



*Summit 5000, an Operational Management System from RedSky IT, empowering your Operational staff while maintaining strong financial control and providing strategic financial information. Summit 5000 is designed to complement your existing financial back office system and can be deployed on a project by project basis.*

**Financials** **General Ledger** Overview

**General Ledger** is a module of Summit 5000 Financials and in a tight partnership with the Contract Ledger forms a cornerstone to our back office suite providing the framework for reporting both corporate and business unit performance and maintaining good accounting standards.

**Streamlined Reporting**

With dynamic integrated live links from the General Ledger to Microsoft Excel or the use of other reporting software tools, both Financial and Management reporting is on-line timely and accurate. The strictest reporting deadlines can be met and reliance on accurate information is assured. The need for additional manual intervention such as keying data is avoided.

**Financial Management**

More valuable time is saved as a direct result of streamlining your management reporting. This claws back time in the financial cycle for financial analysis and management decision making rather than production of information; so technology is working for the business.

**Financial Security and Control**

Strict controls exist to ensure financial information has complete integrity and although only authorised users have access to relevant information, users can easily create their own specific profiles. Non financial users who need access to there area of responsibility have screens that they can understand and are relevant to them.

**A flexible tool that supports the business**

The General Ledger supports and can report across most combinations of business structure including complex and diverse organisations, across multiple sectors and currencies and consolidating at different levels. As the business develops the general ledger will support changes to corporate structure and hence can evolve with the business.



*Contract Ledger is a module of Summit 5000 Financials that provides a window into the operational performance of contracts in the business and provides the detailed analysis of cost and value.*

**Contract Performance**

*A concentric view of contract performance to help improve contract management.*

In "Open Book" style contracts, both the project team and the client have a single snap shot view of the financial and cash position of their contract.

From here it's just a single keystroke to see:-

- Any Contract related documentation, letters, drawing instructions.
- Spend Analysis by:
  - traditional main cost groups,
  - subcontractor
  - or any resource activity or operation
- Full drill back to the source document

**Operation Focus**

*Communication of cost and value in a language that the project teams understand.*

With simple yet powerful format and filtering functionality, presentation and communication of key information can be tailored to specific users in the format they need and not one that is dictated by traditional financial solutions.

**Embracing Technology to enhance communication and drive down site costs**

By offering project teams easy access to their contracts via the RedSky IT web browser communication to site is greatly enhanced. The need for dedicated client software on each site is avoided and access to key information any time on-line is available simply using the Internet.

**Emphasis on Streamlined Reporting**

With dynamic integrated live links to Microsoft Excel via the powerful Crystal report writer, CVR reports can be produced online automatically. Disparate spreadsheets and isolated databases across the business are thus avoided.

**Focus on control of project costs**

A strong emphasis on managing projects by monitoring and controlling actual spend against budget and providing a basis for revising cost and value forecasting.



Financials **Accounts Payable** Overview

The **Accounts Payable modules** of Summit 5000 Financials provide the control over cash outflow from the business.

**Purchase Ledger**

**Streamlining the payables process**

Utilising process workflow, payables are managed more efficiently through the payables stages using automatic routes and business rules.

Efficiencies in the process are derived from:-

**Centralising** the Purchase function which reduces internal administration costs and can improve process efficiency

**Intelligent email** notification system - all payables communication throughout the business is directed to relevant people in a timely manner and so avoiding delays in authorisations.

**Electronic invoice and order processing** stream lines processing, and helps avoid payment holds and queries.

**Web browser** access offers supply chain partners information concerning their accounts, which will free your resources reducing telephone queries so that you can concentrate on adding value in the process.

**Maintaining control**

Strong financial controls exist to prevent duplication and unauthorised payments being made.

**Managing the paper flow**

Image processing can drastically reduce the volumes of paper and hence make space and cost savings. An image will also provide a greater degree of transparency of the transaction.

The result is faster operations, more accurate information, lower costs and a better level of service.



**Subcontractor Ledger**

**Managing Subcontractor Performance**

From order, valuation to payment each element of the subcontractor process can be monitored. Across all contracts their stage of completion and financial performance is clearly visible to support the task of controlling cost and assist in identifying and highlighting problems.

**Evaluating Subcontractor performance**

To support the selection of a subcontractor, performance scores can be recorded to offer a subjective view of the subcontractor against defined criteria and measured against accepted standards.

**Managing the Legislative requirements of CIS**

All aspects of the CIS process are managed in a simple and straight-forward format with the emphasis on reducing the administrative burden, yet ensuring that strict controls are maintained and that the business operates in accordance to the legislation.

**Financial Controls**

Using process workflow the stages of the subcontractor payment are controlled and together with appropriate user profiles and security, segregation of duties is achieved; which means that only properly authorised invoices and certificates are paid.



The **Contract Sales and Sales Invoicing modules** of Summit 5000 Financials provide the control and mechanism of managing cash inflow into the business.

### Contract Sales

#### Valuation and Billing

Manages and integrates the valuation and billing process so that external valuation is converted into an application for payment and matched to the client certificate. Incorporating internal valuation it then provides the basis of reconciliation of turnover and margin and supports adjustments to financial accounts. Specific client requirements including document presentation, content and VAT points are configurable and reflected in accordance with both the contract and fiscal requirements.

#### Integration

Fully integrated into the other ledgers for posting of revenue to the General Ledger the Contract Ledger and also into the Cash Management system so providing cash inflow forecast.

#### Retention

Manages client retention and accommodates phased completion.

### Sales Invoicing

#### Invoice, Application and Credit Notes

Produces any invoice layout required by the client automatically without the need for separate manual processes.

#### Debtor Management

Client debt is managed by reporting invoice due dates against the contract terms and producing aged analysis, statements, and where necessary the credit control action letters automatically. Further risk is avoided with active credit limits and credit control notes held against the client.



## Financials **Cash Management** Overview

**Cash Management** is a module of Summit 5000 Financials that provides the control over the cash flow and treasury management of the business. Cash Management supports cash forecasting across the business together with providing strong treasury management. Company wide it focuses the message that cash is critical to successful trading.

### Contract Cash Flow

Focus the project team on cash awareness so that the cash position of the contract is presented to site staff within the normal contract enquiry view.

#### Forecasting

Forecasting the short and longer term contract position and business cash position and reflecting this back to the company bank accounts means that financial risk and exposure are highlighted at an early stage.

#### Performance monitoring

Identifying where a contract is going wrong is likely to be highlighted at an early stage when cash flow forecasting is incorporated into the contract review process.

#### Cash Flow Reporting

Using dynamic live links to source ledgers and direct output into Microsoft Excel provide timely and accurate feeds into the business cash flow models and exception reports.

#### Good Housekeeping

By ensuring that settlement discounts are taken from suppliers and that surveyors are reminded when client monies are due.

## Treasury Management

#### Saving administration time and costs

Supporting timely and fully auditable automatic bank reconciliation. Managing payments centrally across departments and the entire business.

#### Supporting strong financial internal controls

By managing payments centrally and hence ensuring proper segregation of duties within the business.



## Operational **Planning** Overview

The **Planning module** allows you to utilize existing estimating documentation and build up a true picture of how the work will proceed. The build up can be done at what ever detail is required to establish a set of cost heads and associated budgets that the contract team will report on throughout the project.

### Rework Estimate

The process and tools used to enable your organisation to win work are a critical. However once the work is won these systems often lack the ability to support the contract management, buying and QS functions that are vital to deliver on time and to budget. In recognition of this the planning module allows the **Import of estimates** and associated resource libraries and budgets from third party systems including Conquest, Estimation and Kestrel.

**Post tender adjustment** can be made using a full suite of Estimating functions including:

- Libraries, Bill Pricing and Resource Comparison.
- Work with multiple estimate files and copy existing estimate files to create revisions.
- Maintain central resource libraries for LMPS
- Trade tag and Time code the estimate
- Amend build up of items
- Add new items
- View and print entire bills, sections, pages

Generate mini bills for **Material, Plant and Subcontractor pricing enquiries**, manage quotes and perform comparisons.

### Variations

Manage Variation Orders. Log VO by type or source. **Approval workflow** can be defined for sign off and inclusion in Contract budget

### Scheduling

Create timetabled buy lists from tagged bill

Export time tags and associated resources to project scheduling software including Microsoft Project & Primavera. Import scheduled time tags form project software.

Raise Material Requisitions/ Orders by time tag or resource type

### Budgeting

Once the plan is complete and a set of budgets agreed the estimate document can be linked to a contract. As the budgets change during the project they can be reflected on the contract analysis at anytime. **Multiple budget sets** can be held allowing for an original and re-forecasts to be available for comparison. These can be **phased** over the periods of the projects.

The **contract** is used to manage the collation of **commitment, cost** and comparison to budget throughout the remainder of the project's life. A **cost analysis** can be defined that is **contract specific**, based on a **contract type** or using a **system** set of **resource and activity** analysis.



## Operational Valuations Overview

The **Valuation module** allows you to value work done to assist with Client Applications, Subcontractor Applications for Payment and to provide the contract analysis with a true reflection of performance, Internal value vs. Actual. This module reduces the use of spreadsheets by providing a means of producing and managing valuation documentation against the contract.

### A common set of valuation tools

**Quantities** can be entered as a **percentage** of the total, entered **directly** or can be **re-measured** using traditional dimension sheets or "from-spreadsheet" calculations. Items can be valued individually or as a range to allow for fast entry.

Quick valuations can be produced to form the basis of a more detailed valuation by valuing pages, section, bills or the total. Time Tags can also be used to value work.

Final Accounts can be automatically updated with variations included and approved within the estimate. **Variations** can be priced from first principles or using pre built-up rates. Whether these are included within the valuation depends on a set of user definable **VO workflow approval** controls.

One set of calculations entered against any of the External, Internal or Subcontractor valuations can be copied to the other types as appropriate, thus avoiding duplication of entry.

### Internal Valuations

Internal valuation rates can be changed to reflect actual resources used thereby producing anticipated buying gains. These can be reflected in a reforecast budget against the contract analysis. As all contract analysis codes are in place, budgets can be automatically calculated from the Internal valuation, which can then be viewed along side actual costs to provide **the basis for cost/value reconciliation**.

### Subcontractor Valuations

Subcontractor valuations can be used as the detailed build up for payment certificates and can be fed in to the **Subcontractor Workflow**. This provides the QS with the ability to create and approve a subcontractor valuation certificate for payment by Finance. The QS also has the ability to enquire on the progress of a payment by Finance.

### External Valuations

**Materials on site** can be recorded.

A detailed valuation can be made and reported to substantiate **Applications for Payment** that can be generated by the system. Crystal reports can be used to present the client with their preferred format for a claim.



## Operational Procurement Overview

The **Procurement module** of Summit 5000 Operational supports all aspects of the procurement function from requisition management, managing and selecting preferred vendors through planning and scheduling to the raising of orders. An efficient Procurement process empowers the business to focus on effective procurement management rather than inefficient manual and paper processing.

### Quotations and Comparison

A seamless flow of information from and to the supplier is provided using desktop integration. Successful tenders can be marked up to provide mini bills for pricing enquiries, pricing can be feed back against the tender to build up comparable prices for resourcing it.

### Price Agreements and Rebates

Managing partnering discounts requires the need for ongoing price and turnover checking to establish spend and correct order price. Price agreements can be created specifically for a contract or region, this supports and builds on trade relations and ensures that costs are known, discounts can be agreed and business rebates can be managed in advance.

Agreements are a fundamental part of managing the procurement framework allowing the business to empower its people to use the systems effectively, and build partnerships.

### Resource buying and scheduling

An automated process that is driven by marking up an estimate then planning and scheduling when resource is required to be ordered. Graphical presentation and modelling of the plan can assist the buyer in determining when materials are required on site yet have the flexibility to reflect actual progress and allow for rescheduling. Procurement integrates to Project Management Planning software tools including Microsoft Project, Primavera and PowerProject.

### Requisition Management

Providing an effective procurement process relies on beginning the process in a managed way. Allow site staff to requisition resource in a controlled environment. Agreements and authority controls mean the process is simple yet accountable. With electronic order production paper processing is minimised and timely resource ordering achieved.

### Vendor Management

Provides a comprehensive information source easily maintained including vendor performance scoring and assessment against prices and work which feeds into the decision making process for vendor selection. Vendors that meet the necessary criteria are offered the opportunity to quote for specific resource requirement or for evaluation for agreements and partnership.

**Sharing information** and embracing technology by opening up the procurement market using the RedSky IT Web Client across the Internet means that suppliers can maintain their own prices, project teams can raise requisitions, purchase orders and check order status.



## Operational Costing Overview

*Costing in Summit 5000 allows comprehensive capture of costs at source where operational staff are empowered to manage and process site related transactions.*

### Empower site staff

By empowering site staff to manage their workflow means costs are captured at source leading to the information being more timely and accurate. Workflow is streamlined following business processes and reducing the need for site staff to complete paperwork to be sent to the office, which causes duplication and delay and possible error or omission. The back office is freed up to perform financial analysis rather than re-entering documentation which is often out of date. The screen is designed to suit the site user in a format they are familiar with, in their language and specific to their requirements, it is not being dictated by a finance perspective.

### Local Ordering, GRN and Invoice Matching

Empowering site to raise their own Purchase Orders against preferred suppliers and price agreements means a controlled buying framework exists and creates a level of autonomy. This allows a faster purchasing flow, committed cost onto the contract and frees up buyers to concentrate on procurement management rather than order production.

The receipt of materials onto site is directly recorded onto the contract by the site users, giving rise to timely capture of costs at source rather than waiting for head office to receive the forwarded GRN documentation, which is time consuming and inconsistent.

By having procurement controls in place with preferred suppliers, agreed prices and levels of authority, the invoice matching is a streamlined and controlled process which can be empowered to site users to complete the cost cycle.

### Time Recording

Capturing time for contract related staff at source provides the business with timely and accurate cost information vital to support the control and recovery. Managing preliminaries where a substantial element is represented by the project team and contract management is essential to controlling the contract margin and to substantiate recovery from the client. Time and rates processed on the weekly timesheet update the contract which also feeds the payroll system so back office staff are freed up to manage and control finances rather than key in historic data.

### Managing Plant

All day to day operational processes relating to managing plant can be easily performed within a single plant tracking screen. These processes include being able to check what is recorded on site, book plant onto the site, off hire and return back to the supplier with an off hire note or back to the yard, transfer to another site to entering plant usage onto the timesheet.

Accruals and charges can be made based on the above activity providing a regular update of cost on to the contract. Accruals can be matched by supplier/ subcontractor invoices once received.



**Operational Monitoring Overview**

*Monitoring presents management at all levels within your organisation with timely and accurate information in the right format which is needed to manage contract performance.*

**Contract Enquiry and Reporting**

Managing contracts requires sophisticated yet easy access for the site based project team to relevant, timely, accurate and reliable information so that corrective action can be taken to avoid potential problems.

A single concentric view of the position of any contract is presented to both the project and management team; in the right language and format to support the continuous monitoring and control defined for the contract.

From a summary view of performance it is easy to navigate to relevant information vertically and horizontally, to show cost analysis by resource, activity, resource provider or source, and comparison to budget and forecast. The enquiry is simple to tailor so that the project team, management and the client are all presented with content that is coherent and pertinent to their needs.

On-line live enquiry and reporting directly from the central source of information into the contract cost structure and CVR reports provides a streamlined and accurate process; saving time and resource so that focus is on performance monitoring rather than information capture.

**Flexible Budgetary Control**

As the project life cycle moves through its phases from inception at tender, to planning and build, each phase is controlled by monitoring and comparing the performance against the budgets and forecasts.

Electronic loading of budgets from other estimating systems or a flow from within the integrated Summit 5000 solution ensures that the budgetary process is timely and accurate. With this data held against the contract, control and monitoring is simply a comparison by period of budget value versus actual value at any chosen level.

Commentary stored against the individual budgets provides the explanation to support amendments and revisions of the budget and is available to management and the project team subject to access rights.

Retrospective reporting variance is supplemented by proactively controlling budget usage at an early stage when entering orders and cost transactions thus improving control and enhancing responsiveness.



### Cost Value Reconciliation

Leverage the experience and control exemplified by key contract management personnel across the rest of your business. Often disparate systems such as spreadsheets and databases exist across businesses and in the short term they provide a personalised source of information to the author of the system. However these soon create islands of information which essentially lead to inefficiencies that are manifested by error, duplication and inaccuracy.

Develop your CVR process based on best practice and by managing it within Summit 5000 to lead to a more consistent and controllable process where the project management can cut or freeze costs by valuation date or period, apply adjustments with supporting commentary and yet still report the CVR in an Excel model if desired.

Management can rely on reported valuation and margin as its source is from a central database, movements in cost from valuation date to accounting period end are reconcilable and so all parties in the business are working to the same basis.

### Cash Flow Forecasting

As a means of monitoring the overall contract performance and the performance of the business cash flow, the forecasting module provides management with an additional tool which can highlight potential contract performance problems and potential cash shortfalls.

Cash Flow Forecasting can focus the project team on cash awareness by presenting the cash position of the contract to site staff within the normal contract enquiry view. Forecasting both the short and longer term contract position and business cash position and reflecting this back to the company bank accounts means that financial risk and exposure are highlighted at an early stage.

Using cash as a measure makes it more difficult to mask poor performance by making financial adjustments - it's either due or paid, and accruals and provisions are ignored. Managing the cash position when used together with traditional cost and value measurement provides a more rounded view of performance. Reporting using dynamic live links to source ledgers and direct output into Microsoft Excel provide timely and accurate feeds into your business cash flow models and exception reporting.



## Operational **Plant Management** Overview

The **Plant Management module** manages all aspects of Plant control. From raising orders on your own plant depots to external suppliers, tracking and managing day to day processes to supporting investment decisions. Plant costs can be accurately and frequently determined allowing information to be viewed or reported on.

### Improve efficiencies in the use of all plant and equipment

From ordering, on/off hires, time sheets, transfers and consumable and delivery charges, and whether owned or hired in, the process of managing plant follows a simple series of screens to manage day to day operations. System generated accruals saves 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.

A suite of comprehensive Crystal reports, together with tight integration to Microsoft Excel means that externally generated spreadsheets supporting plant charges or plant on site reports are unnecessary.

### Implement strong internal control of all plant resource and have visibility of company assets

External charges can only be matched against accruals which you control up to a specific time. User definable timesheets provide the mechanism for both control and generation of operated plant and vehicle charges. Serial numbering of all plant, whether owned or hired in makes it easily identifiable.

### Enable assessment of the cost effectiveness of owned versus hired in Plant

Management can make informed decisions based on system generated information on the cost effectiveness of the plant fleet. By assigning cost collation at item level or against the plant group, internal revenue and operating costs can be captured and profitability and utilisation reports can be generated to support investment decisions.

### Legislative and Health and Safety Compliance

Fully CIS compliant, the system records all aspects of subcontractor operated plant. Any relevant health and safety requirements including mandatory safety equipment can be automatically reported and the user is prompted during order or on hire process.



**Operational Estimating Overview**

The **Estimating** module of Summit 5000 allows the automation of your estimating and tendering process and supports all aspects of estimating work.

**Creating estimates**

Summit 5000 includes easy to use import routines to import estimate data into the module saving vital time at the front end of the estimating process and allowing the estimator to commence pricing at an earlier stage on the data as supplied by the customer or QS. Data can be imported in CSV, CITE and image format using a specially designed scanning and imaging routine where hard copy documents need to be worked on.

Once in the system, there is only one copy of the estimate data being maintained, but with the potential for multi-user access so that estimators can be pricing different elements of the same job at the same time, making the best possible use of resources and avoiding duplication.

**Estimate Production:**

**Libraries**

A single source of library information provides easily updated and maintained pricing information to estimators, buyers, surveyors and all members of the contract team. The system can also be easily accessed through a web browser for interrogation purposes.

Access to the database can be limited to read-only or barred to maintain its integrity if required, and regional variations can be catered for.

A simple search structure makes finding individual pricing information an easy process requiring little training or induction for new employees.

Price increases can be fed into the system to update a range of items as required, keeping pricing information as up to date as possible

**Bill Pricing**

The libraries can be easily utilised in building up estimate specific pricing information and the system allows estimators flexibility in terms of how the bid is built up, with various pricing modes allowing fast entry of one-off rates and lump sum entries to be made if required.

**Configurable Screens**

User defined screens can be set-up allowing estimators their own views of the centrally held data and integration with other desktop applications such as Microsoft Excel ensures best possible use of common desktop tools to carry out certain functions in estimating. Tools can be used to eliminate mistakes, by highlighting elements of the estimate which require further attention such as un-priced or partly priced items.



**Resource Comparison**

As the estimate is compiled resource lists are built up by the system which can be globally adjusted and changed to feed back through to the estimate allowing the estimator to update prices and cater for specification changes quickly. Multi-user access allows buyers to use the facility to update the estimate with quoted supplier rates as the estimate is being worked on. Time savings can be achieved as all departments can work on the same information at the same time - rather than waiting for tasks to be completed or handed over before going to the next stage.

**Tender Overview and Summaries**

Last minute pricing changes or adjustments can be achieved at a key stroke allowing a bid against a tender deadline to be as up to date as possible and accurately recorded. If further adjustments and negotiations are required, information held on the system in terms of profit, where this is held and adjustments made in anticipation of better buying can clearly highlighted thus allowing faster and more informed decisions to be made.

**Tender/Estimate Adjustment**

Allows calculations for Profit and Overheads to be made quickly and distributed across the estimate in a number of ways. This allows the final tender meeting decisions to be made on more accurate information and shows all implications should the job be won.

DEMO - A Demonstration Estimate

Line Local Updated: 28-02-03

Buildup: 238.20 Per: 1.00 m2

Qty: 201.00 Factor: 1

Entered Direct: 100.00

Value: 47978.60

MASONRY

F10: BRICK AND BLOCK WALLING

Walls Precast concrete blocks, BS 6073, strength 3.5 N/mm2; in cement mortar (1:3): 100 mm solid blocks

Code	Description	Qty	Rate	Price Basis	Output	Extension	Subcontractor
D0302	Bricklaying gang (2+1)	0.5714	14.00 *	Per Hour	1.7500	8.000	
MD002	100 mm concrete blocks 3.5 N solid	1.050	5.85 *	Per m2	0.9523	6.450	
MD020	Cement mortar (1:3)	0.005	50.38 *	Per m3	200.0000	0.252	
MD000	Facing Bricks (PC 200:00)	1.000	200.00	Per 1000	1.0000	200.000	
E1001	Metalworker craftsman	1.000	7.75 *	Per Hour	1.0000	7.750	
G5001	Roof tiler	1.000	8.00 *	Per Hour	1.0000	8.000	
G5004	Sheet metal roofer	1.000	7.75 *	Per Hour	1.0000	7.750	
BWK	Brickworker	1.000	0.00		1.0000	0.000	

Buttons: OK, Close, + Composite, + Labour, + Materials, + Plant, Create, Road, Delete, Edit



**Reporting**

Standard reports are provided allowing full breakdown of all elements of the data held in the system. The use of Crystal Reporting allows standard reports to be edited and amended to suit individual company requirements. New reports can be added to the system and presentation is completely at the discretion of the organisation using the system.

**Supplier and Subcontractor Comparisons**

All the functionality here can be used as both an estimating tool and also as a contract management and procurement tool.

**Databases**

Supplier and subcontractor records are held in a central shared location, so that a common database can be used, maintained and updated for the whole organisation and used in procurement, estimating and accounts functions.

Each record can hold vital account information including basic details, locations, trades, product range and performance criteria. This can be used to interrogate the database making it easy to find vital supplier and subcontractor information quickly.

**Tagging**

Estimates can be easily tagged or marked up to generate trade packages for both material and subcontractor enquires and comparisons.

**Enquiries**

Enquiry documents can be generated in a variety of formats to make sending out and controlling the enquiries a more manageable process and allowing easier delegation of the tasks involved to different members of the estimating or contract team. Mail merging in Microsoft Word allows enquiry letters to be generated automatically to the selected suppliers and subcontractors. The system will produce address labels and envelopes if the documents are being posted or enquiries can easily be faxed or emailed. Only the items selected for quotation are printed reducing paper wastage.

**Comparison Module**

This allows detailed analysis, comparison and adjustment of any quote received for each trade or product group. It includes functions such as quote levelling, which can be automatically carried out by the system or with user input, and in the case of subcontractors, identifying what elements are being quoted for in terms of labour, material plant etc.

What-if scenarios can be carried out and all of this functionality allows more accurate selection of the quote to be used and better risk assessment. The comparison records are maintained and are available to the contract team if the estimate becomes a contract and can then be used to carry out further comparisons and include quotations from additional suppliers or subcontractors. This reduces the confusion and misinformation that sometimes accompanies the handover from estimating to the contract team.

Multi-user capability allows comparisons and the estimate to be worked on simultaneously - again making the best use of the time and resources available.



**Operational House Production and Sales System Overview**

*The Summit 5000 House Production and Sales solution is a module that offers specific operational control of the planning, development and sales process. The solution integrates with the financial suite providing the framework for reporting both corporate and development performance.*

**House Type Maintenance & Estimating**

Summit 5000 enables multiple versions of a standard or generic house type to be created. For example a regional and site specific house variant can be produced from the initial standard. In addition, defaults can be set for subcontract work packages and build plans which are copied to the variants for adjusting to suit the specific scheme or development. This process can automatically build up a resource schedule for the house type, development phase or scheme. Summit 5000 includes infrastructure cost estimating and integrates with the Summit 5000 Planning & Procurement module as well as industry standard project planning packages. Budget and forecast costs automatically update the Summit 5000 costing system.

**Site Planning**

Site planning allows you to define and manage the plot mix of a development. House types are automatically fed from house type maintenance allowing you to allocate them to plots. Then plot specific changes can be applied such as handling etc. In addition to estimated costs for any given plot, the system enables you to define your own fields so that information held at plot level is totally in your control. Examples of the type of information you might wish to hold could include anticipated selling price, square footage, target available dates, planning approval information, plot options and customer choices, sales stage, build stage, revenue per square foot, key dates, selling agents and solicitor information.

**Planning & Scheduling**

With integration to Microsoft Project the plan can be directly edited from within Microsoft Project which can then update the Summit 5000 system.

Using the build plan, Summit 5000 can produce a buying schedule which incorporates a buying list with 'required by dates' based on the project plan. This information is then immediately available in the Summit 5000 Procurement module, with an option to raise orders automatically or manually as required. The procurement suite is automatically updated if the development plan is modified and it automatically raises order amendments for all items ordered but not yet delivered.



### Valuations & Subcontractor Management

This module handles all elements of subcontractor management including subcontract enquiries, tendering, comparisons and subcontract ordering. The module automatically updates commitments to the project ledger. As work progresses it is recorded by tick sheet valuations at plot and stage level, automatically updating accruals in the project ledger. Non-plot based valuations such as roads and sewers can also be handled by the system.

Summit 5000 then manages all subcontractor payments including certificates, incorporating all CIS legislation and produces a plot payment summary. Final updates of actual costs are processed into the project ledger. There are also options for wireless data capture of tick sheets using mobile devices on sites.

### Housing Sales

This module is an extension to the core Summit 5000 sales ledger and handles the house sale transactions including reservations, deposits, completion statements, extras and disbursements. Housing sales automatically updates all plot records from sales transactions and gives the commercial and sales & marketing teams an up to date status on every plot. It includes a user definable database extension which enables sales & marketing information to be captured and reported upon.



**Operational Service Management Solution Overview**

The **Summit 5000 Service Management solution** is a set of modules within Summit 5000 to offer specific operational control of the service and facilities management process including managing maintenance and small works. The solution integrates tightly with the back office suite providing a seamless solution for managing the service operational workflow together with the costing and final billing to clients. The solution is in short an integrated company wide management system – *from call to cash*.

**Who is it for?**

Summit 5000 Service Management has been developed for organisations involved in high volume often-low value jobs such as:

- Small Works Maintenance
- Building Services
- Facilities Management

**What does the solution cover?**

Summit 5000 covers the whole service process from:

- call management,
- control and scheduling of jobs,
- final job invoicing,
- profitability analysis on jobs
- managing schedule of rates

Operative	Operative Name	Timeslot	Wed 24/11	Thu 25/11	Fri 26/11	Sat 27/11	Sun 28/11	Mon 29/11	Tue 30/11
CC	Charles Carr	AM							
CC	Charles Carr	PM	PPM000001						
DD	Douglas Dakes	AM							
DD	Douglas Dakes	PM	LN0000006						
H&P	Heating & Pipework L	AM			LN0000011				
H&P	Heating & Pipework L	PM							
LS	Leslie Seal	AM							
LS	Leslie Seal	PM							
MH	Montgomery Haywood	AM	Holiday	Holiday	Holiday	Holiday	Holiday	Holiday	Holiday
MH	Montgomery Haywood	PM	Holiday	Holiday	Holiday	Holiday	Holiday	Holiday	Holiday
PL	Paul Leach	AM							
PL	Paul Leach	PM							
SA	Shepherd Airconditio	AM							
SA	Shepherd Airconditio	PM							

*Manpower scheduling is shown clearly allowing work to be allocated to either an employee or sub-contractor*

The solution can be deployed in a flexible manner either fully integrated with **Summit 5000 Financials**, or stand alone as required.

**Which types of work are managed?**

- Pre-Planned Maintenance (PPM)
- Reactive Maintenance
- Day works
- Schedule of rates based work
- Time & materials or cost plus invoicing.

Customer	Location	Asset	Service ...	Description	Last Service	Frequency	Interval	Next Service	Exclude
POST001	1	AIRC0N1	1	WEEKLY FILTER CHECKS	16:11:04	0	7	23:11:04	<input type="checkbox"/>
EVA001	1	ACU002	2	WEEKLY CHECKS	23:11:04	0	7	30:11:04	<input type="checkbox"/>
POST001	4	AIRC0N2	1	WEEKLY Filter checks	23:11:04	0	7	30:11:04	<input type="checkbox"/>
BAR001	G0001	1ST FLOOR	1	WEEKLY CLEAN EXTERNAL	23:11:04	0	14	7:12:04	<input type="checkbox"/>
BAR001	G0001	1ST FLOOR	2	2ND SERVICE	23:11:04	0	7	7:12:04	<input checked="" type="checkbox"/>

*For regular planned maintenance, Summit 5000 keeps a log of all work undertaken and will allow future planning of maintenance work*



## Operational **Service Management Solution** Overview

Summit 5000 tracks the job from order through to completion and final invoicing. It is a seamlessly integrated solution to ensure data is not re-keyed at any stage and thus accuracy and control are maintained. Summit 5000 makes efficient use of technology to avoid high volumes of paperwork when managing jobs in what is traditionally a very labour intensive process. The solution automates the whole service process and offers a much clearer view of the business even when spread across several locations or regions.

### Features include:

- Ability to control the priority of jobs to ensure target response times are achieved to meet any client imposed KPIs and Service Level Agreements.
- Improves client satisfaction by offering reports and documentation (such as invoices) in a format that suits them.
- Includes an option to offer clients access to the solution via a secure extranet link in order to review status of jobs.
- Manages planned maintenance schedules by automatic generation of job tickets for each contract.
- Invoice management – all integrated and automatically generated when jobs are completed – to ensure improved cash flow.
- Flexibility through user-defined workflow to accommodate the variety of contracts, clients and work processes
- Management and scheduling of engineers for jobs based on skills and expertise – using the resource diary.
- Easy to use Windows environment which integrates with common desktop applications such as Microsoft Office.
- Option for an entry level solution with pre-defined workflow.

### Summit 5000 Service Management Offers:

- Multi-user solution
- Client/Server or stand alone
- Options to use in a web browser
- Call centre front end
- Integrated quotes/estimating
- Field based mobile solution

*“The service management solution helps us to dispatch invoices earlier, which has a dramatic effect on improving cashflow, facilitates customers’ requirements for ‘open book’ accounting and we can now use the job history to tender more competitively for future work.”*

Roy Hunter, Finance Director, Withey Group

### Return on Investment

- More efficient processing
- Timely submission of invoices
- Quicker cash collection
- Proactive management against Service Level Agreements
- Avoidance of penalties
- Improved resource utilisation



**Summit 5000 Service Management Core Product**

At the heart of the product is a user-defined workflow system controlling the stages, statuses and priorities that you follow for specific clients or any given contract.

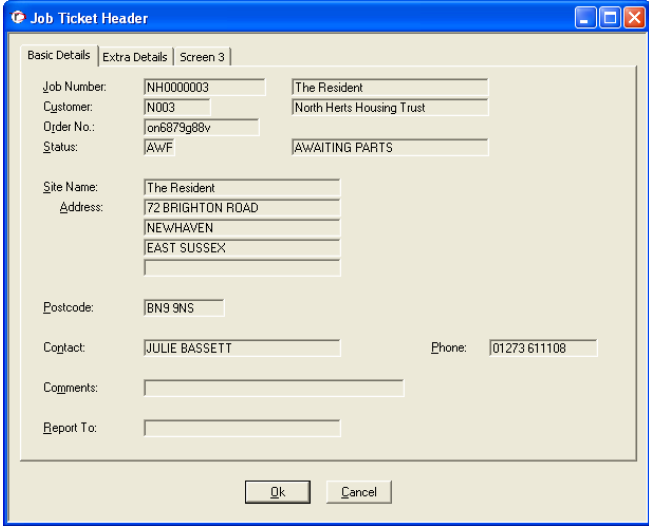
**1. Workflow**

Users can define a controlling rule set – which is the definition of the stages that a work ticket *could* move through in its life cycle.

An example could be:

- Enter New Ticket
- Amend Ticket
- Inspection Required
- Inspection Complete
- Work Complete.

The controlling rule set also determines what status (or range) that a ticket must be in before the system will allow the next stage to be completed. The movement to a stage can trigger an automatic e-mail to a specified person such as the Surveyor or Contracts Manager. E-mail groups can also be used including external contacts. This is particularly useful when a stage such as 'awaiting materials', or 'inspection required' is reached.



*The screen shows the logged job details, including the current status of this job.*

**2. Priorities**

These are user definable by contract. Priorities can be on the basis of a number of hours (including when a day starts and ends) or a number of days. It will also account for working at weekends and Bank Holidays. This information is used to prompt the user on input of a work ticket with the anticipated completion date and time.

**3. Service Schedules (for PPM)**

Routine maintenance contracts can be easily controlled using location assets service schedules.

For each client a list of locations can be held; against which you can record the service details of any item of equipment you are contracted to maintain.

By entering the last service date and the service interval, Summit 5000 can create the required job tickets when the service becomes due, complete with any relevant resource lines for standard items, which can be carried through to invoicing.

*"On a day to day basis, the system allows me to get an instant picture of each job's status at the touch of a button."*  
Shaun Salter, Small Works Manager,  
Ellmore Construction



Plan it

Cost it

Build it

Bill it

#### 4. Tracking Status

The status of the ticket can be tracked using an enquiry program where the user can define tracking criteria. These criteria may show, for example, all orders for a depot that are in a waiting status (materials, inspection, access) or all orders that are within say 2 hours/days of their completion that are still outstanding. This enables a proactive approach to be taken by the management.

The ticket can be moved through the statuses defined for that client and the system date and time stamps the changes. Priorities can be automatically re-calculated based on statuses i.e. if no access add X days/hours to the completion date

#### 5. Print a Job Ticket

The industry standard Crystal Reports tool is used to print the job ticket; this allows a great deal of flexibility in the layout of work tickets. Users can customise tickets with different formats for each client they work with.

Job Ticket	Site Name	Work Desc	Date Received	Date Target	Time Target	Priority	Order No.	Status
JC000003	Evens & Co Ltd	CANNOT SWITCH UNIT ON	19/10/04	20/10/04	21:39:49	P2	0N7H776	LEDGERS UPDATED
JC000004	Evens & Co Ltd	AIR CON UNIT IS NOT CHILLING	19/10/04	20/10/04	10:30:25	P1	668	LEDGERS UPDATED
JC000007	99 RED SQUARE	WDRK	22/10/04	22/10/04	14:25:21	P1	777	LEDGERS UPDATED
JC000002	SUSSEX BARN PUBLIC HO	Repair to window	29/10/02	1/11/02	11:41:48	N	ABC2543	LEDGERS UPDATED
LN000001	Post Office House	ROLLER SHUTTER IN LOADING BAY	22/11/04	22/11/04	18:04:34	2	784JK Y979	CONFIRMED COMPL
LN000002	Post Office House	Attend to leaking tap in kitchen	22/11/04	22/11/04	18:45:05	4	Y1	INVOICED
LN000003	Vehicle Depot South	LDGSE KEEPING O/S ENTRANCE	23/11/04	23/11/04	13:51:24	4	666	QUOTE REQUIRED
LN000004	Regional Call Centre	WDRK	23/11/04	23/11/04	14:21:25	4	797	QUOTE REQUIRED
LN000005	Central Sorting Office	Entrance door is sticking	23/11/04	23/11/04	14:08:59	2	5677598789	
LN000006	Regional Call Centre	Leaking overflow pipe in kitchen wall	23/11/04	23/11/04	14:13:17	2	0N756567	INVOICED
LN000007	Vehicle Depot South	Outside lights hav fused	23/11/04	24/11/04	00:27:09	4	7987	JOB COMPLETED (ve
LN000008	Regional Call Centre	Carport works as per Order	23/11/04	23/12/04	20:48:31	4	6677866	JOB COMPLETED (ve
LN000009	Regional Call Centre	maintenance	23/11/04	23/11/04	21:01:28	4	6689	ORDER LOGGED
LN000010	Regional Call Centre	Lock needs replacing on side entrance	23/11/04	23/11/04	17:03:11	4	JK8888796	ORDER LOGGED
LN000011	Regional Call Centre	Drains are blocked in carpark	23/11/04	24/01/05	21:06:24	4	667JK888	CONFIRMED COMPL

The tracking screen shows at a glance the status of all current work

#### 6. Schedule of Rates

Multiple schedules of rates can be associated with each client/contract. These can be imported electronically.

Item ref	Description	Unit price cost	Rate
112011	WALL 225MM CHEM INJECT DPC INT	9.120	9.1200
1101	LAY NEW 127x254MM PCC KERB	20.350	20.3500
1103	RENEW 127x254MM PCC KERB	14.200	14.2000
1105	REBED ANY TYPE OF PCC KERB	8.330	8.3300
1301	RENEW NE 250x125MM	17.090	17.0900
1303	REBED NE 250x125MM	9.390	9.3900
1501	LAY 50x150MM PCC EDGING	13.260	13.2600
1503	RENEW 50x150MM PCC EDGING	9.490	9.4900
1505	REBED - STRAIGHT/CURVED	6.390	6.3900
1507	RENEW 25x150MM TIMBER	4.740	4.7400
3001	EXC H CORE 75MM CONC BED	18.820	18.8200
3003	EXC H CORE 100MM CONC BED	23.360	23.3600
3005	RENEW WITH CONCRETE 75MM	21.820	21.8200
3007	RENEW WITH CONCRETE 100MM	27.310	27.3100
3009	EXTRA NON SLIP FINISH	1.680	1.6800

Schedule Items can be picked from the list at any time during the workflow process of a job.



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### 7. Enquiry

Work tickets can be enquired on using multiple search criteria including:

- Work Ticket number,
- Contract, Customer,
- Customer Order,
- Site Address,
- Status.

*This enquiry screen shows the main details of the job including the priority*

The screenshot shows a software interface with the following fields:

- Customer: POST001
- Rec'd Date: 24-11-04
- Ordered By: PS
- Location: 1
- Address: Post Office House, 23-53 Green lanes Road, Bromley by Bow, London
- Post Code: E1 3GB
- Depot: HO
- Contact: Peter Smith
- Report To: Office Manager
- Site Comments:
- Priority: 4
- Target Completion on: 24-11-04
- Work Required: Attend to Leaking Tap in Kitchen
- Notes:
- Schedule Item:
- Category: A
- Order Date: 24-11-04

### 8. Completion

The ticket is marked as completed and charge details can be added, this is achieved by reference to a resource list of labour, materials and plant costs. Uplifts and discounts can be applied to these and general text comments can be added to describe work. A minimum order value can be applied if the items on the order do not reach a set value.

### 9. Invoicing

Once the detail of what is to be invoiced has been input, the works ticket can be marked as ready for invoicing.

Invoices can be produced per work ticket or grouped over a time period by customer or contract. Where a 'bulk' invoice is input a backing sheet is produced giving details of the individual values. 'Pro Forma' invoices can be produced to allow for modification of invoices prior to submission of a VAT invoice to reduce the need for credit notes.

Invoice layouts are definable by client or by specific contract.

The Sales Ledger and Contract Ledger are automatically updated with the invoice information.

*"We use the system to track works through to completion and when each job is completed the software is used to invoice our clients. It also helps manage and schedule the proactive work such as garden and road maintenance. We can now review the whole Annington contract and ensure that we continue to meet the service level agreements in place."*

Neil Oakey, Project Manager, MITIE Scotgate



## 10. PDA and Summit 5000 Service Management

The introduction of mobile working can cut response times and increase efficiency. Better resource scheduling will result in a reduction in costs and improvement in cashflow.

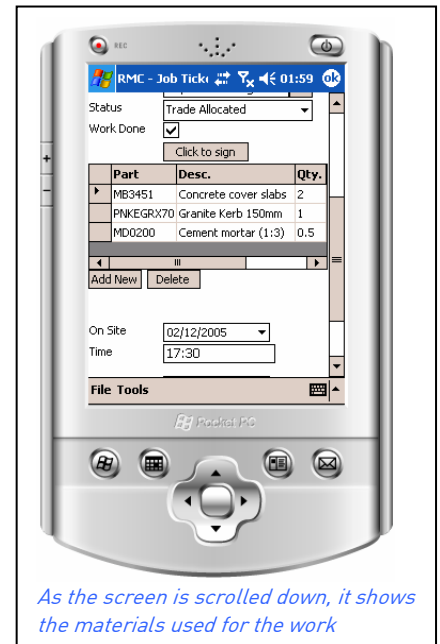
The workflow within Summit 5000 Service Management can be tailored to suit your business workflow with the layouts and functions being matched to your specific requirements

Benefits:

- Real time updating of Job history \ Status
- Reduces double entry (engineer updates paper copies, office then updates system etc)
- Reduces need for paper Job Tickets to be printed and distributed to operatives
- Increases efficiency of getting jobs completed and ultimately invoiced
- Faster response times
- Reduction in paperwork
- Secure data
- Improved accuracy



The necessary materials and equipment are listed on each job ticket. When a batch of job tickets are sent to an operatives PDA, all materials for that batch can be loaded into their van to save time having to go back to the depot/stores. Should an emergency job be required, details can be sent to the operative's PDA instantly, therefore increasing response times for emergency repairs.





Plan it



Cost it



Build it



Bill it



Once the job has been completed, the operative changes the job status to complete and the time recorded and sent back to the office.

A signature for the work can be collected on the screen. The job can then be invoiced instantly as the information is fed from the PDA into the Service management software and in turn updates the accounts system.

### Technology

The screens visible on the PDA are designed using XML. This allows the design to be flexible, and tailored to the user's specification. Different screens can be used for different workflows, so that only relevant information is passed to field based operative.

Communication between Summit 5000 and PDA can take place at any stage in the workflow. Information can be recorded on the PDA and be passed back updating Summit 5000 Service Management, without further manual intervention.

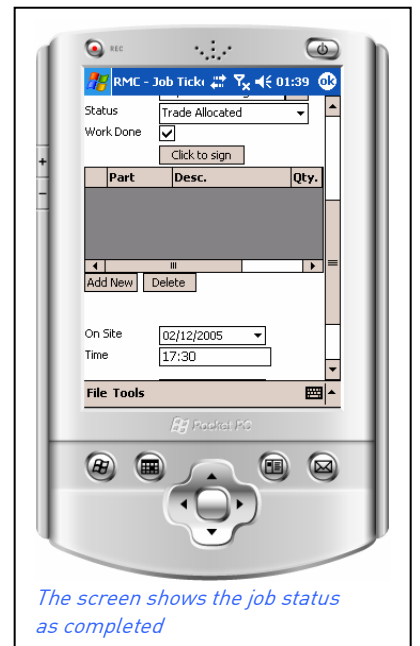
This can be in the form of Key Dates & Times, Signatures from the client, Status of the call, Materials Used, Text and any filed that exists within Service Management

Photographs can also be taken and attached automatically to the relevant call, if using a camera enabled PDA

Data can be picked and verified from maintainable lists, e.g. Materials, Available Status, Hold reasons etc



*The time on site and off site is recorded for timesheet and invoicing purposes*



*The screen shows the job status as completed*



*A signature from either the contractor or client is sent with the completed job ticket*

Data is transmitted via the current email system, in conjunction with the RedSky IT Mobile Client (RMC), thus allowing various means of transmitting data to and from the PDA (eg GPRS, Bluetooth Modem, Activesync)



#### Additional Modules **Stock** Overview

*Stock is part of Summit 5000 additional modules and provides the control and monitoring of the stock of the business. A tool to facilitate effective stock management and ensure that working capital is optimized in the business*

#### Effective Stock Management

Managing stocks efficiently requires the ability to plan and prepare for future requirements and best practice requires proactive management and maintenance of optimal levels of stock across the business. This process requires considerable information processing as the business is continually changing and there are numerous factors that directly and indirectly affect management decisions. The Stock Management system can help make the appropriate management decisions at the right time to achieve objectives and ensure that the value in the balance sheet is fully supported and substantiated.

#### Monitoring and controlling stock

By reporting exceptions in advance such as: stocks that are nearing re-order levels, stocks over maximum and minimum, slow moving stock, unexplained stock losses, or potential stock outs, then management can properly monitor the current and future position across the business and its locations and act in a proactive fashion. Purchase Orders to replenish stocks can be raised, stock transfer between locations to satisfy demand, set aside adequate financial provisions against obsolete stock and if necessary request and carry out unplanned stock takes.

#### A flexible approach to day to day operations

Stock takes can be processed off line and hence retrospectively which means day to day processing can continue as normal and the stock take can be captured at a point in time. Control is maintained by the system generating stock take numbers, and holding the names of the stock takers and of those responsible for entering the results.

Reserve stocks can be held and fully managed against contracts so that stock levels incorporate planned future requirements. Providing stock enquiries across locations and bins means that the business can manage the utilisation of stock and make stock transfers, where appropriate, to satisfy current and future requirements. The average value of stock ensures that contracts are charged on a fair value rather than based on the branch price paid for the stocks

#### Accountability and Audit ability

Stocks are valued in accordance with the accounting policies of the business and a clear audit trail exists between the stock control accounts, which support the value of stocks held in the balance sheet, and the underlining stock transactions processed across the business locations. A suite of Crystal reports provide a wide range of analysis and exception criteria to support business decisions on stock management and to provide a clear audit trail.

#### Sharing a common product library

This offers the development and use of a structured product library, which can be as simple or as comprehensive as necessary, and is shared throughout the business. From Estimating, Planning, Procurement and Stock Management through to Finance, a common product library provides a framework and common language shared across the whole business. A hierarchical structure organised under appropriate groups allows users to easily recognise coding and saves time by avoiding duplicating text and only maintaining a single code.



**Additional Modules** **Fixed Assets** Overview

*The **Fixed Assets module** provides the control and management of the Fixed Assets of the business, including financial and maintenance controls.*

**A fully integrated Fixed Assets module where all accounting is automated**

All accounting depreciation charges are posted directly into the General Ledger with integration into the Cost and Plant Management system for further analysis where required. Automation offers time and cost savings by not having manual processing such as entering asset details, rates and values into spreadsheets and then entering depreciation charges as journals back into the accounting system. Financial control over the business assets and the accounting charges means that the process is fully auditable with a supporting audit trail and hence offers visibility from charges in the accounts to the assets of the business.

**Asset Maintenance allows fleet management to support the business in day to day operations**

A simple location and tracking process allows fleet management to easily identify the location of its assets, and when used with Plant Management can manage day to day fleet movement by timesheets.

This is a fully user definable tool to manage and maintain the business assets from setting up maintenance service schedules and service agreements which report to management when an asset is due for service to the full history of an asset and its running costs. The business can assess more readily the true running cost of all of its assets including those that are charged out across the business.

**Streamlined Reporting**

Offers all traditional fixed asset reports such as the asset register and supporting schedules plus the additions and disposals schedules. The depreciation reports are produced automatically to support the financial notes to the Profit and Loss Account and Balance Sheet. In addition a suite of standard reports provide essential management information such as assets at given locations, and assets due for service.



## Summit 5000 System & Technology Overview

The Summit 5000 **System** is designed with a common set of feature rich components that are available to all modules within the suite. They provide a consistent frame of reference for the successful deployment, training of users and efficient maintenance of an enterprise wide system.

### Desktop Client Technology

The **RedSky Desktop Client** (RDC) is a true 32-bit windows 9x/NT/2000/XP application, which provides full integration to the desktop allowing it to make maximum use of these technologies (COM, OLE2, ODBC). The Summit 5000 system is a Client/Server architecture where the client runs the software that provides the user interface, providing control of data entry, presentation of information and generally controls the application. The server stores the data and handles the business logic processing the data and passing the relevant results to the client. Client/Server makes more efficient use of the network and allows a more efficient WAN (Wide Area Network) to be employed.

The RDC provides a **built in Crystal reports runtime** (without additional Crystal licensing requirements) that allows standard and custom report templates to be rendered on the desktop. These templates are stored server side and delivered automatically as required to the RDC.

The RDC can be run in both a main Window mode or in the background in the **Task Bar Notification Area**. Running RDC in the system tray provides access to the normal menu under the same security rules but launches the programs or reports directly in a Window of their own. This can be useful for users who are more orientated towards reporting and enquiry.

A **Quickconnect.rdc** can be distributed in email which launches the particular program when selected: for example to click to approve an invoice. The normal security controls are not bypassed when using this mode of the client.

**Business Intelligence on the desktop**, provides sophisticated users with a way of managing report production. The usual parameters for reports can be collated into templates held server side and then the .mdb databases used for the reports can be generated in the background. When the report is run the RDC advises what data is available from a specific date and time and asks whether you want to use this. This allows reports to be kept in a preview screen and then refreshed automatically according to a refresh parameter defined by the user.

### Web Client Technology

The entire Summit 5000 menu system can be run within a browser using the **RedSky Web Client** (RWC) - instead of the RedSky IT Desktop Client. All user, menu and field level **access controls are honoured**. Deployment in this manner **reduces Desktop PC management** and can be particularly useful for providing access to the system for occasional users who wish to make enquiries on the data or who carry out a specific function: for example raising of requisitions. Contract information can be made available to **external organisations like clients and subcontractors** in a secure and controlled manner using this option.



The RWC can be plugged into the RedSky IT Content Management solution – Informat, providing business processing objects alongside content, for example, Requisition Entry alongside supplier product catalogues. Informat allows you to build upon any existing Intranet you may have already.

**Security**

Security controls can be maintained at a number of levels allowing complete control of who can do what, what they can view and where in the system they can access. **User** profiles are set-up for each user and login is mandatory.

At the most basic level users have a **Menu level access** defining what type of function they have. This level can be set against the menu item. Users who do not have an adequate level or status will not see menu items with a menu access level higher than they are allocated. Users also belong to defined access groups.

**Access groups** can be defined against every node of the menu and users can belong to more than one group. Menus that do not have the appropriate access to users are not displayed to them.

**Mode access** can be defined against menu items to define whether records can be created, amended or deleted when accessed by particular users or access groups.

At account level within the **Contract** and **General ledger**, restrictions can be placed so that only specified users or access groups have access to these accounts.

Drill across enquiries can be locked down for different users using **Button Security**.

**Administrator Level Customisable User Interface**

The complete user experience can be tailored to deliver the appropriate level of simplicity or complexity required by your user community. This is done using a set of components designed to target specific User Interface controls. The most fundamental of these is to ensure that terminology employed on the screens is appropriate without having to amend and maintain every form in the system. All **field labels** on overlay forms (forms with many fields presented scattered vertically and horizontally) can be swapped for alternative labels.

For example the label 'Contract' could be swapped for 'Job' system wide. On multi-line forms such as enquiries and searches where many records are displayed in a tabular style, then the **column descriptions** can be amended system wide in a similar fashion.

The administrator can create **Global default templates** defining client side filters and formatting of records presented in the searches, enquiries and multi-line style entry screens. This configurability enables quick system set-up and maintains a consistency across the user community. Defining appropriate columns for searches enables records to be found more easily. Being able to select from a number of pre-defined templates with the appropriate columns already selected within the enquiry can aid usability.



The system administrator has **full control over the system menu** including defining terminology, accessibility and complexity. A standard base menu is provided but this can be built up using

additional entries defining alternate program options. The presentation layer (i.e. what the users actually see) is maintained by dragging and dropping items onto it from the base layer.

The **backdrop** page to the RDC is a framed **HTML web page** that can be used for broadcasting system messages, providing links to user guides and customisation using your corporate logo.

Additional fields and whole systems can be created using the **Database Module**, a sophisticated database design tool allowing additional fields and whole tables to be added to any standard area within the system. The database module supports; text, dates, lookups on cross referenced tables and validation rules.

A **Form Designer** can be used to change the layout of the standard fields on system forms or specific user forms created to support the database module. Standard forms are read-only to protect the integrity of the system but these can be overridden by saving a user form with the same name. These forms are saved in a separate file on your installation and are maintained on upgrade.

**Analysis Tags** are a generic concept throughout and allow user-defined analysis fields to be created that automatically get attached to programs. This is particularly useful for maintenances, for example creating a list of analysis for a contract; such as Region, Sector, Contracts Manager, QS, and Contract Type. It can also be used to analyse transactions for example; to breakdown employee or telephone number costs to the same GL code. The analysis can also be used for defining consolidation codes for GL consolidation rules on the GL accounts.

**Field level security** can be applied to all forms determining user or system level control of how fields on forms behave. Fields can be enabled and disabled, made mandatory, or pick lists defined to limited selection.

### MS Office Integration

COM Automation functionality of the RDC can be employed to give the user the ability to run a server side menu entry from Excel, this appears like an embedded enquiry or search using User Interface (UI). For example, a button to search for a contract could be defined in Excel and this would launch the search window and deliver the selected contract data back to that cell.

We also provide the ability to query the data on the server using a NON UI interface, an add-in can be utilised that allows a function to be defined querying GL, CL or any other data defined in the Data dictionary from the system. For ad-hoc queries all data within searches and enquiries can be dropped into an Excel sheet using a right click "View in Excel" facility.



### Crystal Reports

All modules have standard reports available with data filters to limit the ranges of the report. **Client side reporting** harnesses the power of the server to extract and sort the data. This is then passed to the client for presentation in Crystal Reports, Excel or any Windows tool recognising an Access database format.

Crystal reports is a versatile industry standard tool for designing reports, it can be used for everyday reports like a Purchase Order print through to transaction lists or summary reports. The RDC software provides a Crystal runtime that is used to render the report on the client PC. This can be previewed, sent to a particular printer or saved as a file for distribution by email/html/pdf. Crystal reports also support the access of the data held within the Oracle database using ODBC.

### User Profiles

When a user logs into the system they are presented with the menu that has been defined for them by the administrator. They have the ability to **drag and drop any item from the menu to the top toolbar** for commonly used items they want quick access to. The RDC automatically saves this against their user profile when they logout.

The user can manually **save formats and filters** of the data presented in searches and enquiries, the columns of data displayed can be determined and the order that these columns appear can also be saved along with the column widths. These templates are personal to this user and unless you have administrator level access to define global templates they will not be available to other users on the system.

The RDC automatically saves Window position and size preferences for this user. For example if you prefer to have many rows displayed in a search you could expand the window and position it appropriately on screen. This is personal to this user.

**"My Favourites"** can be set by this user defining particular contracts or menu options.

**"My Recently Used"** automatically stores the most recently used menu items for quick access.

QuickText can be managed by a user for any text field on a form. This can be maintained automatically so that text entered is added to a QuickText list for that particular field. This list can be manually maintained by the user for each field so that fixed pick lists can then be easily defined.

### Business Objects

When users want to manipulate a subset of our database files using third party software, the 'business objects impose validation and ensure integrity of data, they give third party software the ability to read, write and modify records; whilst imposing business rules to retain integrity of the data. This provides a means of structured control of the Summit 5000 data.

This technology uses COM automation. An example of where this technology has already been employed in practice is where specific functionality for Order Entry requirements needed to be met by an in-house produced systems solution. The most common use of this technology is presenting web pages alongside other systems data.



## OLE

OLE means 'Object Linking and Embedding' it is a standard term for describing the attachment of files, of any format into another application. Standard directory structures can be set-up that ensures documentation can be stored and retrieved more easily. The user can also create folders on the fly. The system actually stores links to a network location rather than storing the objects themselves within the database.

**Attachment of objects within user definable structures** against; Account level or at Transaction level. This means that scanned images, digital pictures, Microsoft Office documents including Word and Excel, Project files, and even Audio and Video files can all be accessed via the Summit 5000 system. The RDC has a built in image viewer.

**Auto attachment of .pdf to transaction records:** for example, subcontractor certificates/ purchase remittances/ purchase order/ sales invoice/ application, job ticket print can be automatically created for transactions and attached to records within the database. These could be emailed for approval in a workflow.

All attachments can easily be accessed from an enquiry or maintenance using an OLE button. A particular folder holding OLE content can be **subscribed to by a user** so that they are informed by email when new records are added.

## Finding records and information

Having a **consistent and reliable** method of searching for records and information in any system is central to user acceptance and promotes use.

A string can be entered and then a search made using F4 or mouse click, the search will begin at this point in the list. Subsequent typing of text will move to that point in the list of records. **Search strings** can be defined on all code fields using \* and ?. The search will then operate on the name field and return a subset of records that match that search string.

A Ctrl F, right click find allows a string of text search to be conducted within all searches and enquiries. This highlights the text and allows an F3 next occurrence to be found.

All enquiries in the system allow vertical drill down from account records to transactions from where the details on the transaction can be used to **drill across** to other related enquiries using a single click.

## Field Sizing

The Summit 5000 system is built using consistent field sizing across all modules. Account codes and reference fields all conform to a **30 character** field definition and names and description type fields are **50 characters**. All description text fields can use an **expanded text** facility allowing practically unlimited amount of text to be entered. Whilst you would normally design the forms to show all characters for a field, the fields on all Summit 5000 forms allow the characters actually displayed to be less than the number of characters the field will accept. A limit can be set defining the number of characters to restrict a field to, for example defining only 12 char to be used for a particular account code.



**Summit 5000 Solution Financing**

**The smarter way to pay for your Summit 5000 solution**

You already know that Summit 5000 is a powerful tool in running a more profitable, efficient business. And here's more good news: there's an easy way to acquire your new Summit 5000 solution – and start seeing returns straight away.

Our flexible payment plans allow you to spread the cost of your Summit 5000 solution over its useful life, freeing you from the need for up-front investment, and helping deliver demonstrable ROI from day one.

With so many benefits, the case for paying over time is compelling. You immediately get closer control over your budgets, and pay back the entire package at a fixed amount per month – which includes everything from installation and integration to training and testing.

**One fixed monthly payment. One powerful solution**

**Implement at your own pace**

RedSky IT's payment plan is designed to suit Summit 5000's modular approach, keeping budgeting simple. When you're ready to go to the next stage of enterprise implementation you can.

**Stay in control of costs**

Your monthly payment is pre-agreed from the outset, so you know exactly how much you'll be paying every month. You stay in total control of the cost – and your budgets – eliminating the opportunity cost often associated with implementing new systems.

**Keep hold of your capital**

Spread the cost of your Summit 5000 solution and you're instantly freed from the need for capital outlay. It's ideal for the construction industry, where you need to reserve capital for exploiting new opportunities as they arise.

**Create measurable returns**

The benefits of an enterprise software solution like Summit 5000 are seen over time, so it makes sense to pay the same way. You can easily measure returns against your monthly payments – and demonstrate added value to directors and stakeholders.

**If you're ready to take your business to new heights, use RedSky IT's flexible payment plan to acquire your Summit 5000 solution. Talk to your RedSky IT customer consultant today on 020 3002 8700**

*RedSky IT works in partnership with Leasemaster, specialists in complete computer system leasing*



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