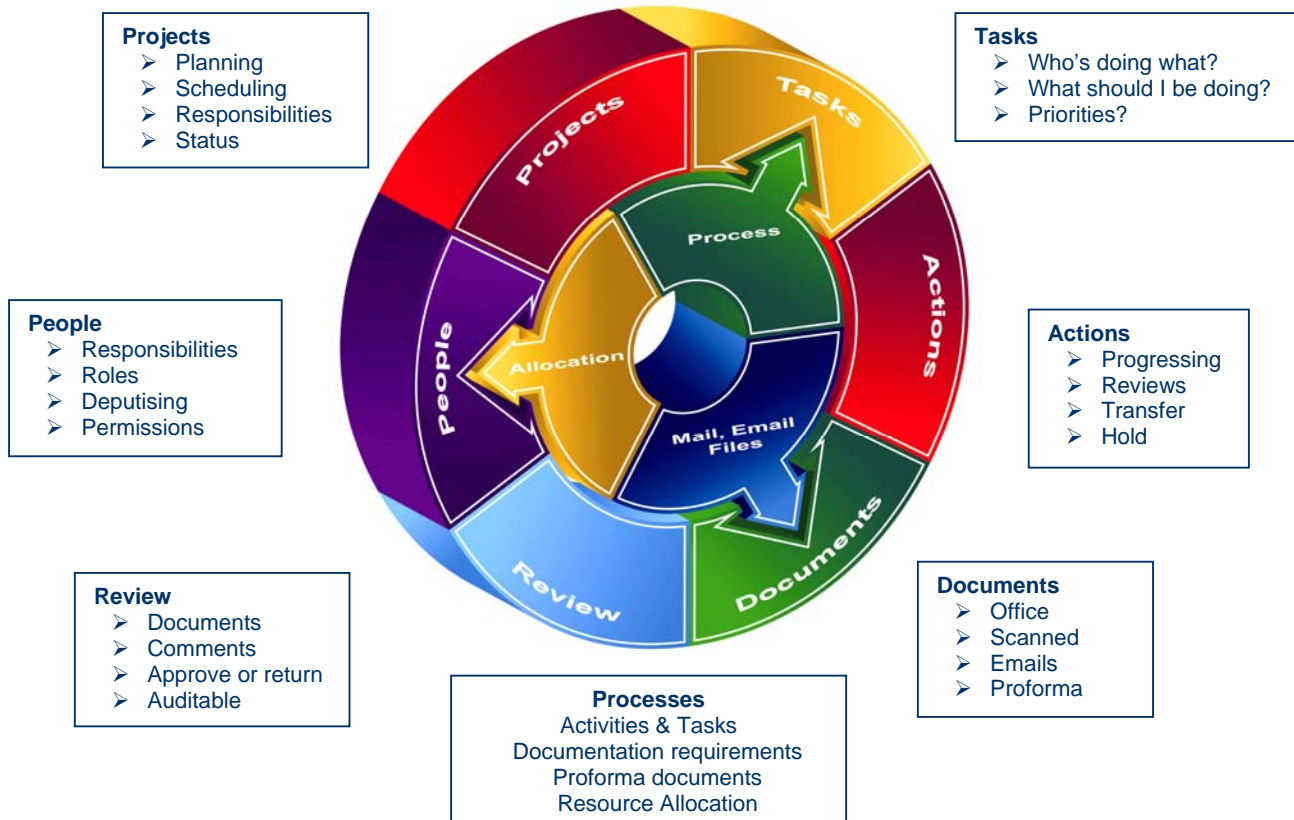


# Kiwi Workstream

The inexpensive and effective solution for the control of processes and documentation.

Relevant to all small to medium business sectors.

Aids conformance to quality standards and adoption of BS9001:2008.



Enhance business efficiency.

Rapid take-up and return on investment.

Easy to use for all levels of staff.

*“An inexpensive software solution ensuring a consistent, manageable and cost-effective approach to documentation and process compliance resulting in improved productivity and customer satisfaction allowing businesses to focus on their core business drivers.”*

## What is Workstreaming ....

We recognise the need of many small to medium businesses to better manage streams of work and associated documents through their organisations.

We use the term "workstreaming" to differentiate our solution from, on the one hand simplistic bulk paper scanning solutions to overweight, over-featured and costly workflow and business process management solutions.

Our *Kiwi Workstream* system provides the means to plan and monitor work as it progresses and bring together disparate documents in a secure, consistent and structured way. As part of a quality management system, *Kiwi Workstream* enables auditable conformance to process and documentation standards.

Flexible yet easy to create templates are used to mirror your business processes and associated activities, documentation and review requirements. Once created they can be used over and over again, and are simple to amend following process reviews. A library of standard process templates is provided as a starting point for your own process definitions.

Using these process templates, interrelated tasks are planned and scheduled in a consistent way and progress is monitored using simple 'traffic light' colours to show status.

Documents are filed against relevant tasks as it progresses and completion of a task is dependent upon fulfilment of the documentation and review requirements of the task.

The *Kiwi document registry* brings together electronic documents of any type including internal office documents, scanned paper documents and emails.

## Why use Kiwi Workstream ...

Adoption of *Kiwi Workstream* could provide you with many benefits, including:-

- supporting conformance to BS9001:2008
- keeping track of work in progress
- always knowing where documents and files are
- being reminded when something needs doing
- document version control
- more than one person can access any document
- customer retention through effective relationship management
- attracting new customers with a 'well-organised' office
- space saving – get rid of those bulky dusty old files
- very rapid access to all jobs and associated documents
- less vulnerability to staffing changes
- 'private areas' for controlled documents such as HR records

A decision to use *Kiwi Workstream* is likely to be based on the overall flexibility and effectiveness together with well managed costs and delivery. Our professionalism, approachability, lack of jargon, management of costs, reactivity and commitment to quality support might also attract you.

## What next ....

Contact us now for an introductory chat with a no commitment and no pester guarantee, or to attend one of our short locally based seminars:-

Online contact form: [www.altraxis.co.uk](http://www.altraxis.co.uk)

Email: [info@altraxis.co.uk](mailto:info@altraxis.co.uk)

Telephone: Nigel or Kim on 01305 755669

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Prospect House, Peverell Avenue East,  
Poundbury, Dorchester, Dorset DT1 3WE

Company Number: 2754566

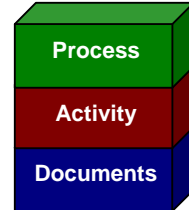
## In more depth ...

### Process templates

Central to *Kiwi* are process templates; these identify the processes and associated activities commonly undertaken within your organisation, and any interdependencies between the activities.

Against each activity, you document the process requirements, making it clear to staff what is required at each stage, including the documents required and whether the activity requires management review for completion. Proforma documents are defined as part of the process templates providing for a consistent approach to document production.

Once defined, the process templates will become a key component of your quality system manual.



A starter library of templates is provided with *Kiwi* which are easily extended using *Kiwi* to suit your organisation.

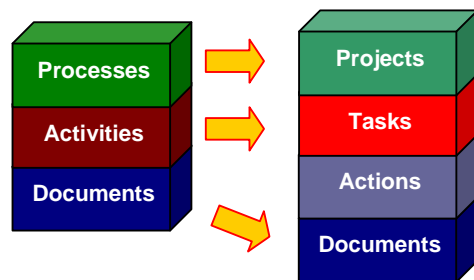
With the flexibility of process template design, you do not need spend long at the outset defining your processes but can continue to develop them alongside using the system as part of your quality review processes.

### Projects

*Projects* are created from process templates; you would create a project in response to, for example, a request for a quotation or to cover hiring of a new member of staff.

When a project is created, an appropriate series of tasks is generated along with planned start and finish dates. At this time individual staff members would be allocated against each task and the relevant manager identified if a review is required.

Planning features provide for subsequent review of requirements and re-scheduling of projects.



*Kiwi Workstream* supports two core data models.

The client oriented model is used where you have a continuing relationship with your clients and would often undertake more than one *project* for a client, possibly concurrently. For example, in an audit / accountancy practice the *project* may represent an annual audit.

The project oriented model replaces the client element with contacts and is used where projects are 'one-offs' such as construction or manufacturing projects.

### Tasks

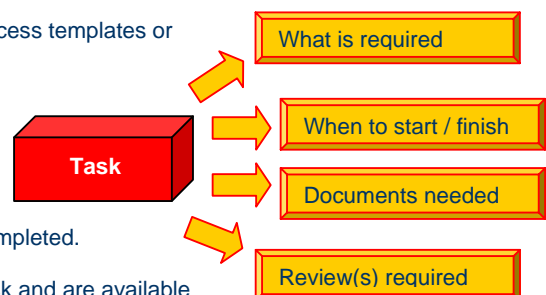
Tasks are created, as above, reflecting the activities defined within process templates or may be created on an ad hoc basis.

Tasks identify what is required, who is to do it, when it is to be done and whether management reviews are required.

As work progresses on a task, the responsible staff member records progress and registers documents. If a review is required, the task must be reviewed by the appropriate person before the task can be completed.

All actions and any associated documents are recorded against the task and are available for quality audits.

Tasks may be easily moved from one person to another if a reallocation of workload is required.



## Management reviews

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Where a task has been marked as requiring review the person responsible for the task passes it for review to the appropriate person, clearly identifying the key documents. The task cannot be completed without satisfactory completion of the review process. The review process is automatically recorded on the system providing for subsequent audit. Two levels of review are supported.

## Work to lists

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At all times every member of staff and management has a clear and concise view of their outstanding tasks both those tasks that they are directly responsible for fulfilling and those tasks that they are managing or reviewing.



## Project and task status

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Clear and concise summaries of project and task status are available, using simple green, amber and red indicators to aid prioritising.

## Tracking and alerting

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As tasks are passed between staff the receiving individual is alerted of the new responsibility. At all times any specific task will always be within a single individual's area of responsibility, preventing tasks and associated documents from "falling through the cracks".



Alerts are provided to identify situations requiring action, such as a management review being required, or to remind of an earlier flagged task requiring action.

## Document registry

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The document registry supports any document type, be they working documents, such as Microsoft Word™ or Excel™ documents, or emails and scanned documents originating from received mail. When documents within the registry are updated earlier versions of the document are preserved and marked as superseded to ensure continued integrity.



Documents are filed against specific tasks, or as general documents within a client or project file, working on the old adage of "a place for everything and everything in its place".

## Proforma documents

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When defining process templates, the document requirements can include the introduction of proforma documents, such as standard format letters, quotations, check lists etc.



These are available to staff as they progress specific tasks, ensuring that the latest and correct version of standard documents are used.

## emails

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External documents sent by emails are automatically received and registered without any manual intervention.

## Scanning

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Received paper mail or other paper documents may be scanned and registered with the document registry alongside internal documents and received emails.



## Staff functions

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Full account is taken of the need for effective staff functions, such as deputising for absences, staff leaving or transferring responsibilities.



## Privacy

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Access to particular client records or projects can be restricted to different groups of users; for example, HR records generally would be restricted to management and staff responsible for HR. A number of different groups may be defined to restrict access in different ways.

## Server based

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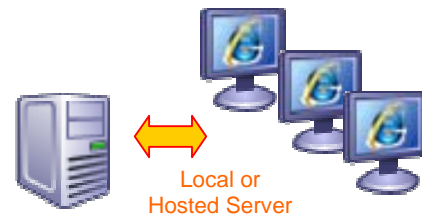
The *Kiwi workstream* system is built using the latest advanced technologies, providing for

- local installation on your own network server
- hosting on one of our internet servers

There are no PC installations required, all access being provided through Microsoft Internet Explorer™

Installation is quick and easy, generally handled by your own IT staff or we can visit to do this.

Wherever hosted, the system can be seamlessly accessed from anywhere using secure internet access.



## BS9001:2008

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*Kiwi Workstream* can play a pivotal role in attaining BS9001:2008 accreditation and in helping you maintain conformance to the standards.



We also believe *Kiwi Workstream* can be used to significantly drive down the cost of accreditation and conformance.

Our process templates map directly on to your business processes as envisaged in the standard, with linked activities and associated documentation requirements. The quality review process can be established as one of your standard operating processes within Kiwi to evidence and document your process reviews.

The Kiwi process templates can be used across all of your business operations, including management for HR processes for example.

## Training and support

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Full training is provided, either on site or on one of our regular public courses; the courses are brief half day sessions reflecting the ease of use of *Kiwi Workstream*. There are two courses:-

- a) Structure and process definition – aimed at the people who will administer the system
- b) Day-to-day use – for all levels of staff

The second course would usually take place a week or two after the first, allowing the basic setup of your own processes prior to going live company-wide.

We can also provide training materials to allow your system administrator to provide your own internal training after their course.

Effective online, email and telephone support systems are on hand for peace of mind. We are committed to providing the highest quality of support for our product.

## Installation and technologies ...

*Kiwi Workstream* can either be installed on your own server, typically Microsoft Small Business Server™ or other Microsoft Windows™ based file servers, or we can host this as a service on one of our own servers.

Installation is from a supplied CD and would usually be performed by your own IT support personnel although we can provide an installation service if required. Usually installation would be complete within two hours.

For the technically minded, *Kiwi Workstream* is delivered using the following technologies:-

- Intranet-based using Microsoft .NET™ technologies
- Cassini intranet server software
- T-SQL compliant database (VistaDB™ or Microsoft SQL Server™)
- Desktop access using Microsoft Internet Explorer™ (version 7 onwards)

## The Business Case ...

*Kiwi Workstream* gives you the means to improve the way your organisation operates, providing the framework you need to monitor and improve business performance and efficiency.

These are difficult benefits to quantify in direct financial terms; the checklist below highlights some of the comments made in the past as a guide to some of the benefits you could expect to achieve.

	Relevance to your business		
	Low	Medium	High
Supporting ISO 9001 adoption and conformance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clear view and control of workload	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do things the same way each time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clearly tell people what to do	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Filing properly and consistently	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Formalising and managing reviews	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Looking back to see where it went wrong – auditability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A place for everything and everything in its place	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to find documents easily	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Knowing who's doing what	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shifting admin tasks away from higher paid staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not having to remember what needs to be done or when	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clearing filing space for income earning use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
'One version of the truth' – documents accessible anywhere	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Concentrate on business revenue activities not administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>