



Manufacturing Management Software

Training & Support Plan

Making IT Work

Save Time

Save Money

Improve Performance

Comprehenisve - Proven - Affordable

www.match-it.com



Table of Contents

Training & Support Plan	3
1 Training Manuals	3
2 Function Training	4
2.1 Standing data actions:	5
2.2 Normal business actions:	5
2.3 Failure/Reject/Change/Chase actions:	5
2.4 Business status actions:	6
3 Method Construction Training	7
4 Document Designer Training	8
5 Implementation Consultancy	9
6 Non-Specific Customisations	10
7 User Training	11
8 Advanced Training	12
9 User Support	13
10 Software Upgrades	14
11 Extended Support	15
12 Support Scheme	16
13 Support Charter	16
14 Upgrade Policy	16

Training & Support Plan

This document describes the scope of the training, support and customisation services that can be provided for your Match-IT system.

The comprehensive nature of the Match-IT software, and the all-pervasive impact it can have on your business often leads to confusion over the meaning and scope of the training, consultancy, customising and support activities. The purpose of this document is to remove this confusion by defining the meaning and scope of the services provided.

Training covers learning how to use the software and also extra consultancy services that can be provided to help you develop new working practices and procedures.

Support covers day-to-day usage assistance provided via email, a support website and a telephone help line.

Customisation covers extending the software in various ways that are specific to your installation; for example, scripts to automate some process and document layouts.

Training is usually provided during your implementation project, and support is usually provided for at least your first year of use. The time allowances for the services being provided will have been stated in your *Proposal*.

Refer to the *Implementation Manual* for a description of how these services fit into your overall implementation project.

This document is not a training manual. The purpose of this document is to specify the services that can be provided so that you know what you are getting. It also defines the limits of those services. Your proposal will explicitly identify any services you requested that falls outside the specification given in this document.

1 Training Manuals

The Match-IT system includes a set of generic manuals that describe the basic usage of the system. These manuals are all available on-line, either as Adobe PDF documents or as Windows™ help files. They are generic in that they describe Match-IT in its standard form and for no particular context.

A typical Match-IT installation may be tailored to your specific requirements. You are expected to write your own manuals that describe how to use Match-IT within your context.

To view the available manuals, log-in to Match-IT and select the *Help* item in the menu bar.

2 Function Training

Definition:	The training given to your trial team during your implementation project.
Purpose:	To give your trial team knowledge of the Match-IT system and its capabilities <u>in its standard form</u> . This knowledge covers all the activities necessary to run your manufacturing operation through Match-IT.
Venue:	The venue for this training will usually be specified in your proposal. Where you are choosing the venue, you should bear in mind that its best done away from your normal work environment. This is to minimise interruptions from work colleagues. Such interruptions can seriously hamper your progress. The training will be given in <i>sessions</i> in units of days (nominally 10 AM to 4 PM).
Prerequisites:	You must be familiar with working in the Windows™ desktop environment. You must know how to log-in, log-out and navigate within Match-IT (as described in the <i>User Guide</i>). This training is usually performed <u>before</u> your customisations have been implemented and <u>before</u> your legacy-data has been transferred.
Limits:	Function training does not include system administration or system configuration activities. These topics are covered within <i>advanced training</i> . Your proposal will specify the number of days provided for your <i>function training</i> . This allowance, under normal circumstances, will be adequate to cover all the topics relevant to you, provided you stay focused on the purpose of this <i>function training</i> . <u>There will be extra fees charged if you significantly overrun the allowance made in your proposal.</u> The people attending the training sessions are expected to devote their undivided attention to them.
Method:	This training is usually started from a completely empty system. Everything needed (customers, suppliers, products, etc.) is created as you go. The specific syllabus will be tailored to your requirement. Typically, training starts off very general and becomes more specific as you learn more. The <i>Training Workbook</i> covers a general syllabus. You must call-off the sessions when you are ready for them. The session dates will be as mutually agreed. Please note, we cannot guarantee dates will be available at short notice, so you should book your sessions well in advance.
Coverage:	The main topics you should cover are listed below (in no particular order).

2.1 Standing data actions:

1. Add a new customer and contact
2. Add a new supplier and contact
3. Add a new raw material and its supplier
4. Add a new resource
5. Add a new product and its customer
6. Add a new method to a product

2.2 Normal business actions:

1. Take an enquiry
2. Convert the enquiry to a quote
3. Convert the quote to an order
4. Take a sales order
5. Approve a sales order
6. Create a tender to a supplier
7. Receive a response to a supplier tender
8. Update supplier prices from a tender response
9. Raise a scheduled purchase order
10. Raise an ad-hoc purchase order
11. Approve a purchase order
12. Accept a delivery from a supplier
13. Book-in purchased goods to stock
14. Accept an invoice from a supplier
15. Approve a supplier invoice
16. Approve a scheduled works order
17. Log progress against a works order step
18. Log output from a works order
19. Book-in excess kit returns from a works order
20. Sign-off a works order
21. Raise a scheduled sub-contract purchase order
22. Accept excess kit returns from a sub-contractor
23. Raise a scheduled sales dispatch
24. Approve a sales dispatch
25. Raise a scheduled sales invoice
26. Raise an ad-hoc sales invoice and credit note
27. Approve a sales invoice
28. Transfer invoices and new accounts to your accounting system

2.3 Failure/Reject/Change/Chase actions:

1. Cancel a sales order
2. Change a sales order delivery date and quantity and re-schedule
3. Re-prioritise the sales orders for a customer and re-schedule
4. Cancel a purchase order
5. Change a purchase order delivery date and re-schedule affected sales
6. Change a sub-contract purchase quantity and re-schedule
7. Reject a supplier delivery
8. Accept a credit note from a supplier
9. Cancel a works order
10. Merge works orders for the same material and re-schedule
11. Change the quantity of a works order and re-schedule
12. Modify the kit issued to a works order
13. Modify the resources allocated to a works order
14. Inspect and fail a stock batch
15. Inspect and fail a works order process step
16. Inspect and fail a works order output

17. Shut-down a resource and re-schedule active works orders
18. Accept a reject/return from a customer
19. Raise a credit note to a customer
20. Trace the status of a sales order
21. Perform a stock-take

2.4 Business status actions:

1. Run the performance analysis report
2. Run the enquiry summary report
3. Run the sales summary report
4. Run the purchases summary report
5. Run the stock summary report
6. Run the reject summary report
7. Run the works order hours summary report
8. Run the cost analysis report

3 Method Construction Training

Definition:	The training given in understanding and using the facilities of the <i>Method Editor</i> .
Purpose:	To enable you to construct production methods that best model your processes.
Venue:	The venue for this training will usually be specified in your proposal. Where you are choosing the venue, you should bear in mind that its best done away from your normal work environment. This is to minimise interruptions from work colleagues. Such interruptions can seriously hamper your progress. The training will be given in <i>sessions</i> in units of days (nominally 10 AM to 4 PM).
Prerequisites:	You must have completed the <i>function training</i> .
Limits:	Your proposal will specify the number of days provided for your <i>method construction training</i> . <u>There will be extra fees charged if you significantly overrun the allowance made in your proposal.</u>
Method:	There is no overall structure to this training. Each topic is largely independent of any other. You must call-off the sessions when you are ready for them. The session dates will be as mutually agreed. Please note, we cannot guarantee dates will be available at short notice, so you should book your sessions well in advance.
Coverage:	The topics that can be covered are listed below. They are listed in no particular order. <ol style="list-style-type: none"> 1. Understanding dimensions and containers 2. Understanding resources 3. Understanding processes 4. Understanding steps 5. Understanding assemblies 6. The impact of returns (off-cuts, bar-ends, partial reels, etc) 7. Nesting (multiple outputs) 8. Work sharing

4 Document Designer Training

Definition:	The training given in using the integrated document designer (<i>List & Label</i>).
Purpose:	To enable you to design new paperwork or modify the standard ones.
Venue:	The venue for this training will usually be specified in your proposal. Where you are choosing the venue, you should bear in mind that its best done away from your normal work environment. This is to minimise interruptions from work colleagues. Such interruptions can seriously hamper your progress. The training will be given in <i>sessions</i> in units of days (nominally 10 AM to 4 PM).
Prerequisites:	You must have completed the <i>function training</i> .
Limits:	Your proposal will specify the number of days provided for your <i>document designer training</i> . <u>There will be extra fees charged if you significantly overrun the allowance made in your proposal.</u>
Method:	There is no overall structure to this training. Each topic is largely independent of any other. You must call-off the sessions when you are ready for them. The session dates will be as mutually agreed. Please note, we cannot guarantee dates will be available at short notice, so you should book your sessions well in advance.
Coverage:	The topics that can be covered are listed below. They are listed in no particular order. <ol style="list-style-type: none"> 1. Modifying an existing paper 2. Creating a new paper 3. List based documents 4. Form based documents 5. Labels and bar-codes

5 Implementation Consultancy

Definition:	The consultancy given to your trial team to assist them in developing revised business practices to make the best use of the Match-IT system.
Purpose:	The Match-IT system often provides multiple methods to perform any particular task; the purpose of this consultation service is to allow you to determine which method is best for you.
Venue:	The consultation sessions will usually be conducted on your site. The sessions are provided in units of days (nominally 10 AM to 4 PM).
Prerequisites:	You must have completed the <i>function training</i> .
Limits:	Your proposal will specify the number of days provided for your <i>implementation consultancy</i> . <u>There will be extra fees charged if you significantly overrun the allowance made in your proposal.</u>
Method:	This is an interactive exercise between you and your Match-IT implementation engineer. You are expected to make note of the topics you wish to explore during your <i>function training</i> and then raise them during your consultation sessions. You must call-off the sessions when you are ready for them. The session dates will be as mutually agreed. Please note, we cannot guarantee dates will be available at short notice, so you should book your sessions well in advance.
Coverage:	There is no specific coverage. It is up to you within the time allocated.

6 Non-Specific Customisations

Definition:	<ol style="list-style-type: none"> 1. Making minor alterations to the Match-IT system to allow you to perform actions that you currently cannot. 2. Making cosmetic changes to your customised document layouts, your customised wizards, or other specific customisations if you have any.
Purpose:	To provide extra facilities required by your operation.
Prerequisites:	You must have completed you implementation project trials.
Limits:	<p>This support is provided for your first year as part of your implementation project. Your proposal will specify the number of days provided for your <i>non-specific customisations</i>. <u>There will be extra fees charged if you significantly overrun the allowance made in your proposal.</u></p> <p>The interpretation of what is considered <u>minor</u> or <u>cosmetic</u> is the sole prerogative of Match-IT Limited. Any request not judged to be minor or cosmetic will be treated as <i>extended support</i> and will result in a quotation being issued. In this case, no work will be done until you agree to the terms of the quotation. Intellectual property rights in any work performed are exclusively owned by Match-IT Limited.</p>
Method:	Send an email to support@match-it.com describing your request.
Coverage:	Any aspect of the Match-IT software.

7 User Training

Definition:	The training given to the people that are going to use Match-IT to perform their work.
Purpose:	To provide your staff with the relevant knowledge to allow them to perform their duties using the Match-IT system.
Venue:	The training will usually be given on your site using your equipment. The training will be given in <i>sessions</i> in units of days (nominally 10 AM to 4 PM).
Prerequisites:	This training is given when you are ready to 'go-live'. Members of your trial team usually perform user training so they must have completed their function training.
Limits:	Your proposal will specify the number of days provided, if any, for your <i>user training</i> . <u>There will be extra fees charged if you significantly overrun the allowance made in your proposal.</u> The people attending the training sessions are expected to devote their undivided attention to them.
Method:	The specific method and syllabus will be tailored to your requirement. The overall syllabus should be split at appropriate places to reflect the roles of your users. Each person should attend the sessions that are relevant to his or her role. Your system administrator is expected to be involved to provide your company procedure knowledge when needed.
Coverage:	The coverage is the same as the <i>function training</i> .

8 Advanced Training

Definition:	The training given on system administration and configuration functions.
Purpose:	To provide your system administrator with the knowledge needed to make configuration changes and to understand how to 'manage' the system.
Venue:	The training will usually be given on your site using your equipment.
Prerequisites:	You must be familiar with working in the Windows™ desktop environment. You must know how to log-in, log-out and navigate within Match-IT (as described in the <i>User Guide</i>).
Limits:	Your proposal will specify the number of days provided, if any, for your <i>advanced training</i> . <u>There will be extra fees charged if you significantly overrun the allowance made in your proposal.</u>
Method:	There is no overall structure to this training. Each topic is largely independent of any other. You must call-off the sessions when you are ready for them. The session dates will be as mutually agreed. Please note, we cannot guarantee dates will be available at short notice, so you should book your sessions well in advance.
Coverage:	A non-exhaustive list of topics that can be covered are listed below: <ol style="list-style-type: none"> 1. Security schemes 2. Menu systems 3. Wizard scripts 4. Import/export scripts 5. Quality review check lists 6. Coding schemes 7. File maintenance and recovery 8. Notes and messages 9. Report layouts and papers 10. Print queues 11. Qualifiers 12. Units of measure 13. Defaults 14. File registry 15. DDE 16. Printing browses as CSV files or HTML pages 17. Upgrades and patches 18. Time synchronisation

9 User Support

Definition:	Providing telephone, email and web-based responses to operational questions and issues that arise during Match-IT operation.
Purpose:	To answer questions and provide guidance on the use of Match-IT in specific circumstances.
Prerequisites:	<u>You must have completed the appropriate training and must be participating in the support scheme.</u> Support will be refused if you are not currently in the support scheme.
Limits:	This support is usually provided for at least your first year as part of your implementation project. Your <i>Proposal</i> (or subsequent support agreement) will define the upper limit, in terms of time, that will be provided. <u>Support beyond this limit will incur additional charges.</u>
Method:	For urgent issues, telephone your Match-IT support engineer on 0845 1300 410. Please only do this for truly urgent issues. An urgent issue is something that is stopping you doing something that you must do now. If it can wait until tomorrow, it is not urgent. When you call your support engineer, please ensure caller-ID is enabled on your phone system. Calls with a withheld ID are likely to be ignored. For non-urgent issues, send an email to support@match-it.com describing the assistance you require. All support requests are logged, no matter how they are received, and given a unique reference number. There will be an area on the Match-IT website where you can log-in and view your support requests and their status. The primary communication mechanism is by email.
Coverage:	Any aspect of the Match-IT software and its operation within your environment.

10 Software Upgrades

Definition:	Providing access to updated and new releases of the Match-IT software.
Purpose:	To keep the Match-IT software relevant to your business.
Prerequisites:	You must be participating in the support scheme to be able to install and run newer versions of the Match-IT software.
Limits:	All software upgrades and new releases are usually provided for at least your first year as part of your implementation project. Thereafter it's only available if you participate in the support scheme.
Method:	Send an email to support@match-it.com requesting a new CD or go to our website at match-it.com and download the latest version.
Coverage:	The Match-IT software.

11 Extended Support

Definition:	Making alterations to the Match-IT system that are beyond the scope of the normal software upgrades. This includes designing, or re-designing, customised document layouts and customised wizards.
Purpose:	To keep the Match-IT software relevant to your business.
Prerequisites:	You must be participating in the support scheme.
Limits:	Intellectual property rights in any work performed will be exclusively owned by Match-IT Limited unless otherwise stated in your quotation.
Method:	This level of support is chargeable on a per item basis. Match-IT Limited will present a quotation for such work against a requirement specified by you. In the first instance, send an email to support@match-it.com describing your request.
Coverage:	Any aspect of the Match-IT software.

12 Support Scheme

To receive the support services described in this document you must be participating in the support scheme. All systems include membership of the support scheme for at least your first year of using Match-IT. Thereafter it is optional.

You join the scheme, or continue in it, by paying the support fee. The support fee will be influenced by your actual support usage for the previous year. The date the fee becomes due is based on your original system installation date. The scheme includes limited telephone and email support, unlimited take-on of new software releases and minor system alterations to streamline the operation of Match-IT within your organisation. The coverage includes the *User Support*, *Non-Specific Customisations* and *Software Upgrades* services described in this document.

IMPORTANT:

By joining the support scheme you receive both support and access to new software releases. You cannot have one without the other. If you decide not to renew your support scheme when it becomes due, we will refuse your telephone support requests. You may continue to email support requests to support@match-it.com but they will take lower priority than those received from customers on support. Also, be aware that the response to an emailed request may require you to install the latest version of Match-IT. If you are not on support, you will not be able to do that.

13 Support Charter

The following is the Match-IT Limited support charter. This represents the commitment that Match-IT Limited makes to you to support your system.

We will undertake:

- To provide timely and competent technical expertise relevant to your system.
- To use our best endeavours to provide problem fixes within the same working day as they are reported to us.
- To advise as soon as possible if the problem is outside the scope of any Match-IT Limited supplied software or hardware and that we are not qualified to deal with it. In such cases, we will advise you of a suitably qualified source of expertise.

In addition, we will undertake:

- To make minor alterations to streamline the operation of Match-IT within your organisation.
- **To regularly ask you for your opinion on system improvements and to incorporate as many as possible into new Match-IT releases.**
- To advise you as soon as possible that your improvement suggestions are being implemented.
- To automatically advise you when new releases become available and offer additional training for the new releases.
- **To keep your system up to date and relevant to your business for as long as you are in the support scheme.**

14 Upgrade Policy

The Match-IT system has been designed from the outset to evolve and incorporate new ideas and technologies as they become available. The pace of change is such that there may be many new releases each year. Each new release will enhance existing features and add new features. Take-on of these new releases is optional. When you take on a new release, the Match-IT system will transfer all your data from the old release to the new and make any necessary adjustments. This transfer is automatic and is performed the first time you log into the new release.

The recommended route to take advantage of these new releases is to join the **support scheme**. Members of this scheme can receive all new releases as soon as they are available. As a member, you can be actively involved in defining the features of the new releases.

You can join and leave the support scheme at any time. However, if you join 'late', or re-join after leaving, you must bring yourself up to date by taking on any intervening releases you missed. This is necessary because each new release will build on the features of the previous release.

New releases are published on a regular basis on the Match-IT web-site at www.match-it.com. You are free to download these releases at any time, but you will not be able to run them against your existing data unless you are a member of the support scheme. However, you can run them as a fresh install for a limited period for evaluation purposes.