

# Electronic-Type



## Database Design Process

The Process of Designing a  
Successful Database using:

FileMaker Pro 8.0, 8.5 & 9.0



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## Customer Information on FileMaker Pro 8.0, 8.5 & 9.0 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) 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 is required from you and what your database expectations are. At this time we provide you with an indication of our understanding of the project, and a very approximate cost and time indication associated with development.

#### **2. Design and Analysis**

The next stage is the Design and Analysis (D&A) stage. If you decide to move forward, this is where we discuss all the fine details of what the project's needs are:

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?

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

This information determines the design. We will need to know 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 need to know how many users will use the system, screen sizes for all machines. Are you using MacOSX or Win 2003, XP or Vista.

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 representative users.

There are a great many things to think about – and they are all critical to good development. The D&A phase is billable time, and at the rate of \$85 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 an early stage. The D&A time can range from a day for simple projects to weeks, or, months for the truly large ones. It may account for perhaps as much as half of the total development cost and time. Upon the D&A completion, we write and present a proposal and quotation. 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 D&A at this time.

The quotation 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.

Note: all quotations are based on the understanding that, unless otherwise indicated, you have all necessary infrastructure, network capability, software and hardware to run the solution as described.

If you choose to move forward with the project, you have the blueprint, if not, you can merely pay the D&A invoice. You will at the very least have a thorough and comprehensive breakdown 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 D&A stage what is required from your prospective database, we cannot accurately advise you of the D&A 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 next phase.

### **3. Programming Stage**

Assuming we have an agreement to proceed, the Programming Stage commences with billing rates at \$85.00 per hour. There will doubtless be further discussions during this phase, which should be at manager and user 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 D&A 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 \$40.00 per hour until such access is possible. Delays may 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 and checked. At this stage staff training may be undertaken, if 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.

#### **4. Payment schedules are as follows:**

All jobs – irrespective of value: 40% of the development fee as down payment. Work in progress will be invoiced on a weekly basis.

N.B.

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

#### **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.

#### **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.

The database rights are retained by Electronic-Type until final payment is received, and ownership of the database, while passing to 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.

This is in your best interests.

In the event that you receive the master password, any programming or other issues which occur after receipt 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 – not including user data loss or contamination.

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.

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 quotation.

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

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