ST SYNERGY

HOUSEKEEPING/SETUP

TECHNICAL WHITE PAPER

Total control over your data environment

A complete data management solution is only as good as its relationship to your specific data capture needs. Not only do information systems have to be integrated, administrators must be able to configure and develop data strategies for their enterprise without the complexities of program level changes.

Not only do these configurations need to be easy and intuitive – they need to have the guarantee that system imposed rules and procedures for data capture are not compromised.

ST Synergy is ST Synergy's information management flagship and built right into the heart of ST Synergy is our commitment to ease of configuration and a development philosophy that insists that almost every data capture element must be capable of definition and retrieval with the minimum of fuss.

This new age perception required a fresh approach to the problems of data definition and management. At ST Synergy we set a standard that would embody the following in a coherent whole:

- Allowing administrators to set, define and edit information capture on a consistent level, using a universal two-tier approach.

- Ensuring that actual data capture conformed to these pre-defined system rules and procedures.

- Empowering administrators with little or no knowledge of database programming with the tools to create sophisticated data definitions.

Setting up shop

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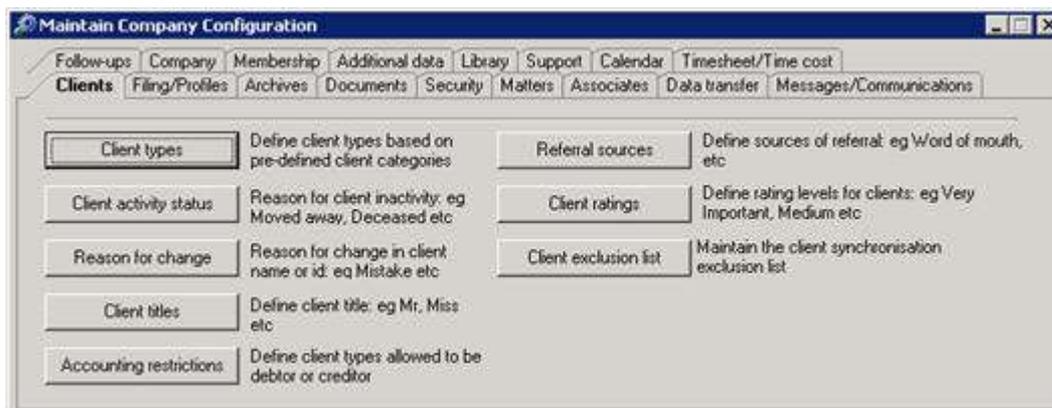
Synergy's Housekeeping module – showing major segments

At the heart of ST Synergy is the housekeeping module – this series of sub-systems enables ST Synergy to operate as the data solution for all kinds of organisations.

ST Synergy allows administrators to define and manage all of the essential elements of the enterprise database. These parameters may be accessed via the Housekeeping module (shown above).

Amongst the various items that administrators may define are:

- the methods of categorising enterprise documents
- the contact types that the organisation wishes to track
- category and rating types for enterprise clients
- Security definitions for restricting access to information within the database.

For example, the client(entity) classification system allows the detailed definition of the different types of entities that may be dealt with (eg Customers, Suppliers etc)

What is important to note is that the major topic grouping (Client Type) and its attendant grouping of sub-topics (Client Type Sub Category) can be set and defined by the administrator to suit the particular requirements of the organisation.

Two-Tier Corporate Filing

ST Synergy employs a unique two-tier filing system that is designed to ensure that the enterprise gets the utmost flexibility possible in terms of corporate filing requirements for documents, email, telephone calls etc.

The first or top-tier is called the 'category' whereas the second-tier is referred to as the 'subject'. Accordingly, categories represent a collection of subjects. Categories thus comprise a logical grouping of subjects under a convenient heading. An example of three categories and their respective subjects as they relate to grouping of documents appears below.

Category (top-tier)	Subject (second-tier)
Administration	Banking
	Freight
	General
	Insurance
	Legal
Sales & Marketing	Brochures
	Orders
	Pricing
	Quotes
Professional Services	Planning
	Recommendations
	Requirements
	Work-papers

As the above are example categories and subjects only, they may or may not bear any resemblance to the filing system needs of your organisation.

Prior to configuration, the person(s) assigned as the ST Synergy Administrator(s) within an organisation often already have a good idea of what category/subject model will suit the needs of the organisation. By careful analysis of this area, Administrators will find that the logical grouping and locating of enterprise documents/contacts/workflow etc becomes easy and ordered.

Defining client demographics (Profiling)

This area allows administrators to define appropriate profiles that allow for the logical categorisation and sorting of clients. This in turn allows administrators to segment and analyse their ST Synergy database in a more accurate and logical manner, thus allowing for easier retrieval of grouped information in respect of clients.

Client categories are a means of identifying clients by allocating them to a particular class, and a client can belong to one or more of these classes.

A typical client grouping may be as follows:

Primary grouping (top-tier)	Sub-group (second-tier)
Suppliers/Vendors	Equipment supplier
	Stationery
	Electrical contractor
Industry	Mining
	Electrical
	Travel
Major equipment	Front-end loader
	Prime mover

For example, the above grouping would allow you to track which of your customers were in the 'mining industry' and used 'prime movers'. Due to the fact that you may define any number and combination of these categories, this feature allows administrators to build almost any client(entity) profile/demographic model that suits the enterprise.

Drawing inter-relationships between clients

Clients(entities) do not often exist in a single dimensional relationship – so ST Synergy allows you to define any number of multi-level relationships between Clients.

For example, you may deal with a particular company (represented as a customer in ST Synergy), however you also interact with people within that company. (the CEO, directors etc). Using appropriate housekeeping functions, administrators can create a multi-dimensional model of the anticipated client relationships. This multi-dimensional model allows ST Synergy Users to engage the *Client Control Centre* to capture and track which person within any organisation is the CEO, Finance Director, Purchasing Officer etc, and which other companies are related in some way to any given organisation. You can even track multiple relationships in the event that one contact person (entity) has the same relationship to a number of other entities (eg in the case where one person happens to be the CEO of a number of organisations).

This ability to configure an unlimited number of client relationship descriptions allows administrators to easily build, report on and maintain a multi-dimensional model for their enterprise.

Client management and information regarding associated Clients is easily updated and instantly available on-line to all users.

Some typical relationships are modelled below:

| Primary grouping (top-tier)	Sub-group (second-tier)
Company	CEO
	Financial controller
	Purchasing officer
	Company/Employer
Personal	Spouse
	Brother
	Sister

Setting up contacts management

ST Synergy embodies a powerful contacts management system that allows users to track and record every contact made with customers. This contact history is filed and retrieved using subjects that administrators define for the enterprise under the two-tier corporate filing system outlined previously in this document.

Using the housekeeping module, administrators can tailor the contacts system to act as a general contacts system, a quality control system (for monitoring quality control reviews etc) or even as a help desk environment – it simply depends on enterprise usage requirements.

Again, this contact management functionality is based on the familiar two-tier model and some typical contact topics appear below:

Primary category (top-tier)	Detail-category or subject (second-tier)
Sales	Demonstrations
	Follow-up
	Seminars
Help desk	Problem review
	Resolution
	Follow-up
Engineering	Site review
	Quality Assurance
	Planning review
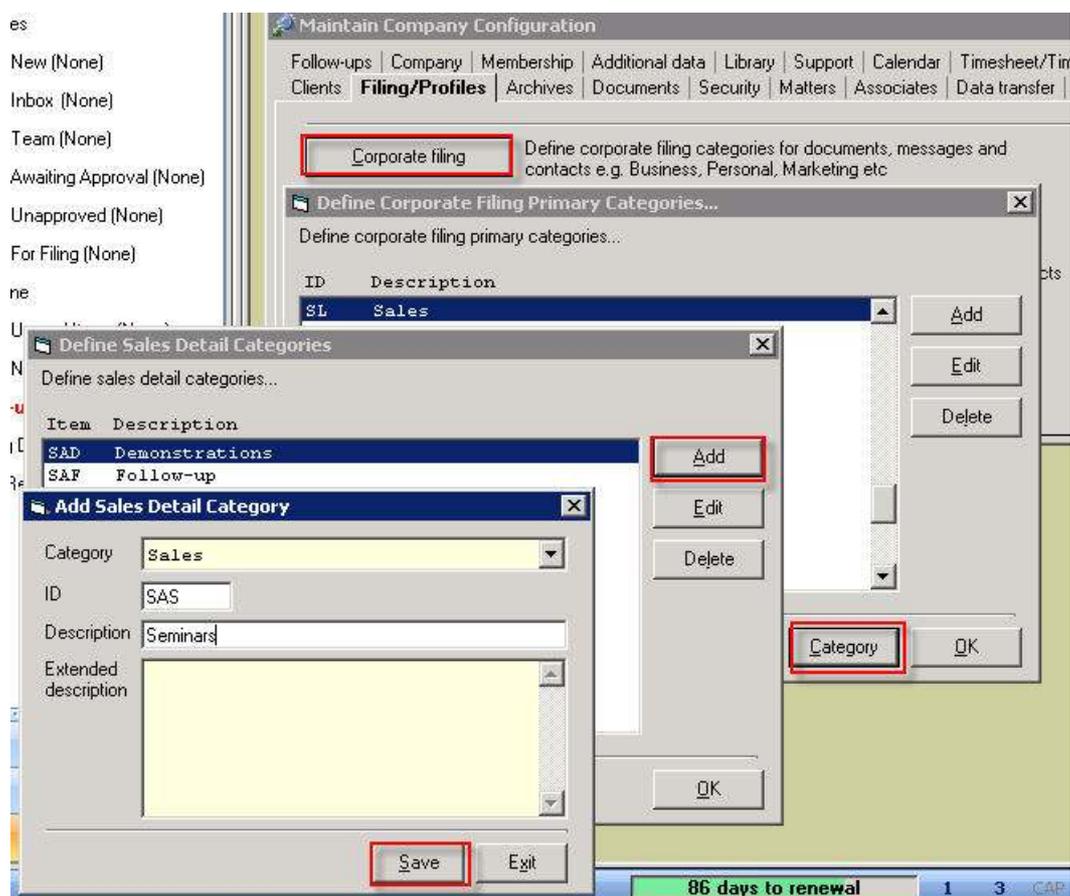
Example showing the creation of filing categories and subjects at the housekeeping(company configuration) level
ST Synergy allows users to easily use these categories and subjects to capture and file contacts made with
Customers & Suppliers, leading to true controlled yet customised, contacts management.

Defining document management

ST Synergy allows administrators to categorise enterprise documents using a natural language metaphor process. By thinking about what category/subject model suits the organisation administrators, via the housekeeping module, have the tools to deliver on the promise of logical grouping and management of enterprise electronic documents.

An example of how ST Synergy may be set up for document management functionality is illustrated below:

| Primary grouping (top-tier)	Sub-group (second-tier)
Accounting	Credit requests
	Payment requests
	Bank reconciliations
Staff manuals	Office safety procedures
	Quality Assurance (QA)
Human Resources	Work contracts
	Newsletters
	Resumes

Filing functionality and integration with desktop applications

ST Synergy automatically files documents at a document server location, taking care of naming, and sharing the file amongst enterprise users. Naturally appropriate security restrictions allow administrators to define who can see the contents of sensitive documents.

The housekeeping module also allows administrators to define and change the enterprise document server repositories as required. Additionally, administrators can register appropriate application types with ST Synergy, allowing the organisations desktop applications to work seamlessly with the document library.

Once configured via the housekeeping module, ST Synergy allows users to simply click on a document title and launch the document with the software taking care of knowing where to retrieve the file and even which host application is required to launch it. With ST Synergy users can finally work with documents on a logical level, leaving the system to take care of electronic filing locations and launching Applications.
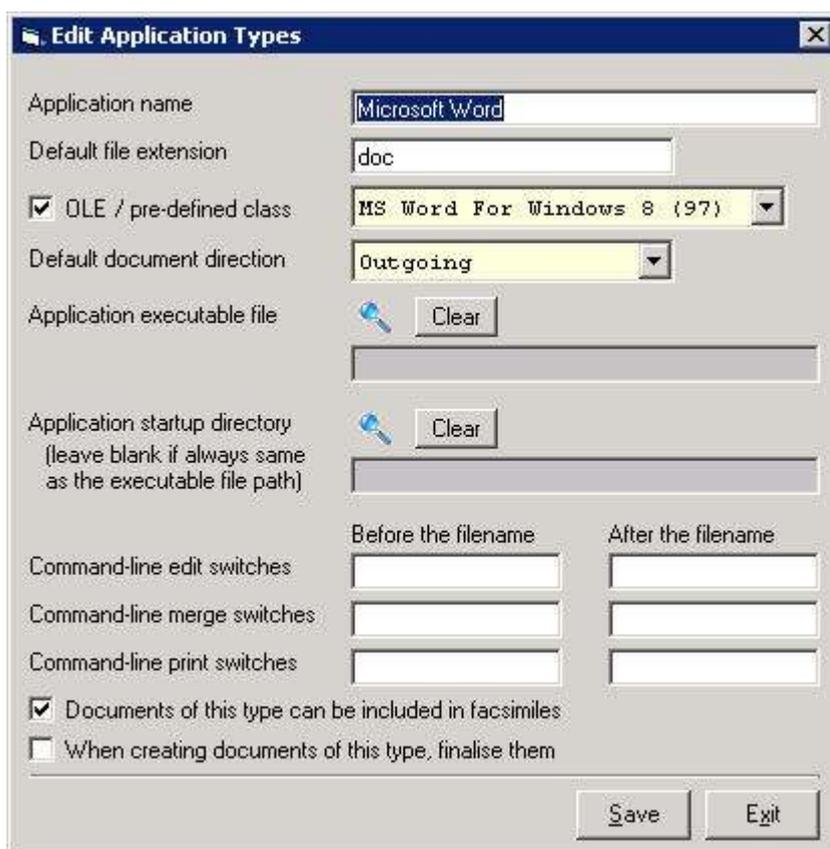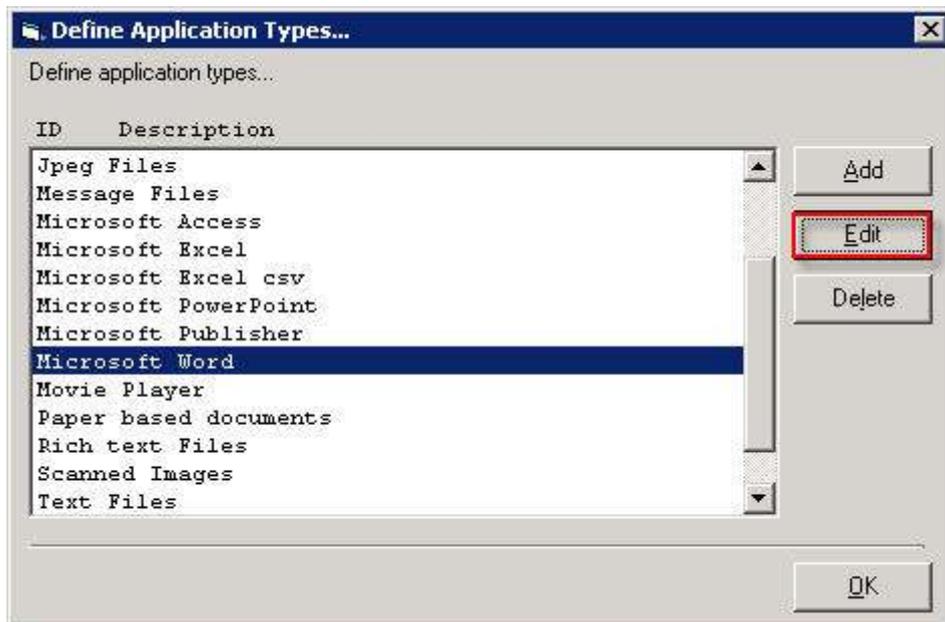
Registering & editing application types with ST Synergy – note the extensive desktop application support.

ST Synergy currently supports almost any application type from ASCII files to CAD documents and Beyond.

Summary of other ST Synergy housekeeping segments

Where appropriate, ST Synergy housekeeping functions are based on our unique two-tier system that allows an almost unlimited degree of flexibility in defining the structure of your ST Synergy database. A number of other housekeeping (setup) options are described below in brief:

Job/Workflow definition

ST Synergy delivers an extremely powerful workflow management tool that allows administrators to manage jobs/tasks within the enterprise. Administrators can define job types and their corresponding task types and also any questions and answers that may be required, thereby leading to a logically ordered job management system.

ST Synergy also allows users to track and record the progress and allocation of enterprise workflow – again this task is made easier by the 'natural language' style of job definition.

The benefits of proper job task/project definition include users being able to instantly view current job allocation and progress. In situations where there are large numbers of jobs in progress at any given time, the task of locating a customer's job on-line and provide accurate progress information is made much easier by proper job hierarchy definition.

ST Synergy also allows administrators to set up job-related logical rows and columns that may be used to record information about specific jobs. For example, in an engineering environment, the organisation may need to track 'stress test' results of supporting beams on certain types of Jobs. Using ST Synergy, administrators can accommodate data capture requirements for these test results on Jobs using date fields, logical (true/false) flags, text fields, numeric fields and even memo fields.
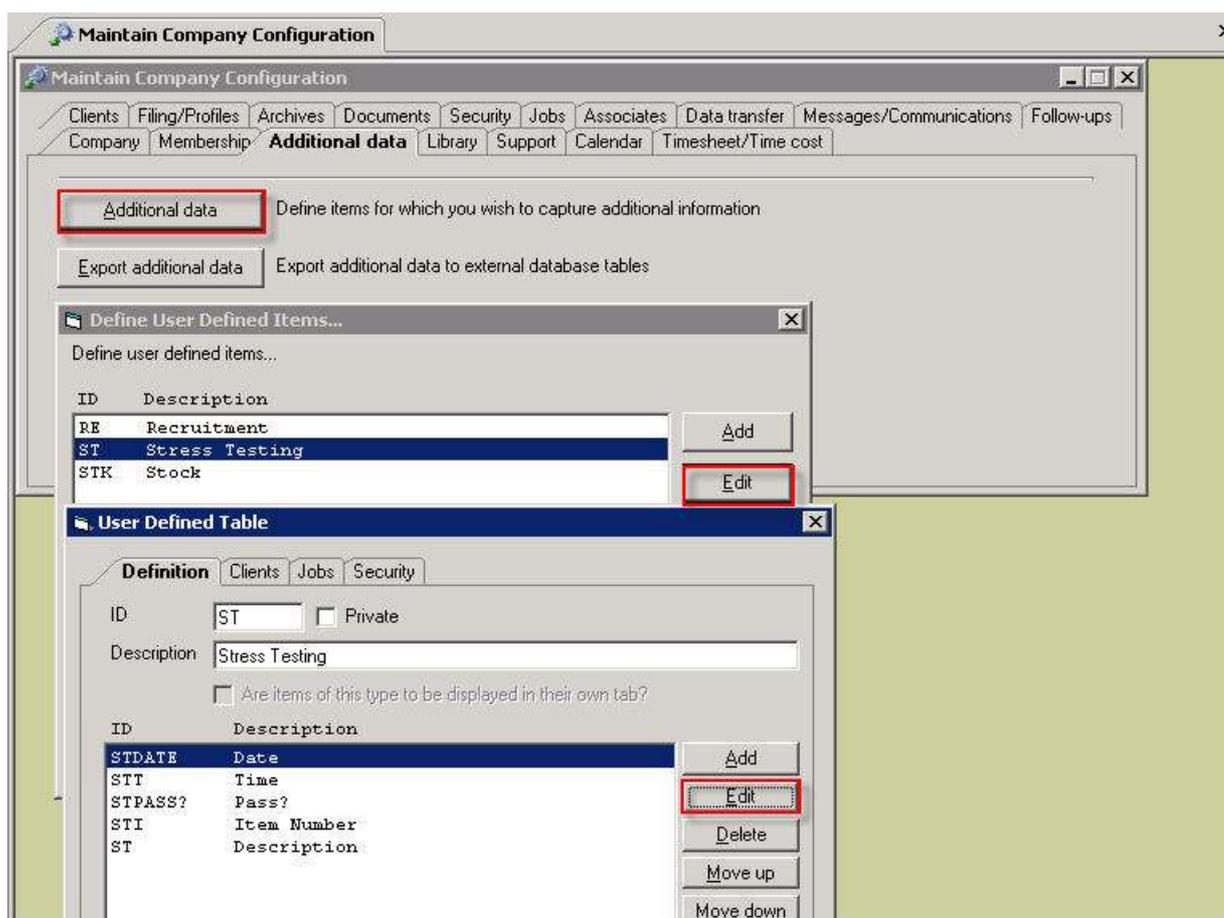
Editing the date field(column) on a User Defined Table using ST Synergy's Housekeeping (Company Configuration) Module. Note the support for different types of fields such as text, date, logical, numeric etc. In the example above, the ST Synergy Administrator has created a series of columns that relate to stress management tests on engineering beams. Users will be able to capture and track these test results against the appropriate Jobs.

Security

The security tab of the Housekeeping module deals with system security settings that protect your database from uninvited access. Additionally, administrators can also use the Housekeeping module to set user privileges with regards to viewing certain information and accessing certain application functions. E.g. Which users can add new Customer records to the database.

Many of the extensive range of security controls can also be applied using group policy, so at some point the management team and system administrators typically decide on the groups of people that will have access to certain functions and data in the system.

Important dates / follow-ups / anniversaries

ST Synergy allows system administrators to define different types of follow-ups(reminders) for use with enterprise clients and/or jobs. From the user's perspective these follow-ups are also known as "important dates, follow-ups and anniversaries".

Using the housekeeping module, administrators define the required different types of follow-ups. For example, you can have different follow-up types for performance review dates, warranty expiration dates, anniversary reminders etc.

Once defined, follow-up types are then available to users for attaching to clients and/or jobs using the Work Centre, the *Client Control Centre* or the Matter Control Centre. and users may optionally nominate a staff member or Team that will be assigned responsibility for following up on the event.
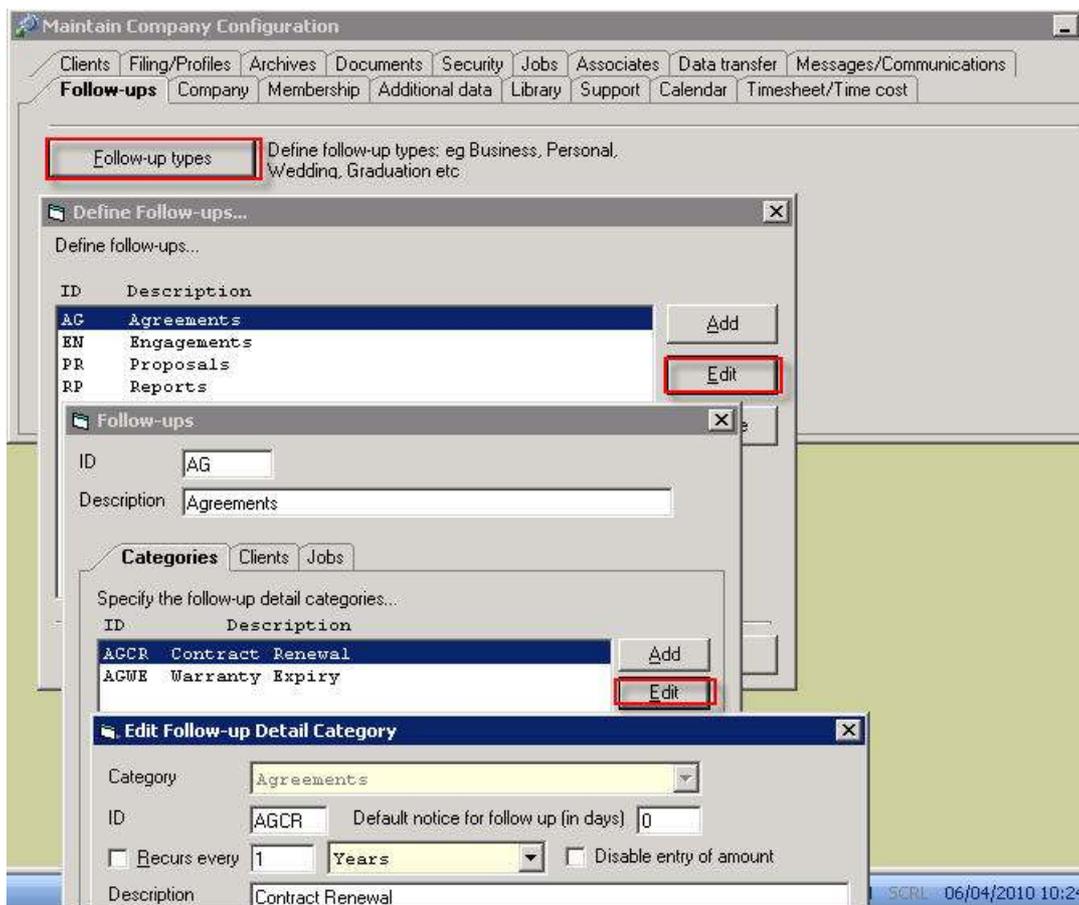

Editing Follow-up types at housekeeping – in the example above the administrator has created follow-up types for warranty tracking as well contract renewal. Using the same 'two-tier' model, ST Synergy allows you to track almost any significant date, whether it be annual, monthly, week'y, daily or ad-hoc.

Timesheet / Timecost

This tab of the Housekeeping(Company Configuration) module supports the configuration of all manner of variables required to provide a customised Timesheet /Time cost system suitable for your organisation,

Service codes and mapping assist in the support for integration with your Accounting system.
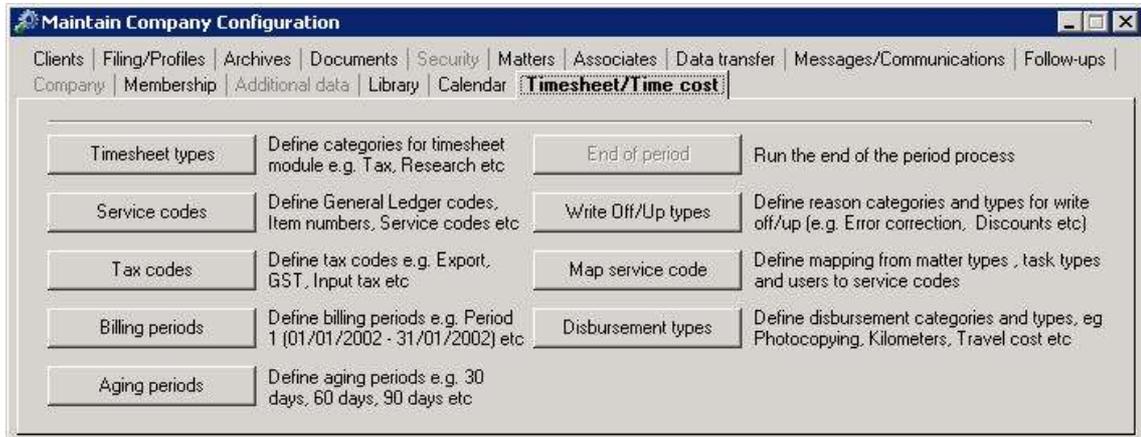
Screen shot of the Timesheet/ Timecost Tab within Housekeeping.

Summary

ST Synergy delivers customisation features that enable consistency of data capture through system controlled rules and procedures. The ST Synergy housekeeping module allows administrators to define, control and manage their organisation's system and data capture requirements with complete ease and flexibility.

The table below outlines a cross section of the ST Synergy *Housekeeping Module*– with major segments and tabs defined for ease of reference.

Component	Use	Typical application
Client profiling	Setting demographic information for customers, suppliers and other entities Allows the enterprise to assign profiles to customers – leading to greater marketing/customer management flexibility.	Marketing/Customer/Vendor relationships
Associates	Defining multi-dimensional relationships between clients(entities). Enables an organisation to define how their client's relate to other clients in their database.	Marketing/Customer/Vendor relationships
Contacts management	Creating contact types and subjects for users to track contacts history for clients. Creating contact subjects using the housekeeping module leads to improved data capture & retrieval by users.	Contacts management
Referrals	Defining referral sources (Advertising, Yellow Pages etc) – allowing for the tracking of how clients were attracted to the organisation.	Tracking marketing efficiency
Archives	Defining and maintaining the organisations archive segments – controlling physical records management. This segment may be used for example to track the location of paper-based drawings, reports, accounting records etc.	Records management
Documents	Defining the enterprise document management model – as well as tracking document server repositories and registering desktop applications for seamless integration to ST Synergy.	Document management
Security	Defining the enterprise security model – setting and controlling user access to documents, application segments etc	Security management
Matters (aka Jobs)	Defining the organisation's workflow/project/task model including questions and answers and hold reasons. Administrators can also define any number of logical tables and columns that are used to capture and track data about Clients or Jobs. Also, performance parameters such as budget information, and milestone percentages may be pre-configured and aligned with jobs via the ST Synergy housekeeping module resulting in complete enterprise workflow tracking and management.	Workflow management
Follow-ups	Defining important business/personal anniversaries (warranty dates etc).	Managing renewal dates for contracts/warranties – customer management.
Timesheet / Time cost	Allows administrators to define the components that support an integrated timesheeting and billing system	Time/Billing Management

Table. Main Cross section of ST Synergy Housekeeping Module