



itvision
people with vision



Newsletter June 2022

Words from Nigel

One of the highlights of the last 12 months was the celebration of our IT Vision 30th Anniversary, in a period where average company longevity is declining (particularly in the technology sector).

We are privileged to have built strong and enduring relationships with many customers over this time, some that have endured the entire 30 years, and of these we are very proud.

In this newsletter, two of our founders reflect on their memories of some of these early and formative relationships that helped to form IT Vision in the first place. Our enduring relationship with valued customers in the beginning such as Katanning, Augusta Margaret River and Busselton along with more recent partnerships such as Gingin and Kalgoorlie-Boulder underpin who we are and what we stand for today.

Our Altus platform is at the heart of what we stand for. A modern evolution of traditional ERP business management systems that enable our customers to embark on their cloud and digital evolution journeys with an approach that is appropriate for them. It is extremely rewarding to be working with so many of our customers both planning as well as implementing this modernisation program which underpins how we will work together over the next decade.

Since the last newsletter, there have been many exciting milestones that provide significant value for our customers. We have achieved critical Australian Tax Office (ATO)



Single Touch Payroll (STP) accreditation; we have achieved international ISO-27001 Information Security accreditation and certification; together we have expanded the standardised local government chart of accounts program supported by Western Australian Local Government Professionals. As always, I can't wait to see what we achieve together in the next six months.

It has also been excellent to see the positive response to our recent STP Payroll webinars, Training Program and 'Ensuring Essential Services' campaign. We are investing heavily in our remote and online training technologies to ensure that this growing trend is well supported in coming years. We are also pleased to see the increased level of support for the IT Vision User Group with customers actively collaborating with each other to assist each other with critical knowledge and functions.

From myself, our founders and all of the staff at IT Vision I would like to thank you for your valuable support, participation and collaboration with us over the last year. We couldn't have done it without you.

Nigel Lutton
Chief Executive Officer, IT Vision

In this edition

- | | | | | | |
|----------|---|-----------|--|-----------|--|
| 2 | Words from Nigel | 7 | Altus Payroll Expands to Shires of York and Lake Grace | 12 | IT Vision achieves ISO-27001 Certification |
| 3 | Kalgoorlie-Boulder strikes gold with Altus Financials | 8 | Training Program for 2022-23 | 13 | Meet The Team |
| 4 | Shire of Plantagenet Upgrades to a Full ERP System | 10 | Smoother, Streamlined Payments Made Possible with SynergyOnline and Payrix | 14 | Strategic Product Roadmap |
| 5 | Introducing Altus Budgeting | | | | |
| 6 | Chart of Accounts Program Gains Momentum | 11 | A Look Back at Our Longest Serving Local Government Clients | | |

Kalgoorlie-Boulder strikes gold with Altus Financials



The City of Kalgoorlie-Boulder is a large local government servicing over 30,000 people in the Goldfields-Esperance region of Western Australia.

The City needed a comprehensive financial management and accounting system to modernise their current processes. Being a longstanding IT Vision customer and SynergySoft user, the City partnered with IT Vision in late 2021 to become an Early Adopter partner for Altus Financials, with go live expected late this year.

As IT Vision's largest product offering, Altus Financials is a comprehensive portfolio of financial tools delivered through a simple, highly engaging user interface. It is a cloud-based management system that translates older processes that were previously manual and paper-based and systemises them into a product that is easily accessible anywhere and at any time. The system is built with high levels of cybersecurity, business continuity, audit control, organisational governance, and workflow to ensure a seamless user experience.

"Altus Financials was developed in collaboration with real users based on real experiences, so we could ensure it met the ongoing needs of our current and prospective clients," said Product Manager Eliza Sbizzirri. "We see Altus as a constant work in progress. As our clients' businesses evolve, so do we."

The City of Kalgoorlie-Boulder is the second local government to adopt Altus Financials, after the Shire of Gingin went live in October 2020. As an early adopter, the Shire of Gingin played an active role in shaping the product and ensuring it was fit for purpose. Now, Altus Financials is being tested by a significantly larger local government authority in the City of Kalgoorlie-Boulder.

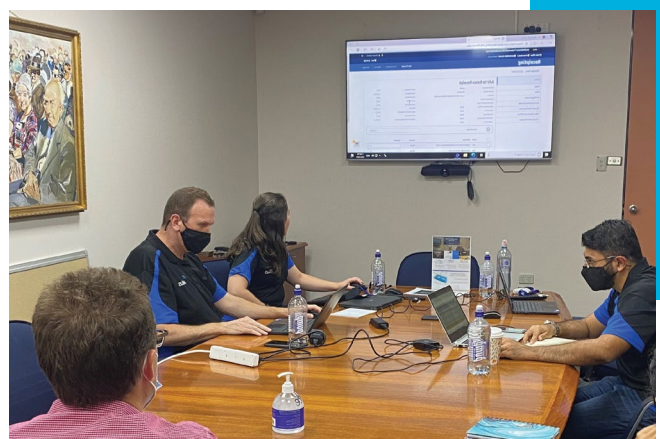
The IT Vision team have made regular visits to Kalgoorlie to work with City employees, understand their internal processes and made key modifications to the product based on the City's needs.



The IT Vision team communicates often with us, and we hold regular meetings to bring up issues and have them resolved in a collaborative manner.

**Martina Liu, Accountant
City of Kalgoorlie-Boulder**

The project is ongoing with phases of the implementation in progress, with completion expected in November 2022.



Shire of Plantagenet Upgrades to a Full ERP System



Located north of Denmark and Albany, the Shire of Plantagenet is situated in the Great Southern region of Western Australia and is managed from the town of Mount Barker. They began the internal process of re-examining their IT systems last year, identifying issues and backlogs in their processes stemming from a need of modernisation.

The Shire had been a customer of IT Vision's since 2004, having used SynergySoft Records. When assessing their IT needs for a comprehensive ERP system, many factors went into the decision making that led to the final selection of IT Vision.

“

All of the councils surrounding our area were on SynergySoft and Altus and we couldn't consider joint resource sharing without compatibility across IT systems.

John Fathers, CEO
Shire of Plantagenet

“There was so much to back up our decision in choosing IT Vision, including their significant local presence as a WA company. Their good reputation, customer service and support, and their user group were all factored in.”

The process from the moment IT Vision came on board to completion of implementation took 9 months, with the project administered in phases. Weekly virtual meetings were held between the Shire and IT Vision teams throughout the project and subject matter experts were dispatched to the Shire in each relevant phase of the project to provide support and ensure a smooth implementation. The full ERP system went live on July 1, 2021.

“The support from the IT Vision staff during the project was

incredible,” says John. “The support after launch has been excellent and ongoing for any issues that come up.”

Since the go-live last year, Shire staff have reported a noticeable relief on time and resources. Altus Payroll has replaced manual timesheets with a system that allows staff to complete timesheets on their laptops or mobile phones and receive real-time information for leave and payslips. Manual calculations and processes that previously took weeks for staff to complete now run through the system, saving countless hours and lessening margins of error.



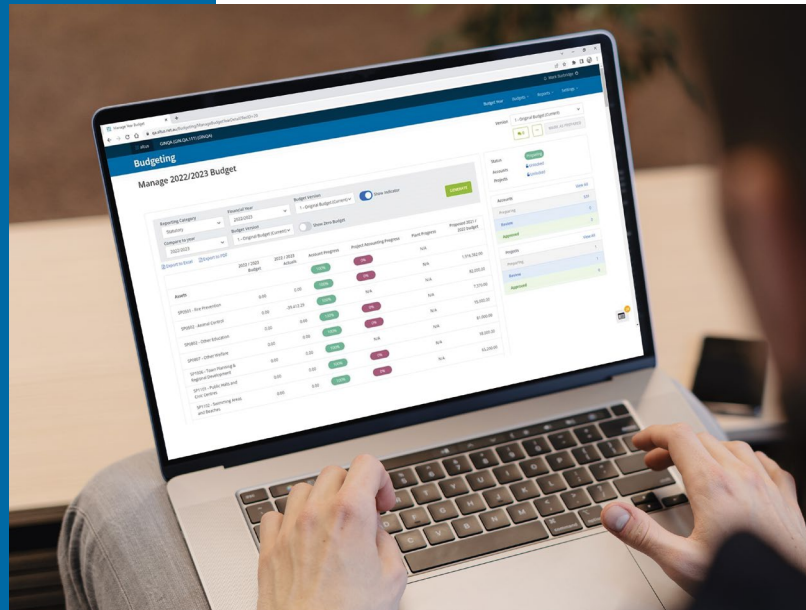
The audit season is another area benefitting from the upgraded system. The Shire's previous system was unable to create the reports auditors needed, creating more tasks and time taken for Shire staff to compile reports themselves. The upgraded system creates exactly what the auditors need, saving time and effort on both sides.

“From a general ledger point of view, we've now got a consistent and compliant chart of accounts and the process of preparing financial statements is more robust,” says John. “The procurement system is all online so people can do their purchasing orders with much more control built into the system to ensure purchasing policies are adhered to.”

We can't really fault anything. Everything is more efficient.”



Introducing Altus Budgeting



IT Vision has an exciting new product that is in the early stages of being introduced to our customers: Altus Budgeting.

Altus Budgeting builds upon our range of cloud-based Altus products, with tight integration to Altus Financials. Developed with local governments in mind, Altus Budgeting empowers organisations to consolidate and maintain the quality of budget data presently and into the future. Through systemisation of the budget workflow, what is often a long and difficult process is now managed with accuracy and efficiency.

The development of Altus Budgeting was inspired by working alongside our users to better understand what the typical budget preparation process looks like – who is involved, what parts are time consuming and what are the pain points? We quickly identified a major source of frustration and inefficiency was the collection of submissions from many sources and consolidating into a single view. Was anything missing? Has the appropriate Manager reviewed it? What if changes need to be made? These are the kinds of challenges Altus Budgeting aims to resolve.

“We expect Altus Budgeting will deliver huge accuracy and efficiency gains for our customers, particularly those who have a very manual budget preparation process currently,” says Mark Burbridge, Product Owner.



We hope the days of Council Accountants staring at manual spreadsheets into the early hours of the morning are over!

**Mark Burbridge, Product Owner
IT Vision**

“The first release of Altus Budgeting is now being rolled out to early adopters to gain feedback and help refine the product. Initial features include a systemised workflow to prepare, submit and approve budgets, tools to import and export the data for analysis, and integration to load the result into the accounting system. Paired with the same user interface as Altus Financials, Altus Budgeting allows many contributors to participate and collaborate in the budget preparation process – eliminating manual collection and consolidation of data.

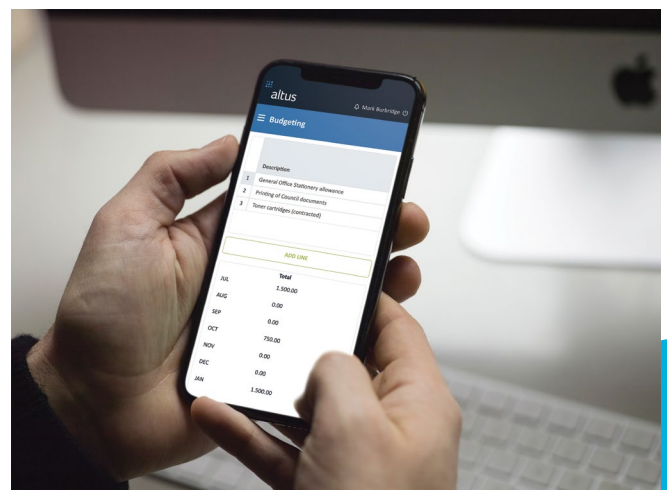
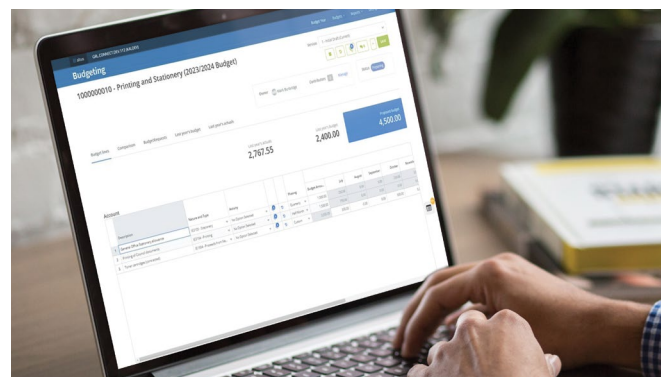


Chart of Accounts Program Gains Momentum

The Standard Chart of Accounts (Standard Chart) program aims to create consistency across Local Government financial systems to make it easier to share reports, documentation, and knowledge across the sector.

The Standard Chart was an initiative launched and led by the IT Vision User Group, with experienced IT Vision consultants brought on board to implement and execute the program in partnership with Local Government Professionals WA.

The Standard Chart includes the creation of a standardised numbering system in SynergySoft for general ledgers, jobs, cost centres, element types and more. It also ensures all accounting standards are met, including those imposed from state and federal departments.

Local Government Professionals WA, IT Vision, the IT Vision User Group and a representative from the Office of the Auditor General, came together in March 2022 to discuss the status of the project, to knowledge share and provide feedback on the process so far.

Rhona Hawkins, IT Vision User Group member and LG Best Practices consultant, said the Standard Chart continues to grow in complexity and strength as more local governments come on board.

“Local governments are all bound by the same reporting requirements so if you’re completing a tedious task or hitting a roadblock, you can bet there’s others out there struggling, too,” said Rhona.

“The standard COA is all about sharing resources and knowledge to get the best outcome for the sector across the board.”

Product Manager at IT Vision, Eliza Sbizzirri, said 19 of IT Vision’s customers have already adopted the Standard Chart. The Shires of Quairading, Mount Magnet, Ravensthorpe, Capel, Yalgoo, Wickepin, and Nannup are currently embarking on their journey this financial year and are aiming to go live with the Standard Chart by 30 June.



The standard COA program was an initiative launched and led by the IT Vision User Group (Pictured)

“Undertaking a COA restructure is a big task that requires significant input from key finance staff to successfully archive data and map and test the new chart prior to going live.”

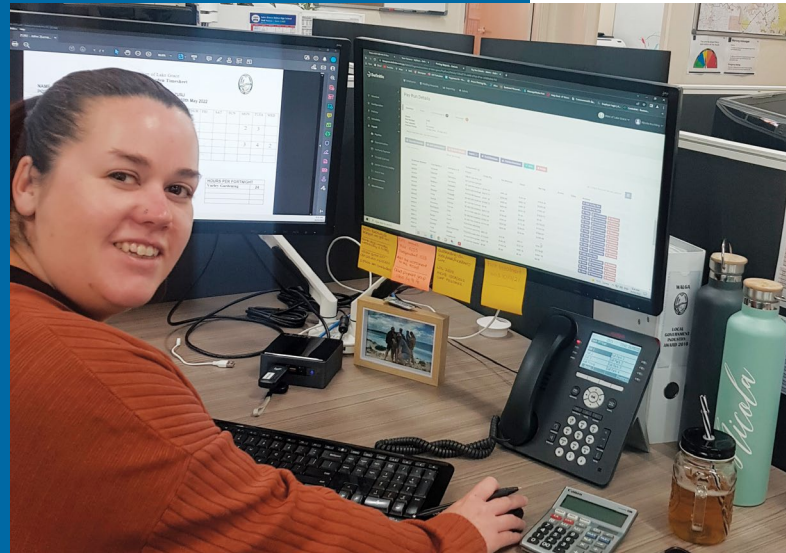
**Eliza Sbizzirri, Product Manager
IT Vision**

“Adopting the Standard Chart is just step one. Following this, we work with our customers to undertake an annual review, to ensure the ongoing integrity is maintained and they feel supported long term.”

Through our annual maintenance engagement, an experienced IT Vision consultant will complete an in-depth review of a client’s accounts to ensure all standards are maintained and where required, corrective action undertaken. This corrective action also takes into consideration the introduction of new accounting standards and the take up of any User Group approved inclusions since go-live.

The Standard COA is an important step in the process of getting “Altus ready”. If your organisation is ready to transition to the Altus platform or the standard COA next financial year, reach out to your IT Vision Account Manager for a proposal now to prepare your budgets accordingly.

Altus Payroll Expands to Shires of York and Lake Grace



We've welcomed two more clients to the Altus Payroll platform this year: the Shire of York and the Shire of Lake Grace.



Altus Payroll is a cloud-based people management platform that combines payroll and human resources needs to increase employee engagement, inform strategic decisions, drive efficiency and reduce internal expenses and administrative time. A highly intuitive platform, it is designed for use across all industries and can be customised to suit your organisation's unique, specific needs.

Altus Payroll is Single Touch Payroll compliant. Features include mobile apps for timesheet entries and clocking, leave applications and related approvals, customisable user security, integrated third-party payments, and integrated superannuation reporting and payments.

The Shire of Lake Grace's Finance Officer Nicola Ruchling was taken with the platform immediately after first seeing it during a visit to the IT Vision office in Perth nearly 2 years ago.

“
From a payroll point of view, we thought Altus was great and exactly what we needed.

**Nicola Ruchling, Finance Officer
Shire of Lake Grace**

“We were very much paper-based still and seeing a system that everyone could do from their phones was perfect for us.”

Lake Grace had to wait for budget approvals up to August 2021 at which point the project could get started with

IT Vision in early 2022. Since launching in May, Nicola says they have already seen increased efficiency in a short amount of time. “We had outside crew doing paper timesheets daily so I would have to scan them and enter them in manually,” she says.

“It's so much more convenient now and has cut my processing time down by half.”



Training Program for 2022-23



This is a great time to start thinking of your training needs and upskilling your staff. **We coordinate a range of professional development courses across Australia.**

Our courses cover a multitude of topics relevant to Local Government processes across both SynergySoft and Altus products. **Our current scheduled courses are below:**

2022 Course	Duration
Rangers	
Ranger Services (Infringements, Cats, Dogs, Renewals)	Half Day
Records	
SynergySoft Records User	Half Day
SynergySoft Records Admin	1 Day
SynergySoft Records User	Half Day
Reporting	
Front Counter (Receipting, Cats, Dogs, Dev Services, Rates Enquiries)	Half Day
Report Manager Intermediate	Half Day
Report Manager Advanced	Half Day
Systems Administration	
Systems Administration	1 Day
Rates	
Introductory Rates & Property Essentials (All States)	2 Days
Rates – Interim WA Rating	2 Days
Pensioners & Seniors Rates (WA)	1 Day
Payroll	
Introductory Rates & Property Essentials (All States)	2 Days
SynergySoft Payroll Essentials	2 Days
SynergySoft Payroll Leave Essentials	2 Days
SynergySoft Payroll Terminations	1 Day
Finance	
Finance Fundamentals	1 Day
Advanced Financials	1 Day
Creditors & Debtors	1 Day
Excel Integration	1 Day
Altus Procurement	1 Day

Scan the QR code for more information on our Training Program



2023 Course	Duration
Reporting	
Front Counter (Receiving, Cats, Dogs, Dev Services, Rates Enquiries)	Half Day
Systems Administration	
Systems Administration	1 Day
Rates	
SynergySoft End of Year Rates & Billing (QLD)	1 Day
Rates Modelling (WA)	1 Day
Pensioners & Seniors Rates (WA)	1 Day
Introductory Rates & Property Essentials (All States)	2 Days
Rates – Interim WA Rating	2 Days
SynergySoft End of Year Rates & Billing	2 Days
Payroll	
Altus Payroll Essentials	2 Days
SynergySoft Payroll Essentials	2 Days
SynergySoft Payroll Leave Essentials	2 Days
SynergySoft Payroll Terminations	1 Day
SynergySoft End of Year Payroll	Half Day
Altus End of Year Payroll	Half Day
Finance	
Finance Fundamentals	1 Day
Advanced Financials	1 Day
Excel Integration	Half Day
Altus Procurement	1 Day
Creditors & Debtors	1 Day
End of Year Financials	1 Day

Smoother, Streamlined Payments Made Possible with SynergyOnline and Payrix



SynergyOnline allows users to access, query, lodge, track and make payment for key Council services utilising secure web payment solutions.

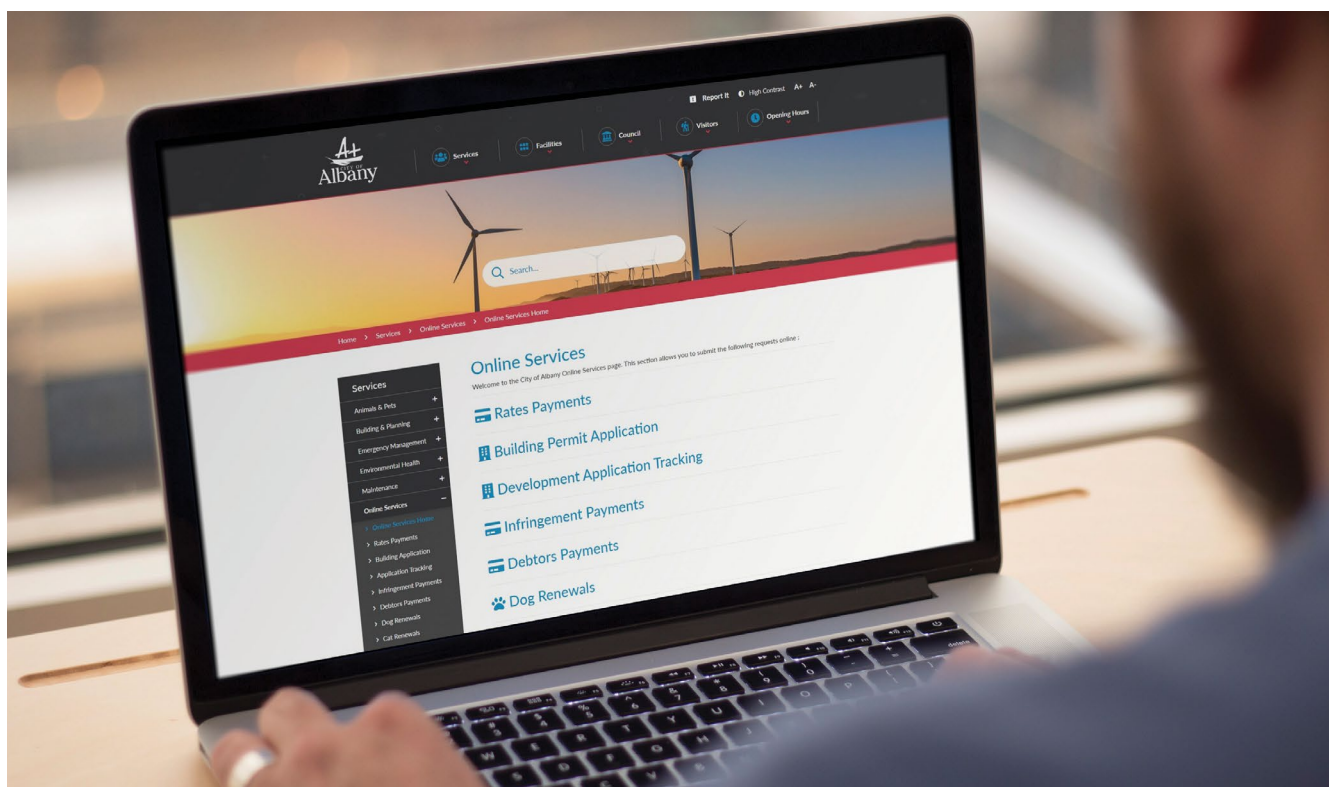
SynergyOnline encourages a 'self-service' approach and enables community members to pay their rates, infringements, pet renewals and building applications online. Data instantly translates with the local government's internal SynergySoft ERP system, creating significant administrative efficiencies for any organisation.

While SynergyOnline can integrate with most payment gateways, IT Vision customers are particularly enjoying increased efficiency and streamlining in their payment processes since adopting Payrix.

Payrix is a provider of embedded payment solutions, helping businesses and governments monetise their platforms by offering customers a payment gateway embedded within their websites, eliminating friction in the user journey by keeping them on the site without the need to transfer them to a third-party page.

Payrix's payments API enables organisations to access all payment channels through a singular provider – mobile, online, point-of-sale, recurring payments, and invoicing. Organisations can also save time with automated payment tasks such as re-attempting failed payments, account reconciliation, and real-time processing.

To learn more about SynergyOnline or Payrix, email sales@itvision.com.au



A Look Back at Our Longest Serving Local Government Clients



For more than 30 years, IT Vision has been building relationships with clients from several industries, a key sector of which is local government across Western Australia. Information technology has changed significantly over the decades and the depth of the relationships developed through innovation and collaboration is nothing short of remarkable.

Working with local governments aligns with our corporate vision of enhancing the productivity and service quality of those that serve the communities in which we live. We wanted to highlight the enduring relationships with a few of our local government clients as a token of our appreciation for the years we have worked together, taking a walk down memory lane with insights and recollections from IT Vision's founders Alan Smith and Earl Ward.

Alan and Earl's work with local government began with the then-Shire of Busselton, now City of Busselton, and the Shire of Augusta-Margaret River in 1984. The relationship with these shires is especially notable in that it established the groundwork for what would become IT Vision, launched as Vision Computer Systems in 1991.

"Back in 1984, the shires were working together to champion a brand-new local government software package that was going to change the Australian local government applications software scene," said Earl.

The software manufacturing venture and the Shire's locations coincided to develop the winegrowing culture and tourism industries in the southwest of Western Australia. Earl attributes the success of IT Vision's past and current products to the progressive vision of the Shire staff in those early days. "Administrator, then SynergySoft, and now Altus in part owe their existence to those adventurous and innovative people who invested their efforts to champion and implement new systems."

Another early innovator in the IT Vision history is the Shire of Katanning. As with the staff at the City of Busselton and

Shire of Augusta-Margaret River, Katanning's staff were forward thinkers who saw a future in digitisation.



“ Numerous staff at Katanning were quite progressive and wanted to be part of our journey, along with other friendly user group members who were making good inroads on their digitisation journey.

**Earl Ward, Founder
IT Vision**

"They enthusiastically helped us identify improvements to our software, were willing to try out new features, and showed other councils how they best deployed the software."

Alan recalls the years working with Augusta-Margaret River and Busselton as the start of a "wonderful journey" with ties that have stood the test of time. "Both of these shires highlight the nature of local government which I've always looked upon as a tight knit community where people mix, communicate, and share," he says. "Working within the local government community means that relationships are built and last for many years."



IT Vision achieves ISO-27001 Certification

After 18 months of preparation, IT Vision was proud to achieve ISO-27001 Certification in late December 2021.

ISO-27001 is an international standard on how to manage information security. It offers an organised approach on how to maintain confidentiality, integrity, and availability of information systems in an organisation. It includes policies, procedures, processes, and systems that work to manage information security risks.

An external and independent auditor examined all aspects of IT Vision’s business processes and recommended the business for certification and, in December 2021, we received our ISO-27001 certification.

As an ISO-27001 certified organisation, IT Vision’s people, processes, tools, and systems all adhere to the internationally recognised framework.



While achieving this information security standard required active involvement from all IT Vision staff members, there was a dedicated project team who worked around the clock to ensure all systems and processes were where they needed to be. This was lead by Chief Technology Officer, Adrian Halid, Guy Brown (Business Services Manager) and Sourabh Sharma (Security Officer).

Governance and Compliance Officer, Amanda Murray, has since joined the IT Vision team to take charge in managing the ongoing obligations and responsibilities of retaining ISO-27001 compliance.

Meet the team



Luke Emery
Professional Services Manager

Luke joined IT Vision this year in the role of Professional Services Manager. He provides leadership to the Professional Services department which includes product support, client implementation, project management and training.

His career started in the IT industry as a systems engineer who was responsible for the support, design, and implementation of IT solutions for clients. Most recently, Luke was a Service Desk Manager where he was responsible for hardware and software computers for approximately 2,000 end users that were on 26 sites across WA.

Luke has had his fair share of customer facing roles in his career and is a strong believer in showing people the “other

side of IT”. His experiences in the IT industry give him a unique perspective and his people management skills work hand in hand for his current role with us.

When he’s not helping customers and his team, Luke keeps active with running and weightlifting. He’s also quite the musician! He and his son play guitar and the ukulele together during their spare time. Luke and his family are avid campers and have their own camper trailer to take with them. Every so often, you’ll even find Luke indulging in some online gaming!

Having Luke on our team provides us with a wealth of experience and knowledge at IT Vision.



Mark Harris
Project Manager

Mark is one of our Project Managers here at IT Vision with a particular focus on coordinating with key stakeholders, and ensuring governance is followed on projects.

With 20 years in the IT industry under his belt, Mark brings his expertise and experience on a day-to-day basis helping us improve solutions for our clients. Mark has a particular focus on the ERP installs which is one of our major products, delivering solutions with SynergySoft and Altus.

During his downtime, you can find Mark in and around the water. Mark loves to go diving, boating, and snorkeling along our beautiful coastlines and hopes to live on a boat when he retires! He’s an indoor plant enthusiast and owns a dog that he claims weighs more than most of the people in the office. Mark also relaxes by enjoying an icy cold beer with friends and jumping into the weights at the gym.



Eva Christensen
Implementation Consultant

Eva joined the IT Vision team early this year as an Implementation Consultant specifically focusing on reporting and compliance. New to the IT industry, Eva is enjoying being immersed in learning about a new industry and all that comes with it.

A day for Eva consists of setting up and testing the Altus BI dashboards with reports for customers. She also leads ‘Discovery’ workshops with new customers.

Eva has a well-rounded understanding of business and studied a Bachelor of Commerce at Curtin University. After finishing university, Eva spent 5 years at a not-for-profit organisation in Subiaco, helping university students learn more about economics and philosophy.

She was often tasked with bringing old legacy systems/ documentation together and implementing new and improved processes organisation wide.

When Eva isn’t in the office, she is looking after her 8-month-old son who she says is always up to some sort of mischief. She also enjoys cooking, reading, and playing fetch with her dog. Fun fact about Eva: she was born in the beautiful city of Copenhagen, Denmark!

Eva is an enthusiastic team member and is thrilled to implementing her skills in a fast-moving industry. She has a passion for problem-solving and enjoys trouble-shooting issues that need to be resolved.

Strategic Product Roadmap

H2

Q1



altus

2022 JAN-JUN

Altus Readiness

SynergySoft Data Analysis

Altus Bank Reconciliation

Performance Improvements

Altus Procurement for SynergySoft

Feature Enhancements

Altus Budgeting New Module

Altus BI

Financials Reporting
Building & Planning Reporting

Altus Payroll

Teams Feature
Single Touch Payroll 2 (STP2)
Altus Financials Integration
Onboarding

SynergySoft Payroll

Single Touch Payroll 2 (STP2)

SynergyOnline

Enhanced Payment Gateway
Integration

2022 JUL-SEP

Altus Platform

App Launcher

Altus Purchasing

Standing Orders

Altus Receipting

End of Day Process

AssetFinda

SynergySoft Integration

SynergySoft Receipting

Real-Time Integration

Online Permit Management

SynergySoft
Integration Greenlight

Altus Security

Single Sign On



Q2

Q3

Q4

2022 OCT-DEC

Altus Receipting

Additional Import Features
Real-Time Integration

SynergySoft Water Billing

Taggle Integration

Altus Upgrade

Automation Tools

Altus Help Centre

In App User Guides

Altus BI

Purchasing Analysis
Assets Analysis

- ✔ **Altus Financials Early Adopter 2 Go Live**

2023 JAN-MAR

Altus Accounts Payable

eInvoicing

Altus Budgeting

Automation Features

Altus Debt Recovery

Accounts Receivable

Altus Platform

Sandpit Environments

Altus Plant Accounting

Fuel Tax Credit Automation

Altus BI

Purchasing Analysis Assets
Analysis

- ✔ **Altus Financials General Availability**

2023 APR-JUN

- 📌 **Altus Procurement**

New Module
Integration with Altus
Financials

Altus Readiness

Enhanced Data Analysis

Altus BI

Debt Management
Analysis

IT Vision's Strategic Product Roadmap represents our vision of what we intend to deliver in the short to medium term. Technology and product demands are constantly evolving, often at a pace that makes it difficult to anticipate what requirements will exist in 12 months' time. Therefore, timeframes remain subject to change.

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