

# RedSky IT User Group Conference

Thursday 18<sup>th</sup> March 2010



## AGENDA

08:30

### Partner Exhibition and Registration Opens

A selection of RedSky IT partners will exhibit their solutions and services throughout the conference.

**Location:** Rotunda

**Exhibitors:** **ReadSoft** – ReadSoft is the established leader in Document Capture. Their software solutions enable companies to automate document processes such as data entry, document classification, information matching against back office systems, document workflows, e-invoicing etc. The results are faster and less expensive document processing and increased control.  
**Albany Software** - Albany offers a unique range of powerful integrated payment solutions that are approved by BACS for both the traditional 3-day model and the new Faster Payments model.  
**Business Stationery Direct** – Business Stationery Direct is the leading provider of specialist printing and stationery including pressure seal payslips.  
**Leasemaster** – Leasemaster provides technology funding including Total System Funding, Software Only Finance, and Flexible Exchange Agreements.  
**Shoosmiths** – Voted “Corporate Law Firm of the Year” in 2009 Shoosmiths is one of the UK’s largest law firms providing clients, including a wide range of national, commercial, developers, contractors, subcontractors, and professionals with quick, concise, and efficient legal and commercial advice.  
**CRASH** - CRASH is the construction and property industries’ charity for homeless people. They work with homeless charities and concentrate on improving and refurbishing hostels, day centres, training centres, and move on accommodation. Their aim is to provide homeless people with a home from which they can begin to reconnect with normal society. RedSky IT is proud to be a patron of CRASH.  
**RedSky IT** – Throughout the day RedSky IT consultants and sales staff will be in the exhibition area demonstrating a range of products.

09:30

### User Group Welcome and 12-month Review

**Location:** London Suite

**Speakers:** Mike Aspinwall and Jim McFarlane

**Overview:** Opening address from RedSky IT’s Managing Director and Explorer Software’s President and CEO.

10:00

### Shoosmiths – Payments in the Construction industry

**Location:** London Suite

**Speaker:** Simon Wain (Associate)

**Overview:** Simon will talk about effective Cash flow management in the construction industry. He will look at the Statutory provisions (Housing Grants, Construction, and Regeneration Act 1996) - and how these are likely to change. He will also consider other ways to protect your position (or reassure contractors) including:

- Project Bank Accounts
- Escrow Agreements
- Retention of Title
- Payment up front for materials
- Stage payments.

10:45

### Coffee and Exhibition

**Location:** Rotunda

	London Suite	Conference Room 6
11:15	<p><b>CIS / PAYE Briefing</b></p> <p><b>Location:</b> London Suite</p> <p><b>Speaker:</b> Liz Bridge (secretary of the Joint Taxation Committee / former Director of Taxation for the Construction Confederation)</p> <p><b>Overview:</b> Liz Bridge will talk about the Consultative Document issued in the summer of 2009 which proposed compulsory PAYE for building industry workers. She will discuss what has become of the ideas for new legislation that it raised.</p> <p>She will consider whether it is likely that a new government will try to enact legislation that forces many more labour only subcontractors into PAYE and what protections the industry will require to ensure that genuinely self employed sole traders are not caught in the net. Finally, Liz will consider what would these changes mean for the CIS scheme?</p>	<p><b>Web Timesheet and Expenses</b></p> <p><b>Location:</b> Conference Room 6</p> <p><b>Speaker:</b> Graham Long</p> <p><b>Overview:</b> How much does it cost you to administer the cost information you receive from your employees? Would you like that information faster and cheaper? Would it let you invoice earlier and more accurately? Would users like one place to go to provide everything you need rather than using distinct applications, paper based forms, and spreadsheets?</p> <p>This workshop covers the available options that can deliver massive benefits to your business.</p>
12:00	<p><b>User Group 'closed' Session</b></p> <p><b>Location:</b> Conference Room 7</p> <p><b>Chairperson:</b> Colin Murdoch</p> <p><b>Overview:</b> The User Group is independently run and this session, which is traditionally open to User Group members only, allows delegates to discuss User Group affairs and plan future events. Non-members are welcome and encouraged to attend as they will gain fuller understanding of the aims and goals of the User Group.</p>	
12:30	<p><b>Buffet Lunch and Exhibition</b></p> <p><b>Location:</b> Rotunda</p>	

Afternoon breakout sessions run in parallel in five rooms; Mayfair, Westminster, Piccadilly, Conference Room 6, and Conference Room 7.

Delegates can pick and mix which sessions to attend.

Scroll down for further information.

## MAYFAIR

14:00

**The Power To Customise**

**Location:** Mayfair  
**Speaker:** Ian Saville (CA Blackwell)  
**Overview:** Ian has presented at previous user groups to demonstrate how CA Blackwell has taken the core Summit solution and customised and extended it to meet the specific requirements of their business. Ian will revisit this customisation using the Form Designer showing how additional fields or whole systems can be created, how custom validation can be introduced, and how analysis tags can be attached to programs.

Ian will also show how the backdrop page of the Desktop Client can be customised and used for broadcasting system messages, providing links to their Intranet, or simply to show your own company logo.

14:45

**Disaster Recovery Hosting**

**Location:** Mayfair  
**Speaker:** Simon Hague  
**Overview:** Every business and organisation can experience a serious incident such as a flood, fire, or hardware failure that can prevent it from continuing normal operations. Many customers rely heavily on their RedSky IT solution for critical day to day processing such as payments and payroll. How would your company cope if they did not have access to your RedSky IT solution for an extended period of time?

Following the hugely successful launch of the Hosting Service last year RedSky IT will launch the new Disaster Recovery Hosting Service available to all customers.

15:30

**On Time, Every Time... is your payment processing efficient & cost-effective?**

**Location:** Mayfair  
**Speaker:** Matt Tully (Albany)  
**Overview:** Are you enjoying significant cost reductions, improved credit control and better insight into margins and profitability? If not, Albany Software considers ways to transform and streamline your payments and collections process.

This session aims to help you:

- Identify the most intelligent & efficient fund transfer options available.
- Get-to-grips with the new Faster Payments Service.
- Learn about Direct Debits in a B2B environment.
- Understand how transferring funds in near-real-time can ease back office admin
- Discover the positive impacts and benefits to your business.

Achieve optimum efficiency... on time, every time!

## WESTMINSTER

**ReadSoft DOCUMENTS**

**Location:** Westminster  
**Speaker:** Christine Whyte (ReadSoft)  
**Overview:** ReadSoft DOCUMENTS Platform enables inbound information to be captured, classified, indexed and routed to the appropriate department or personnel – reducing or eliminating manual processes.

The ReadSoft/RedSkyIT solution manages a wide range of documents including:

- Structured (such as application forms)
- Semi-structured (sub contract documents, purchase invoices)
- Unstructured (such as letters and contracts)

...as well as email and other electronic data streams, such as XML.

Inbound content can then be automatically managed and routed to trigger a wide range of business processes.

See how typical documents associated with a contract or project can be efficiently captured, analysed and retrieved when required, with a combination of DOCUMENTS AND INFORMATE.

**Plant Management**

**Location:** Westminster  
**Speaker:** Ishbel Wise  
**Overview:** The ordering, on/off hires, timesheets, transfers, consumables, and delivery charges of owned or hired in plant often requires externally generated spreadsheets supporting plant charges or a weekly tranche of plant on site returns.

RedSky IT's Plant Management provides a series of screens to help manage day to day plant operations. System generated accruals save processing time by not having to create and post journals manually and the project team can see the current position of plant costs on the contract in real time rather than having to rely on offline spreadsheets.

This session will demonstrate how the Plant Management solution can be used to:

- Implement strong internal control of all plant resource and have visibility of company assets using a tracking screen.
- Reduce the administrative burden for the ordering, on /off hires, accrual and charging for daily or weekly plant and time sheets.
- Clearly show plant costs against contracts.

**e-Trading**

**Location:** Westminster  
**Speaker:** Graham Long  
**Overview:** Businesses spend a huge amount of money each year administering the Purchasing Process. This workshop will address those issues and examine how you can remove a large amount of overhead through the use of e-Trading.

This will be an interactive session as we would welcome feedback on the way your business manages the process.

**CONFERENCE ROOM 6**

**AEC Web Applications – Part 1**

**Location:** Conference Room 6  
**Speaker:** Graham Long  
**Overview:** How much time do you spend in your business, passing information between operational and financial staff?  
 Are users frustrated because of processing delays?  
 How many processes become iterative with the flow of information back and forth from Finance?  
 Informate enables users to do more of the job themselves whilst allowing the business to retain control. It's faster, it's cheaper, and it's more accurate. How much time and money could you save?  
 RedSky IT continues to invest and enhance the web applications for the AEC market. In the first part of a two part breakout session we will look at Business Development and Opportunity Management, and Job and Workstage setup, understanding how these tools can remove administrative overheads from your business.

**AEC Web Applications – Part 2**

**Location:** Conference Room 6  
**Speaker:** Graham Long  
**Overview:** Part 2 of the AEC Web Application breakout sessions this time focussing on the entire project lifecycle from Income Forecasts to Cash.  
 This session will look in detail at:

- Fee Forecasting
- Posting Time, Expenses, Purchase Orders, Percentage Completes
- Fee Note Posting
- Write Offs and Credit Control

**ProgressionAEC Functionality Forum**

**Location:** Conference Room 6  
**Speaker:** Rob Mullins/Sonia Williams  
**Overview:** An interactive forum session aimed at users of the Progression solution.  
 Ahead of the conference Rob will be polling customers to compile a list of topics and areas that will be covered in the session. Customers will be invited to submit any areas of progression that they would like to look at in more detail.

**PICCADILLY**

**Web Enquiries**

**Location:** Piccadilly  
**Speaker:** Steve Allen  
**Overview:** Knowledge is power, so empower everyone within your business by providing information and data pertinent to their functional requirements in an easily accessible format and within the familiar medium of a web browser.  
 The majority of requirements can be easily built without in-depth programming knowledge and can be easily tweaked to stay relevant to your business processes.  
 This session will show you:

- In-line (grid) editing.
- True relational database backend.
- Sophisticated calculations.
- Dynamic filtering and sorting.
- Export to Excel.

**Business Alerting**

**Location:** Piccadilly  
**Speaker:** Phil Kent  
**Overview:** Business Alerting is a powerful management tool that can send email notifications to your business about changes to key data as they happen.  
 You are able to define your own business rules to drive the information you wish to disseminate to the business. These rules can then be scheduled to be run and checked as often as you require and the system will generate alerts to your users by e-mail.  
 As these rules are implemented at the database level then the exact nature of the rules and to whom the alerts are delivered are completely under your control.  
 This session will provide an insight into how alerting can be deployed using a couple of examples.  
 Some ways business rules can be used to provide alerts;

- Job creation sends alert to Finance Manager.
- Costs actual has hit 75% of budget to Project Man.
- Timesheet entered against job alerts Project Man.
- Planned Plant off hire date exceeded on contract alerts.
- Debtor management, outstanding payment due date exceeded by 'n' days alerts Finance manager.
- Outstanding payment due date within 'n' days sends alert to Credit control.
- Service management, job is within 'n' hours of target date/time for next action sends alert to job owner.

**Crystal Reporting**

**Location:** Piccadilly  
**Speaker:** Dave Shaw (Neath&Port Talbot Council)  
**Overview:** Crystal Reports is one of the most popular reporting tools on the market. It allows users to directly access the data within complex databases and can create a powerful environment for information analysis - without the need for IT staff resources.  
 Neath Port Talbot Council has made valuable use of this in recent years and Dave's demonstration will show how to set up simple detailed transaction reports and summary views with drill down capability for live RedSky IT data.

	<p><b><u>Introduction to Service Management</u></b></p> <p><b>Location:</b> Conference Room 7  <b>Speaker:</b> Gary Marshall  <b>Overview:</b> RedSky IT's Service Management solution provides flexible control and monitoring of High Volume, Low Value jobs.</p> <p>The Service Management module allows customers to create work flows for a variety of contracts they may be involved in, which means each of the processes can be tailored to suit the specific terms of the contract so management, reporting, and KPI data can be produced with ease. Reactive and Planned maintenance works can be controlled through to final billing linking seamlessly with the Contract Ledger and associated processes.</p> <p>Benefits/Efficiencies:</p> <ul style="list-style-type: none"> <li>Tracking of Jobs from Call receipt through to final billing.</li> <li>KPI Monitoring against Key Dates/Time.</li> <li>Invoice Generation - SoR, Cost Plus, Time and Materials.</li> <li>Engineers Diary.</li> <li>Planned Maintenance and Asset Servicing Database.</li> </ul>	<p><b><u>Handheld Devices</u></b></p> <p><b>Location:</b> Conference Room 7  <b>Speaker:</b> Gary Marshall  <b>Overview:</b> RedSky IT's Mobile solution, combined with Service Management provides a highly efficient solution for sending and receiving job details to your Mobile Work force.</p> <p>The solution does not require dedicated servers, but instead uses your normal email service, allowing smaller organisations to break free of the costly complexity of previous generation mobile software. The efficiencies of mobile data capture are no longer available only to those organisations with large workforces, who can justify the infrastructure outlay.</p> <p>This also allows you to consider extending the coverage to subcontractors, who's only requirement is to have a PDA and Email address.</p> <p>Benefits/Efficiencies:</p> <ul style="list-style-type: none"> <li>Improved Response Times.</li> <li>Availability of Real Time Job Status details for you and your clients.</li> <li>Fully user/client definable screens.</li> <li>Request that Operatives Asses and completed risk Assessment prior to commencing job.</li> <li>Capture Real Time KPI's (On and Off Site Times, Completion Times).</li> <li>Capture Photographs and Electronic signatures which are then attached to the Job in Summit.</li> <li>Reduction in Paperwork – Materials/Stock used and SOR codes all recorded electronically.</li> <li>Same day invoicing, as no longer waiting for Paperwork to be returned.</li> </ul>	<p><b><u>Dashboarding</u></b></p> <p><b>Location:</b> Conference Room 7  <b>Speaker:</b> Gary Marshall  <b>Overview:</b> Dashboards provides graphical enhancement to all of your management data, not limited to data from your RedSky IT solution this dashboard could incorporate data from other systems or even external sites.</p> <p>Role based dashboards bring the data YOU are interested in to you rather than the conventional method of running reports or making enquiries to find the information you need. Dashboards can be configured to suit your preferences, choose the layout, how you want the information presented (Chart, Graph, or Tables) allowing you to have a view of the business from your browser.</p>
<p><b>16:00</b></p>	<p><b>Breakout Sessions End</b></p>		
<p><b>16:10 to 16:40</b></p>	<p><b>Summit Year-End Workshop</b></p> <p><b>Location:</b> Mayfair  <b>Speaker:</b> Errol Dehoedt  <b>Overview:</b> PAYE processing for 2009/10 coincides with Easter the first time since 1999. Where Holiday Weeks directly follow Easter a defined procedure will need to be followed. This session will provide users with a walk through of the PAYE / Easter Holiday Weeks process.</p>		
<p><b>17:00</b></p>	<p><b>User Conference and Exhibition Close</b></p>		

- Customers will be able to book one-to-one support surgeries with members of the RedSky IT Helpdesk to discuss any issue that is specific to their business.
- Customers will also be able to book informal consultancy sessions with member of the Consultancy team.