

MS ACCESS TO MS SQL SERVER MIGRATION SERVICES GUIDE

Making the Move
to a Three-tier Client/Server
Operating Environment

June 1998

Expert Software Services Pty Ltd

A.C.N. 054 141 365

2nd Floor • 326 William Street • Melbourne Victoria 3000 • Australia

Web: <http://www.expert.com.au> • E-mail: info@expert.com.au

Tel: +61 3 9320 6100 • Fax: +61 3 9320 6111

DISCLAIMER

INFORMATION PROVIDED IN THIS DOCUMENT IS PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND FREEDOM FROM INFRINGEMENT. The user assumes the entire risk as to the accuracy and the use of this document.

Information in this document is subject to change without notice. You may make copies of this document only for internal distribution within your organisation, but you may not modify or distribute this document to anyone outside of your internal organisation.

Expert Software Services may have patents or pending patent applications trademarks, copyrights, or other intellectual property rights covering subject matter in this document. The furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property rights except as expressly provided in any written license agreement from Expert Software Services.

©1998 Expert Software Services. All rights reserved.

Microsoft, MS, and MS-DOS are registered trademarks and Windows is a trademark of Microsoft Corporation.

DOCUMENT HISTORY

Release Date: June 1998

Document Version: 1.0

Document Name: Access-SQL Migration Services.doc

FEEDBACK

Your feedback is crucial for each new version of this guide

This is version 1.0 of what will likely be future releases of this services guide. Each version is improved based on your experiences. Please send your suggestions and comments to info@expert.com.au.

C O N T E N T S

1. EXPERT SOFTWARE SERVICES OVERVIEW	5
1.1 Key Benefits	6
1.2 Professional Services	6
1.3 Microsoft Solutions Platform	8
1.4 Migration Services Centre of Expertise	11
1.5 Environmental Assessment	11
1.6 Strategic Alliance Partnerships	11
2. MIGRATION RATIONALE	12
2.1 Moving to a Distributed Client/Server Environment	12
2.2 Moving to a Standard Desktop Environment	13
2.3 Moving to a Standard LAN/WAN Environment	14
2.4 Internet/Intranet Enabling Your Applications	14
2.5 Designing and Planning E-business Solutions	16
2.6 Getting Ready to Build Your Data Warehouse	19
2.7 A look at the enabling technology	21
2.8 Migration	21
2.9 Benefits of Migration	22
3. MIGRATION SERVICES	24
3.1 Migration Services Methodology	24
3.2 Migration Success	26
4. PROJECT MANAGEMENT	27
5. EDUCATION SERVICES	28

6. EXPERT CHOICE — SERVICES IN PARTNERSHIP	29
6.1 A New Way of Controlling Software Costs	29
6.2 Expert Choice — DataCare	30
6.3 Expert Choice — SoftCare	32
6.4 Telephone and E-Mail Support for Your Support Staff	33
6.5 It's Your Choice	33
7. ENVIRONMENTAL ASSESSMENT	34
7.1 Information Required	34
7.2 On Site Environmental Assessment	35
7.3 Environmental Assessment Results	35
7.4 The Next Step	36

1. EXPERT SOFTWARE SERVICES OVERVIEW

Expert Software Services is an Australian company providing business consulting and enterprise software solutions to meet the individual needs of its prestigious corporate and government clients. Our focus is on helping clients build new forms of business solutions and on applying technology more strategically. We design, develop, install, maintain and support a wide range of tailored enterprise solutions that permit seamless data transfer across multi-vendor platforms.

Today many organisations are looking to migrate their systems to the Windows NT platform and take advantage of the latest client/server, data warehousing, groupware and e-business technologies available from Microsoft. We are able to leverage our extensive experience on the IBM MVS mainframe, plus AS/400 and UNIX Oracle mid-range platforms, together with our in-depth knowledge of Microsoft products and technologies, to rapidly develop low cost, multi-platform, enterprise solutions.

Our client relationships often begin with project-based consulting services, evolving into systems development assignments and performance driven outsourcing contracts.

Our Microsoft SQL Server database management and administration experts are recognised as being amongst the best in Australia.

Our work with Internet and Intranet solutions gained us a place in the Winners Circle of Microsoft's worldwide Activate the Internet contest for 1996.



We also design, build, enhance and maintain mainframe (MVS) and mid-range (AS/400, UNIX) based systems.

Expert Software Services has strong alliances with other organisations skilled in the design, installation and on-going support of the hardware and communications platform required to implement our solutions. Thus, Expert Software Services can provide a wide range of total solution to a diverse range of clients.

Our philosophy, centred on quality of service and technical leadership, supported by a sound management infrastructure, has helped us to attain an enviable reputation in the marketplace. Our efforts to build a great company were recognised when Expert Software Services was selected as a finalist in the Telstra and Victorian Government Small Business Awards 1997.



1.1 Key Benefits

Expert Software Services uses a sound project management and support structure to ensure clear communications, regular reporting on project costs, budget and schedule control, strong project control plus quality control.

Expert Software Services offers the following key benefits to your organisation:

- **Knowledge & Understanding** — Our qualified professionals have in-depth experience in migrating Microsoft Access based applications into three-tier Microsoft SQL Server based solutions for many clients in a number of industries.
- **Professional Expertise** — The “*best in class*” expertise gained from providing quality IT solutions to organisations locally, nationally and internationally. The knowledge base built up over this period has resulted in the evolution of effective software engineering and management techniques. Lead times are minimal and translate into time and financial benefits for our clients.
- **Cost Effective Resources** — Our clients can utilise the mix of on-site and off-site resources that best meets their needs. This results in major savings for the client as the off-site development resources are seamlessly integrated with the on-site team through high-speed data and telecommunication lines. Our rates are competitive.
- **Infrastructure and Resources for Immediate Development** — With a resource pool of over thirty-five (35) highly qualified and trained software professionals, Expert Software Services is in a position to deploy technical resources at very short notice.
- **“The Expert Way”** — we use an accelerated approach to providing enterprise solutions which is a customised adaptation of the Microsoft Solutions Framework. This helps align business and technology objectives, reduce the lifecycle costs of using new and existing technology, and successfully implement both small and large scale projects. It’s a concise and focused approach supported by the latest technology to provide an early return on investment.
- **It’s Your Choice** — Our **Expert Choice** software maintenance and support service agreements deliver peace of mind. You determine the level of response required on a call by call basis. At all times you are totally in control of your support costs. You access the skills and knowledge of our software professionals at discounted rates and with guaranteed response times.

1.2 Professional Services

Expert Software Services can provide more assistance than others in the transition away from proprietary to open systems or out-of-date technology to current, tried and tested technology. Our Professional Services Portfolio consists of the following services that are available to our clients:

Consulting

- ☐ Business Process Re-engineering
- ☐ Organisational Design and Development
- ☐ IT Strategy and Planning
- ☐ Project Management
- Architecture and Design
- Benefits Management

Solution Engineering

- ☐ Enterprise Client/Server System Development
(*Microsoft, Oracle, IBM etc.*)
- ☐ Data Warehousing and Management Information Systems
(*Microsoft, Oracle, IBM, Business Objects, Seagate Crystal INFO etc.*)
- ☐ Database Engineering — design, administration, maintenance
(*Microsoft SQL Server, Oracle Server, IBM IMS/DB2 etc.*)
- ☐ Mainframe, Mid-range and Desktop systems development
- ☐ Groupware — Workflow and Collaborative Solutions
(*Microsoft Exchange, Internet technologies etc.*)
- ☐ E-business and Internet/Intranet Solutions
(*Microsoft, Oracle etc.*)
- ☐ Systems Integration
(*Desktop, Mid-range & Mainframe platforms*)

Implementation and Integration

- ☐ Installation
- ☐ Migration
- Project Management
- Education

Systems Support

- ☐ Tiered Systems Support
- ☐ Database Administration & Maintenance
- ☐ Multi-vendor Service management
- Self-Maintenance
- Software Support
- Help Desk

By combining our consulting, software services and project management expertise with the hardware, networking and communications skills of our various alliance partners, Expert Software Services can deliver whole system solutions.

All of the above services were developed to support the industry-specific requirements of our existing customer base in Australia and overseas.

1.3 Microsoft Solutions Platform

Expert Software Services is a leading developer of client/server applications using the full range of Microsoft Solutions Platform products to build enterprise solutions. We have proven expertise in producing homogeneous solutions that fully integrate with other systems running on a wide-variety of platforms (e.g. UNIX Oracle and MVS IMS).

Expert Software Services is one of the few Australian software development organisations to be selected as a **Microsoft Certified Solution Provider Partner** in recognition of its demonstrated expertise and commitment to providing outstanding business solutions based on Microsoft products and technologies.



1.3.1 Microsoft Product Expertise

The Microsoft client/server solutions we design, develop, implement and support use a combination of many Microsoft Solutions Platform products, including:

☐ **Languages**

Microsoft Visual Basic 4.0 or 5.0
Microsoft Visual C++ 4.2 or 5.0 (where multiple threads are required)
Microsoft Access 2.0/95/97, Access Basic, Visual Basic for Applications
Microsoft Visual J++, VBScript, JScript, HTML

☐ **Database**

Microsoft SQL Server 6.5
Microsoft Access 2.0/95/97

☐ **Communications & Workgroup**

Microsoft Outlook and Exchange

☐ **Operating Systems**

Microsoft Windows 95/3.1
Microsoft Windows NT Server/Workstation

☐ **Server Solutions**

Microsoft Transaction Server, Internet Information Server, Proxy Server,
Index Server, Systems Management Server, SNA Server, Exchange Server,
Site Server, Commerce Server

Our effective use of Microsoft's training and certification programme and participation in beta product evaluation and testing, ensures of people stay up-to-date with the latest Microsoft products and technologies.

1.3.2 Microsoft Client/Server Based Solutions

Expert Software Services also has proven experience with corporate and government clients in:

- ☐ Migrating Microsoft Access based databases to Microsoft SQL Server and retaining Microsoft Access for the client applications and/or migrating the client applications to Microsoft Visual Basic v4/5 and/or Microsoft Visual C++ v4.2/5.0;
- ☐ Migrating Microsoft Visual Basic and Microsoft Access based systems to Microsoft SQL Server while retaining Microsoft Visual Basic v4/5 for the client applications;
- ☐ Designing, developing, implementing and supporting three-tiered client/server solutions using Microsoft SQL Server together with Microsoft Visual Basic 4/5, Microsoft Visual C++ 4.2/5 and/or Microsoft Access 2/7/8; and
- ☐ Designing, developing, implementing and supporting client/server solutions using Active Server Pages, JScript, VBScript, Visual J++, Internet Information Server, Transaction Server, SQL Server, Site Server and Commerce Server to provide browser accessible client user interfaces.

Our skills in building solutions using Microsoft Visual C++ and Visual Basic v5.0 also enables us to build OLE and/or ActiveX controls which can be used to provide greater functionality in the user interface plus break the application into manageable, reusable components.

Our involvement in the full life cycle of many complex and mission-critical systems for our prestigious clients means you can be confident in our ability to deliver true end-to-end solutions.

1.3.3 SQL Server Expertise

Expert Software Services' people have been working with relational databases since their inception, and with Microsoft SQL Server since the early beta releases. We have designed, developed and installed a diverse range of SQL Server based client/server solutions at numerous organisations, including:

- ☐ BP Australia;
- ☐ Village Roadshow; and
- ☐ South East Water Limited.

We have gained considerable insight into a wide variety of configuration and troubleshooting issues. We have also assisted firms in the development of enterprise-wide deployment plans for client/server solutions, and have developed applications to take full advantage of the Microsoft Solutions Platform. **Expert Software Services knows the Microsoft SQL Server environment** and can advise you how to cost-effectively design, develop, install, maintain and support Microsoft SQL Server based client/server systems.

1.3.4 SQL Server Problem Solving

We have a proven track record in quickly resolving Microsoft SQL Server related issues. Recent clients for our problem solving skills have included:

- ☐ Wyndam City Council;
- ☐ Silvertown Ltd;
- ☐ Allied Pickfords Pty Ltd;
- ☐ OneLink;
- ☐ CSR Emoleum; and
- ☐ Harness Racing Victoria.

Our SQL Server experts are frequently referred into problem sites by Microsoft, other Microsoft Certified Solution Providers, and past clients to solve complex SQL Server and application issues. We have a 100% success rate in resolving such problems. Moreover, there have been many sites where other organisations have worked on the problems for months, only to then see our experts produce a solution in hours.

We believe Expert Software Services has the experience and successful track record to provide you with a cost-effective range of software services. We look forward to being given the opportunity to do so.

1.3.5 Microsoft Certified Professionals

We make good on our commitment to training and clear methodologies. The **Microsoft Certified Professional** programme ensures our software experts face up to the challenge of keeping up with industry advances so as to be able to maximise the potential of new technologies. Plus, they provide a reliable way to indicate to you that our experts have current — and validated — technical skills and expertise.



The bottom line is that when we undertake a software project using Microsoft products, you can be confident that the people used have proven experience with Microsoft products and have met Microsoft's high standards for technical proficiency.

More than 65 per cent of our team have qualified as *Microsoft Certified Product Specialists* (MCPS) by proving their understanding of Windows 32-bit architecture, OLE, GUI design and Windows Open Services Architecture components.

Many have already gone on to qualify as *Microsoft Certified Solution Developers* (MCSD) which proves they have the skills necessary to design and develop custom business solutions based on the Microsoft Solutions Platform.

Our clients appreciate the improved services, increased productivity and greater technical competency delivered because of the investment we make in the training and development of our people.

1.4 Migration Services Centre of Expertise

Expert Software Services has established a Centre of Expertise specifically for our Migration Services. This Centre of Expertise is staffed with our Migration Consultants who have the background and expertise to successfully assist you in migrating to a new platform.

1.5 Environmental Assessment

As part of their support offering, the Expert Software Services Migration Consultants offer an *Environmental Assessment*.

The purpose of the Environmental Assessment is to provide you guidance in developing a clear picture of your current information processing environment. The existing hardware and software environments must be quantified and assessed, and their related business functions must be identified and documented.

This will involve a detailed technical evaluation of current applications and platforms to be considered for migration and a recommendation to commence a migration activity or consider an alternative solution (i.e. re-engineered application).

The *Environmental Assessment* will be offered as a billable service. You may receive a rebate on this fee to apply towards additional services should you proceed with the migration with Expert Software Services.

1.6 Strategic Alliance Partnerships

Expert Software Services has established strategic relationships with the following industry leaders:

Name	Relationship	Type of Tools
Microsoft	Microsoft Certified Solutions Provider Partner	SQL Server, Access, Office, Visual Basic, Visual C++, Exchange/Outlook, BackOffice, Windows 95, Windows NT etc.
Oracle	Oracle Business Alliance Programme Member	Oracle workgroup and mid-range server solutions, PL/SQL, Pro*C, Designer 2000, Developer 2000 etc.
Executive Computing / Business Objects	Strategic Alliance	Business Objects integrated query, reporting and OLAP solutions.

2. MIGRATION RATIONALE

2.1 Moving to a Distributed Client/Server Environment

The move to distributed client/server solutions is well under way. For some organisations it's a way to scale, upgrade or make Year 2000 compliant their existing desktop database applications. For others it's a simple way to free up data trapped in legacy mainframe systems. And for some, it's just part and parcel of standardising their desktop and LAN/WAN environments.

Many forward thinking organisations realise that migrating to a distributed client/server platform is a move towards increasing productivity, reducing time to market, and linking people both internally and externally using new Internet and intranet technologies.

Moving your to a client/server solution using Microsoft SQL Server for some organisations is often step one towards creating an effective data warehouse.

Whatever your reason, you can be confident that Expert Software Services is here to help.

2.1.1 Moving from a Microsoft Access Environment

There can be no underestimating the impact desktop database solutions such as Microsoft Access, Microsoft FoxPro, dBASE, Btrieve etc. have had in organisations small and large. Indeed, many of these desktop database solutions have been scaled into multi-user solutions as the host organisation has grown. However, in many cases the success of these applications has also highlighted the deficiencies of desktop database environments.

The lack of performance, reliability and capacity of desktop database solutions in many situations has often fuelled the push to distributed client/server solutions. Expert Software Services has helped many organisations migrate their desktop database systems to three-tier client/server and distributed client/server solutions using Microsoft SQL Server for the database engine and Microsoft Visual Basic, Visual C++ or Access for the client applications.

2.1.2 Moving from Mainframe Environments

As the push for distributed computing is under way, many organisations have their business critical applications and data trapped on mainframe computers. In some environments, this legacy data has been stored on mainframes for many years with proprietary software applications. Most of the applications use hierarchical databases.

Organisations locked into mainframe environments lack the flexibility to change their business critical applications to stay competitive in their marketplace. With IS budgets tied up supporting the mainframe, organisations are limited in their flexibility to employ industry standard applications and productivity enhancing solutions on the latest technological product platforms.

As a result, organisations on proprietary systems are searching for alternative solutions that will give them a competitive edge in their marketplace. Expert Software Services is committed to helping customers achieve this objective.

Expert Software Services, through its extensive experience designing, developing, installing, maintaining and supporting large mainframe systems, can often preserve the existing investment in software by migrating applications from the existing mainframe platform to a distributed client/server environment.

2.2 Moving to a Standard Desktop Environment

Since the introduction of the IBM PC standard for personal computers in August 1981 we have seen huge advancements in productivity tools for office workers. The most popular operating environment and desktop applications have changed greatly over the years — e.g. from MS-DOS based Lotus 1-2-3 and MultiMate to the Microsoft Windows based MS Excel and MS Word.

Currently most organisations are standardised on either Microsoft's Windows 95 or Microsoft Windows NT Workstation v4 for their 32-bit desktop operating environment. The choice of desktop applications varies with the Microsoft Office suite currently a clear leader. Microsoft Exchange and Lotus Notes are the most common choices for providing an electronic mail and groupware solutions. Netscape Navigator and Microsoft Internet Explorer are the two most common Internet web browsers in most organisations.

By the year 2000 many organisations will have, by one means or another, changed to a 32-bit desktop operating environment. Microsoft Windows NT Workstation v5 is the most likely marketplace leader, with Microsoft Windows 98 also being selected by some organisations.

Along with the new 32-bit operating environments comes new or updated applications designed to exploit their power and features. Many corporate and government organisations have already migrated to Microsoft Office over the last few years and are now likely to migrate to using Microsoft BackOffice to deliver an integrated suite of enterprise and department client/server and collaborative solutions.

Combined with this change to the operating environment is the trend to integrate the communications benefits of LANs and WANs into the standard desktop environment.

As a result of these changes, all organisations are wondering how best to manage the migration to a standard desktop environment that delivers the benefits available at minimum cost and risk. Expert Software Services can advise on how best to achieve this objective.

Expert Software Services can often preserve the existing investment in software and staff skills by migrating applications from the existing desktop platform to a new environment. Existing macros can be migrated to the new applications. Training courses are tailored to the needs of your people by taking into account their existing knowledge base.

2.3 Moving to a Standard LAN/WAN Environment

Many corporate and government organisations have many network operating systems, network management tools, remote access tools etc. in use today.

Today the most common Network Operating System (NOS) in use in Australian corporate and government organisations is still Novell NetWare v3.x., even though Novell are no longer making functional changes to this NOS. However, many organisations have chosen to bypass Novell NetWare v4.x and v5.x. Instead they've been migrating to a new NOS environment — Microsoft Windows NT Server. This change is being driven by the large range of application server products and off-the-shelf client/server solutions that require Microsoft Windows NT Server.

New applications are constantly increasing the traffic on existing LAN/WAN systems. Manufacturers are addressing the problem with a wide range of solutions — ATM, switching, fibre-optics, 100Mbit/sec cards etc. Unfortunately, in the rush to solve specific problems at one site, often solutions are chosen that are not scalable.

As a result, organisations are searching for alternative NOS solutions that will give them a competitive edge in their marketplace. By standardising the LAN/WAN environment across the organisation they are able to benefit from greatly reduced network management and support costs. People are free to move around the organisation and have network access anytime, anywhere using common tools. Expert Software Services is committed to helping customers achieve this objective.

Expert Software Services can help you to preserve your existing investment in LAN/WAN technology as you move to a standard LAN/WAN platform that is ready for today and tomorrow.

2.4 Internet/Intranet Enabling Your Applications

The World Wide Web can give you powerful new options for solving specific business issues, such as increasing productivity, reducing time to market, and linking people both internally and externally. Yet this new world is fraught with applications development challenges. Expert Software Services offers an Internet Applications Development Planning service designed to help ensure that your Internet-related applications meet your business goals.

2.4.1 Capitalising on the promise of the Internet

The Internet can not only extend the reach of your organisation globally, but also make it more effective internally. By simplifying and expediting the process of disseminating information, an internal intranet can put everyone in your organisation “on the same page.” That can boost your productivity, improve communications, increase efficiency, and produce shorter time-to-market cycles and other competitive advantages.

Yet these advantages bring their own set of development and business issues. How do you ensure the security of corporate data? What's the best way to integrate Internet

applications with legacy systems and your IT infrastructure? How do you support changes to applications?

2.4.2 The benefits of a disciplined approach to Internet applications development

Expert Software Services offers a planning service for Internet/intranet applications development designed to help you develop world-class Internet line-of business applications based upon Microsoft products. This service shows you how to develop Internet-related applications that meet high standards of quality, reliability, ease of use, ease of maintenance, extensibility, and scalability as usage grows—all while meeting your business objectives. These are the fundamental elements of effective distributed computing applications.

Our planning service emphasises a disciplined approach to applications development that draws on the proven development techniques that are part of “*The Expert Way*” methodology and tools. This approach helps you build and maintain applications that are potent enough to meet today’s needs and flexible enough to meet tomorrow’s.

2.4.3 The skills to help ensure a successful Internet or intranet implementation

Expert Software Services provides focused information technology services to users of client/server technology in mission-critical systems. In addition to its custom services, Expert Software Services offers an expanding set of predefined consulting services.

Each predefined service delivers a consistent framework of best practices, together with the skills and knowledge required to achieve a specific set of technology objectives — in this instance, planning Internet/intranet applications development.

By combining well-defined processes based on worldwide experience with a focus on your unique environment, Expert Software Services offers you a tremendous opportunity to plan an infrastructure that both satisfies user expectations and meets your organisational needs for order, control, and cost containment.

2.4.4 Our best practices help ensure your success

Organisation and process, not just technology, are critical to the successful planning of an Internet or intranet infrastructure. Our planning service provides the critical first steps of organisation and process. It is designed to be one part of the overall plan-build-manage process.

The Expert Software Services Internet/Intranet Applications Planning service addresses a number of critical technical issues that need to be considered when developing Internet-related applications. These issues include:

- ☐ Integration with existing environments.
- ☐ Applications architecture and design.
- ☐ Selection of products and tools.
- ☐ Security.

- ☐ Standards compliance.
- ☐ Performance and capacity.

The service provides you with several specific planning documents, including:

- ☐ A Development Plan for approaching your overall Internet applications development.
- ☐ A Configuration Plan with recommendations for ways to structure your development.
- ☐ A Testing and Acceptance Plan, which outlines the methodologies you can use to validate your applications.
- ☐ A Training Plan, which details how to train users on your new Internet-related applications.
- ☐ An Implementation Plan with details on system development and staging, pilots, and deployment.

2.4.5 Expert Software Services people make the difference

The right combination of people can make or break Internet and intranet applications development. Expert Software Services people are experts in Microsoft technology and bring many years of industry experience to your project. Working closely with your staff, Expert Software Services emphasises knowledge transfer: working closely with other project members to empower them with expertise in Microsoft Internet/intranet technology.

The right tools, the right people, and the right plan. This powerful combination of resources can help ensure Internet/intranet applications that build on your competitive strengths and assets.

2.5 Designing and Planning E-business Solutions

The ability to conduct secure transactions across the Internet gives you instant access to a worldwide market of buyers for your products and services. It's a strategic shift in how commerce occurs, and competitive advantage goes to the first organisations to take advantage of this opportunity. Expert Software Services Consulting Services shows how to plan for this new capability, using proven best practices.

2.5.1 An important window of opportunity

In virtually any business, the Internet changes the rules of competition by bringing buyers and sellers closer together. The Internet is large enough and widespread commerce on it is so widely anticipated that it is hard to imagine an organisation or its customers remaining unaffected by the arrival of the Internet as the primary means of conducting transactions.

The question is, how will you be affected? Now is an excellent time to ensure that the rules of competition are changed in your favour. Organisations that follow behind you

must then react not only to the Internet but also to your established market position within it.

2.5.2 Invest in planning to reduce risk — and surprises

Expert Software Services understands that taking a leadership position in a new area requires a detailed understanding of issues that may not have been widely addressed yet. With careful planning, you will be able to deliver all of these functions in an Internet commerce environment:

- ☐ Merchandising.
- ☐ Customer support.
- ☐ Order fulfilment, including international product restrictions, taxation and shipping.
- ☐ Collections and returns.

To enable these business functions, you need to be able to make technical decisions about issues that typically are not present in the design of static Web pages. These include:

- ☐ Internet infrastructure and secure financial transactions.
- ☐ Database design, catalogue searching, and Internet applications development.
- ☐ Integration with legacy order fulfilment systems for inventory control, taxation and shipping.
- ☐ Graphical content creation, management, and localisation (multiple language support).
- ☐ Replication of content, orders and merchant server supporting data.
- ☐ Automated confirmation of order receipt and processing.

You should also consider whether to outsource the development and management of the final solution.

Expert Software Services can help. Making the right investment in Internet commerce planning — long before the first software is ever set up — can reap significant rewards. Each large organisation has unique complexities, legacy systems, and business requirements. Expert Software Services can help you build an effective plan tailored to your environment by recommending the tools, processes, and teams that will help provide a successful implementation in your organisation.

2.5.3 Our best practices help you achieve success

Expert Software Services provides focused IT services to users of Microsoft technology in mission-critical systems. In addition to custom consulting, Expert Software Services offers an expanding set of predefined consulting services. Each predefined service delivers a consistent framework of best practices, together with the skills and knowledge required to achieve a specific objective — in this instance, planning and designing an Internet-based commerce solution.

By combining well-defined processes based on a wide experience with a focus on your unique environment, Expert Software Services offers you a tremendous opportunity to rely on established best practices while capturing a lead in the emerging area of Internet commerce.

2.5.4 What you can expect from this consulting service

Internet commerce planning includes analysis and recommendations for each of the following:

- ☐ Business needs and the Internet applications that can best address those needs, including functions such as merchandising, order fulfilment, collections, and customer support.
- ☐ Solution design and technology requirements, including design for secure transactions, database searching, replication, order receipt and processing, and integration with existing systems.
- ☐ Proposed products and technologies.
- ☐ Team roles, responsibilities, and resource requirements.
- ☐ Processes used to manage project implementation.
- ☐ Effort and cost implications for each project phase.

At the end of this service—which, depending on the size and complexity of your organisation, may take from three to eight weeks or longer—you receive the following deliverables:

Project plan	Describes projects from business, technical, applications, and implementation perspectives
Internet commerce vision/scope	Clearly articulates the goals and extent of each project
Internet commerce technology specification	Identifies business and technical requirements, including proposed products and technologies
Test, pilot, and deployment plan	Describes tasks needed to complete testing, pilots and enterprise-wide implementation
Tools, templates, and samples	Provide a comprehensive and customised collection of tools, templates, and sample documents to ensure repeatable success

This service equips you with the detail necessary to make the right decisions about how to best proceed with development and deployment before you use significant resources:

- ☐ Develop and deploy effective Internet commerce applications using your own staff, knowing that the right resources are deployed on the most appropriate activities.
- ☐ Rely on Expert Software Services for development and deployment, confident that the up-front planning has been done thoroughly.

- Engage Expert Software Services as consultants to oversee the development and deployment.

2.5.5 The right tools and people can make all the difference

Your choice of the right tools can dramatically simplify and speed up the process of getting Internet commerce solutions up and running. This service focuses on two Microsoft tools:

Microsoft Internet Information Server (IIS) is optimised for the Microsoft Windows NT Server operating system, delivering high performance, excellent security, and ease of management.

Commerce Server includes a built-in order-processing pipeline and allows you to easily build high-impact Internet stores from templates you create, generate custom Web pages on the fly, and develop targeted dynamic sales promotions based on real-time information. Interfaces make it easy to integrate with your existing legacy systems and with third-party components.

Expert Software Services consultants bring years of industry experience to your project. Working closely with your staff, they actively transfer knowledge to other project members throughout the project.

2.6 Getting Ready to Build Your Data Warehouse

Moving your desktop database applications to a client/server solution using Microsoft SQL Server for some organisations is often step one towards creating an effective data warehouse. The idea behind data warehousing is simple: get all your data working together so you can see more, learn more, and make your organization work better. While often highly effective, this type of project requires a comprehensive understanding of data management, systems architecture, and technology capabilities.

2.6.1 Start with what you have

Customers considering data warehouses or data marts typically start with a wide range of data types, formats, and architectures. Needs for this data may range from data transformation and statistical analysis to data mining and visualisation. Whatever the starting point or the driving need for the project, successful data warehousing requires significant architectural, design, and deployment planning.

Expert Software Services provides a comprehensive range of consulting service for architecting, designing, and planning deployment of a data warehouse solution based on Microsoft and service partner technologies. Our consulting services are designed to reduce both implementation time and total cost of ownership, build on the skills and best practices of our experienced professionals, and fully utilise our history on successful past projects.

2.6.2 What data warehousing can offer your organisation

Data warehousing can involve centralising a variety of data sources using Microsoft SQL Server or extending the value of a central repository by doing more with the stored data. Situations in which data warehousing is applicable include:

Data Transformation. Stored data from one business application are transformed and output according to a set of predefined rules to accomplish a secondary purpose, such as better integration with another system.

Statistical Analysis. Stored data are sifted through in search of patterns that may indicate the development of new trends or activities. This analysis is useful for the creation of program or policy changes that adapt the organisation to take advantage of these events.

Data Mining. A sophisticated variation sifting through stored data, data mining uses complex searches on large volumes of data to explore and identify relationships between variables that were previously thought to be independent. This allows organisations to more effectively manage cause-and-effect relationships and the anticipated results of policy or program changes.

Visualisation. In many cases, data can be more effectively understood if the numbers are combined in useful ways presented visually, as live or historical charts and graphs. Visualisation can be especially useful in quickly identifying which data areas to target for additional analysis.

2.6.3 Is data warehousing right for your situation?

The value of a data warehouse or data mart extends across a variety of departments and areas of ownership within an organisation. As such, there are at least three conditions that must be present for data warehousing to succeed:

Business units have access to and understand the relevant business data. Effective searching of centralised data is dependent upon accurate data collection. Intelligent use of the information gleaned from centralised data analysis is dependent upon an understanding of how that information applies in a business context.

Data models are understood. Fundamental concepts like “what is a customer?” (i.e., a name, a location, an ID number, etc.) need to be resolved across all intended data sources before they can be functionally integrated.

Willingness of central IT to part with data. A key concept in data warehousing is the immediate use of relevant corporate data by those business units most able to achieve value from it. If the information systems department requires heavy involvement in either data input or data output, then the advantages of timeliness and ease of access are lost. Rather, the central information technology group needs to manage the data *integrity*, not the data.

If any of these prerequisites are not yet in place, Expert Software Services can help your organisation address these long-term issues through the application of “*The Expert Way*” methodologies and tools.

2.6.4 Our best practices help ensure your success

Our Consulting and Migration services are the result of documented technology, organisation, and process that have been successful in other planning or deployment projects. This service, which provides the critical first steps of organisation and process, is one part of the overall plan-build-manage process. It includes:

- ☐ A needs assessment report
- ☐ A technology assessment report
- ☐ Architecture and design documents
- ☐ A facilitated design review and results summary
- ☐ A proof of concept for data warehousing with Microsoft SQL Server
- ☐ A plan and recommendations for pilot implementation and deployment
- ☐ Implementation tools (including Schema Builder and Data Loader)

Expert Software Services can then work with your IT staff to successfully implement your data warehousing solution.

2.7 A look at the enabling technology

Microsoft offers key strategic technologies to help you implement a distributed client/server solution.

The Microsoft BackOffice family. This set of application services, running on the Microsoft Windows NT Server network operating system, provides the security and reliability necessary for high-volume data processing.

Implementation tools. Tools developed by Microsoft and its service partners help you build a star schema, load data into the data warehouse, create visual reports, and link this visual output to an intranet or the Internet.

2.8 Migration

Migration is defined as the process of moving from one environment to another. In the information processing sense, migration is the process of moving programs and data from one computing environment to another. This change may be major or minor and may be undertaken for a multitude of reasons. The desire to migrate is usually brought on by a requirement to a change in business environment.

Migration is crucial to the evolution of technology for organisations who desire to remain competitive in their marketplace. Organisations who do not adopt new technologies in a

timely fashion are at risk of falling behind the competition while becoming less productive and less capable.

Expert Software Services seeks to become your partner of choice to help your organisation get closer to their customers by applying next generation computing technologies. Organisations employing the latest technology will not only become closer to their customers, but they will also realise the following benefits of migration:

1. Availability of low-cost hardware
2. Lower maintenance costs
3. Reduced information systems management costs
4. Protection of existing software investments
5. Accessibility to low cost, high productivity software

2.9 Benefits of Migration

2.9.1 Availability of Low Cost Hardware

The cost of enterprise size computer technology has come down tremendously in the last few years. The popularity of the PC has made systems based on the Intel chip so common that the PC is now marketed as a commodity. Those conditions combined with advances in operating system technology have made it possible for organisations to move their business critical applications from the mainframe to a client/server architecture.

2.9.2 Lower Maintenance Costs

Along with the reduction in hardware costs is the reduction in service costs. Yearly maintenance expenses have traditionally been at 10% to 15% of the original hardware costs. In some situations the yearly maintenance costs are so high the cost of the migration has been recovered within a year.

2.9.3 Reduced Information Systems Management Costs

In the past, companies needed a complex IT organisation with a costly and complicated telecommunications infrastructure to support a large number of users in different locations. With the technological advances in hardware, software and communications networks, end users are much more independent.

2.9.4 Protection of Existing Software Investments

Many organisations have invested heavily in developing and maintaining their own in-house, business critical software applications. A migration strategy can be developed to enable these organisations to further extend the life of this expensive software thus, amortise the total cost over several more years.

2.9.5 Accessibility To Low Cost, High Productivity Software

Technological advances have driven the availability of low cost, high productivity enhancing software. However, the significant majority of this software is only available on Microsoft Windows and Windows NT based PCs. Migration to a standard desktop and LAN/WAN environment can maintain the organisation's existing investment while at the same time allowing the organisation to implement productivity enhancing solutions with the new environment.

3. MIGRATION SERVICES

Expert Software Services has developed a world class migration services methodology to be used when migrating organisations to open systems and/or standard desktop and LAN/WAN environments.

This Migration Service methodology provides a framework for assessing the current environment. Specifically, the methodology provides a standard process for Expert Software Services to do the following:

- ☐ Define migration scenarios based on the organisations needs, goals and objectives
- ☐ Select a migration scenario and demonstrate its viability
- ☐ Create a migration plan from the clients current environment to a new environment
- ☐ Execute the migration plan

3.1 Migration Services Methodology

3.1.1 Phase 1: Assess Current Environment

The *Environmental Assessment* is the first order of business for any project. During the assessment stage questions of scope and size are key. It is during this stage that the target platform and the overall technical goals must be discussed in depth.

During the *Environment Assessment* phase activities focus on purely technical feasibility. Informal and formal reviews include, but are not limited to, the existing documentation, environment, configuration management and human resources.

3.1.2 Phase 2: Define Migration Scenarios

Phase 2 of the migration methodology is to define migration scenarios that will meet customer requirements. The driving issues and goals behind any migration effort must have enough substance and merit to sustain the project to a successful conclusion.

In today's economy and business climate, the sustaining issues for migration will rarely be based solely on computer technology. The most durable and sustaining drivers are those based on sound economics, that is:

- ☐ improvements in the bottom line;
- ☐ measurable short-term and long-term payback;
- ☐ measurable improvements in competitiveness; and
- ☐ improved productivity.

In this phase, Expert Software Services' role is to identify, document and highlight the possible migration scenarios that will maximise your objectives.

3.1.3 Phase 3: Select Preferred Migration Scenario

Each migration scenario developed in phase 2 represents a potential migration synopsis for the organisation. Phase 3 selects one of the developed migration scenarios based on the organisation's strategies, short-range and long-range plans and hardware and software requirements.

The high level migration plans are compared against the organisation's defined criteria. The migration planning team (made up of Expert Software Services and client associates) selects a preferred scenario and obtains approval from the Management Review Committee to proceed.

Upon completion of this phase, there is specific and concrete information about project size, scope, training requirements and organisation impact.

3.1.4 Phase 4: Create Functional Migration Plan

Based on the concepts outlined in the migration scenario selected in Phase 3, Phase 4 translates the preferred migration scenario into a detailed, functional migration plan. A Expert Software Services Project Manager should be assigned to manage the project jointly with a customer appointed Project Manager.

Although the assigned Project Managers have overall responsibility for creating and managing the functional migration plan, they may or may not be the subject matter experts contributing technical expertise to the migration project. Therefore a strong linkage must be created between the subject matter expert(s) and the Project Managers early in the process. The required roles and skill sets required for successful completion of the project must be defined by the subject matter expert(s) and communicated to the Project Managers.

Questions of corporate strategy will arise. What is the corporate strategy? How do we support our customers using the existing technology? How do we manage multiple platforms? Where are ongoing software updates to be made? How do they fit in? Who gets training? How do we handle all the training needed?

The activities of Phase 4 deals with the human resources, software resources, hardware resources and many other common project planning items.

The specific deliverable's of this stage will be a formal project schedule, the resource requirements and the beginning of involvement for critical IT staff from the customer. Expert Software Services firmly believes that the customer must be involved in developing the migration plan if they are going to be committed to the project. When the migration is complete the customer will be delighted with the results and take ownership of the new environment.

3.1.5 Phase 5: Execute the Plan

During Phase 5, the physical migration is performed. In this stage, some re-engineering of specific applications are performed and new technology can be introduced. After

completion of this final stage, all technical differences between the original environment and the new environment have been uncovered and solved. However, the paradigm shift required by staff has just begun.

Throughout this phase, the migration team focuses on implementing the migration plan within budget and on schedule. The result of Phase 5 is the baseline solution. The customers organisation operates under the new environment immediately.

3.2 Migration Success

To ensure that the migration is a success, there are two areas which must be effectively addressed. Those two areas are Validation of the migration and Transition of the new environment to the client.

3.2.1 Validation

Validation is essential. If used effectively, it provides the most significant reduction in the cost of delivering the project. Remember, in migration, the final deliverable exists before the project was begun. When used as a leverage, test and validation can be exploited through the entire project.

The focus in *Validation* is creating a Test Solution. This Test Solution should be a solution which tests every feature/function area of the new environment.

The goal of the Validation is for the new solution to be operating with the end users trying it, working with it and using it.

3.2.2 Transition

The final stage is *Transition*. At the beginning of this stage the new environment is running. At the end of this stage, you will have a true solution.

Activities in the *Transition* stage focus on performance, look and feel of the new environment.

4. PROJECT MANAGEMENT

Project management is best defined as the process of managing and directing personnel, time and material resources to satisfy customer expectations and meet technical performance, schedule and cost requirements. Expert Software Services project management focuses on customer satisfaction through the orderly, effective and efficient completion of projects that solve customer business problems.

As described in Phase 4 of the migration methodology, an Expert Software Services Project Manager should be assigned to jointly manage the migration project. The responsibilities our project managers perform are critical to ensuring that information technology projects are completed on time and within budget — and that they delight our customers.

More and more companies today are out-sourcing the project management activities because they do not have the in-house expertise to manage such complex projects. In addition, organisations are looking for project managers who not only know the technology, but also have knowledge of their industry and business requirements.

With Expert Software Services' focus on industry-specific targeted opportunities, our project managers are equipped with the industry and business knowledge that meet our customer's expectations.

In addition our Expert Software Services Project Managers not only achieve the goals of each project, but also exceed the exacting standards set by our customers. In doing so, they manage and marshal numerous activities and resources — which can include the full resources of Expert Software Services and our strategic partners, if needed.

5. EDUCATION SERVICES

No migration solution is successful until your staff are confident in the use of your new solutions. Only when your people know how to make the technology work for them can they use it to their advantage. They can then focus on what needs to be done, instead of how to do it.

Expert Software Services recognises this and makes the training of your staff a key element of our migration solutions.

We put together tailored education programmes which provide your support and end-user staff with the skills they need, when they need it. Where possible, training is timed so that when your staff leave the classroom and return to their workplace, the new solutions are there, ready and waiting to be used.

6. EXPERT CHOICE — SERVICES IN PARTNERSHIP

The work doesn't stop once a Migration Plan has been successfully executed. All systems require ongoing support and maintenance. Having specialised in providing high quality software solutions across a wide range of platforms, Expert Software Services is a valuable partner for organisations seeking the maximum return from their software investment through improved software support and maintenance services.

6.1 A New Way of Controlling Software Costs

Expert Software Services is pleased to offer a single services agreement that lets you choose the software maintenance and support services you want whilst guaranteeing fast response and affordable service rates — **Expert Choice**.

Expert Choice is a software maintenance and support services agreement that lets your organisation access the skills and knowledge of our software professionals at discounted rates and with guaranteed response times. Charges are proportional to the skills required, and a single **Expert Choice** service agreement gives you access to all of our services.

The key benefit of an **Expert Choice** service agreement is that you the client can determine the level of response required on a call by call basis. At all times you are totally in control of your support costs.

From client/server software support to database administration and management, consulting services to systems development, **Expert Choice** offers:—

6.1.1 Special Professional Care

- ☐ Every contract client is given special care by experienced professionals ensuring both the initial response and all on-site service work.
- ☐ All contract clients receive a guaranteed **Fast Response** of one-hour or better response time.

6.1.2 Client Directed Response

- ☐ For pressing issues where **Fast Response** assistance is required, we will guarantee a skilled professional will be on-site resolving the problem during the next working day, or on-line using a remote connection (where appropriate) within 4 working hours.
- ☐ For issues requiring urgent **Priority Response** assistance a premium will guarantee an engineer will be on-site within 4 working hours, or on-line using a remote connection (where appropriate) within 2 working hours.
- ☐ Service outside normal business hours is available as required to support critical systems.

6.1.3 Flexibility in Function

- ☐ A single **Expert Choice** services agreement can be used for almost any skills related software task, including:
 - ☐ software fault finding and repair;
 - ☐ database maintenance and management;
 - ☐ administration of your database server;
 - ☐ the design, upgrade, maintenance and support of your applications; and
 - ☐ consultation to enable effective strategic planning.
- ☐ You pick both the urgency and function of all work when you require it — not when your services agreement is signed.

6.1.4 Reduced Service Rates

- ☐ Regardless of the service chosen, you receive the same discount level on all services. The greater the value of the **Expert Choice** services agreement, the larger the discount offered.

6.1.5 Fairness in Operation

- ☐ You pay for the level of response and the time you actually require.
- ☐ Monitoring and comprehensive monthly reporting of all services and charges for easy verification of service and correctness of charges.

6.1.6 A Meaningful Guarantee

- ☐ Expert Software Services is prepared to honour the terms and conditions of an **Expert Choice** service agreement. Should we be unable to meet our response obligations, you will receive the required service for free.

6.2 Expert Choice — DataCare

The mission of our **DataCare** service is to ensure the productivity and accuracy of your data systems by providing efficient and high performance data systems. Our professional team has the expertise to handle the **data migration, data integration, data warehousing** and **data management** issues associated with distributed cross platform, enterprise systems.

DataCare is a key component of the **Expert Choice** profile. It is designed to meet the needs of our clients who realise that accurate, relevant and timely information is critical to the success of their business. Often these organisations are overwhelmed by the quantity and irrelevancy of the data produced from their existing business systems.

Expert Software Services can streamline your business systems using our specialist database design, implementation and management skills. Platforms and products supported include:

- ☐ Mainframe: **IMS, DB2, CICS**, Oracle, Adabas etc.
- ☐ Midrange: **Oracle Server, Microsoft SQL Server Enterprise** etc.
- ☐ Desktop: **Microsoft SQL Server**, Oracle Server, IBM DB2 etc.

Expert Software Services has extensive experience in developing database administration procedures and processes. We have installed, configured and tuned major database management system environments utilising IMS, DB2, Oracle and Microsoft SQL Server. We have integrated solutions with existing legacy systems including IMS, DB2, CICS, AS/400 and VSAM.

DataCare database management and administration services may be performed at either your site or, where appropriate, at Expert Software Services' offices. **DataCare** includes the provision of telephone assistance to your own support staff.

Our database administration and management professionals have extensive access to the technical resources of major manufacturers and distributors, as well as on-line services from around the world. We are able to support even the most complex of database environments. Our services include:

Database Server Support

- ☐ Database server fault identification and recovery.
- ☐ Installation and support of database servers.
- ☐ Management of database servers, diagnosis and correction of faults.
- ☐ Database server system upgrades.

Data Management

- ☐ Data security design and implementation..
- ☐ Verification of database server backup and data integrity.
- ☐ Identification and resolution of database server performance bottlenecks.
- ☐ Performance tuning of database servers etc.
- ☐ Projection of database server storage and CPU requirements.

Database Design and Technology Consulting

- ☐ Advice on emerging data storage and management technology.
- ☐ Design of transaction and relational databases.
- ☐ Specification of multi-database server, mixed host data environments.
- ☐ Database services auditing with security and performance evaluation.
- ☐ An assessment of your total database, systems or application environments.
- ☐ Project management so as to deliver benefits throughout a project's life-cycle.
- ☐ The design, implementation and management of disaster recovery strategies and plans.

With **DataCare**, your databases will become more reliable, more functional and more cost effective than you imagined they could be.

6.3 Expert Choice — SoftCare

SoftCare is a core element of the **Expert Choice** profile. It is designed to meet the basic needs of our clients for quality software application support and maintenance. Within these categories it can incorporate almost any software related service task.

The services may be performed at either your site or, where appropriate, at Expert Software Services' offices. **SoftCare** includes the provision of telephone assistance to your own software support staff.

Our expert analyst programmers have extensive experience in keeping mission critical, real-time system up and running. They are trained in how to carry out maintenance services with minimal disruption to operational systems. When added to the professional, courteous nature of our staff, Expert Software Services truly is a valuable friend.

We are able to provide software services for systems we've designed, developed and installed, or for your existing systems after a suitable hand-over period. **SoftCare** services include:

Software Application Support & Maintenance

- ☐ Software application fault identification and recovery.
- ☐ Software application user training and support.
- ☐ Identification and resolution of software application performance bottlenecks.
- ☐ Maintenance of system and user documentation for the software applications.

Software Administration

- ☐ Management of software applications, diagnosis and correction of faults.
- ☐ Maintenance of business rules in client/server application systems.
- ☐ Management of change control procedures.
- ☐ Software application auditing with security and performance evaluation.

Workstation Support

- ☐ Installation of additional and replacement client software applications.
- ☐ Installation and configuration of supported client applications on new or upgraded workstations.
- ☐ Performance tuning of client application workstations etc.
- ☐ Projection of workstation storage and CPU requirements.
- ☐ Diagnosis of incompatible, faulty, or unreliable client application software.

6.4 Telephone and E-Mail Support for Your Support Staff

You can raise low-priority background support issues at any time via the telephone or Internet e-mail (minimum charge 30 minutes).

Your staff can call for advise on software support and maintenance issues (minimum charge 30 minutes).

6.5 It's Your Choice

For **Fast Response** on normal issues, during business hours, we guarantee to have an experienced database administrator (**DataCare**) or analyst programmer (**SoftCare**) on the telephone within one working hour or, if required, on-line via a remote connection within 4 working hours, or on-site during the next working day.

For **Priority Response** on issues requiring urgent assistance, an additional premium of 30% will guarantee to have the same experienced professionals on the telephone within 30 minutes or, if required, on-line via a remote connection within 1 hour, on-site within 4 working hours.

Service outside normal business hours is available as required to support critical system components. An additional premium of 50% (**Extended Hours**) or 100% (**Overtime Hours**) is applied for services requested to be performed outside normal business hours.

At all times you are totally in control. We will respond as you direct us to.

7. ENVIRONMENTAL ASSESSMENT

The first step in undertaking a migration should be to carry out a comprehensive **Environmental Assessment**.

Expert Software Services Migration Consultants offer an **Environmental Assessment** the purpose of which is to provide you guidance in developing a clear picture of your current information processing environment. You may be entitled to receive a full or partial rebate on the **Environmental Assessment** fee to apply towards additional services should you proceed with the migration with Expert Software Services.

7.1 Information Required

The existing hardware and software environments must be quantified and assessed, and their related business functions must be identified and documented. Some information is required from your organisation in order to effectively assess your current environment. Expert Software Services working with your organisation needs to identify the following:

7.1.1 Physical Environment

An accurate picture of your current hardware, operating software and networked environment and document the following system details:

- ☐ CPU(s) and Operating System;
- ☐ Storage subsystems / Disks;
- ☐ Tape subsystems / Tapes;
- ☐ Printer subsystem / Printers;
- ☐ Personal Computers;
- ☐ Workstations;
- ☐ Terminals;
- ☐ Networking Software;
- ☐ Security; and
- ☐ Utilities.

7.1.2 Application Components & System Details

An accurate picture of the application components currently used by your organisation and the following system details:

- ☐ the programs;
- ☐ databases;
- ☐ user interfaces; and

- ☐ utilities that comprise the standard, non hardware components of an application environment.

7.1.3 Development Environment

A detailed description of the development environment currently used by your organisation and document the following:

- ☐ all the tools;
- ☐ techniques;
- ☐ methods; and
- ☐ project management procedures used to build or modify a software solution.

7.1.4 Management & Support Structures

A detailed description of the internal management and support structures of your organisation's business as they apply to the existing information processing environment.

7.1.5 Needs, Goals & Objectives

A detailed description of the information processing needs, goals and objectives of your organisation.

7.2 On Site Environmental Assessment

Expert Software Services will likely perform the **Environmental Assessment** on site. Your organisation will need to make some resources available during the environmental assessment for information technology support to expedite the analysis and to insure its completeness and accuracy.

Detailed information is required to develop a valid migration scenario. The detailed data will be compiled and analysed and presented to your organisation. This assessment will stand on its own as adding significant value by providing a comprehensive evaluation of your organisation's environment from our knowledgeable experts.

7.3 Environmental Assessment Results

The result of the **Environmental Assessment** will be a qualitative assessment of your organisation's current information processing environment. It will include a qualitative analysis of how the organisation's prioritised business functions are being addressed by the current environment. The analysis will also include how the organisation is applying technology to solve business problems. It will also identify any strengths and weaknesses in the current environment. For the identified problems or areas of weakness, an analysis will be completed to determine whether solutions are possible based upon the experience of "world class" organisations.

Central to Expert Software Services' business is our emphasis on transferring our experience and knowledge to our clients. The **Environmental Assessment** we will

perform together will utilise all of our combined experiences and knowledge so as to provide you with the best possible first step towards an effective migration solution. However, we strongly recommend against proceeding with any migration solution without first doing an **Environmental Assessment**.

7.4 The Next Step

The Environmental Assessment is the first phase of all successful migration solutions. The results obtained are then used to define migration scenarios. Expert Software Services is able to help your organisation with:

- ☐ the preparation of migration scenarios;
- ☐ selection of the preferred migration scenario;
- ☐ the creation of a functional migration plan;
- ☐ execution of the migration plan;
- ☐ validation of the migration plan; and
- ☐ transition to your true solution.

To discuss your requirements for migration solutions and an **Environmental Assessment**, please contact us soon.

Expert Software Services
2nd Floor • 326 William Street
Melbourne VIC 3000

Tel: 03 9320 6100

Fax: 03 9320 6111

Email: info@expert.com.au

URL: <http://www.expert.com.au>