

Electronic-Type



Database Design Process

The Process of Designing a Successful Database using:

FileMaker Pro 13



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Customer Information on FileMaker Pro 13 Development Stages

General

This information package has been put together both as a brief explanation as to how **Electronic-Type** prepares and develops a database solution – but also to outline the expectations we have of you, the prospective customer. You need to not only have confidence in us, but understand that we need to have confidence in you. Mutual trust is paramount.

After the initial consultation (see below for details) you will have confidence in our ability to create a database solution that is both visually pleasing as well as being able to manipulate and manage your data in exactly the manner you require. What we require from you is your ability to precisely explain your company and its business operations. We then need to know what is required from the prospective database... what you want it to achieve. Is the database a simple data tracking device, or, possibly a management tool, which will be used to define your business direction in the coming months and years. When creating a solution, database development has three distinct phases:

1. The Initial Consultation

The initial consultation is, with the exception of unusual circumstances, free. It's for us to meet, greet and discuss: What is your business? What are you attempting to resolve using FileMaker Pro? We explain what the development process is, and give a demonstration of one (or more) of our databases. At this time, we would want to know if you have budgeted for a database. Both in terms of time needed to prepare the necessary information and access to the appropriate people for development – as well as financially.

This stage usually takes an hour or two, but can sometimes last 10 hours or more if follow on meeting and/or discussions are required. At the end of these meetings we will have an overall idea of what we require from you and what your database expectations are. At this time we provide you with a one page **Needs Analysis** - which is our understanding of the project, and a *very approximate cost*, description of the database and time indication associated with development.

2. Specification

The next stage is the Specification (Spec) stage. If you decide to move forward, this is where we provide you with our understanding of all the comprehensive details of what the project requirements are. Thought needs to be given as to the business plan and how data is to be manipulated. We will want to talk to the users: data entry staff, sales staff, supervisors - not just upper management - to understand the overall data processing requirements.

Consider the analogy of building a house. What do you have for specs? Maybe the basic floor plan, maybe other details, certainly a lot of ideas:

Is the trim pine or oak?

Are appliances included?

Is the basement finished?
What about plumbing for a jacuzzi?
What level of insulation do you require...and how about air conditioning?
...and more.

As you can see, there is a lot to building a house, and while a database is certainly much simpler to develop - it still requires considerable thought as to what information and resources are required both to develop the database and to effectively manipulate the data.

This information learned during our initial meeting determines the design. Such things as, whether you use PC's, Mac's... or both. Do you have, or, will your future needs require the use of a FileMaker Pro Server - if so, PC or Mac and what Operating System ? We will know how many users will use the system, screen sizes for all machines. Are you using Mac OSX 10.6, 10.7, 10.8, 10.9 or Win 7, XP or Vista (check with FileMaker for specification requirements and or changes).

Do you need remote log-in capability (VPN), or, a web site capability. What about a networked fax machine, or, if email capability is required, an e-mail router? Will you require different levels of manager/user accessibility (password protection) - how many levels? Do you need to know who last edited or changed file information and when? This stage will involve meeting with our staff and you or your project manager(s), as well as IS / IT staff and a representative set of users.

There are a great many things to think about – and they are all critical to good development. The Spec phase is billable time, and at the rate of \$115 per hour. This stage is extremely important as it allows us to understand the projects feasibility, discuss all aspects of your 'must have needs' as opposed to the 'might be nice to have' features. Most of the 'thought work' of the project gets done at this stage – and is crucial as it allows the system design to crystallize in our heads. The general specification is agreed upon, decisions such as whether written documentation and/or on-line help is required are made, and so on. We will also comment on suggested software upgrades, minimum hardware and computer equipment specs in general, (as pertaining to the database requirements).

There is inestimable value in good design and analysis, and it saves a great deal of time and money if the project is designed thoroughly, well, and at the earliest stages. The Spec time can range from a day for simple projects to weeks for the truly large developments. It may account for perhaps as much as half of the total development cost and time. Upon the Spec completion, we write and present to you a cost estimate and time estimate. This will outline both the job as well as more detailed information such as screen layouts, fields, files and the programming involved. We also present our invoice for the Spec at this time.

The estimate will include program and development timings, cost schedules and confirmation of all the development requirements needed to complete the project, such as

hardware/software requirements (if) needed to provide an adequate platform on which the solution will run.

All estimates are based on the understanding that, unless otherwise indicated in writing, you have (or will have) all necessary infrastructure, network capability, software and hardware to run the solution as developed.

If you choose to move forward with the project, you have the blueprint, if not, you can merely pay the Specification invoice. You will at the very least have a thorough and comprehensive understanding of your potential database system, its strengths and weaknesses, and, from a consulting organization that specialize in FileMaker Pro design.

Note: Because we do not know before to the Spec stage what is required from your prospective database, we cannot accurately advise you of the Spec cost prior to its completion. Also, any changes, and especially additions, requested *after* we have submitted the specification, may *and probably will*, result in cost additions and overruns. - It cannot be overstated that we must have all database information and criteria prior to initiating the programming phase.

3. Programming Stage

Assuming we have an agreement to proceed, the Programming Stage commences with billing rates at \$115 per hour. There will doubtless be further discussions during this phase, which should be at user to manager level. We provide, at various stages, working examples of the project for you to track and comment upon.

Please note

- While it is possible to incorporate alterations to the design at any stage, once the design has been established (during the Spec stage), it becomes more difficult to institute those changes. If such changes affect the core aspects of the solution. We cannot stress enough the need to keep to the plan. Not doing so can lead to significant cost overruns. Also,
- In the event that we do not have access to information or personnel, which results in programming delays, we reserve the right to charge waiting time at a rate of \$50.00 per hour until such access is possible. Delays may (and probably will) adversely affect the completion date.

Depending on the complexity of the project, we may need to run a mock up of the solution using your operational data either on our computers, or, on your systems (though this is discouraged as it costs more and is not cost effective to you, or to us). Changes are made as required.

On completion of the programming phase, the final database installation is undertaken, the latest working data entered (if previously agreed) and checked. At this stage staff training may be undertaken, (if previously agreed) - on the solution provided - general FileMaker Pro training is an additional cost unless agreed to) and the database is then

handed over. Final billing is made at this time. We then provide a six months free support and bug fixing from the time of installation.

4. Payment schedules are as follows:

All new development requires a 40% of the development fee as down payment. Work in progress will be invoiced on a weekly or bi-weekly basis.

N.B. We invoice on time actually spent on the development of a project, not anticipated time based on our estimates.

5. Confidentiality

Electronic-Type recognizes and acknowledges that the services performed for the Client are confidential, and, to enable Electronic-Type to perform these services, the Client must/ may furnish to Electronic-Type confidential information concerning their business affairs, finances, properties, methods of operation and other data as required. Electronic-Type recognizes the importance of its' keeping all such services and information confidential and that unauthorized disclosure of the same may cause damage to the Client. Additionally, Electronic-Type may receive information concerning the services performed by the Client for its clients, or, information furnished by its clients to the Client. Any and all such information is hereinafter collectively referred to as 'Confidential Information' and will be treated as such by Electronic-Type. Should the Client require us to delete all such information on completion of the solution, please advise us in writing.

6. Miscellaneous Development

We are able to provide support at any time during normal business hours, in the event that you require technical assistance, help or advice. Weekend or out of normal working hours support is charged at double the normal rate.

The database rights are retained by Electronic-Type until final payment is received, and ownership of the database, while passing to the you the client on completion, does not confer on the client or any other persons or organization the right to either sell, rent or disseminate the database to any other organizations, or, individuals unless expressly agreed to in writing by Electronic-Type.

On completion of development it is your right to receive the master (developer) password. **However**, we suggest that Electronic-Type retain the master password until the end of the six months warranty / bug fix period.

This is in your best interests.

In the event that you receive the master password, any programming or other issues which occur after installation are considered to be of your making and we will charge to rectify such issue. If Electronic-Type retains the master password, we are responsible for any programming and design issues which occur – but not including user data loss, data contamination or physical damage.

As the customer, you are expected, (and required) to have a full understanding and knowledge of FileMaker Pro and FileMaker Pro Server issues which may affect the safe keeping and integrity of your data. We can provide a 'Best Practices' white paper if required.

Note. That data mapping/conversion as well as staff training are normally charged as an additional item over and above development costs – unless specifically included in the cost estimate.

Hopefully these few pages will have explained in general terms the process of designing, developing and installing a database - and the ramifications inherent in the process. If you have any queries about this process, or want to discuss your specific needs, please call or email:

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