



People with Vision

*Essential Information
For
Our Customers*





CONTENTS

WELCOME TO IT VISION	3
Resources	3
IT Vision website	3
IT Vision Support website	3
Documentation	4
User Guides	4
Online Help	4
Product Alerts	4
Software – Releases/Patches	4
IT Vision website	5
Registering on the IT Vision website	5
IT Vision Support website	8
Getting Support	9
Initial Support levels for new customers	9
Logging Requests	10
1. Support website	10
2. Email	10
3. Fax	10
4. Phone	11
Request Types	11
Supporting Information:	12
Priority Level:	13
Rectification of Issues and Escalation of Priorities	13
Response Times	14
What happens after you've logged your Request?	14
Documentation	15
User Guides	15
Online Help	15
Software Releases	16
Software Downloads	16
Remote Customer Assistance Service	17
Training	18
Scheduled Training	18
Customised Training	18
GoToMeeting online training session	18
Webinar online training session	18
Regional group Training	19
IT Vision User Group	20
IT Vision contact details	21
Training Contact	21
Support Contact	21
Sales Contact	21
Where to Find Us	22
Parking	22
Recommended Reading	22



WELCOME TO IT VISION

IT Vision Management and staff would like to welcome you to our SynergySoft Suite of specialist software.

We are committed to providing you with the very best products and services. As part of that dedication to service, we have provided the included information to help you gain the most from our support services. It explains how you can for example:

- access additional information about IT Vision and our software,
- access information about how to contact us, and
- utilise the standard procedures we recommend our customers follow when contacting us for assistance. By following these standard procedures, we can deliver the most prompt responses and solutions to make sure your SynergySoft software stay up and running, and you continue to work effectively.

This document also contains information about:

- Training,
- Software Releases and
- Our Remote Customer Assistance service.

Resources

The following is a list of Resources that are available to all our customers:

IT Vision website

Purpose: Includes Company and Product information, Documentation, News and Events, and information about the IT Vision User Group Inc.

Address: <http://www.itvision.com.au/>

Login Details: Each individual user has their own Username and Password

IT Vision Support website

Purpose: Use to log and monitor Requests for help

Address: <http://www.itvision.com.au/itvsupport/>

Login Details: Users are required to login to the site to log/view Requests. To simplify the process, each organisation is given one Username (a three letter Customer Code) and Password. You should provide these login details to all users within your organisation that you want to allow to log/view Requests.



Documentation

Each of the following sources of Documentation is available from the IT Vision website (<http://www.itvision.com.au/>) by logging in and selecting the relevant link from the Customer Support page (which is the first page displayed when you login to the site).

As an alternative, once logged in, you can navigate to the relevant information by clicking on the applicable folders in the folder tree (left side of the screen). The folders you need to select for each of the different types of documentation are included below for your reference.

User Guides

Available from:

1. the IT Vision website -
Select the Home > Customer Support > **Documentation** > **User Reference Material** folders from the folder tree
2. OR the SynergySoft Installation CD that you will receive with each new software release

Online Help

Available from:

1. within SynergySoft by pressing **F1** or selecting **Help** from the main SynergySoft menu
2. OR <http://www.itvision.com.au/documentation/help/>

Product Alerts

Available from:

1. the IT Vision website –
Select the Home > Customer Support > **Product Alerts** folder from the folder tree

Software – Releases/Patches

Available from:

1. the IT Vision website –
Select the Home > Customer Support > **Downloads** folder from the folder tree



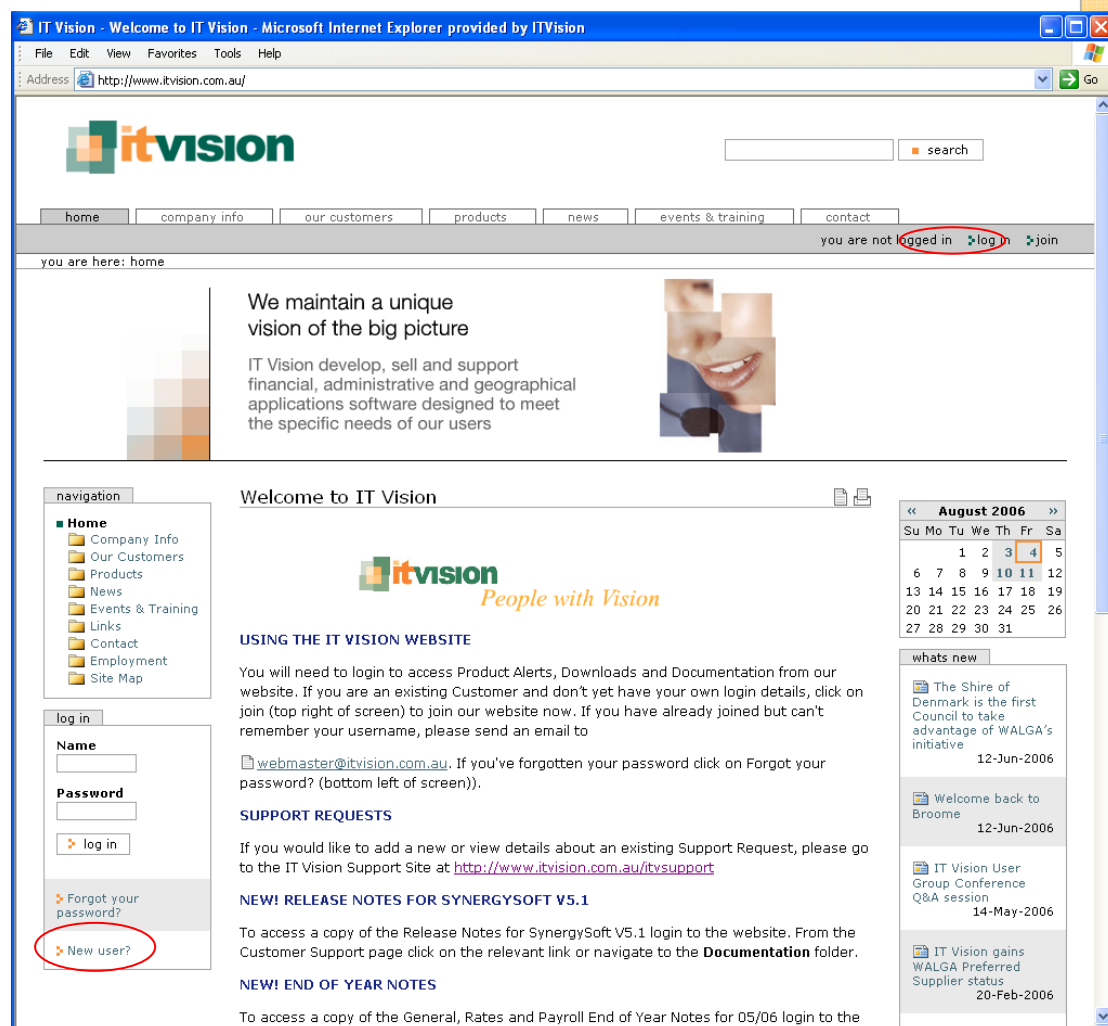
IT Vision website

Our corporate website (<http://www.itvision.com.au>) contains information about our products and services. While general information is available to all users from the website; documentation, software downloads and product alerts are only accessible after logging in.

To login, you will need to enter your own username and password and will typically be different from the login details you enter to access the IT Vision Support website.

Registering on the IT Vision website

To obtain your own personal username and password, click on **join** (top right of the IT Vision website's Home page) or **new user?** (bottom left of the Home page) and following the prompts. (All IT Vision software users are eligible to join.)



(If you have any problems registering, contact us on (08) 9315 7000 and we will assist you.)



After submitting your registration, IT Vision will send you an email to confirm that your registration has been processed. You'll then be able to use your login details (username and password) to login to the website.

Once you've logged in, the first page that you will see is the Customer Support page. It includes links to:

- the IT Vision Support website where you can log new, or view the progress of, Support Requests (SR's) and/or Development Requests (DR's). (For more detailed information about the IT Vision Support website refer to Page 8.)
- Documentation including:
 - **User Guides** – User Guides for most SynergySoft modules are available from the Documentation folder. If you need information about any additional modules please contact us.
 - **Online Help** – click on the link on the Customer Support page to access Online Help for SynergySoft.
 - **Product Alerts** – A list of Product Alerts that have previously been emailed to our customers can be accessed from the website. A Product Alert is sent to all customers via email any time that a critical issue that affects the operation of the software is discovered. In some cases a Product Alert will contain a patch to fix the issue. Where this is the case, the email will also include instructions about how to apply the patch.

Additional information on each of the above types of Documentation is included in the section called "Documentation" later in this document.

- **Software Downloads:**
Interim Releases and patches can be downloaded from the IT Vision website. IT Vision will advise you if you need to download software and will provide instructions on how to do so.



While you can access a number of topics from the Customer Support page, the following additional topics can be accessed on the IT Vision website by selecting a relevant folder from the folder tree (displayed on the left side of the screen):

- Company Info
- Our customers
- Products
- News
- Events and Training
- Announcements
- Links
- Product Alerts
- Documentation (including User Guides and Reference sheets)
- FAQ
- Downloads
- Support Requests
- Support Use Guidelines
- User Group
- Contact – IT Vision Contact details
- Employment
- Site Map

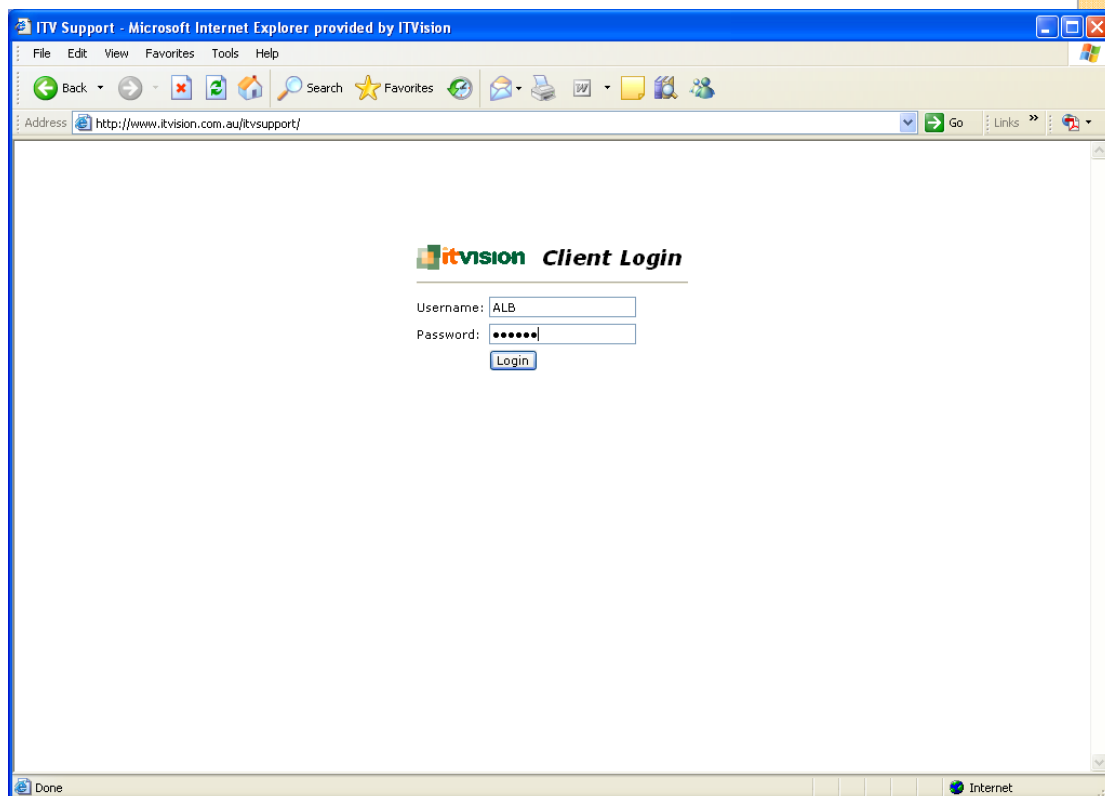


IT Vision Support website

When our customers require assistance, the relevant information is recorded in our Support system. Both our customers and IT Vision staff can add requests to our Support system. Logging requests can firstly be done through the IT Vision Support website, or via email, fax or telephone.

The IT Vision Support website also provides a way for you to view information contained in the Support system. By logging into the Support website, it is possible to view information about any Request that you have made to date, irrespective of the method you chose to your communicate your original request for assistance.

To access the Customer Support website you can either do so by clicking on the relevant link from the Customer Support page on the IT Vision website or by entering the following URL into the address bar of your browser: <http://www.itvision.com.au/itvsupport/>. When you do so a Login screen will be displayed as follows:



Enter your Organisation's three letter Customer Code and Password. (IT Vision issues all new site's with their own unique Customer Code and enables them to select a password for their organisation.)

All users within your Organisation will use this Customer Code and Password when logging into the IT Vision Support site.



If you do not know what your Organisation's login details are, please contact the person who is responsible for administering your SynergySoft system at your site or contact us by phoning (08) 9315 7000.

- NOTE: For most users, the login details used to login to the IT Vision Support site and IT Vision website will be different. Only those few users who have registered on the IT Vision website using their Organisation's Customer Code and Password as their own personal login details will be able to use the one username and password to login to both sites. (For information about registering on the IT Vision website refer to Page 5.)

Getting Support

You should log a Request when you need to:

- get advice on performing a specific function
- get information about a specific software feature
- report program errors or data corruption
- get information about upgrading your IT Vision application software
- request a change to IT Vision application software so that it better suits your needs

While IT Vision is happy to assist you with any IT Vision application software issues, we do not typically provide information in relation to:

- legislative requirements
- accounting/auditing issues
- network/hardware issues

Generally you will be able to obtain advice from your auditors, WALGA or your Hardware/Network Provider in relation to these matters.

We understand the frustration that not being able to complete your work can bring. Therefore before being delayed by logging and waiting for a response to a Support Request we recommend that you have:

- Thoroughly checked the operation, discussed it with any internal staff that may be able to assist and obtained all the relevant material to explain the issue.
- Referred to any available documentation that describes the process in question.

Initial Support levels for new customers

To ensure that new customers can quickly get up and running, additional Support is provided during the implementation phase (which runs from the time of the first project meeting with IT Vision through to date that you go live). Continued priority Support is also provided over the first 5 weeks from the time that customers switch over to their new software.




For the first 5 weeks after the GoLive date, customers are given priority phone Support. After running your new software for 5 weeks that the amount of assistance that staff require reduces significantly. At this time, if assistance is required, users should log support requests as outlined in the next section.

Logging Requests

We encourage our customers to log Requests using the following methods (in preferred order):

1. Support website

Login to the IT Vision Support website (<http://www.itvision.com.au/itvsupport>) and click on **Add New Request**.

TIP: For more information about how to Add a New Request click on the  icon located at the top left hand corner of the page. This will take you to the Customer Support website User Guide. As well as containing information about how to Add a New Request (SR or DR) it also contains instructions on how to:

- View a list of outstanding Support Requests
- View a list of outstanding Development Requests
- View the last 100 Requests that your site has submitted
- Add and edit user details
- Search for a Request (SR or DR) using the simple and advanced search options
- Submit a suggestion about the Customer Support website
- Access information about the Customer Support website and Contact details for IT Vision
- Log out

2. Email

Send an email that includes information about the problem that you have encountered through to support@itvision.com.au.

3. Fax

Fax all relevant details and supporting data to (08) 9315 7088



4. Phone

If you do phone for assistance, unless your call is Urgent or can obviously be answered very quickly, it will be logged for you to receive a call back. This allows us to provide priority to general support requests logged through the Support website.

The following Requests for assistance are given priority phone support:

- Urgent Requests i.e. Payroll issues with specific/tight deadlines
- Requests from customers that have converted to a new software product within the previous 5 weeks
- Questions that only require a very quick answer (i.e. where the question and answer is going to take less than 5 minutes)

Remember that to log a Request by Phone, our office hours are from 8:30am to 5.00pm Western Standard Time (excluding West Australian Public Holidays).

NOTE: When submitting a Request using any of the above methods, please ensure that:

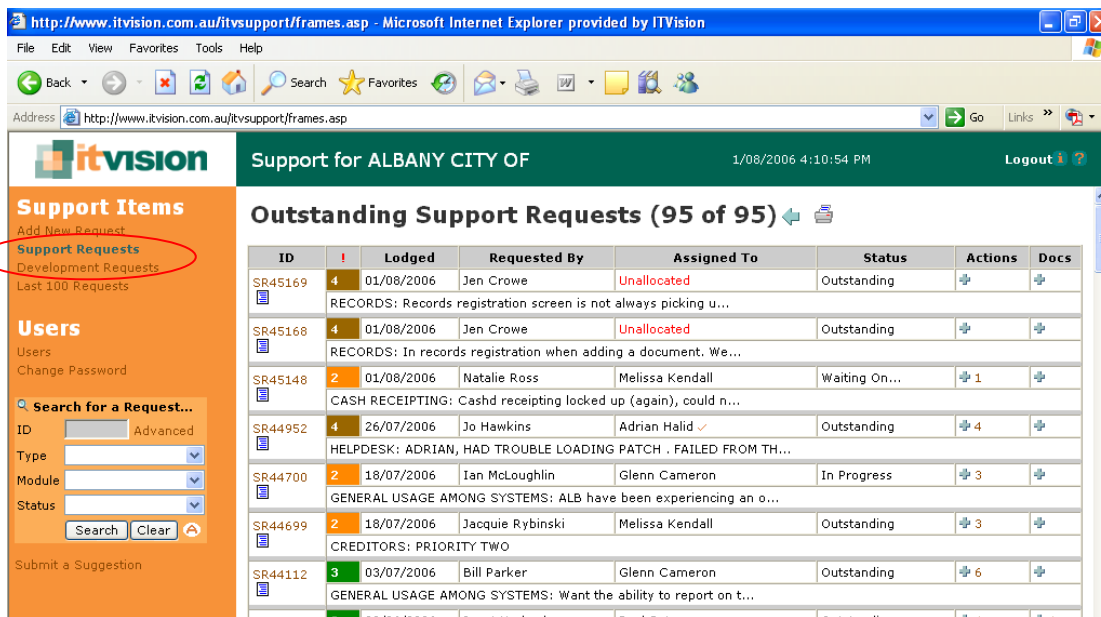
- your Request is described clearly,
- it contains any supporting information (e.g. screen captures containing error messages etc) and
- you have given it a Priority Level (1-4). (See Priority Levels below.)

Request Types

At the time that you create a Request, you specify which particular type it is. Requests are divided into two categories:

- Requests that relate to software bugs or information about how to perform a specific function within the system are considered Support Requests (SR's).
- Requests for enhancements /changes to the software are Development Requests (DR's).

Within the Support website, SR's and DR's are shown in their own separate lists. When you first login to the Support website, the list of Requests that you see will contain Support Requests only. If you want to see a list of Development Requests, you need to click on Development Requests.



Support for ALBANY CITY OF

1/08/2006 4:10:54 PM Logout

Support Items

- Add New Request
- Support Requests
- Development Requests
- Last 100 Requests

Users

- Users
- Change Password

Search for a Request...

ID: Advanced

Type:

Module:

Status:

Submit a Suggestion

Outstanding Support Requests (95 of 95)

ID	!	Lodged	Requested By	Assigned To	Status	Actions	Docs
SR45169	4	01/08/2006	Jen Crowe	Unallocated	Outstanding		
RECORDS: Records registration screen is not always picking u...							
SR45168	4	01/08/2006	Jen Crowe	Unallocated	Outstanding		
RECORDS: In records registration when adding a document. We...							
SR45148	2	01/08/2006	Natalie Ross	Melissa Kendall	Waiting On...	1	
CASH RECEIPTING: Cashd receipting locked up (again), could n...							
SR44952	4	26/07/2006	Jo Hawkins	Adrian Halid	Outstanding	4	
HELPDESK: ADRIAN, HAD TROUBLE LOADING PATCH . FAILED FROM TH...							
SR44700	2	18/07/2006	Ian McLoughlin	Glenn Cameron	In Progress	3	
GENERAL USAGE AMONG SYSTEMS: ALB have been experiencing an o...							
SR44699	2	18/07/2006	Jacque Rybinski	Melissa Kendall	Outstanding	3	
CREDITORS: PRIORITY TWO							
SR44112	3	03/07/2006	Bill Parker	Glenn Cameron	Outstanding	6	
GENERAL USAGE AMONG SYSTEMS: Want the ability to report on t...							

Supporting Information:

The following information is required when submitting your Request:

- The name of the module you are working in
- The type of Request you are making i.e. Support Request (SR) or Development Request (DR)
- Your name or the name of the person who IT Vision should contact when responding to your Request
- A description of the issue. Please include any information that will help us resolve the issue that you encountered. For example, if you were processing a batch of receipts and an error occurred, please include the number of the batch and a screen capture of the error in your request. (Select **Print Screen** on your keyboard to generate the screen capture, paste it into a Word document. If you are submitting your Request via email, attach the document to your email. If you are submitting your Request via the Support website, after creating your Request, it will be added to the list of Outstanding Requests. In the list, click on the Row that contains your Request, then click on the + sign in the **Docs** column. Click on the support@itvision.com.au link. Your document will be sent to IT Vision and will be attached to the SR for you.)

**Priority Level:**

Requests are sorted within the Support database by priority and date.

Each Request will be responded to by a Customer Support Consultant and resolved as quickly as possible. Responses will normally be by email or phone. Requests will be dealt with in a prompt and efficient manner according to their priority.

The IT Vision Service Level Agreement, if applicable to your Organisation, outlines each of the four Priority Levels and the agreed response times for each. (A full copy of the Service Level Agreement can be viewed by logging into the IT Vision website and going to the following link: <http://www.itvision.com.au/usergroup/sla/SLA.pdf>)

The following table can be used as a guide when deciding which priority level to assign to an SR:

- Priority1** The situation causes complete loss of service. Work cannot reasonably continue, the operation is mission critical to the business, and the situation is an emergency. Examples would be where the payroll software is functioning incorrectly and a pay run is due, or where the software is malfunctioning and a BAS report needs to be done.
- Priority2** The situation causes a severe loss of service. No acceptable work-around is available; however, operation can continue in a restricted fashion.
- Priority3** The situation causes minor loss of service. The impact is an inconvenience, which may require a work-around to restore functionality, or urgent advice is requested.
- Priority4** The situation causes no loss of service. The Request is considered a minor error, incorrect behaviour, documentation error, or request for advice and guidance that does not materially impede the operation of a system.

Rectification of Issues and Escalation of Priorities

With regard to Priority 1 Requests, the SLA states:

“IT Vision will work continuously until the issue is resolved or as long as useful progress can be made. Customer must provide IT Vision with a 24 hour contact during this period, to be available on-site to assist with data gathering, testing, and applying fixes. Customers are requested to propose this classification with great care, so that valid Priority 1 situations obtain the necessary resource allocation from IT Vision.”

You may ask for Requests with a Priority Level 2 or 3 to be upgraded to a higher priority if they have not been responded to within 16 working hours.



Response Times

IT Vision will undertake its best endeavours to meet or improve on the following response times that we have agreed to under the SLA:

- Priority1** 4 Hours (if by telephone, the call will normally be put through immediately)
- Priority2** 6 Working Hours
- Priority3** 8 Working Hours
- Priority4** 16 Working Hours


Please note that the above times are response times. Resolution times may be longer. In the event where a program modification is required for example, it may be necessary to wait until the next software release to receive the modification. In these circumstances, a workaround will be provided in the interim wherever possible.

What happens after you've logged your Request?

Once your Request has been submitted, it will be automatically added to our Support database and will be assigned a unique Reference number e.g. SR34601. (All Requests, irrespective of whether they are Development or Support Requests will have a prefix of "SR".)

If you log a Request via the Customer Support website, the number that has been given to the Request will be displayed on screen when you **Save** the Request.

When logging a Request using any of the other available methods, you will be informed by phone or email the Reference number that your Request has been given.

Please keep a record of the Reference number. If you know your SR (Support Request) number, you can monitor the progress of your Request from within the Customer Support website, or add additional comments to your initial Request. (Information about how to do so is included in the Customer Support website User Guide which is available by clicking on the  icon once logged into the site (<http://www.itvision.com.au/itvsupport>.)



Documentation

User Guides

User Guides for most SynergySoft modules are available from the Documentation folder on the IT Vision website and from the SynergySoft Installation CD's that you will receive with each new software release. If you need information about any additional modules please contact us on (08) 9315 7000.

While IT Vision makes every effort to keep User Guides up to date, this is not always possible and the Release Notes that are provided with new versions of software should be treated as an Addendum to the User Guides.

Online Help

Online Help for SynergySoft can be accessed using the link on the Customer Support page on the IT Vision website.

You can also access Online Help at any time while using SynergySoft simply by clicking on the **F1** button. When you do so, a help topic that contains information about the particular program that you currently have open will be displayed.

Outside of the IT Vision website and SynergySoft, you can access Online Help for SynergySoft by entering the following URL into the address bar in your browser:

<http://www.itvision.com.au/documentation/help>



Software Releases

Whenever a new major release of the software is issued, customers will receive a CD that includes the following:

- Software Installation set
- Installation Notes that explain the correct procedure for successfully installing the Software, and
- Release Notes that explain the changes that have been included in the release.

SynergySoft has a three part version number X.X.XX. The first two parts of the number signify the major release version. The last part of the number indicates the build number.

Where an Interim Release is issued, you will receive an updated version of the software on CD. You will also be issued with a printed copy of the Fixes document which contains details of any changes that have been made to the software to that point since the last major Release.

If you have any problems installing the new software, please contact us for help.

Software Downloads

Interim Releases and patches can be downloaded from the IT Vision website. IT Vision will advise you if you need to download software and will provide instructions on how to do so.



Remote Customer Assistance Service

Through the Remote Customer Assistance service we are able to provide training and support for issues that fall outside the Service Level Agreement. This Service is only appropriate where our involvement is less than a full day and no onsite work is required. The following could be included under the Remote Customer Assistance Service for example:

- Training of (new) staff on business processes or ITV software via telephone
- Planning and assistance with SynergySoft upgrades or where your network administrator needs advice and guidance.
- Assisting customers to implement new functionality
- Modifying reports or producing new (simple) reports e.g. Crystal Report templates for Summarised Receipts
- Advising and assisting customers with balancing or changing data
- Planning and assisting with changes and upgrades to your network servers or PC's that involves SynergySoft database or client software components

Remote Customer Assistance is offered to our customers at a discounted rate.

The benefits of this service are as follows:

- Reduced cost when compared to an onsite visit by a Support Consultant
- Work can generally be scheduled and completed more quickly than an onsite visit
- Staff skills can be kept up to date and aspects of the software that may not have been previously used can be implemented

IT Vision Support staff may recommend instances where Remote Customer Assistance should be considered, but you can also contact Martin Bull, Ann Bull or Catherine Englund if you wish to take advantage of this service.



Training

IT Vision understands the significant investment Organisations make in training their staff. We ensure that your staff is able to gain the maximum benefit from any courses that they attend with IT Vision. An essential part of delivering the best training is providing the right resources and the right environment. Our professional training facilities in Perth provide the additional benefit of being offsite, removed from the day to day work related distractions that are typical when training is held onsite. We also welcome enquires from country-based clients who would like to host regional scheduled training sessions for themselves and other nearby clients.

Scheduled Training

A Training Schedule that contains a list of courses and workshops that are scheduled for the next 3 months is issued to all customers quarterly and is also available on our website via the following link:

<http://www.itvision.com.au/trainingschedule/> . Course Outlines for each of the courses on offer are also available from the same folder on our website or on request.

If you are interested in attending any of the listed courses, please complete a Registration form. A copy of the form is included on our website in the Training Schedule folder. Alternatively call Ann Bull on 9315 7000 or email ann.bull@itvision.com.au if you would like further information. Completed Registration Forms should be emailed or faxed back to Ann, who will issue you with a Booking Confirmation. This confirmation will contain final details about the upcoming course as well as a Map and instructions on how to get to the training facility.

As part of your Booking, lunch, morning and afternoon tea are included for full-day courses. Course Notes will also be provided at the start of each course. Printed Completion Certificates will be issued to all attendees at the end of each course.

Customised training

Customised training courses can be arranged if the standard courses listed in the IT Vision Training Schedule do not meet your particular needs. These are generally held at your offices and therefore may be more appropriate if you have 4 or more members of staff that wish to attend.

Online Training

IT Vision now offer a Web-Based training service that will allow us to present short training sessions to remote clients. It can also potentially be used to



- Provide product demonstrations online to remote customers and
- Investigate and resolve specific issues

This service is facilitated by a third-party Citrix software product named GoToMeeting.

GoToMeeting training sessions are ideal for conducting shorter training sessions of up to half a day.

On Line training may be either in a seminar style format or the controls can be handed over to participants to enable hands-on training. (When presented in a hands on format we recommend a maximum of 3 to 4 participants).

Typically sessions are conducted by an ITV support person and 1 (or possibly 2) customers. In this scenario the sessions will be initiated from IT Visions offices. The voice side will be managed by IT Vision initiating a telephone call.

The GoToMeeting service can however allow up to 25 people to be connected (in addition to the trainer), potentially allowing for several remote connections. In this scenario, the voice side will be managed by IT Vision initiating a conference session through BT Teleconferencing.

Webinar online training sessions

A webinar (web based seminar) is a web based session which enable IT Vision to deliver training and demonstrations online to multiple clients at one session. The duration of webinars is approximately 1.5 hours.

UP coming Webinar training sessions are be advertised on the IT Vision website <http://www.itvision.com.au>. Click on this link to find how to register for sessions and view frequently asked questions on webinars.

Regional group Training

Where staff from a number of organisations within the same regional area would like to attend a particular training session, IT Vision is able to arrange for the course to be held at a time and location that suits all those that are interested in attending. This is mainly used for informational training sessions, as hands-on training requires specific resources.



IT Vision User Group

Any IT Vision customer is entitled to apply to become an IT Vision User Group Member. Membership is granted to the organisation rather than individual users.

The IT Vision User Group Inc. is an Incorporated body whose aim is to further the common interests of its members. The Group currently meets on a bi-annual basis, although the Executive Committee meets more regularly. Some of the important achievements that the Group has previously had include:

- the successful negotiation of a Service Level Agreement with IT Vision,
- the successful negotiation of an Escrow Agreement with IT Vision
- the instigation of annual Customer Satisfaction Surveys (which commenced in February 2003) and
- the annual IT Vision User Group Conference

The IT Vision User Group is responsible for reviewing Development Requests and assisting with the priority of Development work.

More information about the IT Vision User Group and instructions on how to join are included on our website and can be accessed by logging in, then selecting the User Group folder (from the folder list on the left hand side of the screen).



IT Vision contact details

Perth office (08) 9315 7000
Fax (Perth) (08) 9315 7088

Training Contact

For information about:
Perth or Regional based Group training or
Ann Bull – Training Coordinator
ann.bull@itvision.com.au

For Crystal Reports training, please contact:
Caroline Smith at CSG via email
Caroline.Smith@csq.com.au or phone
(08) 6250 7900

Support Contact

For information about:
Customised training
Implementation of new Software or
Issues with Support Service Levels, please contact:
Catherine Englund – Support Manager
catherine.englund@itvision.com.au

Sales Contact

Martin Bull - Business Development Manager
sales@itvision.com.au

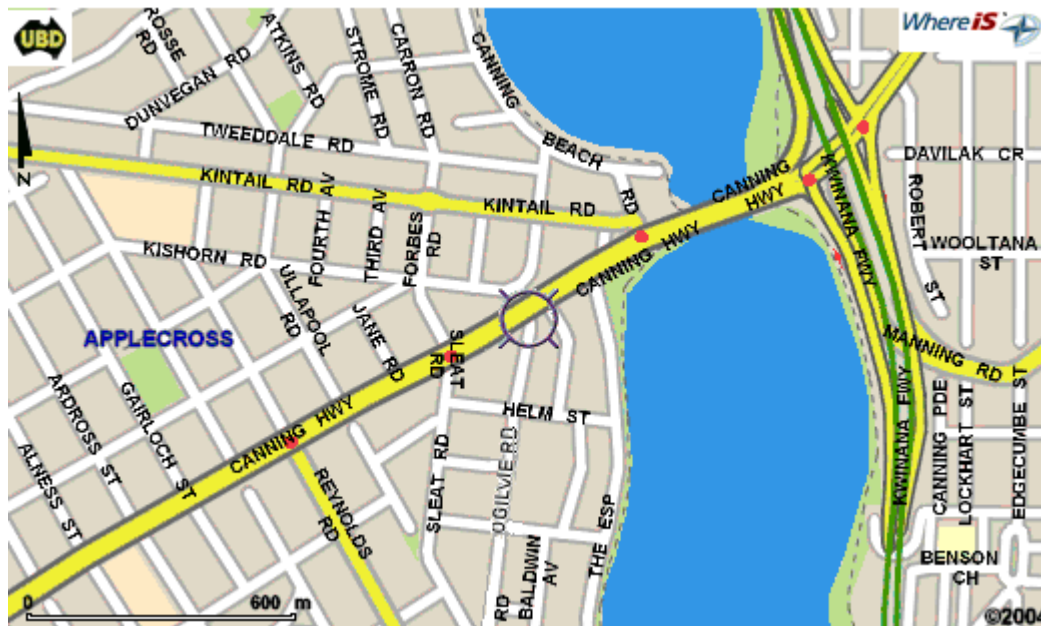


Where to Find Us

IT Vision's offices are at the Kirin Centre - Level 3, 15 Ogilvie Road, Applecross.

Directions:

From the Kwinana Freeway take the Canning Highway exit towards Fremantle. From Canning Highway turn left into Ogilvie Road (third street on the left). The turn off to Ogilvie Road is immediately before the footbridge over Canning Highway.



Parking

Paid parking is available directly in front of the Kirin Centre (on Ogilvie Road). Free parking may also be available on the day. On arrival please come up to our offices where you will be advised about current parking arrangements.

Recommended Reading

Customer Support website User Guide - <http://www.itvision.com.au/itvsupport>

Service Level Agreement - <http://www.itvision.com.au/usergroup/sla/SLA.pdf>