Customer Support Handbook

Talent2 Works
Alesco Response Centre

Issue 3.1

Date 14 December 2007
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Response Centres. Currently there are Alesco Response Centres in Australia, Malaysia, PNG and the U.K. All support procedures documented herein only apply to the Australian Alesco Response Centre.

### Alesco Response Centre Australia - Contacts:

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<tr>
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<tr>
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<td></td>
<td>Suites 3 &amp; 4, 6 Brodie Hall Drive, Bentley WA 6102 Australia</td>
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|                  | New Zealand customers 0800 777 633 |

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| Electronic mail   | response@talent2.com   |
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CHAPTER 1

Introduction

This handbook has been produced to provide users of Alesco HRIS with a guide to the support services provided by Talent2 Works Pty Ltd.

Talent2 Works has a policy of continuous improvement. Therefore, we welcome customer feedback. Should you require clarification of our services, or have any suggestions or comments, we would be pleased to hear from you.

Changes, additions, alterations and corrections issued between handbook updates will be communicated via an email Bulletin to all Alesco customers.

The Alesco Response Centre provides customer support Monday to Friday (business days excluding public holidays) 8.30am to 5.30pm local time at that the customer primary site.
An overview of Talent2 Works Support Services

Talent2 Works recognises that comprehensive and consistent support is vital to the success of any large-scale, business-critical software application. This chapter discusses the Alesco Response Centre and Client Services available to Alesco customers as part of either standard maintenance or as additional chargeable services.

Talent2 Works Alesco Response Centre

The Alesco Response Centre complements the services provided by Client Services.

Services covered by the Alesco Response Centre - standard maintenance agreement.

- Customer Service Request resolution including telephone and email advice, to accredited users from customers in live operations, following their hand over to the Alesco Response Centre from the implementation consulting team. See chapter 4 – Customer Service Requests.

  **Customers who are still in implementation phase and have not gone live on the system or have not completed the hand over to the Alesco Response Centre should direct all queries to their Alesco project manager/consultant.**

- Software upgrades in the form of pre production patches, minor releases, major releases and new versions. These upgrades are made available through the Talent2 Works FTP site. If applicable, upgrades are available on compact disk and are distributed by the Response Centre.

- Technical assistance when upgrading versions of the software is a chargeable consulting service and is not included under the standard maintenance agreement (see section 'Talent2 Works client services').

- Emergency software fixes to Severity 1 and Severity 2 Customer Service Requests where the problem is identified as a software fault. These fixes take the form of an alpha patch, which is formally released to the customer.

- Software fixes to Severity 3 and 4 Customer Service Request’s, where the problem is identified as a software fault, are distributed to customers in a formal release to the product.

- User documentation in the form of user guides and release notes.
• Distribution of the Alesco Release Schedule that notifies customers of the content of impending patches and releases.

**Services covered by the Alesco Response Centre – chargeable** (see also appendix G)

• Telephone advice to non-accredited users. All contact with the Response Centre by non-accredited users is charged at the rate equivalent to AUD $300.00 per hour on a time and materials basis. (See Appendix E 'Alesco accreditation' for details on how to become an accredited user).

• Contract extended hours of support. When requested, the services of the Response Centre may be extended on a permanent basis to timeframes requested by the customer. This is negotiated as part of the maintenance agreement contract and is incorporated into the support charges as an additional maintenance fee.

• Ad hoc nominated after hours support. Where required, a customer may request support coverage to be extended. This is usually requested in circumstances when it is anticipated that support assistance may be required during payroll processing (for example, running a pay on Saturday due to a large retro instance and requiring support to be on-call in case problems arise). In these instances, the Response Centre requires a minimum of 5 days notice to ensure the request is effectively resourced.

• Resolution of customer induced errors. In certain circumstances the Response Centre is required to log in to a customer site to resolve a customer induced error, for example, reverse out a payroll that has failed due to a database crash.

**It is the obligation of the customer to:**

• Ensure a minimum of two accredited users are available to liaise with the Response Centre. (See appendix E 'Alesco accreditation' for details on obtaining user accreditation).

• Ensure a consulting services agreement is signed and returned to Talent2 Works International prior to any chargeable work commencing. It is understood that this may not be possible in all cases (for example, time-critical issues). In this circumstance, the customer is to agree, either via returning the signed CSA by fax or by e-mail (with signed CSA to follow), to work being chargeable if the problem is identified as customer induced.

• Provide the Response Centre with all relevant screen dumps, trace files and information required in order to effectively investigate and resolve the customer support request.

• Conduct thorough investigation of the problem to ensure that every attempt has been made to resolve and rule out setup issues prior to contacting the Response Centre.
Where required, provide remote login access in order to resolve or investigate Severity 1 and 2 issues. In most instances remote access is required to either reverse out crashed payroll processing or analyse an issue (for example, interrogate the customer database) when all other investigative procedures have failed to determine the cause of the problem. To this end, time is of the essence. It is therefore vital that remote login is already set up and tested, and is available at all times, to allow for immediate access during emergency situations.

Talent2 Works Client Services

Talent2 Works Client Services offers a range of additional support services that are outside the scope of this guide, all designed to help you make the most of Alesco HRIS. These additional services are described briefly on the following pages and more detailed information is available from your local account manager.

In addition, Talent2 Works Client Services also perform the following functions:

- Manages the relationship between our two organisations to ensure that your expectations are met. The local account management team represents you within Talent2 Works and co-ordinates contact with the range of Talent2 Works teams (product services, client services, finance etc).
- Works with you to co-ordinate resources, to assist in implementing Alesco HRIS upgrades and additions and to ensure successful operations.
- Provides feedback to Talent2 Works about issues in your organisation and industry sector.
- Ensures that you continue to be satisfied with Talent2 Works, product services, client services and other important aspects of your investment in Alesco HRIS.

Implementation and upgrade consulting

Talent2 Works consulting provides extensive consultancy services to ensure a successful implementation of Alesco HRIS in your organisation. Our services during an implementation may range from project management, upgrade implementation, business process reviews, performance tuning, database administration and maintenance, customisation and report writing, bringing together a proven methodology and vast experience.

For further information about Alesco consulting services, please contact the Response Centre or your local Talent2 Works office.
Training

Talent2 Works recognises the importance of well trained and confident staff to the successful use of the Alesco HRIS. Talent2 Works offers a comprehensive range of training courses designed to increase user confidence and skills. These courses can be tailored to the particular experience levels and job functions of those attending, and can be delivered on-site, at a Talent2 Works office facility.

The training provided by the courses ranges from basic usage of Alesco HRIS products and functions to advanced use of processing and reporting sub-systems including payroll and leave. It covers specialist training for payroll managers, leave clerks, recruitment staff and other HR personnel using Alesco HRIS, as well as Oracle training for database and systems administrators.

In addition to the structured training courses offered, Talent2 Works can also construct an education program to suit the needs of a customer organisation, either at your premises or ours. These purpose-designed programs can have the same structure as scheduled courses, or be completely tailored to your specific requirements.

For further information about Alesco education services, please contact your local Talent2 Works office.

Business management consulting

Talent2 Works also provides general business and human resources consultancy services, including process review and modelling, designed to ensure optimisation of your human resources/payroll function and use of the Alesco HRIS product.

For further information about Alesco consultancy services, please contact the Response Centre or your local Talent2 Works office.

Technical consulting

Talent2 Works can also deliver technical support to ensure the smooth ongoing operation of your Alesco-Oracle RDBMS implementation. Services include database tuning, database administration, systems administration and payroll processing services.
Alesco Response Centre - Customer Support Services

This section of the customer support handbook is designed to help you get the maximum benefit from the services provided to Alesco HRIS customers by the Alesco Response Centre. Customer Service Requests – CSR's, are covered in Chapter 4.

Alesco Response Centre handover procedure

Following the initial implementation of Alesco HRIS for a new customer, or a significant upgrade for an existing customer, the local consulting team provides initial support, typically for 1 to 3 months. This period of local support is determined by the Alesco project manager in agreement with the customer. The Response Centre is notified of the handover date. As a general guideline a new customer is supported at local/project level for 2 to 3 pay cycles after 'go live'.

During this time, Response Centre handover documentation is prepared and a formal handover from the local consulting team to the Alesco Response Centre is agreed with the customer.

This documentation provides pertinent information to the Response Centre, such as modules in use, accredited users and contact information. The aim of gathering this information is to provide the Response Centre with data that is relevant to support issues so that a high quality level of customer service can be delivered.

The Response Centre handover documentation pro-forma is outlined in appendix F.

During the handover process, a senior/principal consultant from Talent2 Works will review the skills of your accredited users.

An accredited user acts as the customer's gateway to the Response Centre, and is the on-site coordinator and reviewer of all problems and CSR's raised. The Response Centre liaises with the accredited user to obtain clarification of problems and request further information. All correspondence from the Response Centre (for example, severity changes/reviews, acknowledgment of receipt of CSR's, and so on) is sent to the accredited user. It is recommended that a backup contact person be nominated to cover sick days, holidays, or situations when the accredited user cannot be reached.

The process of obtaining Alesco user accreditation is set out in appendix E 'Alesco accreditation'.

Talent2 Works FTP site.

Talent2 Works provides an FTP site for customers. The FTP site is used as a delivery tool for releases/patches and many other items of information. Initially to gain access new Customers should contact the Response Centre. The FTP site is referred to throughout this document.
Oracle errors

When Alesco HRIS reports an ‘Oracle error’, this means that something has occurred at the database level, or within the code of a program, which has been detected by the Oracle error checking processes.

Oracle errors should always be reported first to your DBA or systems administrator, who can refer to the Oracle database administrator’s guide to obtain further information about the nature of the error message.

Oracle errors can manifest itself in a number of ways. From the perspective of a customer using the power user interface, two such ways to identify the origin of an Oracle error include:

1. Selecting the DISPLAY ERROR function from the power user interface (refer to SHOW KEYS for the key combination required).
2. For reports producing errors, viewing the trace file in FG365

The Alesco Response Centre can provide assistance with resolution of Oracle errors; however, where the Oracle licences were not purchased from Talent2 Works, users should be aware that they may be referred to Oracle’s worldwide support for attention unless their software licence agreement specifically provides for an alternative Oracle support strategy.

Installing Alesco HRIS versions, releases and patches

It is the customer’s responsibility to maintain the currency of the version of Alesco HRIS operated (see supported version of Alesco HRIS) and to provide adequate expertise to install and verify the correct operation of a patch, release or version.

Software Releases

Software Releases and Versioning

Alesco software is released though pre production patches, minor releases and major releases. The complete version number of any release or pre production patch identifies the release level of the software.

Minor releases generally occur every six months and major releases generally occur every 2 years.

Alesco pre production patches, minor releases and major releases utilise a four-block version numbering system – e.g. version 10.01.001.01.

For consistency with contract and general software terminology, a version is a major release and may or may not see a change in the first set of digits.

The first and second set of digits (i.e. ‘10.01’) identifies the major release number of the software – this will increment when significant
changes in functionality and technology are introduced. A major release generally occurs every two years.

The third set of digits (i.e. ‘001’) identifies the minor release number of the software – this will increment when significant changes in functionality are introduced, but generally not technology changes. A minor release generally occurs every six months.

The forth set of digits (i.e. ‘01’) identifies the pre production patch of the software – this will increment when sufficient work orders have been completed to make them available to customers.

Pre production patches

The pre production patch release mechanism was introduced to enable customers to access new program changes in a timely manner without having to wait for the next Minor/Major release which occurs every six months with the intention that the customer progresses to the following release when it becomes available. Pre production patches will have undergone unit testing, however they will not have undergone full system testing or Beta testing.

It is important for the customer to be aware that this Pre production software will not be supported as ‘official’ software, though where assistance is required and queries are directed to the Talent2 HRIS Response Centre, these will be investigated.

See Appendix H for a detailed explanation of the pre production patch release mechanism.

As with all software, the onus for testing preproduction software for stability and compatibility remains with the customer. It should also be noted that full system testing for Preproduction software has NOT been conducted by Talent2. Only specific unit testing relating to the particular work order has been performed. It is therefore vital that all customers undertake the necessary testing of software in a non-production environment before migrating this software to their production environment.

Software Releases – Customers Testing Responsibilities

As with all software, the onus for testing pre production patches, minor releases and major releases for stability and compatibility remains with the customer.

Software Release Media

Alesco pre production patches and minor releases are made available via the Talent2 Works FTP site. Major releases are issued on CD.

Pre production patches and minor releases may also be issued on CD where access to the Talent2 Works FTP site is not possible.

Customers requiring software releases in formats other than CD may be required to reimburse Talent2 Works for the cost of conversion of
magnetic data to the required format. In these cases, no rebate is made for returned media.

Talent2 Works warrants that the standard media on which software is shipped is free of defects in material or workmanship during normal use for ninety (90) days from the date of shipment. If you receive media that is faulty, contact the Response Centre to arrange for a replacement tape to be sent.

Release Schedules

Release Schedules are generally published to the customer base via email four times a year, in June, August, December and February. The release schedule details the confirmed and anticipated deliverables in the next Minor/Major release. This includes enhancements and bug fixes. The release schedule also details any de-support events that will be occurring in the future, that may affect customers upgrade timeframes. For example, the de-support of a particular version of Oracle.

Beta Testing

Prior to every Minor or Major Release, a Beta Testing process occurs if a customer site volunteers to participate in this process. The Beta software is made available to the customer site via the FTP site. The Beta Testing process is undertaken over a four week period prior to the official release of the Software. During the Beta Testing period the customer is fully supported by the Alesco Response Centre, and all issues resulting from the Beta Test are acted upon in a very timely manner.

The intention of the Beta testing process is to test and confirm all work that will ultimately be released into the CORE product. The Beta testing process does not take into account customisations that may or may not be affected as a result of implementing the Beta release for Beta testing.

As with any upgrade it should be included as part of the customer's planning process to take into account any customisations that are affected or possibly impacted as a result of the Beta release software. It is recommended that the customer to discuss this with their Account Manager as part of the planning process for Beta testing.

Any customers who wish to take part in the Beta Testing process should notify their Account Managers.

Supported versions of Alesco HRIS

The support services detailed in this Handbook are provided to customers operating the most current major release, and immediately prior major release of the Alesco HRIS.

Severity 1, Severity 2 and legislative changes are released in the next minor release (subject to cut off times) for each supported major release.
To further assist customers, Talent2 will provide access to the latest mandatory legislative changes (via an alpha patch) based on the two most current minor releases within each supported major release prior to the effective date of the legislative change. This will mean customers who keep their Alesco environment to within 12 months of the latest minor release will also benefit from having legislative updates available on that release level.

For example if a mandatory legislative change is effective as of the 1-July-2008 then the preceding minor releases that were delivered in April 2008 and October 2007 will be patched. This will be in addition to releasing these changes to the next minor release in October 2008.

In this example, this would result in alpha patches being made available for:
- V10.01.004.00 Minor Release
- V10.01.005.00 Minor Release
- V10.02.002.00 Minor Release
- V10.02.003.00 Minor Release
- V11.01.000.00 Release
- V11.01.001.00 Minor Release

The legislative changes being released into:
- V10.01.006.00 Minor Release
- V10.02.004.00 Minor Release
- V11.01.002.00 Minor Release

The table below illustrates the above example.

| Supported Releases Based on Legislative change Effective 1/July/2008 |
|-----------------------------------------------|---------------|---------------|
| e8.07                                         | e8.07.007.00  |               |
| V10.01                                        | V10.01.003.00 | V10.01.004.00 | V10.01.005.00 | V10.01.006.00 |
| V10.02                                        | V10.02.001.00 | V10.02.002.00 | V10.02.003.00 | V10.02.004.00 |
| V11.01                                        | V11.01.000.00 | V11.01.001.00 |               |               |

Legislative Changes will not be Patched to these releases

Legislative Changes Patched to these releases

Legislative Change effective Date

Legislative Changes Rolled into CORE

Should customers require support of an unsupported release, Talent2 may, at its sole discretion, provide such support on a case by case basis. Where support is provided, Talent2 Works reserves the right to increase maintenance rates on a ‘Time and Materials’ basis to offset the additional costs incurred.
Alpha Patches

Where a Severity 1 or 2 CSR is identified as a software fault and is resolved by a program modification, where possible, Talent2 Works will provide an alpha patch to the customer based on their relevant minor/major release. The program modification will also attempt to be released into the core product at the next available minor or major release, whichever occurs first. Where a Severity 3 or 4 CSR is identified as a software fault and is resolved by a program modification, an alpha patch will not be provided to the customer, however the modification will be released into the core product in a future release. See Chapter 4 for Severity ratings.

Alesco Alerts

Alesco Alerts is an initiative to proactively notify customers of emerging issues. The Alerts enable customers to proactively manage the issue within their environment and allow the Response Centre to focus on new issues. The intent is not to publish all issues, but to target very generic problems.

An Alert will be published where an issue has been found associated with the Alesco System that generally falls into the following categories.

- The issue has been reported by a number of customers.
- The issue may potentially impact a number of customers over time.
- The issue may prevent significant system processes to function correctly.
- A work around or solution is available.

Alerts are published via email in the first instance, as and when the need arises. They will also be documented in the Alesco Alerts.doc on the Talent2 Works FTP site.

Remote support

Talent2 Works requires that you provide Remote Access to allow Response Centre staff direct access to your system, when appropriate and agreed, to expedite resolution of a problem.

Talent2 Works will not use this access without your express consent. We appreciate the need to maintain absolute integrity and security of your critical information, and we will take reasonable care at all times to avoid infringement or compromise of your data security. Customers are, however, expected to have adequate security procedures in place to prevent unwanted intrusion or data loss.

In addition, Talent2 Works requires that all customers maintain a ‘test’ environment that is a replica of the ‘production’ environment for Alesco HRIS at your site.
It is recommended that customers set up their ‘test’ environment in such a way that Talent2 Works can access it when required, to expedite CSR resolution.

**Support Matrix**

The Alesco Support Matrix documents the current Alesco software certifications. It is updated at regular intervals and is made available to customers via the FTP site. The Alesco product relies on a substructure of Oracle products and tools. Generally, if a deployment combination, ie operating system, database etc, is supported by Oracle, then any Alesco deployment on that same combination will also be supported.

The Alesco Support Matrix specifies:

- A list of the hardware/software platforms that are certified against Alesco and supported by Talent2.
- The platforms that Alesco is tested on.
- Relevant patchsets that are certified by Talent2.
- Outlines the responsibilities of the client and any caveats with regards to the use of patchsets listed in the matrix.

**Site specific customisation**

It is the policy of Talent2 to provide support for the standard release version of Alesco HRIS. We do not support site-specific customisation of the application except where expressly stated in the software licence agreement or subsequent software maintenance agreement.

Where Alesco HRIS code has been modified to include site-specific customisation (either modifications carried out by the customer, or through engaging Talent2 Works consultants), and these modifications have not been incorporated into the standard release of Alesco HRIS, support by Talent2 Works is limited to correcting problems that occur in the unmodified code or that can be shown to also exist in the unmodified code.

This means that the Response Centre may, if it is believed that the problem is restricted to a locally modified program, require you to replace that program with the standard program from the currently supported version, charge you for problem resolution at the current time and material rates or refer the issue to your account manager for resolution.

Where detailed investigation results in an issue having been caused by a customisation then the Response Centre reserves the right to arrange for the investigation to be charged on a time and materials basis.
Customer surveys

From time to time, Talent2 Works conducts customer surveys to measure your satisfaction with our problem resolution processes, general software functionality, relationships with Talent2 Works staff and management, and other areas of concern to Talent2 Works. These surveys may occasionally take the form of detailed questionnaires, but more often are in the form of email with one or two questions. We would appreciate your participation in these surveys, as they help us to continually improve the service we provide.
Customer Service Request (CSR) –
Customer procedures

Customer Service Request (CSR)

Also refer to the Alert Web User Guide.doc

All customer requests for services are initiated through a Customer Service Request or CSR. A CSR is a request to the Alesco Response Centre for assistance — it may be a query, a problem, a clarification request, a change request, or some other form of required advice or assistance. The preferred method to raise a CSR is via Alert Web Services. In all cases it is the customer’s responsibility to raise the CSR and attach the appropriate documentation and information to allow for the effective investigation of the request. This chapter details how to effectively raise a CSR.

Alert Web Services enables the customer to create the CSR themselves in our Alert software, which the Response Centre uses to manage CSR’s.

Each CSR received is allocated a unique CSR number. This allows the Response Centre to track and manage your request efficiently and should be quoted in all communication.

The raising of a CSR allows the Response Centre to manage customer issues consistently and to provide equity from a time, delivery and responsiveness perspective across all clients.

As soon as a CSR is submitted via Alert Web Services, an email is automatically generated which notifies the Response Centre consultants of the request.

As a general rule, CSR’s are attended to by severity and earliest time received.

To ensure the most effective resolution of a CSR, Talent2 requires that each customer has a central point of contact for queries. This will be unless otherwise arranged, the Alesco HRIS accredited user on your site. Each site should have a minimum of two accredited users who are the central contact point for all support activity. In this way, we can ensure that all liaison between the customer and Talent2 Works is dealt with expeditiously and effectively.

Before raising a CSR, the Alesco HRIS accredited user should:-

- Consult the appropriate Alesco documentation to find out if the problem is due to miss-operation or misunderstanding of the system.
- Conduct an initial investigation to determine the exact nature and extent of the problem, and ensure that all possible setup issues have been ruled out.
If after the investigation the problem has not been resolved a CSR should be raised.

All further communications regarding CSRS are recorded behind the CSR in Alert. This record ensures that all communications and queries regarding the CSR are actioned and also reduces the risk of lost information. The CSR is being tracked and managed via Alert.

CSR’s are categorised by type. There are three main CSR types managed by the Alesco Response Centre:-

Problem/Error
General Enquiry
Enhancement

The following sections detail the requirements for each CSR type.

Customer Service Request for Problem/Errors type CSR’s

Problem/Error CSR’s usually relate to a problem with a customer’s processing, i.e. a program error, data error or user error.

Use the following CSR checklist to identify the information you need to raise the CSR via Web Alert Services:

<table>
<thead>
<tr>
<th>Have the following information ready to include with your CSR.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Alesco HRIS version number (for example, V10.02.001.00)</td>
</tr>
<tr>
<td>• Operating system name and release (for example, Linux Red Hat Advanced Server 2.1),</td>
</tr>
<tr>
<td>• Oracle RDBMS version number (for example, 10.1.0.2.0),</td>
</tr>
<tr>
<td>• Oracle Application Server version number (for example, 10.1.2.0.2),</td>
</tr>
<tr>
<td>• Is the problem occurring in your Test or Production environment.</td>
</tr>
</tbody>
</table>

What screen or function are you using when you experience the problem? You need to identify the module name (for example, FC029) from the top left corner of the screen. Each program or report is identified with a program revision located at the top left hand corner of the screen or report. Figure 1 shows the location of these fields. Information from these fields is to be included on the customer support request form as it provides necessary identifying information about the program you are using.

Figure 1 Location of the program number, program name and revision number fields in Alesco HRIS
<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What outcome were you expecting from this screen or function?</td>
<td>What outcome are you actually getting (or not getting), including any error messages that may be displayed? Can you recreate the problem at will, and if so how?</td>
</tr>
<tr>
<td>Is anyone else in your organisation known to be experiencing this problem?</td>
<td>Is this the first time you have tried this operation or function? If not, when was the last time you tried it?</td>
</tr>
<tr>
<td>Has anything changed since the last time you successfully carried out this task or function (version upgrade, patch applied, Oracle version updated, operating system changed, CONDEFs or other configuration changes etc.)?</td>
<td>Does the problem occur every time you use this feature or function? If not, what are the circumstances of usage when the problem does occur?</td>
</tr>
<tr>
<td>Are there any other application packages running which may be conflicting with Alesco HRIS or the Oracle RDBMS?</td>
<td></td>
</tr>
<tr>
<td>Have you dumped the screen and any related reports to a printer to include with the CSR?</td>
<td>Have you established that the problem exists in the latest version of Alesco HRIS by recreating the scenario in your development environment?</td>
</tr>
<tr>
<td>Payroll or leave issue? Carry out the additional checklist detailed in appendix C.</td>
<td></td>
</tr>
</tbody>
</table>

**Customer Service Request for General Enquiry type CSR’s**

Requests should be logged under this type where a customer has asked a question, needs information, or those requests which cannot be categorised as a Problem/Error or request for Enhancement.

As with Problem/Errors type the customer should put as much information behind the request as possible.

Depending on the enquiry it may be relevant to include any or all information pertinent to a Problem/Errors type.

For example if a customer requires either:

- User guide/whitepapers/support matrix or other documentation
- information regarding new versions of Alesco or technology
- Information regarding a process or form/report

Then the platform/version/form/report version that the client is on now and the intended details that they are going to will be relevant in terms of how the General Enquiry is responded to.
Customer Service Request for Enhancement type CSR's

All Enhancement Requests must be raised with a Business Requirements Specification form (see Appendix D for example copy). This document specifies the requirements of the Request and ensures accurate communication between all parties involved in submitting, assessing and approving an enhancement request.

The purpose of this document is to ensure that the customer is able to nominate the extent of involvement in the enhancement process, depending on the amount of information provided. For example for a minor change to a program to alter the sort order of a display form you may only need to fill out your Business Objective requirement, without needing to stipulate data inputs and outputs and suggested solutions and testing strategies. If on the other hand you were lodging a request for a new payslip design then you probably have very specific requirements and opinions on how the payslip should work, and its layout. In this instance the form should be completed in its entirety. In this way we aim to lessen the heuristic element of the approval process (and take out any guesswork on the scope of the change etc), by ensuring the application is comprehensive and provides all the required information in order to make an informed decision.

The BRS form consists of three pages. Pages 1 and 2 are for completion by you. Page 3 is completed by the Response Centre team member attending to your enhancement request.

Business Objective

In the Business Objective section please state the reason for your enhancement request.

Functional Description

Please state exactly what the desired change is. The description should include the business processes associated with the Enhancement. These can be documented as Process Flow diagrams where the business function is complex. The Process Flow diagram (in complex situations) will also assist in understanding the function of the change.

Data Inputs

Please detail all new information (or changes required to existing input data), that needs to be entered into Alesco in order to reflect this change/addition to functionality. Each piece of information should be defined including:

- Definition (i.e. what is the information required)
- Relationship to other data elements (i.e. a calculated value derived from other elements e.g. this value is calculated by multiplying the units by the avg hours).
- Attributes (i.e. data type (date/number/character) and the size of the field - e.g. require a description field that allows upper and lower case and is 50 characters long).
• Validation rules (i.e. this field must be mandatory and cannot be a negative number and must be between 0 and 100).

Data Outputs

Please describe the required outputs for the enhancement functionality. This should include any new or modified outputs which are as a result of this enhancement. For example if a new report was requested the outputs would be all the fields/columns on the report. Each output elements should be defined including:

• Definition (i.e. what is the information required)

• Relationship to other data elements (i.e. a calculated value derived from other elements - e.g. this value is calculated by multiplying the units by the avg hours).

• Attributes (i.e data type (date/number/character) and the size of the field - e.g. require a description field that allows upper and lower case and is 50 characters long).

Application Details

This section records the details of the Alesco HRIS module to which the BRS is related. In the ‘version’ field, enter the version of Alesco you are running (i.e. 10.02.001.00). In the ‘module’ field, enter the module in which this change relates i.e Payroll, Leave, Personnel, etc.

In the ‘existing program(s)’ field, enter the identifying number(s) of the actual form or report to which this Enhancement is related. This is usually a three digit number with a one or two character prefix (for example, FC452). Country-specific programs have two or three letters appearing after the program number (for example, RE290HK) to identify the relevant country (in the example, ‘HK’ indicates the program is Hong Kong-specific). The program number may also be read from the menu, in most cases, by recording the numbers in the second column after the menu option number, eg:

The revision number is located in the top left hand corner of the screen or program and should be quoted at all times. The screen location of the program revision number is illustrated in figure 1.

In the ‘program name’ field, enter the name of the program you are raising the BRS against. In the ‘supporting doc attached’ field, highlight the YES option to indicate if additional supporting documentation is attached to the BRS.

In the ‘total number of pages’ field, enter the total number of pages emailed/faxed/posted to the Response Centre, including the two pages of the BRS form.

Leave the ‘log number’ field blank. The log number is allocated by the Response Centre team member upon receipt of the BRS. You are advised of the log number either over the phone or by e-mail/fax to the customer contact person.

Use this reference number in all discussions and correspondence with the Response Centre relating to this BRS.
Suggested Solution Design

Please detail your suggested or recommended design of the solution to meet the business objective of the request. The design should include (where applicable) any images of new or modified Forms or Report layouts.

Special Testing Required

Please detail any special testing requirements which will help ensure that the software meets the business objectives and passes validation requirements. For complex solutions these can be documented as test case scenarios. Test Cases should include guidelines on how to test the function against requirements as well as a set of test data.

Advantages to the Product

Please list the advantages to the core Alesco product by inclusion of this Enhancement. Where applicable please include the benefits relative to existing and new directions of the business practice of People Management. References to existing features of other marketplace products can also be detailed in this section.

Advantage to the Customer

Please detail advantages to both existing and potential new customers in terms of business benefits, productivity improvements and cost savings.

Performance Guidelines

Some business functions require a certain level of performance from the system in order to be most effective. For example, a payroll officer answering an employees leave query by phone, would require a response within a much shorter time frame than a general lookup of leave information by admin staff. The manner in which the performance is measured should be specified, as well as any varying factors. These will be used in the design and build phases of an application.
Customer Service Request (CSR) – Response Centre Procedures

This chapter outlines the procedures used by the Response Centre after a CSR has been raised in Alert.

The Response Centre is responsible for three CSR request types. These types include:

- Problem/Error
- General Enquiry
- Enhancement

When a CSR is submitted, an email is sent to the Response Centre. A Response Centre consultant will review the CSR, and check that the CSR has the correct type, stage, severity, and that appropriate configuration information and supporting documentation have been entered or attached.

The CSR then progresses through different stages to closure, depending on the type of the CSR.

CSR Stages are as follows:-

**Logged** – Alert automatically inserts a stage of Logged when a CSR is submitted. Logged implies that no analysis has yet been conducted.

**Initial Analysis** – Initial investigation of the issue raised. During initial analysis the CSR is reviewed, including the severity rating and that environment details and supporting screen shots have been provided by the customer. Simple problem/error CSR’s and straight forward general enquiries are addressed during this stage, the customer notified and the CSR closed.

**Analysis** – If the Initial Analysis was unable to resolve the CSR, the CSR progresses to the analysis stage. This is where a detailed investigation is required to replicate the problem/error or to respond to the general enquiry.
**Sent to Development** – This stage is used where a problem/error CSR has been replicated and it has been determined that a program modification is required to rectify the problem. Sent to Development CSR’s are awaiting scheduling to be moved into program development.

**In Program Development** – This stage is given to a CSR that has been attached to a work order and allocated to a developer to undertake program modifications.

**Sent to QA/Testing** – This stage is given to a CSR order where the program modifications have been completed and tested by the developer, and are awaiting unit testing.

**Being Tested** – This stage is given to a CSR that is currently being unit tested.

**Software Ready for Release** – This stage is given to a CSR that has passed unit testing, and is awaiting release either in a pre production patch or a Minor or Major release.

**Software Released** – This stage is given to a CSR that has been officially released in either a pre production patch or a Minor or Major release.

**Sent to Branch / Acc Manager** – This stage is for CSR’s that will be dealt with by the local branch or account manager. Typically these requests are for services not covered under the maintenance service agreement such as customisations, consulting requests or training requests.

**Develop Documentation** – CSR’s are set to this stage where either a problem/error or general enquiry type CSR has identified a requirement to modify or develop documentation published by Talent2 Works, e.g. the Alesco User Guides. Once the changes to the documentation have been completed, the CSR will be closed and the new documentation will be released in the next Minor/Major release.

**Client Action Required** – This stage is for CSR’s where the customer has been asked to provide further information such as screen dumps or trace files, to assist with the investigation. To manage the Response Centre asks that any requested information is returned within 28 days, after which the request may be closed.

**Sent to Tech Support** – This stage is used for CSR’s where an investigation by the Response Centre has shown that technical support is required to assist with a resolution.

**Completed** – The stage of closed CSR’s.
Problem/Errors type CSR’s

Problem/Errors type CSR’s relate to problems with the customers processing. That is, program error, data error, user error, etc.

General Enquiry type CSR’s

Requests should be logged under this type where a customer has asked a question, needs information, or those requests which cannot be categorised as a Problem/Error or request for Enhancement.

Enhancement type CSR’s

Where a customer wishes to request that Alesco be enhanced due to a perceived lack of functionality or recommended changes in functionality. An enhancement may be either funded by the customer or provided free of charge by Talent2.

An Enhancement request type CSR has to be accompanied by a Business Requirement Specification (BRS) by the customer. This request is received by the Response Centre. The Response Centre ensures that the required documentation is present and complete before forwarding to the Account Manager for the region that the customer initiating the enhancement request resides.

Enhancement Request Approval Process

Refer to the Product Board Guidelines.doc for detailed information on how the enhancement process works.

Summary of procedures

The Response Centre procedures encompass two sets of actions: normal Response Centre procedures and the escalation procedure. The Response Centre procedure is based on decisions, their corresponding actions and the underlying severity rating of the CSR.

The escalation procedure is an independent series of actions that must be carried out, depending on a rigid set of time-based rules. The escalation procedure is defined in detail in this chapter.

The purpose of the escalation procedure is to ensure that significant customer issues are addressed in a timely manner and that management of Talent2 Works is informed. Escalations may entail engaging additional resources from outside the Response Centre. The escalation procedure formalises the way in which this is done.
Please note that the following procedures apply to all CSR’s. However, the timeframes stated apply to all CSR’s below a Severity 1. In cases of Severity 1 situations, the same procedures apply, but customer contact timeframes and target resolution times will differ. Please refer to appendix B for target times associated with Severity 1 situations.

**CSR severity rating**

Talent2 operates a severity ranking system for all customer support requests similar to that employed by many software vendors. This system enables the Response Centre to focus on CSR’s according to the impact the problem is having on a customer’s business processes.

For example, problems that cause the entire application to fail are accorded the highest severity, whereas problems that can be worked around are allocated a lower severity.

By providing information regarding the impact of the CSR to your organisation, you are providing the Response Centre with an indication of the importance you place on the resolution of that problem.

Upon receiving your CSR, the Response Centre will immediately review the CSR and the impact. Once reviewed the severity will be rated from one of the four categories below. If this rating differs from the customers rating, the customer will be advised at time of acknowledgment. If you do not agree with the severity rating allocated please contact the relevant business consultant to discuss the matter. If agreement cannot be reached, the matter can be escalated to the Response Centre Manager.

Details of severity ratings and corresponding target time frames for problem resolution are illustrated in figure 5. All target resolution timeframes exclude where the request is at a stage of Customer Action Required.

<table>
<thead>
<tr>
<th>Severity</th>
<th>Business impact</th>
<th>Definition guideline</th>
<th>Target acknowledgment time frame</th>
<th>Target resolution time frame</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Critical</td>
<td>Payroll does not operate + unable to meet bank disbursement deadlines</td>
<td>1 hour</td>
<td>Work until resolved.</td>
</tr>
<tr>
<td>2</td>
<td>Significant</td>
<td>Employee entitlements (Payroll/Leave) not calculating correctly, no work around is</td>
<td>4 hours</td>
<td>2–8 business weeks</td>
</tr>
<tr>
<td>Severity</td>
<td>Category</td>
<td>Description</td>
<td>Time</td>
<td>Resolution</td>
</tr>
<tr>
<td>----------</td>
<td>-------------------</td>
<td>----------------------------------------------------------------------------------------------------------</td>
<td>--------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>3</td>
<td>Moderate</td>
<td>Problem causing irritation and has some business impact. For important system features a work around is available. For less important features no work around is available.</td>
<td>4 hours</td>
<td>Next scheduled major release + 11</td>
</tr>
<tr>
<td>4</td>
<td>Minimal</td>
<td>Information, request or minor impact only. No work around required.</td>
<td>4 hours</td>
<td>Scheduled for future release</td>
</tr>
<tr>
<td></td>
<td>Enhancement</td>
<td>Customer specific request</td>
<td>4 hours</td>
<td>Future release or paid customisation</td>
</tr>
</tbody>
</table>

*Figure 5* details of severity ratings and target time frames for problem resolution.

Investigation of the CSR and development of a resolution strategy will proceed on the basis of the assigned severity. During investigation, the Response Centre will review the CSR, options for resolution and assess the impact of the options on the product.

A Severity 1 rating is allocated to the following types of issues:

- payroll crashes or a payroll problem that prevents the pay from completing.
- prevents you from meeting legal obligations on time i.e. group certificate processing has failed and it is due to be at the tax department that day.

Note: In this instance an accredited user and appropriate customer support staff (eg:DBA) must also be available at all times to assist the Response Centre until the issue has been resolved. For managed service customers this will also include eHR accredited users that can authorise CCR’s.

Failure to do this will result in the CSR being downgraded to a lower severity.

---

1 Where possible, severity 3 CSR’s are attempted to be resolved in the next scheduled major release + 1. The time is measured from the time the CSR has been replicated by a Response Centre Business Consultant and changed in status to Sent to Development.
A Severity 2 rating is allocated to CSR’s in which the problem affects:
- leave and/or payroll calculations, and
- encompasses a large percentage of your employee base, and
- there is no work around solution available for the problem.
- is critical to ‘go live’ and acceptance sign off.

A Severity 3 issue rating is allocated to:
- software faults that are causing irritation and have some business impact.
- for important system features a work around is available.
- for less important features there is no work around available.
- Severity 3 issues are also subject to Escalations. These escalation procedures can see Severity 3 CSR’s jump ahead of older Severity 3 CSR’s for resolution. This would impact the deliverables of those older Severity 3 CSR’s as resources are redirected to work on the escalated CSR’s. For more information on escalation procedures please refer to Section 5 of this document.

A Severity 4 rating is allocated to:
- minor problems where the impact is minimal
- requests for information.
- product modification requests i.e. enhancement requests.
- Severity 4 issues are also subject to Escalations. These escalation procedures can see these CSR’s jump ahead of older Severity 3 and Severity 4 CSR’s for resolution. This would impact the deliverables of those older CSR’s as resources are redirected to work on the escalated CSR’s. For more information on escalation procedures please refer to Section 5 of this document.

A combination of the severity and product impact will determine the resolution strategy and time frames. Our aim is to resolve the problem quickly and efficiently. Resolution times reflect the maximum time the Response Centre staff expect it will take to resolve the CSR. Resolution of a CSR may mean the provision of a temporary solution or manual workaround.

If you lodge a CSR that is rated by the Response Centre to be a Severity 1 issue and requires immediate action, the Response Centre requires that you allocate staff in your organisation to be available to work with Response Centre staff until the problem is resolved. For managed service customers this will also include users that can authorise CCR’s.

If Response Centre staff attempt to contact your organisation to resolve a high priority CSR and cannot contact the appropriate personnel, within one hour for Severity 1 and four hours for Severity 2, the priority will be downgraded to reflect
this. In this event, the Response Centre will advise you by fax or e-mail. Please ensure that all high severity CSR’s have the details of a contact person who will be available until the problem is resolved.

To ensure action can be initiated immediately, you must raise all Severity 1 issues with the Response Centre in the first instance by phone. For example, payroll crashes should be run through to the Response Centre immediately so that resolution of the problem can commence from receipt of the call. This should then be followed up with a CSR and supporting documentation.

Alesco Response Centre procedures

Raising a CSR

1. The timings for each contact stage in the CSR life cycle, and the resolution times for that CSR, commence from the time the CSR was raised in Alert. In cases where the CSR is initiated via email, delays may occur for transcribing the CSR information into Alert and subsequently actioned, as Alert is the primary mechanism for issue tracking and resolution.

2. When CSR’s are raised in Alert a unique CSR number is assigned. This CSR number is used by the Response Centre when referring to the CSR. All contacts made are recorded in Alert, the issue tracking system that records the date/time and details of the contact. All details are held there permanently for ongoing maintenance and future history of calls.

3. Using Alert, it is the responsibility of all Response Centre business consultants to continually update the system with all actions recorded against the CSR.

4. It is the responsibility of the Response Centre manager to monitor all call traffic to identify any potential problems and determine a course of action to prevent possible time limits from being exceeded.

5. If the CSR does not require any action from the Response Centre, then a message will be passed to the appropriate person or department. If there is any ambiguity, the CSR will be treated as the Response Centre’s responsibility until proven otherwise. Once the appropriate person has been alerted to the customer’s CSR, that person has acknowledged responsibility for responding to the customer.

6. If a phone call is received by the Response Centre and further information is required, it is the responsibility of the business consultant to ensure that a CSR is requested. The business consultant is also responsible for ensuring all relevant information and documentation has been provided.
7. On the raising of a CSR by a customer, it is the responsibility of the business consultant to acknowledge receipt. The business consultant will review the impact assessment of the problem to determine the severity of the CSR. This severity assessment phase is to be completed within 2 hours from the time the CSR was raised. The customer is notified of both receipt of CSR and severity allocated to the CSR.

8. It is the responsibility of the Response Centre business consultant to update Alert to reflect all activities associated with the CSR and forward it to the appropriate area if further action required. Possible courses of action on completion of the review are as follows:

| CSR resolved by the business consultant | Customer notified within 30 minutes. Alert updated and CSR closed. |
| CSR /Business Requirement Specification raised as an enhancement request | Customer lodges Business Requirement Specification and this is forwarded to the Account Manager for the region that the customer initiating the enhancement request resides. |
| CSR raised as a general query | Customer notified and CSR forwarded to the investigation team. |
| CSR raised as a problem/error | Customer notified and CSR forwarded to the investigation team. |

The Response Centre business consultant is responsible for notifying the customer within 4 hours of receipt of a CSR, as to the current status of the CSR and, if investigation is required, any available details/outcomes of investigations to date.

**CSR Investigation Process**

It is the responsibility of the Response Centre to keep the customer up to date in regards to the investigations of the CSR. When the type of problem is still not ascertained, the Response Centre is responsible for the CSR until the cause is determined and the customer notified of the outcome.

It is the responsibility of the Response Centre to update Alert to reflect all activities and outcomes associated with the CSR and to forward the CSR to the appropriate area if further action is required. Possible courses of action on completion of the investigation phase are as follows:

| CSR query resolved by Response Centre | Customer notified of outcome and CSR closed. |
| CSR determined to be an enhancement | Customer lodges Business Requirement Specification and this is forwarded to the Account Manager for the region that the customer initiating the enhancement request resides. |
| CSR determined to be a setup issue | CSR forwarded to account manager for resolution. |
| CSR determined to be a Severity 1 or 2 software | Customer notified and CSR forwarded to the Product Development group for patch to be released. Note: alpha patch may also be |
Processing a software fault

All CSR's that have reached this phase of the CSR life cycle have been determined to be a software fault. The next course of action for the CSR is dependent on the severity. The two courses of action are as follows:

If the software fault is Severity 1 or Severity 2
1. Response centre manager advised of Severity 1 CSR. If product modification required, Product Development Technical Manager contacted and advised.
2. CSR sent to Product Development group for programming changes to be carried out.
3. Product Development verify that details received, technical person assigned to the CSR, and expected time of completion to Response Centre business consultant who is investigating/responsible for the CSR.
4. Alert updated by business consultant of action taken by technical consultant and expected completion time for programming.
5. Where required alpha patch e-mailed or FTP'd to Response Centre, whereby it is then forwarded to customer. Alert updated with relevant details.
6. Please note that in certain circumstances a workaround solution may be implemented directly into the customer’s production site by instructions via email or over the phone.
7. Alpha Patch rolled into CORE by product development group to be included into the next release where possible.
8. If the software fault affects many customers, an alert may be issued to notify all sites by e-mail, and ensure the patch is made available to all customers and location offices. (See appendices A and B for resolution targets).

If the software fault is Severity 3 or Severity 4
1. CSR sent to product development group for inclusion into a future release. Alert updated and customer informed.
2. With the information provided by the Product Development Group, the Product Development Manager is responsible for advising customers of expected future releases and their content in respect to resolution of Severity 3 & 4 CSR's.
3. Once the CSR is provided in a release from the product development group and acceptance tested by the Response Centre, Alert can be updated with the relevant release number and the CSR closed.
Processing an enhancement

An Enhancement request type CSR is raised in Alert accompanied by a Business Requirement Specification by the customer. This request is received by the Response Centre. The Response Centre ensures that the required documentation is present and complete before forwarding to the Account Manager for the region that the customer initiating the enhancement request resides.

Enhancement Request Approval Process

Refer to the Product Board Guidelines.doc for detailed information on how the enhancement process works.

Customer support review and escalation procedures

To ensure a speedy and effective response to CSR’s, each CSR is given a severity based on the sensitivity of the fault and the customer’s advice of its impact. All severities have a standard set of time-based rules to be met during the CSR’s life cycle. These targets reflect reasonable time-limits within which customers can expect both updates on the CSR and resolution of the problem. The Response Centre Coordinator formally reviews open CSR’s on a regular basis.

With all Severity 1 CSR’s raised, the Product Development Manager and local Account Manager/General Manager will be notified immediately.

If at any time you are wanting to escalate a CSR, or do not agree with the severity rating determined by the Response Centre, please contact your local Account Manager or the Response Centre (via e-mail or phone) and provide details of requirements for CSR escalation.

The following process occurs once your call has been taken by the Response Centre business consultant.

- Response Centre business consultant updates Alert to reflect request to escalate CSR. Response Centre business consultant is empowered to escalate the severity of a CSR. If in the communication provided to the Response Centre business consultant it is determined to be sufficient grounds for the CSR to be escalated, the Response Centre business consultant will contact the Product Development Manager and discuss options available to reassess the priority.

- If assistance is required to determine if escalation should proceed, the Response Centre business consultant will liaise with the Product Development Manager. The Product Development Manager will then determine if an upgrade is warranted. This may involve further communication and negotiation with the customer.
The associated Account Manager will be contacted if agreement can still not be reached to escalate the CSR. If required the matter will be escalated to the highest level – National General Manager or Chief Technology Officer for ruling.

If at any of the above stages escalation is determined to be invalid, it is the responsibility of the owner of the CSR at that escalation level (i.e. Response Centre business consultant, Response centre manager, Account Manager, Chief Technology Officer, National General Manager) to contact the customer and discuss the outcome and decision made. If at any time the customer is not happy with the decision the matter should be escalated to the next level of escalation. The customer will be contacted to advise of the status and/or discuss alternative options.

If escalation is agreed, the Response Centre business consultant is to contact the Product Development Group and negotiate priority restructure and possible courses of action.

The Product Development Group is to advise the response consultant expected delivery date for an alpha / emergency / formal patch.

The Response Centre business consultant is to update Alert and contact the customer by phone/e-mail with the relevant information.

Product Development Group to forward the patch to the Response Centre who will then forward onto the customer and update Alert.
Glossary of terms

**Account manager.** Nominated consultant assigned to each customer. Responsible for maintaining customer satisfaction and ensuring customer receives updates on CSR’s and updates on releases.

**Accredited user.** Each customer site will nominate at least 2 accredited Alesco users of their system. All contact with the Customer Response Centre should be by an Accredited User. The Accreditation process is conducted by Alesco client services group.

**Alert.** This is the software used by the Alesco Response Centre to log and track all CSR activity.

**Alpha patch.** A work order that is released to a specific customer outside of the pre production patch or in a Minor/Major release mechanisms. Generally this is to resolve specific Severity 1 or Severity 2 issues.

**CCR. Change Control Request.** A CSR with a type of CCR logged in Alert instructing e.HR to make changes to the managed service customers production environment. The CCR must be accompanied by an email (with reference to the CCR Alert CSR number) from a person authorised to raise a CCR.

**CSA.** Consulting services agreement—a written agreement to be signed and returned to Talent2 Works, prior to the commencement of the project/task. The consulting services agreement is the official authority for the consulting work carried out and provides the basis for invoicing.

**CSR.** Customer Support Request—a form used to lodge a request for support assistance in investigating and resolving a problem with the product.

**Customisation.** Customer-specific functionality paid for by the customer. Customised functionality may be included into core product in a future release/version.

**FTP Site.** The Talent2 Works FTP site is for use by customers to obtain software releases and other information.

**Release notes.** Documentation detailing the contents of a release that lists each program modification and customer support request that has been addressed. Available with all software releases, including pre production patches, release notes are located separately in a release document directory on the FTP site.
**Response Centre Business Consultant.** The person nominated within the response Centre to be first line support. It is the Response Centre business consultants responsibility to acknowledge the customer support request (CSR), assess the priority of the CSR, acknowledge receipt of the CSR and forward the CSR and relevant details to the appropriate department (or person) within the Response Centre or Talent2 Works. The person nominated to investigate and analyse customer support requests. It is the business consultants responsibility to determine the nature of the customer support request and report back to the customer regarding the outcome of the investigation. The business consultant then either closes the customer support request or forwards it to the appropriate department for action.

**Response Centre Handover.** Immediately prior to a customer going ‘live’ on Alesco, the attending implementation consultant/project manager ensures that a ‘hand over’ to the Response Centre is conducted. The Response Centre is advised of key contact people at the customer site, accredited users, number of employees etc.

**Severity 1.** To be classified as Severity 1, an issue must be a critical problem that either prevents legal obligations from being met on time or payroll processing from completing on time.

**Severity 2.** To be classified as Severity 2, an issue must be a payroll-related problem that affects a large percentage of employees, be time critical, have a severe impact on the company, and have no work-around available.

**User guides.** User documentation provided for each module, detailing the functionality of each program and report in the module.
## Appendix A

### Target timeframes for contacting customer

<table>
<thead>
<tr>
<th>Customer related actions</th>
<th>Alesco Response Centre response and actions</th>
<th>Maximum timeframes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call received from customer</td>
<td>1. CSR raised in Alert if it does not already exist.</td>
<td>During call</td>
</tr>
<tr>
<td></td>
<td>1.1 Query resolved during call. Update Alert.</td>
<td>During call</td>
</tr>
<tr>
<td></td>
<td>2. Call could not be resolved in the duration of the call.</td>
<td></td>
</tr>
<tr>
<td>Customer notified.</td>
<td>2.1 Resolve query if not requiring further action or investigation from other areas. Notify customer and update Alert. Close CSR.</td>
<td>30 minutes</td>
</tr>
<tr>
<td>Customer to send CSR.</td>
<td>3. Request a CSR be sent with supporting doco.</td>
<td></td>
</tr>
<tr>
<td>CSR received via Web Alert Services.</td>
<td>4. On receipt of CSR determine priority. Send notification of receipt of CSR and assessed severity rating and update Alert.</td>
<td>2 hours</td>
</tr>
<tr>
<td>Customer notified.</td>
<td>5. Forward to relevant area and update Alert. Notify customer of status of CSR.</td>
<td>4 hours</td>
</tr>
<tr>
<td>Customer notified.</td>
<td>6. Notify customer of CSR status. Update Alert.</td>
<td>2 days</td>
</tr>
<tr>
<td></td>
<td>6.1 If CSR resolved as a result of investigations, notify customer and update Alert. Close CSR.</td>
<td></td>
</tr>
<tr>
<td>Customer notified.</td>
<td>6.2 Provide update on status of CSR to customer, such as – outcomes of investigations, results of Product Panel meetings, expected delivery dates of patches, scheduled release number etc. Update Alert.</td>
<td>2 weeks</td>
</tr>
<tr>
<td>Customer notified.</td>
<td>6.3 Provide update on status of CSR to customer, such as – outcomes of investigations, results of Product Panel meetings, expected delivery dates of patches, scheduled release number etc. Update Alert.</td>
<td>8 weeks</td>
</tr>
</tbody>
</table>
## Appendix B

### Target resolution times

#### CSR’s requiring product modification

<table>
<thead>
<tr>
<th>Severity</th>
<th>Actions</th>
<th>Target Resolution Timeframes</th>
</tr>
</thead>
</table>
| 1        | Once a Severity 1 call is received, a CSR is raised and the Response centre manager notified. A business consultant is assigned and work commences immediately.  
Customer to be contacted every 15 minutes until strategy decided, then contact every 30 minutes thereafter until resolution of problem OR until customer is satisfied that the CSR is being actioned appropriately. | Work until resolved.  
Notification of Severity 1 issue received during business hours. |
| 2        | Follow standard support procedures. Provide work around solution or patch to the customer. Patch provided by product development team and incorporated into next release.                                      | 2 – 8 business weeks.       |
| 3        | Follow standard support procedures. Send to product development. Notify customer when release date assigned.                                                                                      | Where possible next major release + 1² |

² Where possible, severity 3 CSR’s are attempted to be resolved in the next scheduled major release + 1. The time is measured from the time the CSR has been replicated by a Response Centre Business Consultant and changed in status to Sent to Development.
Appendix C

Payroll checklist

In the payroll setup area, check the following:

• Is the default salary paycode defined as a valid paycode?

• Are the payroll defaults set up?

• Is the paygroup correctly defined?

• Are all the control defaults set up correctly?

• Do the job snapshots reflect the periods expected to be paid?

• Was information entered after the payrun definition cutoff time?

• Are the tax scales set up for the correct pay code?

In the employee detail areas, check the following:

• Is the employee approved for the paygroup?

• Has the employee already been paid for this period in advance?

• Is the employee on automatic pay? If not, does the employee have valid timesheets for the period?

• Have the employee’s timesheets been entered/generated and confirmed?

• Does the employee have a tax file number?

In order to establish whether or not an error has occurred in the payroll processing, it is necessary to have the following details and relevant printouts at hand when you call the Response Centre:

• An accurate statement of the expected pay outcome for each affected employee.

• A detailed breakdown of the actual payments generated for each affected employee.

• Descriptions of any special conditions applying to each employee (eg special roster, special classification or occupancy type, agreed rate over-rides, etc.).

• Any theories or suspicions you may have about the cause of the problem (eg, appears that only employees with surnames beginning with “T” are not being paid).

• A screen print of FC425 - pay group definition (showing the paygroup being processed).

• A screen print of FC749 - pay run definition (showing the pay run being processed).

• A screen print of FC039 - employee occupancies and allowances, and any other relevant forms from this chain.
• A screen print of FD525 - employee job payment history display.

• Output from RC806N/R - payroll processing exceptions showing the pages relevant to each affected employee.

• A ‘trace file’ for RC806N/R - payroll processing exceptions (this can usually be found in your personal file area with a file name something like ‘RC806N[nnn].TRC’, where ‘nnn’ is the terminal ID of the user who initiated the program)

Note: RC806N is the normal payroll processing program, whereas RC806R is the payroll processor with retrospective processing. Where ‘retro’ has not been run, only RC806N will be relevant. Where ‘retro’ has been run, the details for both RC806N and RC806R will be required.

If retrospective payments are involved, the following additional information should also be available:

• Output from RC922 - retrospective employee search (only pages for relevant employee(s)).

• Output from RC923 - retrospective payments report (only pages for relevant employee(s)).

• Trace file for RC922 - retrospective employee search (only pages for relevant employee(s)). See above for how to locate this file.

• Trace file for RC923 - retrospective payments report (only pages for relevant employee(s)). See above for how to locate this file.

• Was FD418 - retrospective list override - used to insert employees for retrospective processing?

Where relevant to the particular situation being experienced, it may also be necessary to have the following information available:

• A screen print of FC924 - timesheets (only if timesheets are involved).

• A screen print of FC811 - manual payments (only if manual payments are involved).

• A screen print of FC817 - tax scale definition (only if tax calculations are being queried).

• A screen print of FL625 - roster definition (only if the employee is on a roster).
Leave checklist

In the leave setup area, check the following:

- Are you using pre-calculated leave balances? If yes, when was the last time RL622 - create current bulk leave balances was run?
- Is the CON_DEF setting ‘FUTURE_BOOKINGS’ set to ‘Y’ or ‘N’?
- Is the CON_DEF setting ‘LV_CONSISTENT’ set to ‘Y’ or ‘N’?
- For each affected leave code, obtain a print-out of the contents of FL610 - leave code definition.

For each affected employee, you will need to know the following information:

- Is the employee entitled to the leave?
- Is the employee’s position fraction something other than 100%?
- Are your leave rules set up correctly?
- Is the public holiday calendar set up correctly?
- Do the job snapshots reflect the periods expected to be paid in advance?
- Is the employee currently on leave?
- Does the employee have other leave bookings?
- What is the employee’s employment status?

In order to establish whether or not an error has occurred in the leave calculator, it is necessary to have the following details and relevant printouts at hand when you call the Response Centre:

- An accurate statement of the expected outcome of the leave transaction.
- A statement of the actual leave as calculated by the system, with problem areas highlighted.
- A description of any special conditions applying (eg special roster, classification, etc.).
- Any theories you may have about the cause of the problem.
- For each affected leave type:
  - A screen print of FL610 - leave code definition.
  - A screen print of FL611 - leave formula definition.
  - A screen print of FL612 - leave rule definition.
  - A screen print of FD996 - leave code sets.
- For each affected employee:
  - A screen print of FL601 - leave entitlements (all pages).
A screen print of FL600 - leave enquiries accruable (at start date of booking).

* A copy of the calendar to which the employee is attached (if the problem relates to public holidays).

• A ‘trace file’ for RL622 - leave processor (this can usually be found in your personal file area with a file name something like ‘RL622[nnn].TRC’, where ‘nnn’ is the terminal ID of the user who initiated the program).

If the problem is related to leave that has not been paid by the payroll processor, the following checks should be made before calling the Response Centre:

• Has the leave booking been confirmed?
• Has the leave booking been reversed?
• Is the leave code also defined as a paycode?
• Has the employee previously been paid for this leave?
Appendix D
Customer Service Request form – where Alert Web Services is not available

All formal customer support requests should be made via Alert Web Services and this is the preferred method – please refer to Alert Web Services.doc for more information. If for some reason Alert Web Services cannot be made available to you, you should use the Alesco Customer Service Request form, commonly known as a ‘CSR’. An example of the CSR form is shown at the end of this appendix.

Please note if you are lodging an enhancement request, a Business Requirements Specification Document must be completed along with a CSR and forwarded to the Alesco Response Centre. An example of the BRS form is shown at the end of this appendix.

See Appendix D for an example of this document. Refer to Lodging an Enhancement, in this chapter, for a more detailed explanation of the enhancement form.

After you have used the customer support request checklist to identify the information you need to supply, complete the Customer Service Request form. We recommend you allocate an internal customer reference number for your own tracking purposes for each CSR you raise.

Submit the completed CSR form to the Response Centre by e-mail or fax, including with the CSR any supporting documentation. In the event that the initial notification of the problem occurs via telephone, you will be asked a series of questions to establish the severity of the CSR. These questions are the same as those on Page 1 of the Customer Support Request document. Please refer to Appendix D for an example of the CSR. A business consultant will be assigned to the CSR and will respond to you. You will also be asked to send an e-mail or fax copy of the completed CSR and any supporting documentation to assist further investigation of your problem.

The Alesco Response Centre raises a CSR in Alert including the addition of a severity rating, and will advise you of these details by e-mail or fax. The Alesco Response Centre will then proceed to resolve the CSR according to the Talent2 Works procedures and service level agreements.

The CSR form consists of three pages. Pages 1 and 2 are for completion by you. Page 3 is completed by the Alesco Response Centre team member attending to your Customer Service Request.

As indicated in figure 2, the first page of the CSR form records the essential customer, impact assessment and application details required to allow the Alesco Response Centre to accurately record and classify the Customer Service Request.
Figure 2  Details required to be entered by you on page 1 of the customer support request form.

Customer details

In the 'company name' field, insert the name of your organisation as it appears on correspondence from Talent2.

In the 'customer reference #' field, enter the identifying number you have assigned internally to the problem.

In the 'date CSR sent' field, enter the date on which the CSR was lodged, not the date on which the problem first arose.

In the 'logged by phone?' field, highlight the YES option if the request has already been raised by telephone prior to the CSR being sent. If that is the case then a CSR number will have already been allocated to the call and this CSR number should be quoted in the 'if yes, log # of CSR' field (located immediately below the 'logged by phone?' field).

In the 'customer contact' field, enter the full name of the person the Response Centre should call to discuss the details of the CSR. This person should have all relevant detail available to them. Also provide telephone, fax numbers and e-mail address for this person in the 'telephone #' and 'facsimile #' fields.

Upon delivery of this document to the Response Centre, a CSR will be raised, and the number will be conveyed to the customer via email. It is recommended that this CSR number be used in all references and correspondence with Talent2 Works, as customers
internal reference numbers will not be used or referenced by Talent2 Works.

Impact assessment

This section provides information on how critical the problem is and what impact it has on your organisation. The questions asked help the Response Centre to rate the severity of the problem and determine a resolution schedule for the CSR. All CSR’s are categorised into one of four severity classes, with Severity 1 CSR’s being the highest priority, through to a Severity 4 CSR, which is classified as a low priority software fault or enhancement request. Within each of these categories, further impact assessment is required in order to prioritise and schedule these CSR’s. To this end, all impact assessment questions should be answered, with any other relevant information that may assist in determining the severity also being provided. Factors taken into account when rating a CSR may include whether the problem prevents you from processing a pay; whether the problem prevents you from meeting legal obligations; how many employees it affects; if there is a work around available to the problem; is this a go live issue; is the problem occurring in production or test environment.

Application details

This section records the details of the Alesco HRIS module to which the CSR is related and allows the CSR to be quickly allocated to a business consultant with the appropriate expertise to resolve the problem.

In the ‘version’ field, enter the version number of the program you are using. This can be identified from the field in top left corner of the Alesco HRIS screen, as illustrated in figure 1. This number is critical and must be provided, since a problem may be version-specific.

In the ‘module’ field, enter the grouping in which the program resides, usually referenced from the main menu of Alesco HRIS; for example, personnel, payroll or leave. If uncertain of which product is involved, contact your systems administrator or application manager.

The ‘menu no.’ field records the number, and the ‘menu name’ field records the description, from which Alesco HRIS menu the module or function concerned was launched.

In the ‘program(s)’ field, enter the identifying number(s) of the actual form or report to which the CSR is related. This is usually a three digit number with a one or two character prefix (for example, FC452). Country-specific programs have two or three letters appearing after the program number (for example, RE290HK) to identify the relevant country (in the example, ‘HK’ indicates the program is Hong Kong-specific). The program number may also be read from the menu, in most cases, by recording the numbers in the second column after the menu option number.

The program revision number is located in the top left hand corner of the screen or program and should be quoted at all times. The screen location of the program revision number is illustrated in figure 1.
In the ‘program name’ field, enter the name of the program you are raising the CSR against. Figure 1 illustrates where the program name may be identified.

In the ‘supporting doc attached’ field, highlight the YES option to indicate if additional supporting documentation is attached to the CSR.

### Supporting documentation

Supporting documentation may comprise trace files, screen dumps, reports, test scenarios, or similar material that you have been asked to provide with the CSR or which you believe may assist in its rapid resolution.

A trace file is a special file generated by many Alesco HRIS modules and is stored in your personal directory on the host computer. See appendix C for more information about trace files.

A screen dump is a printed copy of an Alesco HRIS screen which is usually created by pressing the <PRINT> key in Alesco HRIS or the <PRINT SCREEN> key of your PC terminal.

A report is something Alesco HRIS generates on request, like a payroll exception report, from a menu option or process chain.

A test scenario is a script used for formally testing a particular function and usually includes the details of all information entered before the function was launched.

In the ‘total number of pages’ field, enter the total number of pages emailed/faxed/posted to the Response Centre, including the two pages of the CSR form.

Leave the ‘CSR rating’ field blank. The Response Centre team member determines the CSR Rating at the time of receiving the CSR. The CSR rating is based on the responses given in the impact assessment section of the CSR. This rating is advised at the time of acknowledging receipt of the CSR. Please take care to accurately classify your CSR and describe the severity of the impact of the issue on the organisation.

For a more detailed explanation of the layout of menus and screens, refer to the ‘before you begin’ section of the relevant Alesco HRIS user guide.

As indicated in figure 4, the second page of the CSR form provides for entry of a description of the problem and a description of the investigation taken on site.
Problem description

In the 'problem description' section, enter full description of the problem. The more detailed this information is, the greater the chance of resolving and understanding the problem quickly. Without this information, the Response Centre cannot accurately determine the cause of the problem, thereby slowing down the resolution process. Please attach additional pages to the CSR if required to describe the problem in full.

Description of investigation taken

In the 'description of investigation taken' field, enter details of the steps already by you to investigate the problem. This assists to narrow the focus of the investigation and assists in reducing the amount of time taken to investigate the problem. Please provide as much detail as possible, even if you think it's unrelated or of no importance. Often times, what has seemingly looked to be an unrelated incident or minor step in the process has in fact had a bearing on the cause of the problem, or at least factors into providing clues as to what the cause of the problem may be. We understand that at times this can be a time consuming and frustrating process to detail step by step what seems to be a straightforward problem, but this really can assist all parties in determining the problem. We thank you for your co-operation in providing these details.
# Customer support request

## Customer details

<table>
<thead>
<tr>
<th>Customer name</th>
<th>Customer reference #</th>
<th>Date CSR sent</th>
<th>Logged by phone?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>YES / NO</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Customer contact (full name)</th>
<th>Telephone #</th>
<th>Facsimile #</th>
<th>If yes, log # of CSR</th>
</tr>
</thead>
<tbody>
<tr>
<td>(</td>
<td>(</td>
<td>(</td>
<td></td>
</tr>
</tbody>
</table>

## Impact assessment (please attach additional pages, if required)

<table>
<thead>
<tr>
<th>Does this problem prevent you from running/processing the pay?</th>
<th>YES / NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does this prevent you from meeting legal obligations?</td>
<td>YES / NO</td>
</tr>
<tr>
<td>Describe the legal obligation that must be met? (Please enter information below)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>How many employees does this affect?</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>What percentage of your employee base does this affect?</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Are you able to work around the problem?</th>
<th>YES / NO</th>
</tr>
</thead>
</table>

Please describe below, the workaround you are currently using and how long this workaround takes.

<table>
<thead>
<tr>
<th>What impact is this issue having on your organisation? (Please enter information below)</th>
</tr>
</thead>
</table>

## Application details

<table>
<thead>
<tr>
<th>Version (eg V8.03.001.02)</th>
<th>Module (eg personnel)</th>
<th>Menu no.</th>
<th>Menu name</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Program(s) (eg RC806)</th>
<th>Program revision no. (i.e. if &gt; V8.03) eg 8.1.1 (located in top left hand corner of screen)</th>
<th>Program name(s)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Supporting doc attached</th>
<th>Total number of pages</th>
<th>Log number</th>
<th>CSR rating (office use only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES / NO</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Problem description

(please attach additional pages, if required)

<table>
<thead>
<tr>
<th>Describe the problem</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>(Please include details of: Error messages encountered; How calculations differ; What should have happened.)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>How often does the problem occur?</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Can you recreate the problem at will?</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>If yes – please list the steps taken to recreate the problem.</th>
<th></th>
</tr>
</thead>
</table>

### Description of investigation taken

(please attach additional pages, if required)

<table>
<thead>
<tr>
<th>Please describe actions taken to investigate or resolve the problem.</th>
<th></th>
</tr>
</thead>
</table>
## Customer support request

### Office use only

### CSR details

<table>
<thead>
<tr>
<th>Alesco CSR #</th>
<th>Acknowledgment date &amp; time</th>
<th>CSR rating</th>
<th>Reviewed by -</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Is call within standard maintenance hours?</th>
<th>If No, Proceed with call on T&amp;M charges?</th>
<th>If chargeable enter CSA number</th>
<th>Date &amp; time signed CSA returned.</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES / NO</td>
<td>YES / NO</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Is caller accredited?</th>
<th>Proceed with CSR if non accredited caller? Y/N</th>
<th>If chargeable enter CSA number</th>
<th>Date &amp; time signed CSA returned</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES / NO</td>
<td>YES / NO</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Enhancement?</th>
<th>Date to product panel</th>
<th>Outcome of panel review</th>
<th>Date customer advised</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES / NO</td>
<td></td>
<td>CORE / NON – CORE / CLOSE</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Software fault?</th>
<th>Date to product development group</th>
<th>Date CSR logged as a PAR in product development</th>
<th>PAR#</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES / NO</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Supporting documentation  *(Please list all screen dumps attached or requested to be sent)*

<table>
<thead>
<tr>
<th>Trace file(s)</th>
<th>Screen dump(s)</th>
<th>Reports</th>
<th>Other attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>List trace files attached</td>
<td>List screen dumps attached</td>
<td>List report outputs attached</td>
<td>List other attachments</td>
</tr>
</tbody>
</table>

### Outcome of support investigation  *(i.e. summary of investigation, is further assistance reqd, if so please state)*

---

This document is maintained in electronic format only. Printed versions are assumed to be non-current.
Customer support request form

The customer support request form consists of three pages. Pages 1 and 2 are completed by the customer. Page 3 is completed by the Response Centre.

Full size samples of these pages are included as the last pages of this handbook. If required, these can be photocopied for use at your site.

Enhancement Request – including Business Requirements Specification

An enhancement request must be accompanied by a Business Requirements Specification form and is available on the Talent2 Works FTP site. The form consists of three pages. Pages 1 and 2 are completed by the customer. Page 3 is completed by the Response Centre.

Full size samples of these pages are included as the last pages of this handbook. If required, these can be photocopied for use at your site.
**Business Requirements Specification**

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Customer Reference #</th>
<th>Date BSR Sent</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Customer Contact (full name)</th>
<th>Telephone #</th>
<th>Facsimile #</th>
</tr>
</thead>
</table>

**Business Objective** – The objective or purpose that will be achieved by the delivery of this addition or change to Alesco core software.

**Functional Description** – The description of the desired functional addition or modification to the core software. Include business processes associated with the Enhancement. These can be documented as Flow diagrams if desired.

**Data Inputs** – A description of new/modified data elements which will be input to Alesco as a result of the Enhancement. Each element will be defined including:

- **Definition:**
- **Relationships to other data elements:** *e.g. value calculated from other data.*
- **Attributes (e.g. max/min size and data type):**
- **Validation Rules:** mandatory requirements etc

**Data Outputs** – A description of new and or modified data elements which will be output from Alesco as a result of the Enhancement. Each element will be defined including:

- **Definition:**
- **Relationships to other data elements:**
- **Attributes (e.g. max/min size and data type):**

**Application Details**

<table>
<thead>
<tr>
<th>Version (e.g. V8.03.001.02)</th>
<th>Module (e.g. Personnel)</th>
<th>Menu No.</th>
<th>Menu Name</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Existing Program(s) affected by Enhancement</th>
<th>Program Revision No. (i.e. if &gt; V8.03) e.g. 8.1.1 (located in top left hand corner of screen or report)</th>
<th>Program Name(s)</th>
</tr>
</thead>
</table>

---

This document is maintained in electronic format only. Printed versions are assumed to be non-current.
### Suggested Solution Design:
The suggested or recommended design of the solution to meet the business objective of the Enhancement Request. The design will include suggested implementation images of any new or modified Forms or Report layouts.

### Special Testing Required:
Any special testing requirements which will help ensure that the software meets the business objectives and passes validation requirements. For complex solutions these can be documented as test case scenarios where the business function is complex. The provision of test cases can help in the testing of the function. Test Cases will include: Guidelines on how to test the function and a set of test data.

### Advantages to the Product:
The advantages to the core Alesco product by inclusion of this Enhancement are to be described. Benefits relative to existing product functionality should be included. References to existing features of other marketplace products can also be listed if applicable.

### Advantages to Customers:
Please describe the advantages of this change to both you and/or the existing customer base. Please describe in terms of business benefits, productivity improvements and cost savings.

### Performance Guidelines:
Some business functions require a certain level of performance from the system in order to be most effective. Please describe the manner in which the performance should be measured and any varying factors. These will be used in the design and build phases for an application.
## Business Requirements Specification

### OFFICE USE ONLY

<table>
<thead>
<tr>
<th>CSR #</th>
<th>Acknowledgment Date &amp; Time</th>
<th>CSR Rating</th>
<th>Reviewed by -</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>4 – Enhancement</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sent to PQA Group on:</th>
<th>Acknowledged as Received by PQA.</th>
<th>Enhancement Category</th>
<th>Work done on T&amp;M?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YES / NO</td>
<td>CAT 1 / CAT 2</td>
<td>YES / NO</td>
</tr>
</tbody>
</table>

Product Comment Group and PQA comments.

<table>
<thead>
<tr>
<th>Enhancement Approved?</th>
<th>Date to PQA Group</th>
<th>Outcome of Panel Review</th>
<th>Date Response Center Advised of</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES / NO</td>
<td></td>
<td>CORE / NON – CORE / CLOSE</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date Customer Advised of Outcome</th>
<th>Date to Product Development Group</th>
<th>Date CSR Logged as a PAR in P.Dev</th>
<th>PAR#</th>
</tr>
</thead>
</table>

Development Scheduled for Release

Assigned to:

Additional Comments:
Appendix E

Alesco accreditation
A guide for application administrators

The separate guide Alesco *Accreditation: A Guide for Application Administrators* is reproduced within this handbook for your convenience.
Alesco
Accreditation

A Guide
for
Application Administrators
Why do you need accredited users on site?

The spirit of the accreditation process is to ensure customers maintain the necessary skills to operate Alesco HRIS and are able to expertly liaise with the Response Centre to swiftly resolve problems.

No matter how good an application is, unforeseen circumstances can result in system problems.

This invariably happens at the worst possible time: when a payroll is processing, or when you most need the report or information that you have requested.

It is then that you need to be able to act quickly to resolve the glitch and get on with the job.

Problems can be more efficiently resolved or avoided by having a person on hand who knows:

- how to identify and subsequently discuss Alesco application issues;
- where to find the information that the Response Centre might need and have it ready when the CSR is raised;
- where and how to check for a quick and simple solution to the problem;
- what makes it easier and faster for you to be up and running again, or better still, to avoid having the problem occur in the first place.
**Who should be the accredited persons?**

Ideally, the application administrator, and the payroll manager should be accredited. If these roles are both filled by the same person, then whoever steps into that position when they are absent would be the second nominee.

It is important that whoever fills the role has a thorough understanding of the Alesco setup for their site as well as Alesco processing methods.

**How does a user become accredited?**

Alesco user accreditation involves an audit of basic competencies in the core applications of personnel, payroll and leave, plus any other competencies specific to your setup.

On a new site, the audit will form part of the implementation process.

The audit is carried out by the Alesco business consultant who is the account manager assigned to your site.

It involves a one day site visit, during which the auditor will ask the nominee to carry out certain tasks to demonstrate competency in each of the listed units of competency.

If the auditor is satisfied that the nominee is fully competent, a certificate is issued and the Response Centre lists that person as an accredited user for the site. Should the auditor consider that the person is not fully competent, he/she will recommend a suitable training program. After the training program, another visit is organised to re-audit the previously deficient units of competency.

Once accreditation is granted, the process will need to be re-visited if the person leaves and is replaced, or the application is up-graded, or new modules or facilities added.
**What are the basic competencies upon which you will be audited?**

The basic units of competency cover Alesco configuration and the core Alesco areas of personnel, payroll and leave. Competencies are typically achieved by attending Alesco training and/or subsequent experience.

The auditor will ask the nominee to demonstrate competency in each unit and will mark off each one against a checklist.

The units of competency are as follows:

1. Understands how SUB/CON/HDA processing works;
2. Knows the differences between all the employment status rules and how/when you would use them;
3. Has an understanding of the function of clevels;
4. Knows how to set up a calendar and understands how the main calendar differs from a location calendar;
5. Has an understanding of how position fraction is calculated and how that affects payments;
6. Knows the difference between agreed rate employees and award/class employees;
7. Knows how to delete an employee from the system (if mistakenly entered);
8. Knows how to alter the start date of an occupancy (if mistakenly entered);
Personnel (continued)  

9  Knows how to set up an occupancy, commencing with new hire and including allocating allowances, deductions, tax record, leave entitlements, approve for payment, enter disbursement details.

10 Understands the significance of code rules and why/when/how you would use them.

11 Understands how aggregate percentage applies to occupancies.

12 Has an understanding of when to use an offset on a roster against an occupancy.

13 Is able to add/modify award classification records.

Payroll

1  Knows where to find trace files and what to look for if there are errors in the file.

2  Knows how/when/where to run an exception pay.

3  Has an understanding of how/when/where to run an offline pay/manual payment.

4  Is able to correct an overpayment when the employee has repaid the overpayment by cheque.

5  Understands how job snapshots work and when to look at them.

6  Knows how and when to force someone into retro list override.

7  Knows how to check if payrun has completed processing.

8  Knows how to process backdated pay increases.

9  Knows the steps for processing a payroll from start to finish.

10 Is able to set up a loading to pay against each booking OR pay once yearly if applicable to that site.
Payroll (continued)

11 Understands the difference between termination balance codes.
12 Knows how to set up rosters, covering payment rules through to timesheet generation and confirmation if applicable to that site.
13 Has an understanding of how retro processing works.
14 Knows how to reverse out a timesheet entry.
15 Knows the difference between mandatory and optional allowances and the differences between pay types.
16 Is able to terminate an employee.
17 Is able to reinstate an employee to reverse a termination.
18 Is able to analyse payroll to ensure payroll balances i.e. analysing exception messages, finding imbalances, etc.
19 Knows when/where/how to investigate imbalances in payroll / general ledger / retro.
20 Understands how general ledger processing works.
21 Knows from where in the system all the account details are created and how they are calculated in the pay.
22 Knows the steps to follow when a pay crashes in order to provide the correct data to the Response Centre and conduct pre investigation of the problem.
23 Is able to remove employees from pay runs when you don’t want to pay them.
24 Is able to process group certificates for employees.
Leave

1. Knows the difference between pre-calculated and non-pre-calculated leave balances.
2. Is able to reverse/delete leave bookings.
3. Is able to create leave codes, attach formula, allocate entitlements and book leave for employees.
4. Is able to explain how the leave flags on leave code definition work.
5. Understands the functionality of fields on the leave formula form.
6. Knows how to do leave adjustments and why/when you would use them.
7. Understands the leave rule definition screen and how LWOP applies to accruable leave.
8. Is able to alter leave bookings if an employee has a change of mind and comes back earlier or extends the leave period.
9. Is able to set up and pay advance leave in the system.
10. Is confident in the use of setting up leave entitlements for employees, using page 2 and 3 of the form (FL603), when and where required.
11. Is able to set up termination leave codes.
Other modules

If you have separate departments responsible for modules such as statistics, budgets, occupational health and safety, then the ‘expert’ for each module should be available along with the accredited user when the Response Centre is contacted.

For example, the nominated stats user and the accredited user should both be available when a problem in the stats module is reported.

If, on the other hand, the customer site does not have these functions segregated, the accredited user is responsible for all modules and should have an expert level of knowledge in their functionality.

What if you have no one fully competent and need training?

Talent2 Works will hold user accreditation workshops on an “as needs” basis. Attendance will be charged at the public course rate of $450 per person per day.

Workshops will be scheduled whenever there are eight people from various organisations requesting training at a particular Talent2 Works education centre. We can also offer one on one or one on two training by a consultant on site at the usual Talent2 Works consultancy rates.

Initial Alesco training is available at Talent2 offices or on site. To discuss your training needs and to arrange training for your staff, please contact your Account Manager.

Appendix F

Handover procedure

Including form used in handover.

Handover to the Response Centre generally takes place after 2 or 3 pay cycles. Prior to Handover the customer is supported at local/project level.

The following document is completed by the implementation project manager in conjunction with the customer, and returned to the Response Centre.
# Handover from Consulting to Response Centre

## Customer Information

| Customer Category e.g. In House, ASP or Bureau |  |
| Customer name |  |
| Physical address |  |
| Postal address |  |
| Phone number |  |
| Fax number |  |

### Key Contacts

- **e.g.** CEO
- HR Manager
- Payroll Supervisor
- Inhouse DBA

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Company Title</th>
<th>Phone &amp; Mobile</th>
<th>e-mail</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Deployment Method

- **e.g.** Web
- Client Server
- Character

### Version of Alesco

- **e.g.** e807 patch 1

### Version of Database

(Not for Bureau or ASP)

- **e.g.** 9.2.0.X

### Hardware/Software Configuration

(Not for Bureau or ASP)

<table>
<thead>
<tr>
<th>Server Operating System e.g. Unix, Linux, Win2000, Win2003</th>
<th>Server Hardware</th>
<th>Client Operating System e.g. Win2000/Win XP</th>
<th>Forms &amp; Reports Patchset e.g. 9.0.4, 10.1</th>
<th>IAS Version e.g. 9.0.4.2, 10.1.0.2, 10.1.2.2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| **Telnet/modem access**  
| (Not for Bureau or ASP)  
| Is telnet access available?  
| If yes provide details  
| e.g. telnet address/ dialup number, passwords, connect method, special software required)  
| **Modules purchased**  
| (Not Bureau)  
| **Number of employees in system**  
| e.g. headcount |
## Appendix G

**Current professional service fees**

Prices current as at 01.07.2007

(All rates are expressed in Australian dollars (AUD). International customers will be charged the AUD equivalent at the time the service is performed.)

<table>
<thead>
<tr>
<th>Service</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Correction of customer-induced error OR Call to Alesco Response Centre by non-accredited caller OR Customer requests continuation of customer support work past 5.30pm local time</td>
<td>Time and materials $300 per hour</td>
</tr>
<tr>
<td>Ad hoc after-hours support</td>
<td>Nomination fee: $300 per evening or non-business day. Call fee initial: $900 covering the first 2 hours, travel time included. Call fee subsequent: $300 per hour thereafter.</td>
</tr>
<tr>
<td>Contracted after-hours support (12 months)</td>
<td>Till 8.30pm local time: Plus 20% on annual maintenance contract. 24 hours support, 5 days per week: Plus 120% on annual maintenance contract. 24 hours support, 7 days a week: Plus 220% on annual maintenance contract.</td>
</tr>
<tr>
<td>Consulting services</td>
<td>Principal consultant: $2000 per professional day (average of 8 hours per day). Senior consultant: $1600 per professional day (average of 8 hours per day). Consultant: $1400 per professional day (average of 8 hours per day).</td>
</tr>
<tr>
<td>Customer training</td>
<td>$2200 per instructor day for customer specific course (maximum of 8 students and fee includes course materials). $450 per student per day, at Talent2 Works education centre public courses.</td>
</tr>
</tbody>
</table>
Appendix H

Pre production patch mechanism

All logical units of work, whether they are enhancements or bug fixes, are released as work orders in pre production patches, minor releases or major releases. Each individual work order is developed, tested and unit tested. They are then moved to a holding area called pre production where they await full system testing and beta testing prior to the production release.

At intervals, the work orders residing in pre production are zipped up and placed on the Talent2 Works FTP site as a pre production patch. Customers are notified by email and can then download the patches if desired.

Each pre production patch is built upon and also includes any previous pre production patches for the same Minor/Major release.

For example, if there were 5 work orders in pre production patch 1, and another 5 work orders in pre production patch 2, pre production patch 2 would have all 10 work orders.

The resulting Minor/Major release, contains all work orders scheduled for that release, regardless of whether they were included in a pre production patch.

The successful (or unsuccessful) installation of a work order is recorded in a table called csi_install_breakdown.

When a work order is installed successfully the install_date in the csi_install_breakdown table is updated.

If a customer installs pre production patch 1, and then subsequently installs pre production patch 2, the installation process will ignore any work orders that have a value in install_date, i.e. it will not try and re-install work orders that have already been installed.

Following on from this, if a customer hasn’t installed pre production patch 1, and then installs pre production patch 2, it will install all work orders as there will be no data in the csi_install_breakdown table from pre production patch 1 to ignore.

The same principle applies to the final production Minor/Major release.

If a work order fails to install, the install_date is not updated and the install process immediately stops. The process will not install a work order if the previous work order failed to install.

The reason for the work order failure is listed in the work order log file. If the problem can be fixed, the install process can be re-ran, the offending work order should then succeed, and all the following work orders should then install.

It is important to note that each work order is dependent on the previous work order, just in the same way that each release is dependent on the previous release. You cannot select specific work orders to install, you must install everything that is currently in the pre production zip file. For example, if there are currently 5 work orders in the pre production zip file, and you were really only interested in the fourth work order, when you install the pre production software, all work orders are installed, and all programs will require testing.

The pre production patch release mechanism was introduced to enable customers to access new program changes in a timely manner without having to wait for the next Minor/Major release which occurs every six months with the intention that the customer progresses to the following release when it becomes available. Pre production patches will have undergone unit testing, however they will not have undergone full system testing or Beta testing.
It is important for the customer to be aware that this Pre production software will not be supported as ‘official’ software, though where assistance is required and queries are directed to the Talent2 HRIS Response Centre, these will be investigated.