required data integration.rtf	100 KB	100 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 17 - staff numbers.rtf	54 KB	54 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 18 - staff business knowledge.rtf	57 KB	57 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 19 - staff it knowledge.rtf	55 KB	55 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 20 - staff info exchange.rtf	59 KB	59 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 21 - staff attrition.rtf	55 KB	55 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 22 - recommendations title.rtf	138 KB	138 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 23 - business processes to review.rtf	177 KB	177 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 24 - goals to review.rtf	93 KB	93 KB	Rich Text Format	19/06/2014 19:20
strategy report - page 25 - kpis to review.rtf	60 KB	60 KB	Rich Text Format	19/06/2014 19:21
strategy report - page 26 - applications to review.rtf	51 KB	51 KB	Rich Text Format	19/06/2014 19:21
strategy report - page 27 - data integration to review.rtf	109 KB	109 KB	Rich Text Format	19/06/2014 19:21
strategy report - page 28 - business knowledge training.rtf	71 KB	71 KB	Rich Text Format	19/06/2014 19:21
strategy report - page 29 - it skills training.rtf	67 KB	67 KB	Rich Text Format	19/06/2014 19:21
strategy report - page 30 - information exchanging training.rtf	72 KB	72 KB	Rich Text Format	19/06/2014 19:21
strategy report - page 31 - staff attrition review.rtf	67 KB	67 KB	Rich Text Format	19/06/2014 19:21
strategy report - page 32 - application area priorities.rtf	119 KB	119 KB	Rich Text Format	19/06/2014 19:21
strategy report - page 33 - technical projects summary.rtf	1,232 KB	1,232 KB	Rich Text Format	19/06/2014 19:21

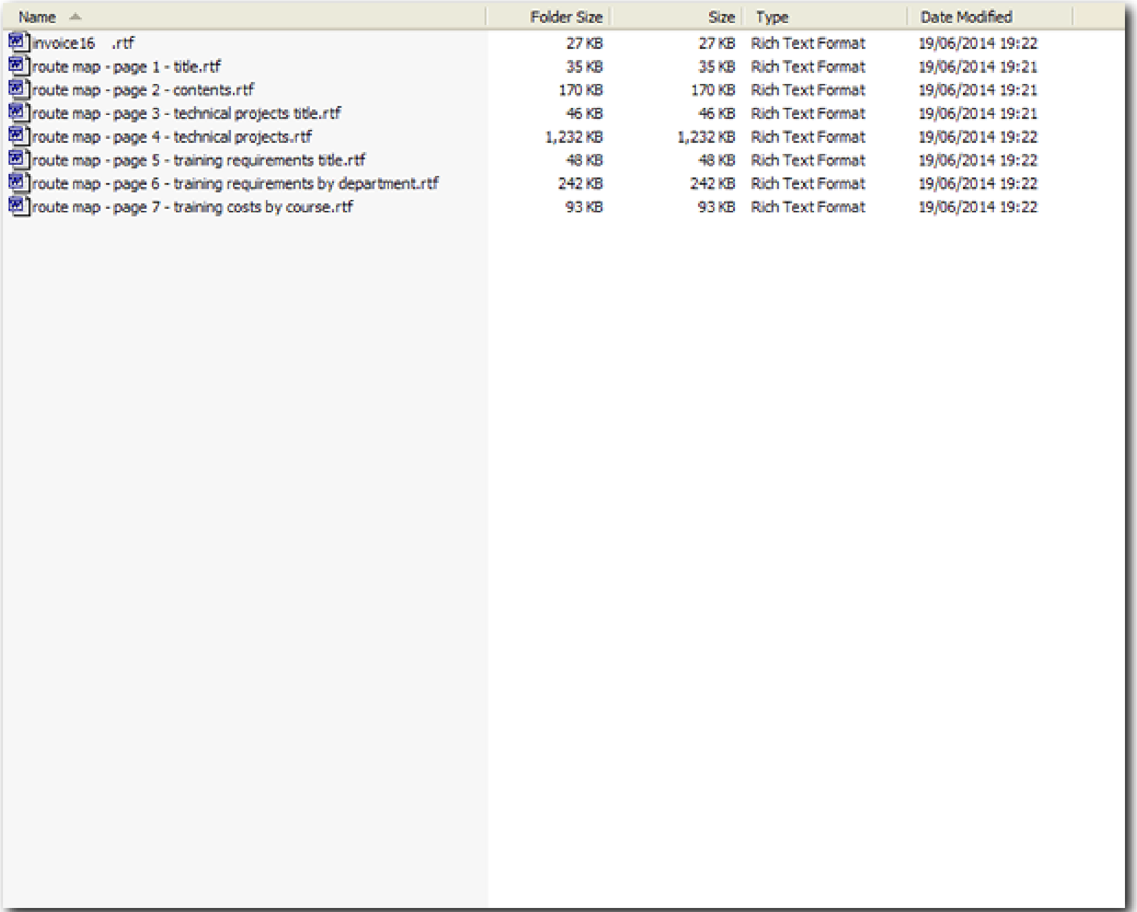
This pop-up window can be closed by clicking **File**, then **Close** from the Menu options at the top of the pop-up window.

Account Options Menu   How Do I - Account Options Menu

2.34 View Route Map Reports On Disk

On selection of this option a pop-up window appears and you can explore the directory structure to see where your Route Map Reports are stored locally. By double-clicking on a sub-directory, a list of files will be displayed double-clicking on a file it will be opened for review (and/or) printing using your default word processing package.



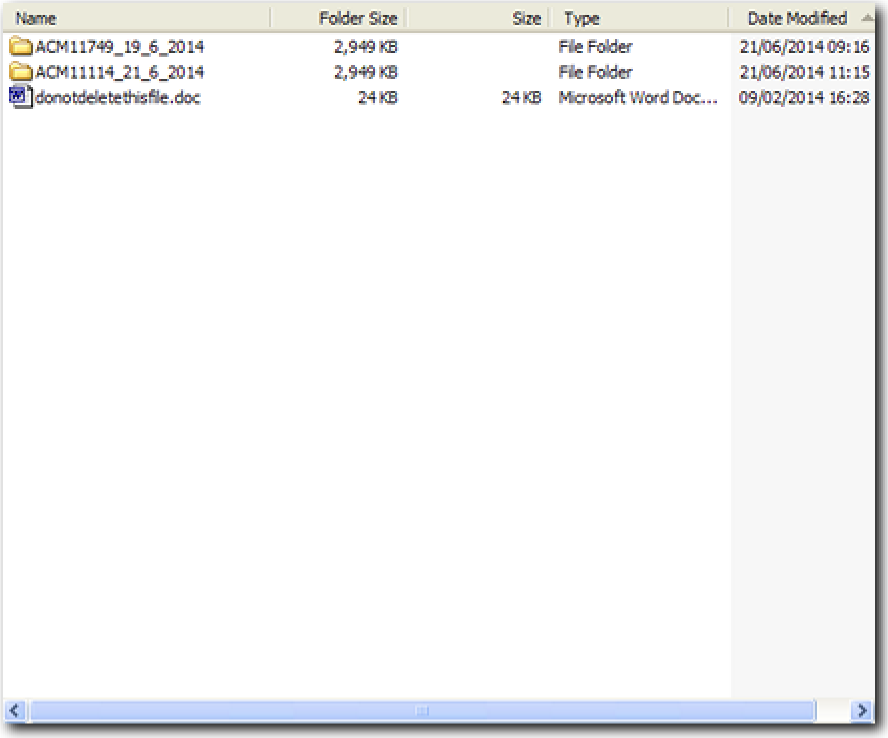


Name	Folder Size	Size	Type	Date Modified
invoice16 .rtf	27 KB	27 KB	Rich Text Format	19/06/2014 19:22
route map - page 1 - title.rtf	35 KB	35 KB	Rich Text Format	19/06/2014 19:21
route map - page 2 - contents.rtf	170 KB	170 KB	Rich Text Format	19/06/2014 19:21
route map - page 3 - technical projects title.rtf	46 KB	46 KB	Rich Text Format	19/06/2014 19:21
route map - page 4 - technical projects.rtf	1,232 KB	1,232 KB	Rich Text Format	19/06/2014 19:22
route map - page 5 - training requirements title.rtf	48 KB	48 KB	Rich Text Format	19/06/2014 19:22
route map - page 6 - training requirements by department.rtf	242 KB	242 KB	Rich Text Format	19/06/2014 19:22
route map - page 7 - training costs by course.rtf	93 KB	93 KB	Rich Text Format	19/06/2014 19:22

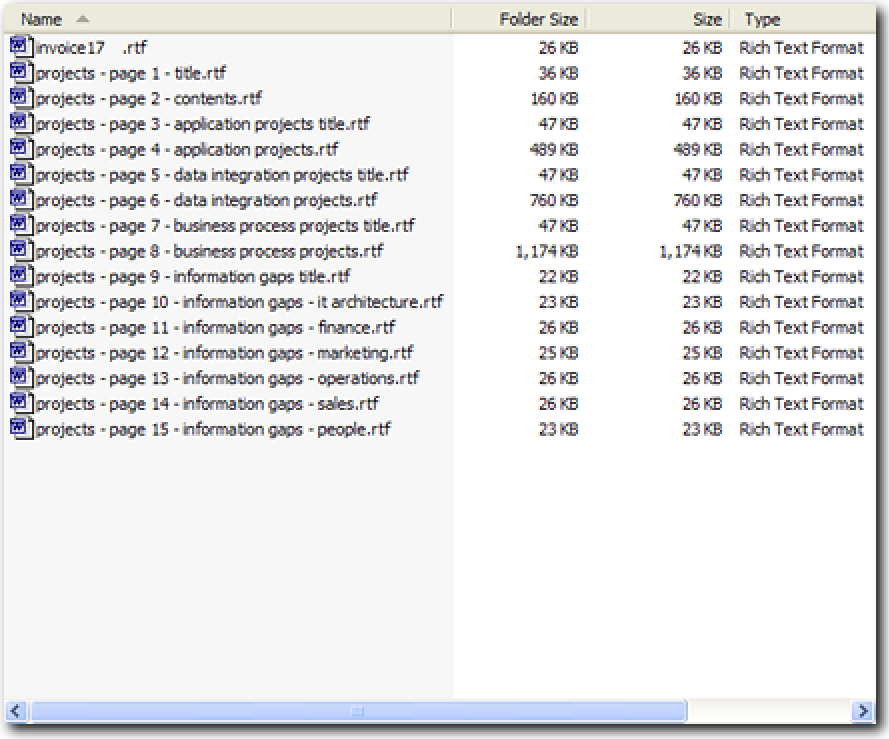
This pop-up window can be closed by clicking **File**, then **Close** from the Menu options at the top of the pop-up window.

Account Options Menu   How Do I - Account Options Menu

2.35 View Projects Reports On Disk



On selection of this option a pop-up window appears and you can explore the directory structure to see where your Project Plan Reports are stored locally. By double-clicking on a sub-directory, a list of files will be displayed double-clicking on a file it will be opened for review (and/or) printing using your default word processing package.



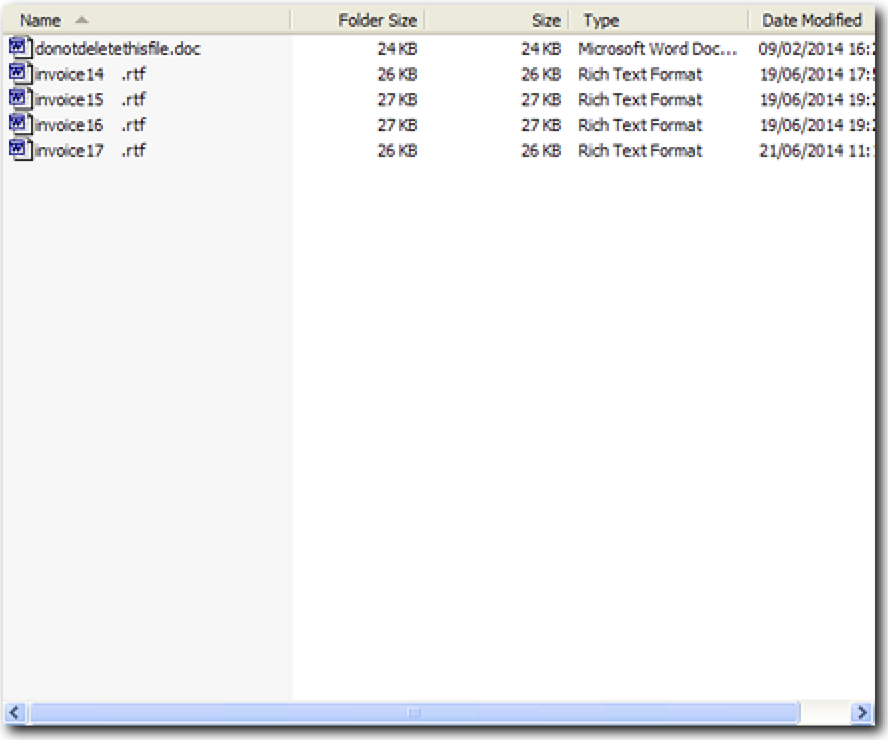
Name	Folder Size	Size	Type
invoice17 .rtf	26 KB	26 KB	Rich Text Format
projects - page 1 - title.rtf	36 KB	36 KB	Rich Text Format
projects - page 2 - contents.rtf	160 KB	160 KB	Rich Text Format
projects - page 3 - application projects title.rtf	47 KB	47 KB	Rich Text Format
projects - page 4 - application projects.rtf	489 KB	489 KB	Rich Text Format
projects - page 5 - data integration projects title.rtf	47 KB	47 KB	Rich Text Format
projects - page 6 - data integration projects.rtf	760 KB	760 KB	Rich Text Format
projects - page 7 - business process projects title.rtf	47 KB	47 KB	Rich Text Format
projects - page 8 - business process projects.rtf	1,174 KB	1,174 KB	Rich Text Format
projects - page 9 - information gaps title.rtf	22 KB	22 KB	Rich Text Format
projects - page 10 - information gaps - it architecture.rtf	23 KB	23 KB	Rich Text Format
projects - page 11 - information gaps - finance.rtf	26 KB	26 KB	Rich Text Format
projects - page 12 - information gaps - marketing.rtf	25 KB	25 KB	Rich Text Format
projects - page 13 - information gaps - operations.rtf	26 KB	26 KB	Rich Text Format
projects - page 14 - information gaps - sales.rtf	26 KB	26 KB	Rich Text Format
projects - page 15 - information gaps - people.rtf	23 KB	23 KB	Rich Text Format

This pop-up window can be closed by clicking **File**, then **Close** from the Menu options at the top of the pop-up window.

Account Options Menu   How Do I - Account Options Menu

2.36 View ALL Invoices

On selection of this option a pop-up window appears and you can explore the directory structure to see where ALL Invoices are stored locally. By double-clicking on a file, the file will be opened for review (and/or) editing using your default word processing package.



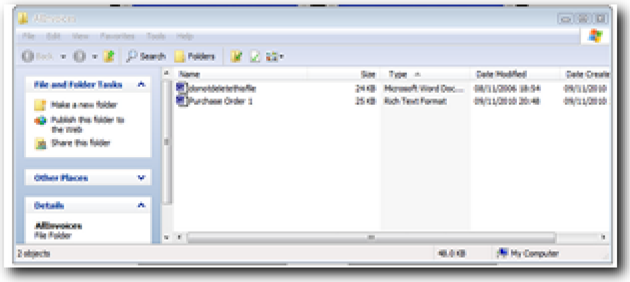
This pop-up window can be closed by clicking File, then Close from the Menu options at the top of the pop-up window.

Account Options Menu   How Do I - Account Options Menu

2.37 View Purchase Orders

This option is only available in the PC Standalone Single Company version.

On selection of this option a pop-up window appears and you can explore the directory structure to see where ALL Purchase Orders are stored locally. By double-clicking on a file, the file will be opened for review (and/or) editing using your default word processing package.

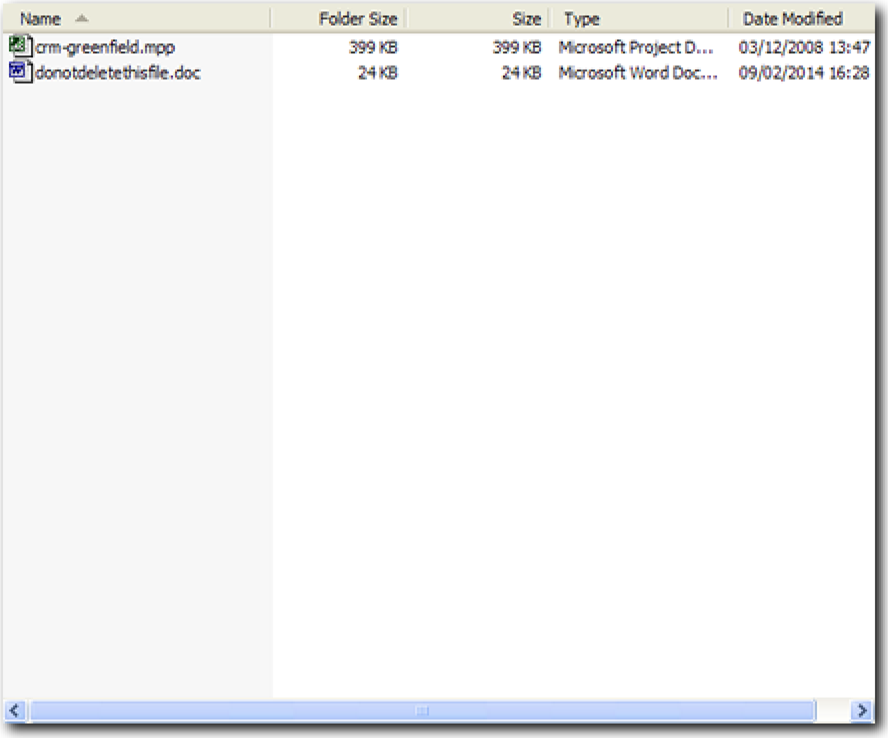


This pop-up window can be closed by clicking File, then Close from the Menu options at the top of the pop-up window.

Account Options Menu   How Do I - Account Options Menu

2.38 View Individual Project Plans on Disk

On selection of this option a pop-up window appears and you can explore the directory structure to see where your Individual Project Plans that you have purchased are stored locally.(note you should copy the plans you purchase from us to this directory or your own to this directory if you wish to access from within Pi. The default directory is *C:\Program Files\{Name of Version of Pi Purchased}\DownloadedProjectPlans.* By double-clicking on a file, the file will be opened for review (and/or) editing using your default Project Management package.

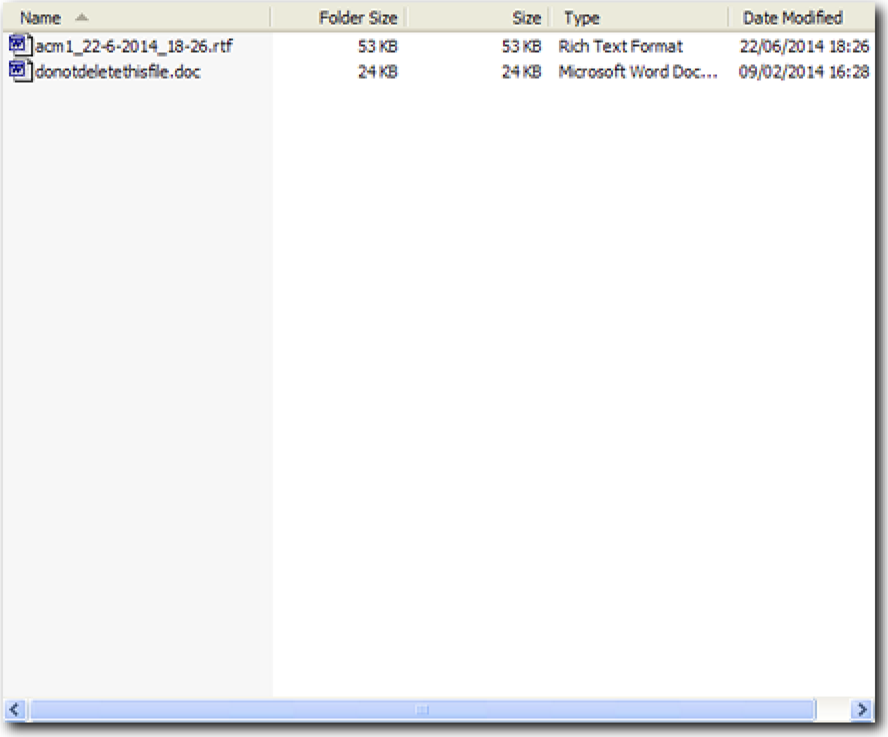


This pop-up window can be closed by clicking File, then Close from the Menu options at the top of the pop-up window.

Account Options Menu   How Do I - Account Options Menu

2.39 View Information Capability Graphs

On selection of this option a pop-up window appears and you can explore the directory structure to see where your Information Capability Graphs are stored locally. By double-clicking on a file, the file will be opened for review (and/or) printing using your default word processing package.

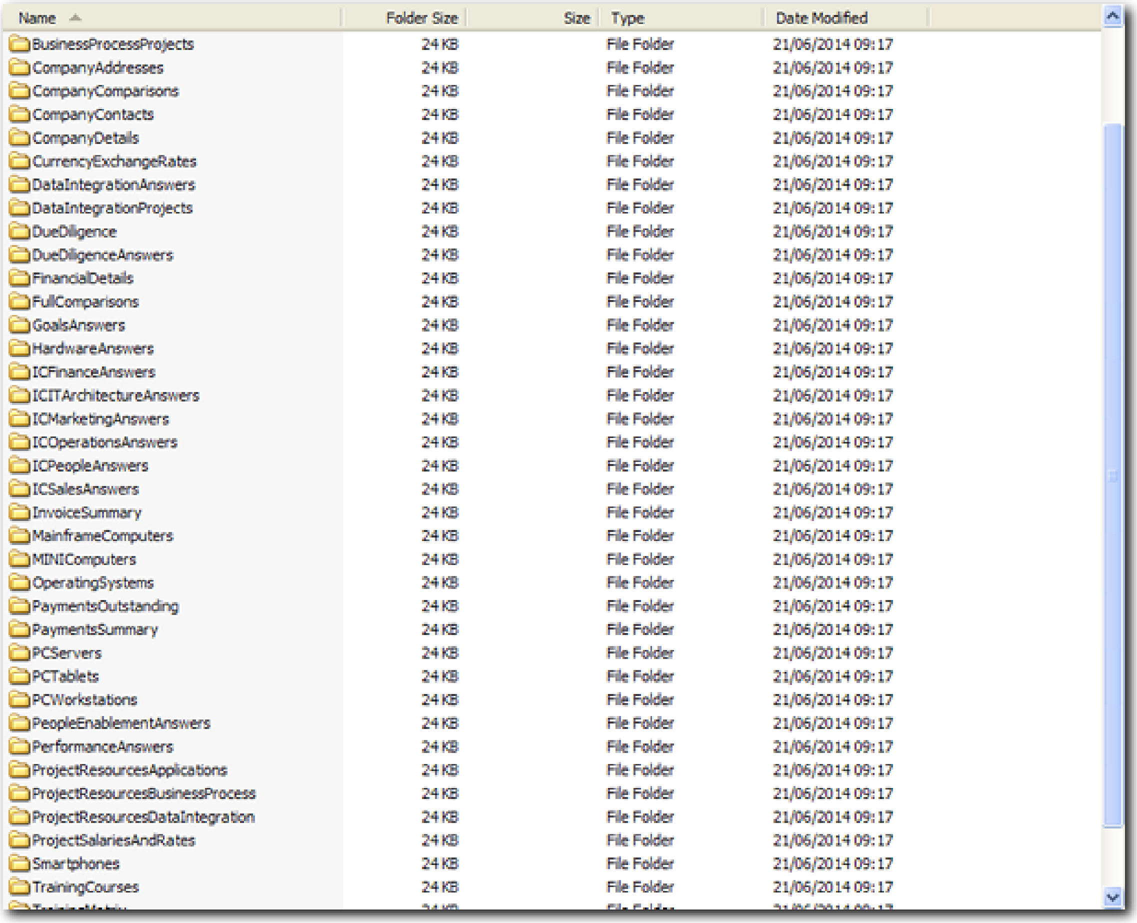


This pop-up window can be closed by clicking **File**, then C**lose** from the Menu options at the top of the pop-up window.

Account Options Menu   How Do I - Account Options Menu

2.40 Location of Reports On Disk

On selection of this option a pop-up window appears which shows the locations (sub-directories) of the reports that you have created and that have been saved to disk.



Name	Folder Size	Size	Type	Date Modified
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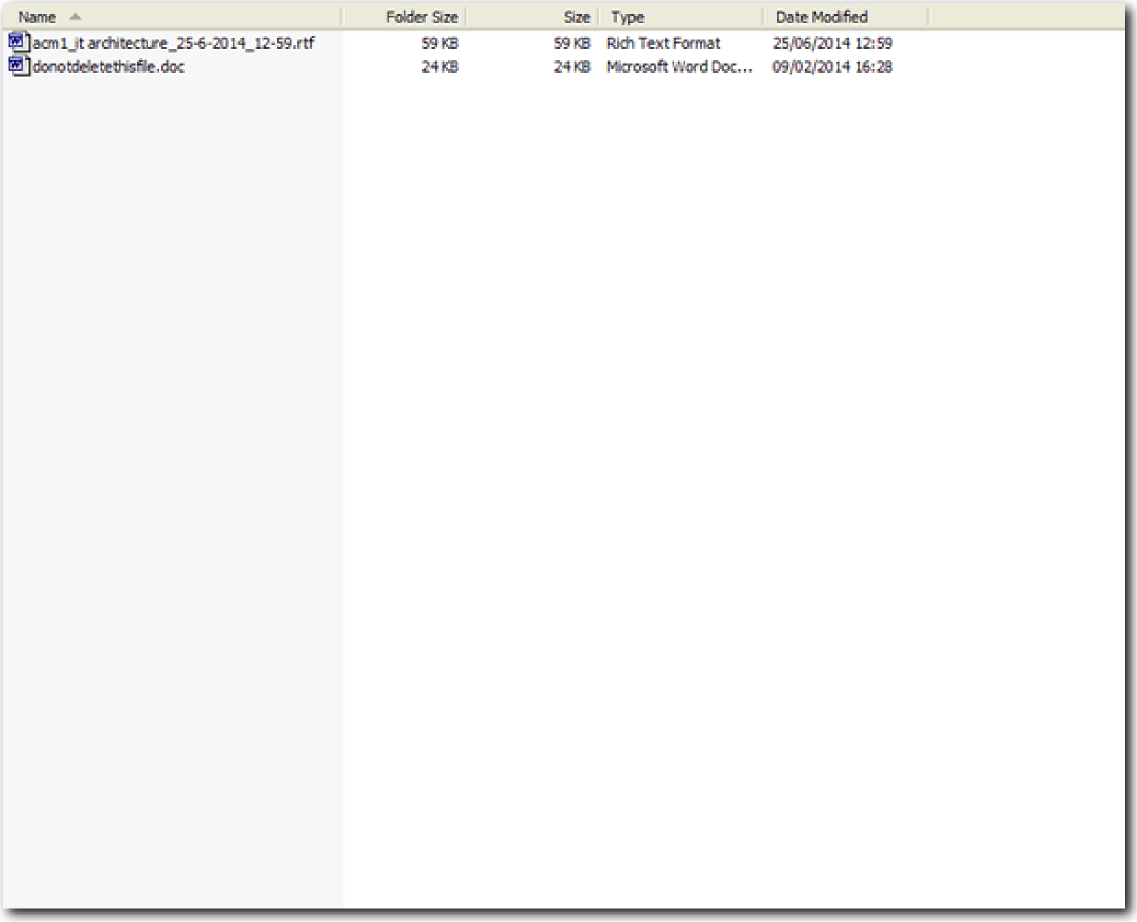
CompanyAddresses	24 KB		File Folder	21/06/2014 09:17
CompanyComparisons	24 KB		File Folder	21/06/2014 09:17
CompanyContacts	24 KB		File Folder	21/06/2014 09:17
CompanyDetails	24 KB		File Folder	21/06/2014 09:17
CurrencyExchangeRates	24 KB		File Folder	21/06/2014 09:17
DataIntegrationAnswers	24 KB		File Folder	21/06/2014 09:17
DataIntegrationProjects	24 KB		File Folder	21/06/2014 09:17
DueDiligence	24 KB		File Folder	21/06/2014 09:17
DueDiligenceAnswers	24 KB		File Folder	21/06/2014 09:17
FinancialDetails	24 KB		File Folder	21/06/2014 09:17
FullComparisons	24 KB		File Folder	21/06/2014 09:17
GoalsAnswers	24 KB		File Folder	21/06/2014 09:17
HardwareAnswers	24 KB		File Folder	21/06/2014 09:17
ICFinanceAnswers	24 KB		File Folder	21/06/2014 09:17
ICITArchitectureAnswers	24 KB		File Folder	21/06/2014 09:17
ICMarketingAnswers	24 KB		File Folder	21/06/2014 09:17
ICOperationsAnswers	24 KB		File Folder	21/06/2014 09:17
ICPeopleAnswers	24 KB		File Folder	21/06/2014 09:17
ICSalesAnswers	24 KB		File Folder	21/06/2014 09:17
InvoiceSummary	24 KB		File Folder	21/06/2014 09:17
MainframeComputers	24 KB		File Folder	21/06/2014 09:17
MINIComputers	24 KB		File Folder	21/06/2014 09:17
OperatingSystems	24 KB		File Folder	21/06/2014 09:17
PaymentsOutstanding	24 KB		File Folder	21/06/2014 09:17
PaymentsSummary	24 KB		File Folder	21/06/2014 09:17
PCServers	24 KB		File Folder	21/06/2014 09:17
PCTablets	24 KB		File Folder	21/06/2014 09:17
PCWorkstations	24 KB		File Folder	21/06/2014 09:17
PeopleEnablementAnswers	24 KB		File Folder	21/06/2014 09:17
PerformanceAnswers	24 KB		File Folder	21/06/2014 09:17
ProjectResourcesApplications	24 KB		File Folder	21/06/2014 09:17
ProjectResourcesBusinessProcess	24 KB		File Folder	21/06/2014 09:17
ProjectResourcesDataIntegration	24 KB		File Folder	21/06/2014 09:17
ProjectSalariesAndRates	24 KB		File Folder	21/06/2014 09:17
Smartphones	24 KB		File Folder	21/06/2014 09:17
TrainingCourses	24 KB		File Folder	21/06/2014 09:17

Double clicking on a sub-directory will open it and display the reports contained within it.
This pop-up window can be closed by clicking **File**, then **Close** from the Menu options at the top of the pop-up window.

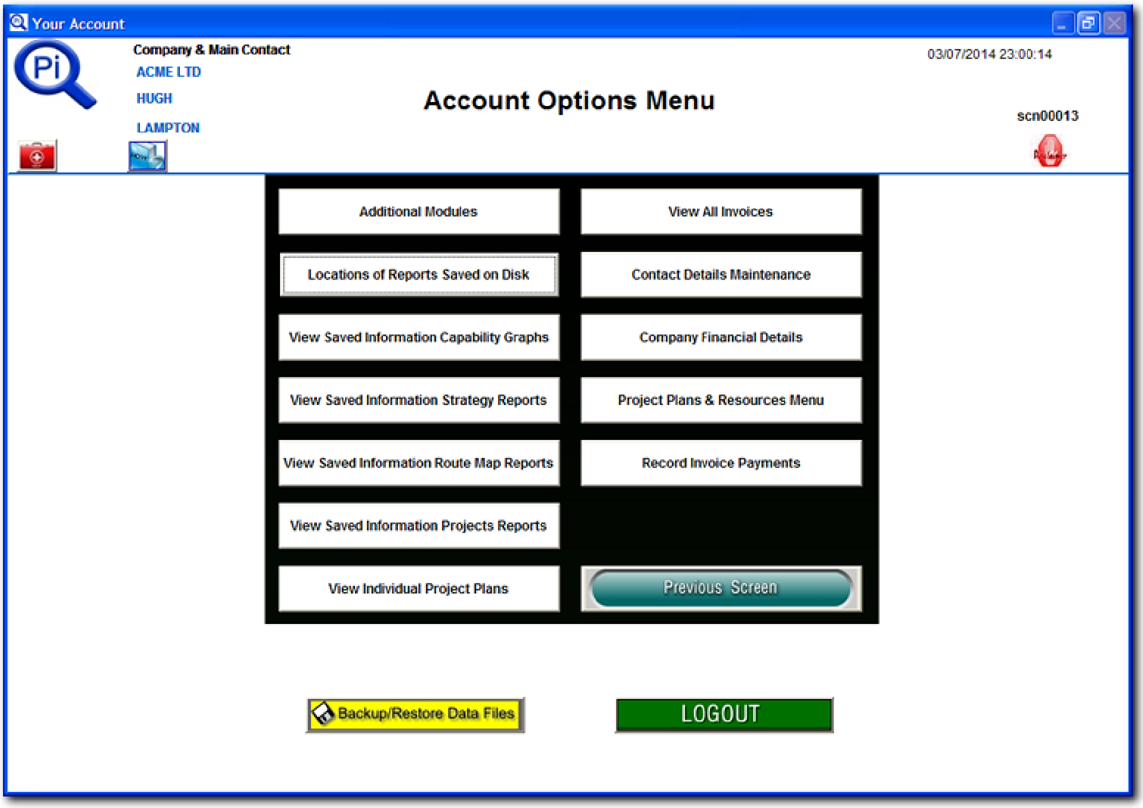
Once the document you wish to review has been located, double-clicking on it will load it into your word processor package for viewing or printing.



The directory names indicate what reports are contained within each e.g. in the example shown above the Directory **ICFinanceanswers** contains reports which show your answers to the **Finance** section of the Information Capability Questionnaire. Each individual file name is made up of the Company short code e.g. ACM1 in this example, a short description of the report specific content (e.g. finance) and the date and time the report was created.
If the file is a reference file e.g. Types of Mini Computer the file name will be made up of a description e.g.mini computer hardware plus the date and time the report was created e.g 'mini computer hardware_1816_11_6_2014.rtf'

Account Options Menu   How Do I - Account Options Menu

2.41 Account Options Menu



This allows you to review details of your financial transactions and also the purchases you have made in terms of reports and documents.

These functions are accessed by selection from the following options:

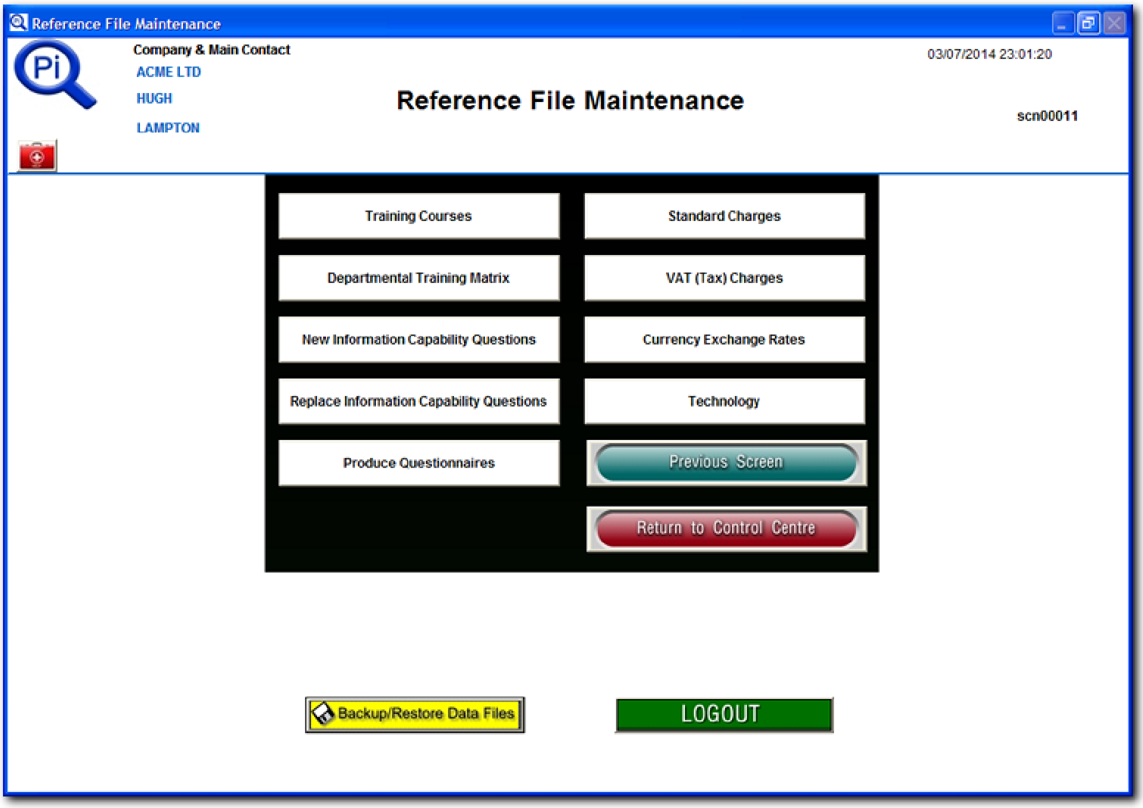
Additional Modules
Location of Reports Saved On Disk
View Saved Information Capability Graphs
View Saved Information Strategy Reports
View Saved Information Route Map Reports
View Saved Information Projects Reports
View Individual Project Plans
View ALL Invoices
Contact Details Maintenance
Company Financial Details
Project Plans Menu
Record Invoice Payments
View Purchase Orders Only available in PC Standalone Single Company Version

To return to the Control Centre you should click the Previous Screen button

Backup / Restore Data Files
This gives access to Data File Security options

Pressing the **LOGOUT** button quits from the application

2.42 Reference File Maintenance



This menu is accessed from the Additional Modules.

For details on each option click the appropriate button below:-

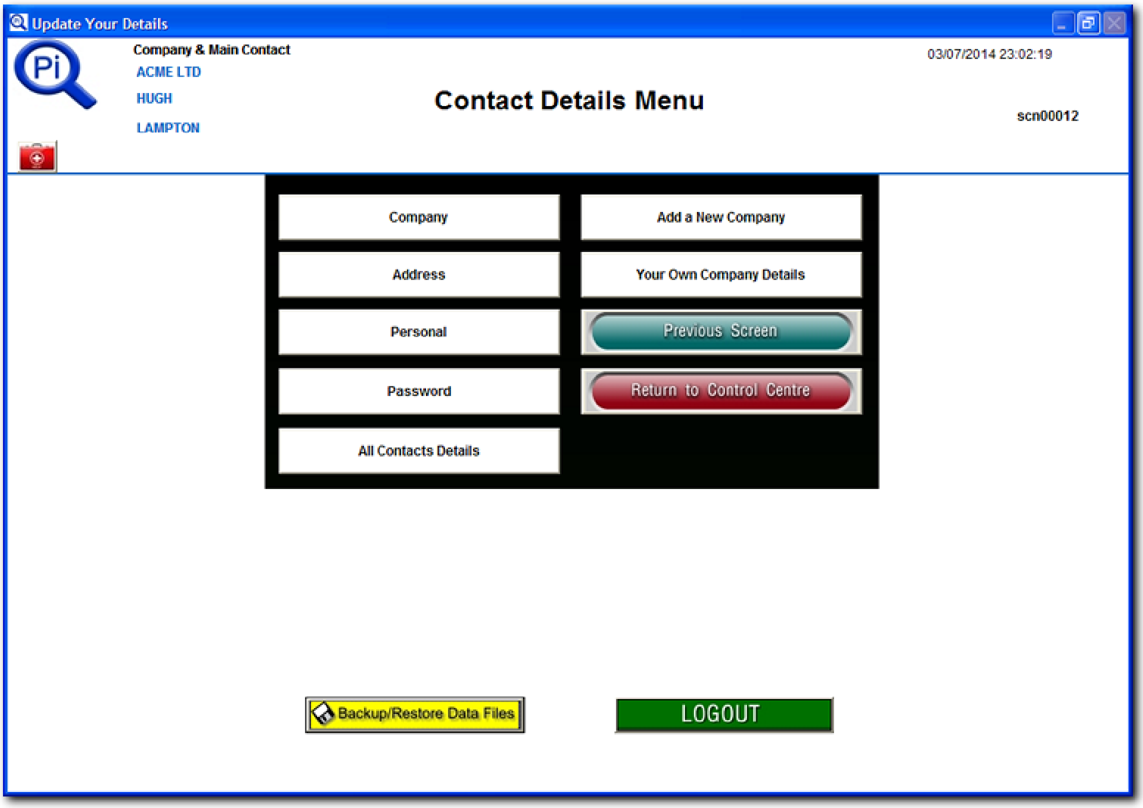
Training Courses Allows maintenance of training course details
Departmental Training Matrix Allows you to identify relevant courses for each department
New IC Questions Allows the text of the Information Capability questions to be changed
Replace IC Questions Allows the currently selected company's IC questionnaire to be updated with the latest questions
Produce Questionnaires - Generates a full set of Blank Questionnaires that can be printed out if required.
Standard Charges Allows maintenance of Standard Changes for services
VAT Rates Allows VAT (Purchase Tax) maintenance
Exchange Rates Allows maintenance of currency exchange rates
Technology - Accesses the new technology sub menu

Previous screen returns you back to the Add-Ons menu

Backup / Restore Data Files
This gives access to Data File Security options

Pressing the **LOGOUT** button quits from the application

2.43 Contact Details



This menu is accessed from the Account Options Menu Menu and presents you with the following options:

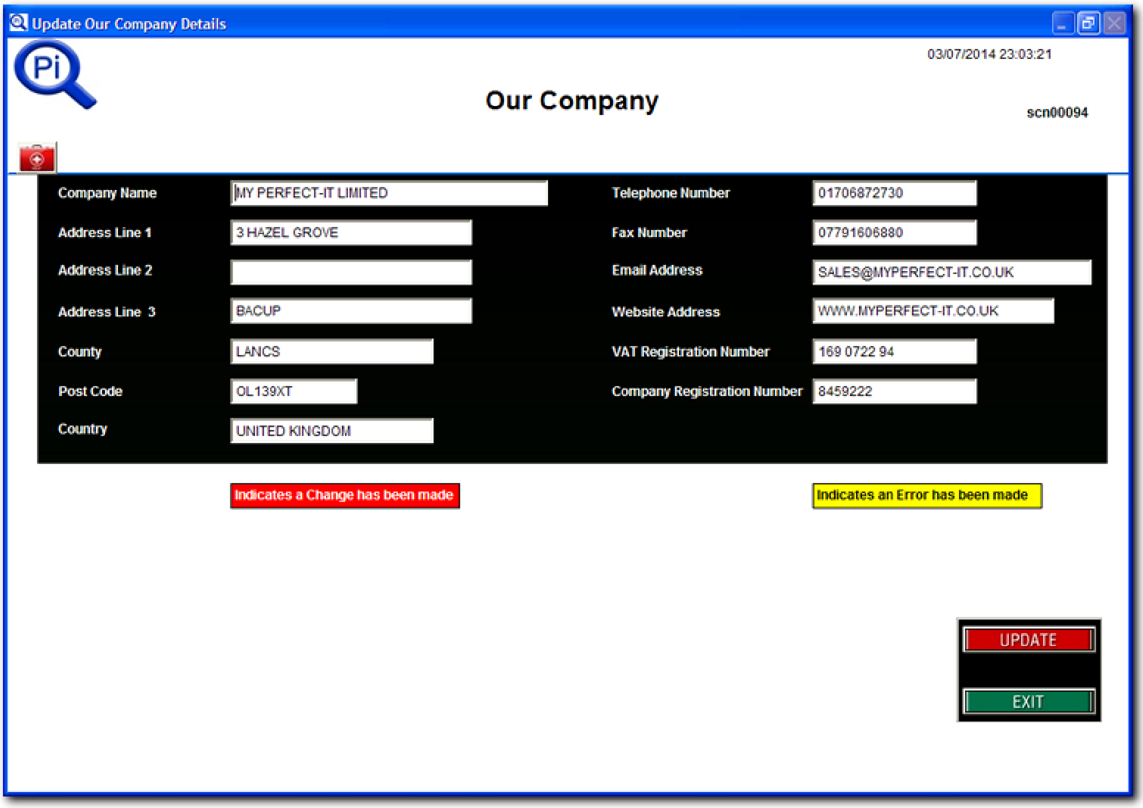
Company Allows Basic Details of company to be updated
Address Allows Company Address Details to be updated
Personal Allows Personal Contact details to be updated
Password Allows Password to be changed
All Contact Details Print or Review Contact Details for All Companies
Add New Company Allows a New Company to be added (Multi-company version only)
Your Company Details Allow Your own Company/Group details to be updated (Multi-company version only)

Previous Screen returns you to the Account Options Menu   How Do I - Account Options Menu

Backup / Restore Data Files
This gives access to Data File Security options

Pressing the **LOGOUT** button quits from the application

2.44 Your Own Company Details



This screen is used for the Maintenance of your own Company details.
In the multi-company PC version these are the details that will appear on client invoices. In the Standalone PC Single Company Version these are the details that will appear on your Purchase Orders.

You can update data in any of the following fields:

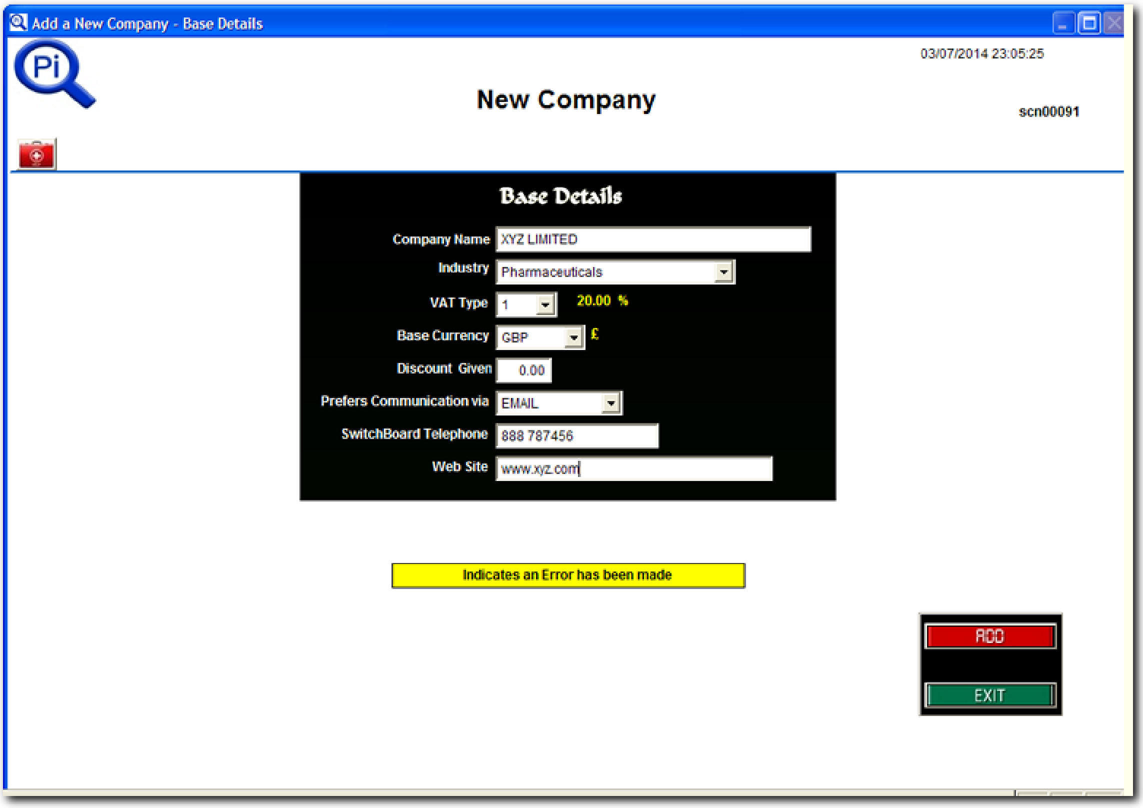
Company Name*
Address line 1*
Address line 2
Address line 3
County*
Post Code*
Country*
Telephone Number*
Fax Number*
Email address*
Website Address*
VAT Registration Number*
Company Registration Number*

* Should any of these be left blank an error message will be generated and the original value is restored to the field.

Once you have made the necessary changes you should click the **“UPDATE”** key and the record will be updated and a message will be displayed indicating success.

Clicking th **EXIT** button returns you to the Contact Details Menu

2.45 Add a New Company



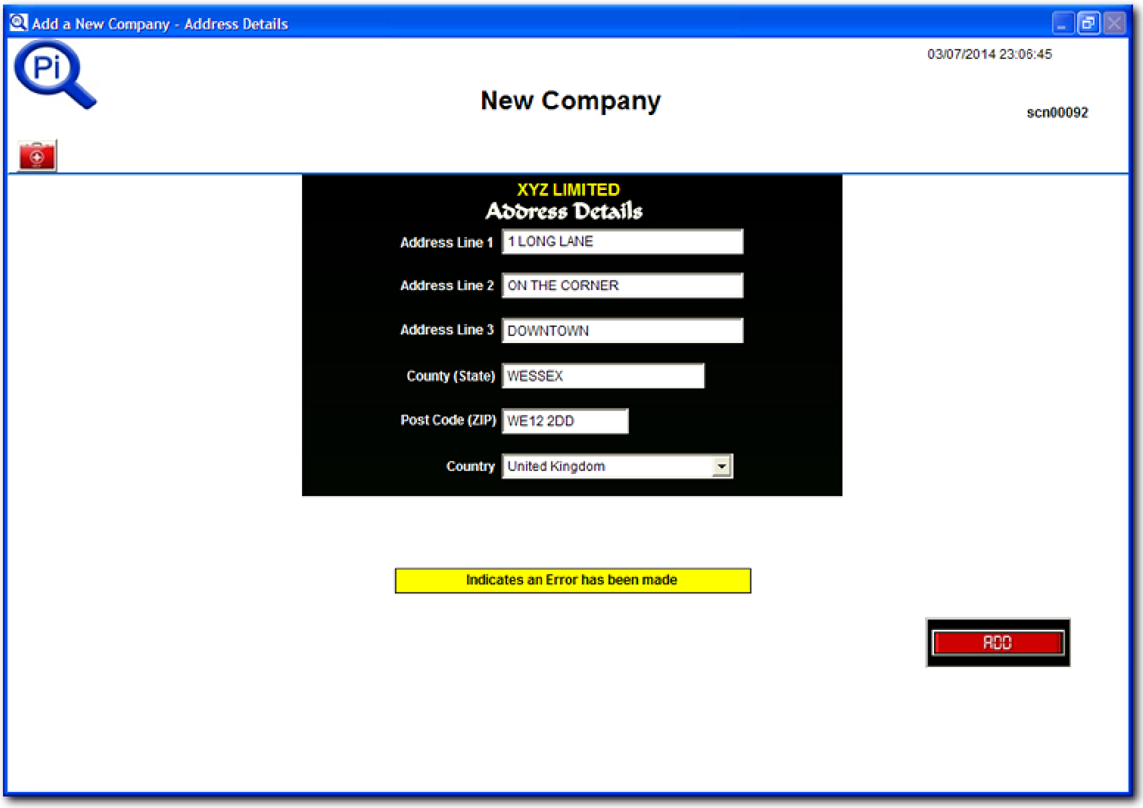
This option allows you to add a new company. This option is ONLY available in the Multi-Company version.

You must enter the Following Details:
COMPANY NAME
INDUSTRY (Selection From Drop Down Selection List)
VAT TYPE (Selection From Drop Down Selection List)
BASE CURRENCY (Selection From Drop Down Selection List)
DISCOUNT GIVEN (If any)
PREFERRED COMMUNICATION METHOD (Selection From Drop Down Selection List)
SWITCHBOARD TELEPHONE NUMBER
WEB SITE ADDRESS

Error checking is performed to ensure all valid inputs have been made and error messages appear if any data is missing.

Clicking th **EXIT** button returns you to the Contact Details Menu

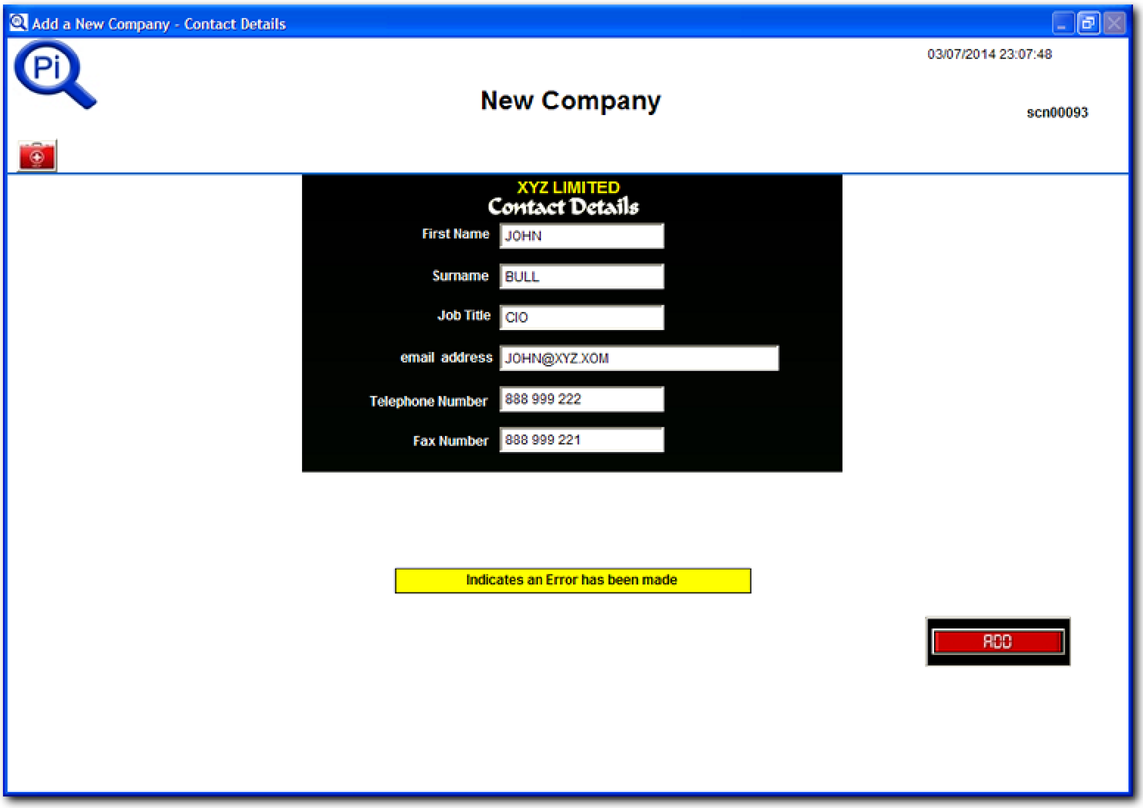
When input is complete you should click the Add button and you are taken to the following screen:



Here you must complete the ADDRESS (Location details) of the new company (User).
The following fields must be completed:
ADDRESS LINE 1 (Mandatory)
ADDRESS LINE 2
ADDRESS LINE 3
COUNTY (STATE)
POST CODE (ZIP) (Mandatory)
COUNTRY(Selection From Drop Down Selection List) (Mandatory)

Error checking is performed to ensure all valid inputs have been made and error messages appear if any data is missing.

When input is complete you should click the Add button and you are taken to the following screen:



Here you must enter details of the main contact at the company. The following fields must be completed:
FIRST NAME (Mandatory)
SURNAME (Mandatory)
JOB TITLE
EMAIL ADDRESS
TELEPHONE NUMBER (Mandatory)
FAX NUMBER

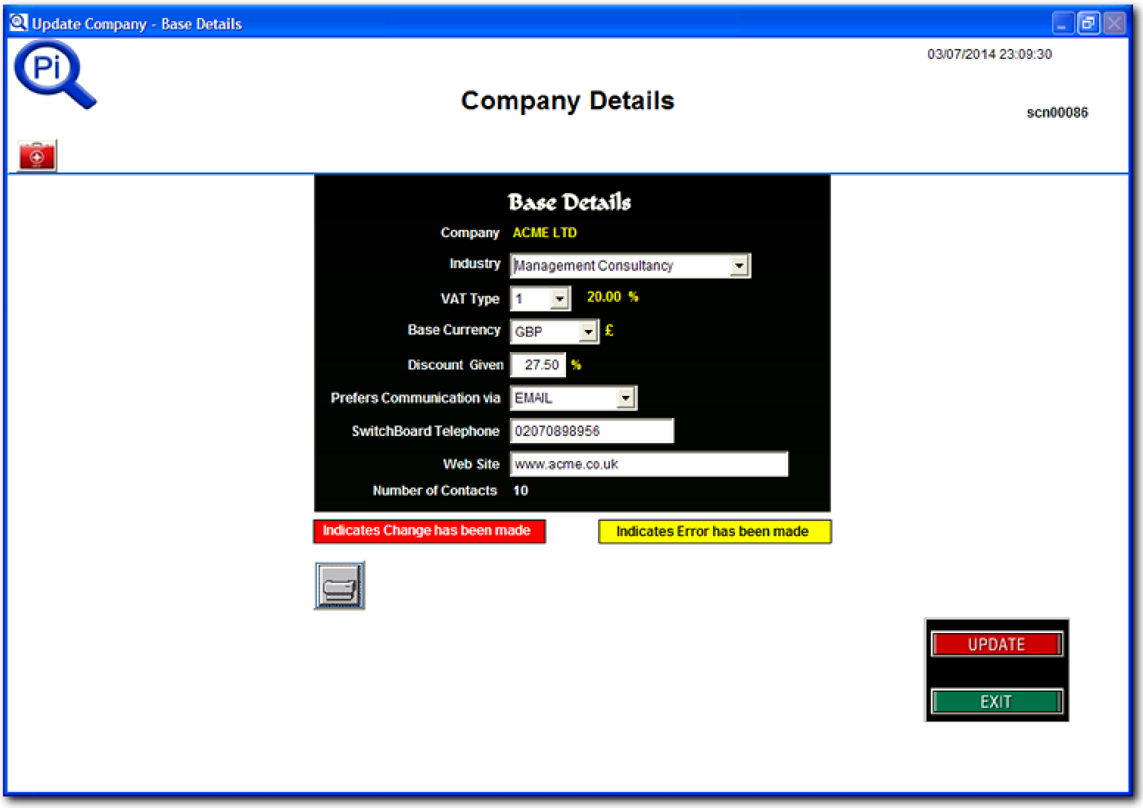
PASSWORD (Mandatory) ** only visible & applicable when setting up YOUR OWN Company

The system will allocate a USER ID ** only visible & applicable when setting up YOUR OWN Company

Error checking is performed to ensure all valid inputs have been made and error messages appear if any data is missing.

When input is complete you should click the **ADD** button and you are returned to the initial screen of the function, where you may add another NEW Company. (** if setting up Your OWN Company you will exit the system.)

2.46 Update Company Base Details



This option allows you to update the base details of the selected company.

You can update the following Details:

INDUSTRY (Selection from Drop down Selection List)
VAT TYPE (Selection from Drop down Selection List)
BASE CURRENCY (Selection from Drop down Selection List)
DISCOUNT GIVEN (If any)
PREFERRED COMMUNICATION METHOD (Selection from Drop down Selection List)
SWITCHBOARD TELEPHONE NUMBER
WEB SITE ADDRESS

The number of Personal Contacts for this company is also shown.

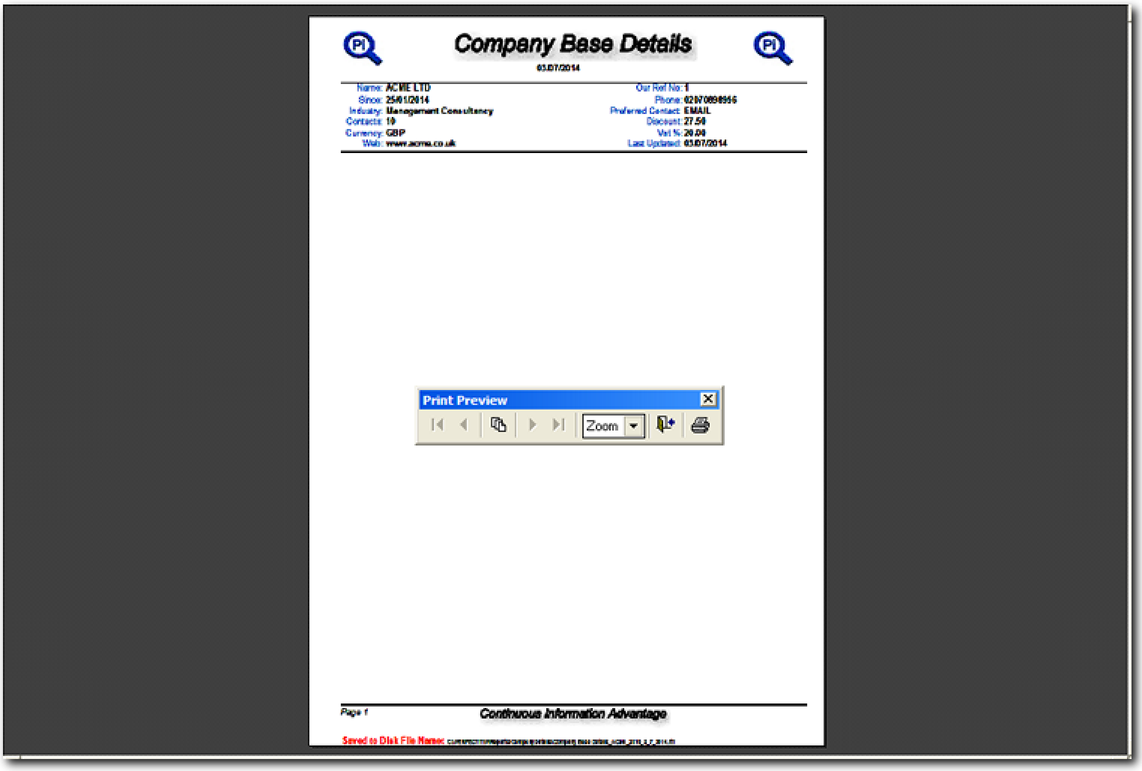
When you have made the changes necessary you should click the **UPDATE** button.

Clicking th **EXIT** button returns you to the Contact Details Menu

A Print Button is located just below the input fields which allows you to produce a report of the selected company's base details.

When the Print button is clicked you are given the option to review the report on screen or to send the output straight to disk in word processor format. (For later review)

An example of this report is below:



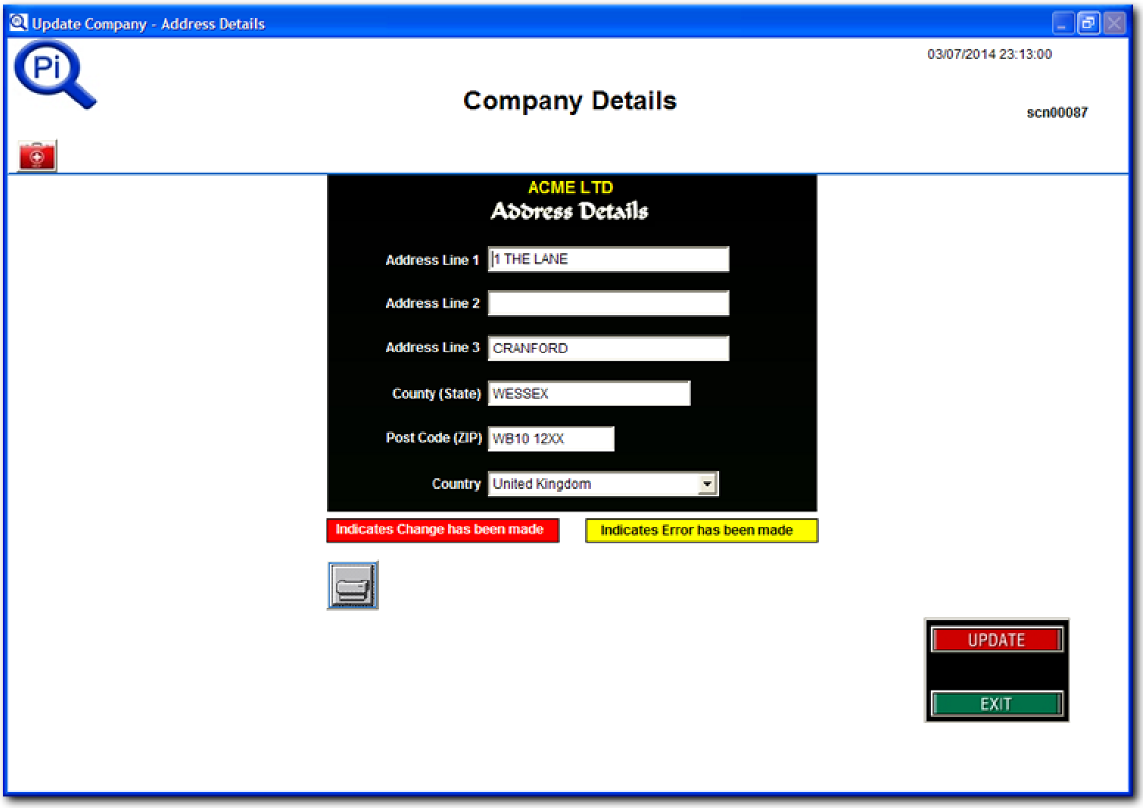
A print preview button is displayed with each report reviewed on screen which allows you to produce a hardcopy of the report on your printer and to move around within the report.

At the foot of the report the location and name of the saved word processor file is displayed.

The location of the file on disk is also displayed in an onscreen informational message when you exit the report or when it has been saved to disk.

Clicking th **EXIT** button returns you to the Contact Details Menu

2.47 Update Company Address Details



Here you can update the ADDRESS (Location details) of the selected company.

The following fields can be updated:

ADDRESS LINE 1 (Mandatory)
ADDRESS LINE 2
ADDRESS LINE 3
COUNTY (STATE) (Mandatory)
POST CODE (ZIP) (Mandatory)
COUNTRY (Selection from Drop Down Selection List) (Mandatory)

When input is complete you should click the **UPDATE** button.

Clicking th **EXIT** button returns you to the Contact Details Menu

A Print Button is located just below the input fields which allows you to produce a report of selected company's address details.

When the Print button is clicked you are given the option to review the report on screen or to send the output straight to disk in word processor format. (For later review)

An example of this report is below:

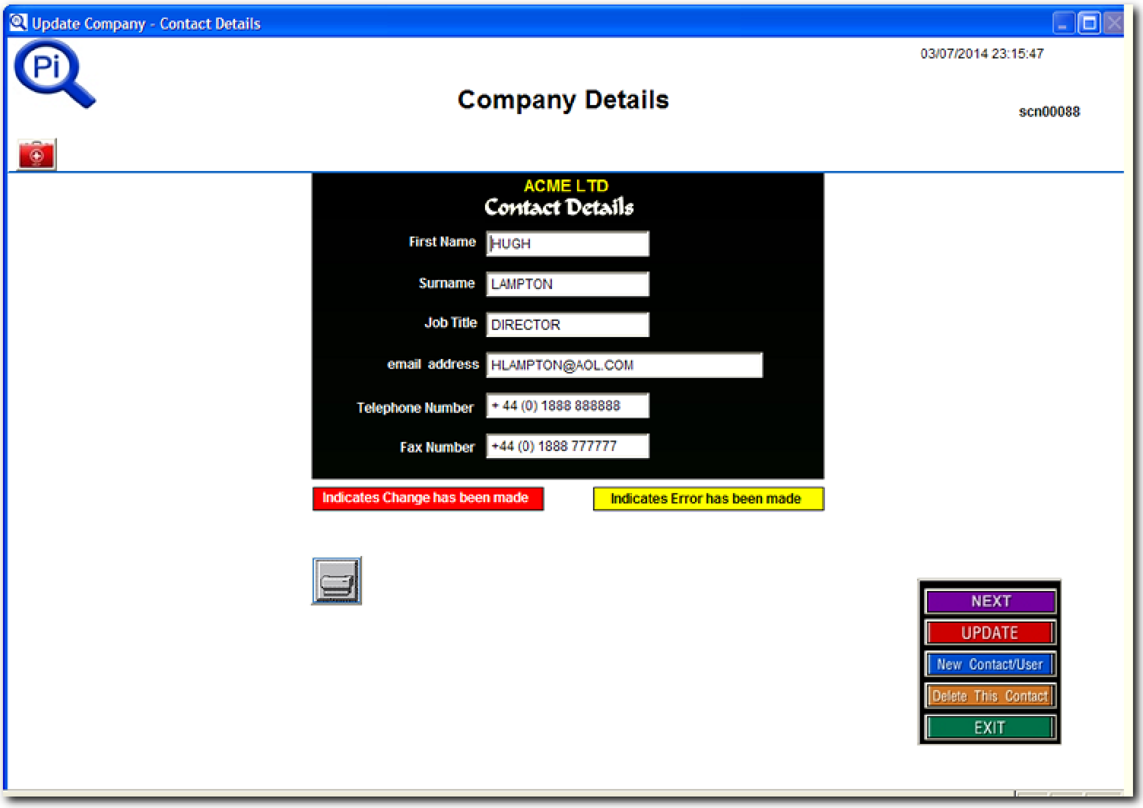
A print preview button is displayed with each report reviewed on screen which allows you to produce a hardcopy of the report on your printer and to move around within the report.

At the foot of the report the location and name of the saved word processor file is displayed.

The location of the file on disk is also displayed in an onscreen informational message when you exit the report or when it has been saved to disk.

Clicking th **EXIT** button returns you to the Contact Details Menu

2.48 Update Company Contacts Details

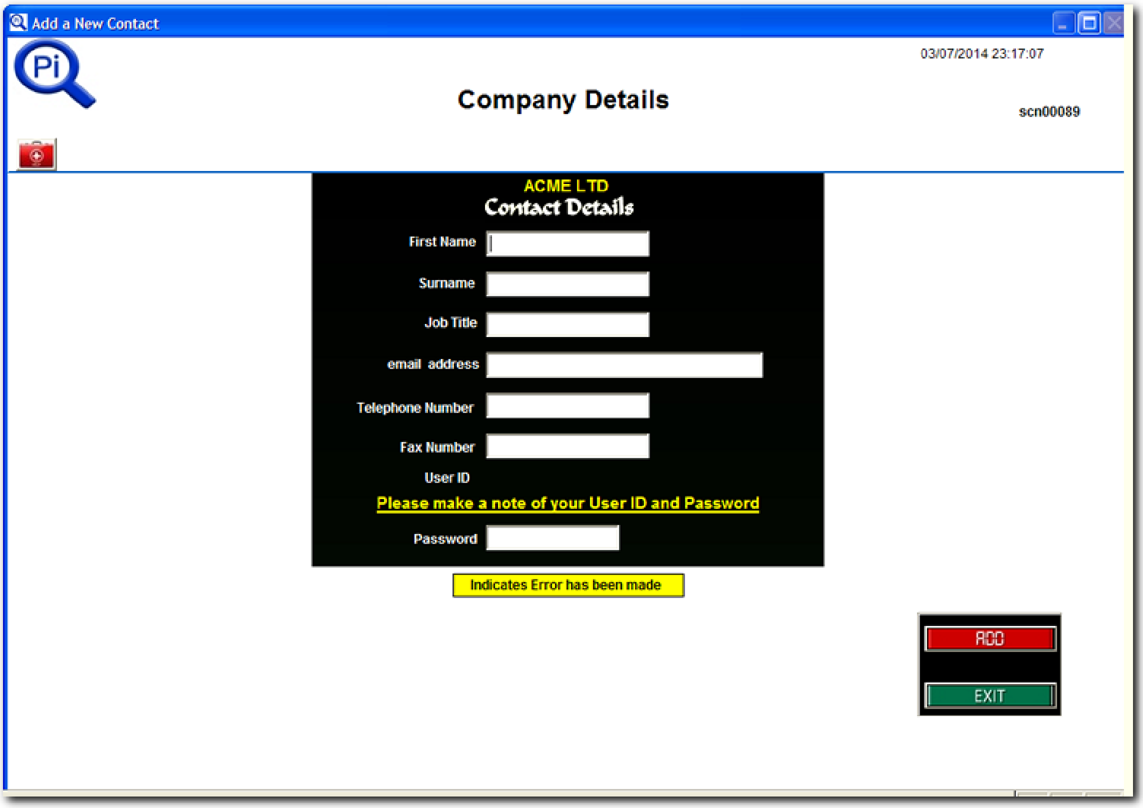


Here you may update the personal contact details for the selected company. The following fields can be updated:
FIRST NAME (Mandatory)
SURNAME (Mandatory)
JOB TITLE
EMAIL ADDRESS
TELEPHONE NUMBER (Mandatory)
FAX NUMBER

When the necessary changes have been made you should click the Update button.

Clicking th **EXIT** button returns you to the Contact Details Menu

If you wish to add a new contact for the selected company you should click the New Contact/User button and the following screen will be displayed:



The following fields must be completed:

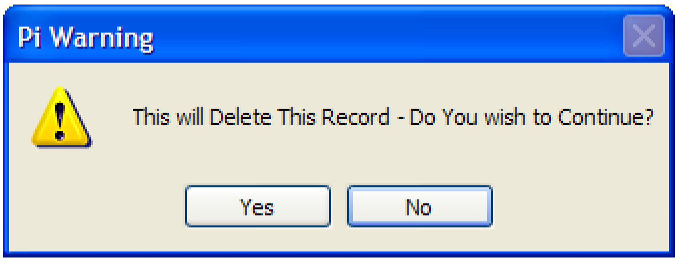
FIRST NAME (Mandatory)
SURNAME (Mandatory)
JOB TITLE
EMAIL ADDRESS
TELEPHONE NUMBER (Mandatory)
FAX NUMBER

Note. If you are adding a new user for your own company the following fields will be displayed and a password must be entered
USER ID *
PASSWORD (Mandatory)
The system will allocate the USER ID

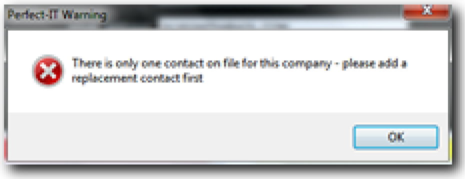
Clicking the **EXIT** Key returns you to the previous screen.

When input is complete you should click the Add button, the new contact is added and you are returned to previous screen.

If you wish to delete a contact you should click the **Delete This Contact** button.



You are asked if you wish to delete the record and on confirmation the record is deleted



*   Note if a company only has one contact on file, the system will inform you of what to do in this case, as deleting is not possible until another contact has been added to file.

A Print Button is located just below the input fields which allows you to produce a report of selected company's contact details.

When the Print button is clicked you are given the option to review the report on screen or to send the output straight to disk in word processor format. (For later review)

An example of this report is below:

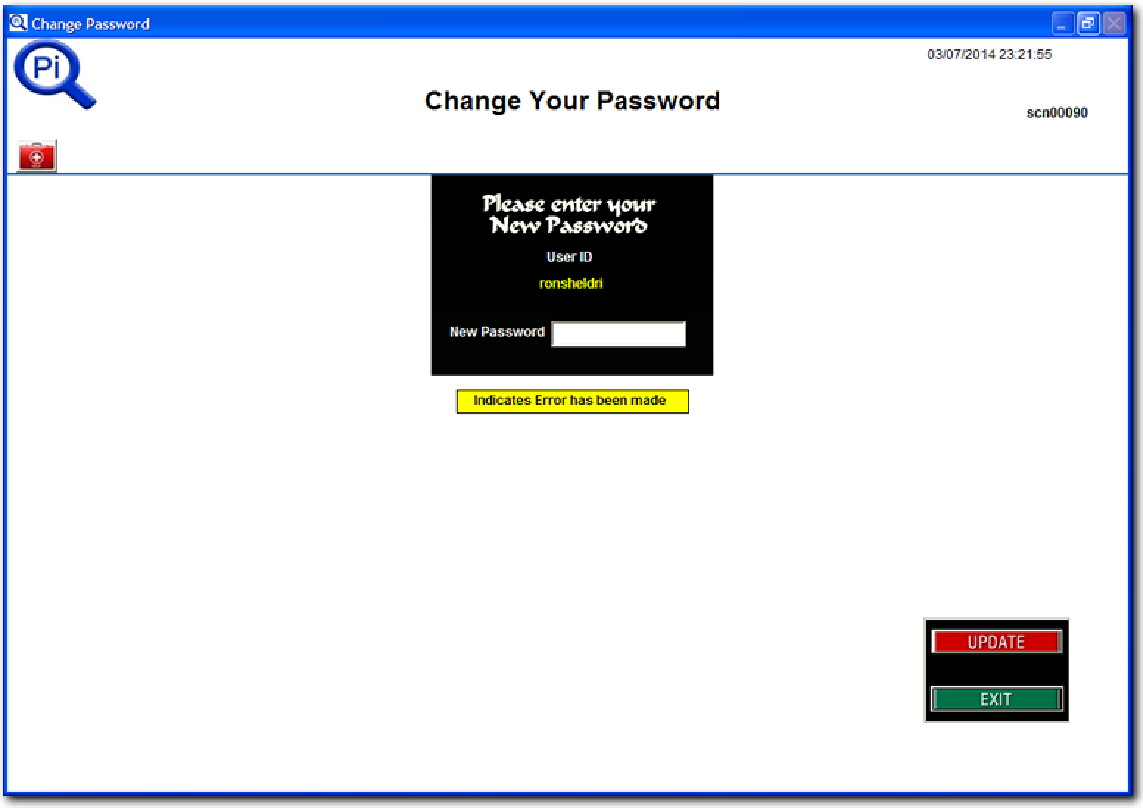
A print preview button is displayed with each report reviewed on screen which allows you to produce a hardcopy of the report on your printer and to move around within the report.

At the foot of the report the location and name of the saved word processor file is displayed.

The location of the file on disk is also displayed in an onscreen informational message when you exit the report or when it has been saved to disk.

Clicking th **EXIT** button returns you to the Contact Details Menu

2.49 Change Sign-on Password



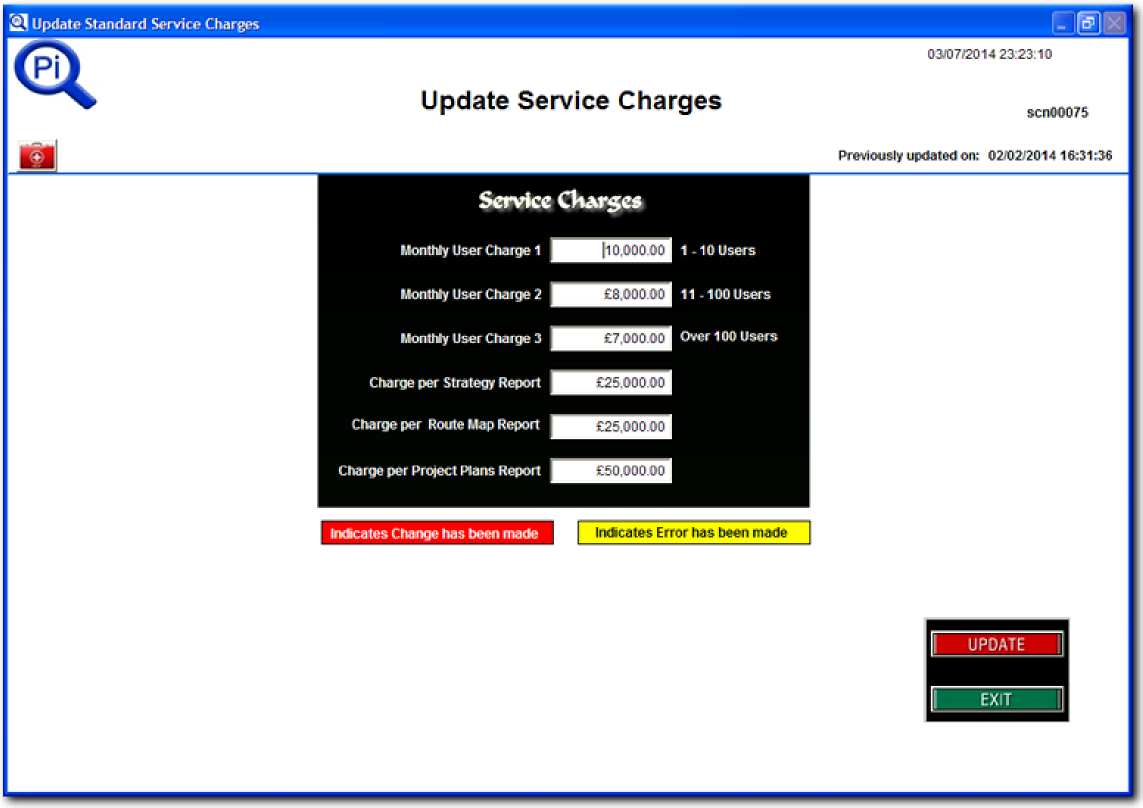
Here you may change your password. Passwords must be at least **7** characters long.

Error checking is performed to ensure all valid input has been made and error messages appear if any data is invalid.

Once the new password has been entered you should click the **UPDATE** button.

Clicking th **EXIT** button returns you to the Contact Details Menu

2.50 Update Standard Charges

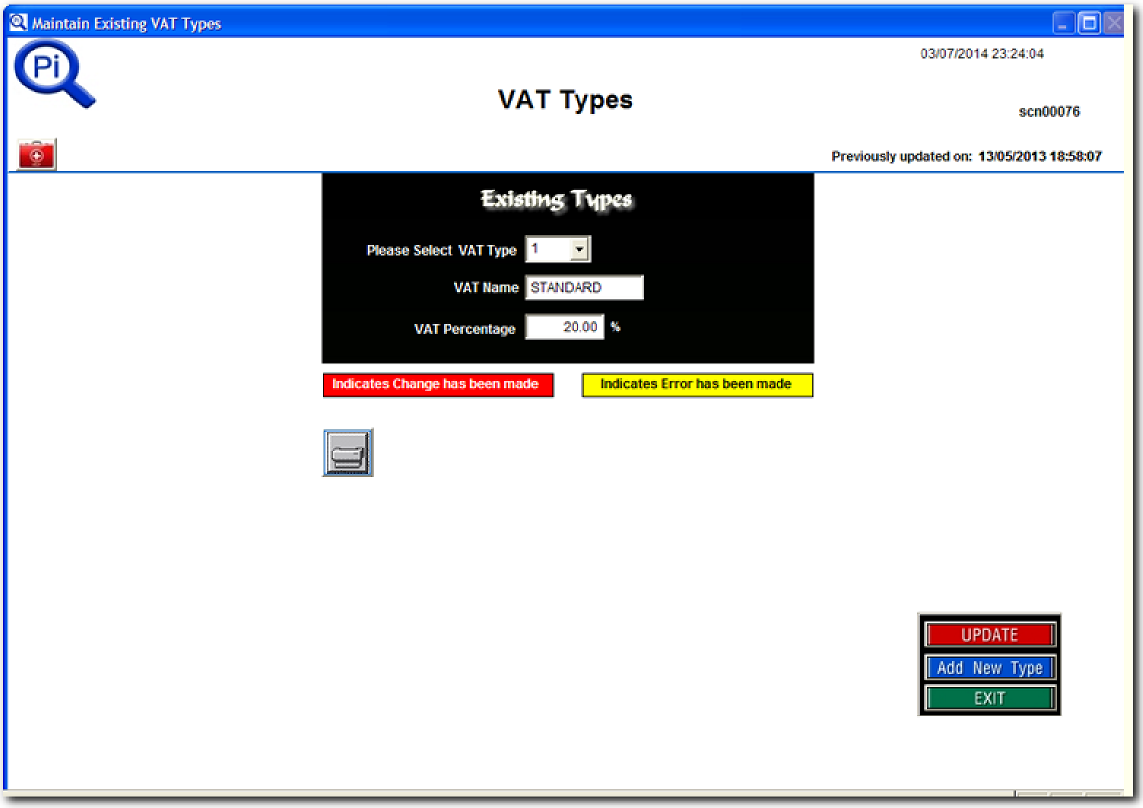


Here you may maintain the Standard service charges of the system.
You may update the following values:

Monthly User Charge 1 - 1 -10 Users
Monthly User Charge 2 - 11 -100 Users
Monthly User Charge 3 - Over 100 Users
Charge per Strategy Report
Charge per Route Map Report
Charge per Project Plans Report

When the necessary updates have been made you should click the Update button.
Clicking th **EXIT** button returns you to the File Maintenance Menu

2.51 Maintain VAT (Purchase Tax) Types



This is the screen for maintaining VAT Types and percentages.

You should select the VAT Type you require by use of a drop-down list.

You may then update the fields:

VAT Name
VAT Percentage

If changes are made to these fields the background will change to RED to indicate a change is being made against the original value in the field

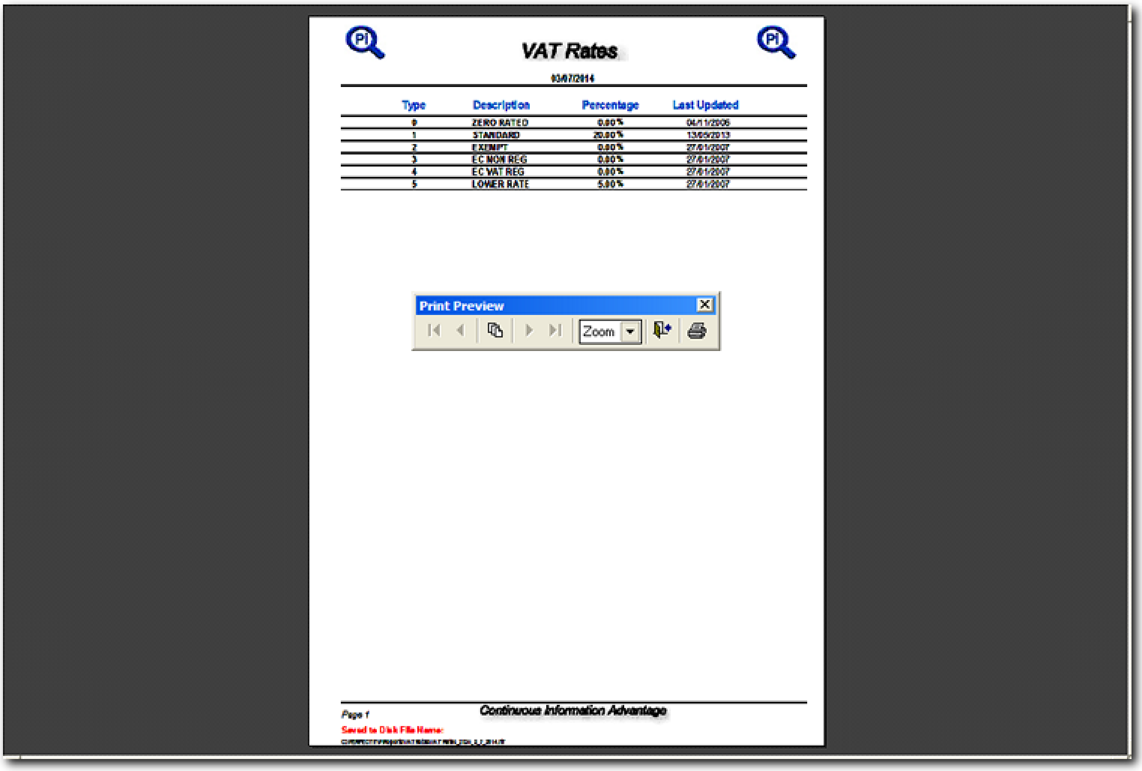
The date/time of the previous change to the record are also displayed.

When you have finished making the required changes you should press the Update key and the record will be updated and a message indicating success will be displayed.

A Print Button is located just below the input fields which allows you to produce a report of the VAT rates currently on file.

When the Print button is clicked you are given the option to review the report on screen or to send the output straight to disk in word processor format. (For later review)

An example of this report is below:



A print preview button is displayed with each report reviewed on screen which allows you to produce a hardcopy of the report on your printer and to move around within the report.

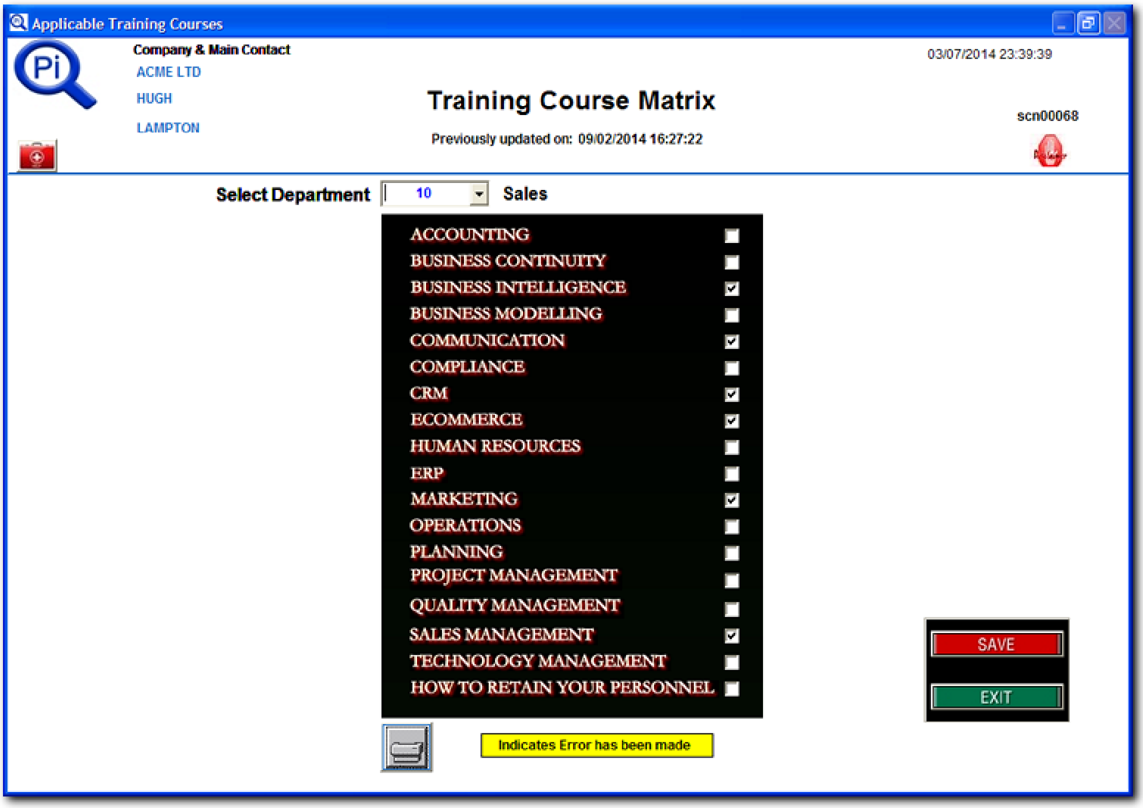
At the foot of the report the location and name of the saved word processor file is displayed.

The location of the file on disk is also displayed in an informational message when you exit the report or when it has been saved to disk.

If you wish to add a new VAT Type you should click the Add New Type button.

Clicking th **EXIT** button returns you to the File Maintenance Menu

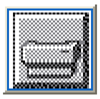
2.52 Maintain Departmental Training Matrix



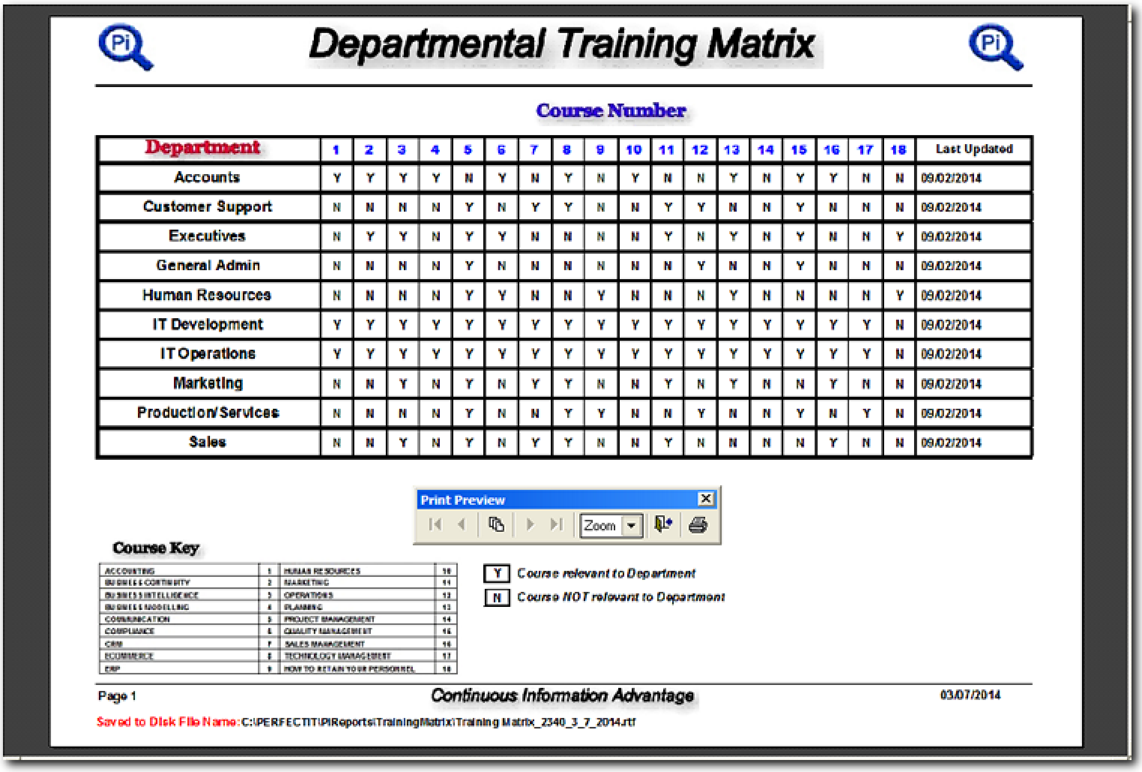
This option allows you to maintain the Departmental Training Matrix. Basically this matrix defines which training courses are applicable to each department.

The department can be selected by use of a drop down selection list. Once a department has been selected you may indicate which training courses are appropriate for the department by clicking (placing a tick) in the related tick box.

To update the record you should click the **SAVE** button. Clicking th **EXIT** button returns you to the File Maintenance Menu



Below the Matrix is a Printer icon which allows you to print a copy(report) of the Training Matrix. An example of the report is below: The system also save a copy of the report to disk in rtf format. This can be reviewed by use of the Reports saved to disk function.



Departmental Training Matrix

Course Number

Department	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	Last Updated
Accounts	Y	Y	Y	Y	N	Y	N	Y	N	Y	N	N	Y	N	Y	Y	N	N	09/02/2014
Customer Support	N	N	N	N	Y	N	Y	Y	N	N	Y	Y	N	N	Y	N	N	N	09/02/2014
Executives	N	Y	Y	N	Y	Y	N	N	N	N	Y	N	Y	N	Y	N	N	Y	09/02/2014
General Admin	N	N	N	N	Y	N	N	N	N	N	N	Y	N	N	Y	N	N	N	09/02/2014
Human Resources	N	N	N	N	Y	Y	N	N	Y	N	N	N	Y	N	N	N	N	Y	09/02/2014
IT Development	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	09/02/2014
IT Operations	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	09/02/2014
Marketing	N	N	Y	N	Y	N	Y	Y	N	N	Y	N	Y	N	N	Y	N	N	09/02/2014
Production/Services	N	N	N	N	Y	N	N	Y	Y	N	N	Y	N	N	Y	N	Y	N	09/02/2014
Sales	N	N	Y	N	Y	N	Y	Y	N	N	Y	N	N	N	N	Y	N	N	09/02/2014

Print Preview

Zoom

Course Key

ACCOUNTING	1	HUMAN RESOURCES	10
BUSINESS CONTINUITY	2	MARKETING	11
BUSINESS INTELLIGENCE	3	OPERATIONS	12
BUSINESS MODELLING	4	PLANNING	13
COMMUNICATION	5	PROJECT MANAGEMENT	14
COMPLIANCE	6	QUALITY MANAGEMENT	15
CRM	7	SALES MANAGEMENT	16
ECOMMERCE	8	TECHNOLOGY MANAGEMENT	17
ERP	9	HOW TO RETAIN YOUR PERSONNEL	18

Y Course relevant to Department

N Course NOT relevant to Department

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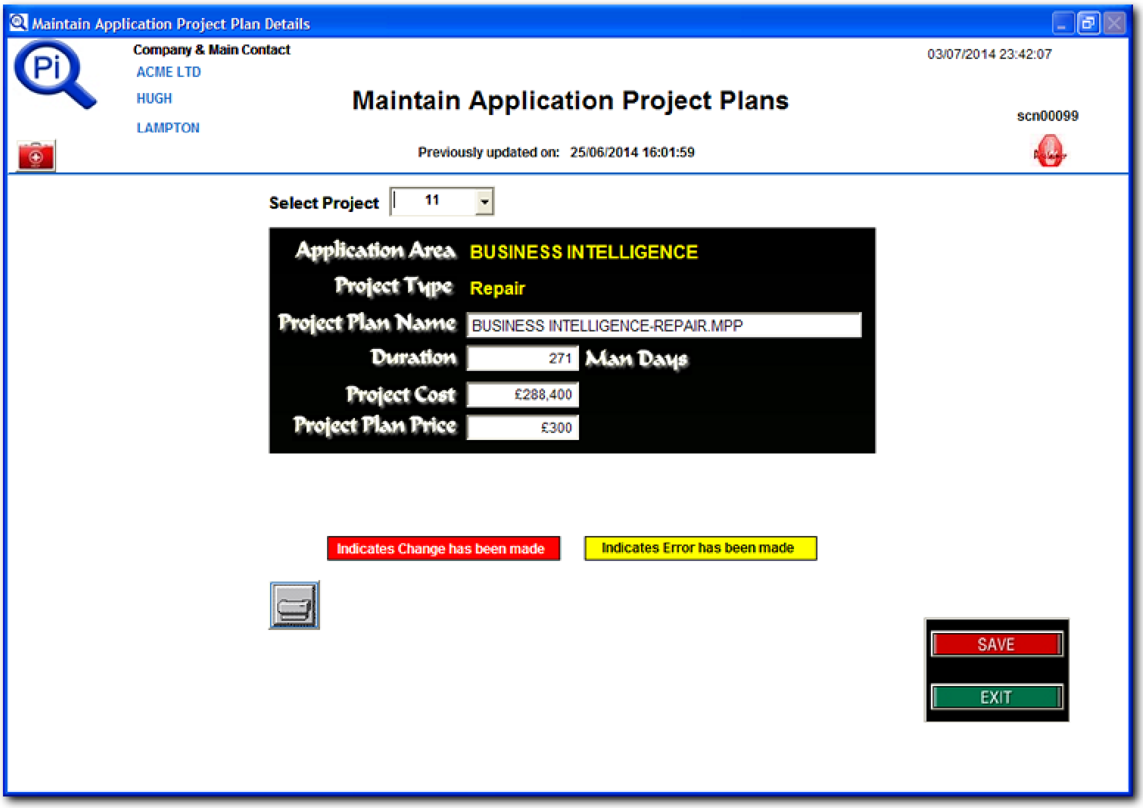
Saved to Disk File Name:C:\PERFECTIT\PiReports\TrainingMatrix\Training Matrix_2340_3_7_2014.rtf

2.53 Maintain Application Project Plans



This option allows you to update the details of Application Project Plans.

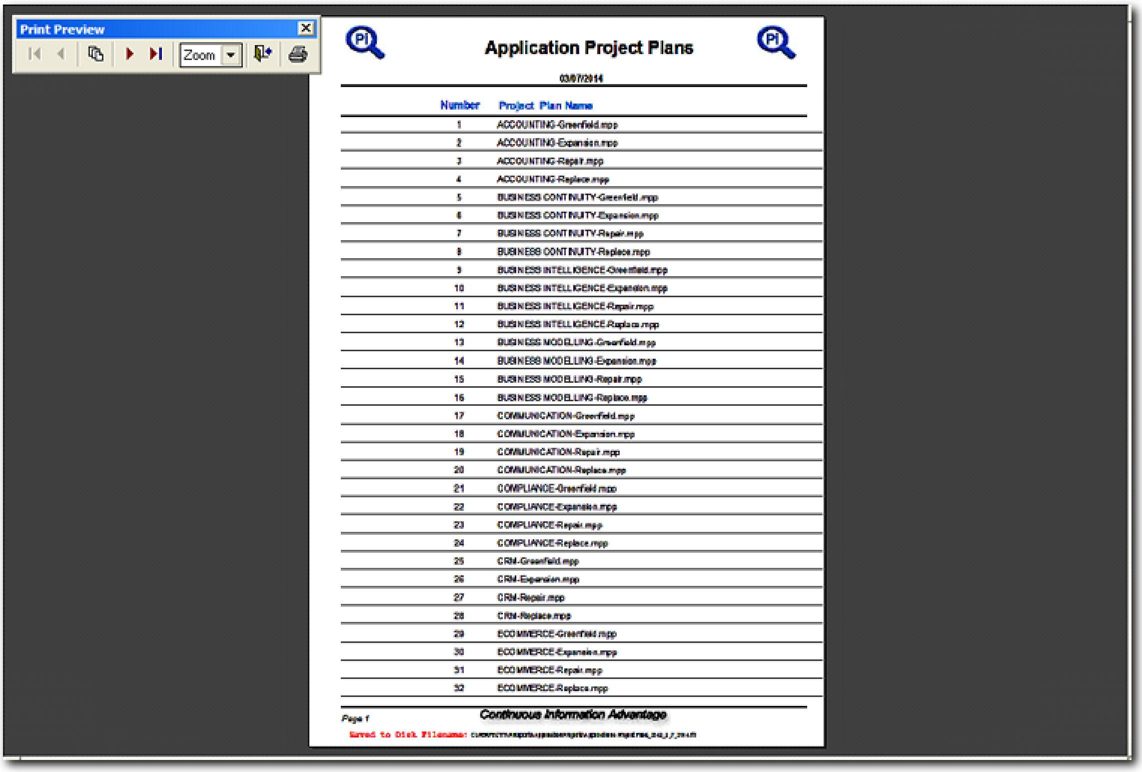
You must first select the Project by use of a drop down menu. You may then update the values of the following:

PROJECT PLAN FILE NAME (e.g. the MS PROJECT name)
DURATION (MAN DAYS)
PROJECT COST
PROJECT PLAN PRICE

If any changes are made the related background colour will change to **RED** to indicate that the original value is being changed.

If any errors are made the related background colour will change to **YELLOW** and an information message will appear detailing what the error is.

Below the questions is a Print Button which allows you to print a copy of the Application Project Files available.Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk



Application Project Plans

03/07/2014

Number	Project Plan Name
1	ACCOUNTING-Greenfield.mpp
2	ACCOUNTING-Expansion.mpp
3	ACCOUNTING-Repair.mpp
4	ACCOUNTING-Replace.mpp
5	BUSINESS CONTINUITY-Greenfield.mpp
6	BUSINESS CONTINUITY-Expansion.mpp
7	BUSINESS CONTINUITY-Repair.mpp
8	BUSINESS CONTINUITY-Replace.mpp
9	BUSINESS INTELLIGENCE-Greenfield.mpp
10	BUSINESS INTELLIGENCE-Expansion.mpp
11	BUSINESS INTELLIGENCE-Repair.mpp
12	BUSINESS INTELLIGENCE-Replace.mpp
13	BUSINESS MODELLING-Greenfield.mpp
14	BUSINESS MODELLING-Expansion.mpp
15	BUSINESS MODELLING-Repair.mpp
16	BUSINESS MODELLING-Replace.mpp
17	COMMUNICATION-Greenfield.mpp
18	COMMUNICATION-Expansion.mpp
19	COMMUNICATION-Repair.mpp
20	COMMUNICATION-Replace.mpp
21	COMPLIANCE-Greenfield.mpp
22	COMPLIANCE-Expansion.mpp
23	COMPLIANCE-Repair.mpp
24	COMPLIANCE-Replace.mpp
25	CRM-Greenfield.mpp
26	CRM-Expansion.mpp
27	CRM-Repair.mpp
28	CRM-Replace.mpp
29	ECOMMERCE-Greenfield.mpp
30	ECOMMERCE-Expansion.mpp
31	ECOMMERCE-Repair.mpp
32	ECOMMERCE-Replace.mpp

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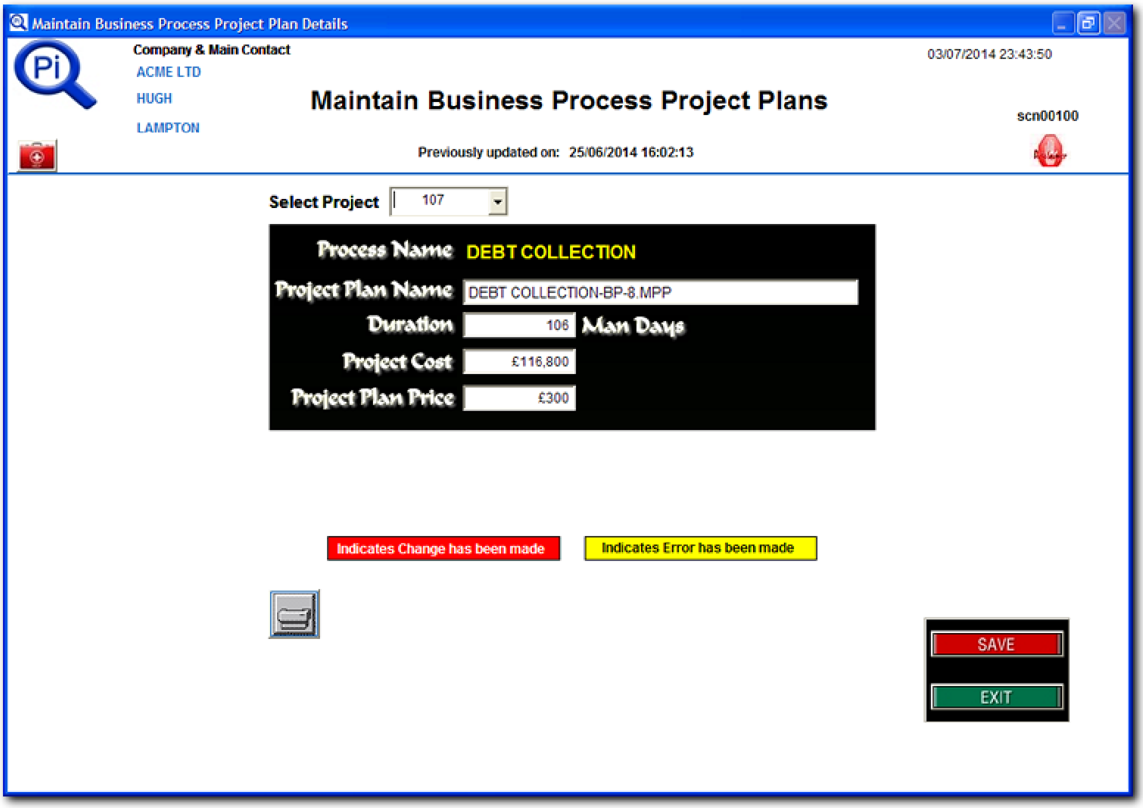
Saved to Disk Filename:

When the necessary changes have been made you should click the **SAVE** button.

Clicking th **EXIT** button returns you to the Project Plans Menu

2.54 Maintain Business Process Project Plans



This option allows you to update the details of Business Process Project Plans.

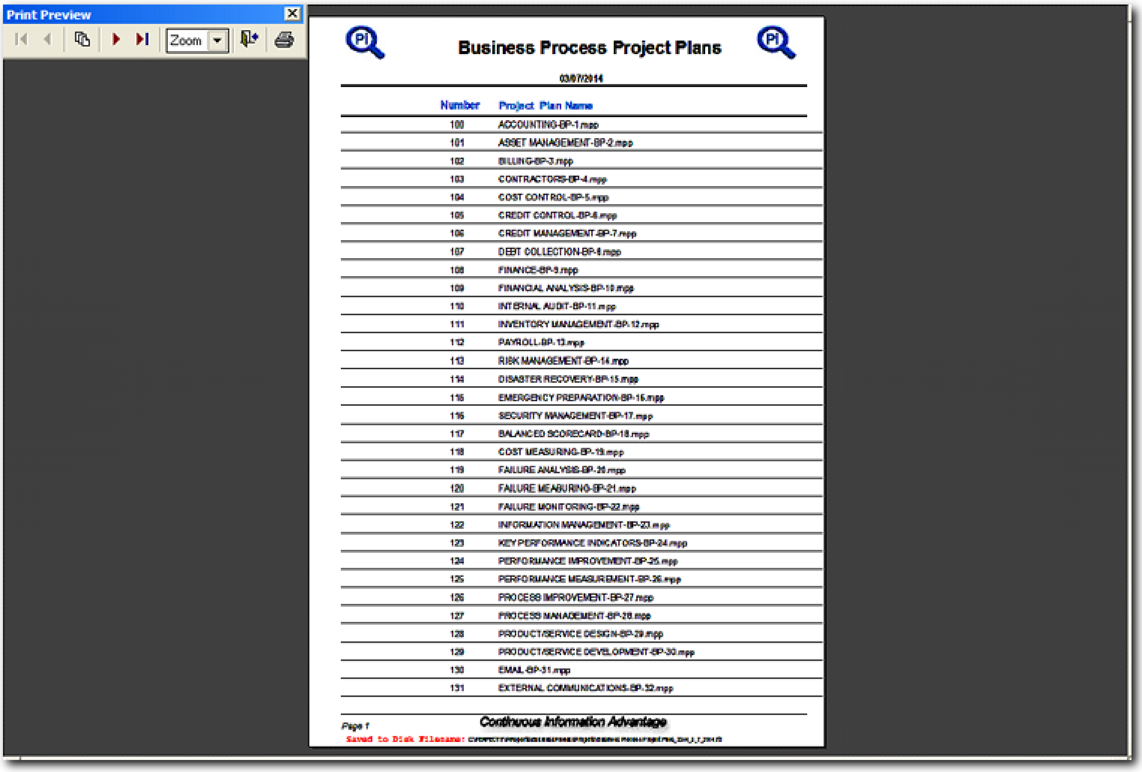
You must first select the Project by use of a drop down menu. They may then update the values of the following:

PROJECT PLAN FILE NAME (e.g. the MS PROJECT name)
DURATION (MAN DAYS)
PROJECT COST
PROJECT PLAN PRICE

If any changes are made the related background colour will change to **RED** to indicate that the original value is being changed.

If any errors are made the related background colour will change to **YELLOW** and an information message will appear detailing what the error is.

Below the questions is a Print Button which allows you to print a copy of the Business Process Project Files available.Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk



Business Process Project Plans

03/07/2014

Number	Project Plan Name
100	ACCOUNTING-BP-1.mpp
101	ASSET MANAGEMENT-BP-2.mpp
102	BILLING-BP-3.mpp
103	CONTRACTORS-BP-4.mpp
104	COST CONTROL-BP-5.mpp
105	CREDIT CONTROL-BP-6.mpp
106	CREDIT MANAGEMENT-BP-7.mpp
107	DEBT COLLECTION-BP-8.mpp
108	FINANCE-BP-9.mpp
109	FINANCIAL ANALYSIS-BP-10.mpp
110	INTERNAL AUDIT-BP-11.mpp
111	INVENTORY MANAGEMENT-BP-12.mpp
112	PAYROLL-BP-13.mpp
113	RISK MANAGEMENT-BP-14.mpp
114	DISASTER RECOVERY-BP-15.mpp
115	EMERGENCY PREPARATION-BP-16.mpp
116	SECURITY MANAGEMENT-BP-17.mpp
117	BALANCED SCORECARD-BP-18.mpp
118	COST MEASURING-BP-19.mpp
119	FAILURE ANALYSIS-BP-20.mpp
120	FAILURE MEASURING-BP-21.mpp
121	FAILURE MONITORING-BP-22.mpp
122	INFORMATION MANAGEMENT-BP-23.mpp
123	KEY PERFORMANCE INDICATORS-BP-24.mpp
124	PERFORMANCE IMPROVEMENT-BP-25.mpp
125	PERFORMANCE MEASUREMENT-BP-26.mpp
126	PROCESS IMPROVEMENT-BP-27.mpp
127	PROCESS MANAGEMENT-BP-28.mpp
128	PRODUCT/SERVICE DESIGN-BP-29.mpp
129	PRODUCT/SERVICE DEVELOPMENT-BP-30.mpp
130	EMAIL-BP-31.mpp
131	EXTERNAL COMMUNICATIONS-BP-32.mpp

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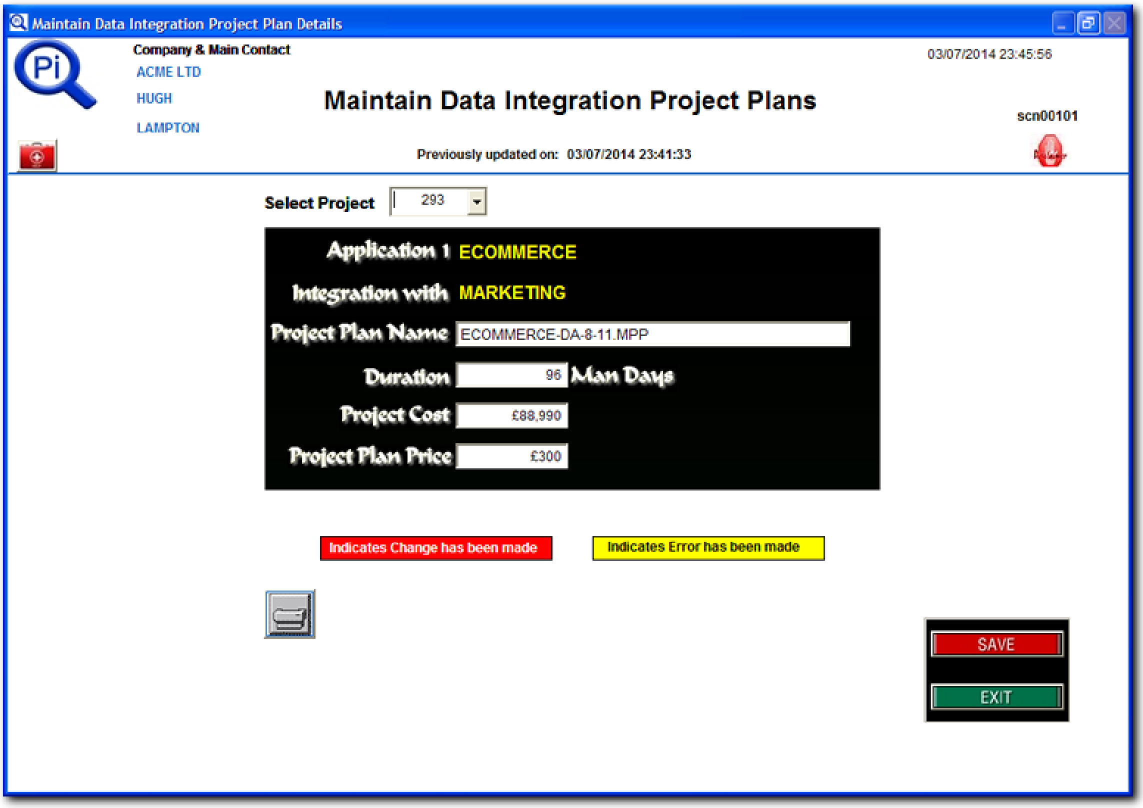
When the necessary changes have been made you should click the **SAVE** button.

Clicking th **EXIT** button returns you to the Project Plans Menu

2.55 Maintain Data Integration Project Plans



This option allows you to update the details of Data Integration Project Plans.

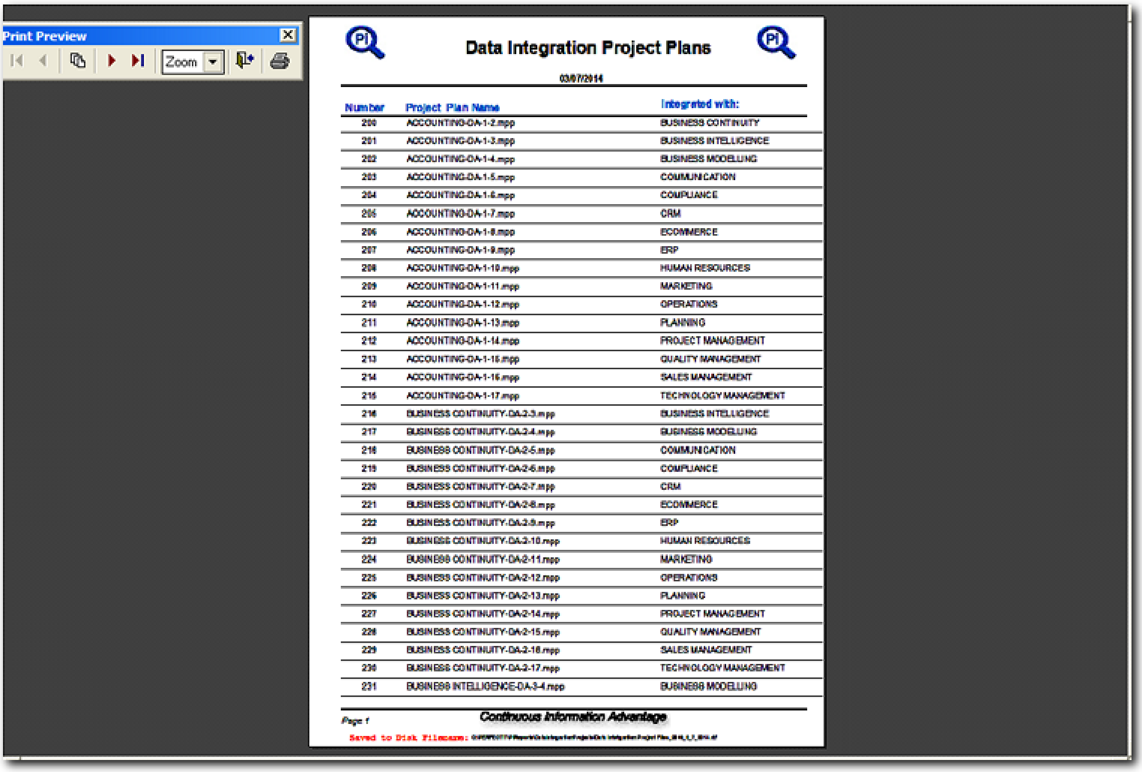
You must first select the Project by use of a drop down menu. They may then update the values of the following:

PROJECT PLAN FILE NAME (e.g. the MS PROJECT name)
DURATION (MAN DAYS)
PROJECT COST
PROJECT PLAN PRICE

If any changes are made the related background colour will change to **RED** to indicate that the original value is being changed.

If any errors are made the related background colour will change to **YELLOW** and an information message will appear detailing what the error is.

Below the questions is a Print Button which allows you to print a copy of the Data Integration Project Files available.Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk



Data Integration Project Plans

03/07/2014

Number	Project Plan Name	Integrated with:
200	ACCOUNTING-DA-1-2.mpp	BUSINESS CONTINUITY
201	ACCOUNTING-DA-1-3.mpp	BUSINESS INTELLIGENCE
202	ACCOUNTING-DA-1-4.mpp	BUSINESS MODELLING
203	ACCOUNTING-DA-1-5.mpp	COMMUNICATION
204	ACCOUNTING-DA-1-6.mpp	COMPLIANCE
205	ACCOUNTING-DA-1-7.mpp	CRM
206	ACCOUNTING-DA-1-8.mpp	ECOMMERCE
207	ACCOUNTING-DA-1-9.mpp	ERP
208	ACCOUNTING-DA-1-10.mpp	HUMAN RESOURCES
209	ACCOUNTING-DA-1-11.mpp	MARKETING
210	ACCOUNTING-DA-1-12.mpp	OPERATIONS
211	ACCOUNTING-DA-1-13.mpp	PLANNING
212	ACCOUNTING-DA-1-14.mpp	PROJECT MANAGEMENT
213	ACCOUNTING-DA-1-15.mpp	QUALITY MANAGEMENT
214	ACCOUNTING-DA-1-16.mpp	SALES MANAGEMENT
215	ACCOUNTING-DA-1-17.mpp	TECHNOLOGY MANAGEMENT
216	BUSINESS CONTINUITY-DA-2-3.mpp	BUSINESS INTELLIGENCE
217	BUSINESS CONTINUITY-DA-2-4.mpp	BUSINESS MODELLING
218	BUSINESS CONTINUITY-DA-2-5.mpp	COMMUNICATION
219	BUSINESS CONTINUITY-DA-2-6.mpp	COMPLIANCE
220	BUSINESS CONTINUITY-DA-2-7.mpp	CRM
221	BUSINESS CONTINUITY-DA-2-8.mpp	ECOMMERCE
222	BUSINESS CONTINUITY-DA-2-9.mpp	ERP
223	BUSINESS CONTINUITY-DA-2-10.mpp	HUMAN RESOURCES
224	BUSINESS CONTINUITY-DA-2-11.mpp	MARKETING
225	BUSINESS CONTINUITY-DA-2-12.mpp	OPERATIONS
226	BUSINESS CONTINUITY-DA-2-13.mpp	PLANNING
227	BUSINESS CONTINUITY-DA-2-14.mpp	PROJECT MANAGEMENT
228	BUSINESS CONTINUITY-DA-2-15.mpp	QUALITY MANAGEMENT
229	BUSINESS CONTINUITY-DA-2-16.mpp	SALES MANAGEMENT
230	BUSINESS CONTINUITY-DA-2-17.mpp	TECHNOLOGY MANAGEMENT
231	BUSINESS INTELLIGENCE-DA-3-4.mpp	BUSINESS MODELLING

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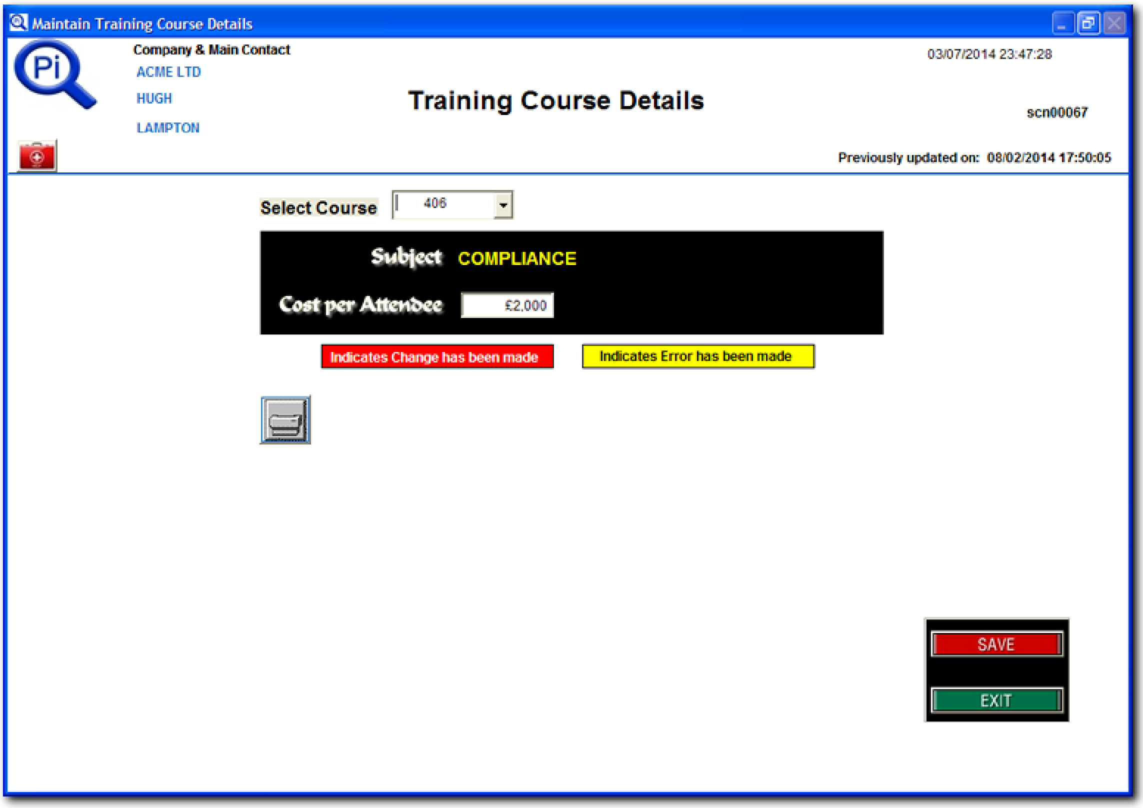
When the necessary changes have been made you should click the **SAVE** button.

Clicking th **EXIT** button returns you to the Project Plans Menu

2.56 Maintain Training Course Details



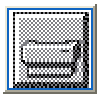
This option allows you to update the details of Training Courses.

You must first select the Course by use of a drop down menu. You may then update the **COST PER ATTENDEE** value.

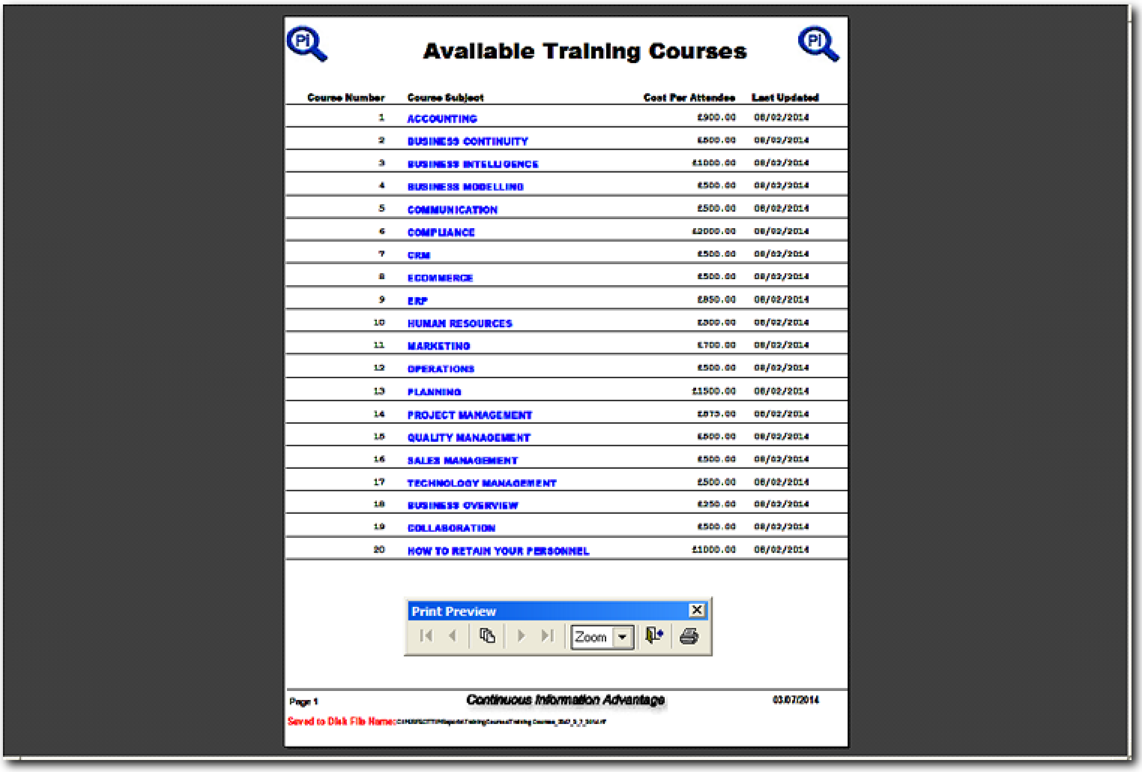
If any changes are made the related background colour will change to **RED** to indicate that the original value has being changed.

If any errors are made the related background colour will change to **YELLOW** and an information message will appear detailing what the error is.

When the necessary changes have been made you should click the **SAVE** button.



There is a printer icon on screen and clicking this will produce a report of the Training courses available an example is shown below. The system also saves a copy of this report to disk in rtf format and this can be viewed by use of the Reports saved to disk function



Available Training Courses

Course Number	Course Subject	Cost Per Attendee	Last Updated
1	ACCOUNTING	£900.00	08/02/2014
2	BUSINESS CONTINUITY	£600.00	08/02/2014
3	BUSINESS INTELLIGENCE	£1000.00	08/02/2014
4	BUSINESS MODELLING	£500.00	08/02/2014
5	COMMUNICATION	£500.00	08/02/2014
6	COMPLIANCE	£2000.00	08/02/2014
7	CRM	£500.00	08/02/2014
8	ECOMMERCE	£500.00	08/02/2014
9	ERP	£850.00	08/02/2014
10	HUMAN RESOURCES	£300.00	08/02/2014
11	MARKETING	£700.00	08/02/2014
12	OPERATIONS	£500.00	08/02/2014
13	PLANNING	£1500.00	08/02/2014
14	PROJECT MANAGEMENT	£875.00	08/02/2014
15	QUALITY MANAGEMENT	£600.00	08/02/2014
16	SALES MANAGEMENT	£500.00	08/02/2014
17	TECHNOLOGY MANAGEMENT	£500.00	08/02/2014
18	BUSINESS OVERVIEW	£250.00	08/02/2014
19	COLLABORATION	£500.00	08/02/2014
20	HOW TO RETAIN YOUR PERSONNEL	£1000.00	08/02/2014

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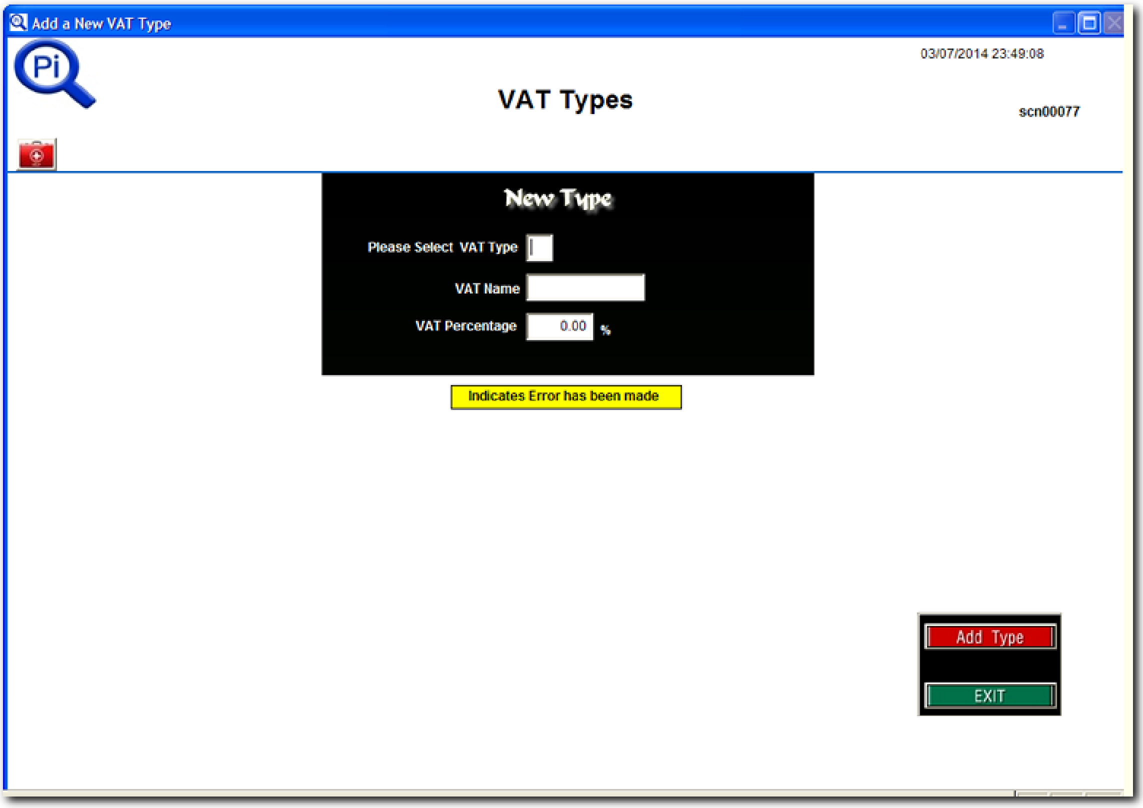
Saved to Disk File Name:

Clicking th **EXIT** button returns you to the File Maintenance Menu

2.57 Add a New VAT (Purchase Tax) Type



This is the screen for adding a New VAT type.

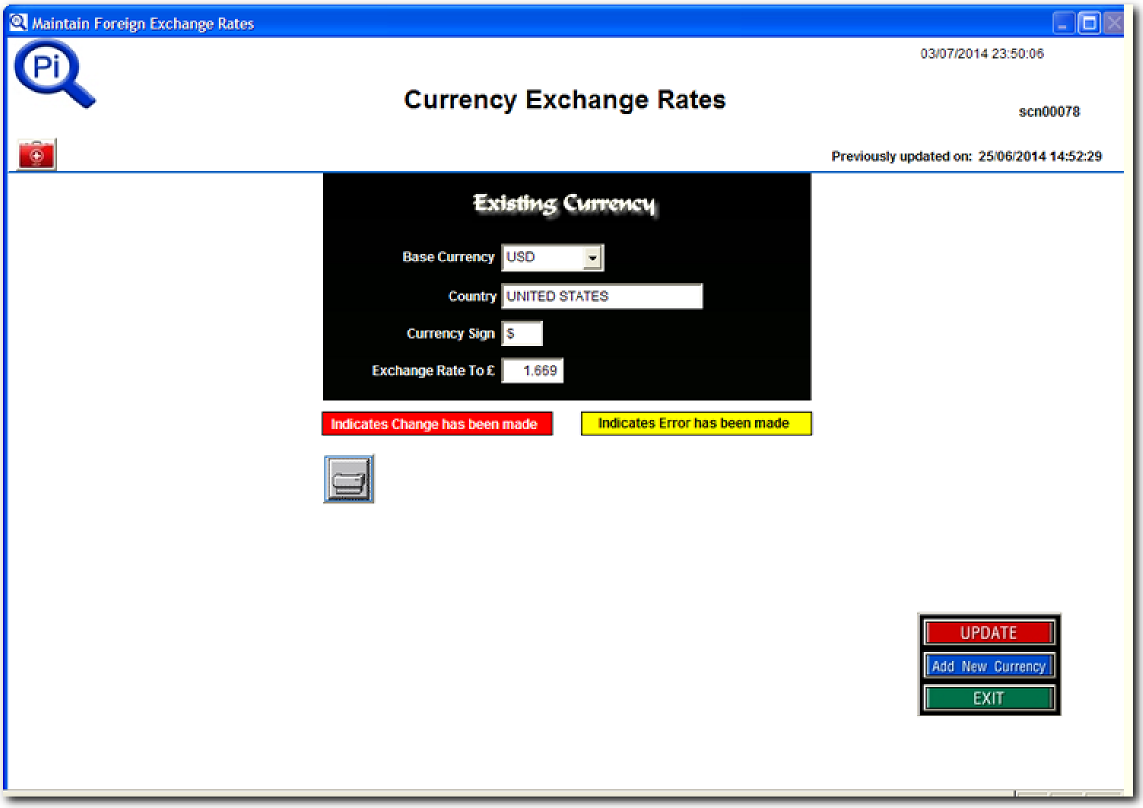
You must enter information into the following fields:

VAT Type (Single number or Letter)
VAT NAME (10 Character Descriptive Name)
VAT Percentage

When you have completed entry you should click the **Add Type** button and the record is added and a message indicating success is displayed.

Clicking th **EXIT** button returns you to the Maintain VAT (Purchase Tax) Types screen

2.58 Maintain Currency Exchange Rates



This screen is used to maintain Foreign currency exchange rates against GBP and is only used within the multi company versions of Pi.

You must first select the currency abbreviation you wish to edit by use of a drop-down list:

You may then make changes to the following fields.

Country
Currency Sign (e.g.' £')
Exchange Rate to Pounds Sterling

If a value in these fields is changed the field background will turn RED to indicate that the value has changed from the original.

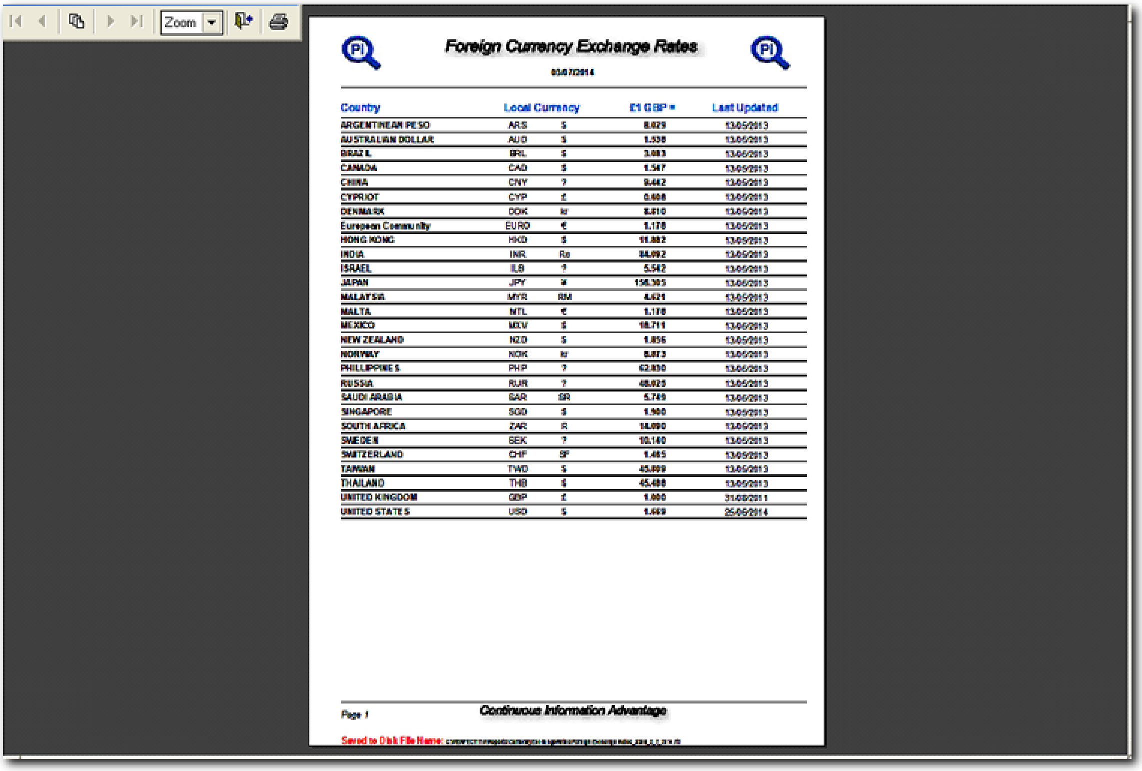
The date/time of the last change to the record are also displayed.

When you have finished making the required changes you should click the Update key and the record will be updated and a message indicating success will be displayed.

A Print Button is located just below the input fields, which allows you to produce a report of the currency exchange rates currently on file.

When the Print button is clicked you are given the option to review the report on screen or to send the output straight to disk in word processor format. (For later review)

An example of this report is below:



Foreign Currency Exchange Rates

03/07/2014

Country	Local Currency		£1 GBP =	Last Updated
ARGENTINEAN PESO	ARS	$	8.029	13/05/2013
AUSTRALIAN DOLLAR	AUD	$	1.538	13/05/2013
BRAZIL	BRL	$	3.083	13/05/2013
CANADA	CAD	$	1.547	13/05/2013
CHINA	CNY	?	9.442	13/05/2013
CYPRIOT	CYP	£	0.808	13/05/2013
DENMARK	DKK	kr	8.810	13/05/2013
European Community	EURO	€	1.178	13/05/2013
HONG KONG	HKD	$	11.882	13/05/2013
INDIA	INR	Rs	84.092	13/05/2013
ISRAEL	ILS	?	5.542	13/05/2013
JAPAN	JPY	¥	156.305	13/05/2013
MALAYSIA	MYR	RM	4.621	13/05/2013
MALTA	MTL	€	1.178	13/05/2013
MEXICO	MXV	$	18.711	13/05/2013
NEW ZEALAND	NZD	$	1.856	13/05/2013
NORWAY	NOK	kr	8.873	13/05/2013
PHILLIPPINES	PHP	?	62.830	13/05/2013
RUSSIA	RUR	?	48.025	13/05/2013
SAUDI ARABIA	SAR	SR	5.749	13/05/2013
SINGAPORE	SGD	$	1.900	13/05/2013
SOUTH AFRICA	ZAR	R	14.090	13/05/2013
SWEDEN	SEK	?	10.140	13/05/2013
SWITZERLAND	CHF	SF	1.465	13/05/2013
TAIWAN	TWD	$	45.809	13/05/2013
THAILAND	THB	$	45.488	13/05/2013
UNITED KINGDOM	GBP	£	1.000	31/08/2011
UNITED STATES	USD	$	1.669	25/06/2014

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Saved to Disk File Name:

A print preview button is displayed with each report reviewed on screen which allows you to produce a hardcopy of the report on your printer and to move around within the report.

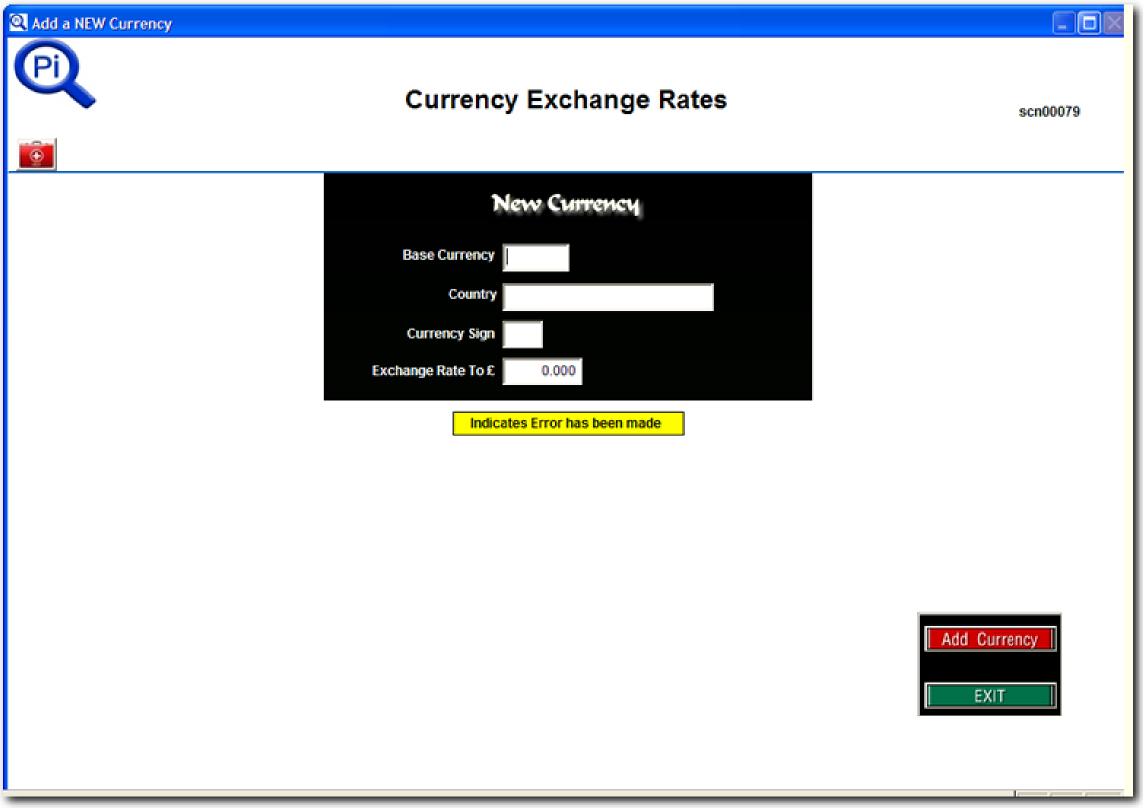
At the foot of the report the location and name of the saved word processor file is displayed.

The location of the file on disk is also displayed in an informational message when you exit the report or when it has been saved to disk.

If you wish to add a new currency you should click the Add NEW Currency button.

Clicking th **EXIT** button returns you to the File Maintenance Menu

2.59 Add a NEW Currency



This screen is for adding a new Currency

You must enter the required details in the following fields:

Currency Abbreviation (e.g. GBP)
Country
Currency Sign (e.g.' £')
Exchange Rate to Pounds Sterling

When you have completed entry you should click the **Add Currency** button and the currency is added and a message indicating success is displayed.

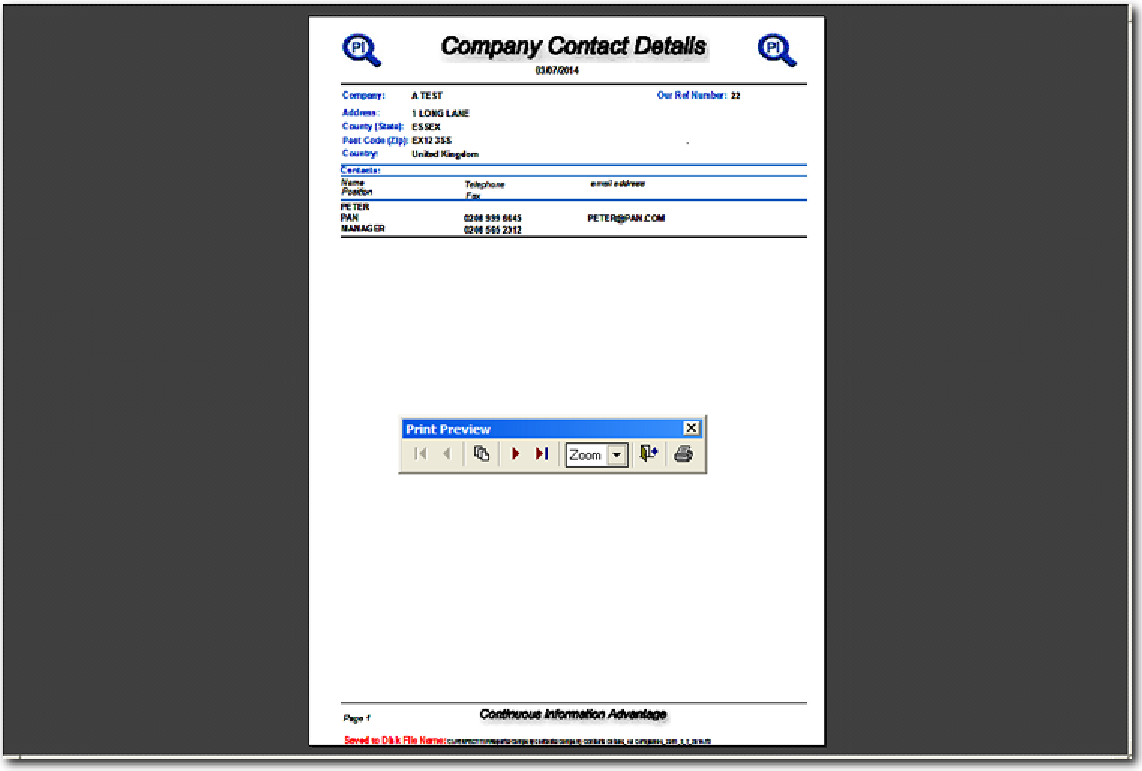
If you wish to exit you should press the EXIT button and you will be returned to the Maintain Currency Exchange Rates screen

2.60 All Contact Details

When this option is selected you are given the option to review the report on screen or to send the output straight to disk in word processor format. (For later review)

The report contains all the Address and Contact details for all Companies.

An example of this report is below:



A print preview button is displayed with each report reviewed on screen which allows you to produce a hardcopy of the report on your printer and to move around within the report.

At the foot of the report the location and name of the saved word processor file is displayed.

The location of the file on disk is also displayed in an informational message when you exit the report or when it has been saved to disk.

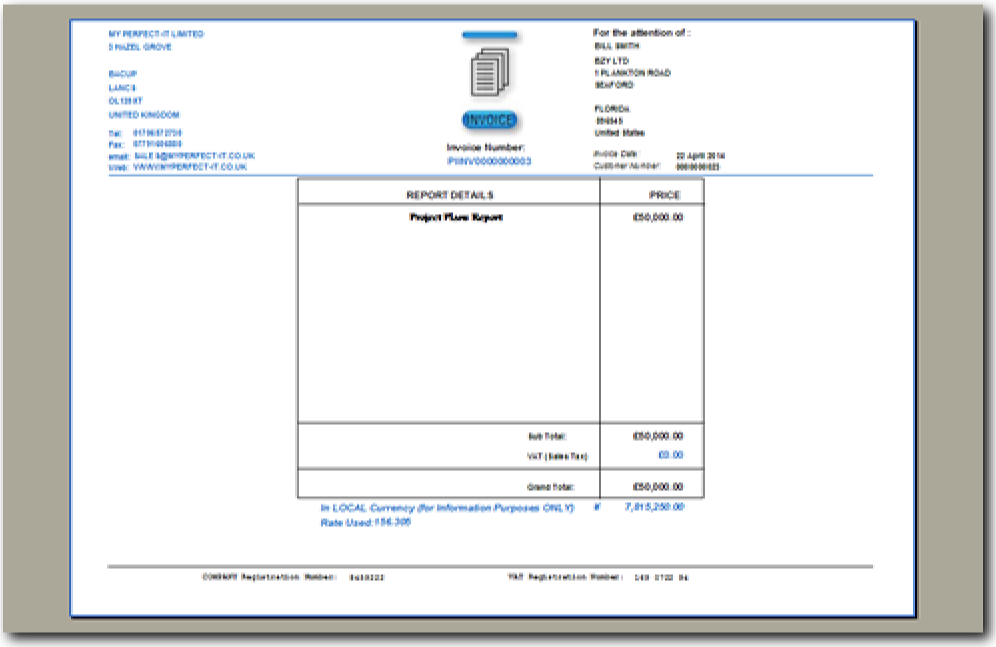
On exiting the report the Contact Details Menu will be re-displayed.

2.61 Invoicing - Multi Company Only

Within the Multi Company version the system will produce an Invoice for the following transactions:

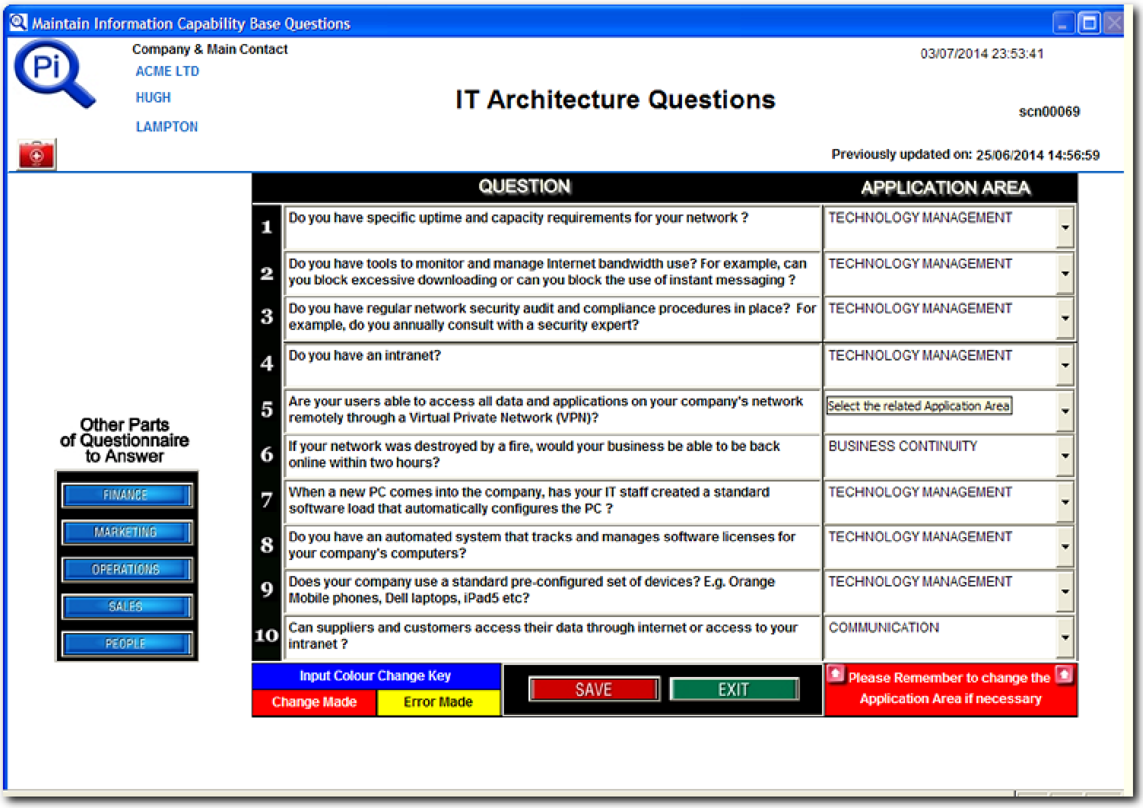
Strategy Report (Invoice is saved to disk in Strategy Full report + All Invoices directories)
Route Map Report (Invoice is saved to disk in Route Map Full report + All Invoices directories)
Project Plans Report (Invoice is saved to disk in Project Plans Full report + All Invoices directories)
Individual Project Plan Purchases (Invoice is saved to disk in Downloaded Project Plans + All Invoices directories)

An example is shown below



Any discounts are shown when applicable and if a non-UK company a conversion to local currency is also shown (*for information purposes only*)

2.62 New IT Architecture Questions



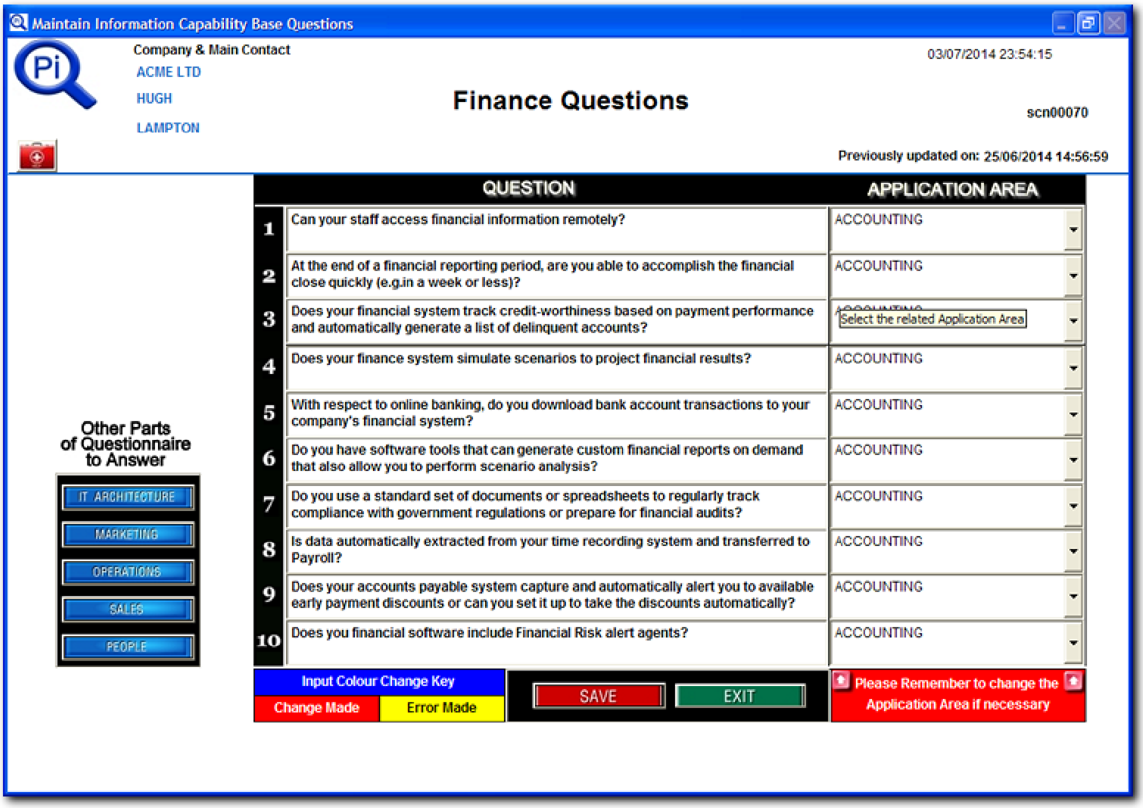
Here you may change the text of the ***Information Capability Questions*** relating to **IT Architecture**. You may edit the text of an existing question or replace it with a completely new question. If necessary you should also change the application Area related to the question, using the drop-down selection list.

When the necessary input is complete you should either click the "**SAVE**" button or one of the Buttons listed under **"Other Parts of this Questionnaire**" to save the input. (You may jump around the questionnaire by use of the buttons located at the left hand side of the screen. Finance Marketing Operations Sales People)

If a change is made to a question the background of the question will turn **RED** to indicate a change is being made. If an error is made in terms of an attempt being made to update with a "blank question" the background of the question will turn **YELLOW and** an error message will appear. An opportunity to reset the question back to its previous content is offered.

Clicking th **EXIT** button returns you to the File Maintenance Menu

2.63 New Finance Questions



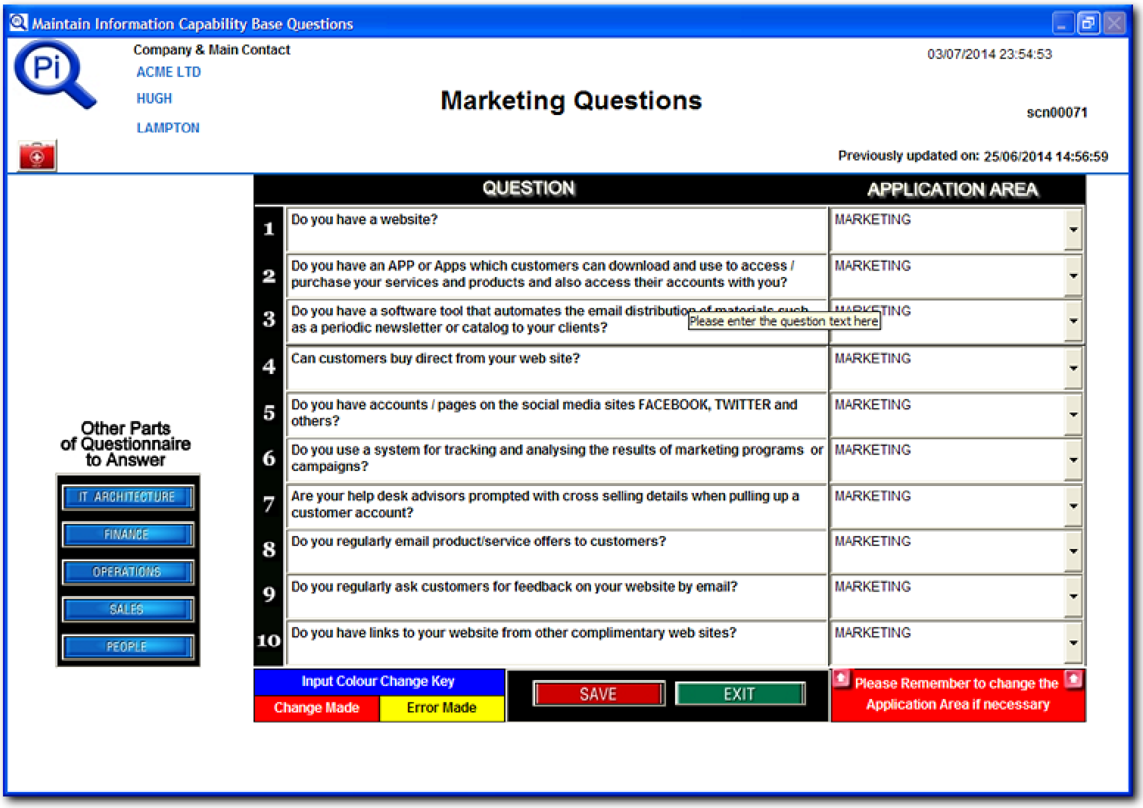
Here you may change the text of the ***Information Capability Questions*** relating to **Finance**. You may edit the text of an existing question or replace it with a completely new question. If necessary you should also change the application Area related to the question, using the drop-down selection list.

When the necessary input is complete you should either click the “**SAVE**” button or one of the Buttons listed under **“Other Parts of this Questionnaire**” to save the input. (You may jump around the questionnaire by use of the buttons located at the left hand side of the screen. IT Architecture   Marketing   Operations   Sales   People)

If a change is made to a question the background of the question will turn **RED** to indicate a change is being made. If an error is made in terms of an attempt being made to update with a “blank question” the background of the question will turn **YELLOW and** an error message will appear. An opportunity to reset the question back to its previous content is offered.

Clicking th **EXIT** button returns you to the File Maintenance Menu

2.64 New Marketing Questions



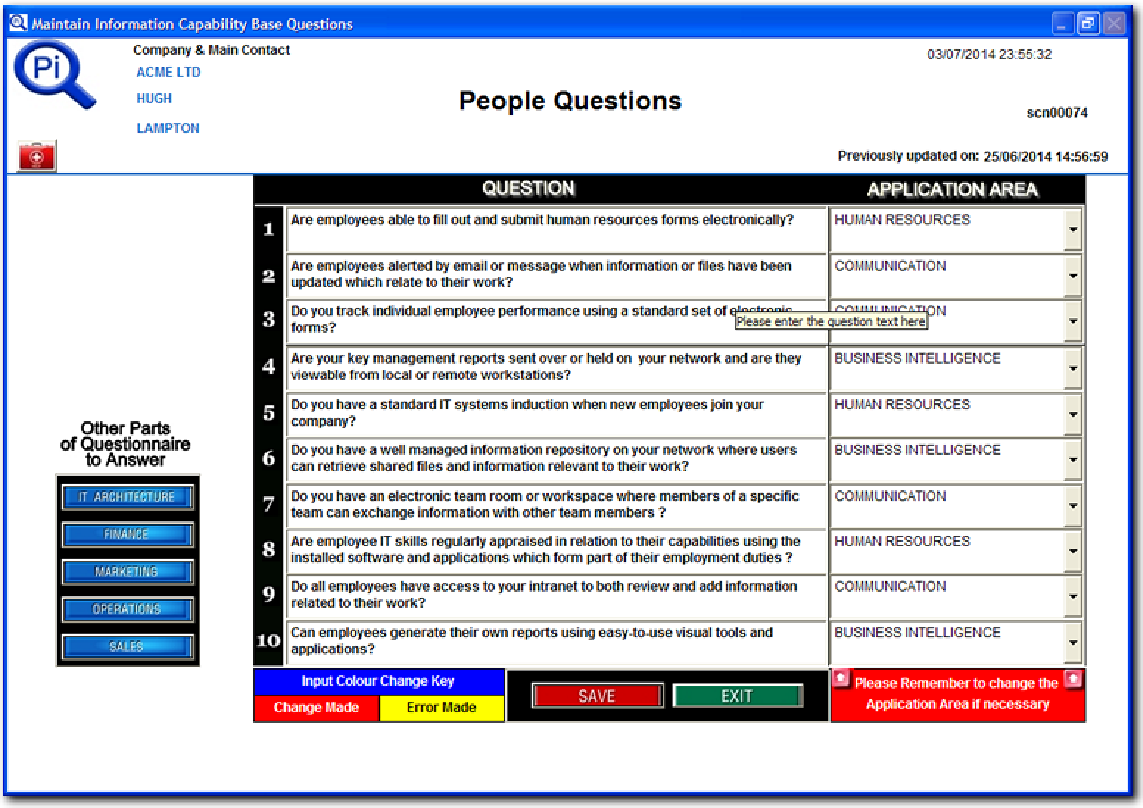
Here you may change the text of the ***Information Capability Questions*** relating to **Marketing**. You may edit the text of an existing question or replace it with a completely new question. If necessary you should also change the application Area related to the question, using the drop-down selection list.

When the necessary input is complete you should either click the “**SAVE**” button or one of the Buttons listed under **“Other Parts of this Questionnaire**” to save the input. (You may jump around the questionnaire by use of the buttons located at the left hand side of the screen. IT Architecture   Finance   Operations   Sales   People)

If a change is made to a question the background of the question will turn **RED** to indicate a change is being made. If an error is made in terms of an attempt being made to update with a “blank question” the background of the question will turn **YELLOW and** an error message will appear. An opportunity to reset the question back to its previous content is offered.

Clicking th **EXIT** button returns you to the File Maintenance Menu

2.65 New People Questions



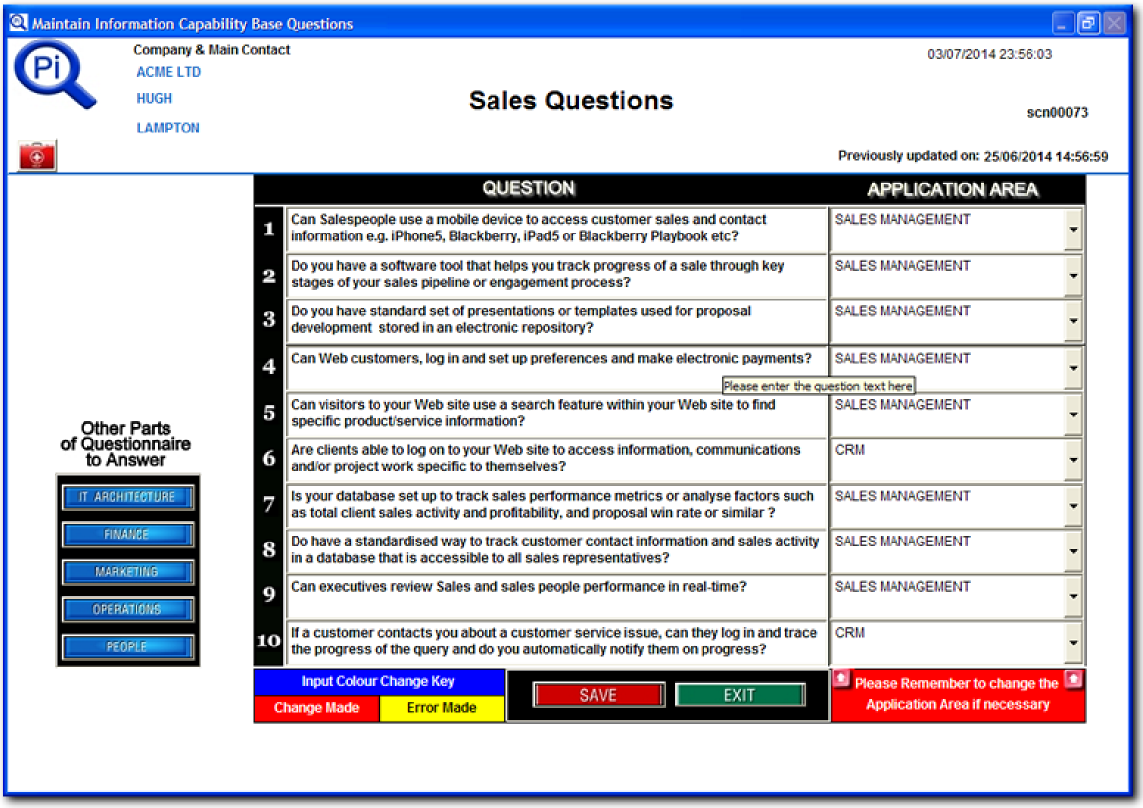
Here you may change the text of the ***Information Capability Questions*** relating to **Operations**. You may edit the text of an existing question or replace it with a completely new question. If necessary you should also change the application Area related to the question, using the drop-down selection list.

When the necessary input is complete you should either click the “**SAVE**” button or one of the Buttons listed under **“Other Parts of this Questionnaire**” to save the input. (You may jump around the questionnaire by use of the buttons located at the left hand side of the screen. IT Architecture Finance Marketing Operations Sales)

If a change is made to a question the background of the question will turn **RED** to indicate a change is being made. If an error is made in terms of an attempt being made to update with a “blank question” the background of the question will turn **YELLOW and** an error message will appear. An opportunity to reset the question back to its previous content is offered.

Clicking th **EXIT** button returns you to the File Maintenance Menu

2.66 New Sales Questions



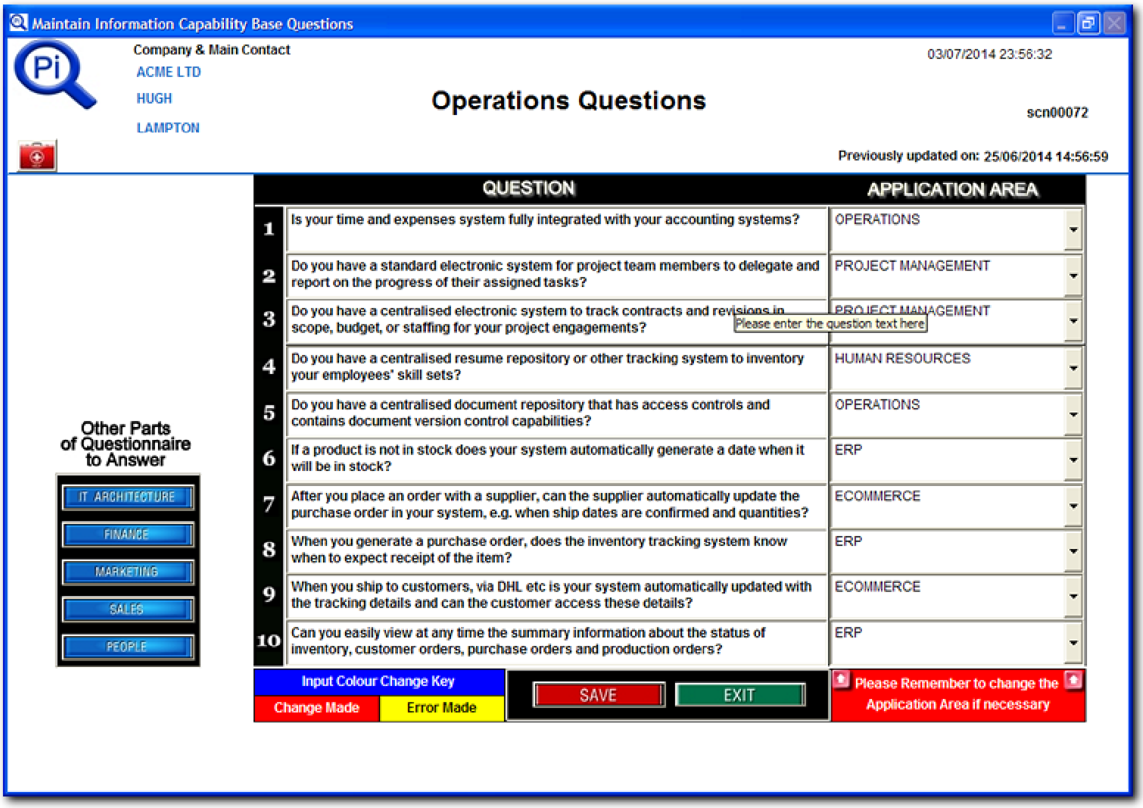
Here you may change the text of the ***Information Capability Questions*** relating to **Operations**. You may edit the text of an existing question or replace it with a completely new question. If necessary you should also change the application Area related to the question, using the drop-down selection list.

When the necessary input is complete you should either click the “**SAVE**” button or one of the Buttons listed under **“Other Parts of this Questionnaire**” to save the input. (You may jump around the questionnaire by use of the buttons located at the left hand side of the screen. IT Architecture Finance Marketing Operations People)

If a change is made to a question the background of the question will turn **RED** to indicate a change is being made. If an error is made in terms of an attempt being made to update with a “blank question” the background of the question will turn **YELLOW and** an error message will appear. An opportunity to reset the question back to its previous content is offered.

Clicking th **EXIT** button returns you to the File Maintenance Menu

2.67 New Operations Questions



Here you may change the text of the ***Information Capability Questions*** relating to **Operations**. You may edit the text of an existing question or replace it with a completely new question. If necessary you should also change the application Area related to the question, using the drop-down selection list.

When the necessary input is complete you should either click the “**SAVE**” button or one of the Buttons listed under “**Other Parts of this Questionnaire**” to save the input. (You may jump around the questionnaire by use of the buttons located at the left hand side of the screen. IT Architecture Finance Marketing Sales People)

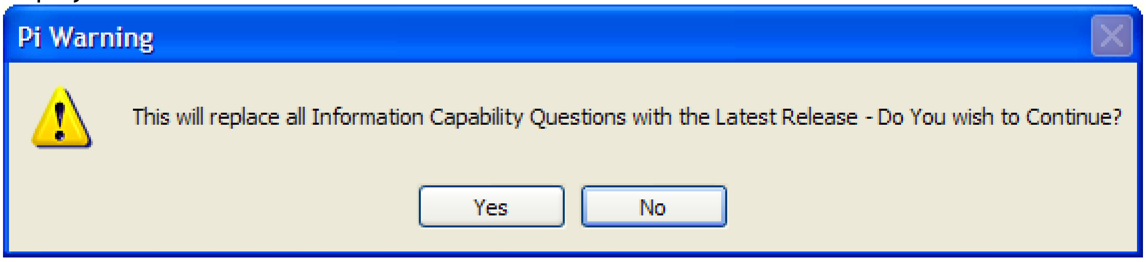
If a change is made to a question the background of the question will turn **RED** to indicate a change is being made. If an error is made in terms of an attempt being made to update with a “blank question” the background of the question will turn **YELLOW and** an error message will appear. An opportunity to reset the question back to its previous content is offered.

Clicking th **EXIT** button returns you to the File Maintenance Menu

2.68 Replace Information Capability Questions

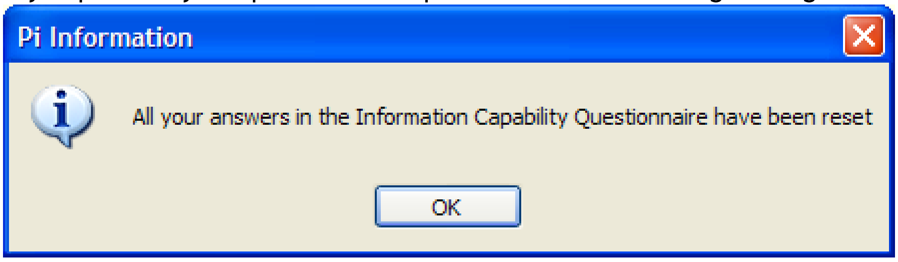
This option allows you to change your Information Capability questions to the latest version of these questions for the **currently selected company.**

On selection of this option from the File Maintenance Sub Menu the following message is displayed:

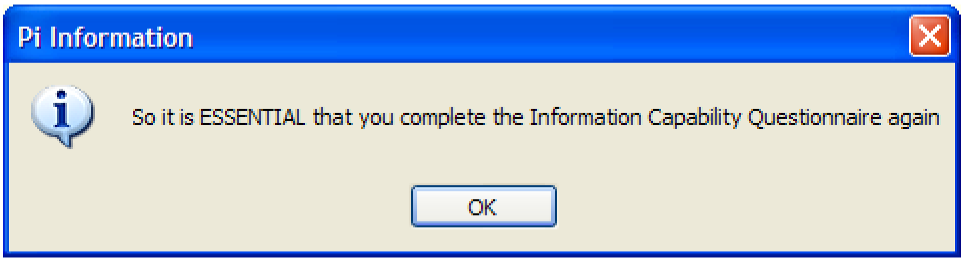


This alerts you that if you proceed your Information Capability Questions will be updated to the latest version.

If you proceed your questions are updated and the following message is displayed:



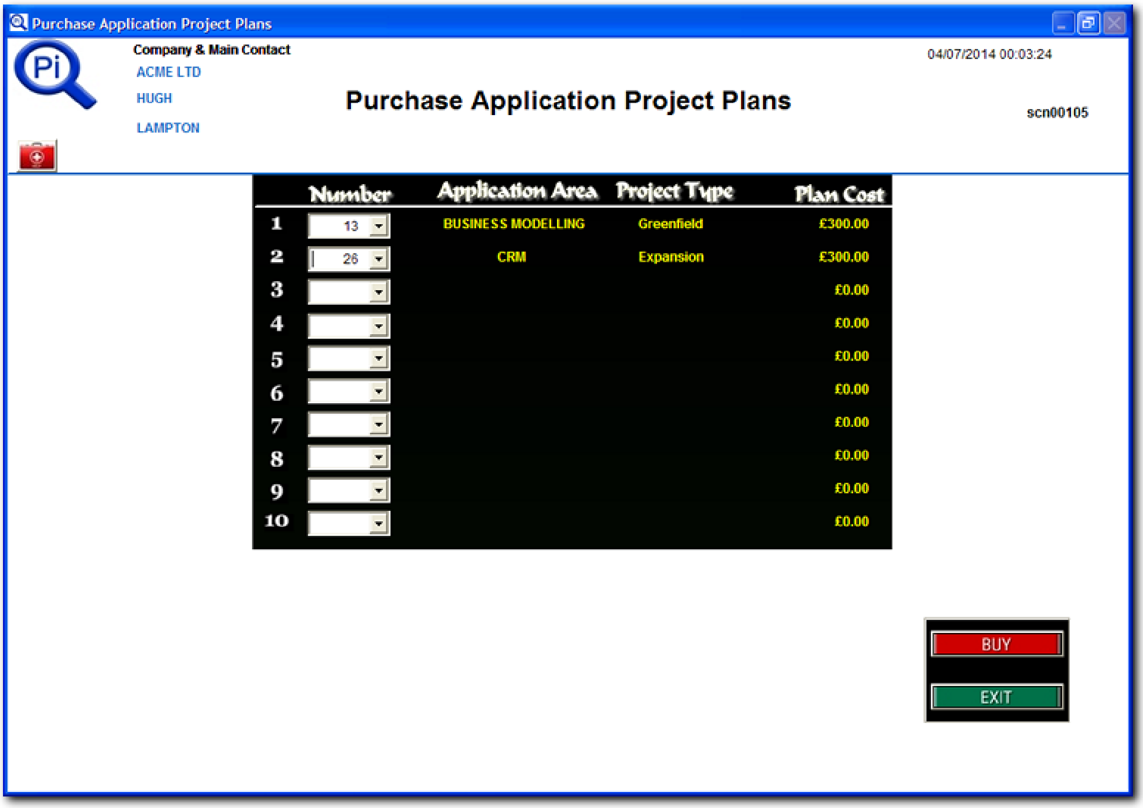
This message informs you that the update is complete and is followed by a further message:



This informs you that you must now complete the Information Capability questionnaire again for the **currently selected company**. This is essential as the questionnaire answers have all been reset due to the questions now being different to the original, so you must complete the questionnaire again.

You are then returned to the File Maintenance Menu

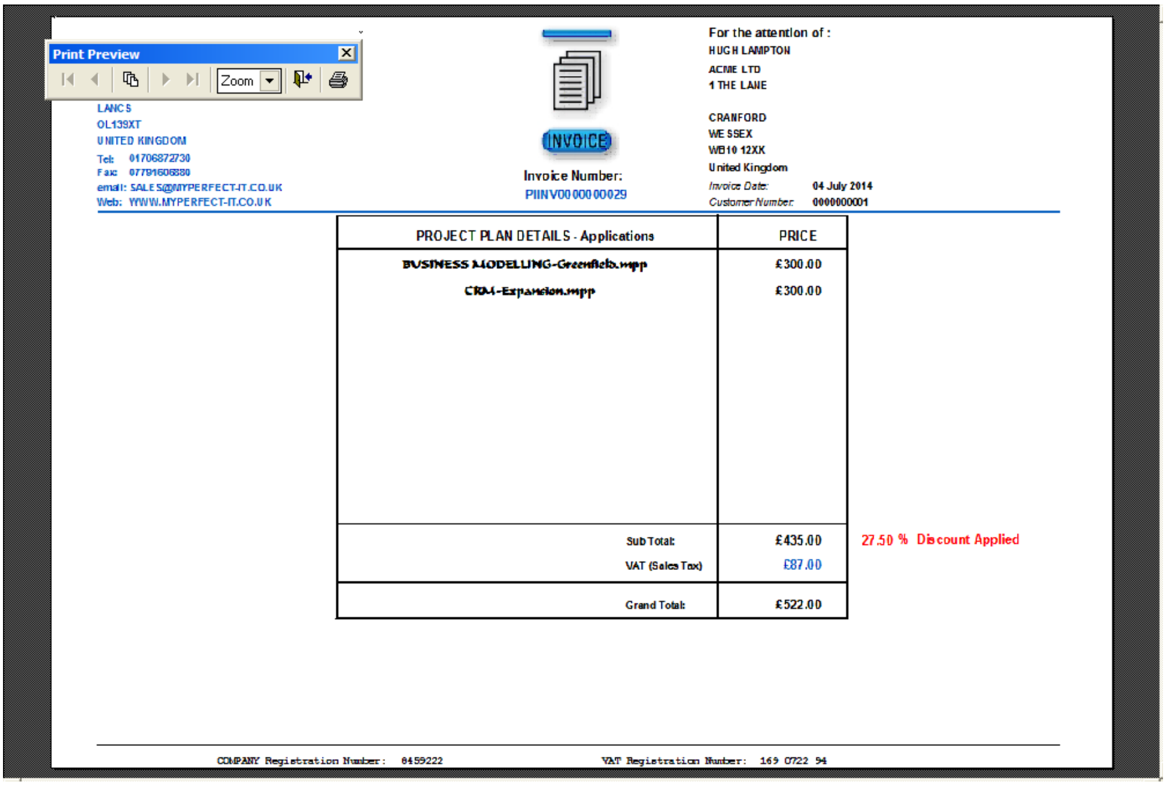
2.69 Purchase Application Project Plans



Here you can purchase the Application Project Plans that Pi has **recommended** need to be actioned. The Projects can be selected by use of a drop down selection list. When Selected the Application Area, Project Type and Cost for buying the Plan are displayed. When selection is complete you should click the **BUY** button. An invoice is displayed and saved to disk for the selected project plans and summary financial details are passed to the Account Options Menu file. To return to the Project Plans Menu without purchasing you should click the **EXIT** button.

In the Standalone PC Single Company Version the Invoice is replaced by a Purchase Order

INVOICE Version


Print Preview

Zoom

LANCS
OL139XT
UNITED KINGDOM
Tel: 01706872730
Fax: 07791606880
email: SALES@MYPERFECT-IT.CO.UK
Web: WWW.MYPERFECT-IT.CO.UK

INVOICE

Invoice Number:
PIINV0000000029

For the attention of :
HUGH LAMPTON
ACME LTD
1 THE LANE
CRANFORD
WESSEX
WB10 12XX
United Kingdom
Invoice Date: 04 July 2014
Customer Number: 0000000001

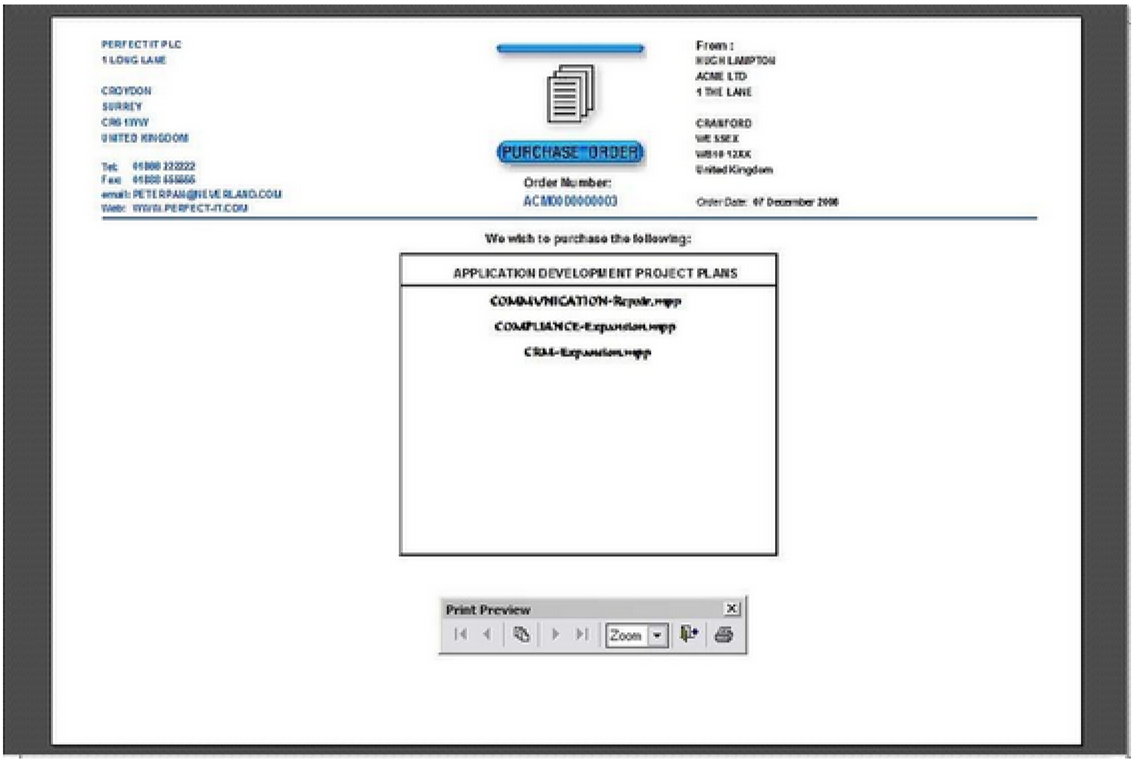
PROJECT PLAN DETAILS - Applications	PRICE
BUSINESS MODELLING-Greenfields.mpp	£300.00
CRM-Expansion.mpp	£300.00
Sub Total:	£435.00
VAT (Sales Tax)	£87.00
Grand Total:	£522.00

27.50 % Discount Applied

COMPANY Registration Number: 0459222 VAT Registration Number: 169 0722 94

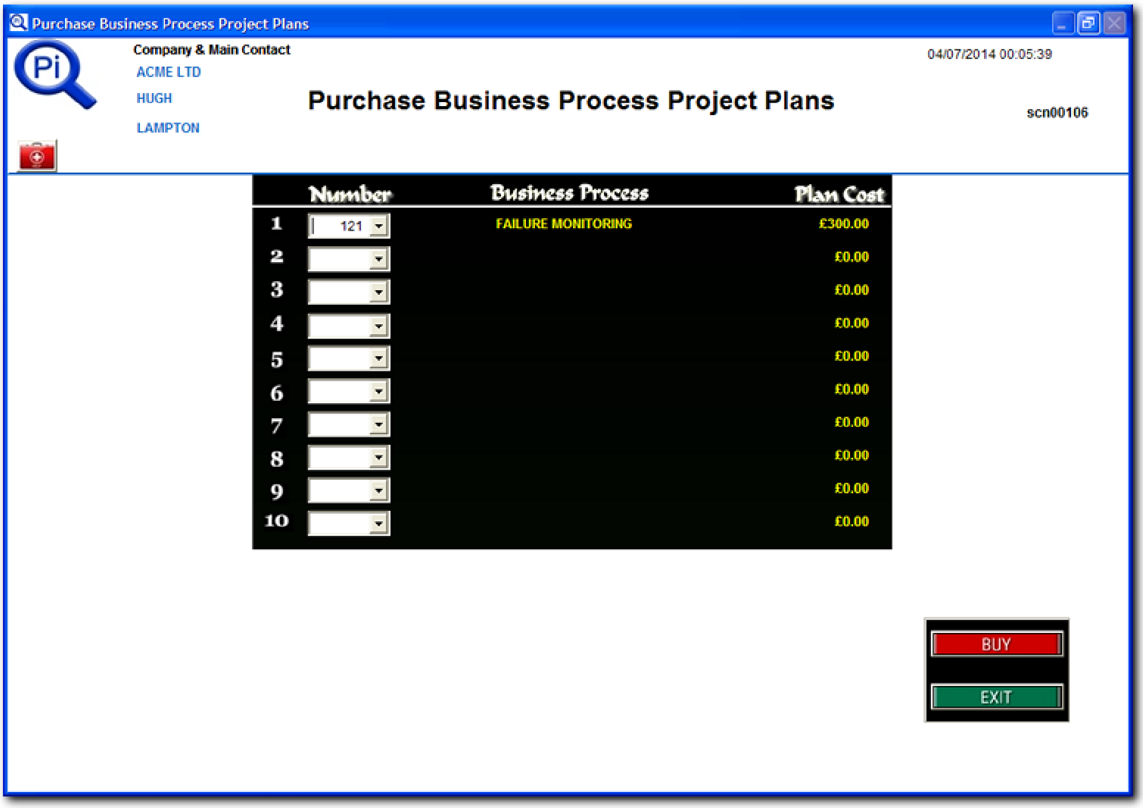
You are then returned to the Project Plans Menu

PURCHASE ORDER Version



You are then returned to the Project Plans Menu

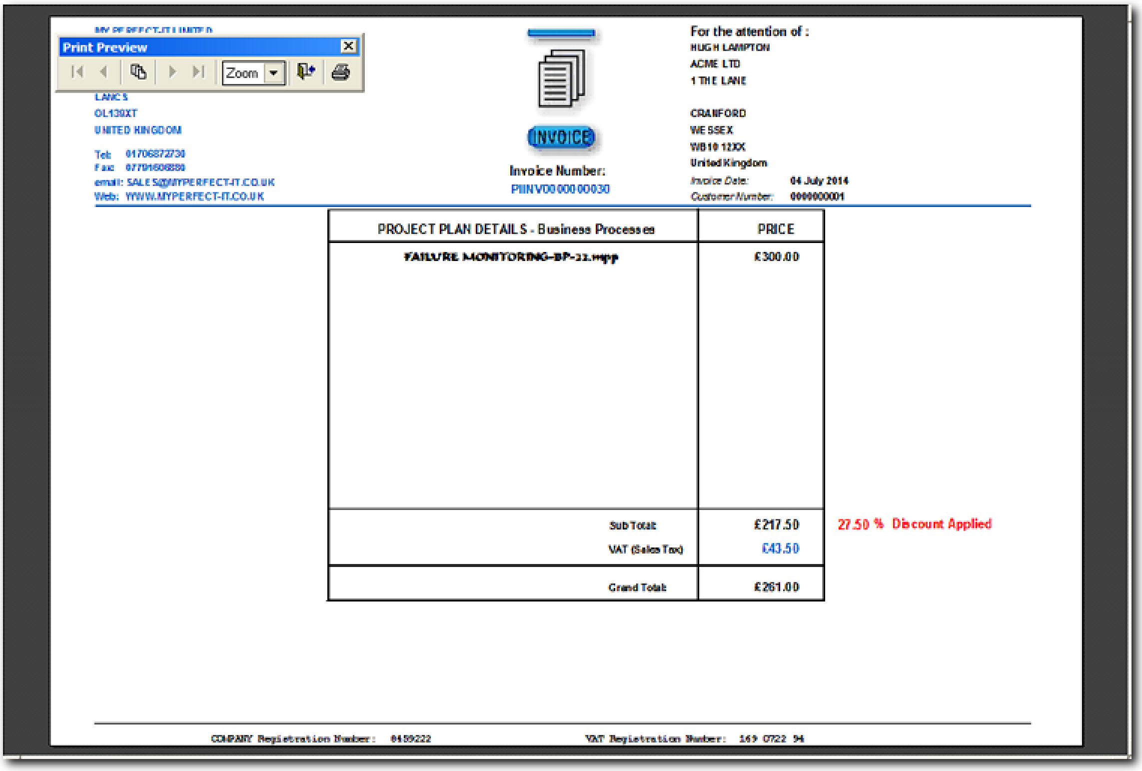
2.70 Purchase Business Process Project Plans



Here you can purchase the Business Process Project Plans that Pi has recommended need to be actioned. The Projects can be selected by use of a drop down selection list. When Selected the Business Process and Cost for buying the Plan are displayed. When selection is complete you should click the **BUY** button. An invoice is displayed and saved to disk for the selected project plans and summary financial details are passed to the Account Options Menu file. To return to the Project Plans Menu without purchasing you should click the **EXIT** button.

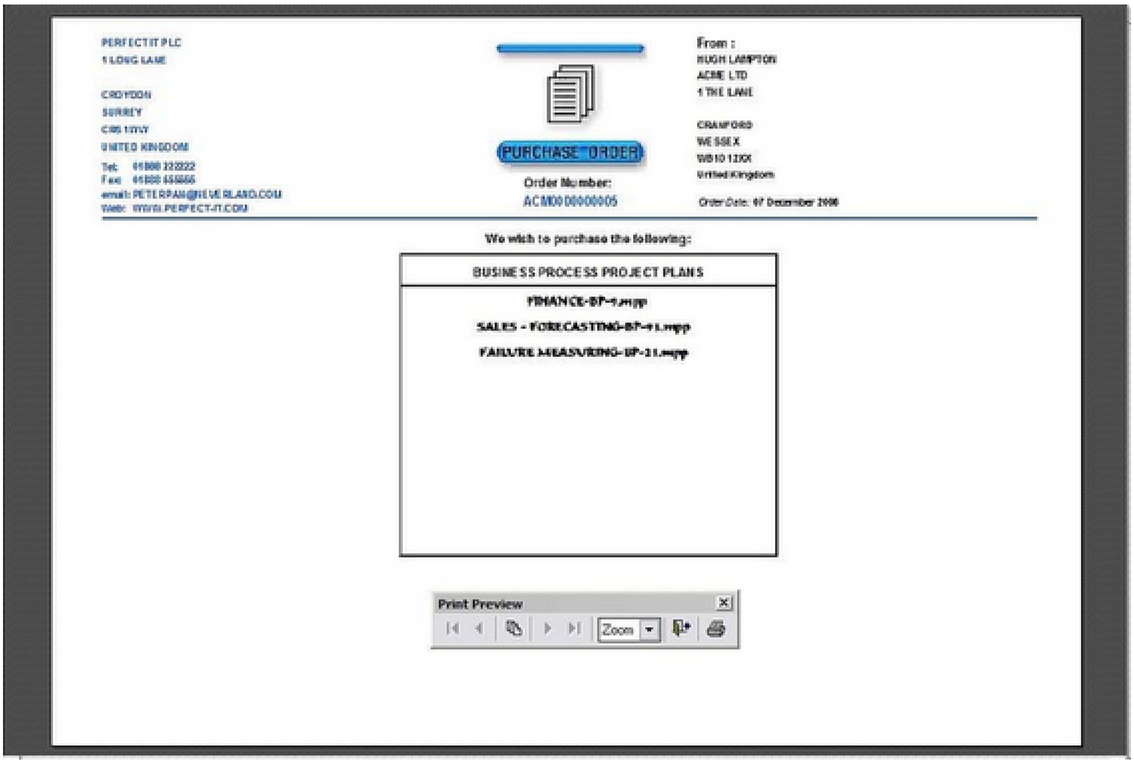
In the Standalone PC Single Company Version the Invoice is replaced by a Purchase Order

INVOICE Version



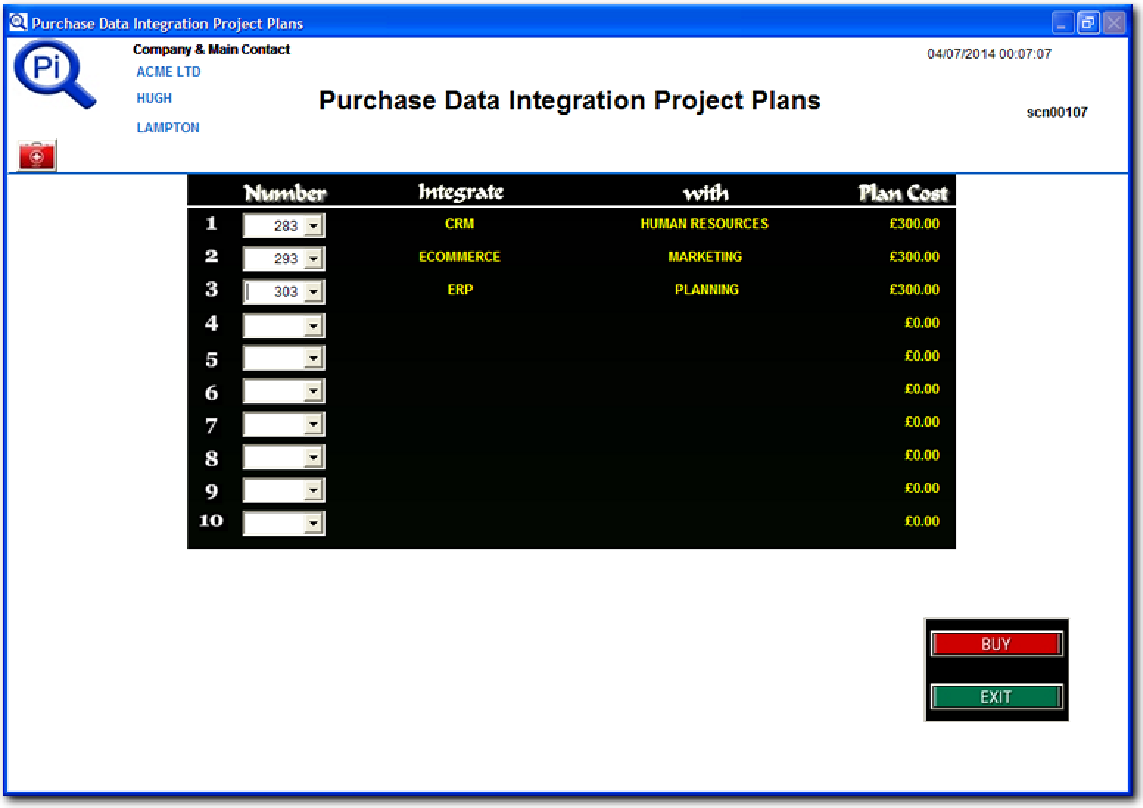
You are then returned to the Project Plans Menu

PURCHASE ORDER Version



You are then returned to the Project Plans Menu

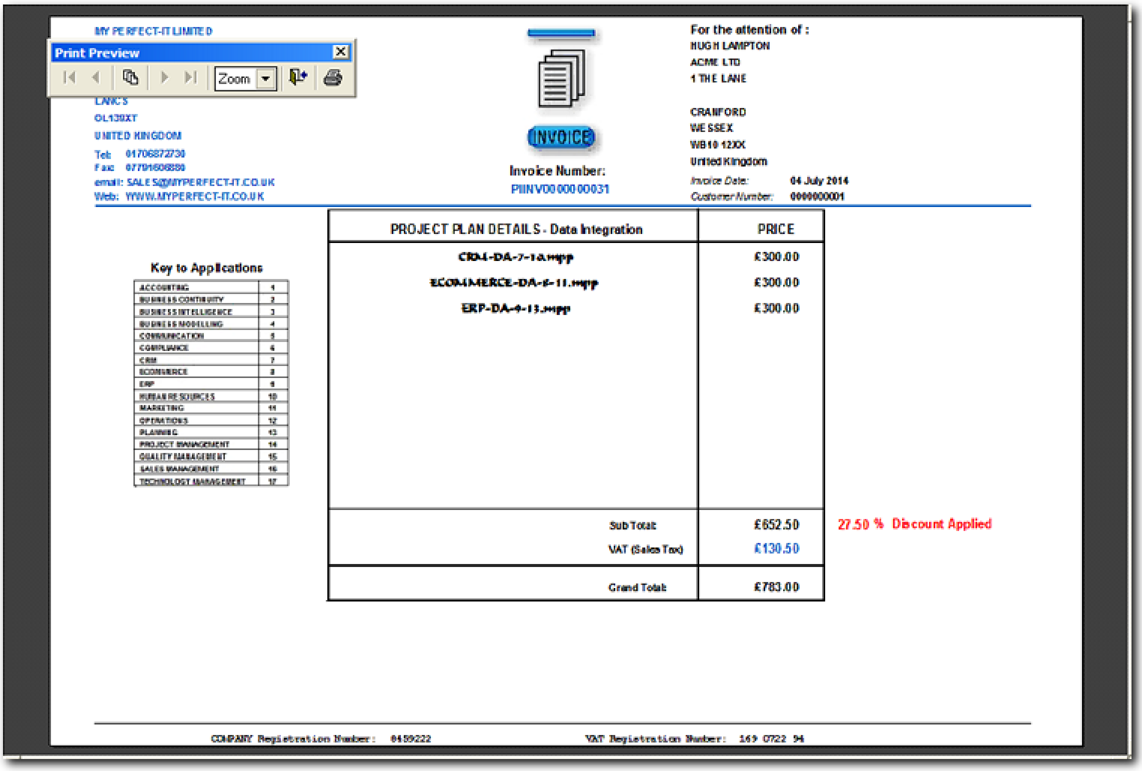
2.71 Purchase Data Integration Project Plans



Here you can purchase the Data Integration Project Plans that Pi has recommended need to be actioned. The Projects can be selected by use of a drop down selection list. When Selected the Applications to be Integrated and Cost for buying the Plan are displayed. When selection is complete you should click the **BUY** button. An invoice is displayed and saved to disk for the selected project plans and summary financial details are passed to Account Options Menu file. To return to the Project Plans Menu without purchasing you should click the **EXIT** button.

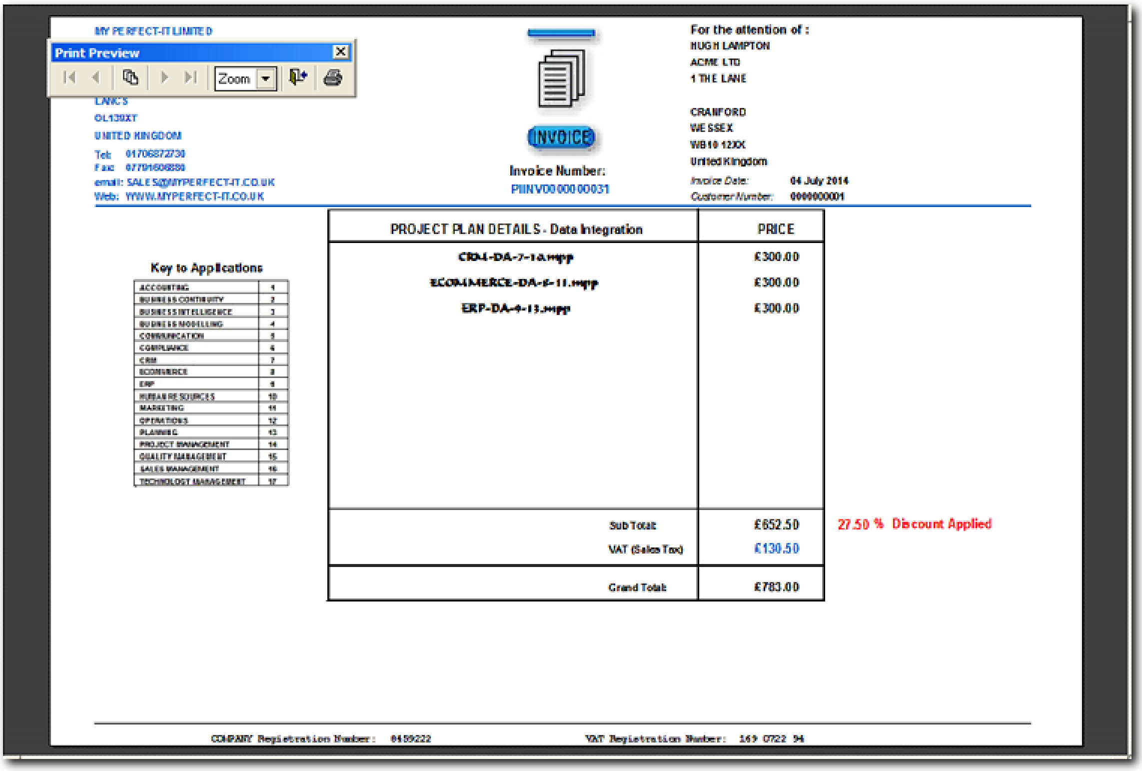
In the Standalone PC Single Company Version the Invoice is replaced by a Purchase Order

INVOICE Version



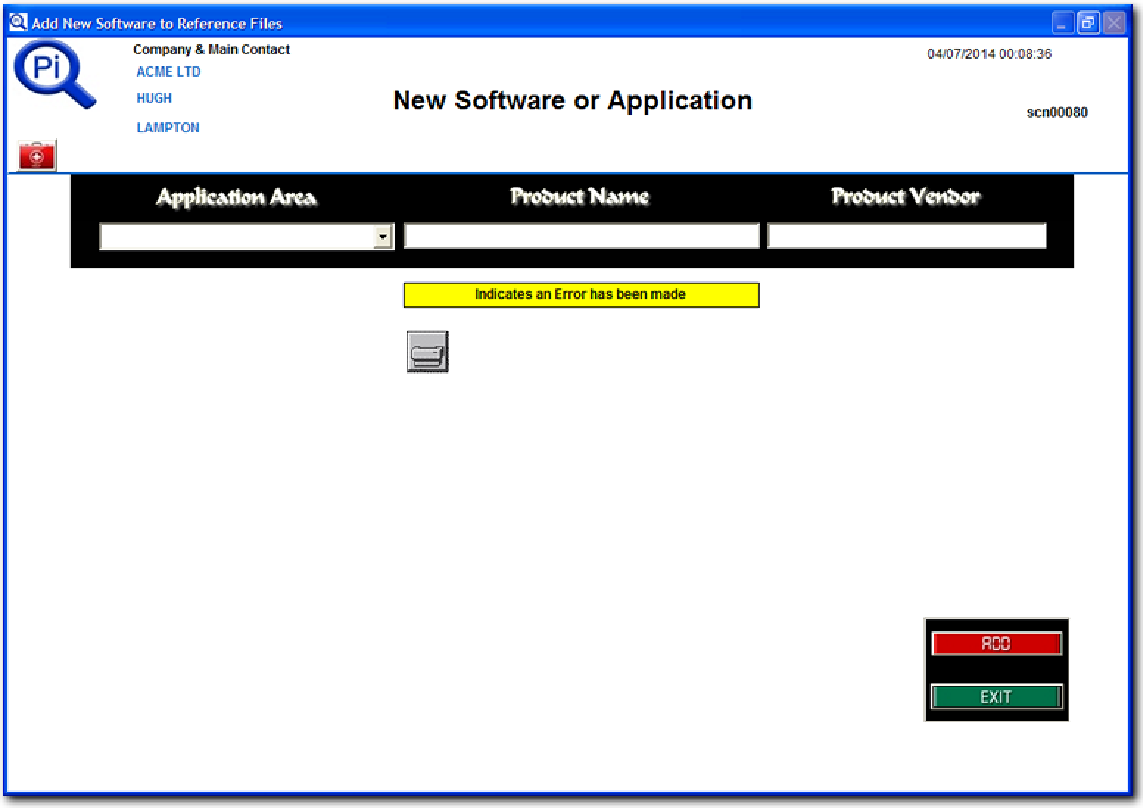
You are then returned to the Project Plans Menu

PURCHASE ORDER Version



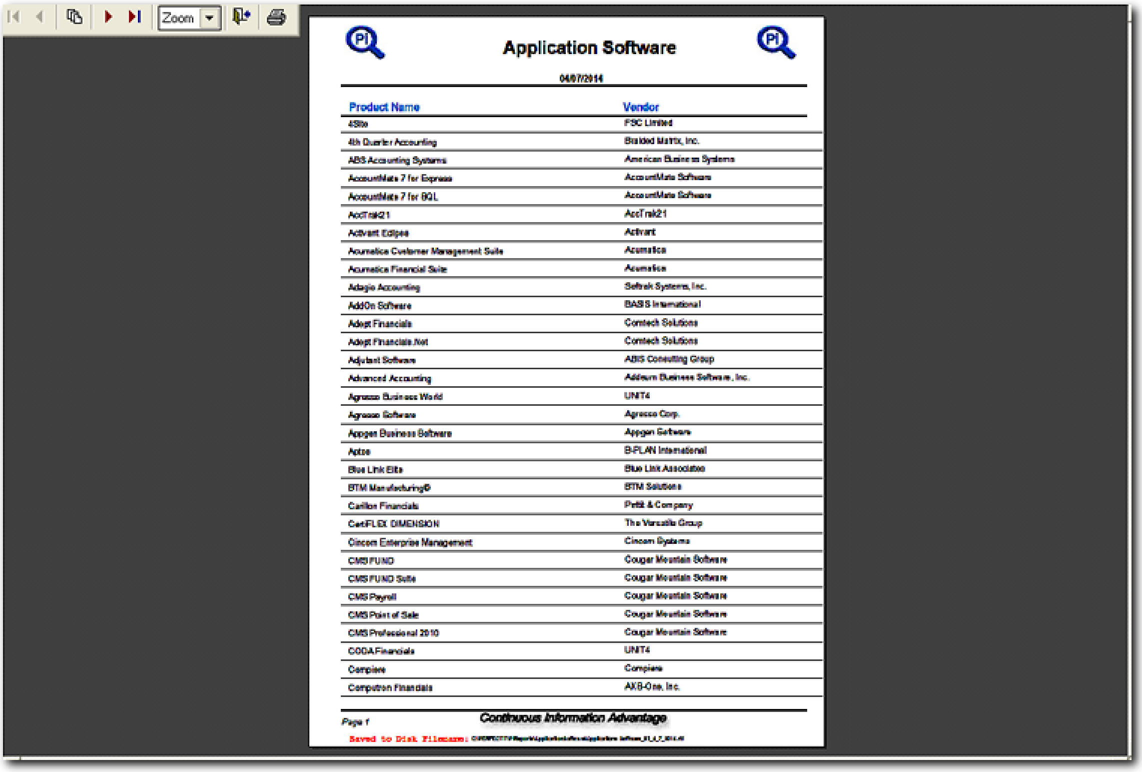
You are then returned to the Project Plans Menu

2.72 Add New Software



Here you may enter details of new software and/or Applications. You should first select the Application Area related to the new software by use of a drop down selection list. You should then enter the Product Name and Product Vendor. If errors are made, the background of the offending input(s) will turn Yellow to indicate an error. If duplicate product entry is attempted an error message will appear indicating this error. Clicking **EXIT** will return you to the Technology Menu.

Below the questions is a Print Button which allows you to print a list of all the Application software available. Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk



Application Software

04/07/2014

Product Name	Vendor
4Site	FSC Limited
4th Quarter Accounting	Braided Matrix, Inc.
ABS Accounting Systems	American Business Systems
AccountMate 7 for Express	AccountMate Software
AccountMate 7 for SQL	AccountMate Software
AccTrak21	AccTrak21
Activant Eclipse	Activant
Acumatica Customer Management Suite	Acumatica
Acumatica Financial Suite	Acumatica
Adagio Accounting	Softrak Systems, Inc.
AddOn Software	BASIS International
Adept Financials	Comtech Solutions
Adept Financials.Net	Comtech Solutions
Adjutant Software	ABS Consulting Group
Advanced Accounting	Addsum Business Software, Inc.
Agresso Business World	UNIT4
Agresso Software	Agresso Corp.
Appgen Business Software	Appgen Software
Aptos	B-PLAN International
Blue Link Elite	Blue Link Associates
BTM Manufacturing®	BTM Solutions
Carillon Financials	Pettit & Company
CertFLEX DIMENSION	The Versatile Group
Cincom Enterprise Management	Cincom Systems
CMS FUND	Cougar Mountain Software
CMS FUND Suite	Cougar Mountain Software
CMS Payroll	Cougar Mountain Software
CMS Point of Sale	Cougar Mountain Software
CMS Professional 2010	Cougar Mountain Software
CODA Financials	UNIT4
Compiere	Compiere
Computron Financials	AXS-One, Inc.

Page 1 Continuous Information Advantage

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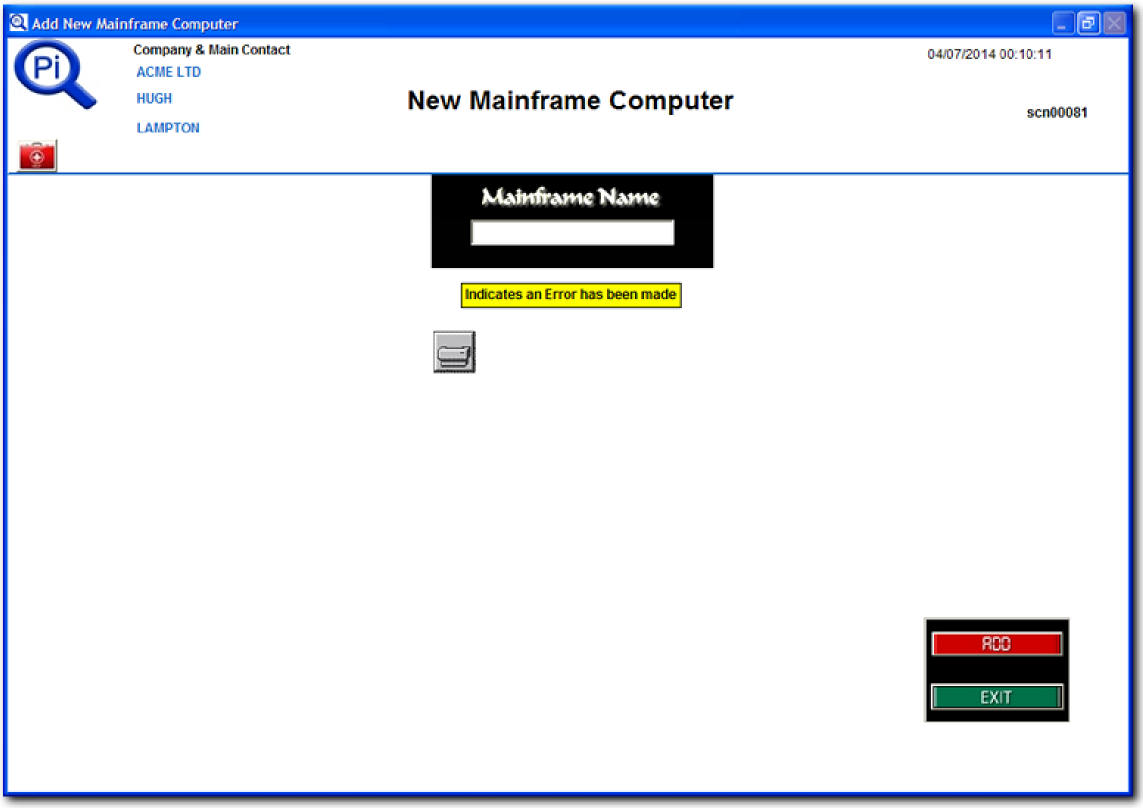
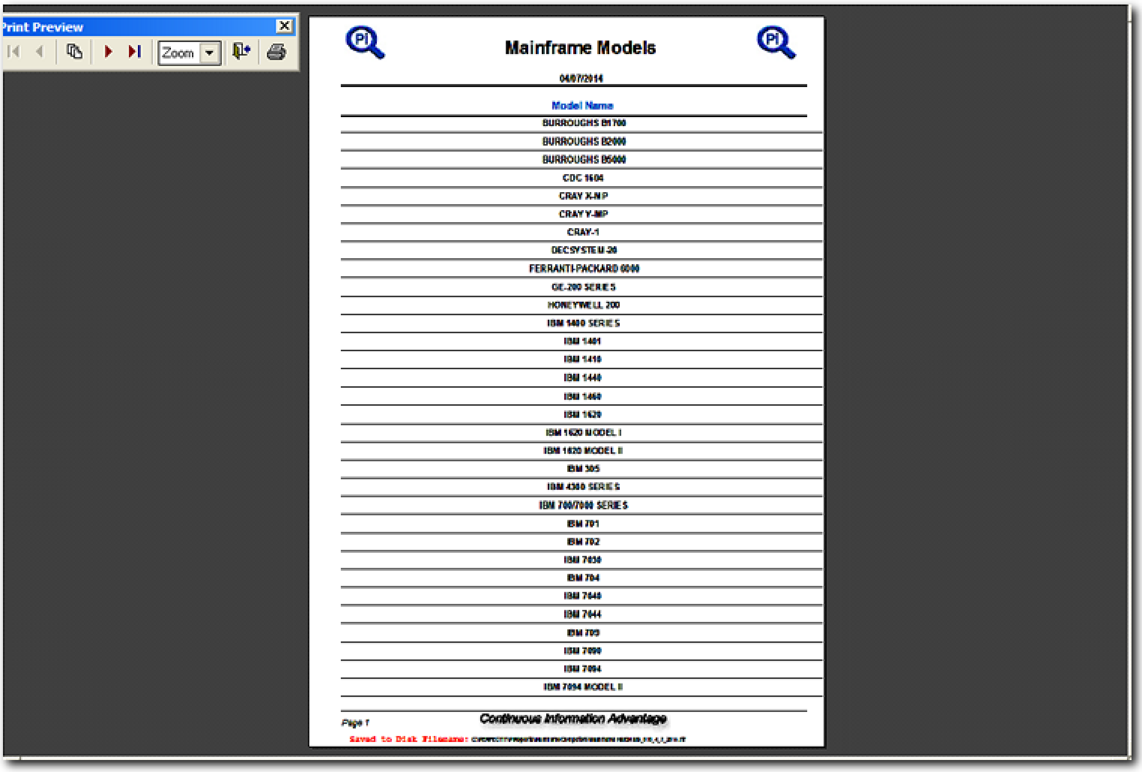
2.73 Add New Mainframe

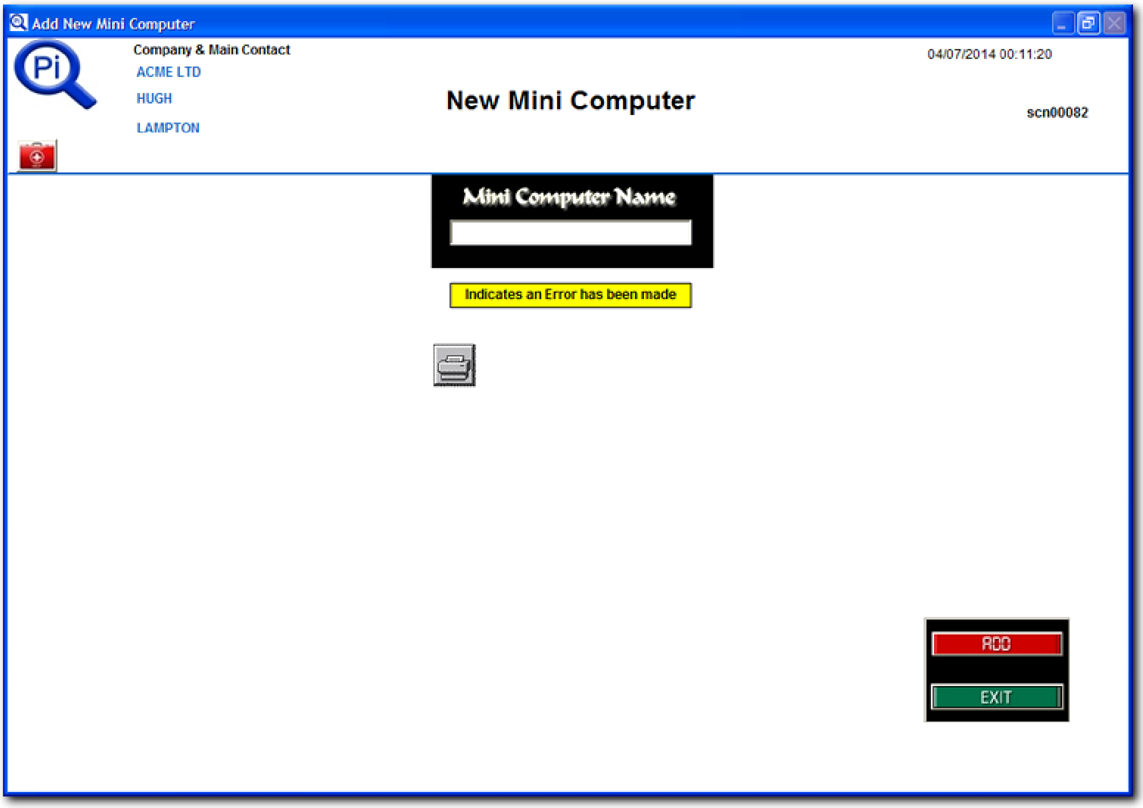


Here you may enter details of new Mainframe hardware. You should enter the name of the Mainframe hardware. If errors are made, the background of the input will turn Yellow to indicate an error. If a duplicate (existing) Mainframe Name entry is attempted an error message will appear indicating this error. Clicking **EXIT** will return you to the Technology Menu.

Below the questions is a Print Button which allows you to print a list of all the models available. Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk

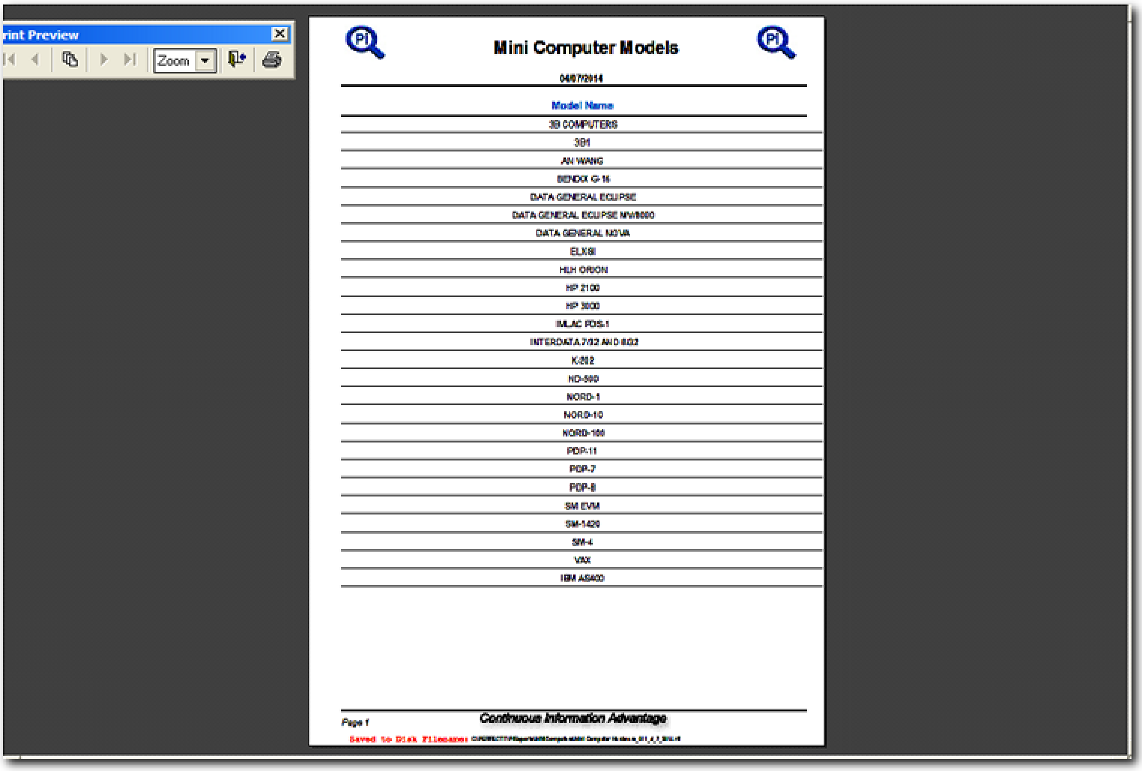


2.74 Add New Mini Computer

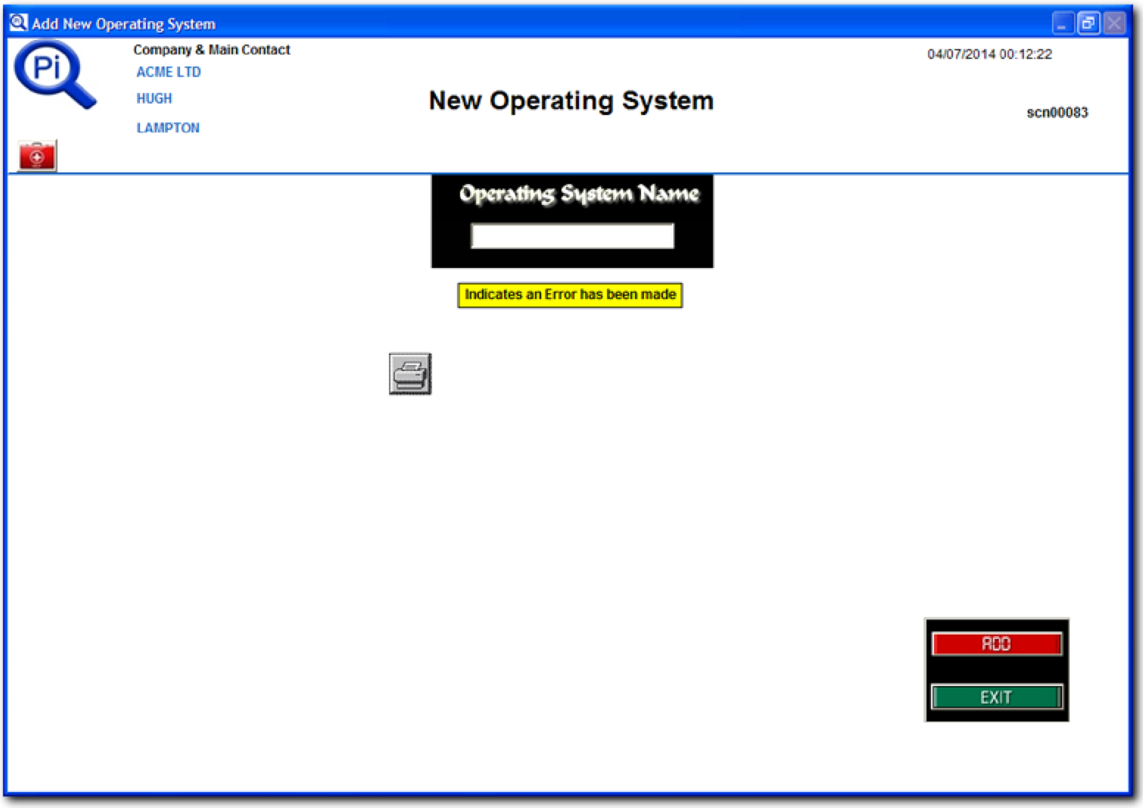


Here you may enter details of new Mini computer hardware. You should enter the name of the Mini Computer. If errors are made, the background of the input will turn Yellow to indicate an error. If a duplicate (existing) Mini Computer Name entry is attempted an error message will appear indicating this error. Clicking **EXIT** will return you to the Technology Menu.

Below the questions is a Print Button which allows you to print a list of all the models available. Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk

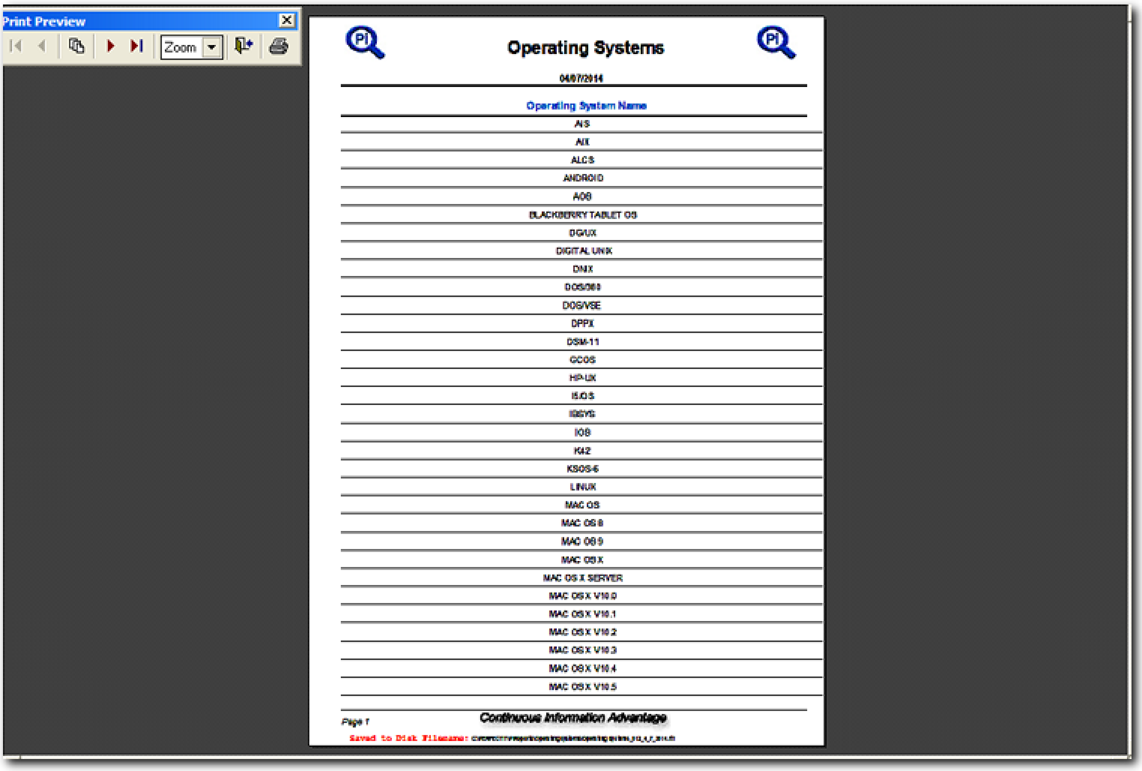


2.75 Add New Operating System

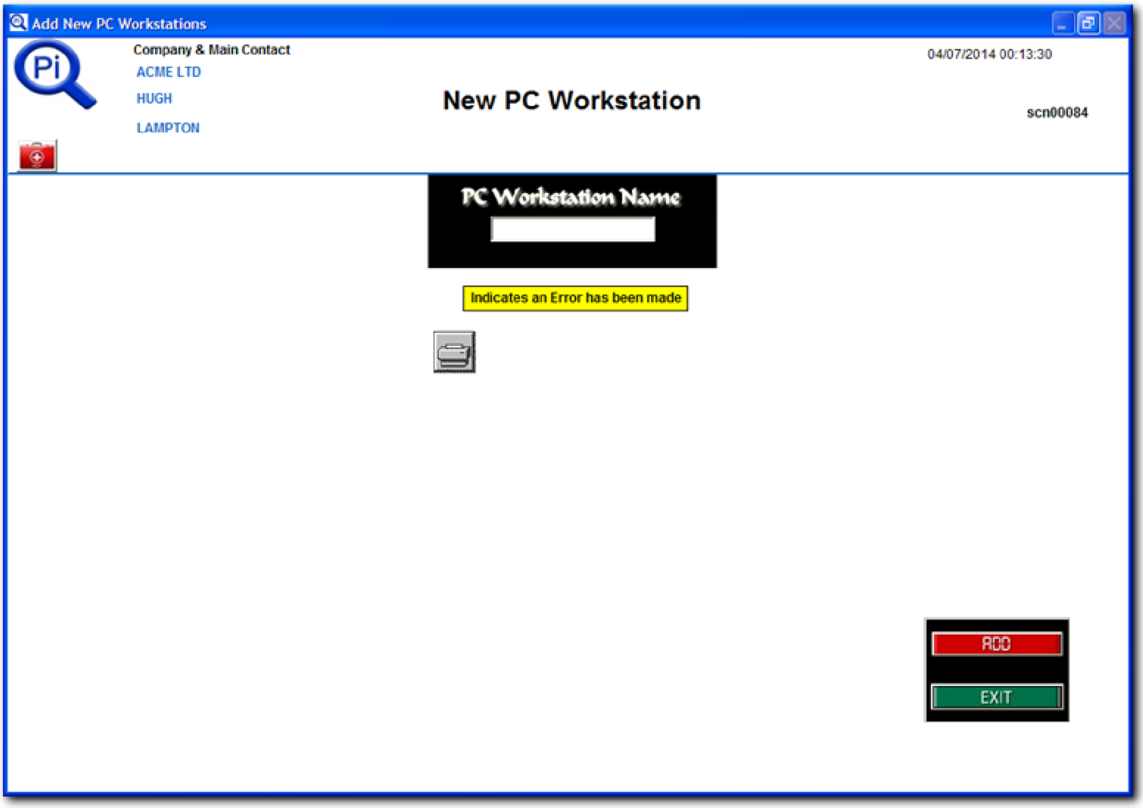


Here you may enter details of new Operating Systems. You should enter the name of the Operating System. If errors are made, the background of the input will turn Yellow to indicate an error. If a duplicate (existing) Operating System Name entry is attempted an error message will appear indicating this error. Clicking **EXIT** will return you to the Technology Menu.

Below the questions is a Print Button which allows you to print a list of all the Operating Systems available. Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk

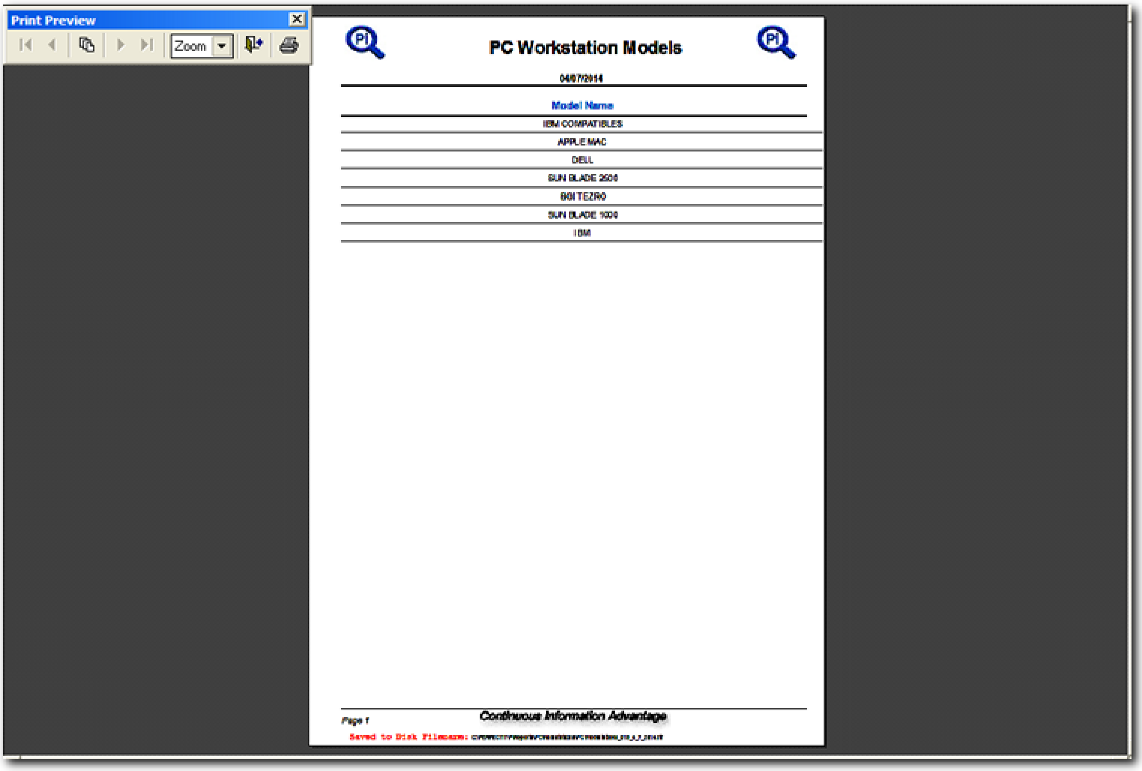


2.76 Add New PC Workstations

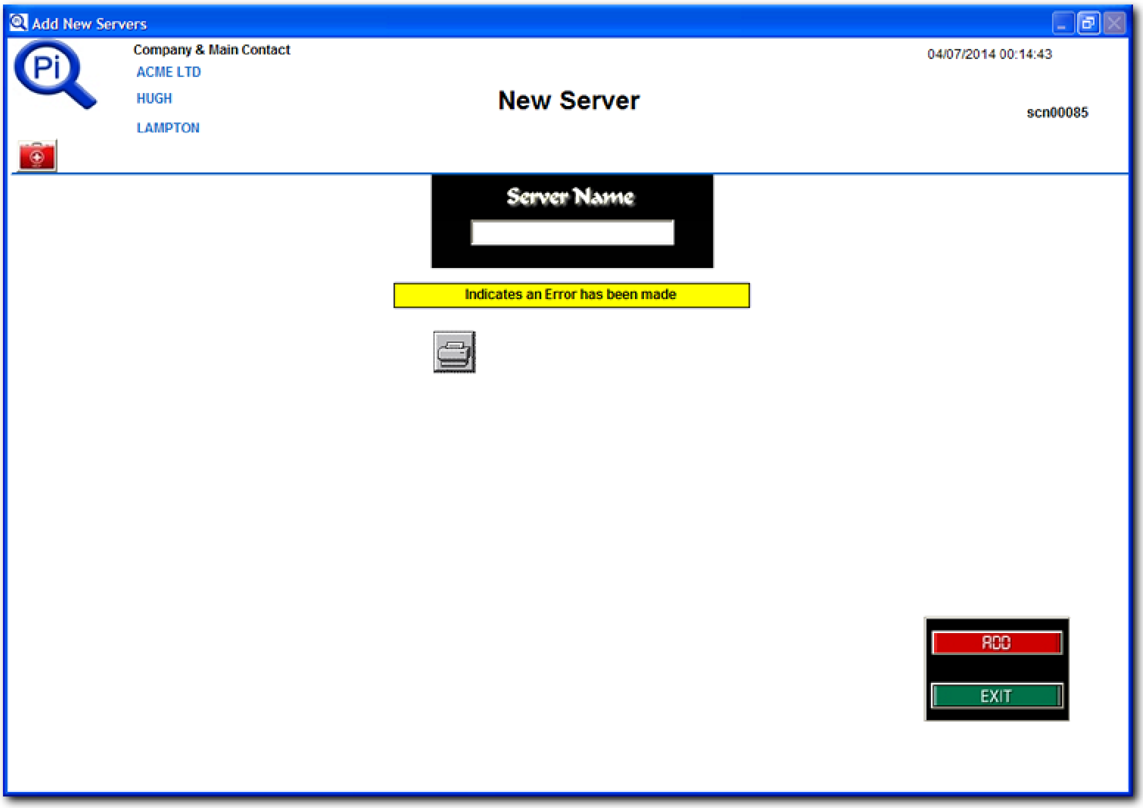


Here you may enter details of new PC Workstations. You should enter the name of the PC Workstation. If errors are made, the background of the input will turn Yellow to indicate an error. If a duplicate (existing) PC Workstation Name entry is attempted an error message will appear indicating this error. Clicking **EXIT** will return you to the Technology Menu.

Below the questions is a Print Button which allows you to print a list of all the models available. Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk

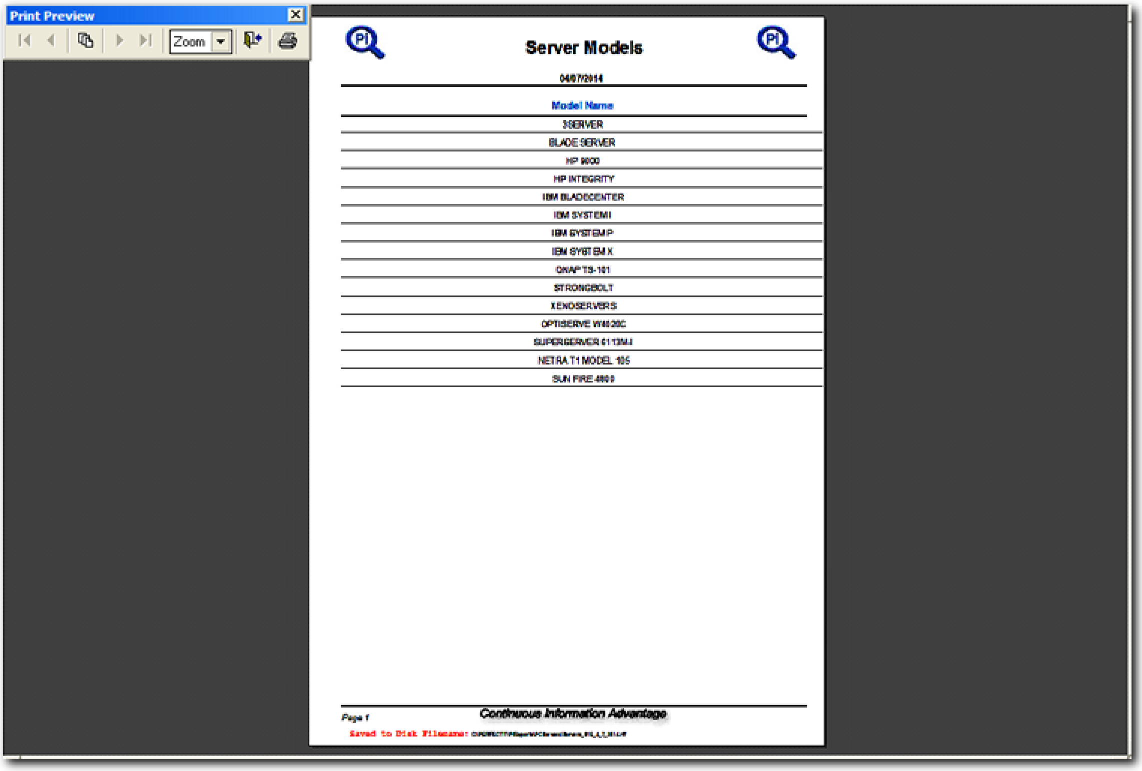


2.77 Add New Server

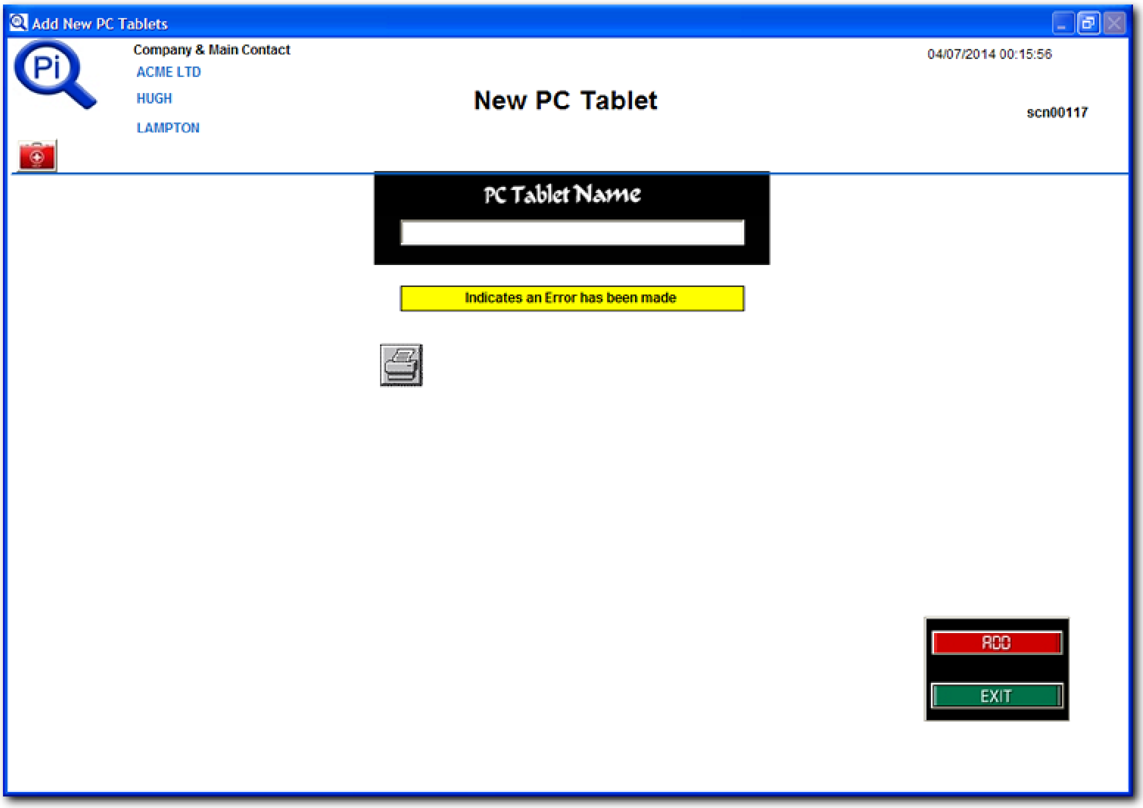


Here you may enter details of new Server hardware. You should enter the name of the Server Hardware. If errors are made, the background of the input will turn Yellow to indicate an error. If a duplicate (existing) Server Name entry is attempted an error message will appear indicating this error. Clicking **EXIT** will return you to the Technology Menu.

Below the questions is a Print Button which allows you to print a list of all the models available. Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk

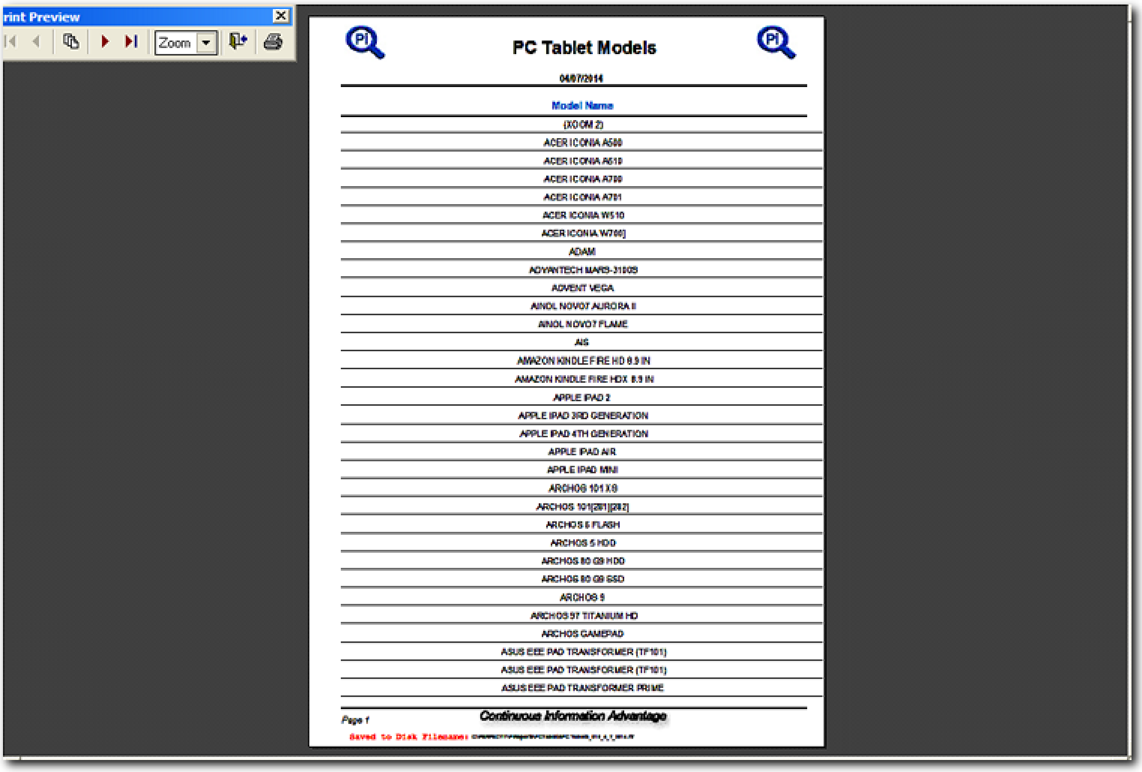


2.78 Add New PC Tablet

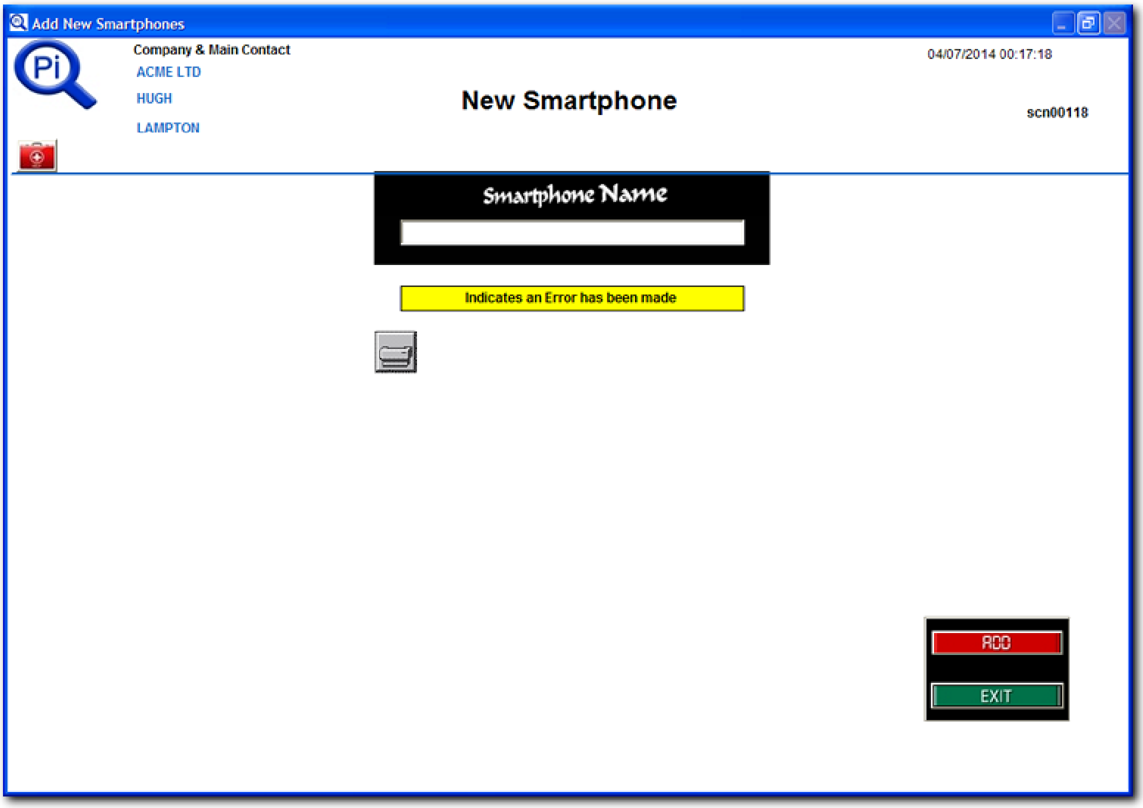


Here you may enter details of new PC Tablet models. You should enter the name of the PC Tablet Model. If errors are made, the background of the input will turn Yellow to indicate an error. If a duplicate (existing) PC Tablet model Name entry is attempted an error message will appear indicating this error. Clicking **EXIT** will return you to the Technology Menu.

Below the questions is a Print Button which allows you to print a list of all the models available. Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk

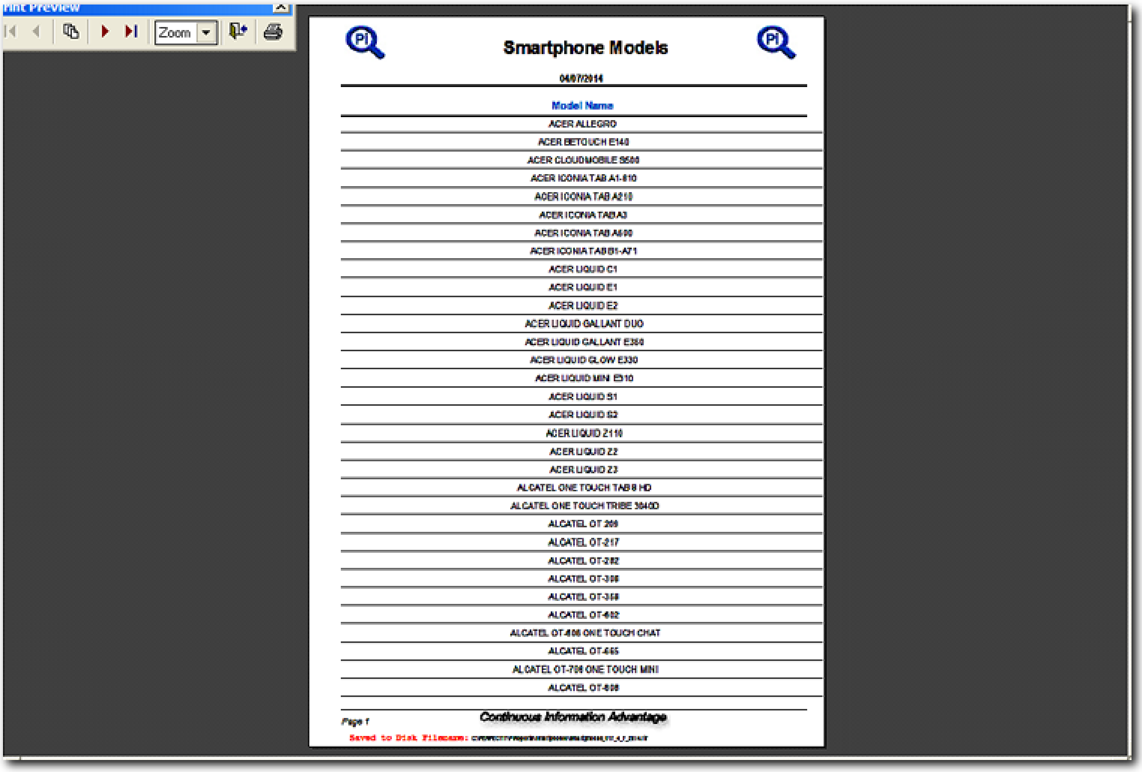

rint Preview
Zoom
PC Tablet Models
04/07/2014
Model Name
(XOOM 2)
ACER ICONIA A500
ACER ICONIA A510
ACER ICONIA A700
ACER ICONIA A701
ACER ICONIA W510
ACER ICONIA W700]
ADAM
ADVANTECH MARS-3100S
ADVENT VEGA
AINOL NOVO7 AURORA II
AINOL NOVO7 FLAME
AIS
AMAZON KINDLE FIRE HD 8.9 IN
AMAZON KINDLE FIRE HDX 8.9 IN
APPLE IPAD 2
APPLE IPAD 3RD GENERATION
APPLE IPAD 4TH GENERATION
APPLE IPAD AIR
APPLE IPAD MINI
ARCHOS 101 XS
ARCHOS 101[281][282]
ARCHOS 5 FLASH
ARCHOS 5 HDD
ARCHOS 80 G9 HDD
ARCHOS 80 G9 SSD
ARCHOS 9
ARCHOS 97 TITANIUM HD
ARCHOS GAMEPAD
ASUS EEE PAD TRANSFORMER (TF101)
ASUS EEE PAD TRANSFORMER (TF101)
ASUS EEE PAD TRANSFORMER PRIME
Page 1
Continuous Information Advantage
Saved to Disk Filename:

2.79 Add New Smartphone

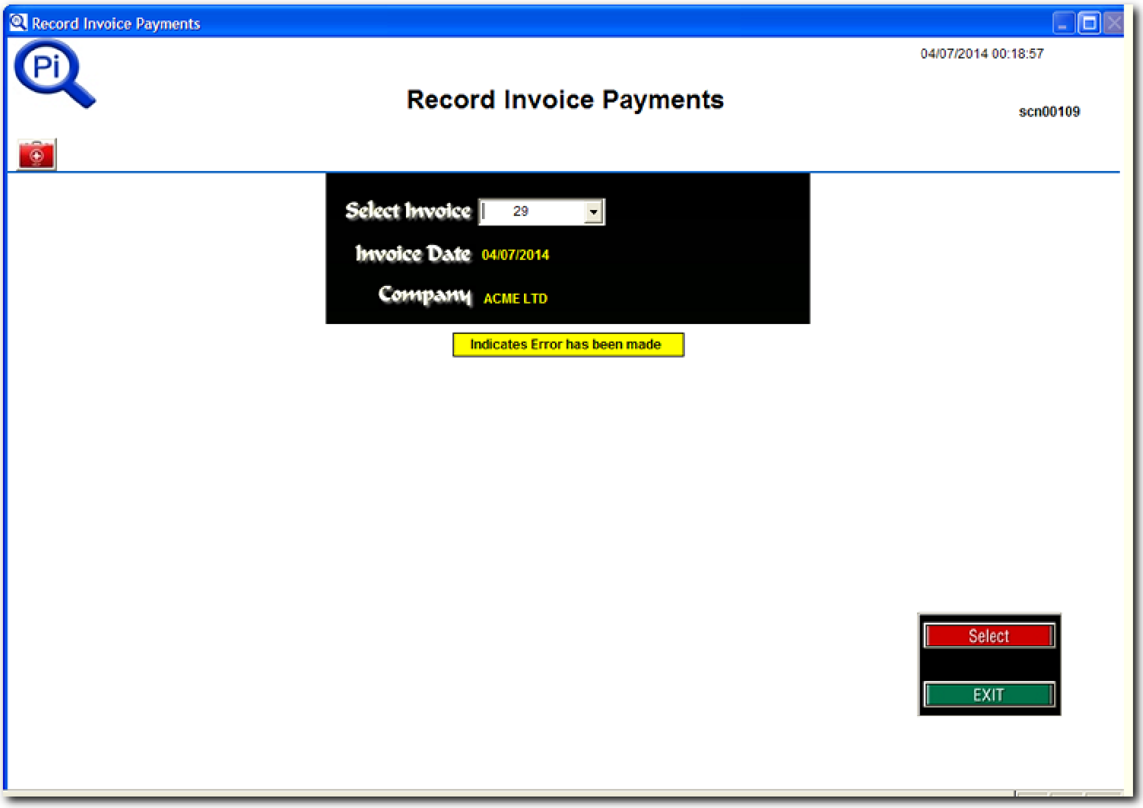


Here you may enter details of new Smartphone models. You should enter the name of the Smartphone model. If errors are made, the background of the input will turn Yellow to indicate an error. If a duplicate (existing) Smartphone model Name entry is attempted an error message will appear indicating this error. Clicking **EXIT** will return you to the Technology Menu.

Below the questions is a Print Button which allows you to print a list of all the models available. Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk

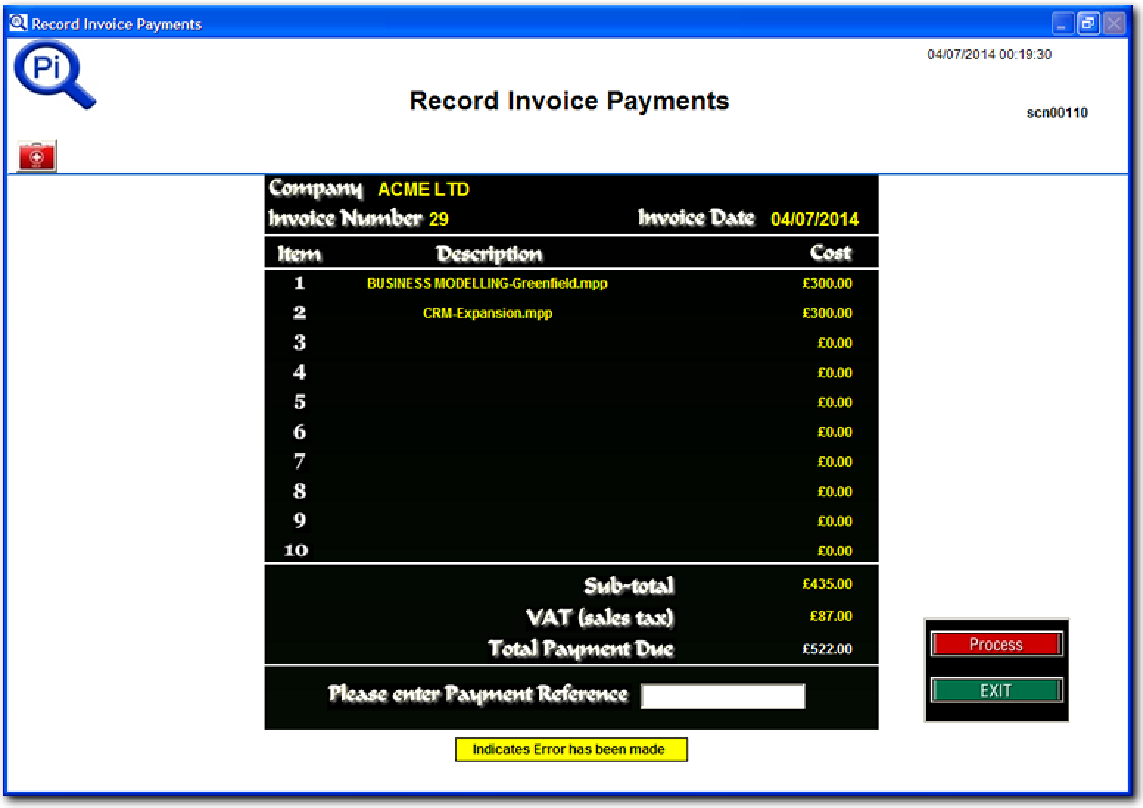

Zoom
Smartphone Models
04/07/2014
Model Name
ACER ALLEGRO
ACER BETOUCH E140
ACER CLOUDMOBILE S500
ACER ICONIA TAB A1-810
ACER ICONIA TAB A210
ACER ICONIA TAB A3
ACER ICONIA TAB A500
ACER ICONIA TAB B1-A71
ACER LIQUID C1
ACER LIQUID E1
ACER LIQUID E2
ACER LIQUID GALLANT DUO
ACER LIQUID GALLANT E350
ACER LIQUID GLOW E330
ACER LIQUID MINI E310
ACER LIQUID S1
ACER LIQUID S2
ACER LIQUID Z110
ACER LIQUID Z2
ACER LIQUID Z3
ALCATEL ONE TOUCH TAB 8 HD
ALCATEL ONE TOUCH TRIBE 3040D
ALCATEL OT 209
ALCATEL OT-217
ALCATEL OT-282
ALCATEL OT-306
ALCATEL OT-358
ALCATEL OT-602
ALCATEL OT-606 ONE TOUCH CHAT
ALCATEL OT-665
ALCATEL OT-708 ONE TOUCH MINI
ALCATEL OT-808
Page 1
Continuous Information Advantage
Saved to Disk Filename:

2.80 Record Invoice Payments



Here you can record payments made against invoices. You must select the invoice to process from a drop down list. This list only displays Invoices that are unpaid. The invoice Date and Company name are displayed.
Clicking **EXIT** will return you to the Account Options Menu.

To proceed you should click the Select button and the following screen will be displayed:



Here the details of the selected invoice are displayed for clarification. You should enter the payment reference e.g. cheque number and then click the process button.

A message then appears indicating the payment has been recorded. You should then press the **EXIT** button to return to the Account Options Menu. How Do I - Account Options Menu

On both screens if errors are made the offending input background will turn yellow and a message indicating the nature of the error will appear.

2.81 Financial Details

This option is only available in the Multi-Company Version.

Here you are presented with a Financial Summary of the currently selected company. The following are displayed:

COMPANY (account) NUMBER
INDUSTRY
REGISTERED SINCE DATE
NUMBER OF CONTACTS (Users)
VAT TYPE CODE AND PERCENTAGE
BASE CURRENCY
ANY DISCOUNT GIVEN
DATE OF LAST INVOICE
TOTAL INVOICED (EXCLUDING VAT) TO DATE
TOTAL VAT
TOTAL INVOICED (INCLUDING VAT)
TOTAL PAID TO DATE
AMOUNT OF PAYMENTS OUTSTANDING

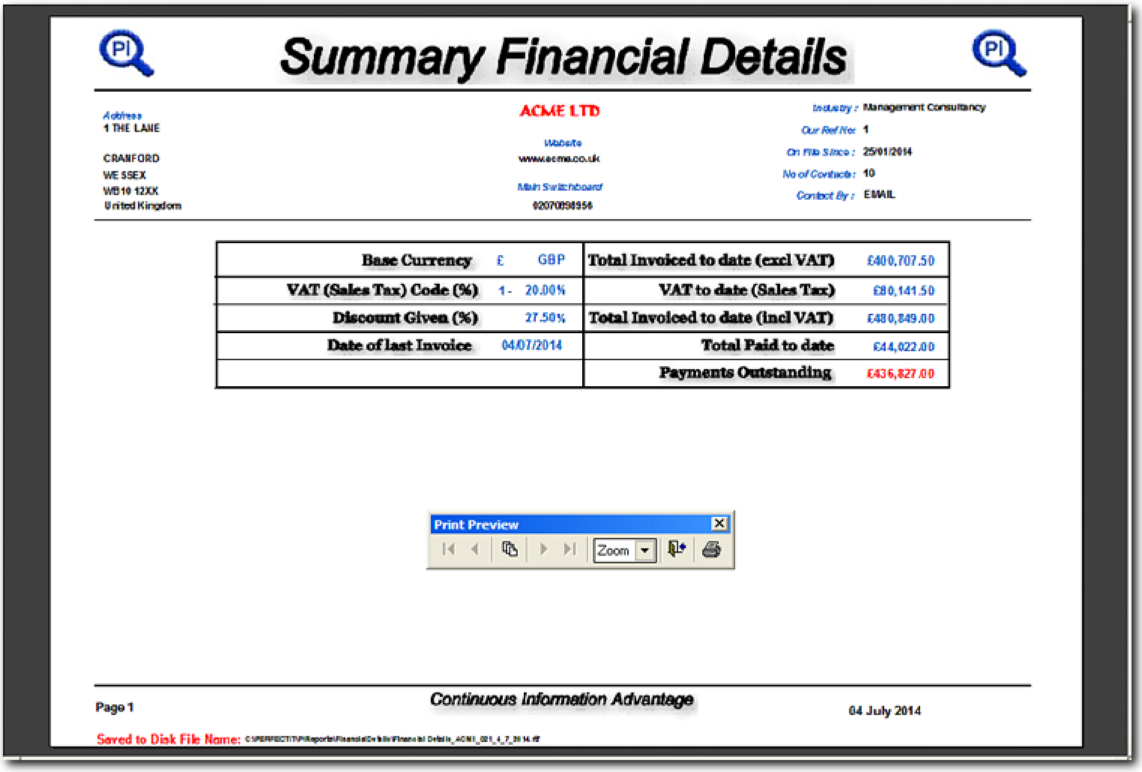
At the bottom of the screen are **5** buttons:

Click buttons below for details of these functions.
DETAILS
INVOICES
PAYMENTS
OWED

Clicking **EXIT** will return you to the Account Options Menu

Account Options Menu   How Do I - Account Options Menu

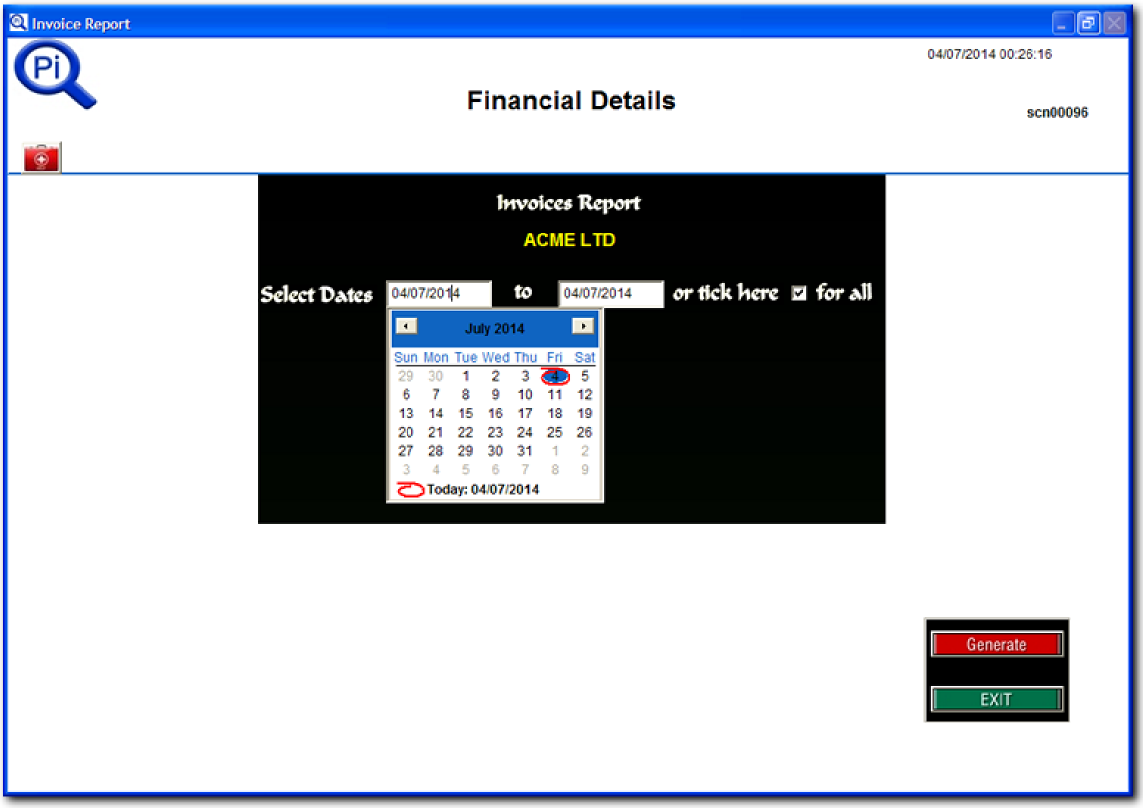
2.82 Financial Details Report



This report is also saved in Word Processor format to local disk, so that it can be reviewed at a later time when necessary.

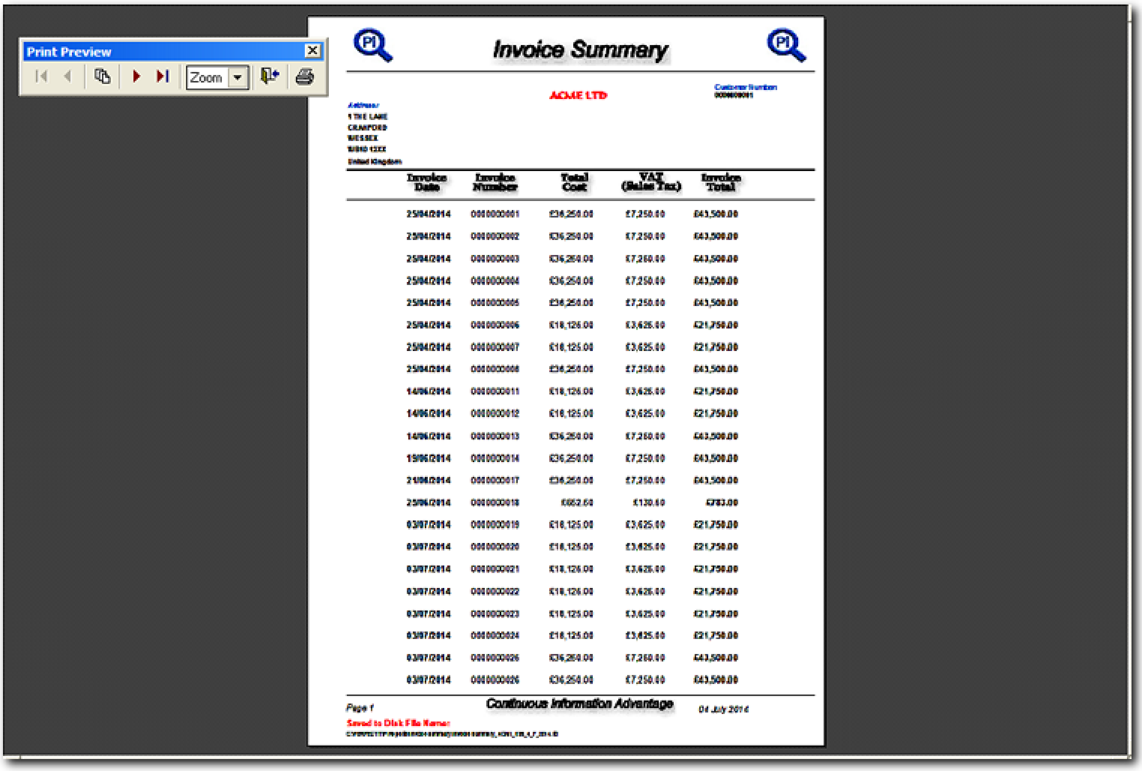
After the report has displayed you are returned to the Financial Details Screen

2.83 Financial Details - Invoices



Here you can select to generate a report of Invoices for the selected User (company).Selection can be made either by selecting a date range by use of interactive calendars on screen or ALL invoices can be selected by ticking the box indicated on screen.

You should then click the GENERATE button and an Invoice Summary Report is produced on screen:

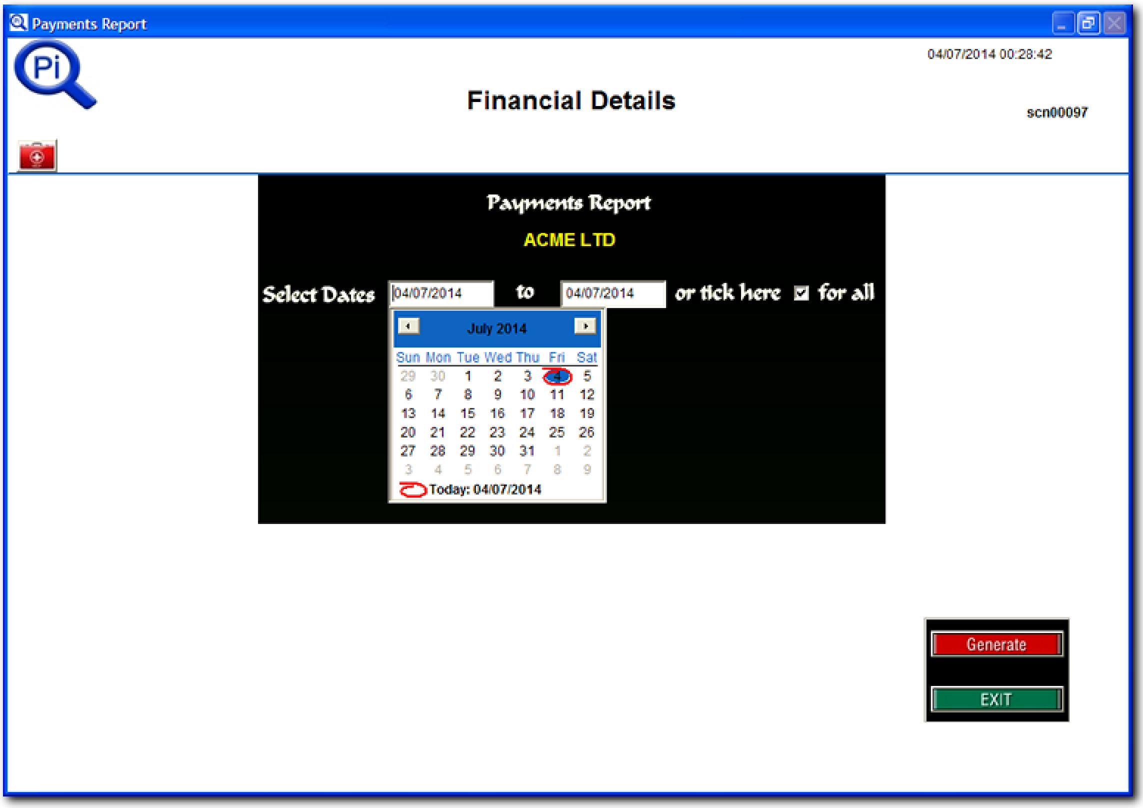


Invoice Date	Invoice Number	Total Cost	VAT (Sales Tax)	Invoice Total
25/04/2014	0000000001	£36,250.00	£7,250.00	£43,500.00
25/04/2014	0000000002	£36,250.00	£7,250.00	£43,500.00
25/04/2014	0000000003	£36,250.00	£7,250.00	£43,500.00
25/04/2014	0000000004	£36,250.00	£7,250.00	£43,500.00
25/04/2014	0000000005	£36,250.00	£7,250.00	£43,500.00
25/04/2014	0000000006	£18,125.00	£3,625.00	£21,750.00
25/04/2014	0000000007	£18,125.00	£3,625.00	£21,750.00
25/04/2014	0000000008	£36,250.00	£7,250.00	£43,500.00
14/06/2014	0000000011	£18,125.00	£3,625.00	£21,750.00
14/06/2014	0000000012	£18,125.00	£3,625.00	£21,750.00
14/06/2014	0000000013	£36,250.00	£7,250.00	£43,500.00
19/06/2014	0000000014	£36,250.00	£7,250.00	£43,500.00
21/06/2014	0000000017	£36,250.00	£7,250.00	£43,500.00
25/06/2014	0000000018	£652.50	£130.50	£783.00
03/07/2014	0000000019	£18,125.00	£3,625.00	£21,750.00
03/07/2014	0000000020	£18,125.00	£3,625.00	£21,750.00
03/07/2014	0000000021	£18,125.00	£3,625.00	£21,750.00
03/07/2014	0000000022	£18,125.00	£3,625.00	£21,750.00
03/07/2014	0000000023	£18,125.00	£3,625.00	£21,750.00
03/07/2014	0000000024	£18,125.00	£3,625.00	£21,750.00
03/07/2014	0000000025	£36,250.00	£7,250.00	£43,500.00
03/07/2014	0000000026	£36,250.00	£7,250.00	£43,500.00

The report can be reviewed on screen using the print preview bar provided.
This report is also saved in Word Processor format to local disk, so that it may be reviewed at a later time when necessary.

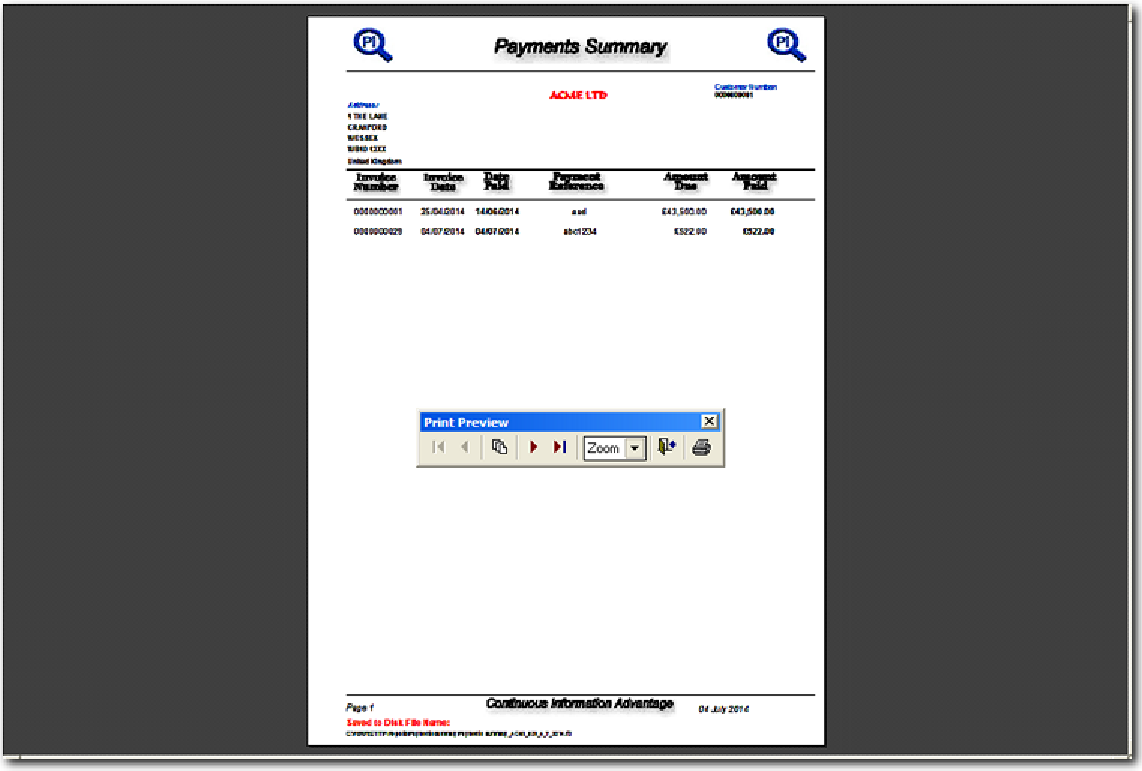
Clicking **EXIT** returns you to the Financial Details Main screen

2.84 Financial Details - Payments



Here you can select to generate a report of Payments received from the selected User (company).Selection can be made either by selecting a date range by use of interactive calendars on screen or ALL Payments can be selected by ticking the box indicated on screen.

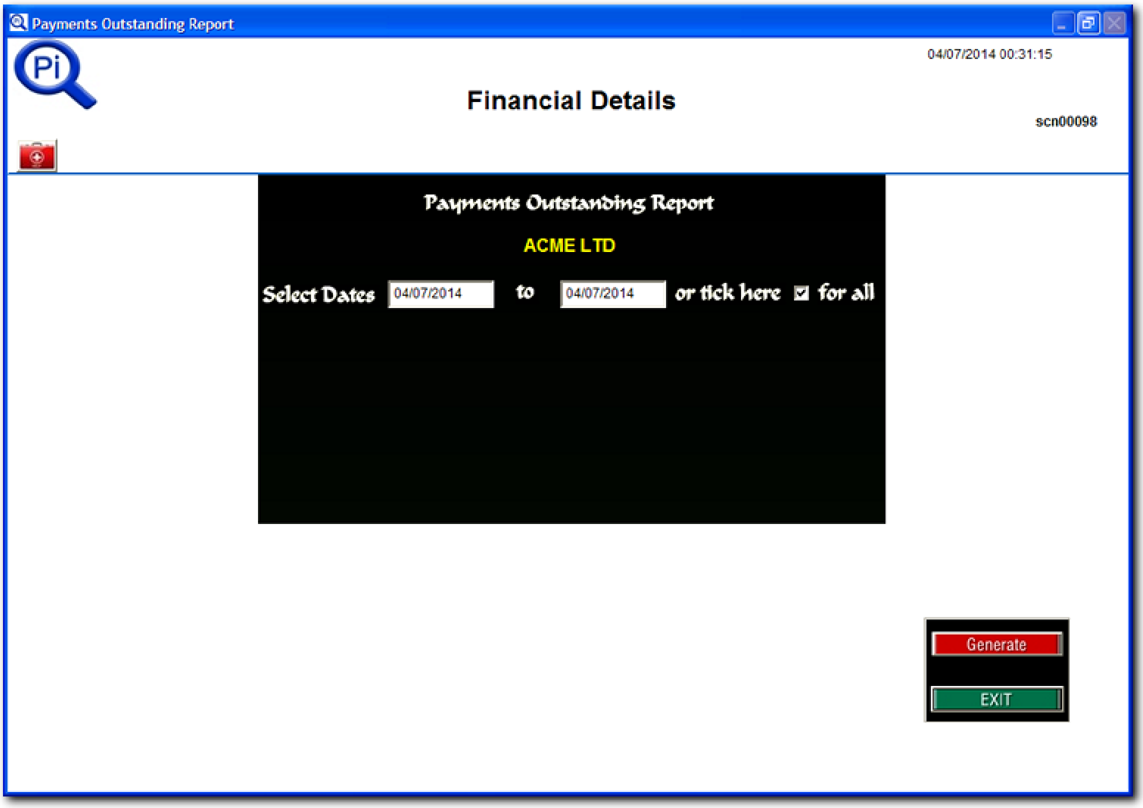
You should then click the GENERATE button and the following Payment Summary Report is produced on screen:



The report can be reviewed on screen using the print preview bar provided.
This report is also saved in Word Processor format to local disk, so that it can be reviewed at a later time when necessary.

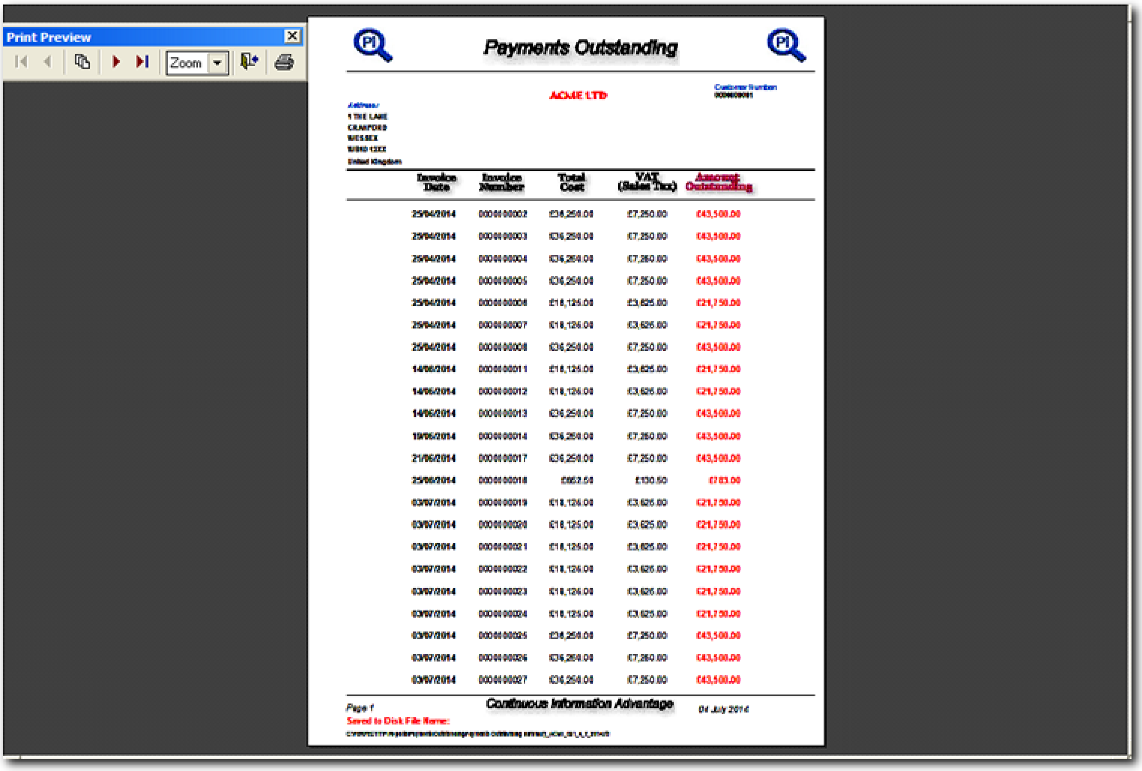
Clicking **EXIT** returns you to the Financial Details Main screen

2.85 Financial Details - Payments Owed



Here you can select to generate a report of Outstanding Payments due from the selected User (company).Selection can be made either by selecting a date range by use of interactive calendars on screen or ALL Payments due can be selected by ticking the box indicated on screen.

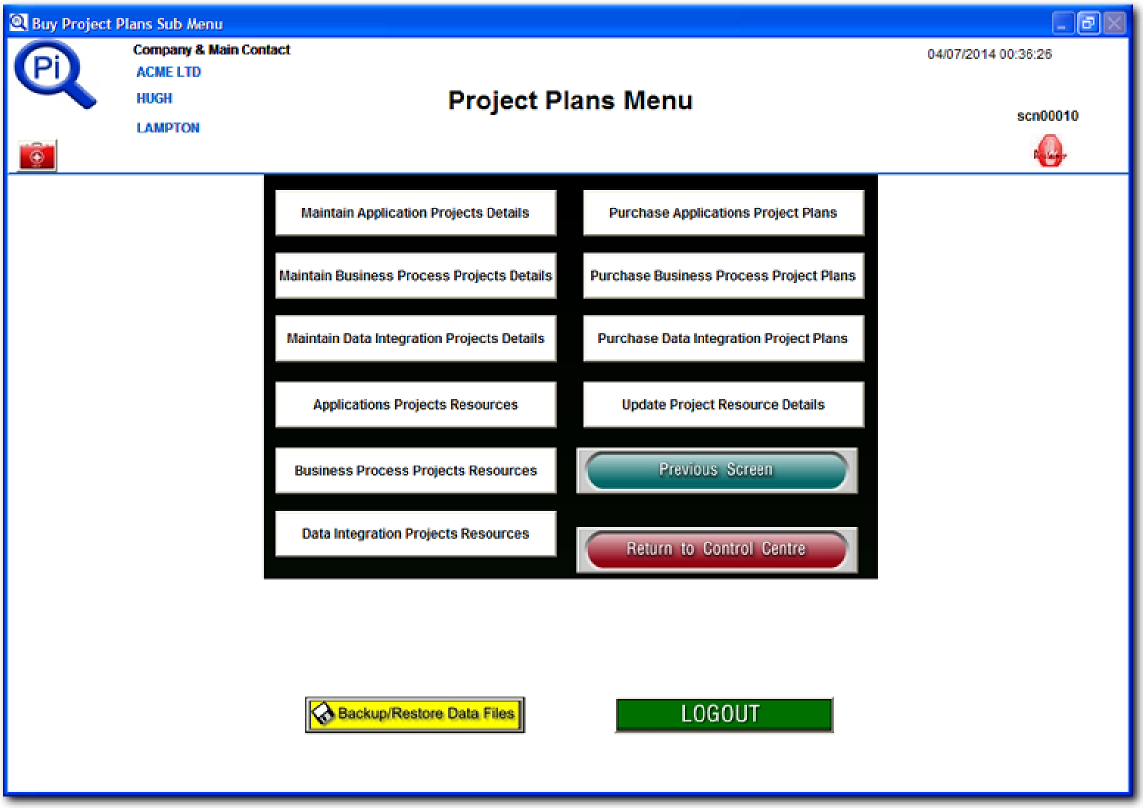
You should then click the GENERATE button and the following Payments Outstanding Report is produced on screen:



The report can be reviewed on screen using the print preview bar provided.
This report is also saved in Word Processor format to local disk, so that it can be reviewed at a later time when necessary.

Clicking **EXIT** returns you to the Financial Details Main screen

2.86 Project Plans Menu

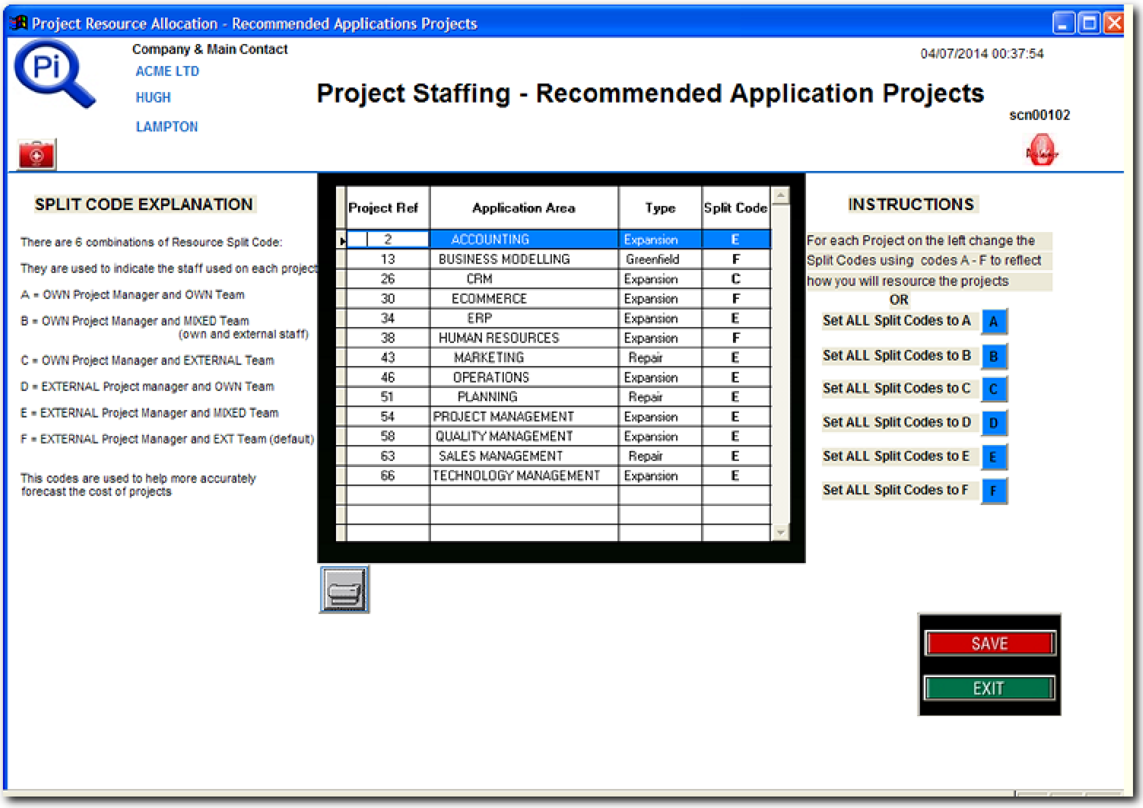


This Menu allows you to maintain all the aspects that relate to Information Projects.

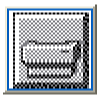
The following options are available:
Maintain Applications Projects Details
Maintain Business Processes Projects Details
Maintain Data Integration Projects Details
Applications Projects Resources
Business Process Projects Resources
Data Integration Projects Resources
Buy Application Project Plans
Buy Business Process Project Plans
Buy Data Integration Project Plans
Update Project Resource Details

Clicking Previous Screen will return you to the Account Options Menu

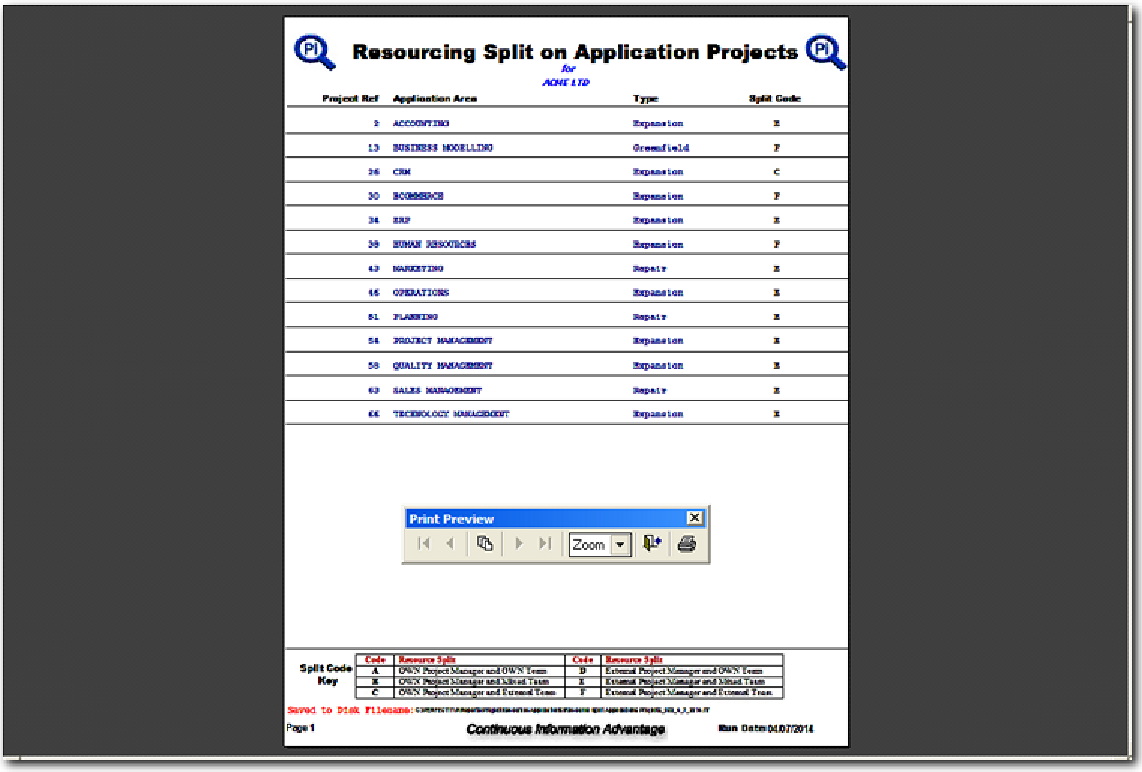
2.87 Applications Projects Resources



This screen is used to identify the split of staffing to be used on individual projects that Pi has recommended. This split is between using your own staff and external resources, e.g. subcontractors. For each project it is necessary to indicate which split code A - F is to be used by changing the value in the Split Code Column.
It is also possible to change all projects to the same code by clicking the appropriate button as indicated. When input is complete the "**SAVE**" button should be pressed and a message will appear indicating that the Project File has been updated. You will then be returned to the Project Plans Menu



There is a printer icon on screen and clicking this will produce a Report of Salaries and Resourcing Split on Application Projects An example is shown below. This report is also saved to disk and can be reviewed using the Reports saved to disk function.



Resourcing Split on Application Projects
for
ACME LTD

Project Ref	Application Area	Type	Split Code
2	ACCOUNTING	Expansion	E
13	BUSINESS MODELLING	Greenfield	F
26	CRM	Expansion	C
30	ECOMMERCE	Expansion	F
34	ERP	Expansion	E
39	HUMAN RESOURCES	Expansion	F
43	MARKETING	Repair	E
46	OPERATIONS	Expansion	E
51	PLANNING	Repair	E
54	PROJECT MANAGEMENT	Expansion	E
58	QUALITY MANAGEMENT	Expansion	E
63	SALES MANAGEMENT	Repair	E
66	TECHNOLOGY MANAGEMENT	Expansion	E

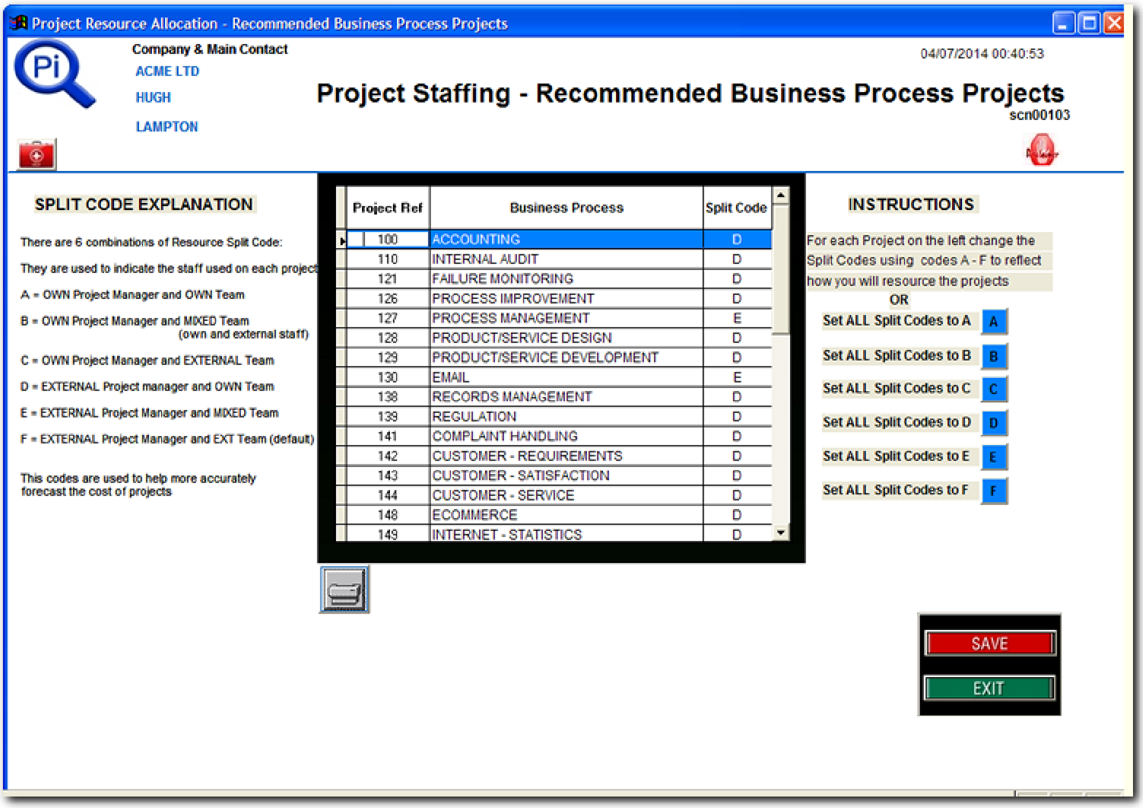
Split Code Key

Code	Resource Split	Code	Resource Split
A	OWN Project Manager and OWN Team	D	External Project Manager and OWN Team
B	OWN Project Manager and Mixed Team	E	External Project Manager and Mixed Team
C	OWN Project Manager and External Team	F	External Project Manager and External Team

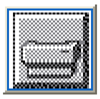
Saved to Disk Filename: [illegible]

Page 1 Continuous Information Advantage Run Date: 04/07/2014

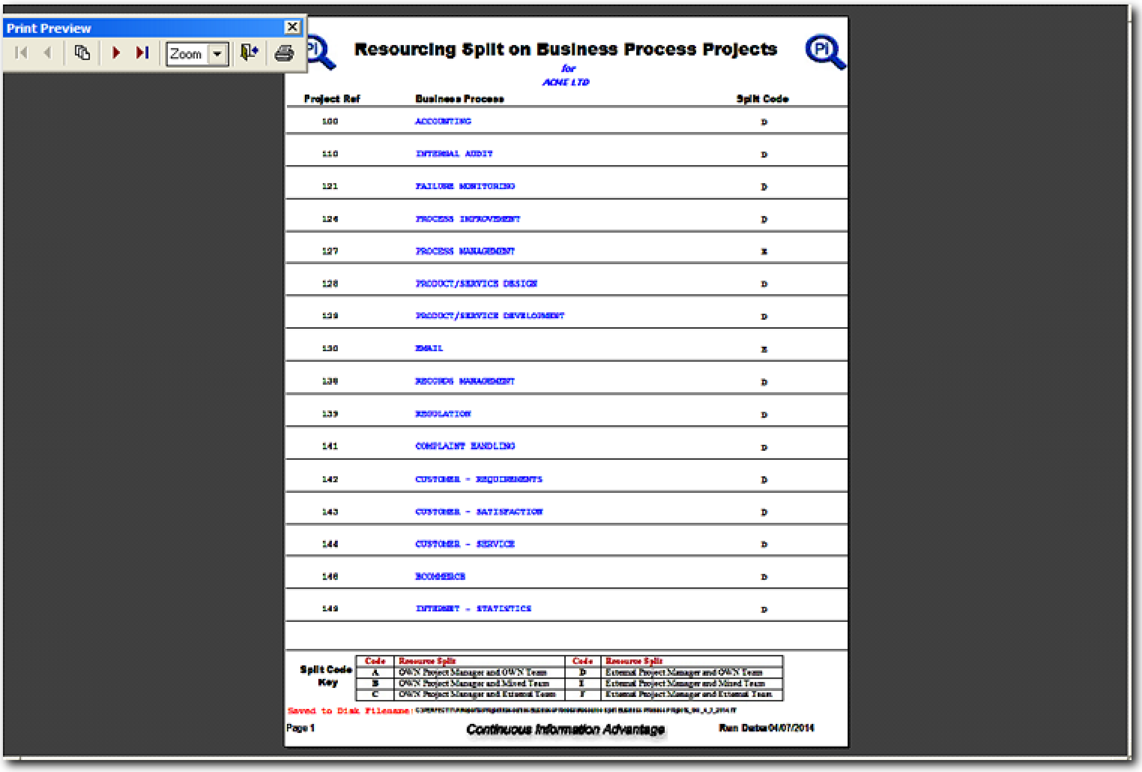
2.88 Business Process Projects Resources



This screen is used to identify the split of staffing to be used on individual projects that Pi has recommended. This split is between using your own staff and external resources, e.g. subcontractors. For each project it is necessary to indicate which split code A - F is to be used by changing the value in the Split Code Column.
It is also possible to change all projects to the same code by clicking the appropriate button as indicated. When input is complete the "**SAVE**" button should be pressed and a message will appear indicating that the Project File has been updated. You will then be returned to the Project Plans Menu



There is a printer icon on screen and clicking this will produce a Report of Salaries and Resourcing Split on Business Process Projects An example is shown below. This report is also saved to disk and can be reviewed using the Reports saved to disk function.



Resourcing Split on Business Process Projects
for
ACME LTD

Project Ref	Business Process	Split Code
100	ACCOUNTING	D
110	INTERNAL AUDIT	D
121	FAILURE MONITORING	D
124	PROCESS IMPROVEMENT	D
127	PROCESS MANAGEMENT	E
128	PRODUCT/SERVICE DESIGN	D
129	PRODUCT/SERVICE DEVELOPMENT	D
130	EMAIL	E
138	RECORDS MANAGEMENT	D
139	REGULATION	D
141	COMPLAINT HANDLING	D
142	CUSTOMER - REQUIREMENTS	D
143	CUSTOMER - SATISFACTION	D
144	CUSTOMER - SERVICE	D
146	ECOMMERCE	D
149	INTERNET - STATISTICS	D

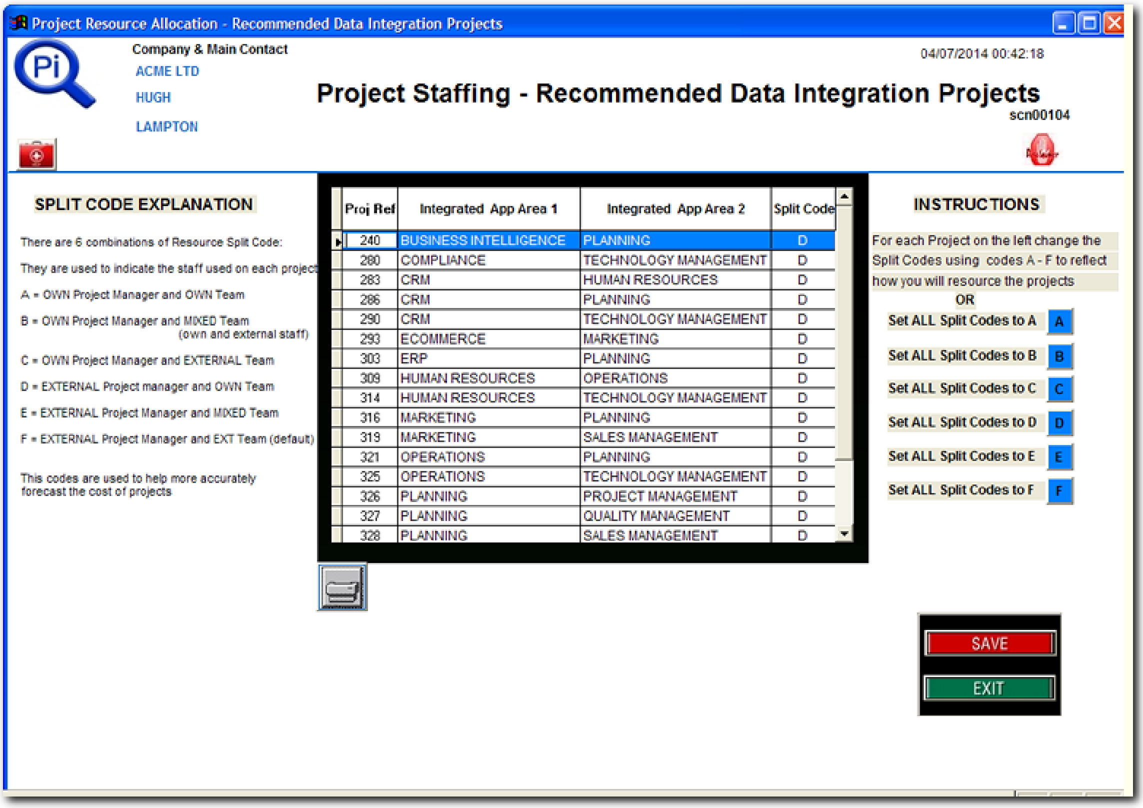
Split Code Key

Code	Resource Split	Code	Resource Split
A	OWN Project Manager and OWN Team	D	External Project Manager and OWN Team
B	OWN Project Manager and Mixed Team	E	External Project Manager and Mixed Team
C	OWN Project Manager and External Team	F	External Project Manager and External Team

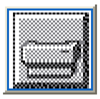
Saved to Disk Filename: [illegible]

Page 1 Continuous Information Advantage Run Date 04/07/2014

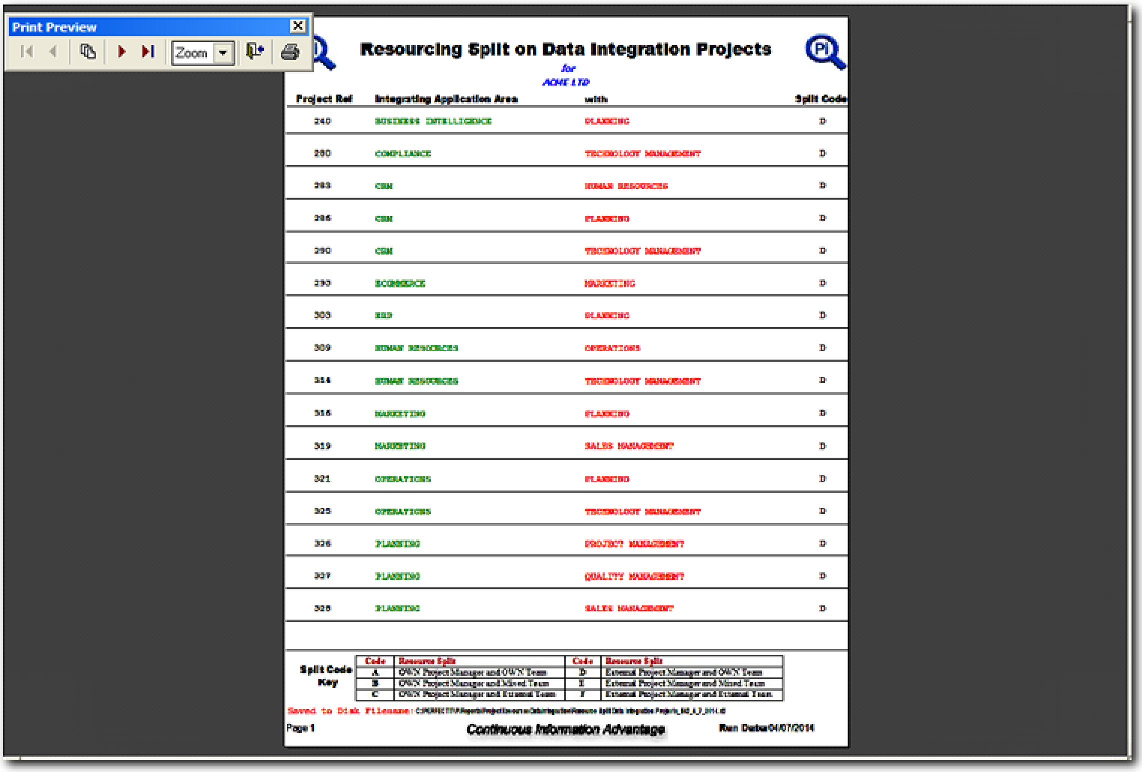
2.89 Data Integration Projects Resources



This screen is used to identify the split of staffing to be used on individual projects that Pi has recommended. This split is between using your own staff and external resources, e.g. subcontractors. For each project it is necessary to indicate which split code A - F is to be used by changing the value in the Split Code Column.
It is also possible to change all projects to the same code by clicking the appropriate button as indicated. When input is complete the "**SAVE**" button should be pressed and a message will appear indicating that the Project File has been updated. You will then be returned to the Project Plans Menu



There is a printer icon on screen and clicking this will produce a Report of Salaries and Resourcing Split on Data Integration Projects An example is shown below. This report is also saved to disk and can be reviewed using the Reports saved to disk function.



Resourcing Split on Data Integration Projects

for

ACME LTD

Project Ref	Integrating Application Area	with	Split Code
240	BUSINESS INTELLIGENCE	PLANNING	D
280	COMPLIANCE	TECHNOLOGY MANAGEMENT	D
283	CRM	HUMAN RESOURCES	D
286	CRM	PLANNING	D
290	CRM	TECHNOLOGY MANAGEMENT	D
293	ECOMMERCE	MARKETING	D
303	ERP	PLANNING	D
309	HUMAN RESOURCES	OPERATIONS	D
314	HUMAN RESOURCES	TECHNOLOGY MANAGEMENT	D
316	MARKETING	PLANNING	D
319	MARKETING	SALES MANAGEMENT	D
321	OPERATIONS	PLANNING	D
325	OPERATIONS	TECHNOLOGY MANAGEMENT	D
326	PLANNING	PROJECT MANAGEMENT	D
327	PLANNING	QUALITY MANAGEMENT	D
328	PLANNING	SALES MANAGEMENT	D

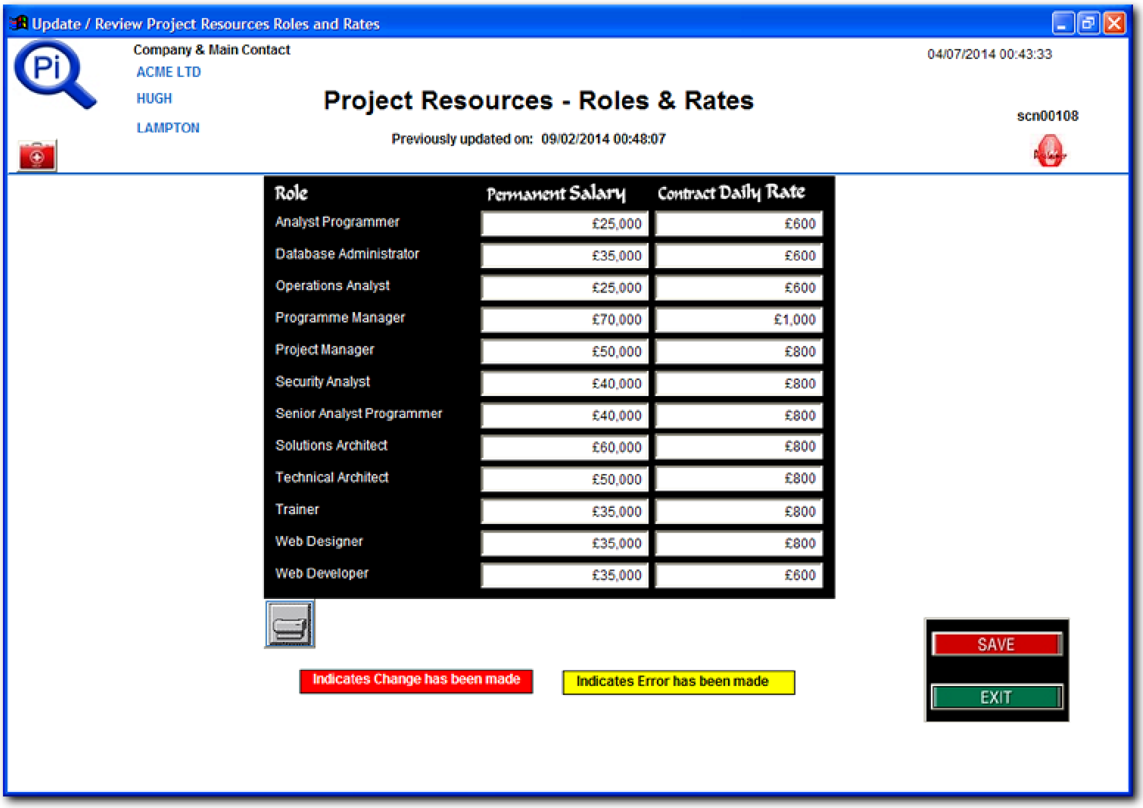
Split Code Key

Code	Resource Split	Code	Resource Split
A	OWN Project Manager and OWN Team	D	External Project Manager and OWN Team
B	OWN Project Manager and Mixed Team	E	External Project Manager and Mixed Team
C	OWN Project Manager and External Team	F	External Project Manager and External Team

Saved to Disk Filename: [illegible]

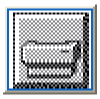
Page 1 Continuous Information Advantage Run Date 04/07/2014

2.90 Update Project Resource Details

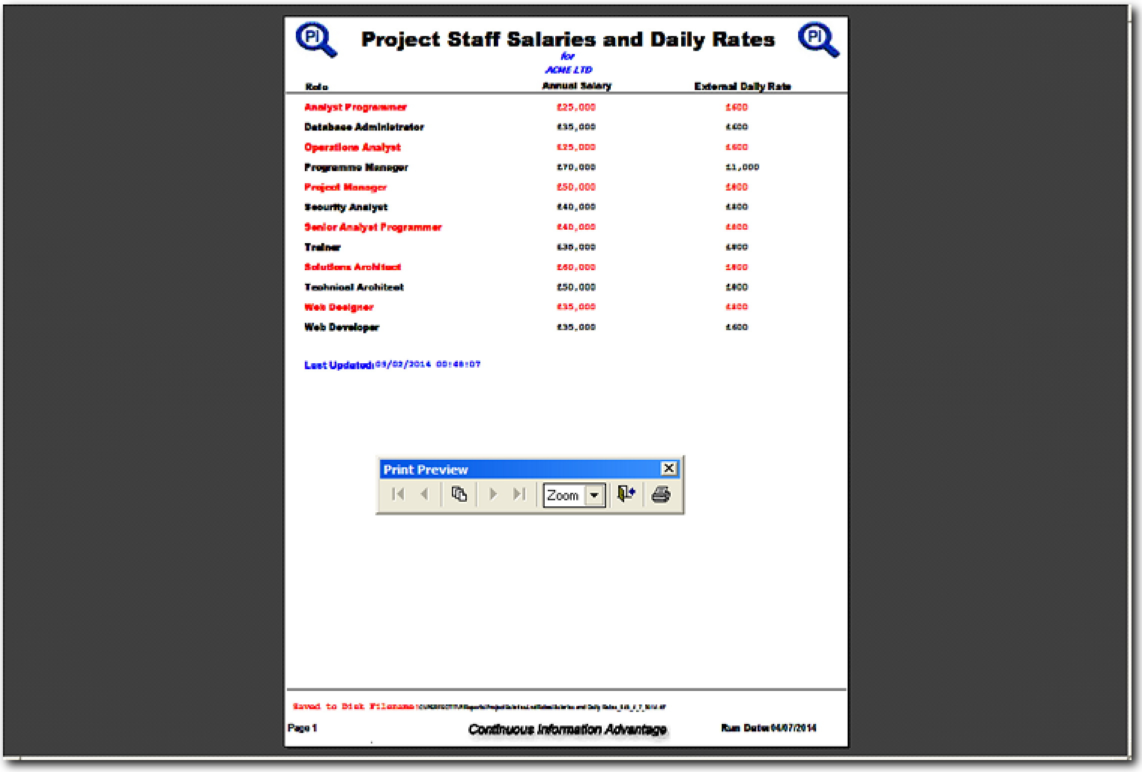


This screen is used to update the Salaries and Daily contract rates applicable to Project Team Members. This information is used to accurately forecast the cost of projects.
For each role a Salary figure, which is the basic salary received by permanent staff performing this job within the organisation and a Daily Rate which the organisation pays for external resources fulfilling these roles on projects, should be input.

When input has been completed the **SAVE** button should be clicked to update the record.



There is a printer icon on screen and clicking this will produce a Report of Salaries and Daily Rates of Project Resources, viz; personnel. An example is shown below. This report is also saved to disk and can be reviewed using the Reports saved to disk function.



Project Staff Salaries and Daily Rates
for
ACME LTD

Role	Annual Salary	External Daily Rate
Analyst Programmer	£25,000	£600
Database Administrator	£35,000	£600
Operations Analyst	£25,000	£600
Programme Manager	£70,000	£1,000
Project Manager	£50,000	£800
Security Analyst	£40,000	£400
Senior Analyst Programmer	£40,000	£800
Trainer	£30,000	£400
Solutions Architect	£60,000	£800
Technical Architect	£50,000	£800
Web Designer	£35,000	£400
Web Developer	£35,000	£600

Last Updated: 03/02/2014 00:48:07

Print Preview
Zoom

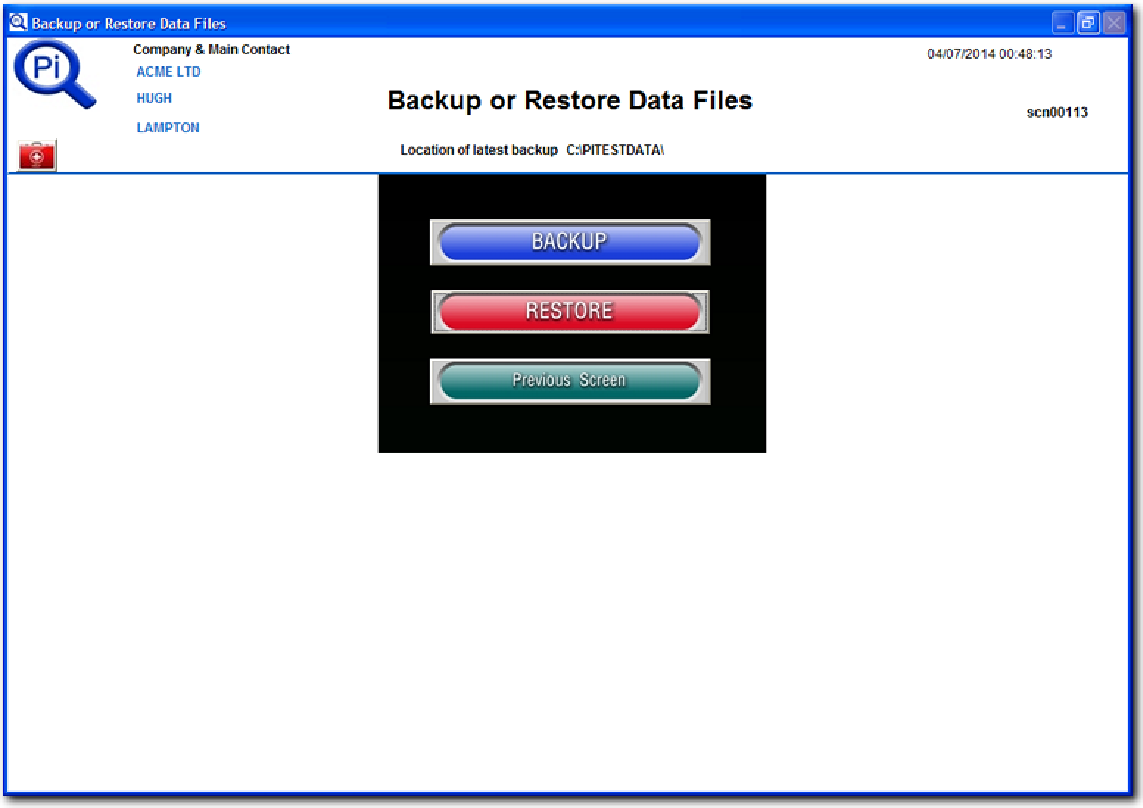
Saved to Disk Filename:
Page 1 Continuous Information Advantage Run Date 04/07/2014

Clicking EXIT will return you to the Project Plans Menu

2.91 Data File BACKUP & RESTORE

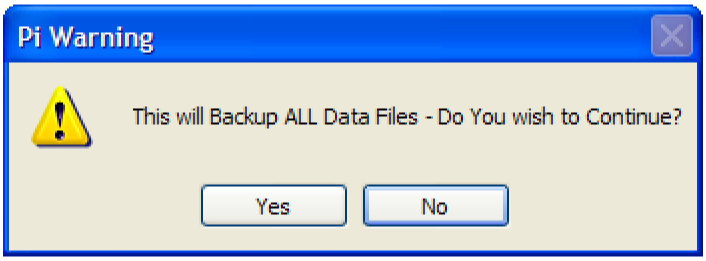
When you wish to backup or restore the data files of the system , you should click the following button:

The following screen will appear:

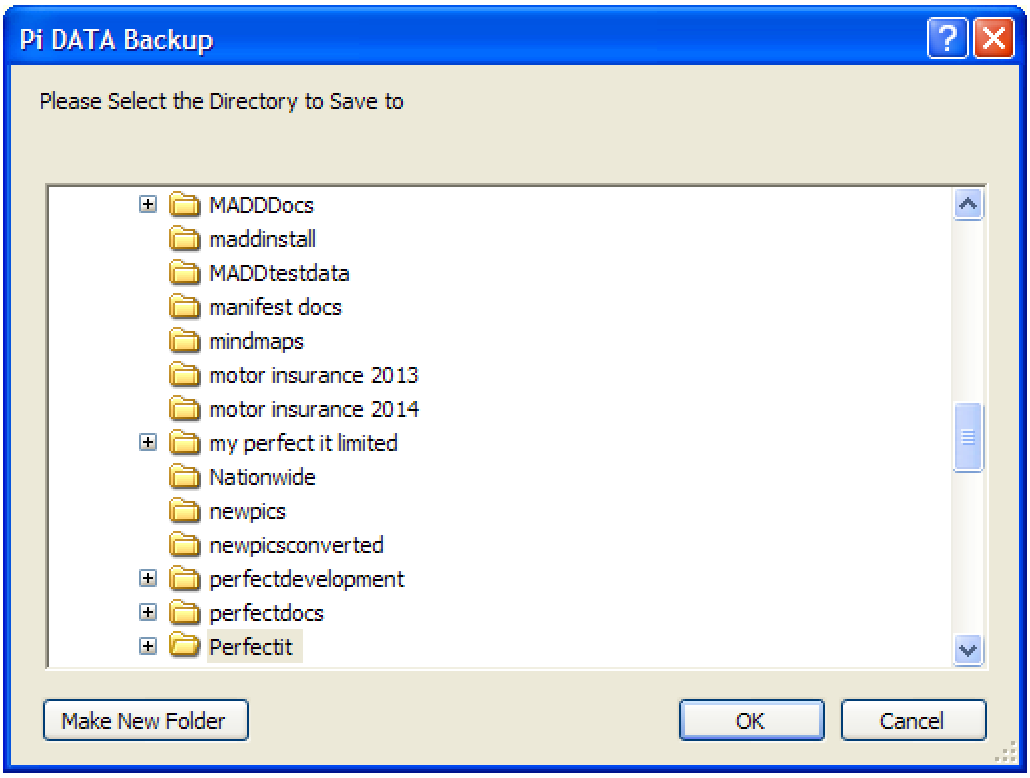


Here the you may backup or restore the Database files of Pi for security purposes. The location of the latest backup you have taken is displayed on screen.
Clicking the **Previous Screen** button returns you to the previous menu from which you called the backup / restore procedure.

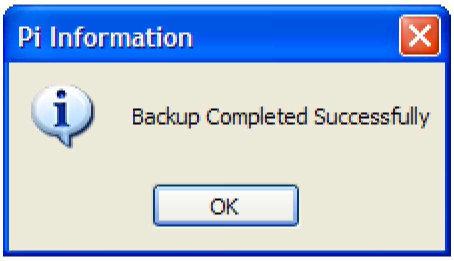
BACKUP


Pi Warning
This will Backup ALL Data Files - Do You wish to Continue?
Yes
No

When selected you will first receive a message prompt asking you if you wish to continue with the Backup. If you reply “No” a message appears informing you that you have abandoned the backup. If you reply “Yes” the following screen appears:



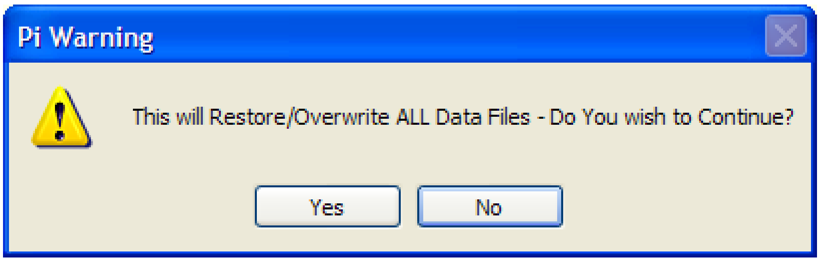
Here you may select the location where you want the data files saved from a directory selection list. When you have selected the directory/folder you should click **OK** and the backup will be created. A message will then appear on screen indicating a successful backup. **It is recommended that you backup to an external device e.g. CD or DVD drive in case of problems with your PC or server.**


Pi Information
Backup Completed Successfully
OK

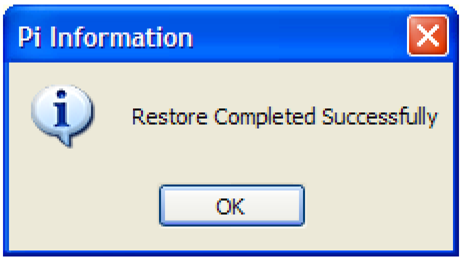
RESTORE

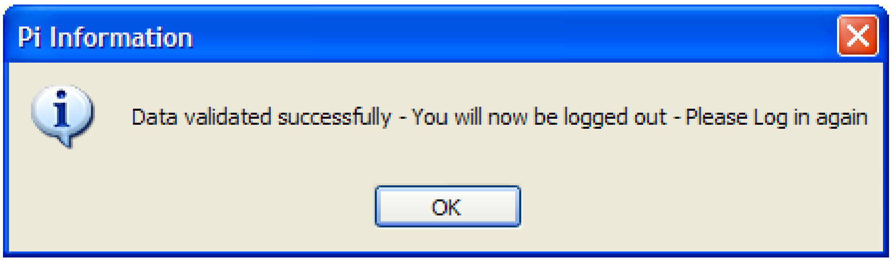
This will restore the latest backup of your data files that you have taken.

Note: Before attempting to restore data files please ensure that if you made your last data backup to an external drive e.g. a CD or DVD, that the correct CD/DVD is loaded in the CD/DVD drive before trying to restore the data. If you are keeping sequential backups please ensure that you place the CD/DVD you wish to restore in the CD/DVD Drive.



When selected you will first receive a message prompting you if you wish to continue with the Restore. If you reply “No” a message appears informing you that you have abandoned the restore. If you reply “Yes” the latest data files are restored. A message appears on screen indicating a successful restore.

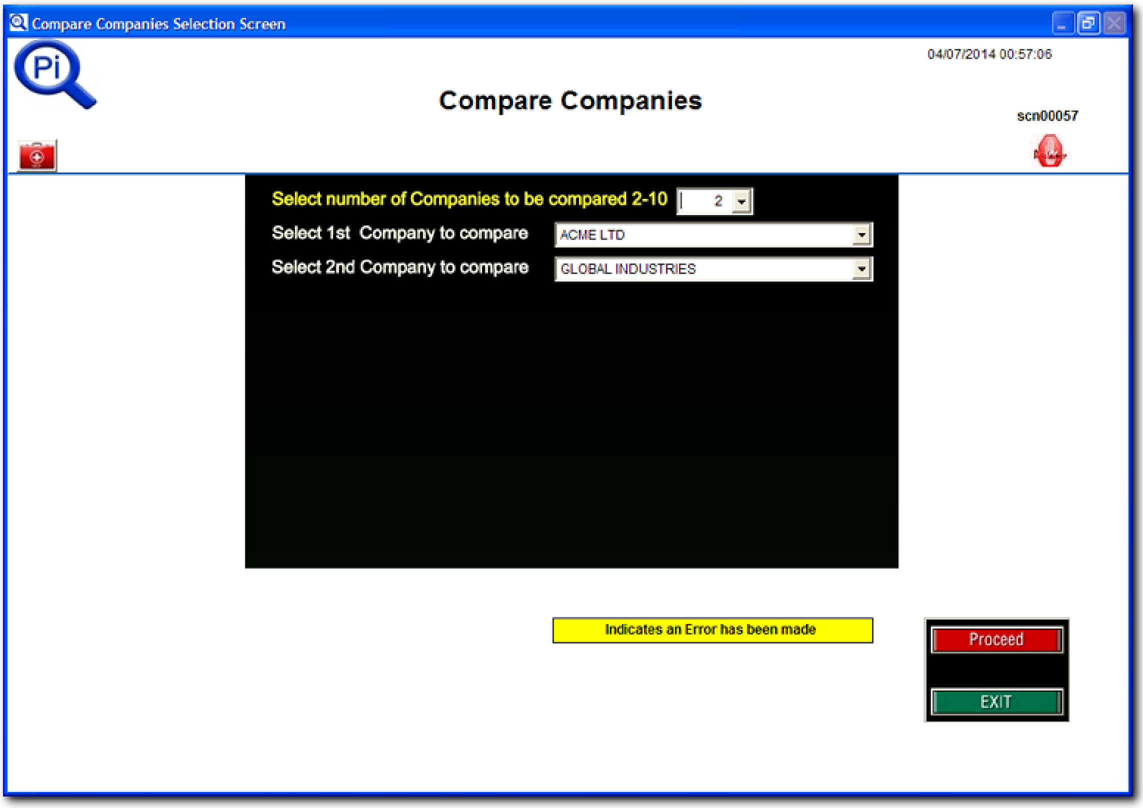

Pi Information
Restore Completed Successfully
OK



You will then be logged out and must log in again as this ensures data integrity and should sign in again.

2.92 Compare Companies

Selection of this option from the Add-Ons menu allows you to compare the relative Business Effectiveness across all Application Areas of up to 10 Companies simultaneously.

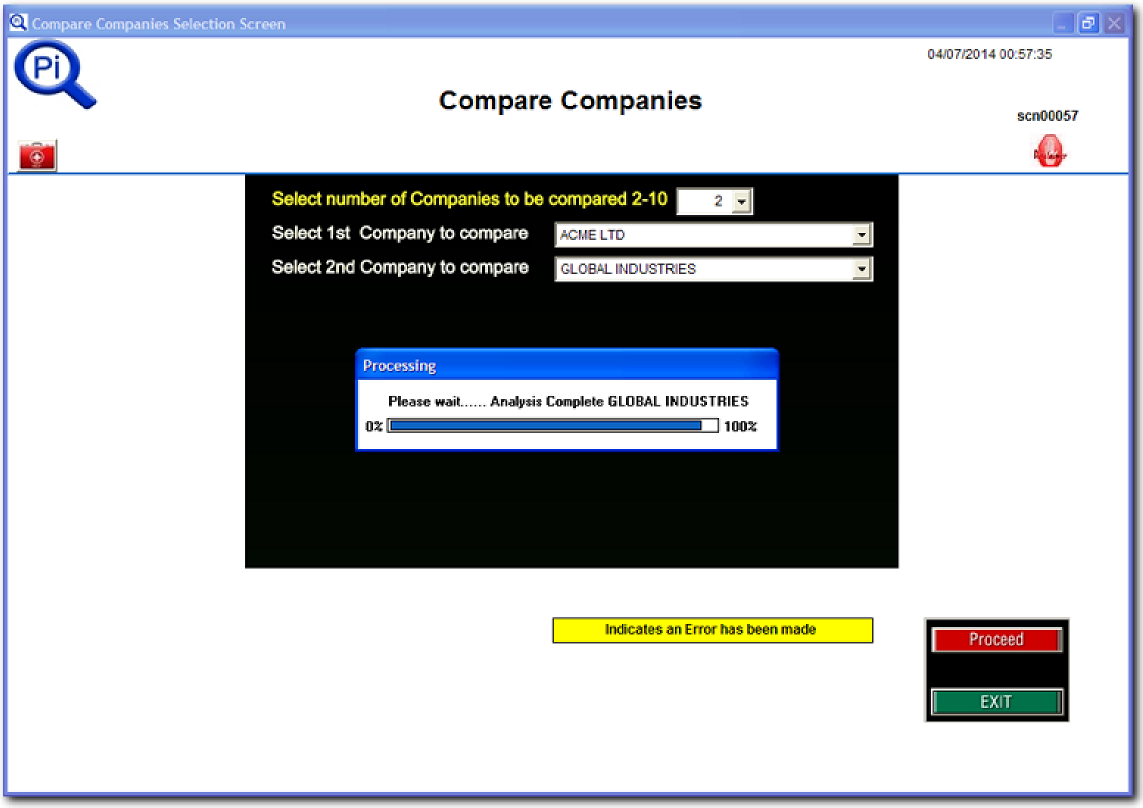


On this screen you must select the number of Companies to be compared by using the drop down selection list provided.

The system will display further drop down selection lists to select the companies to be compared.

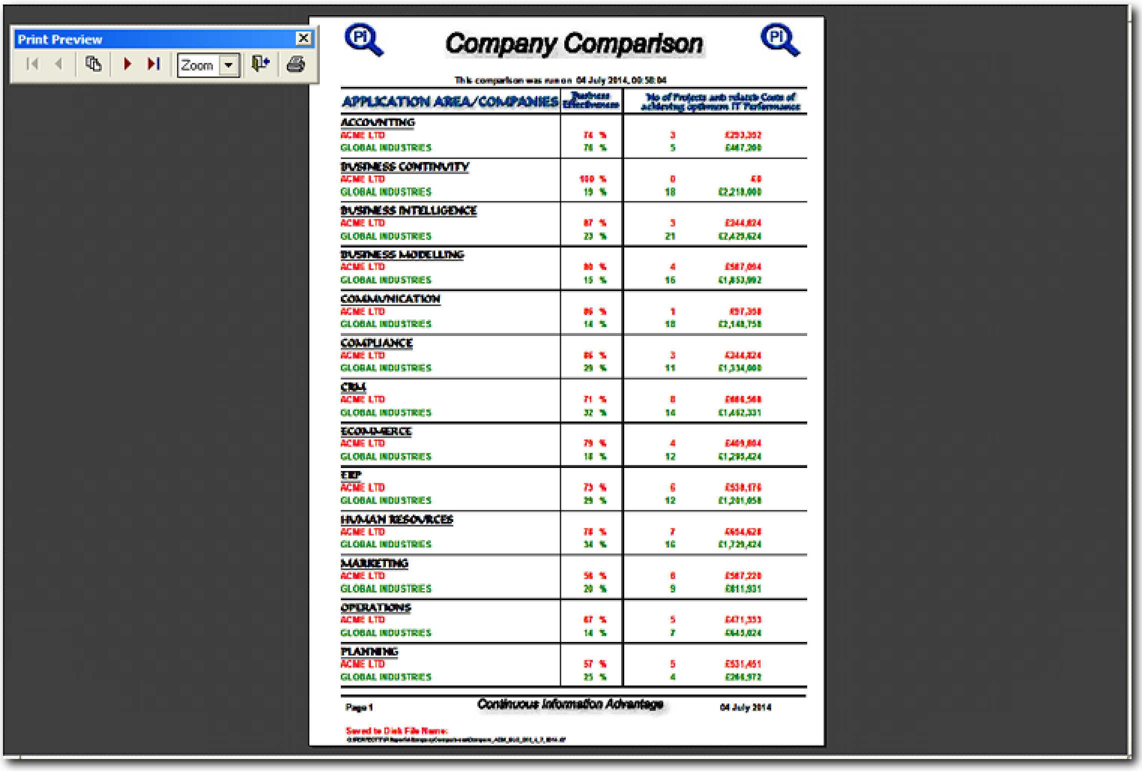
Clicking **EXIT** returns you to the ADD-ONS menu

When selection has been made you should click the **Proceed** key to start the analysis. A progress bar appears indicating the state of analysis reached.

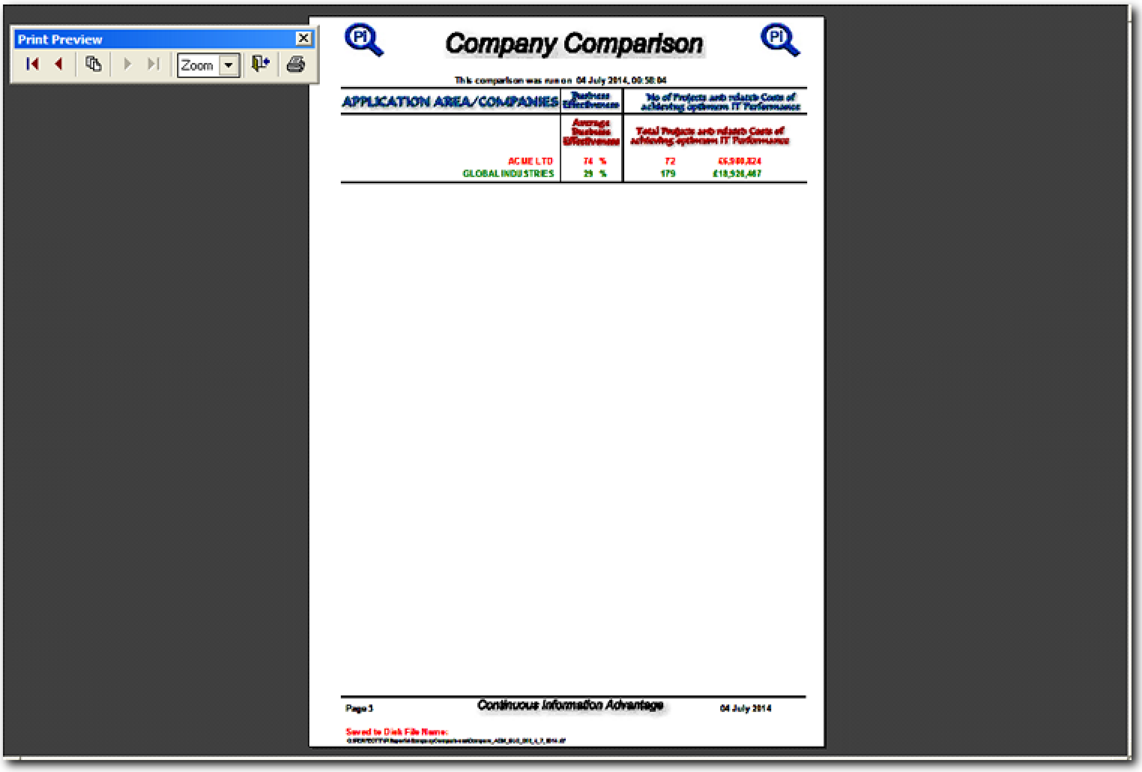


When the analysis is complete the following report, including summary page, is produced on screen, where it can be viewed and/or printed. The report is also saved to disk in Word Processor format.

Detail

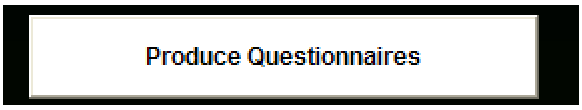


Summary


Print Preview
Zoom
Company Comparison
APPLICATION AREA/COMPANIES
ACME LTD
GLOBAL INDUSTRIES
Continuous Information Advantage

2.93 Create Blank Questionnaires

In order to facilitate their manual completion by individuals or by interview the blank questionnaires of the system can be generated and printed out in hardcopy.



On selection of this option from the Reference File Menu, Pi will create a full set of Blank Questionnaires as follows:

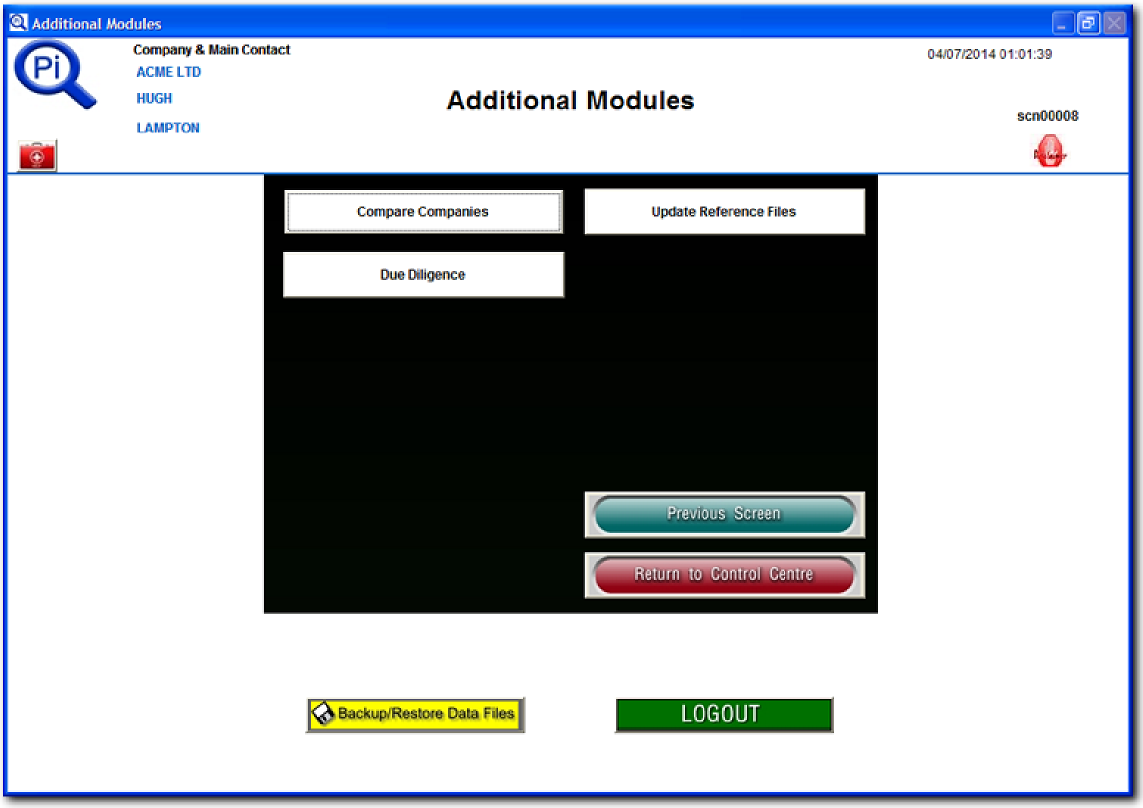
Information Capability Questionnaire
Business Process Questionnaire
Goals and Objectives Questionnaire
Performance Questionnaire
Applications and Software Questionnaire
Data Integration Questionnaire
Hardware Questionnaire
People Questionnaire

These questionnaires are saved in word processor format in the default “BlankQuestionnaires” directory on the local disk where the software is installed.

The questionnaires can be accessed via the “Locations of Reports on Disk” option of the Account Options Menu, from where they can be printed out.

Reference File Maintenance

2.94 Additional Modules



This sub-menu allows you to access any additional modules that have been purchased

For details on each option click the appropriate button below:-

Compare Companies - Accesses the Compare Multi-Companies Module
Due Diligence - Accesses the Due Diligence Questionnaire Module
Update Reference Files – Accesses the File Reference Module

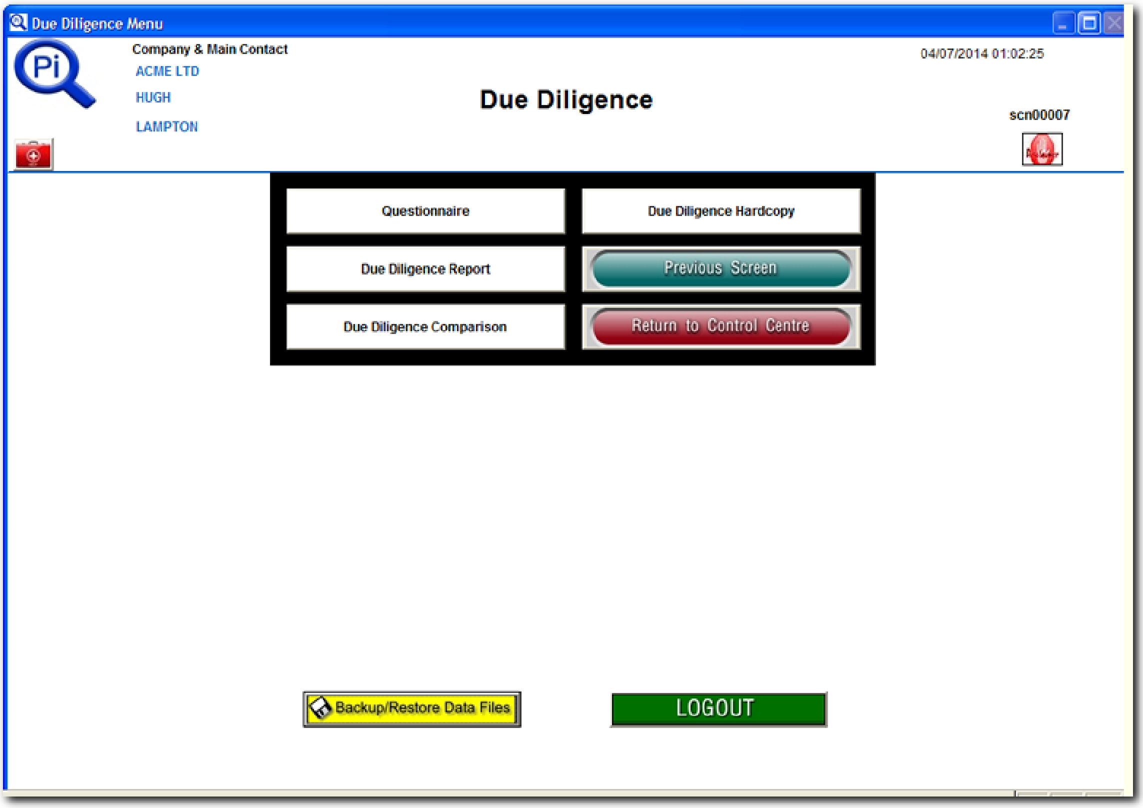
Previous Screen returns you to the Account Options Sub Menu

Account Options Menu   How Do I - Account Options Menu

Backup / Restore Data Files
This gives access to Data File Security options

Pressing the **LOGOUT** button quits from the application

2.95 Due Diligence



Here you can access the Due Diligence options:

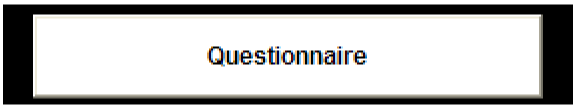
Due Diligence - Allows access to the Due Diligence Questionnaire
Due Diligence Report - Produces the Due Diligence Analysis report
Due Diligence Comparison - Accesses the Compare Companies (including Due Diligence) Selection Screen
Due Diligence Hardcopy- Allows a Blank Hardcopy Due Diligence Questionnaire to be printed (saved to disk)

Previous Screen returns you to the ADD-ONS menu

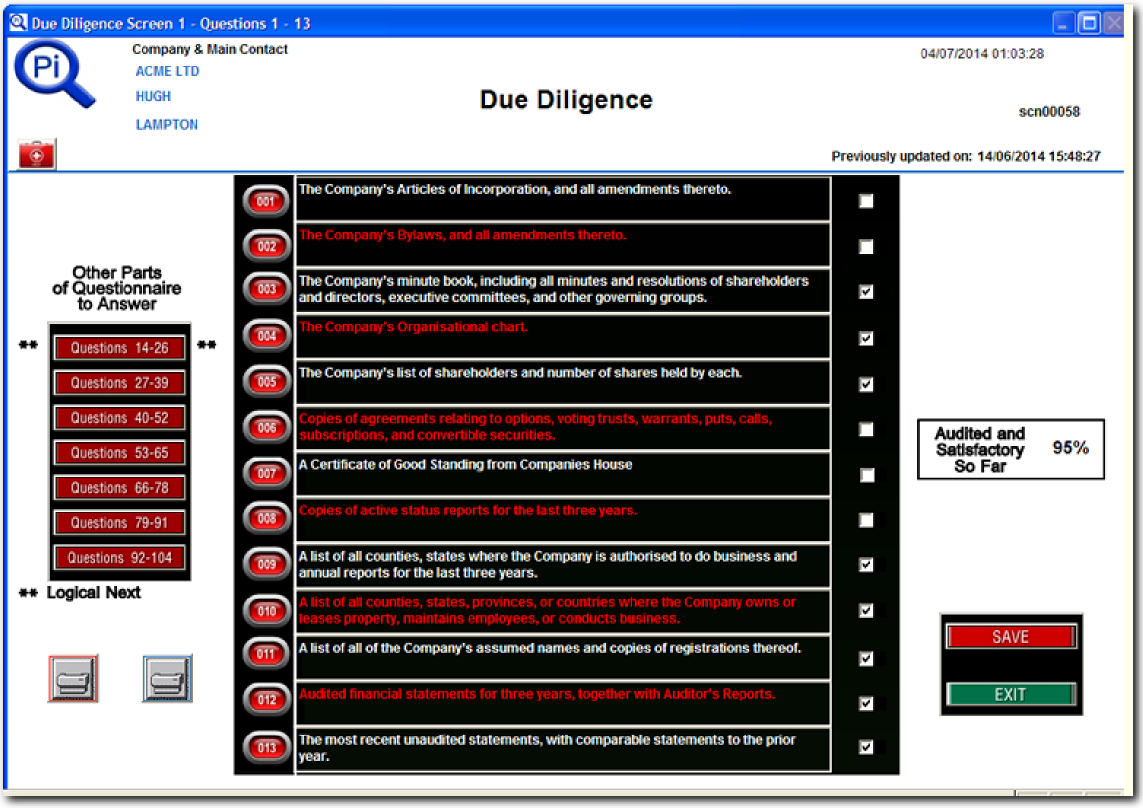
Backup / Restore Data Files
This gives access to Data File Security options

Pressing the **LOGOUT** button quits from the application

2.96 Due Diligence Questionnaire



Selection of this option allows you to enter the results from Due Diligence exercises.



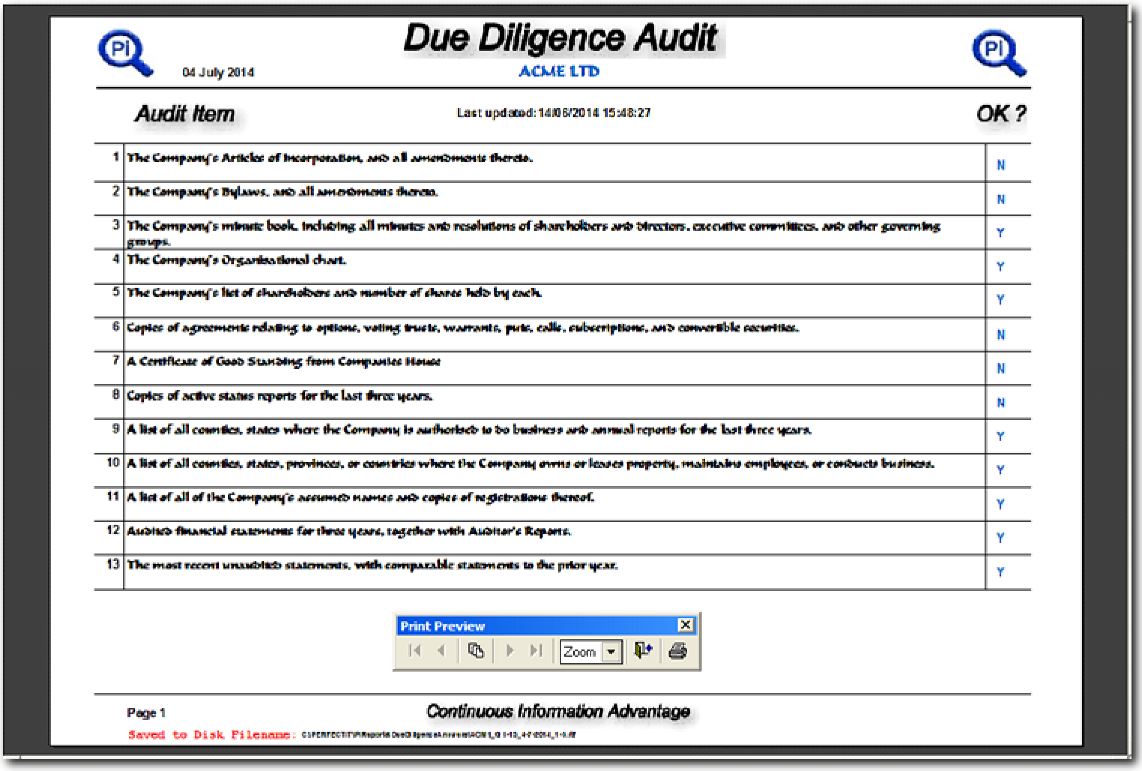
This is the first screen of the 8 available and presents you with the first 13 questions to be answered. The first 13 Due Diligence Audit Items are presented and besides each is a check box. For each you must indicate if the item has been audited and that the outcome of that audit is satisfactory, by clicking (placing tick) in the related check box. For those Due Diligence Audit Items that have not been audited or for which the outcome is not satisfactory the check box should be left blank.

Note: If an item is not relevant to the audit, a tick should also be placed in the check box.

Half way down the right hand side of the screen is a percentage indicator of the progress reached on the overall Due Diligence audit exercise.

Once you have completed the answers for this screen you should proceed through the questionnaire to answer all 104 questions. Navigation is achieved by clicking the navigation buttons of the left hand side of each screen which allow you to proceed logically through the questionnaire or to jump around within it.

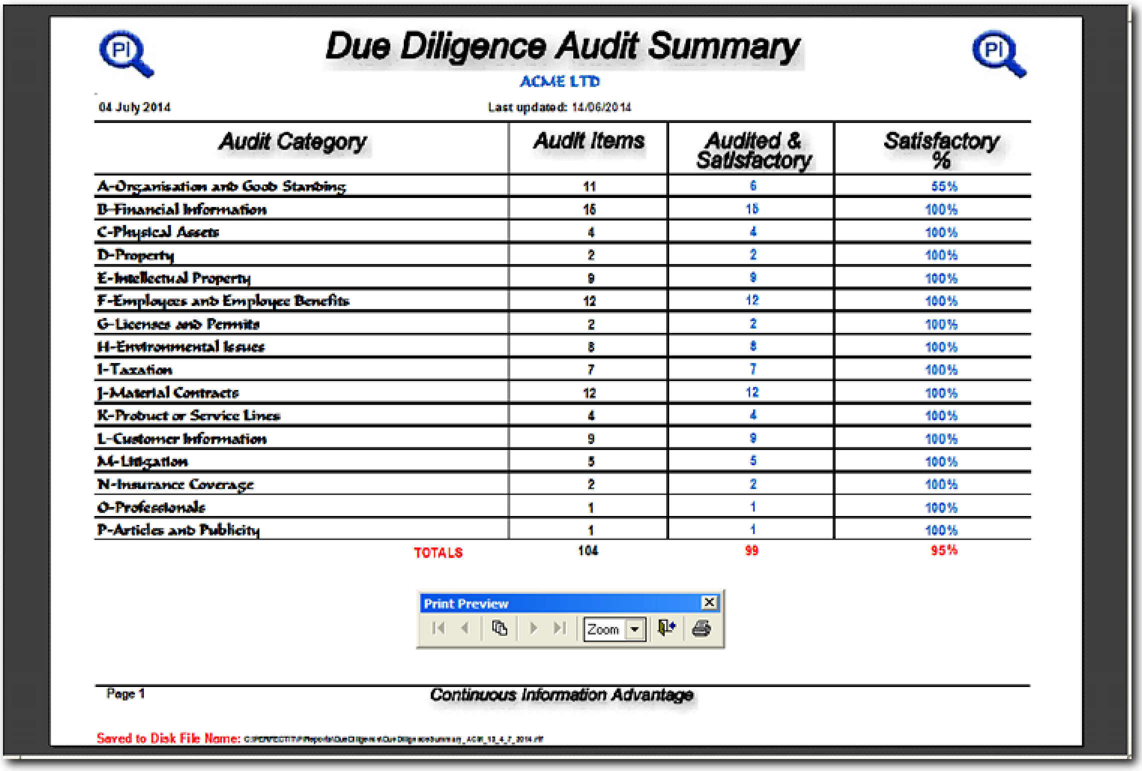
Below the navigation buttons there are two Print Icon buttons which will allow you to either review a report of the current screen's questions and answers or the full audit (all questions) onscreen and /or produce a hardcopy of them. An example is below:
Your reports are also SAVED to Disk in Word Processor Universal RTF Format and can be reviewed at anytime see Reports saved to disk



At anytime and on any screen you may save your answers or exit back to the Due Diligence sub menu by use of the **SAVE** and EXIT buttons located at the bottom right hand section of each screen.

2.97 Due Diligence Summary Report

On selection of this option from the Due Diligence Sub Menu the following Due Diligence Audit Summary report is produced and is also saved to disk for the currently selected company.



Due Diligence Audit Summary

ACME LTD

04 July 2014

Last updated: 14/06/2014

Audit Category	Audit Items	Audited & Satisfactory	Satisfactory %
A-Organisation and Good Standing	11	6	55%
B-Financial Information	15	15	100%
C-Physical Assets	4	4	100%
D-Property	2	2	100%
E-Intellectual Property	9	9	100%
F-Employees and Employee Benefits	12	12	100%
G-Licenses and Permits	2	2	100%
H-Environmental Issues	8	8	100%
I-Taxation	7	7	100%
J-Material Contracts	12	12	100%
K-Product or Service Lines	4	4	100%
L-Customer Information	9	9	100%
M-Litigation	5	5	100%
N-Insurance Coverage	2	2	100%
O-Professionals	1	1	100%
P-Articles and Publicity	1	1	100%
TOTALS	104	99	95%

Print Preview

Zoom

Page 1

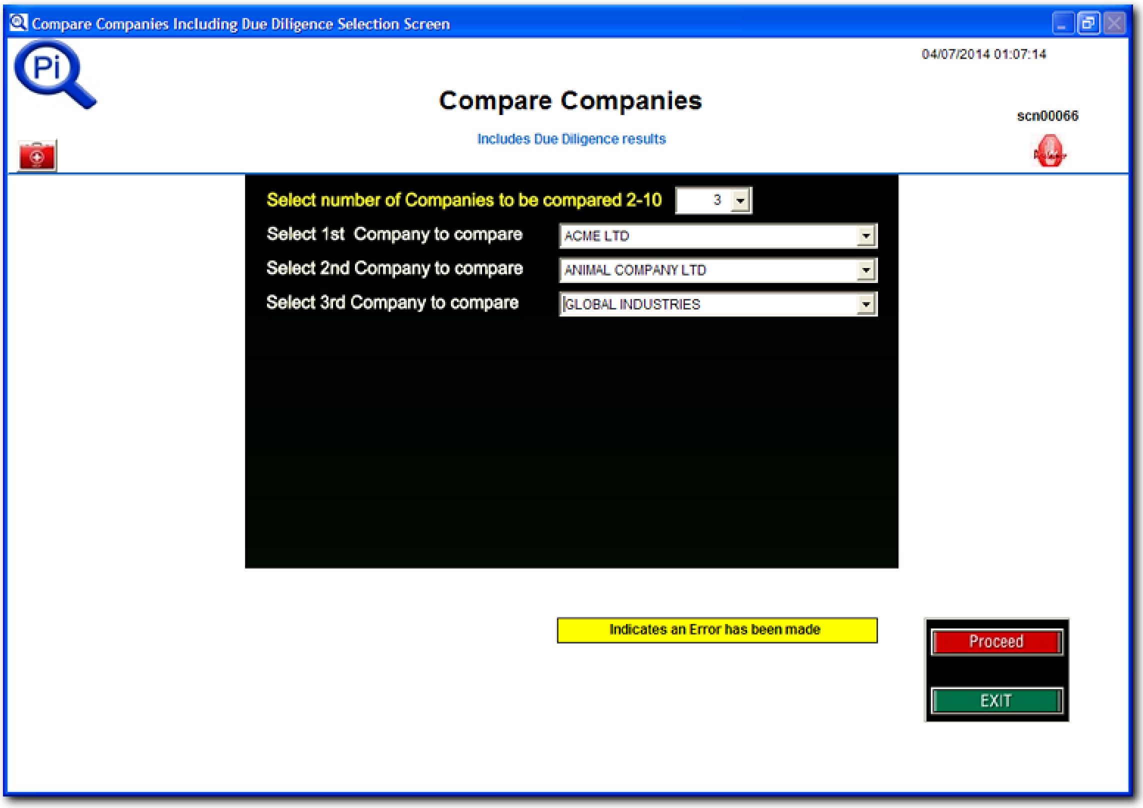
Continuous Information Advantage

Saved to Disk File Name:

Due Diligence

2.98 Compare Companies including Due Diligenc

Selection of this option from the Add-ons sub menu allows you to compare the relative Business Effectiveness across all Application Areas, the Due Diligence Scores and a weighted average of both measures for up to 10 Companies.

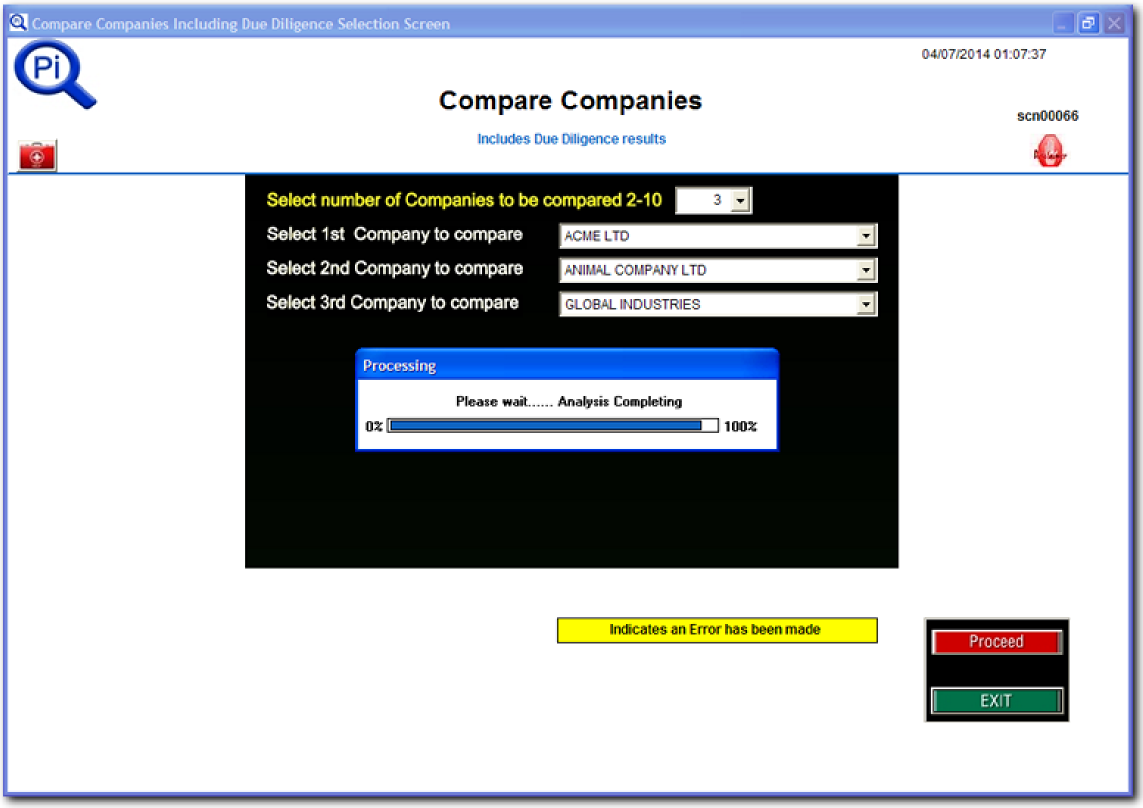


On this screen you must select the number of Companies to be compared by using the drop down selection list provided.

The system will display further drop down selection lists to select the companies to be compared.

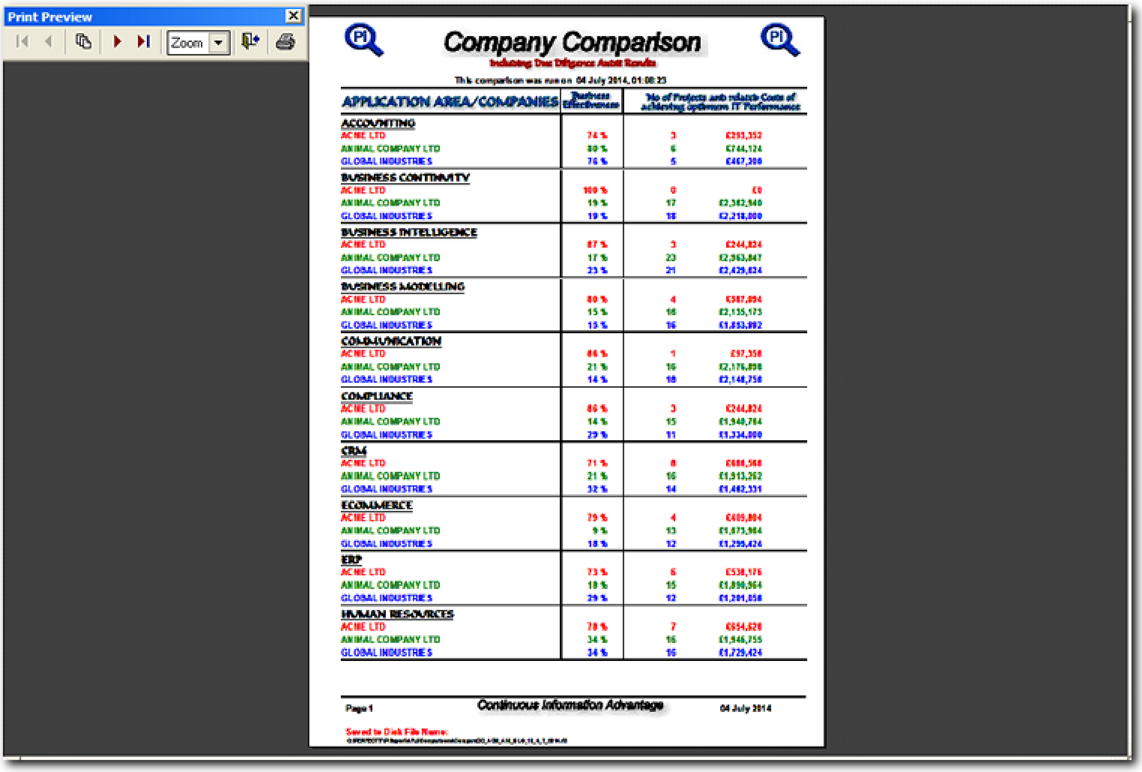
Clicking **EXIT** returns you to the Due Diligence Menu

When selection has been made you should click the **Proceed** key to start the analysis. A progress bar appears indicating the state of analysis reached.



When the analysis is complete the following report, including summary page, is produced on screen, where it can be viewed and/or printed. The report is also saved to disk in Word Processor format.

Detail



Print Preview

Company Comparison

Including Due Diligence Audit Results

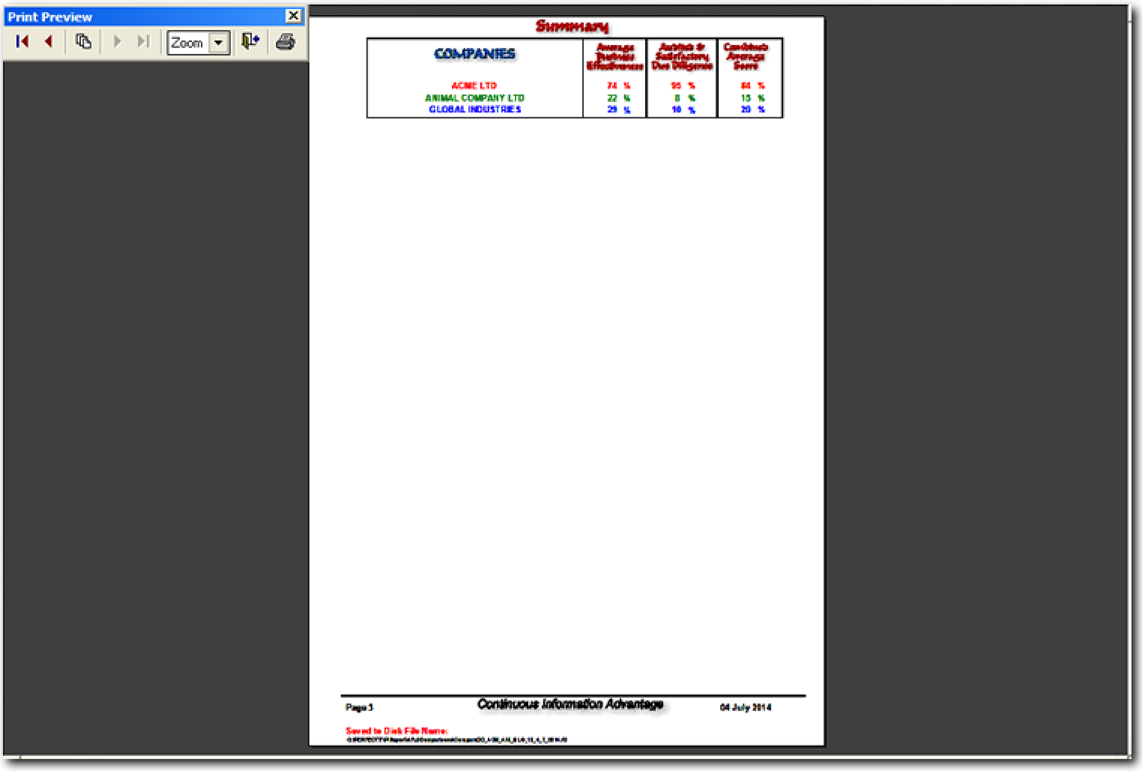
This comparison was run on 04 July 2014, 01:08:23

APPLICATION AREA/COMPANIES	Business Effectiveness	No of Projects and relate Costs of achieving optimum IT Performance	
ACCOUNTING			
ACME LTD	74 %	3	£293,352
ANIMAL COMPANY LTD	80 %	6	£744,124
GLOBAL INDUSTRIES	76 %	5	£467,200
BUSINESS CONTINUITY			
ACME LTD	100 %	0	£0
ANIMAL COMPANY LTD	19 %	17	£2,382,940
GLOBAL INDUSTRIES	19 %	18	£2,218,000
BUSINESS INTELLIGENCE			
ACME LTD	87 %	3	£244,824
ANIMAL COMPANY LTD	17 %	23	£2,963,847
GLOBAL INDUSTRIES	23 %	21	£2,429,824
BUSINESS MODELLING			
ACME LTD	80 %	4	£587,094
ANIMAL COMPANY LTD	15 %	18	£2,135,173
GLOBAL INDUSTRIES	15 %	16	£1,853,892
COMMUNICATION			
ACME LTD	86 %	1	£97,358
ANIMAL COMPANY LTD	21 %	16	£2,176,898
GLOBAL INDUSTRIES	14 %	18	£2,148,758
COMPLIANCE			
ACME LTD	86 %	3	£244,824
ANIMAL COMPANY LTD	14 %	15	£1,948,784
GLOBAL INDUSTRIES	29 %	11	£1,334,000
CRM			
ACME LTD	71 %	8	£686,568
ANIMAL COMPANY LTD	21 %	16	£1,913,262
GLOBAL INDUSTRIES	32 %	14	£1,482,331
ECOMMERCE			
ACME LTD	79 %	4	£409,804
ANIMAL COMPANY LTD	9 %	13	£1,873,984
GLOBAL INDUSTRIES	18 %	12	£1,295,424
ERP			
ACME LTD	73 %	6	£538,176
ANIMAL COMPANY LTD	18 %	15	£1,890,964
GLOBAL INDUSTRIES	29 %	12	£1,201,858
HUMAN RESOURCES			
ACME LTD	78 %	7	£654,628
ANIMAL COMPANY LTD	34 %	16	£1,946,755
GLOBAL INDUSTRIES	34 %	16	£1,729,424

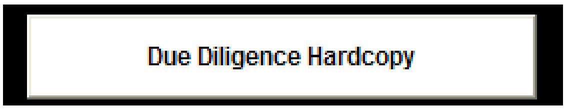
Page 1 Continuous Information Advantage 04 July 2014

Saved to Disk File Name:

Summary



2.99 Blank Due Diligence Questionnaire



On selection of this option from the Due Diligence Sub Menu, Pi will create a Blank Due Diligence Questionnaire. This can be used for interview/completion purposes.

This questionnaire is saved in word processor format in the default “BlankQuestionnaires” directory on the local disk where the software is installed.

The questionnaire can be accessed via the Reports saved to disk option of the Account Options Menu, from where it can be printed.

Due Diligence

2.100 How Do I - Control Centre

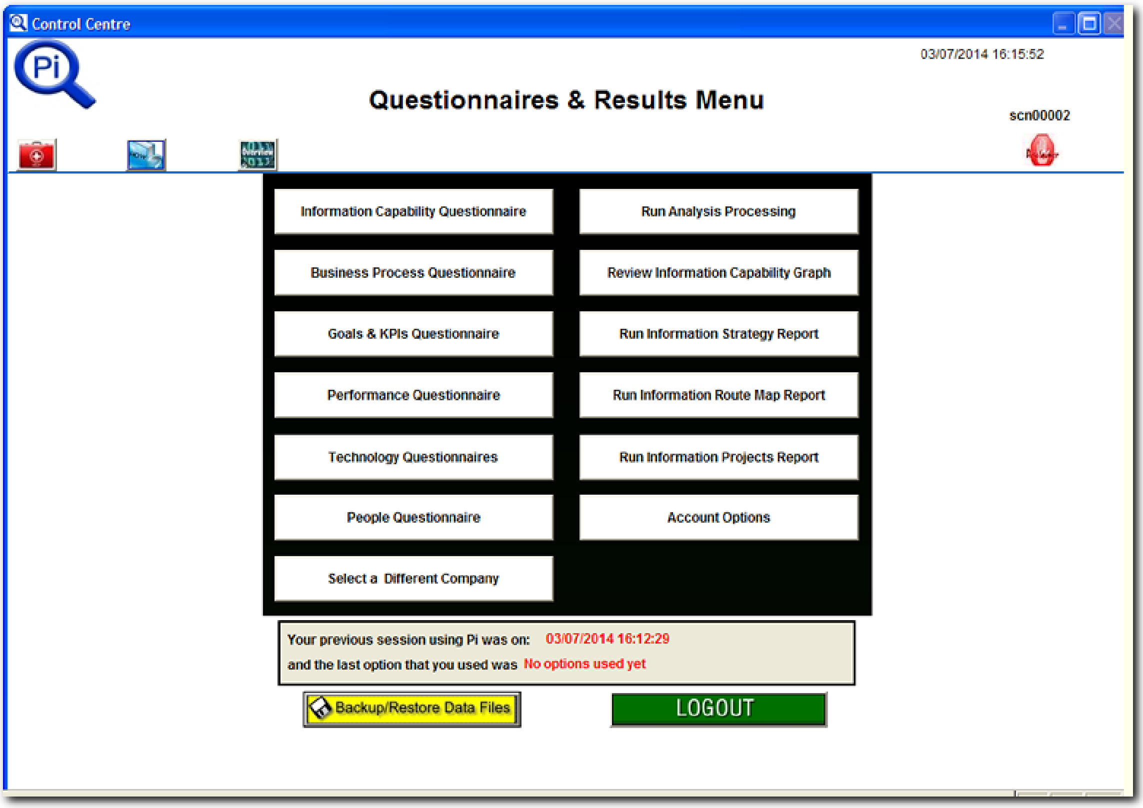
Overview

In simple terms Pi is an Application that asks you simple questions about the various areas of your company and based on your answers recommends how you can improve your overall business performance through better information.

Important Note
It is essential that you complete ALL of the questionnaires within the system before running any of the output options

These are:
IC YES NO QUESTIONS
BUSINESS PROCESS QUESTIONS
GOALS & OBJECTIVES QUESTIONS
PERFORMANCE QUESTIONS
TECHNOLOGY QUESTIONS (Applications/Software, Data Integration & Hardware)
PEOPLE QUESTIONS

Once you have signed in to the system you will arrive at the Control Centre



The Control Centre is the "Main Menu" of the system. Clicking on the buttons displayed will take you to the appropriate input screen, a further sub-menu or will generate output.

For details on each option click the appropriate link below:-

How Do I - Complete the IC Questionnaire
How Do I - Business Process Menu
How Do I - Goals & Objectives Menu
How Do I - Performance Menu
How Do I - Technology Menu
How Do I - People Questionnaire
Analysis This will run analysis for the currently selected company, this will re-select all of the Master questionnaires
Select a Company This will allow you to select a company to work on (Multi-Company version only)
How Do I - IC Results / Graph This will produce Information Capability Graph for the currently selected company
How Do I - Strategy Results This will run the Information Strategy Report for the currently selected company (To screen and disk or just to disk)
How Do I - Route Map Results This will run the Route Map Report for the currently selected company (To screen and disk or just to disk)
How Do I - Projects Results This will run the Projects Report for the currently selected company (To screen and disk or just to disk)
How Do I - Account Options Menu This gives access to Account Details

LICENCE CODE If this button is visible you need to enter your licence code - Until this is done, the options available to you will be limited.(Licence code must be entered within a set number of days or software will cease to function)

Backup / Restore data filesThis will allow you to backup or restore all the data files of the application

Pressing the **LOGOUT** button quits from the application

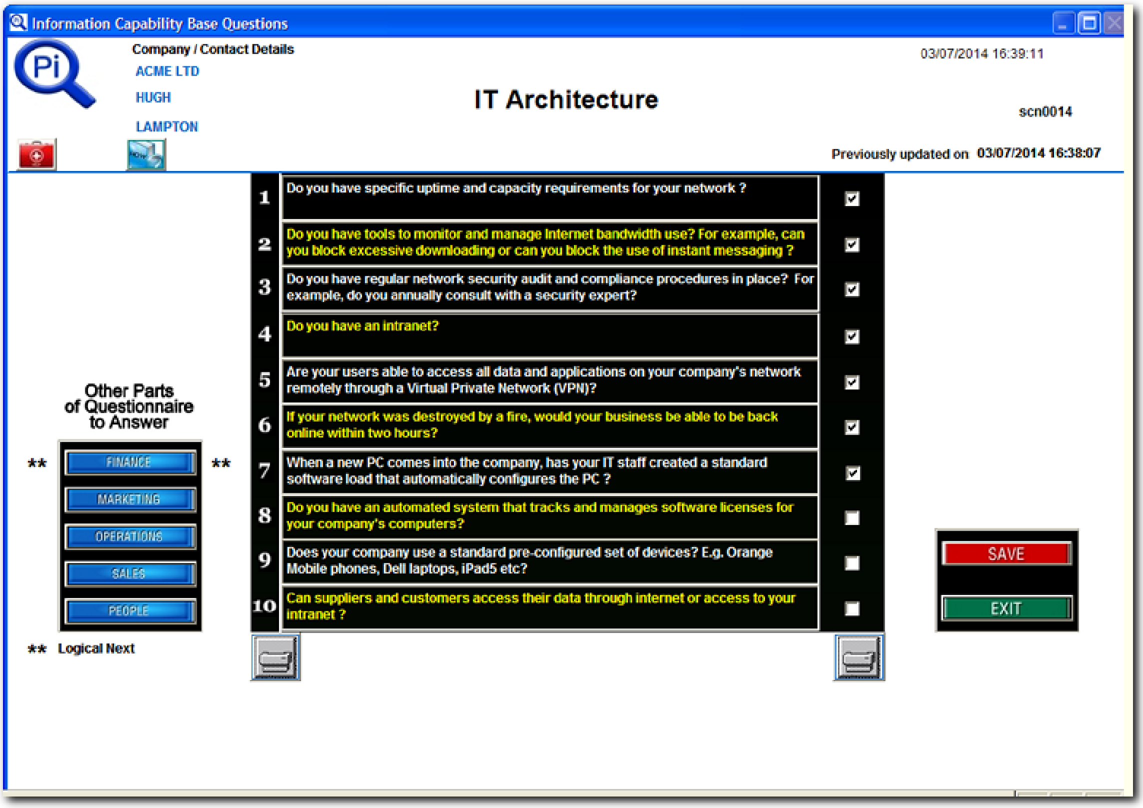
2.101 How Do I - Complete the IC Questionnaire

The Information Capability (IC) Questionnaire is a series of questions designed to gauge your company's basic abilities in terms of collecting and using information.

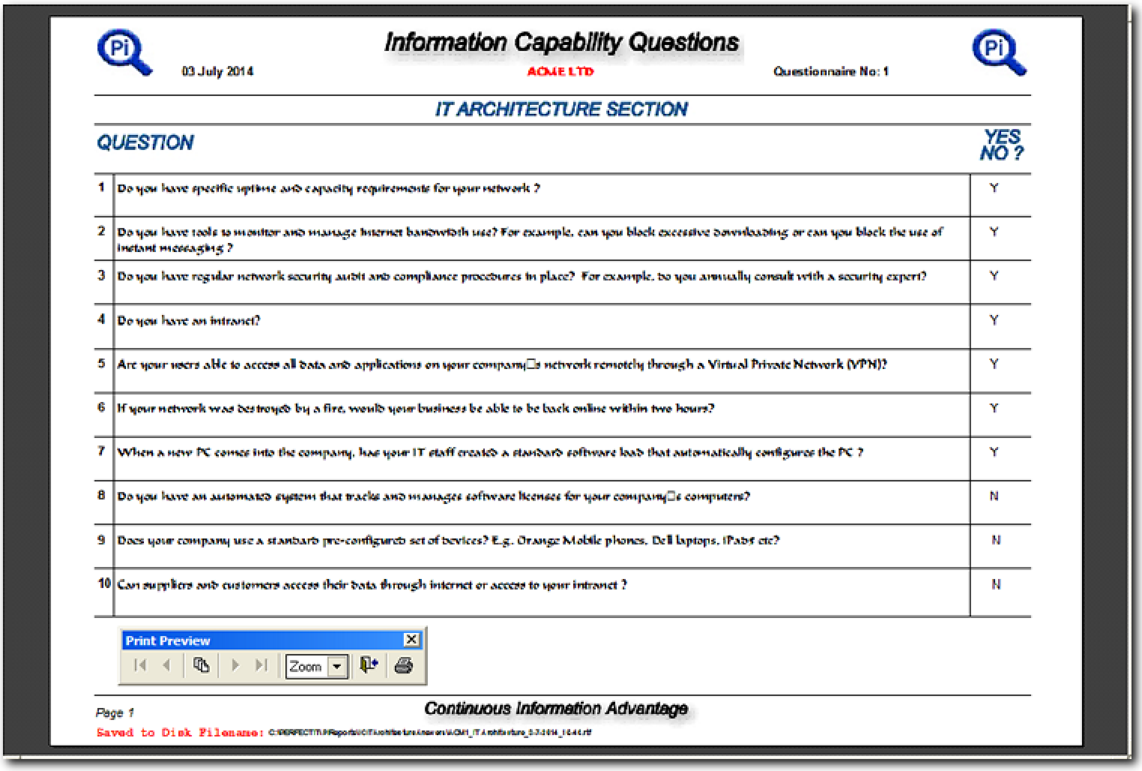
The questionnaire is split into 6 sections which deal with:
IT Architecture
Finance
Marketing
Operations
Sales
People

Each section consists of 10 questions.

Guide to the screens



The first screen you will see is the IT Architecture screen. Here you are presented with 10 questions. On the right-hand side of each question is a tick box. To answer positively to a question simply place the cursor in the relative tick box and click the left mouse button. *(to remove a tick do the same)* If you wish to review and/or print your answers you should click the printer button at the bottom of the screen on the left-hand side, labelled **"Print these Answers**". If you wish to review and/or print the complete questionnaire (all sections) click the printer button at the bottom on the right-hand side, labelled **"Print All Sections**". In both cases the report will be sent to the screen for review, where you can print a hardcopy, by use of the Print preview bar displayed.



Information Capability Questions

03 July 2014 ACME LTD Questionnaire No: 1

IT ARCHITECTURE SECTION

	QUESTION	YES NO ?
1	Do you have specific uptime and capacity requirements for your network ?	Y
2	Do you have tools to monitor and manage Internet bandwidth use? For example, can you block excessive downloading or can you block the use of instant messaging ?	Y
3	Do you have regular network security audit and compliance procedures in place? For example, do you annually consult with a security expert?	Y
4	Do you have an intranet?	Y
5	Are your users able to access all data and applications on your company□s network remotely through a Virtual Private Network (VPN)?	Y
6	If your network was destroyed by a fire, would your business be able to be back online within two hours?	Y
7	When a new PC comes into the company, has your IT staff created a standard software load that automatically configures the PC ?	Y
8	Do you have an automated system that tracks and manages software licenses for your company□s computers?	N
9	Does your company use a standard pre-configured set of devices? E.g. Orange Mobile phones, Dell laptops, iPads etc?	N
10	Can suppliers and customers access their data through internet or access to your intranet ?	N

Page 1 Continuous Information Advantage

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When you have finished entering your answers for this section, you may SAVE them by either clicking on the **SAVE** button at the bottom of the screen on the right-hand side, or by clicking one of the 5 navigational buttons in the block on the left hand side, labelled "Other Parts of Questionnaire to Answer". Clicking one of these navigational buttons will take you to the requested section of the questionnaire.

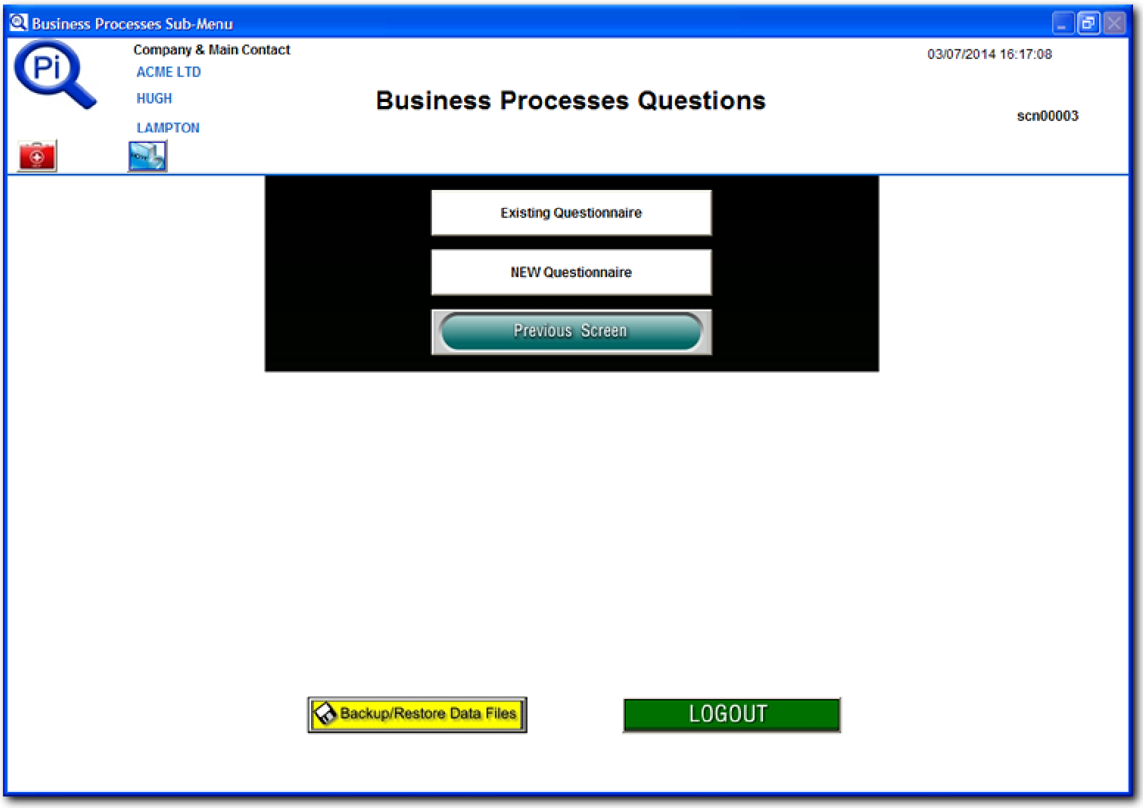
All the sections of the questionnaire work in exactly the same manner. Although guidance is given in each section as to the next logical section to complete, you can jump around the sections in any order that you like.

When you have completed work on the IC questionnaire remember to click the **SAVE** button to save your answers to the current section before exiting. When you have done this click the **EXIT** button and you will be returned to the Control Centre.

How Do I - Control Centre

2.102 How Do I - Business Process Menu

The Business Process Menu is used to either select an existing Business Process questionnaire or to create a new one.
For reporting/analysis purposes the "master" Business Process questionnaire is always used, but you may create additional questionnaires to run "what-if" scenarios in terms of the "Information Capability" graph function.



This menu presents you with 3 choices : *click the buttons below to see their functions.*

Existing Questionnaire New Questionnaire Previous Screen

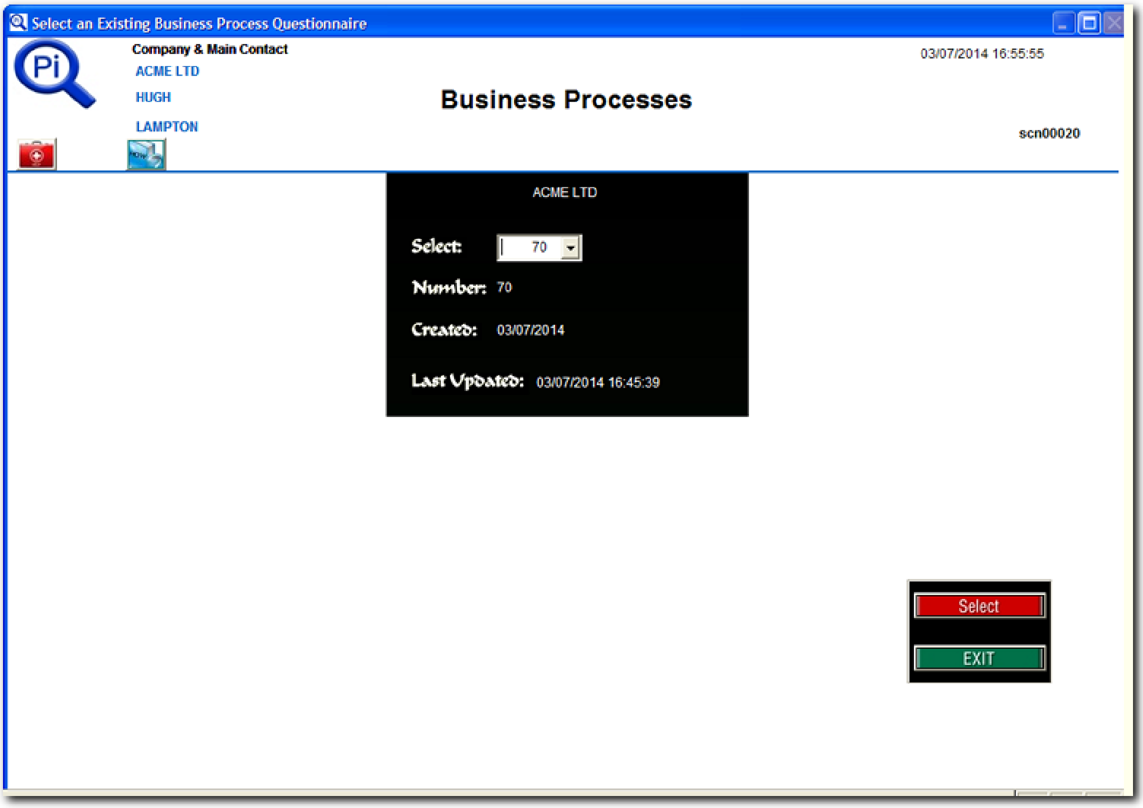
Backup / Restore data filesThis will allow you to backup or restore all the data files of the application

Pressing the **LOGOUT** button quits from the application

2.103 How Do I - Existing BP Questionnaire

Here you can select one of the Business Process questionnaires that you have created. Selection is made by using the drop down selection box. This is scrollable. There is one "master" Business Process questionnaire, this represents the actual position of the company in terms of business processes and is always used for analysis and reports. However, for the purposes of running "what-if" scenarios in respect of the Information Capability graph function, you may have several versions of this questionnaire. If you wish to run a "what-if" Information Capability graph using a specific Business Process questionnaire, you should select it using this screen, update it (if necessary) when you have reached the update screen (see below) and save it using the relevant SAVE button. This version will be used for all Information Capability Graphs, until you either run the Control Centre "ANALYSIS" function or if you run any of the reporting functions of the system, in which case The "master" Business Process questionnaire will be re-selected automatically.

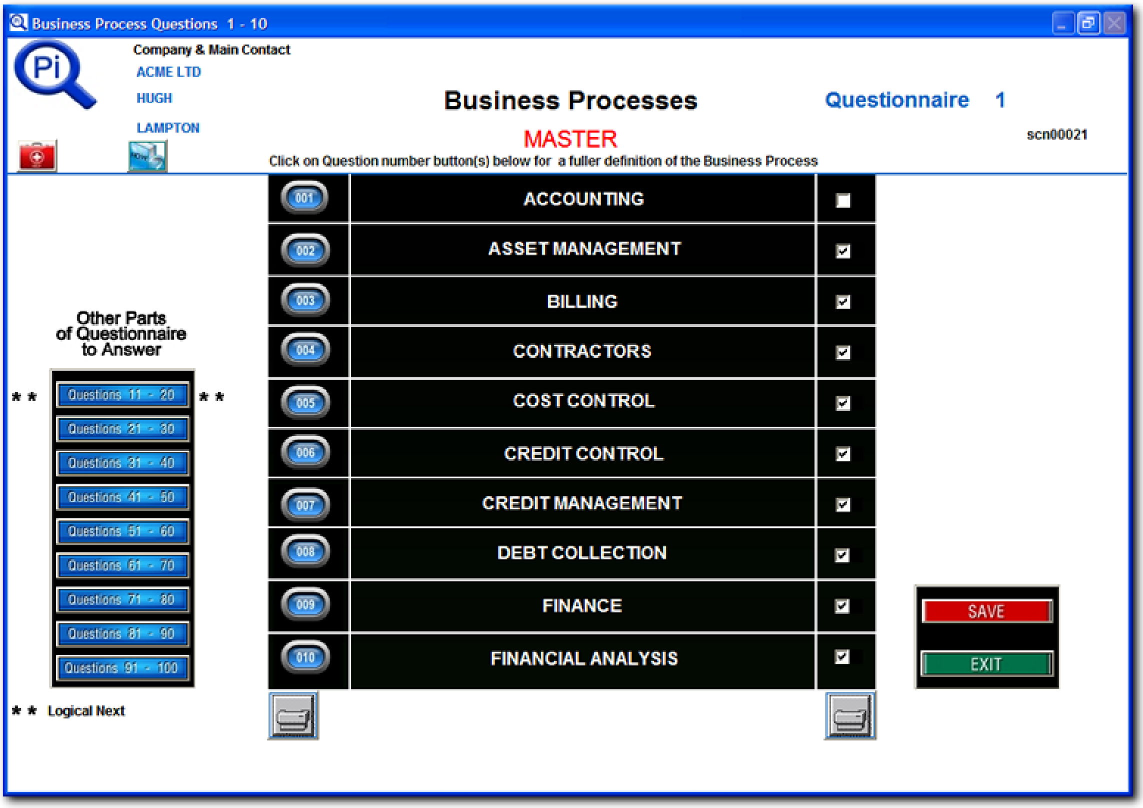
Using the Existing Business Process Questionnaire



If you select the "master" version of this questionnaire it will be indicated by the word master appearing on this screen. On selection of a questionnaire the date the questionnaire was created and the last date/time it was updated will also appear.

Once you have selected the Business Process questionnaire that you wish to work on, you should click the **Select** button

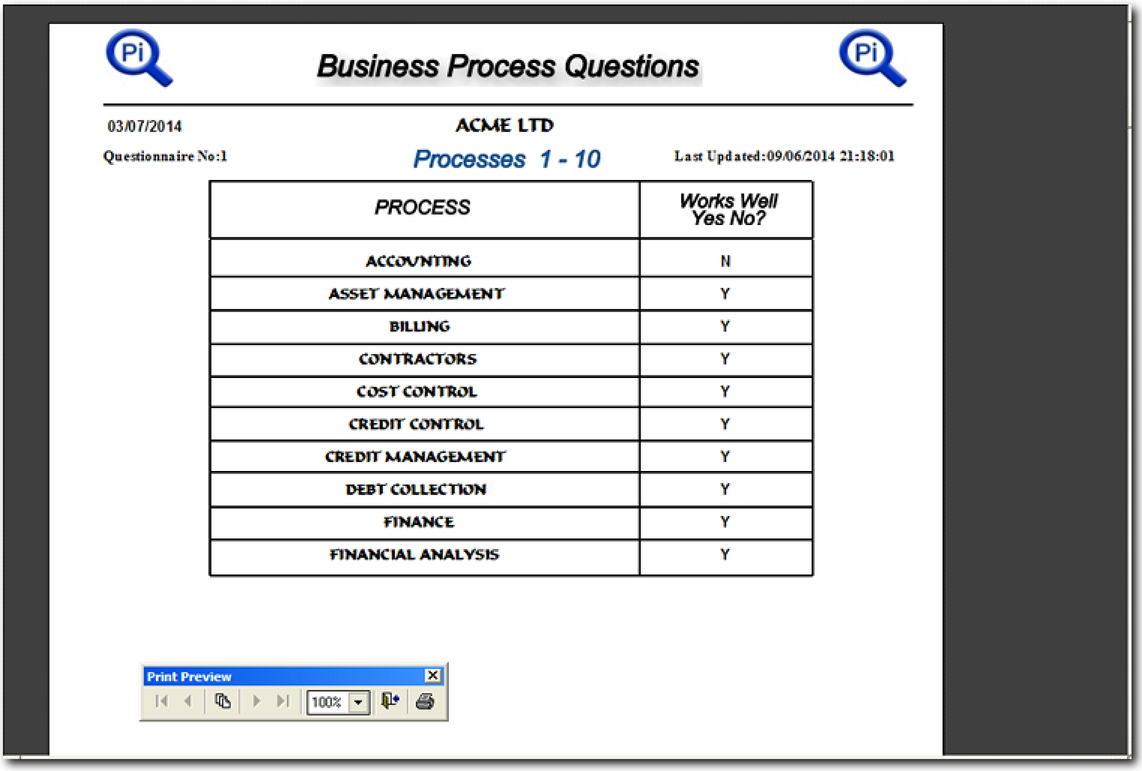
The following screen will appear:



At the top of the screen the questionnaire number will appear. If you are editing the "master" Business Process questionnaire this will also be indicated.

There are a total of 100 numbered questions to answer, split into 10 sections. Besides each number is the Business Process name, to the right of this is a tick box. You must indicate whether each process exists and works well by clicking the left mouse button whilst the cursor is over the relevant tick box(es). If a process(es) does not exist or does not work well, the relevant tick box(es) should be left blank. If you wish to remove a tick from a box simply place the cursor over the relevant tick box and click the left mouse button.

If you wish to review and/or print your answers you should click the printer button at the bottom of the screen on the left-hand side, labelled **"Print these Answers"**. If you wish to review and/or print the complete questionnaire (all sections) click the printer button at the bottom on the right-hand side, labelled **"Print All Sections"**. In both cases the report will be sent to the screen for review, where you can print a hardcopy, by use of the Print preview bar displayed.



Business Process Questions

03/07/2014 ACME LTD

Questionnaire No:1 Processes 1 - 10 Last Updated:09/06/2014 21:18:01

PROCESS	Works Well Yes No?
ACCOUNTING	N
ASSET MANAGEMENT	Y
BILLING	Y
CONTRACTORS	Y
COST CONTROL	Y
CREDIT CONTROL	Y
CREDIT MANAGEMENT	Y
DEBT COLLECTION	Y
FINANCE	Y
FINANCIAL ANALYSIS	Y

When you have finished entering your answers for this section, you may SAVE them by either clicking on the **SAVE** button at the bottom of the screen on the right-hand side, or by clicking one of the 10 navigational buttons in the block on the left hand side, labelled "Other Parts of Questionnaire to Answer". Clicking one of these navigational buttons will take you to the requested section of the questionnaire.

All the sections of the questionnaire work in exactly the same manner. Although guidance is given in each section as to the next logical section to complete, you can jump around the sections in any order that you like.

When you have completed work on the Business Process questionnaire remember to click the **SAVE** button to save your answers to the current section before exiting. When you have done this click the **EXIT** button and you will be returned to the Business Processes menu.

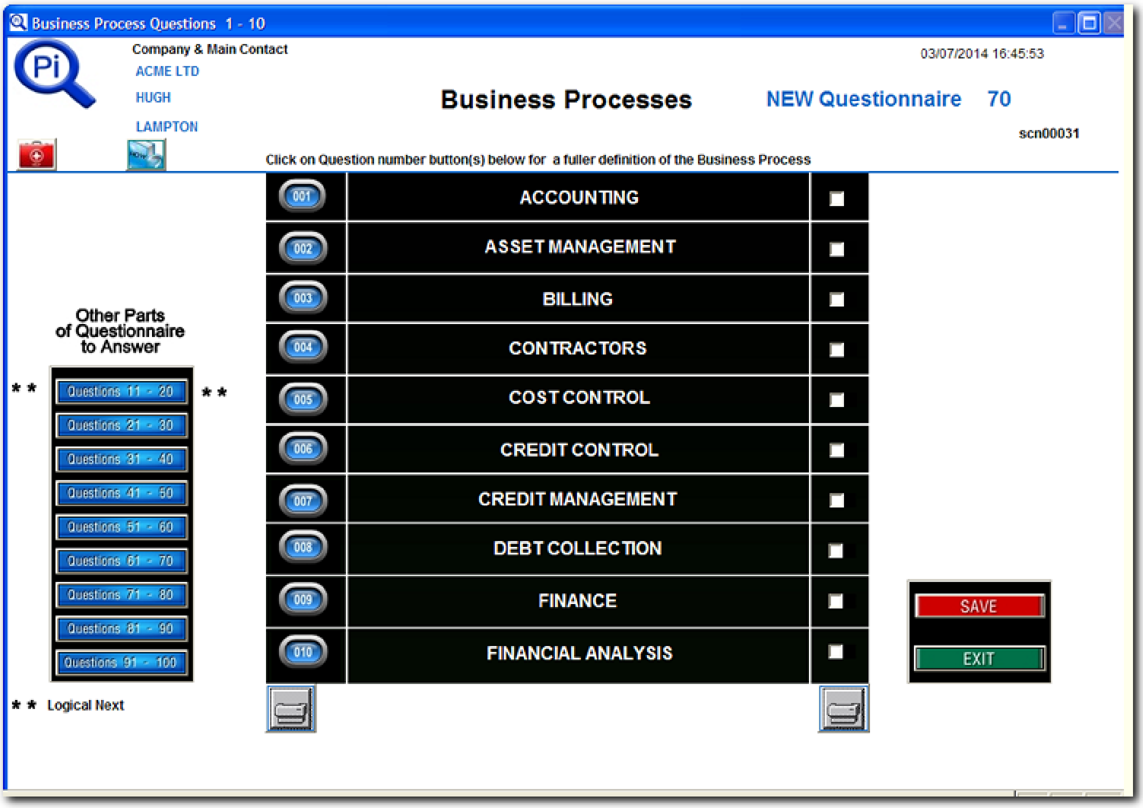
Return to the Business Processes Menu

2.104 How Do I - NEW BP Questionnaire

Having selected this option you will now have a NEW Blank Business Process questionnaire to complete.

*NOTE There is one "master" Business Process questionnaire; this represents the actual position of the company in terms of business processes and is always used for analysis and reports. However, for the purposes of running "what-if" scenarios in respect of the Information Capability graph function, you may have several versions of this questionnaire.

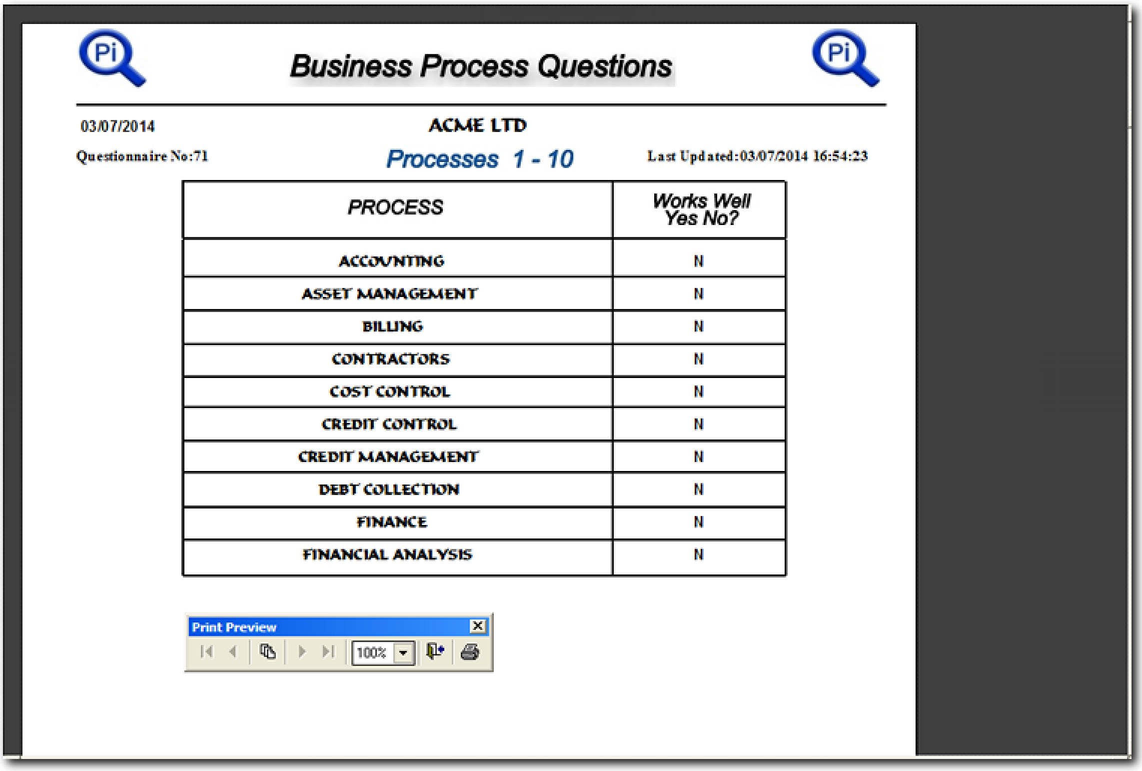
Using the NEW Business Process Questionnaire



At the top of the screen the questionnaire number will appear.

There are a total of 100 hundred numbered questions to answer, split into 10 sections. Besides each number is the Business Process name, to the right of this is a tick box. You must indicate whether each process exists and works well by clicking the left mouse button whilst the cursor is over the relevant tick box(es). If a process(es) does not exist or does not work well, the relevant tick box(es) should be left blank. If you wish to remove a tick from a box simply place the cursor over the relevant tick box and click the left mouse button.

If you wish to review and/or print your answers you should click the printer button at the bottom of the screen on the left-hand side, labelled **"Print these Answers"**. If you wish to review and/or print the complete questionnaire (all sections) click the printer button at the bottom on the right-hand side, labelled **"Print All Sections"**. In both cases the report will be sent to the screen for review, where you can print a hardcopy, by use of the Print preview bar displayed.


Business Process Questions

03/07/2014 ACME LTD

Questionnaire No:71 Processes 1 - 10 Last Updated:03/07/2014 16:54:23

PROCESS	Works Well Yes No?
ACCOUNTING	N
ASSET MANAGEMENT	N
BILLING	N
CONTRACTORS	N
COST CONTROL	N
CREDIT CONTROL	N
CREDIT MANAGEMENT	N
DEBT COLLECTION	N
FINANCE	N
FINANCIAL ANALYSIS	N

When you have finished entering your answers for this section, you may SAVE them by either clicking on the **SAVE** button at the bottom of the screen on the right-hand side, or by clicking one of the 10 navigational buttons in the block on the left hand side, labelled "Other Parts of Questionnaire to Answer". Clicking one of these navigational buttons will take you to the requested section of the questionnaire.

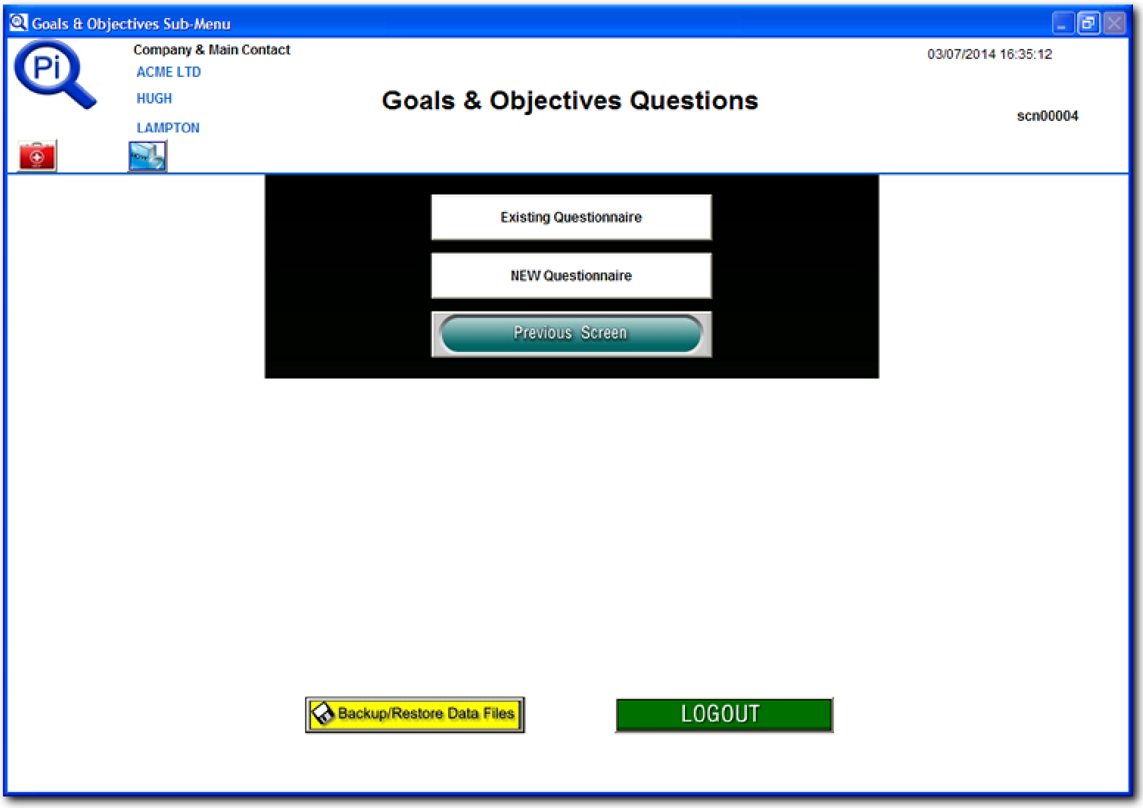
All the sections of the questionnaire work in exactly the same manner. Although guidance is given in each section as to the next logical section to complete, you can jump around the sections in any order that you like.

When you have completed work on the Business Process questionnaire remember to click the **SAVE** button to save your answers to the current section before exiting. When you have done this click the **EXIT** button and you will be returned to the Business Processes menu.

Return to the Business Processes Menu

2.105 How Do I - Goals Menu

The Goals & Objectives Menu is used to either select an existing Goals & Objectives questionnaire or to create a new one.
For reporting/analysis purposes the "master" Goals & Objectives questionnaire is always used, but you may create additional questionnaires to run "what-if" scenarios in terms of the "Information Capability" graph function.



This menu presents you with 3 choices : *click the buttons below to see their functions.*

Existing Questionnaire New Questionnaire Previous Screen

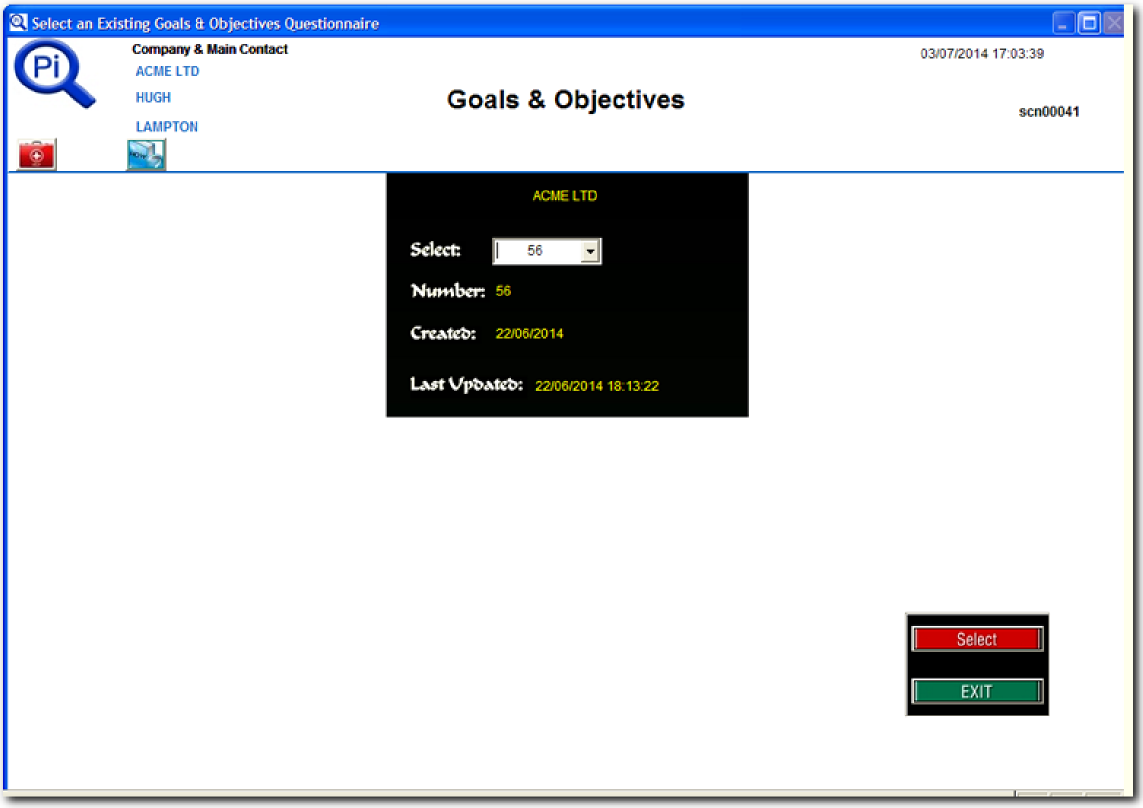
Backup / Restore data filesThis will allow you to backup or restore all the data files of the application

Pressing the **LOGOUT** button quits from the application

2.106 How Do I - Existing Goals Questionnaire

Here you can select one of the Goals & Objectives questionnaires that you have created. Selection is made by using the drop down selection box. This is scrollable. There is one "master" Goals & Objectives questionnaire, this represents the actual position of the company in terms of Goals & Objectives and is always used for analysis and reports. However, for the purposes of running "what-if" scenarios in respect of the Information Capability graph function, you may have several versions of this questionnaire. If you wish to run a "what-if" Information Capability graph using a specific Goals & Objectives questionnaire, you should select it using this screen, update it (if necessary) when you have reached the update screen (see below) and save it using the relevant SAVE button. This version will be used for all Information Capability Graphs, until you either run the Control Centre "ANALYSIS" function or if you run any of the reporting functions of the system, in which case The "master" Goals & Objectives questionnaire will be re-selected automatically.

Using the Existing Goals & Objectives Questionnaire



If you select the "master" version of this questionnaire it will be indicated by the word master appearing on this screen. On selection of a questionnaire the date the questionnaire was created and the last date/time it was updated will also appear.

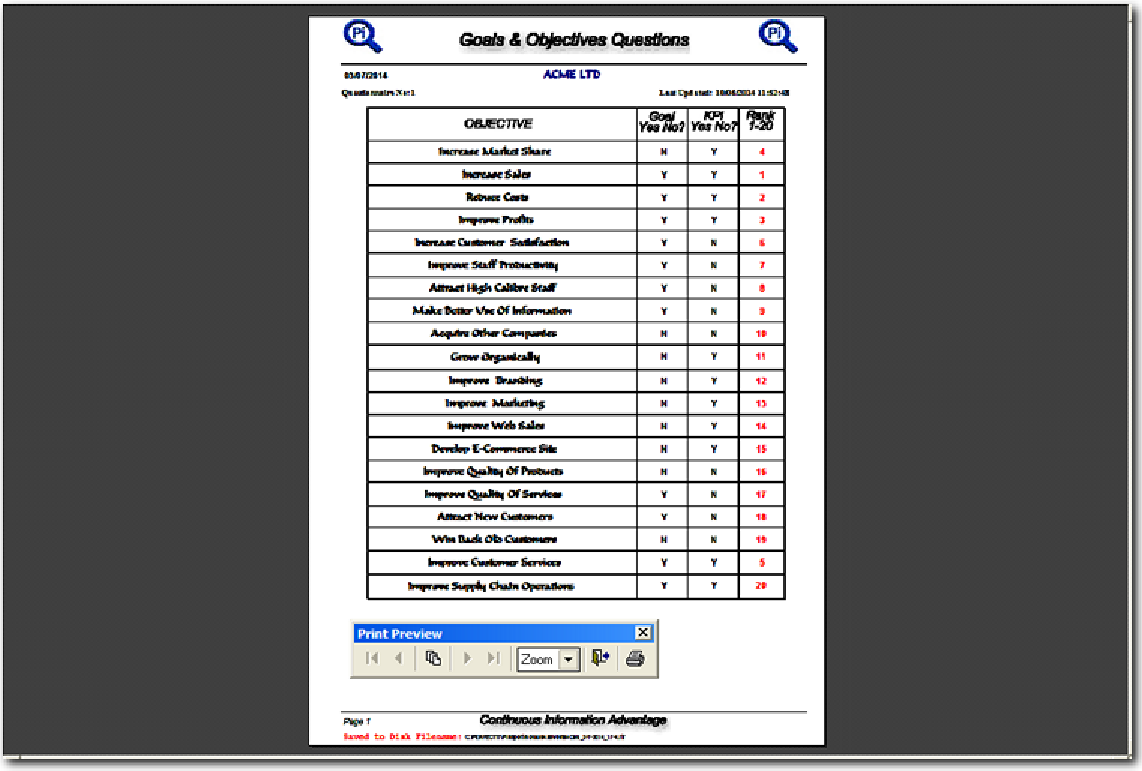
Once you have selected the Goals & Objectives questionnaire that you wish to work on, you should click the **Select** button

The following screen will appear:

At the top of the screen the questionnaire number will appear. If you are editing the "master" Goals & Objectives questionnaire this will also be indicated.

There are a total of 20 numbered questions to answer, split into 2 sections. Besides each number is the Objective name, to the right of this there are two tick boxes and a scrollable selection box. You must indicate whether each objective is a Business Goal and/or a KPI (Key Performance Indicator) and the Ranking (1-20) in terms of importance to the Business. To indicate a positive response for the tick boxes click the left mouse button whilst the cursor is over the relevant tick box(es). For the scrollable selection box simply scroll the box to select the appropriate ranking. If you wish to remove a tick from a box simply place the cursor over the relevant tick box and click the left mouse button.

If you wish to review and/or print your answers you should click the printer button at the bottom of the screen on the left-hand side, labelled **"Print these Answers**". The report will be sent to the screen for review, where you can print a hardcopy, by use of the Print preview bar displayed.


Goals & Objectives Questions

ACME LTD

OBJECTIVE	Goal Yes No?	KPI Yes No?	Rank 1-20
Increase Market Share	N	Y	4
Increase Sales	Y	Y	1
Reduce Costs	Y	Y	2
Improve Profits	Y	Y	3
Increase Customer Satisfaction	Y	N	6
Improve Staff Productivity	Y	N	7
Attract High Calibre Staff	Y	N	8
Make Better Use Of Information	Y	N	9
Acquire Other Companies	N	N	10
Grow Organically	N	Y	11
Improve Branding	N	Y	12
Improve Marketing	N	Y	13
Improve Web Sales	N	Y	14
Develop E-Commerce Site	N	Y	15
Improve Quality Of Products	N	N	16
Improve Quality Of Services	Y	N	17
Attract New Customers	Y	N	18
Win Back Old Customers	N	N	19
Improve Customer Services	Y	Y	5
Improve Supply Chain Operations	Y	Y	20

When you have finished entering your answers for this section, you may SAVE them by either clicking on the **SAVE** button at the bottom of the screen on the right-hand side, or by clicking the navigational button on the left hand side, labelled "Other Parts of Questionnaire to Answer". Clicking the navigational button will take you to the requested section of the questionnaire. All the sections of the questionnaire work in exactly the same manner.

When you have completed work on the Goals & Objectives questionnaire remember to click the **SAVE** button to save your answers to the current section before exiting. When you have done this click the **EXIT** button and you will be returned to the Goals & Objectives menu.

Return to the Goals and Objectives Menu

[****]

2.107 How Do I - NEW Goals Questionnaire

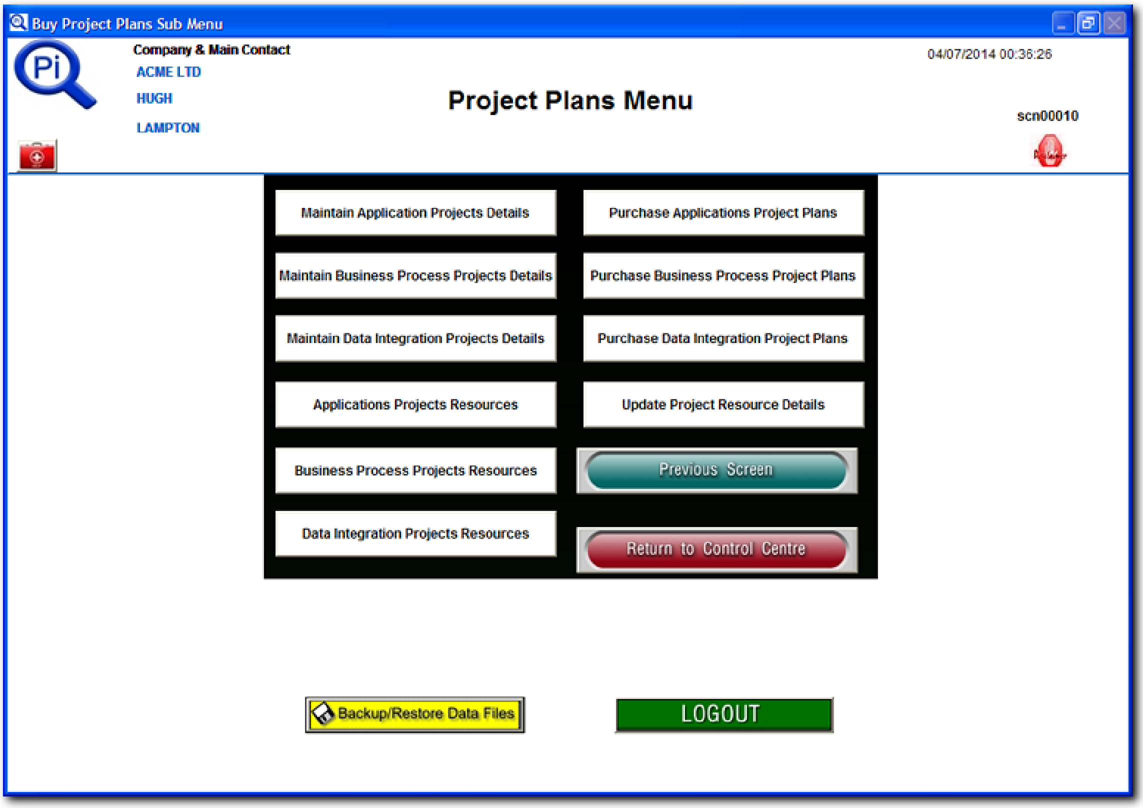
*NOTE There is one "master" Goals & Objectives questionnaire; this represents the actual position of the company in terms of Goals & Objectives and is always used for analysis and reports. However, for the purposes of running "what-if" scenarios in respect of the Information Capability graph function, you may have several versions of this questionnaire.

Using the NEW Goals & Objectives Questionnaire

At the top of the screen the questionnaire number will appear.

There are a total of 20 numbered questions to answer, split into 2 sections. Besides each number is the Objective name, to the right of this there are two tick boxes and a scrollable selection box. You must indicate whether each objective is a Business Goal and/or a KPI (Key Performance Indicator) and the Ranking (1-20) in terms of importance to the Business. To indicate a positive response for the tick boxes click the left mouse button whilst the cursor is over the relevant tick box(es). For the scrollable selection box simply scroll the box to select the appropriate ranking. If you wish to remove a tick from a box simply place the cursor over the relevant tick box and click the left mouse button.

If you wish to review and/or print your answers you should click the printer button at the bottom of the screen on the left-hand side, labelled **"Print these Answers**". The report will be sent to the screen for review, where you can print a hardcopy, by use of the Print preview bar displayed.



When you have finished entering your answers for this section, you may SAVE them by either clicking on the **SAVE** button at the bottom of the screen on the right-hand side, or by clicking the navigational button on the left hand side, labelled "Other Parts of Questionnaire to Answer". Clicking the navigational button will take you to the requested section of the questionnaire.

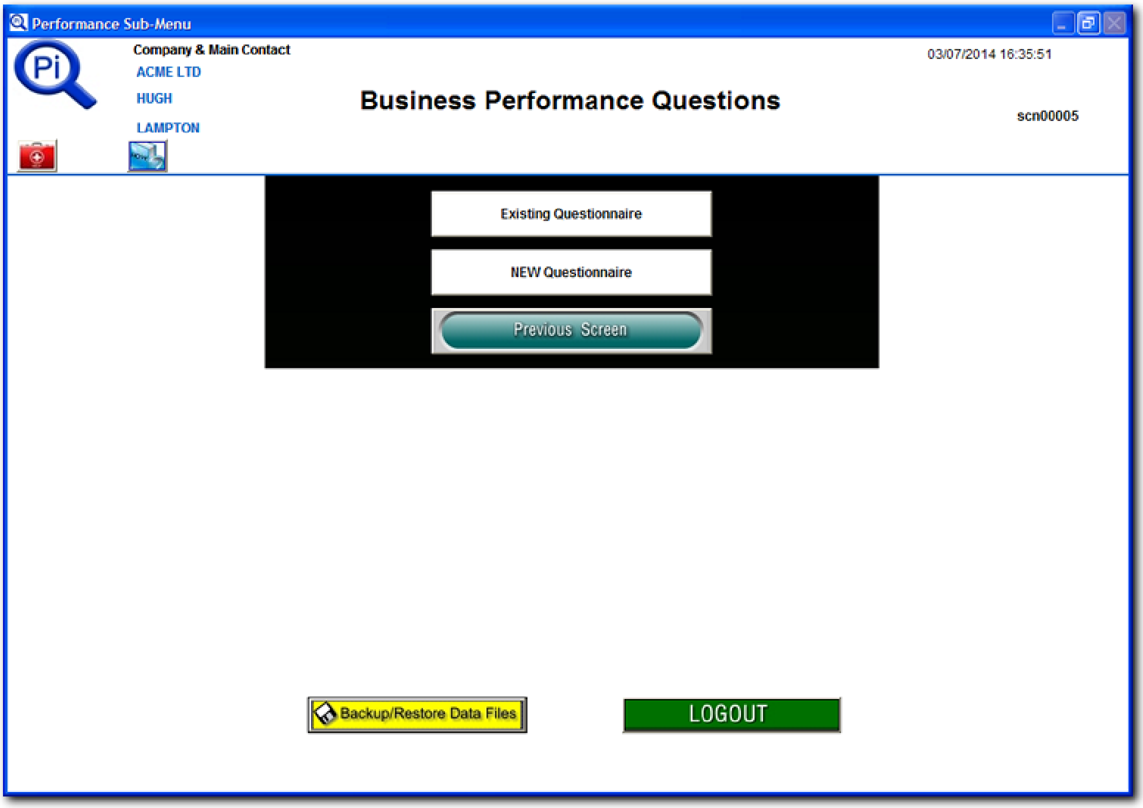
All the sections of the questionnaire work in exactly the same manner.

When you have completed work on the Goals & Objectives questionnaire remember to click the **SAVE** button to save your answers to the current section before exiting. When you have done this click the **EXIT** button and you will be returned to the Goals & Objectives menu.

Return to the Goals and Objectives Menu

2.108 How Do I - Performance Menu

The Performance Menu is used to either select an existing Performance questionnaire or to create a new one.
For reporting/analysis purposes the "master" Performance questionnaire is always used, but you may create additional questionnaires to run "what-if" scenarios in terms of the "Information Capability" graph function.



This menu presents you with 3 choices : *click the buttons below to see their functions.*

Existing Questionnaire New Questionnaire Previous Screen

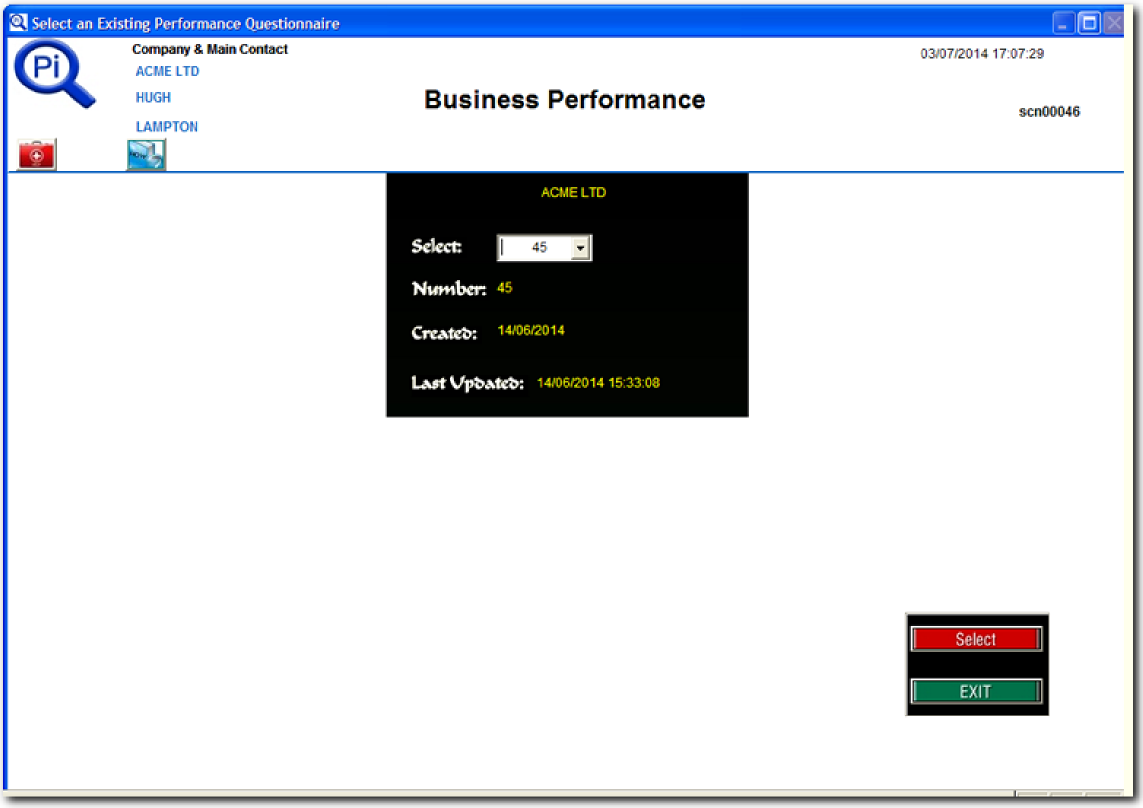
Backup / Restore data filesThis will allow you to backup or restore all the data files of the application

Pressing the **LOGOUT** button quits from the application

2.109 How Do I - Existing Performance Question

Here you can select one of the Performance questionnaires that you have created. Selection is made by using the drop down selection box. This is scrollable. There is one "master" Performance questionnaire, this represents the actual position of the company in terms of Performance and is always used for analysis and reports. However, for the purposes of running "what-if" scenarios in respect of the Information Capability graph function, you may have several versions of this questionnaire. If you wish to run a "what-if" Information Capability graph using a specific Performance questionnaire, you should select it using this screen, update it (if necessary) when you have reached the update screen (see below) and save it using the relevant SAVE button. This version will be used for all Information Capability Graphs, until you either run the Control Centre "ANALYSIS" function or if you run any of the reporting functions of the system, in which case The "master" Performance questionnaire will be re-selected automatically.

Using the Existing Performance Questionnaire



If you select the "master" version of this questionnaire it will be indicated by the word master appearing on this screen. On selection of a questionnaire the date the questionnaire was created and the last date/time it was updated will also appear.

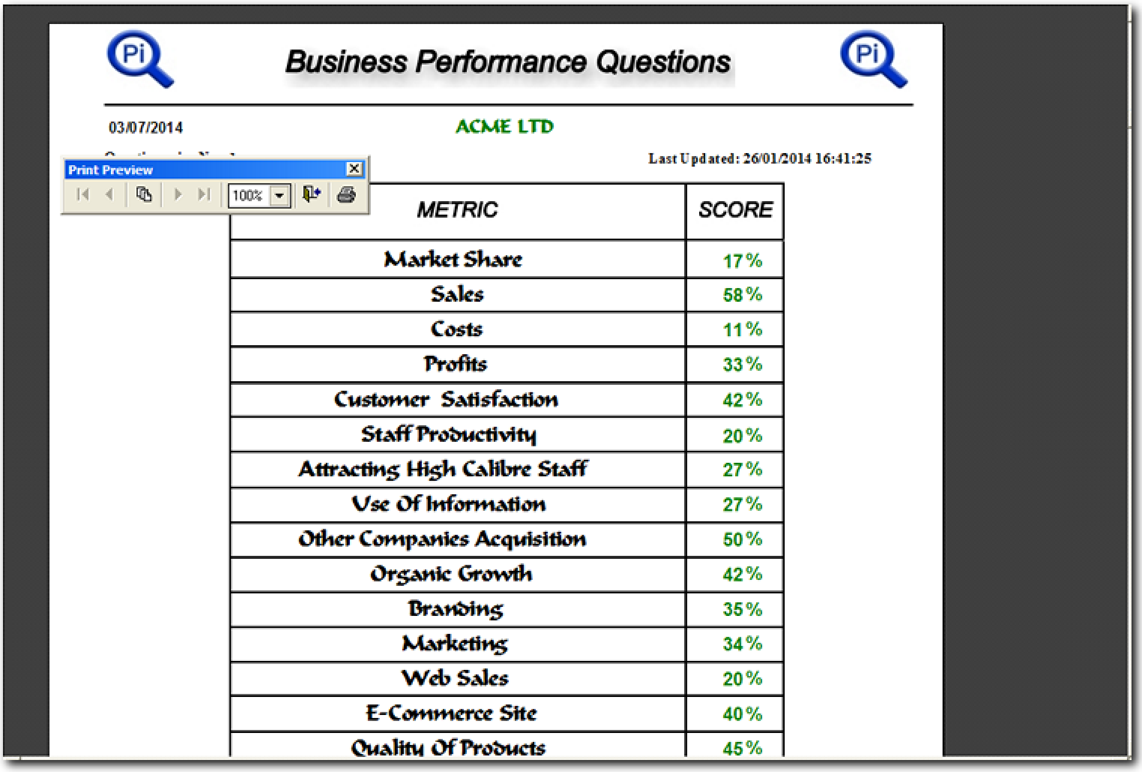
Once you have selected the Performance questionnaire that you wish to work on, you should click the **Select** button

The following screen will appear:

At the top of the screen the questionnaire number will appear. If you are editing the "master" Performance questionnaire this will also be indicated.

There are a total of 20 numbered questions to answer, split into 2 sections. Besides each number is the Metric name, to the right of this is a scrollable selection box. Using the drop down list you must select the current percentage (%) being achieved by your company for the related metric.

If you wish to review and/or print your answers you should click the printer button at the bottom of the screen on the left-hand side, labelled **"Print these Answers**". The report will be sent to the screen for review, where you can print a hardcopy, by use of the Print preview bar displayed.



Business Performance Questions

03/07/2014

ACME LTD

Last Updated: 26/01/2014 16:41:25

METRIC	SCORE
Market Share	17 %
Sales	58 %
Costs	11 %
Profits	33 %
Customer Satisfaction	42 %
Staff Productivity	20 %
Attracting High Calibre Staff	27 %
Use Of Information	27 %
Other Companies Acquisition	50 %
Organic Growth	42 %
Branding	35 %
Marketing	34 %
Web Sales	20 %
E-Commerce Site	40 %
Quality Of Products	45 %

When you have finished entering your answers for this section, you may SAVE them by either clicking on the **SAVE** button at the bottom of the screen on the right-hand side, or by clicking the navigational button on the left hand side, labelled "Other Parts of Questionnaire to Answer". Clicking the navigational button will take you to the requested section of the questionnaire.

All the sections of the questionnaire work in exactly the same manner.

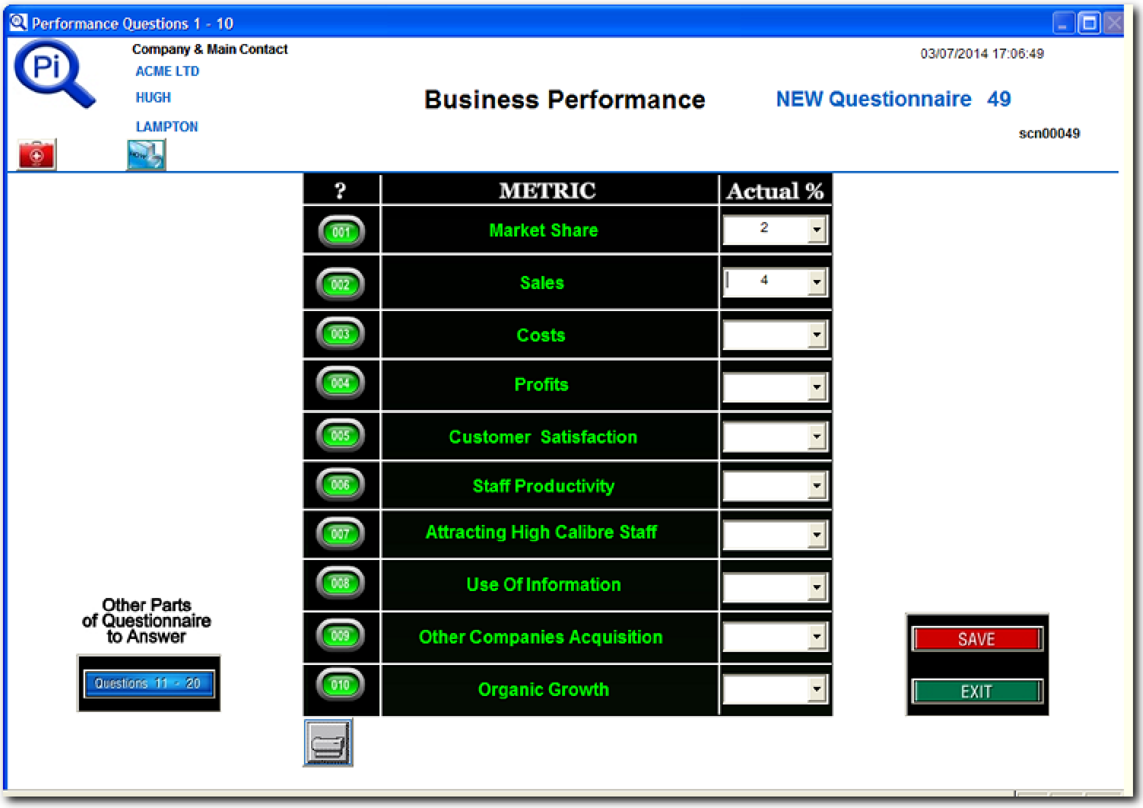
When you have completed work on the Performance questionnaire remember to click the **SAVE** button to save your answers to the current section before exiting. When you have done this click the **EXIT** button and you will be returned to the Performance menu.

Return to the Performance Menu

2.110 How Do I - NEW Performance Questionnaire

*NOTE There is one "master" Performance questionnaire; this represents the actual position of the company in terms of Performance and is always used for analysis and reports. However, for the purposes of running "what-if" scenarios in respect of the Information Capability graph function, you may have several versions of this questionnaire.

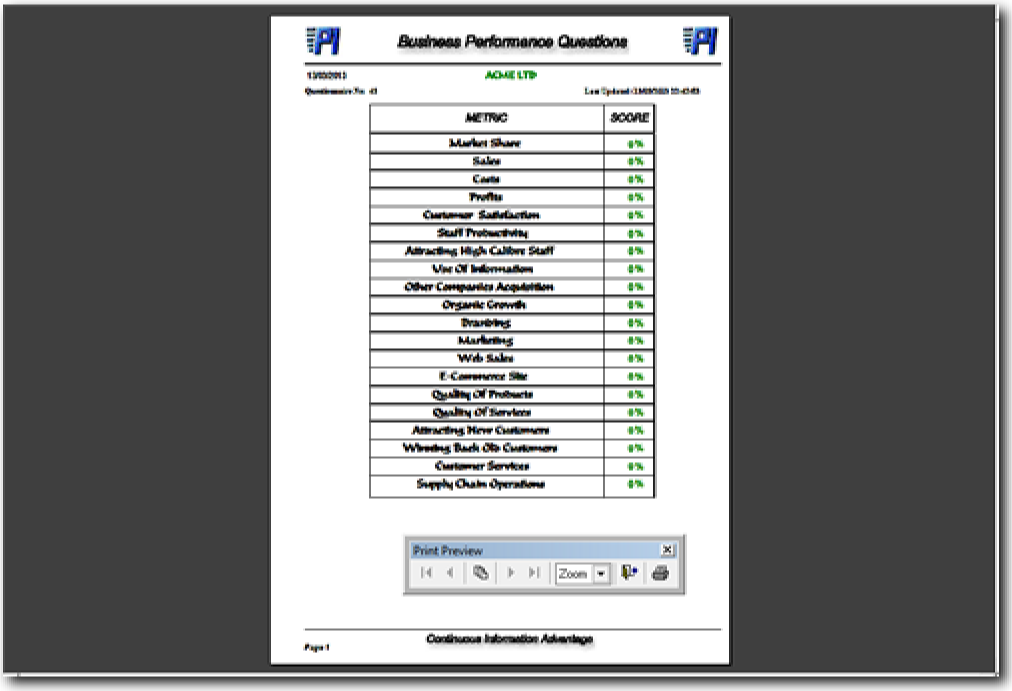
Using the NEW Performance Questionnaire



At the top of the screen the questionnaire number will appear.

There are a total of 20 numbered questions to answer, split into 2 sections. Besides each number is the Metric name, to the right of this is a scrollable selection box. Using the drop down list you must select the current percentage (%) being achieved by your company for the related metric.

If you wish to review and/or print your answers you should click the printer button at the bottom of the screen on the left-hand side, labelled **"Print these Answers**". The report will be sent to the screen for review, where you can print a hardcopy, by use of the Print preview bar displayed.



When you have finished entering your answers for this section, you may SAVE them by either clicking on the **SAVE** button at the bottom of the screen on the right-hand side, or by clicking the navigational button on the left hand side, labelled "Other Parts of Questionnaire to Answer". Clicking the navigational button will take you to the requested section of the questionnaire.

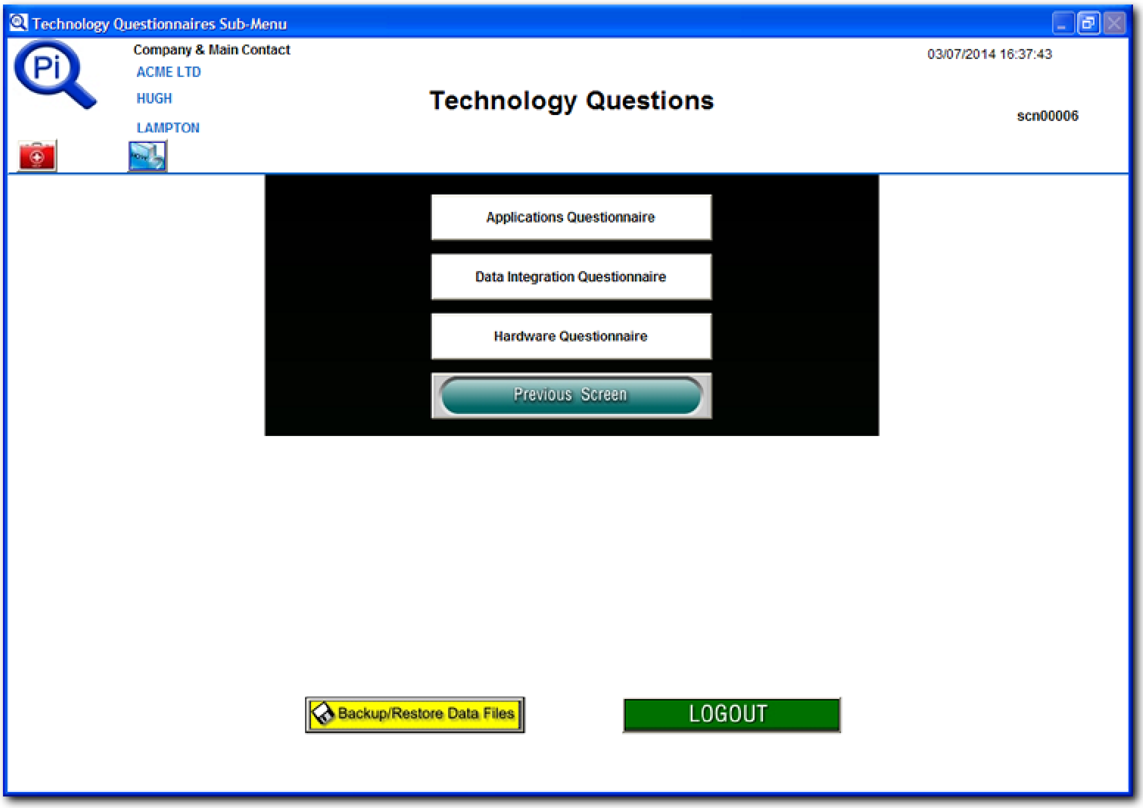
All the sections of the questionnaire work in exactly the same manner.

When you have completed work on the Performance questionnaire remember to click the **SAVE** button to save your answers to the current section before exiting. When you have done this click the **EXIT** button and you will be returned to the Performance menu.

Return to the Performance Menu

2.111 How Do I - Technology Menu

The Technology Menu gives you access to the Applications, Data Integration and Hardware questionnaires of the system.



This menu presents you with 3 choices : *click the buttons below to see their functions.*

Applications   Data Integration   Hardware   Previous Screen

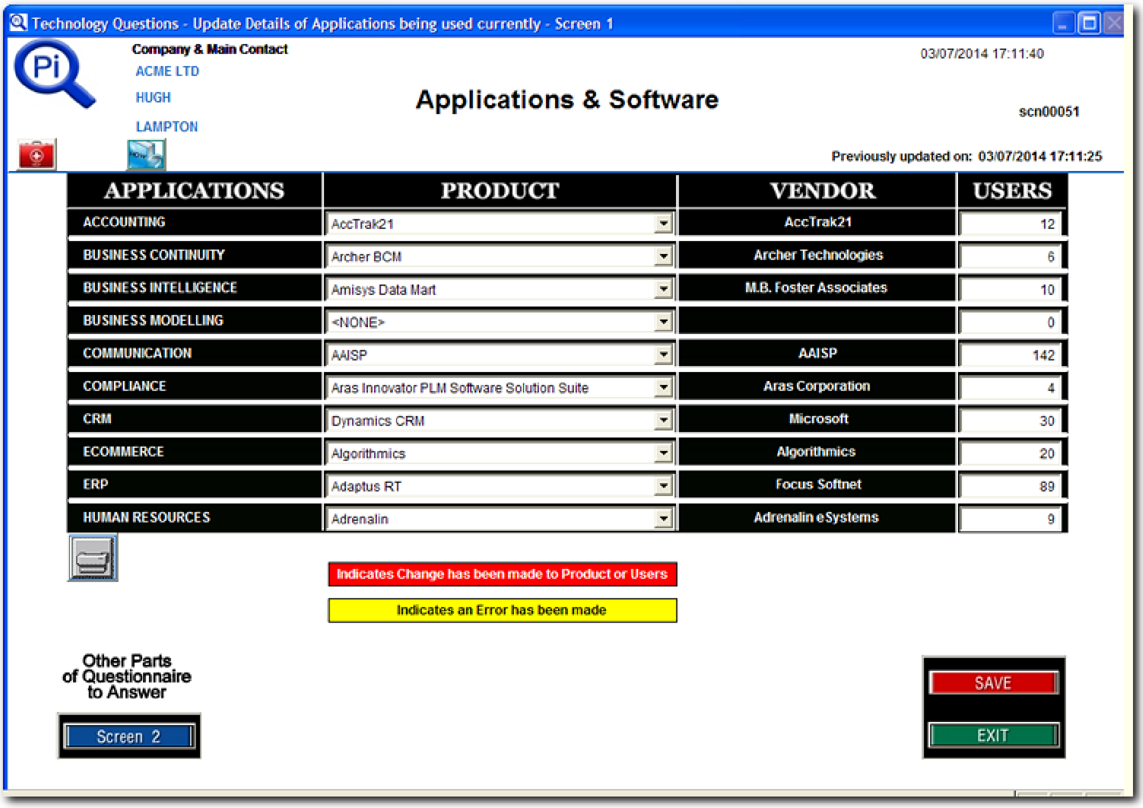
Backup / Restore data filesThis will allow you to backup or restore all the data files of the application

Pressing the **LOGOUT** button quits from the application

2.112 How Do I - Applications Questionnaire

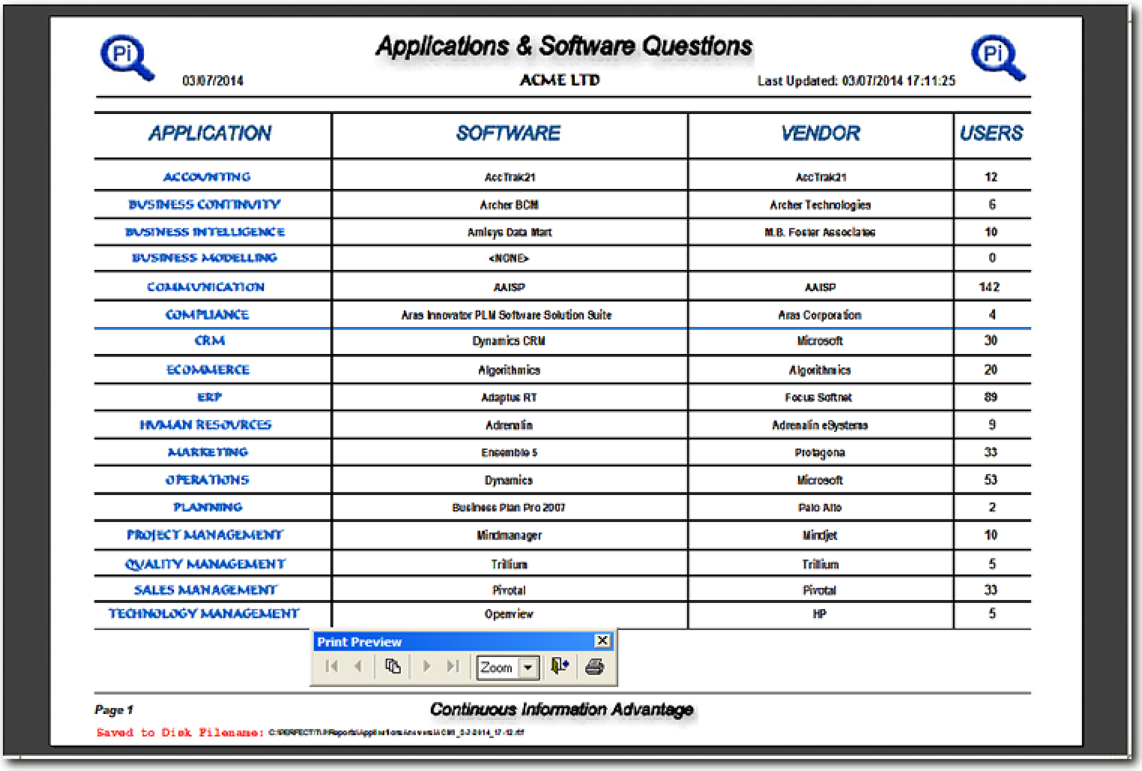
On this screen you must identify the software products that you have installed for each 17 application areas of your company.

Using the Applications Questionnaire



At the top of the screen on the left hand side the date that you last updated these details will be displayed.
There are 17 questions to answer, split across two input sections. On the left hand side of the screen is the application area. Besides this you must select the software/application (product) that you have installed. You do this by selecting the appropriate product from the drop-down list provided. If you do not have any software installed for a particular application area you should select "<NONE>" from the list. If you have a product installed that does not appear on the list you should use theTechnology Reference File Maintenance function to add your product to the list and then return to this screen to update your application questionnaire.
When you have selected the software/application for an application area you should then enter the number of staff who are using the product in the related input area under the USERS column heading.

If you wish to review and/or print your answers you should click the printer button at the bottom of the screen on the left-hand side, labelled **"Print these Answers**". The report will be sent to the screen for review, where you can print a hardcopy, by use of the Print preview bar displayed.



Applications & Software Questions

03/07/2014 — ACME LTD — Last Updated: 03/07/2014 17:11:25

APPLICATION	SOFTWARE	VENDOR	USERS
ACCOUNTING	AccTrak21	AccTrak21	12
BUSINESS CONTINUITY	Archer BCM	Archer Technologies	6
BUSINESS INTELLIGENCE	Amlsys Data Mart	M.B. Foster Associates	10
BUSINESS MODELLING	<NONE>		0
COMMUNICATION	AAISP	AAISP	142
COMPLIANCE	Aras Innovator PLM Software Solution Suite	Aras Corporation	4
CRM	Dynamics CRM	Microsoft	30
ECOMMERCE	Algorithmics	Algorithmics	20
ERP	Adaptus RT	Focus Softnet	89
HUMAN RESOURCES	Adrenalin	Adrenalin eSystems	9
MARKETING	Ensemble 5	Protagona	33
OPERATIONS	Dynamics	Microsoft	53
PLANNING	Business Plan Pro 2007	Palo Alto	2
PROJECT MANAGEMENT	Mindmanager	Mindjet	10
QUALITY MANAGEMENT	Trillium	Trillium	5
SALES MANAGEMENT	Pivotal	Pivotal	33
TECHNOLOGY MANAGEMENT	Openview	HP	5

Page 1 — Continuous Information Advantage

Saved to Disk Filename:

When you have finished entering your answers for this section, you may SAVE them by either clicking on the **SAVE** button at the bottom of the screen on the right-hand side, or by clicking the navigational button on the left hand side, labelled "Other Parts of Questionnaire to Answer". Clicking the navigational button will take you to the requested section of the questionnaire.

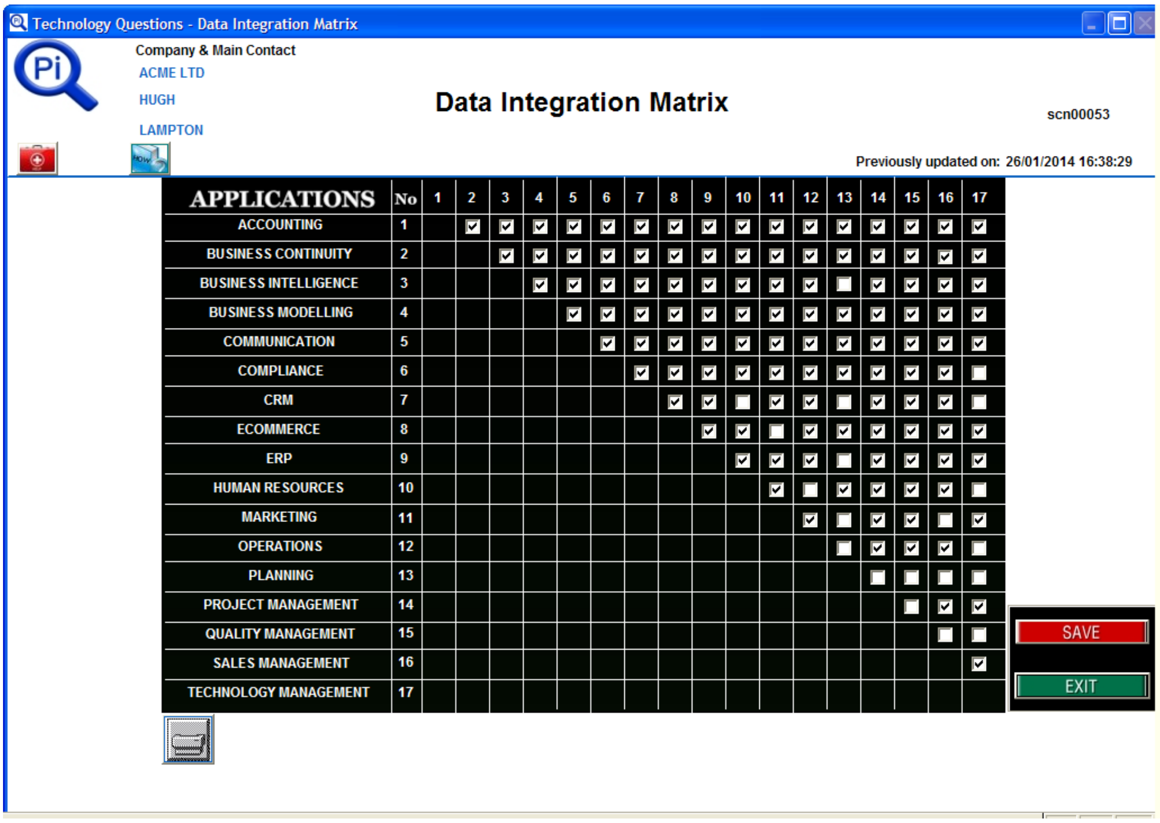
All the sections of the questionnaire work in exactly the same manner.

When you have completed work on the Applications questionnaire remember to click the **SAVE** button to save your answers to the current section before exiting. When you have done this click the **EXIT** button and you will be returned to the Technology Menu

2.113 How Do I - Data Integration Questionnair

Here you must identify which applications exchange data i.e. data is passed from one application to the other.

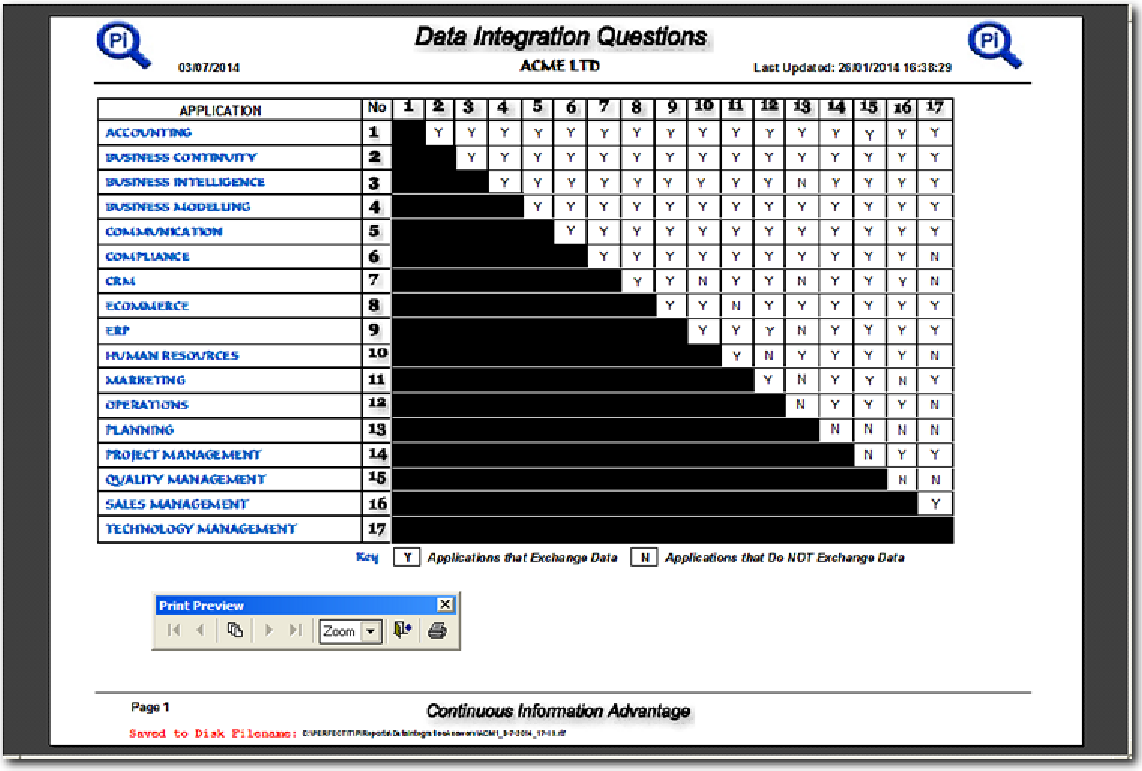
Using the Data Integration Questionnaire



At the top of the screen on the left hand side the date that you last updated these details will be displayed.

The screen in effect is a 17 x 17 matrix. You must indicate which applications exchange data by placing a tick in the appropriate intersection tick box(es). This is done by placing the cursor over the relevant box(es) and clicking the left mouse button. When you do this the appropriate Applications listed on the left hand of the screen will be highlighted to indicate the selection you have made.

If you wish to review and/or print your answers you should click the printer button at the bottom of the screen on the left-hand side, labelled **"Print these Answers**". The report will be sent to the screen for review, where you can print a hardcopy, by use of the Print preview bar displayed.



Data Integration Questions

03/07/2014 ACME LTD Last Updated: 26/01/2014 16:38:29

APPLICATION	No	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
ACCOUNTING	1		Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
BUSINESS CONTINUITY	2			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
BUSINESS INTELLIGENCE	3				Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y
BUSINESS MODELLING	4					Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
COMMUNICATION	5						Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
COMPLIANCE	6							Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N
CRM	7								Y	Y	N	Y	Y	N	Y	Y	Y	N
ECOMMERCE	8									Y	Y	N	Y	Y	Y	Y	Y	Y
ERP	9										Y	Y	Y	N	Y	Y	Y	Y
HUMAN RESOURCES	10											Y	N	Y	Y	Y	Y	N
MARKETING	11												Y	N	Y	Y	N	Y
OPERATIONS	12													N	Y	Y	Y	N
PLANNING	13														N	N	N	N
PROJECT MANAGEMENT	14															N	Y	Y
QUALITY MANAGEMENT	15																N	N
SALES MANAGEMENT	16																	Y
TECHNOLOGY MANAGEMENT	17																	

Key Y Applications that Exchange Data N Applications that Do NOT Exchange Data

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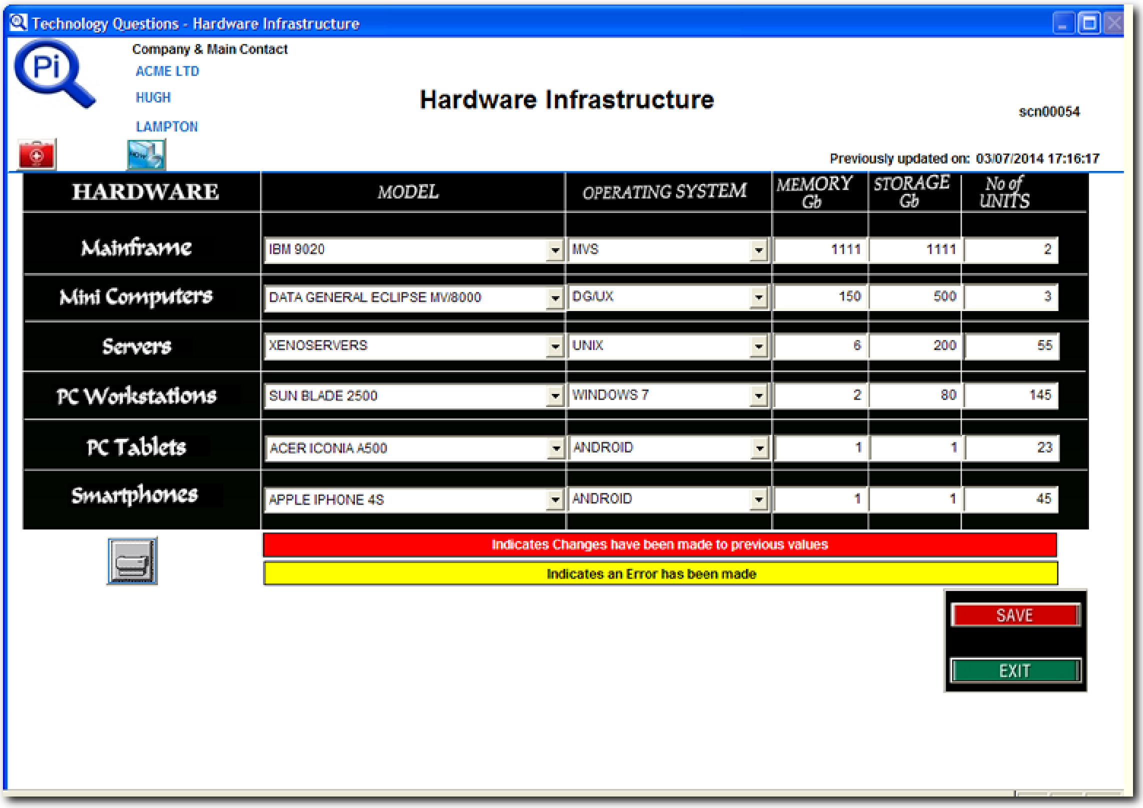
Saved to Disk Filename:

When you have finished entering your answers, you may SAVE them by clicking on the **SAVE** button at the bottom of the screen on the right-hand side.
When you have completed work on the Data Integration questionnaire remember to click the **SAVE** button to save your answers before exiting. When you have done this click the **EXIT** button and you will be returned to the Technology menu

2.114 How Do I - Hardware Questionnaire

Here you must identify the various Hardware components installed at your company.

Using the Hardware Questionnaire

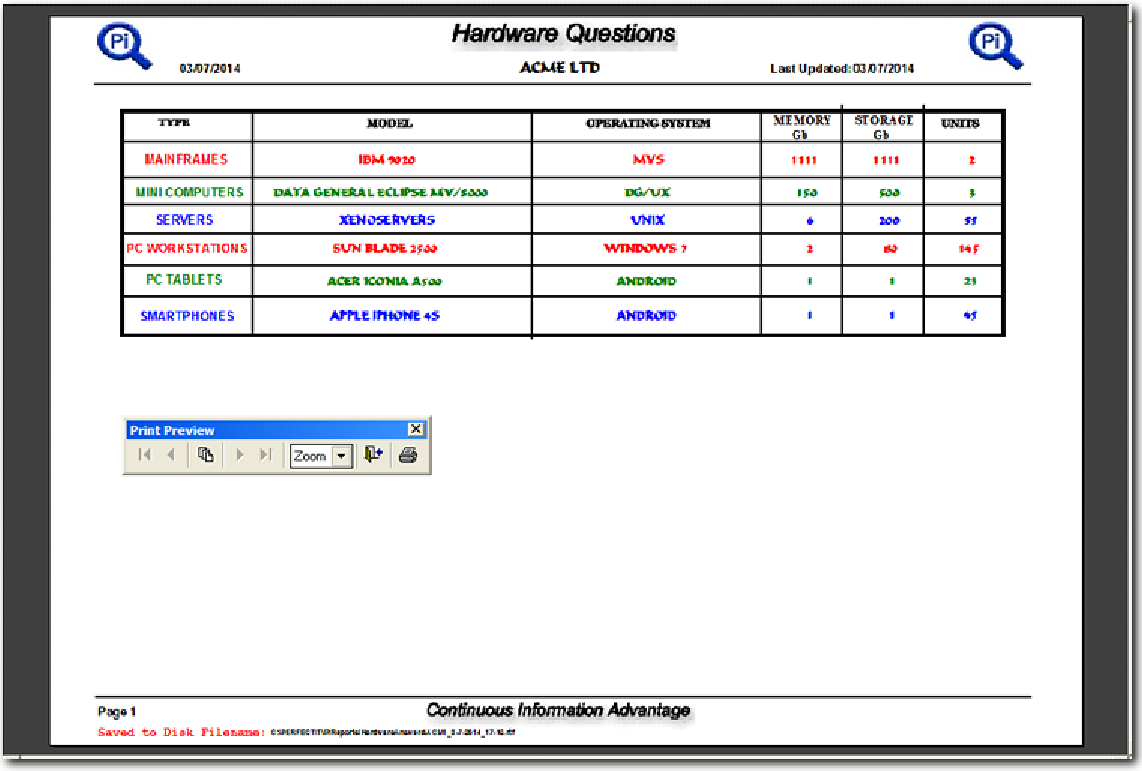


At the top of the screen on the left hand side the date that you last updated these details will be displayed.
You must indicate which Hardware, operating systems, memory, storage space and number of units you have installed for each of the four categories identified viz; Mainframe, Min computers, Servers and PC workstations.
Selection of model and operating system is made by use of the drop-down selection lists provided.

If you have a model or operating system installed that does not appear on the lists you should use the Technology Reference File Maintenance function to add these to the appropriate list and then return to this screen to update your hardware questionnaire.

When you have selected the hardware and operating system you should enter the memory, storage space and number of units for the related hardware.

If you wish to review and/or print your answers you should click the printer button at the bottom of the screen on the left-hand side, labelled **"Print these Answers**". The report will be sent to the screen for review, where you can print a hardcopy, by use of the Print preview bar displayed.

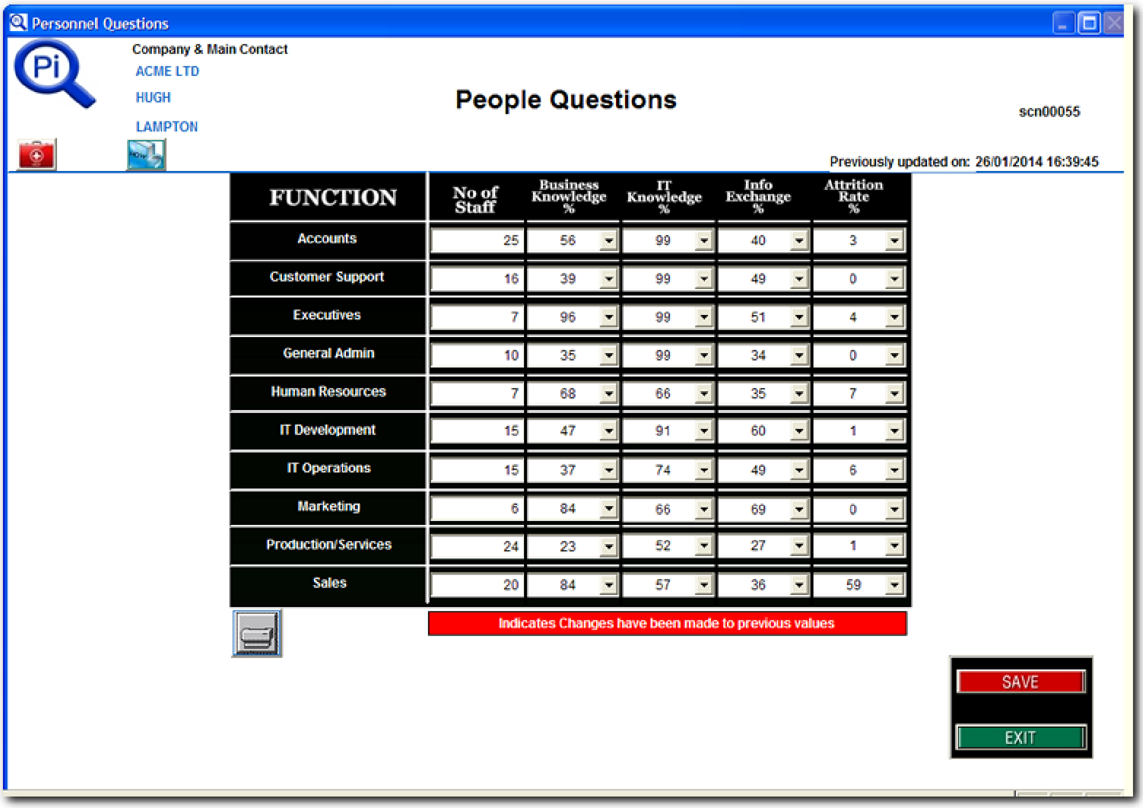


When you have finished entering your answers, you may SAVE them by clicking on the **SAVE** button at the bottom of the screen.
When you have completed work on the Hardware questionnaire remember to click the **SAVE** button to save your answers before exiting. When you have done this click the **EXIT** button and you will be returned to the Technology menu

2.115 How Do I - People Questions

Here you must enter details about the personnel that work in your organisation.

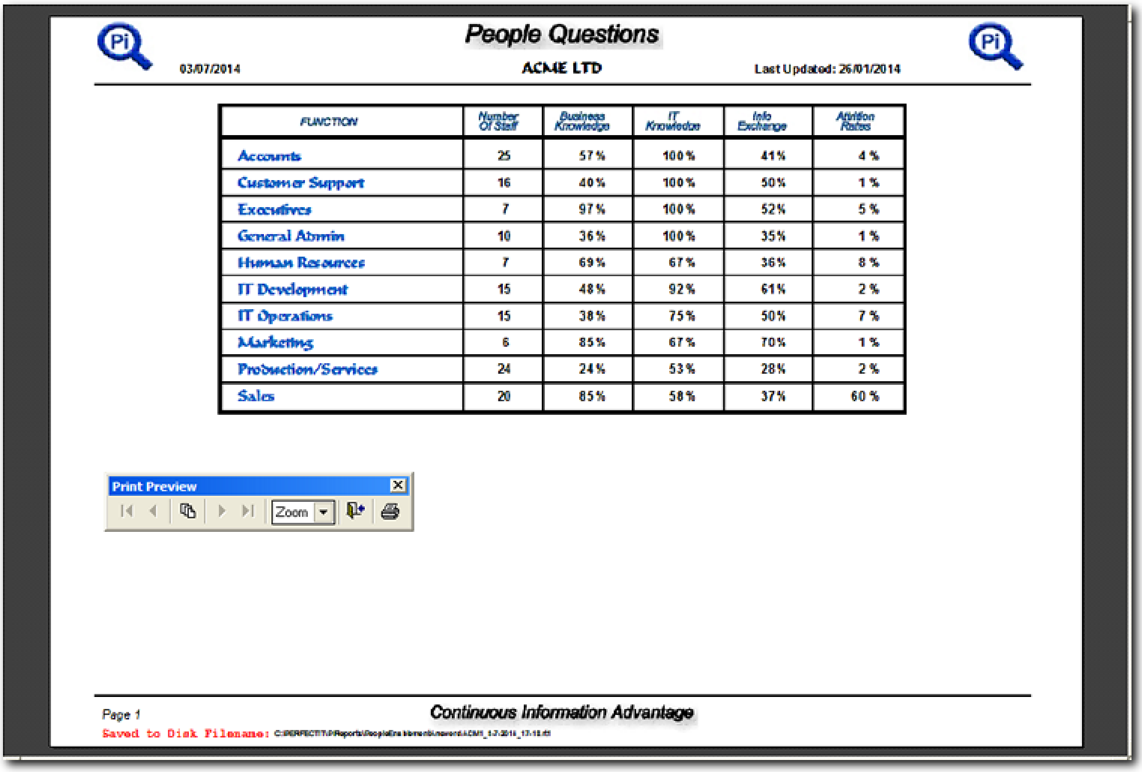
Using the Personnel Questionnaire



At the top of the screen on the left hand side the date that you last updated these details will be displayed.

On this screen you must enter, for each of the identified functions, the number of staff, the average percentage (%) of Knowledge of the Business of your company, the average percentage (%) of knowledge of the applications that they use, the average percentage in terms of exchanging information with other functions and the average annual attrition rate. The percentage figures are selected by using the drop-down lists provided.

If you wish to review and/or print your answers you should click the printer button at the bottom of the screen on the left-hand side, labelled **"Print these Answers**". The report will be sent to the screen for review, where you can print a hardcopy, by use of the Print preview bar displayed.



People Questions

03/07/2014 ACME LTD Last Updated: 26/01/2014

FUNCTION	Number Of Staff	Business Knowledge	IT Knowledge	Info Exchange	Attrition Rates
Accounts	25	57 %	100 %	41 %	4 %
Customer Support	16	40 %	100 %	50 %	1 %
Executives	7	97 %	100 %	52 %	5 %
General Admin	10	36 %	100 %	35 %	1 %
Human Resources	7	69 %	67 %	36 %	8 %
IT Development	15	48 %	92 %	61 %	2 %
IT Operations	15	38 %	75 %	50 %	7 %
Marketing	6	85 %	67 %	70 %	1 %
Production/Services	24	24 %	53 %	28 %	2 %
Sales	20	85 %	58 %	37 %	60 %

Page 1 Continuous Information Advantage

Saved to Disk Filename:

When you have finished entering your answers, you may SAVE them by clicking on the **SAVE** button at the bottom of the screen.

When you have completed work on the Personnel questionnaire remember to click the **SAVE** button to save your answers before exiting. When you have done this click the **EXIT** button and you will be returned to the Control Centre Menu

2.116 How Do I - IC Results / Graph

The Information Capability (IC) Results /Graph is an option that allows you to get a quick graphic snapshot of your company's efficiency in terms of the collection and use of Information to support your business.

It is based on the answers that you have provided to the questionnaires of the application.

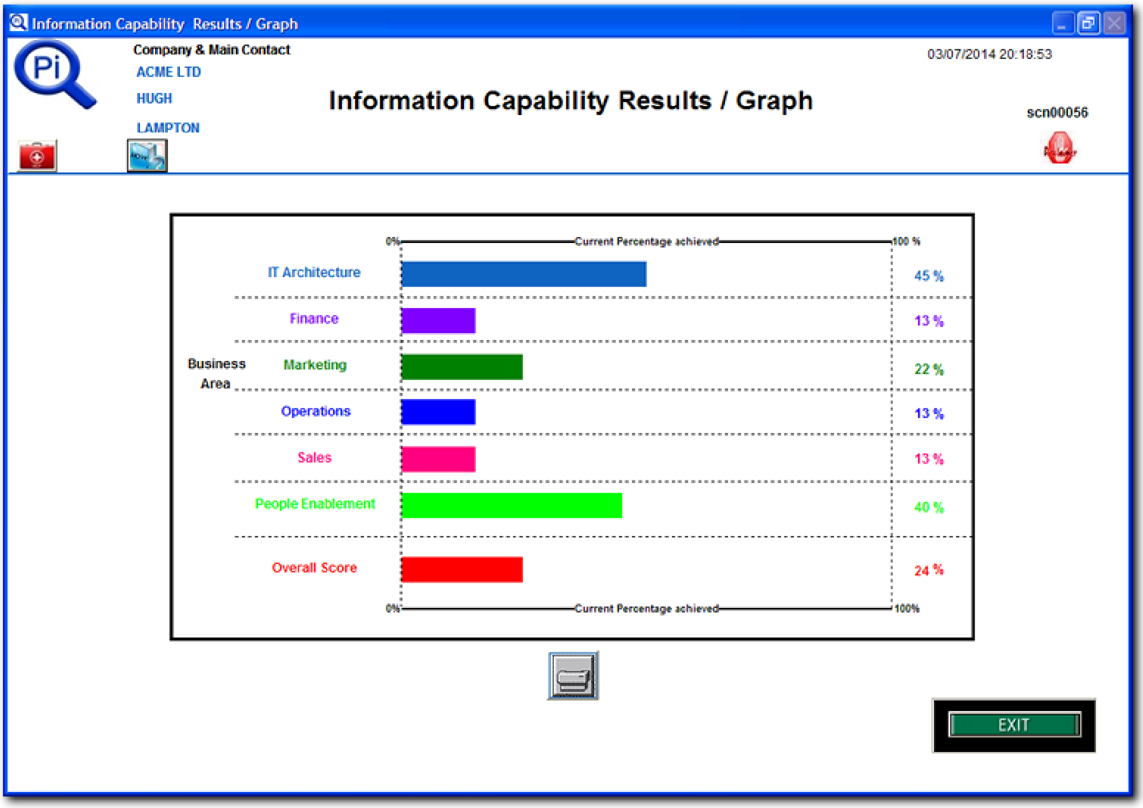
The graph results are based on the versions of the questionnaire that are currently selected. If you wish to use or re-select the MASTER copies of each questionnaire you should run the Analysis procedure. see Run Analysis
If you run the ANALYSIS function prior to running the graph, the results that you see will be based on the MASTER versions (Actual company position) of each questionnaire.

If you want to run "what-if" scenarios using other versions of the questionnaires (not the MASTER versions), you should select the required questionnaires using the appropriate Menu options:

Existing Business Processes   Existing Goals & Objectives   Existing Performance

Once you have selected a questionnaire just **SAVE** it and exit. This will make it current until you either run the ANALYSIS function or run reports, when the MASTER versions will be automatically re-selected.

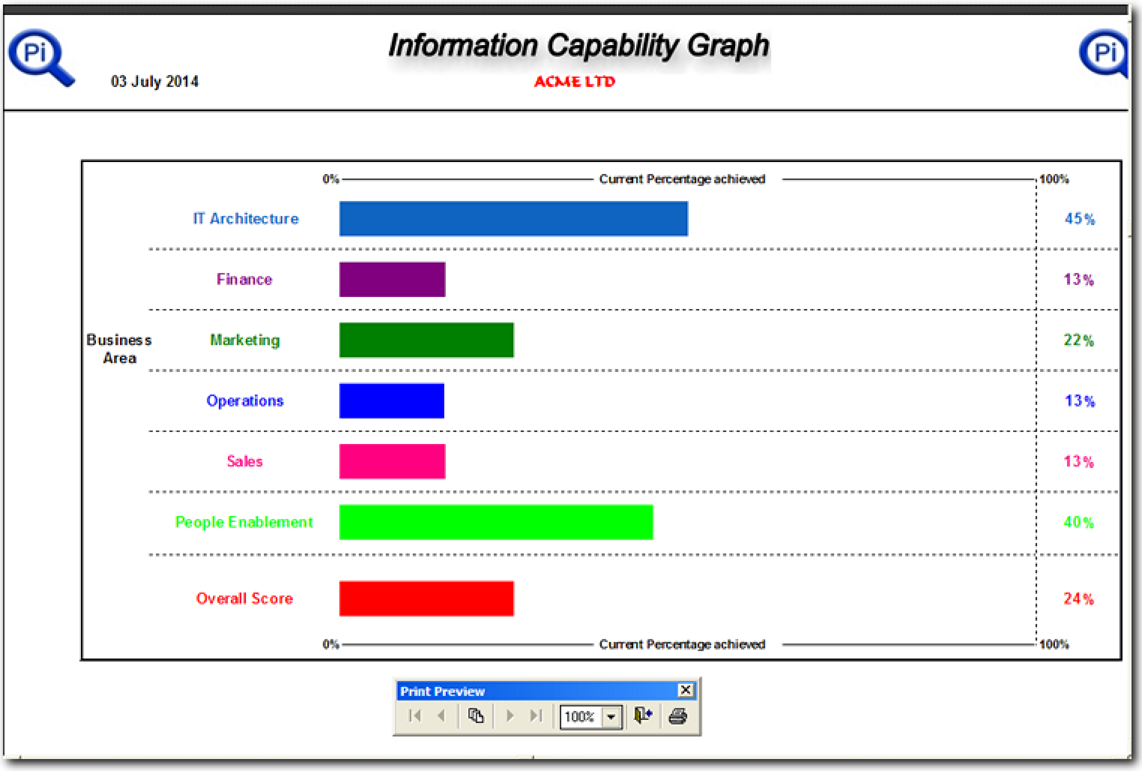
On selection of this option the following screen will appear:



The coloured bars on the graph that you will see indicate your company's Information Capability scoring in the following areas:

IT Architecture
Finance
Marketing
Operations
Sales
People Enablement
Overall Score

At the bottom of the screen on the right-hand side is EXIT button which returns you to the Control Centre Menu
If you click the button PRINT ICON button, the report will be sent to the screen for review, where you can print a hardcopy, by use of the Print preview bar displayed:



The graph/report is also saved to disk for later review. see View Information Capability Graphs

2.117 How Do I - Run Analysis

Selection of this option from the Control Centre will update all scoring throughout the system by analysing the latest answers and inputs. **Note:** This will always use the Master records from the Performance, Objectives and Business Processes Questionnaires, as these represent the actual/current position at your company and it is this position on which Pi makes its recommendations.

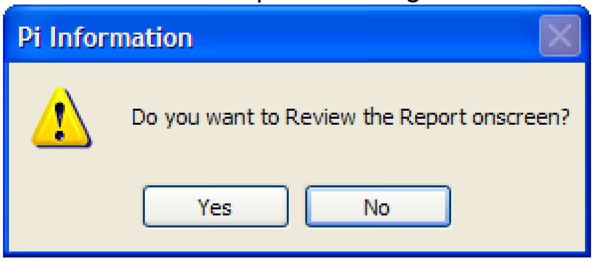
Control Centre

2.118 How Do I - Strategy Report

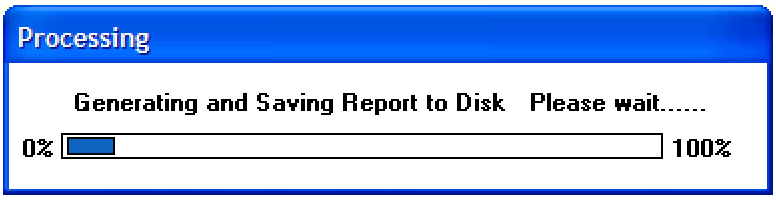
* Note before selecting this option please ensure that you have completed all the questionnaires, have made any changes to Project Roles and Rates, have run Analysis and have identified which projects are internally resourced and externally resourced.

Also see Sequence to use when running Reports

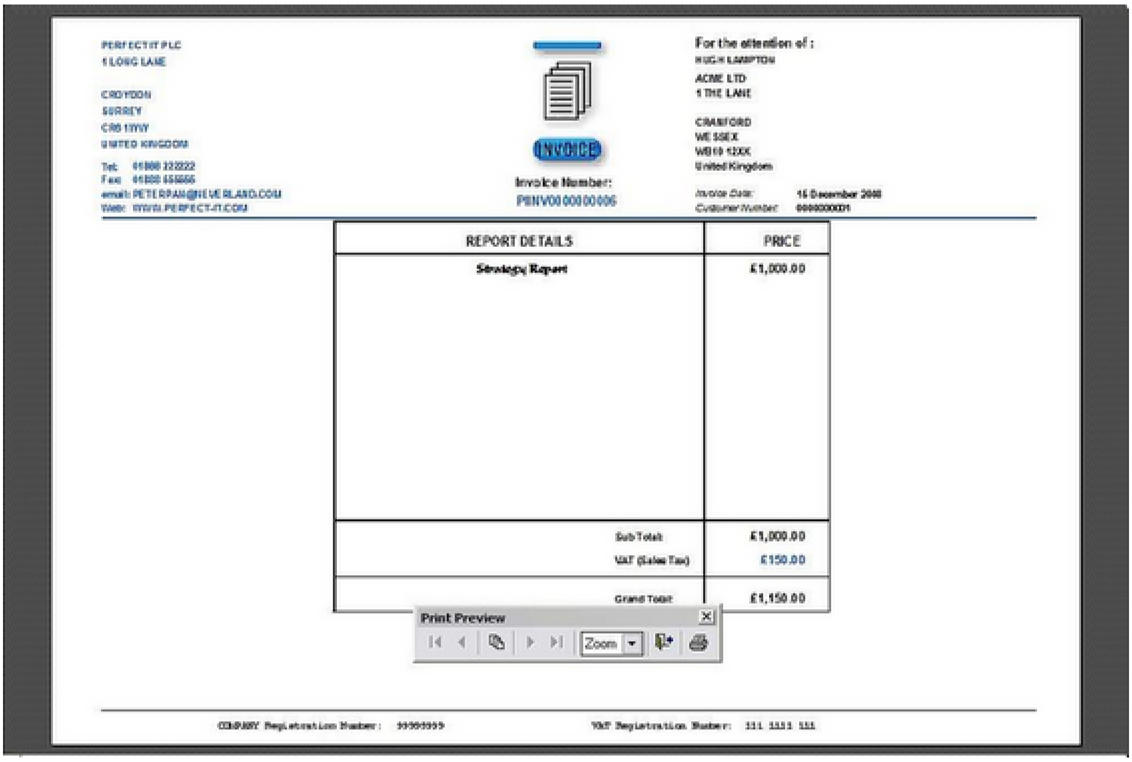
On selection of this option a dialogue box will be displayed:



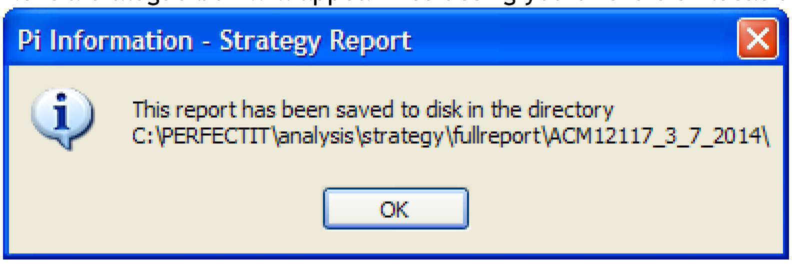
If you click the YES the Information Strategy report will be displayed on screen, from where it can be printed via the Print Preview Bar supplied. The full report is also saved to disk.
If you click NO the report will be saved to disk and a progress bar will be displayed on screen.



If you are using the Multi-Company version of the application on completion of the report generation an Invoice will be displayed on screen. This is also saved to disk.



Next a dialogue box will appear instructing you of the disk location of the saved report.



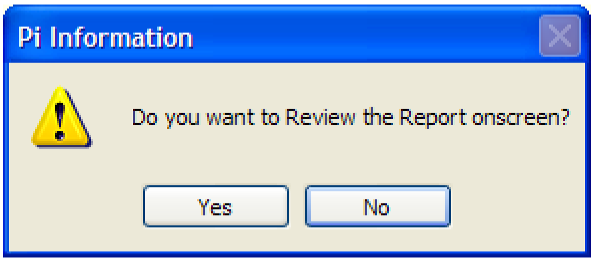
Click the **OK** button and the Control Centre Menu will be re-displayed.

2.119 How Do I - Route Map Report

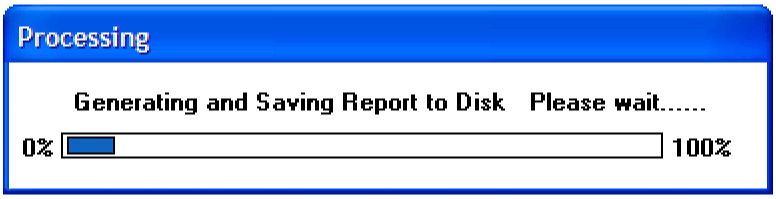
* Note before selecting this option please ensure that you have completed all the questionnaires, have made any changes to Project Roles and Rates, have run Analysis and have identified which projects are internally resourced and externally resourced.

Also see Sequence to use when running Reports

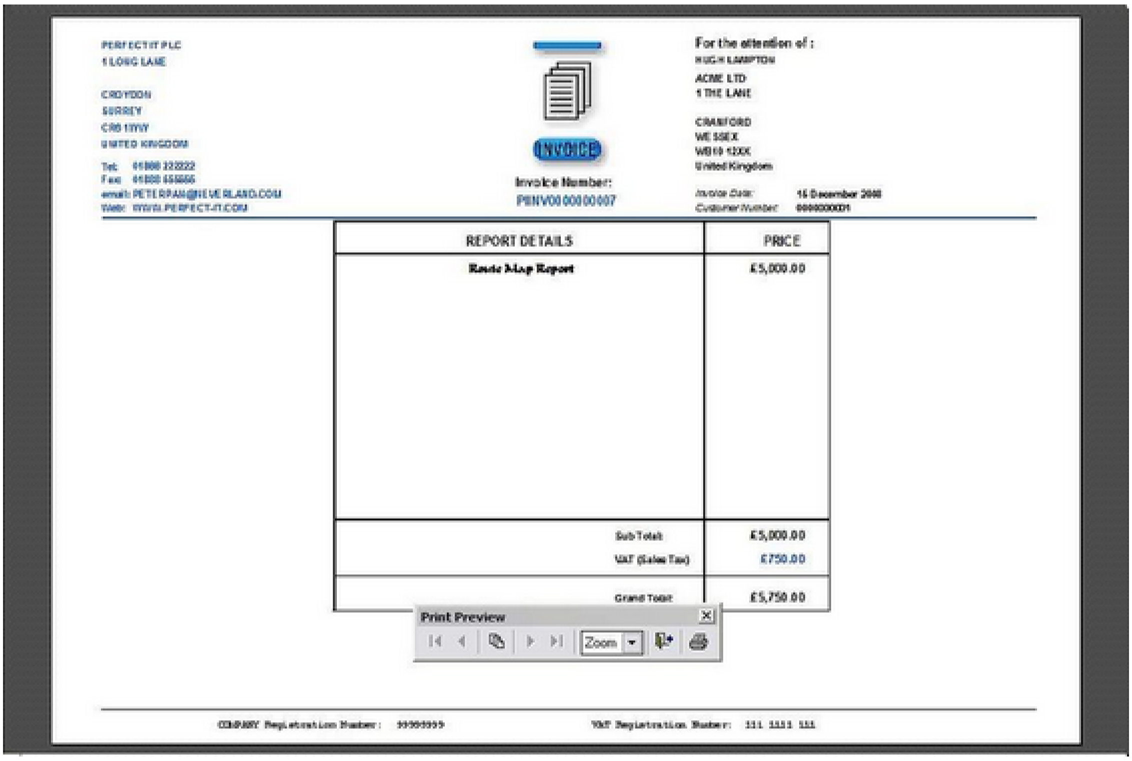
On selection of this option a dialogue box will be displayed:



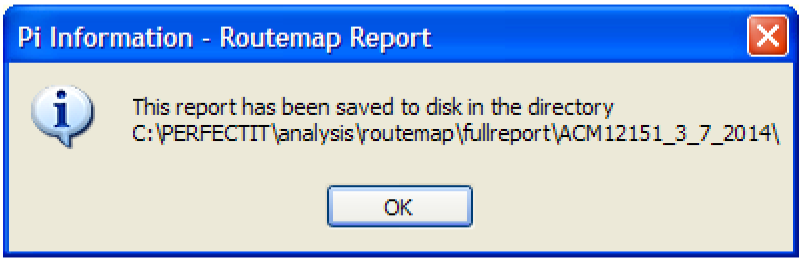
If you click the YES the Route Map report will be displayed on screen, from where it can be printed via the Print Preview Bar supplied. The full report is also saved to disk.
If you click NO the report will be saved to disk and a progress bar will be displayed on screen.



If you are using the Multi-Company version of the application on completion of the report generation an Invoice will be displayed on screen. This is also saved to disk.



Next a dialogue box will appear instructing you of the disk location of the saved report.



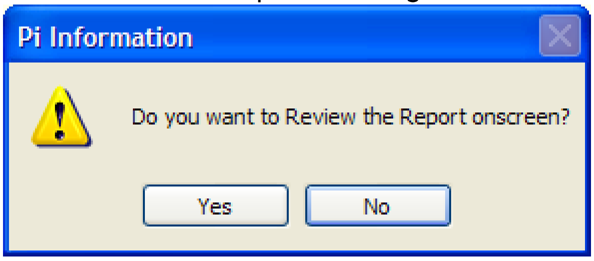
Click the **OK** button and the Control Centre Menu will be re-displayed.

2.120 How Do I - Projects Report

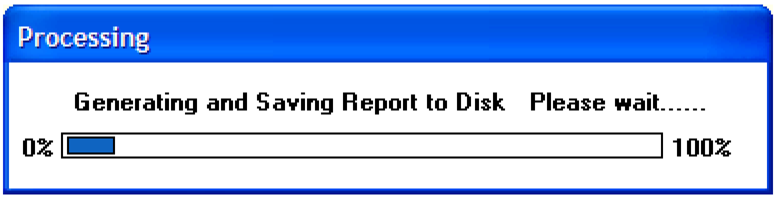
* Note before selecting this option please ensure that you have completed all the questionnaires, have made any changes to Project Roles and Rates, have run Analysis and have identified which projects are internally resourced and externally resourced.

Also see Sequence to use when running Reports

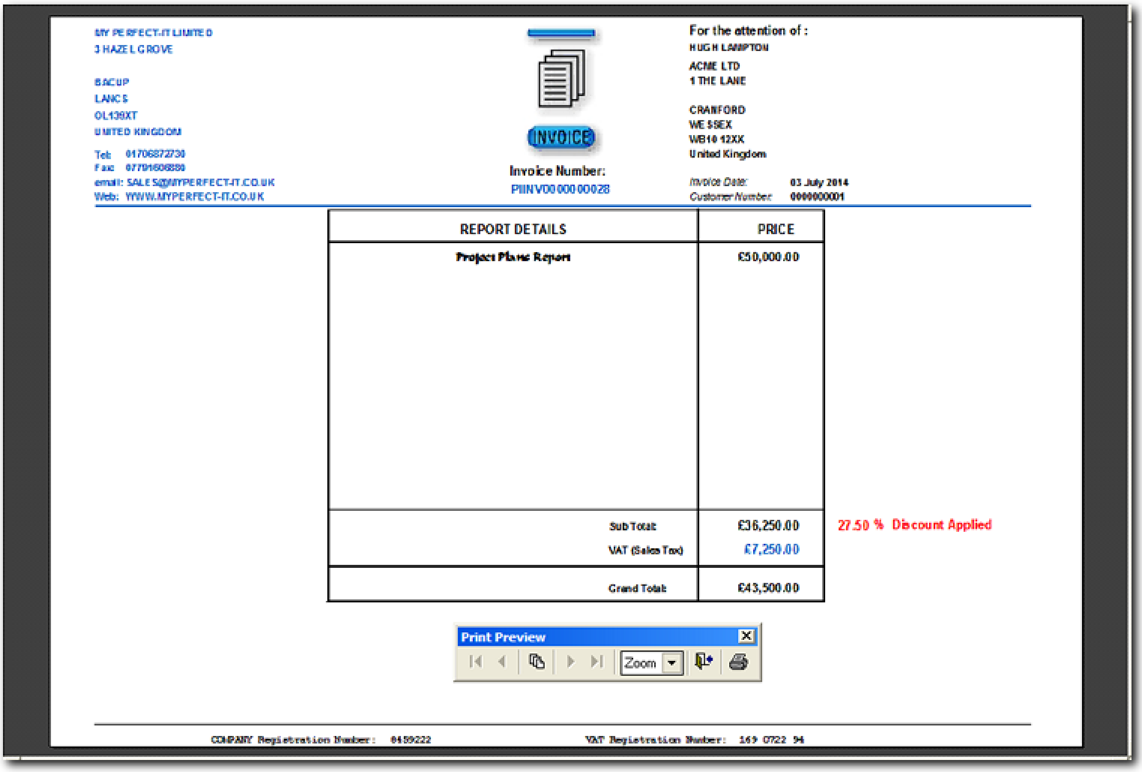
On selection of this option a dialogue box will be displayed:



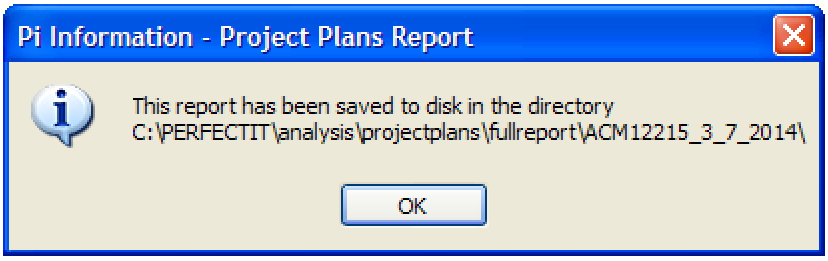
If you click the YES button the Projects report will be displayed on screen, from where it can be printed via the Print Preview Bar supplied. The full report is also saved to disk.
If you click NO the report will be saved to disk and a progress bar will be displayed on screen.



If you are using the Multi-Company version of the application on completion of the report generation an Invoice will be displayed on screen. This is also saved to disk.



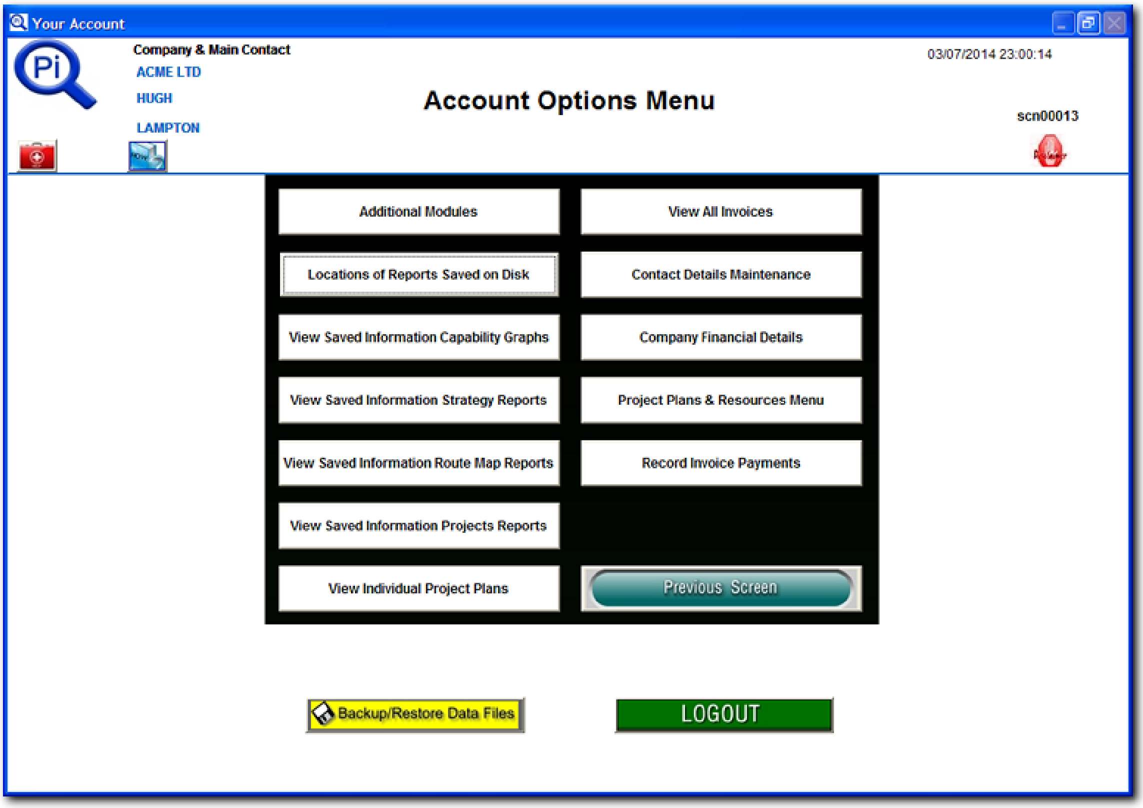
Next a dialogue box will appear instructing you of the disk location of the saved report.



Click the **OK** button and the Control Centre Menu will be re-displayed.

2.121 How Do I - Account Options Menu

This menu will allow you to review the reports and documents you have saved to disk, the related financial transactions, allow you to purchase project plans and give you access to your contact details.



For details on each option click the appropriate button below:-

Additional Modules
Location of Reports Saved On Disk
View Saved Information Capability Graphs
View Saved Information Strategy Reports
View Saved Information Route Map Reports
View Saved Information Projects Reports
View Individual Project Plans
View ALL Invoices
Contact Details Maintenance
Company Financial Details
Project Plans Menu
Record Invoice Payments
View Purchase Orders Only available in PC Standalone Single Company Version

To return to the Control Centre you should click the **Previous Screen** button.

Backup / Restore data filesThis will allow you to backup or restore all the data files of the application

Pressing the **LOGOUT** button quits from the application

2.122 Disclaimer

Pi Disclaimer

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