

ACTION MANAGEMENT SYSTEM

OPERATIONAL REPORTS GUIDE

"An Improvement System
that fits every Business"

The AMS Internet System

The Management Practice
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Business Associates Network Pty Ltd
MANAGEMENT REPORTS & SELECTION OPTIONS
 AMS Release 1.44



REPORT TITLE	Report Description	Included in AMS as Standard Report	Optional Report Selection (\$300/report)
DNA STRATEGIC PLAN REPORT	This report summarises the Business 5x5 Strategy by grouping the Level-1 (5) Actions and Level-2 (25) Actions together with their respective descriptive strategies and producing a 30-Section summary document that consolidates and articulates the overall strategy and direction of the business.	Yes	N.A.
DNA BUSINESS PLAN REPORT	This report is an expansion of the DNA Strategic Plan Report to include all 125 Operational Actions (Level-3 Actions) that underpin the 25 Strategic Business Actions. This report therefore provides a cascading description of the entire Business DNA with individual descriptions of all operational actions and how each action is to be done. No risk analysis or accountability references are included in this report as it is simply a descriptive summary of the major operational processes of the business.	Yes	N.A.
DNA ACTION PERFORMANCE REPORT	This time-line report is available for any individual DNA Action (i.e. Level-3 Action). This graphical report charts the actual performance against targeted performance of a DNA Action over the time periods recorded.	Yes	N.A.
BUSINESS DNA COMPLIANCE REPORT	This reports lists all 125 x DNA Actions together with the accessed overall Risk, the Performance Measure, the Target, the last recorded Actual Performance, the Frequency of measurement, the Achieved Performance %, and the person or role that has Accountability for each Action. This therefore produces a "compliance report" showing the measure of compliance of the business in all areas of operations.	No	[]
HIGH RISK DNA ACTION REPORT	This report is the same format as the Business DNA Compliance Report however it only selects the HIGH RISK elements of the business operation.	No	[]
ALL RISK ITEM SUMMARY REPORT	This report drills down into each DNA Action and lists all of the specific risks and the resolutions that have been identified for each action and who is accountable for each. Every DNA Action can have any number of identified risks and these are normally identified for a DNA Action as a pre-cursor to conducting an Improvement Audit.	No	[]



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REPORT TITLE	Report Description	Included in AMS as Standard Report	Optional Reports Selection (\$300/report)
IMPROVEMENT AUDIT REPORT	This report is a consolidated summary of the output from an Improvement Audit that is typically done in a "workshop" environment. Fourteen (14) questions are posed and answered in detail in connection with a specific operational area (typically one of the Level-3 Actions) followed by a recommendation of the actions that have been agreed to address the issues uncovered in the Audit. In essence this report becomes the formal outcome of an Improvement Audit meeting/workshop conducted by the business.	Yes	N.A.
PROJECT SUMMARY REPORT	This report summarises a single Improvement Project listing all of Project Actions that are included within an Improvement Project being undertaken by the business. Projects with up to twenty (20) actions are summarised in a Gantt Chart as well as a Project Action list. Larger projects with 20+ actions are reported only by a Project Action List. The report lists Project Actions, Who is Accountable, Start Date of each Project Action, End Date, and Status of each Action.	Yes	N.A.
PROJECT OVERDUE ACTIONS REPORT	This is a report that can be generated on any single Improvement Project and produces a list of all Project Actions that are overdue as of the date that the report is run. This report is intended as a "progress check" that can be done on any project by any user at any time. The report lists Project Actions, Who is Accountable, Start Date of each Project Action, End Date, and Status of each Action.	Yes	N.A.
ALL PROJECTS OVERDUE ACTIONS REPORT	This is a report is generated to cover multiple Improvement Projects and produces a list of all Project Actions that are overdue as of the report date on all Projects currently active within AMS. This report is intended as a summary for management as a "progress check" that can be automatically generated by AMS and emailed to selected managers on a predetermined and scheduled basis. The report lists all Improvement Projects together with all overdue Project Actions, Who is Accountable, Start Date of each Project Action, End Date, and Status of each Action.	No	[]



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REPORT TITLE	Report Description	Included in AMS as Standard Report	Optional Reports Selection (\$300/report)
INCIDENT ITEM DETAILS & STATUS REPORT	This report is simply a "hard copy" of the status of any single incident at a point in time. This is a simple method of outputting the progress details of a recorded incident for review, filing, or to complement any paper-based Quality Systems and procedures that may already be in place within a business. Full details of all Incident information within AMS, including the Rectification steps taken, are all printed.	Yes	N.A.
OPEN INCIDENTS LOG	This report is a list of all Incidents recorded by the business and not yet "closed" or resolved. This report includes all incidents that are currently open as of the date that the report is run. Incidents are grouped by "Incident Category" and then ordered by "Due Date" within each category. Line items also include Date Raised, Incident Cause/Description, Action-ID area to which they belong, Person assigned to Resolve, Person who Initiated, and Status.	Yes	N.A.
INCIDENT OVERDUE REPORT	This report is a list of all Overdue Incidents recorded by the business that are past their "Due Date" as of the date of running this report. Incidents are grouped by "Incident Category" and then ordered by "Due Date" within each category. Line items also include Date Raised, Incident Cause/Description, Action-ID area to which they belong, Person assigned to Resolve, Person who Initiated, and Status.	No	[]
ACTIVE INCIDENT CATEGORY REPORT	This report filters all incidents according to the Category of incident selected, and lists only those incidents that have the status of either "Active" or "New". Incidents are sorted in "Due Date" order (oldest first) and displays Date Raised, Incident Description, DNA Item to which the Incident relates, the Person to Resolve, and the Person who Initiated the Incident.	No	[]
INCIDENTS OVERDUE CATEGORY REPORT	This report displays only "incidents overdue" within the Category of incident selected, and lists only those incidents where the "Due Date" is earlier than the date of running of the report. Items are ordered (oldest first) and displays Date Raised, Incident Description, DNA Item to which the Incident relates, the Person to Resolve, and the Person who Initiated the Incident.	No	[]



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REPORT TITLE	Report Description	Included in AMS as Standard Report	Optional Reports Selection (\$300/report)
CURRENT EMPLOYEE DIRECTORY	This report is simply a list of all employees in order of their AMS User-ID (approximately alphabetical by Christian Name) listing their Name, Job Description, who they Report to, their Division/Department, their location, Phone number and email address.	No	[]
ANNUAL APPRAISAL CALENDAR	This report can be produced by any manager or supervisor who has staff reporting to them. Each employee has an annual appraisal date included within their staff record in AMS as part of their employment information. An employee normally expects to be formally reviewed on each anniversary of their appraisal date. This is a hieratical report that lists up to three levels of employees reporting to the manager/supervisor who runs the report. This report is used as a planning document by managers.	Yes	N.A.
PERFORMANCE APPRAISAL	This report is a "worksheet" for a performance appraisal and is available for generation by any manager or supervisor for any employees who reports to them. The report shows the detail of their measures, targets, and performance history for all 25 Job Actions of their Job 5x5. A blank "Review" area is provided under each history data box where the notes from the current performance review can be written for later entry into the employees Job 5x5 record.	Yes	N.A.
30-DAY JOB ACTION REVIEW PLANNER	This report identifies all of the Job Action reviews that are scheduled to occur on a direct subordinate in the next 30-days. It can be printed by any manager or supervisor for any employees who reports <u>directly</u> to them. The report includes the Job Actions of only employees who report directly to the manager, and shows the Job 5x5 Actions that are due for review in the sequence of those Review Dates. This report improves review planning by all managers and supervisors.	No	[]

Business Purpose

Improve Franchise efficiency and profit by;
** Systematisation of business operations, and
** Transparency of Operations.

1 Grow New Business & Departments

Our strategy for growing our new business is primarily through business partners. These business partners will be selected based on their need to add more value to their client's businesses. The products and services provided by our Business Partners will therefore be complementary to ours.

A marketing agreement will exist between us and each business partner that will give each business partner the right to license our systems to their clients. License Revenue earned from our system via a business partner will be shared by us and our business partner.

It will be possible for a client to sign up for our services directly with us but this will only be possible via our Internet Website and support will only be provided online through email or electronic conferencing workshops.

1.1 Develop Marketing Strategies

All opportunities (marketing, product, or any other) must be thoroughly researched with a financial business case and proposed via the marketing department.

All opportunity proposals must also have a sponsoring line manager who supports and seconds the defined initiative.

1.2 Reach our Buyers

Our strategy in market reach must be low cost and based on the leverage of Internet partners. Our own websites must therefore be of a high quality that promotes our image of an online service provider and complements the image of our partners.

1.3 Feed the CRM

Managing our client interaction and information is vital to our ongoing viability as a company. The more information that we hold about our client's satisfaction with our systems then the more likely it is that we can sell them additional systems. It is therefore an essential requirement for all sales and services personnel to continually update the CRM system with memo notes of all activity.

1.4 Progress New Client Tactics

New clients are primarily obtained by using our existing clients as references. Penetration into new client areas should therefore be conducted around firms within the same industries as existing clients. References should therefore highlight the specific benefits gained by the industry.

1.5 Measure Results from Client Base

New business obtained from existing clients should be a minimum of 25% of annual revenue. Sales reports must be prepared on a monthly basis to track new orders from our client base.

2 Develop Cool Software

All of our software should always incorporate the latest concepts in systems design.

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1.11 Investigate new markets & products

This is a more detailed description of the Level-3 action and guidance as to how this action should be undertaken.

Typically the data in this box should be in bullet form

<> How action #1

<> How action #2, etc.

1.12 Create, revise & implement marketing plans

Printed and published on Company Intranet

1.13 Expand existing markets & products

Innovative packaging solutions

1.14 Manage marketing consultant projects

Develop a project schedule and performance assessment in the first week of the project.

Obtain the clients sign off. Review progress to schedule daily with project team and weekly with the client

1.15 Provide marketing statistics

1.2 Reach our Buyers

Our strategy in market reach must be low cost and based on the leverage of Internet partners.

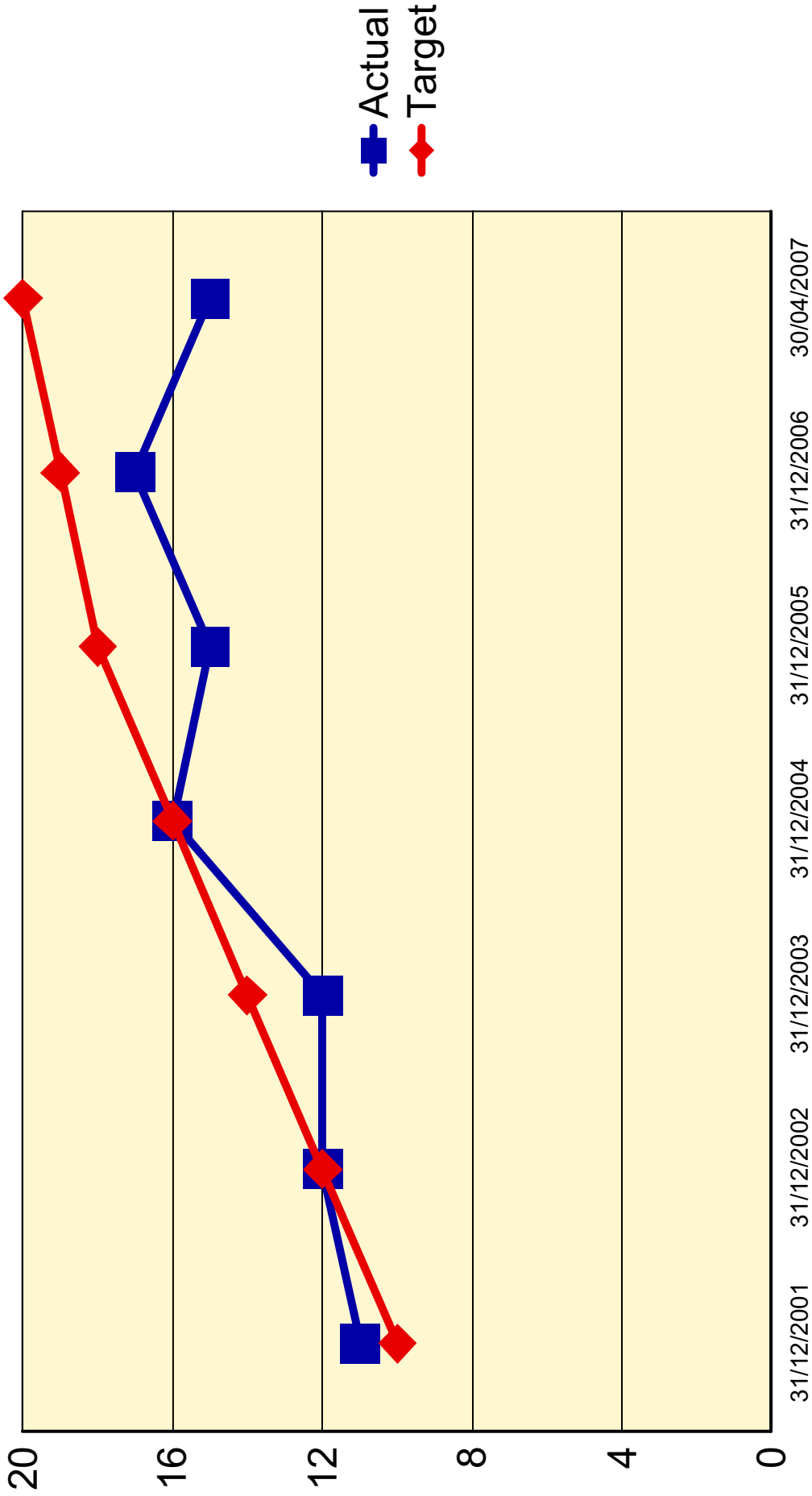
Our own websites must therefore be of a high quality that promotes our image of an online service provider and complements the image of our partners.

1.21 Maintain web site

Level-1: Develop Marketing Strategies

Level-2: Grow New Business & Departments

Reports to Partners





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Business DNA Compliance Report

User-ID: RB.1
 Date: 12/08/2007
 Time: 4:28:33PM

<u>Action-ID</u>	<u>Description</u>	<u>Risk</u>	<u>Measure</u>	<u>Target</u>	<u>Actual</u>	<u>Frequency</u>	<u>Performance</u>	<u>Accountability</u>
1.11	Grow New Business & Departments Develop Marketing Strategies Investigate new markets & products	High	Reports to Partners	20	15	Yearly	75.0%	Richard Burley
1.12	Grow New Business & Departments Develop Marketing Strategies Create, revise & implement marketing plans	High	Reviews of Plan	20	15	Yearly	75.0%	Clair Leap
1.13	Grow New Business & Departments Develop Marketing Strategies Expand existing markets & products	Low	New Products Introduced	3	2	Quarterly	66.7%	Clair Leap
1.14	Grow New Business & Departments Develop Marketing Strategies Manage marketing consultant projects	High	Projects completed	20	15	Yearly	75.0%	Blake Wilson
1.15	Grow New Business & Departments Develop Marketing Strategies Provide marketing statistics	Low	Referrals per project					Rick Hamilton+Bell
1.21	Grow New Business & Departments Reach our Buyers Maintain web site	High						Clair Leap
1.22	Grow New Business & Departments Reach our Buyers							



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High Risk DNA Action Report

User-ID: RB.1
Date: 12/08/2007
Time: 4:45:46PM

<u>Action-ID</u>	<u>Description</u>	<u>Measure</u>	<u>Target</u>	<u>Actual</u>	<u>Frequency</u>	<u>Performance</u>	<u>Accountability</u>	<u>WHO2</u>	<u>WHO3</u>
1.11	Grow New Business & Departments Develop Marketing Strategies Investigate new markets & products	Reports to Partners	20	15	Yearly	75.0%	Richard Burley	BW.1	TMP.1
1.12	Grow New Business & Departments Develop Marketing Strategies Create, revise & implement marketing plans	Reviews of Plan	20	15	Yearly	75.0%	Clair Leap	RHB.1	
1.14	Grow New Business & Departments Develop Marketing Strategies Manage marketing consultant projects	Projects completed	20	15	Yearly	75.0%	Blake Wilson	JT.1	RB.1
1.21	Grow New Business & Departments Reach our Buyers Maintain web site						Clair Leap	AL.1	RB.1
1.25	Grow New Business & Departments Reach our Buyers Prepare sales collateral & pricing						Richard Burley	CL.1	
1.31	Grow New Business & Departments Feed the CRM Manage prospects lists						Richard Burley	CL.1	
1.41	Grow New Business & Departments Progress New Client Tactics Conduct or respond sales calls						Richard Burley	JT.1	CL.1
1.43	Grow New Business & Departments Progress New Client Tactics Prepare & submit proposals						Richard Burley	JT.1	CL.1

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DNA Risk Items Report

User-ID: RB.1
 Date: 12/08/2007
 Time: 4:37:27PM

ID	Description	Risk Description	Person Acct	Comments on Resolution
1.11	Grow New Business & Departments Develop Marketing Strategies Investigate new markets & products	Risk 11 High	RB.1	Comments
1.11	Grow New Business & Departments Develop Marketing Strategies Investigate new markets & products	Traditional market is saturated High	RB.1	The Australian livestock industry is now largely computerised so for us to grow we need to expand into new markets <-> Fred said <-> Joe said
1.11	Grow New Business & Departments Develop Marketing Strategies Investigate new markets & products	Financial resources limit expansion Medium	RB.1	Any new marketing campaigns will have to be scaled back because there are insufficient funds
1.11	Grow New Business & Departments Develop Marketing Strategies Investigate new markets & products	Need to establish some best-fit product criteria Medium	RB.1	Current product is missing the mark with clients so this demands much better definition of our target market and the client characteristics of this market.
1.11	Grow New Business & Departments Develop Marketing Strategies Investigate new markets & products	Colin may never look at this risk Medium	RB.1	Colin has an aversion to being investigated
1.13	Grow New Business & Departments Develop Marketing Strategies Expand existing markets & products	Lack of competitive products Low	CL.1	This means that there is no previous market intelligence on this sort of product
1.31	Grow New Business & Departments Feed the CRM Manage prospects lists	No CRM established within Company Medium	RB.1	A CRM would be used to market to existing customers but the CRM doesnt exist

Action ID: 1.11 *Investigate new markets & products*

Question #	Question
1	<p><i>In what way does the item add value?</i></p> <p>Answer</p> <p>The credibility of the Marketing Plan and the inherent forecasts depend on this Action. It is impossible to justify any marketing or revenue forecasts without this intelligence. Stuart Douglas </p>
2	<p><i>What value does it add to?</i></p> <p>Answer</p> <p>(a) Competitive differentiation of products and services. (b) Improvement in our Net Profit by new product introduction. (c) </p>
3	<p><i>What could go wrong with this item?</i></p> <p>Answer</p> <p>Out of date knowledge of our competitor's strategies so that we should be investigating markets other markets that will retain our competitiveness. </p>
4	<p><i>How likely is that to occur?</i></p> <p>Answer</p> <p>Difficult to quantify in \$ terms before completing the investigation, so the real value will be determined by the forecasts that evolve from market analysis. Unless the incremental profit forecast is greater than \$100k per year then entry into this market would not be justified. </p>
5	<p><i>What could be done to mitigate that risk?</i></p> <p>Answer</p> <p>(a) Retain external specialist researches. (b) Expand our marketing staff. (c) Recruit a researcher from our competition.</p>
6	<p><i>Are there procedures to follow? What?</i></p> <p>Answer</p> <p>Staff must define the scope of the investigation and determine all desired outcomes so that the resources employed are utilised productively.</p>
7	<p><i>Are there forms to be filled in? What?</i></p> <p>Answer</p> <p>No standard method currently exists within the Company, however there are New Market Research guidelines provided by the Direct Marketing Association and these should be used to develop the scope of this Action. </p>
8	<p><i>Is there information the operator should know?</i></p> <p>Answer</p> <p>We need to know more about existing products in the target market segment. </p>
9	<p><i>How is the performance to be measured?</i></p> <p>Answer</p> <p>Performance should be measured in terms of approved new products and projected incremental net profit improvements.</p>



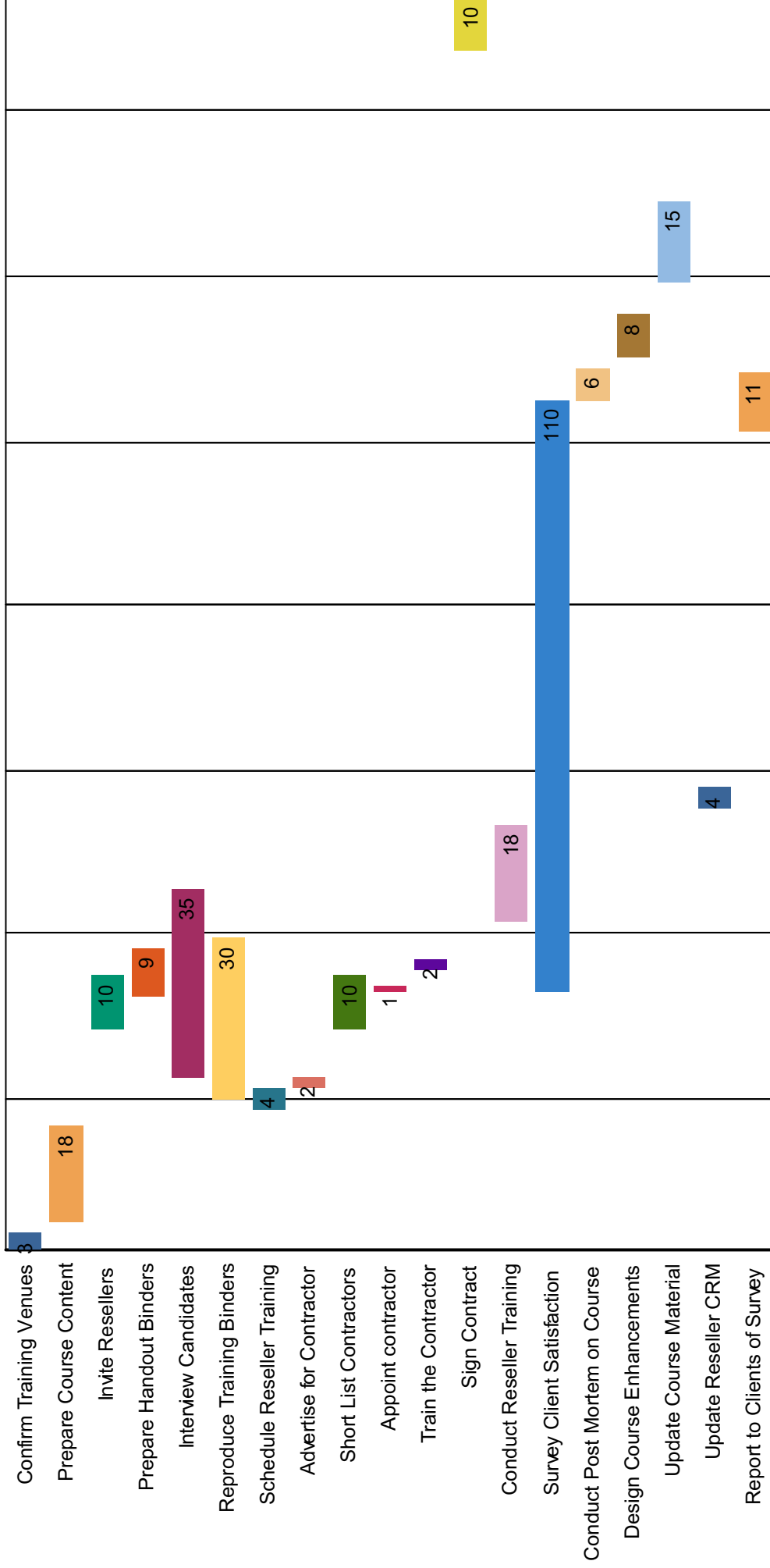
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Project Summary Report

User-ID: RB.1
Date: 12/08/2007
Time: 5:47:44PM

Project Name: Marketing Improvement Project

Project-ID: BIP01



01/02/2006 01/03/2006 01/04/2006 01/05/2006 01/06/2006 01/07/2006 01/08/2006 01/09/2006

Demo Company Pty Ltd

Project Summary Report

User-ID: RB.1
 Date: 12/08/2007
 Time: 5:47:44PM

Project Name: Marketing Improvement Project

Project-ID: BIP01

Item Order	Project Action	Who to do	Start Date	End Date	Status
001.00	Confirm Training Venues	Richard Burley	1/02/2006	4/02/2006	In Progress
002.00	Prepare Course Content	Richard Burley	6/02/2006	24/02/2006	Complete
003.00	Invite Resellers	Blake Wilson	14/03/2006	24/03/2006	Complete
004.00	Prepare Handout Binders	Richard Burley	20/03/2006	29/03/2006	Complete
005.00	Interview Candidates	Richard Burley	5/03/2006	9/04/2006	Scheduled
006.00	Reproduce Training Binders	Clair Leap	1/03/2006	31/03/2006	Complete
007.00	Schedule Reseller Training	John Troughton	27/02/2006	3/03/2006	Complete
008.00	Advertise for Contractor	John Walker	3/03/2006	5/03/2006	Complete
009.00	Short List Contractors	Stephen Carnell	14/03/2006	24/03/2006	Scheduled
010.00	Appoint contractor	Richard Burley	21/03/2006	22/03/2006	In Progress
011.00	Train the Contractor	Richard Burley	25/03/2006	27/03/2006	In Progress
012.00	Sign Contract	Vadim Hanko	12/09/2006	22/09/2006	In Progress
013.00	Conduct Reseller Training	John Troughton	3/04/2006	21/04/2006	Scheduled
014.00	Survey Client Satisfaction	John Troughton	21/03/2006	9/07/2006	In Progress
015.00	Conduct Post Mortem on Course	Richard Burley	9/07/2006	15/07/2006	Scheduled
016.00	Design Course Enhancements	Richard Burley	17/07/2006	25/07/2006	Complete
017.00	Update Course Material	Richard Burley	31/07/2006	15/08/2006	Scheduled
018.00	Update Reseller CRM	Andrew Leap	24/04/2006	28/04/2006	To Be Scheduled
019.00	Report to Clients of Survey	Andrew Leap	3/07/2006	14/07/2006	Scheduled



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Project Overdue Actions Report

User-ID: RB.1
Date: 12/08/2007
Time: 5:49:18PM

Project Name: Marketing Improvement Project

Project-ID: BIP01

Item Order	Project Action	Who to do	Start Date	End Date	Status
001.00	Confirm Training Venues	Richard Burley	1/02/2006	4/02/2006	In Progress
005.00	Interview Candidates	Richard Burley	5/03/2006	9/04/2006	Scheduled
009.00	Short List Contractors	Stephen Carnell	14/03/2006	24/03/2006	Scheduled
010.00	Appoint contractor	Richard Burley	21/03/2006	22/03/2006	In Progress
011.00	Train the Contractor	Richard Burley	25/03/2006	27/03/2006	In Progress
012.00	Sign Contract	Vadim Hanko	12/09/2006	22/09/2006	In Progress
013.00	Conduct Reseller Training	John Troughton	3/04/2006	21/04/2006	Scheduled
014.00	Survey Client Satisfaction	John Troughton	21/03/2006	9/07/2006	In Progress
015.00	Conduct Post Mortem on Course	Richard Burley	9/07/2006	15/07/2006	Scheduled
017.00	Update Course Material	Richard Burley	31/07/2006	15/08/2006	Scheduled
018.00	Update Reseller CRM	Andrew Leap	24/04/2006	28/04/2006	To Be Schedule
019.00	Report to Clients of Survey	Andrew Leap	3/07/2006	14/07/2006	Scheduled

Item #	Overdue Project Action	Who to do	Start Date	Date Due	Status
Project Name: Marketing Improvement Project			Project Manager is Richard Burley		
001.00	Confirm Training Venues	Richard Burley	1/02/2006	4/02/2006	In Progress
005.00	Interview Candidates	Richard Burley	5/03/2006	9/04/2006	Scheduled
009.00	Short List Contractors	Stephen Carnell	14/03/2006	24/03/2006	Scheduled
010.00	Appoint contractor	Richard Burley	21/03/2006	22/03/2006	In Progress
011.00	Train the Contractor	Richard Burley	25/03/2006	27/03/2006	In Progress
012.00	Sign Contract	Vadim Hanko	12/09/2006	22/09/2006	In Progress
013.00	Conduct Reseller Training	John Troughton	3/04/2006	21/04/2006	Scheduled
014.00	Survey Client Satisfaction	John Troughton	21/03/2006	9/07/2006	In Progress
015.00	Conduct Post Mortem on Course	Richard Burley	9/07/2006	15/07/2006	Scheduled
017.00	Update Course Material	Richard Burley	31/07/2006	15/08/2006	Scheduled
018.00	Update Reseller CRM	Andrew Leap	24/04/2006	28/04/2006	To Be Schedule
019.00	Report to Clients of Survey	Andrew Leap	3/07/2006	14/07/2006	Scheduled
Project Name: New Test Project 6			Project Manager is Richard Burley		
001.00	Project Action #1	John Troughton	21/03/2006	26/03/2006	Scheduled
002.00	Project Action #2	Richard Burley	26/03/2006	5/04/2006	Scheduled
003.00	Project Action #4	John Smith	5/04/2006	20/04/2006	To Be Schedule
004.00	Project Action #3	Richard Burley	31/03/2006	5/04/2006	To Be Schedule
005.00	Project Action #5	Richard Burley	10/04/2006	21/04/2006	Scheduled
Project Name: Sample Project - ET1			Project Manager is Eric Tjoeng		
001.00	Task1	Colin Burns	3/04/2007	13/04/2007	Scheduled
Project Name: Test Project 7			Project Manager is Darryl Winder		
001.00	PA-1	David Troughton	22/03/2006	4/04/2007	Scheduled
002.00	Project Action #2	Clair Leap	27/03/2006	11/04/2006	To Be Schedule
Project Name: Test-3			Project Manager is Richard Burley		
002.00	Confirm Resources	Richard Burley	16/03/2006	24/03/2006	Scheduled
003.00	Brief Project Resources	Richard Burley	24/03/2006	27/03/2006	Scheduled



Demo Company Pty Ltd

Incident Item Details & Status

User-ID: RB.1
Date: 12/08/2007
Time: 4:49:02PM

Incident Item # 3 linked to Action-ID: 1.11 Investigate new markets & products

Incident Cause: Goods returned with fault

Incident Description: Wigits purchased on 1/5/06 were returned because mechanical parts did not work. Full refund given to customer.

Date Raised: 5/05/2006 **Raised By:** Richard Burley

Date Due: 9/11/2006 **Allocated To:** Richard Burley

Priority: High **Status:** Active

Incident Category: Customer

Incident Rectification: Testing email advise
RB.1 5/5/2006 1.10PM:
Return goods to supplier and obtain a credit off next order.
Do not close incident until credit item is sighted on next order.
CL.1 6/5/2006 9.00AM:
Damaged goods received from customer today and returned to supplier with a covering letter requesting a credit at full cost price off our next order to filled.
CL.1 8/5/2006 9.00AM:
Invoice 987666 received from supplier for next shipment and P. Smith from Accounting Department verbally confirmed that a credit was included for faulty Wigits.
Awaiting QA check on this current shipment to confirm that no Wigits are faulty in this shipment. When QA check is clear then this incident report can be closed.

Open Incidents Log

Incident Category

Date Due	Date Raised	Incident Description	ID	Person to Resolve	Initiated by	Status
Customer						
3/03/2006	3/03/2006	Breakage of goods	1.11	Eric Tjoeng	Eric Tjoeng	Active
22/05/2006	12/05/2006	Delayed deliver	4.44	Richard Burley	Richard Burley	Active
6/06/2006	1/06/2006	Unhappy with product quality	1.12	Richard Burley	Richard Burley	Active
9/09/2006	8/09/2006	Late delivery	3.45	Richard Burley	Richard Burley	New
9/11/2006	5/05/2006	Goods returned with fault	1.11	Richard Burley	Richard Burley	Active
22/12/2006	20/12/2006	Late delivery	4.15	Alan Bignell	The Management PractiNew	
2/02/2007	13/01/2006	Late delivery	1.13	Colin Burns	John Troughton	Active
3/03/2007	21/02/2007	Late delivery	1.41	Paul Anderson	Richard Burley	Active
17/04/2007	12/04/2007		9.99	Richard Burley	Richard Burley	Active
Manufacturing						
23/09/2006	16/09/2006		1.21	Richard Burley	Scott Jones	New
6/11/2006	7/09/2006		2.32	Colin Burns	Richard Burley	New
OH&S						
22/01/2006	14/01/2006	RSI Complaint	1.31	Richard Burley	Blake Wilson	Active
7/04/2006	3/04/2006	Personal Injury	1.25	Eric Tjoeng	Eric Tjoeng	Active
14/06/2006	9/06/2006	No Danger sign	2.54	Clair Leap	Richard Burley	New
29/08/2006	24/08/2006	Cause	1.22	George Souris	Richard Burley	New
10/10/2006	31/07/2006	No money	1.34	Richard Burley	Richard Burley	Active
9/04/2007	4/04/2007		9.99	David Troughton	Catherine Chaumont	New
Retail						
1/07/2006	1/06/2006	Vandal damage	1.44	Richard Burley	Richard Burley	Active
22/03/2007	15/03/2007	sgag	1.42	Peter Pain	Richard Burley	New
11/08/2007	13/01/2006	Newspaper article	1.11	Stuart Douglas	Richard Burley	Active
Supplier						
22/03/2006	22/03/2006	Faulty paper delivered	1.45	John Smith	Richard Burley	New
Wholesale						
9/04/2007	4/04/2007	Not known	3.44	Catherine Chaumont	Richard Burley	New

Incident Category:

Date Raised	Incident Overdue	ID	Person to Resolve	DateDue	Initiated by	Status
Customer						
3/03/2006	Breakage of goods	1.11	Eric Tjoeng	3/03/2006	Eric Tjoeng	Active
5/05/2006	Goods returned with fau	1.11	Richard Burley	9/11/2006	Richard Burley	Active
1/06/2006	Unhappy with product qt	1.12	Richard Burley	6/06/2006	Richard Burley	Active
13/01/2006	Late delivery	1.13	Colin Burns	2/02/2007	John Troughton	Active
21/02/2007	Late delivery	1.41	Paul Anderson	3/03/2007	Richard Burley	Active
8/09/2006	Late delivery	3.45	Richard Burley	9/09/2006	Richard Burley	New
20/12/2006	Late delivery	4.15	Alan Bignell	22/12/2006	The Management Practi	New
12/05/2006	Delayed deliver	4.44	Richard Burley	22/05/2006	Richard Burley	Active
12/04/2007		9.99	Richard Burley	17/04/2007	Richard Burley	Active
Manufacturing						
16/09/2006		1.21	Richard Burley	23/09/2006	Scott Jones	New
7/09/2006		2.32	Colin Burns	6/11/2006	Richard Burley	New
OH&S						
24/08/2006	Cause	1.22	George Souris	29/08/2006	Richard Burley	New
3/04/2006	Personal Injury	1.25	Eric Tjoeng	7/04/2006	Eric Tjoeng	Active
14/01/2006	RSI Complaint	1.31	Richard Burley	22/01/2006	Blake Wilson	Active
31/07/2006	No money	1.34	Richard Burley	10/10/2006	Richard Burley	Active
9/06/2006	No Danger sign	2.54	Clair Leap	14/06/2006	Richard Burley	New
4/04/2007		9.99	David Troughton	9/04/2007	Catherine Chaumont	New
Retail						
13/01/2006	Newspaper article	1.11	Stuart Douglas	11/08/2007	Richard Burley	Active
15/03/2007	sgag	1.42	Peter Pain	22/03/2007	Richard Burley	New
1/06/2006	Vandal damage	1.44	Richard Burley	1/07/2006	Richard Burley	Active
Supplier						
22/03/2006	Faulty paper delivered	1.45	John Smith	22/03/2006	Richard Burley	New
Wholesale						
4/04/2007	Not known	3.44	Catherine Chaumont	9/04/2007	Richard Burley	New



Demo Company Pty Ltd

Active Incident Category Report

User-ID: RB.1
Date: 12/08/2007
Time: 4:26:27PM

Incident Category - Customer

Date Due	Date Raised	Incident Description	DNA-ID	Person to Resolve	Initiated by	Status
3/03/2006	3/03/2006	Breakage of goods	1.11	Eric Tjoeng	Eric Tjoeng	Active
22/05/2006	12/05/2006	Delayed deliver	4.44	Richard Burley	Richard Burley	Active
6/06/2006	1/06/2006	Unhappy with product quality	1.12	Richard Burley	Richard Burley	Active
9/09/2006	8/09/2006	Late delivery	3.45	Richard Burley	Richard Burley	New
9/11/2006	5/05/2006	Goods returned with fault	1.11	Richard Burley	Richard Burley	Active
22/12/2006	20/12/2006	Late delivery	4.15	Alan Bignell	The Management Practi	New
2/02/2007	13/01/2006	Late delivery	1.13	Colin Burns	John Troughton	Active
3/03/2007	21/02/2007	Late delivery	1.41	Paul Anderson	Richard Burley	Active
17/04/2007	12/04/2007		9.99	Richard Burley	Richard Burley	Active

Demo Company Pty Ltd
Incidents Overdue Category Report

User-ID: RB.1
Date: 12/08/2007
Time: 4:53:22PM

Incident Category - Customer

Date Raised	Incident Overdue	ID	Person to Resolve	DateDue	Initiated by	Status
3/03/2006	Breakage of goods	1.11	Eric Tjoeng	3/03/2006	Eric Tjoeng	Active
5/05/2006	Goods returned with fault	1.11	Richard Burley	9/11/2006	Richard Burley	Active
1/06/2006	Unhappy with product quality	1.12	Richard Burley	6/06/2006	Richard Burley	Active
13/01/2006	Late delivery	1.13	Colin Burns	2/02/2007	John Troughton	Active
21/02/2007	Late delivery	1.41	Paul Anderson	3/03/2007	Richard Burley	Active
8/09/2006	Late delivery	3.45	Richard Burley	9/09/2006	Richard Burley	New
20/12/2006	Late delivery	4.15	Alan Bignell	22/12/2006	The Management Practice	New
12/05/2006	Delayed deliver	4.44	Richard Burley	22/05/2006	Richard Burley	Active
12/04/2007		9.99	Richard Burley	17/04/2007	Richard Burley	Active



Demo Company Pty Ltd

Current Employee Directory

User-ID: rb.1
 Date: 12/08/2007
 Time: 4:29:33PM

User ID	Name	Description	Reports to	Division	Location	Phone	Email
AT.1	Andrew Tindell	AMS Associate	The Management Practice	TMP	SYD	0413-436 370	andrew@cartsea.com.au
CB.1	Colin Burns	AMS Associate	The Management Practice	CAD	MELB	03-9578 5458	colinb@cadpartners.biz
CC.1	Catherine Chaumont	AMS Associate	The Management Practice	CSA	SYD	0415-392 872	customsafe@optusnet.com.au
CL.1	Clair Leap	Marketing Consultant	The Management Practice	SALES	NTHSYD	02-6235 9039	ask@themanagementpractice.com
DT.1	David Troughton	AMS Associate	The Management Practice	WRS	SYD	0417-441 256	david@workrisksolutions.com.au
DTB.1	Danielle Bourke	Receptionist	Mary Guest	SALES	SYD	02-9958 4170	
ET.1	Eric Tjoeng	Improvement Manager	John Smith	CAD	SYD	02-9629 6228	eijoeng@bigpond.net.au
FS.1	Frederick Smith	Marketing Consultant	Richard Burley	HO	NTHSYD		ask@themanagementpractice.com
HE.1	Howard Elliott	AMS Associate	The Management Practice	TX	SYD	0411-508 810	howard@telemetrics.com.au
JS.1	John Smith	Administration Manager	Andrew Leap	HO	SYD	02-9431 5305	ask@themanagementpractice.com
JT.1	John Troughton	Chief Financial Officer	The Management Practice	HO	SYD	02-9431 5305	jtrought@bigpond.net.au
JW.1	John Walker	AMS Associate	Richard Burley	TMP	SYD	0416-146 256	johnwalker9@aapt.net.au
LC.1	Liam Clancy	AMS Associate	The Management Practice	TMP	ADEL	0412-059 600	lca1965@bigpond.net.au
MG.1	Mary Guest	Sales Representative	Richard Burley	SALES	NTHSYD	02-9431 5305	ask@themanagementpractice.com
PA.1	Paul Anderson	AMS Associate	The Management Practice	TMP	PER	0411-284 042	paul_e_anderson@hotmail.com
PP.1	Peter Pain	AMS Associate	The Management Practice	TMP	CROWS	0418-229 204	peterpain@outovate.com.au
RB.1	Richard Burley	National Sales Manager	The Management Practice	TMP	CANB	02-9431 5305	rburley@themanagementpractice.com
RHB.1	Rick Hamilton-Bell	Operations Manager	Andrew Leap	IT	CANB	02-6262 9991	ask@themanagementpractice.com
RZ1.1	Rosti Zacharias	Service Administrator	The Management Practice	TMP	CROWS		
RZ2.1	Rosti Zac	Administration Manager	The Management Practice	TMP	CROWS		
SC.1	Stephen Carnell	AMS Associate	The Management Practice	TMP	SYD	0418-255 440	scarnell@bigpond.net.au
SD.1	Stuart Douglas	AMS Associate	The Management Practice	TMP	ADEL	0449-060 562	stuart@kfg.com.au
SJ.1	Scott Jones	AMS Associate	Richard Burley	TMP	CROWS	0401-226 869	scottj@justbettersystems.com.au
TMP.1	The Management Practice	Improvement Manager	User Name	TMP	CROWS	02-9431 5305	ask@themanagementpractice.com
TMP.1	The Management Practice	Improvement Manager	Systems Administrator	TMP	CROWS	02-9431 5305	ask@themanagementpractice.com
TU.1	Test User	Sales Representative	Richard Burley	TMP	CROWS		
TV.1	Temporary Visitor	Visiting Employee	The Management Practice	HO	CROWS		
VH.1	Vadim Hanko	Software Development Mgr	Richard Burley	HO	CANB		vadim.hanko@mycosystems.com.au



Demo Company Pty Ltd

Annual Appraisal Calendar

User-ID: RB.1
Date: 12/08/2007
Time: 4:27:37PM

Supervisor
The Management Practice

Supervisor Role
Improvement Manager

Employee Hierachy	Review Date	Phone Number
John Troughton	31/01/2006	02-9431 5305
Richard Burley	31/01/2006	02-9431 5305
Mary Guest	31/01/2006	02-9431 5305
Danielle Bourke	15/03/2006	02-9958 4170
Tim Elliott	30/07/2006	02-9958 4170
Scott Jones	6/09/2006	0401-226 869
John Walker	11/10/2006	0416-146 256
Frederick Smith	25/10/2006	
Rosti Zak1	20/04/2007	
Test User	25/04/2007	
Vadim Hanko	11/05/2007	
Darryl Winder	1/03/2006	0409-300 224
Andrew Leap	31/01/2006	0417-597239
John Smith	2/01/2006	02-9431 5305
Rick Hamilton-Bell	31/01/2006	02-6262 9991
George Souris	24/08/2006	
Alan Bignell	20/12/2006	0416-016038
Clair Leap	31/01/2007	02-6235 9039
Colin Burns	31/01/2007	03-9578 5458
Paul Anderson	21/02/2007	0411-284 042
Peter Pain	21/02/2007	0418-229 204
Andrew Tindell	20/03/2007	0413-436 370
Catherine Chaumont	2/04/2007	0415-392 872
David Troughton	2/04/2007	0417-441 256
Temporary Visitor	18/04/2007	
Rosti the Admin	20/04/2007	
Rosti Zac	21/04/2007	
Rosti Zacharias	21/04/2007	
Liam Clancy	29/04/2007	0412-059 600
Stephen Carnell	4/06/2007	0418-255 440
Howard Elliott	6/07/2007	0411-508 810
Stuart Douglas	2/08/2007	0449-060 562



Demo Company Pty Ltd

Performance Appraisal

User-ID: RB.1
Date: 17/08/2007
Time: 9:31:32AM

Employee Name
Richard Burley

Employee Role
National Sales Manager

Reports To
The Management Practice

Job ID	Job Action Description	Measure	Target
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Develop & Implement Marketing Projects

1.1 Prepare Direct Mail Campaigns

Letters mailed or
emailed

200

Description: Direct Mail campaigns have the single objective to create enquiries for our products. Campaigns should generate new prospect demand and achieve a 2% response rate.

Performance History: 1/2/06 Mail Campaigns are in progress but not complete.
RJB Note: Blah Blah
17/5/07 Review is sub-standard

Review :

Develop & Implement Marketing Projects

1.2 Develop Reseller Alliances

Description:

Performance History:

Review :

Develop & Implement Marketing Projects

1.3 Target Industry Association alliances

Description:

Performance History:

Review :

Develop & Implement Marketing Projects

1.4 Develop strategic Distributor Relationships

Description:

Performance History:



Demo Company Pty Ltd
30-Day Job Action Review Planner

User-ID: RB.1
Date: 12/08/2007
Time: 4:25:24PM

Supervisor Name
The Management Practice

Supervisor Role
Improvement Manager

Review Date	Direct Reporting Staff Name	Job Action to be Reviewed
20/08/2007	Richard Burley	Prepare Direct Mail Campaigns