Memo to: Ella, Greg, Hoai, Jackie, Nancy, Pete, Will

From: Karol

Subject: Project task lists

Date: Jan. 9, 1985

cc: Jack, John Bruzas, Kevin Walsh, Leilani, Pam, Shelley

Since we have begun having meetings and developing task lists several
forms of list have emerged all of which have some very good aspects.
I have been somewhat involved in all of the projects and have dealt
with all of these lists, as a result, I have come up with the attached
"outline" which I would like everyone to follow for their lists. The
main reason for this is consistancy and to insure that nothing gets
overlooked. It is not necessary to completely rewrite your current
task lists or change the personal style of your task list, but make
sure that your list is organized into the various sections shown and
that all of the items shown on the outline are on the list for your
project.

Let me know if you feel I have left anything out. Also, Ken has
expressed a desire to have copies of your task lists sent to him. He
does not need to get them on a weekly basis, perhaps monthly or
whenever there has been a significant change.

Thanks.

Development Project
                     Task List Outline

(Be sure and put the current date at the top so people know that they
have the latest list. Some people have also put the time on their
list).

Task	Resp.	Status/ Target

I. Development tasks

    -This should be a very brief description   (Who)   (When,
     of each of the major development tasks.   "Done",
     It also helps to group the tasks by   "ongoing"
     function and/or module.   etc.)

II. Product implementation

     -This should include all tasks performed by
      Software Services that involve setting up of
      accounts, configuration control, installation
      procedures, documentation for delivery and
      installation, etc.   Some of the points to
      cover would be:

                A.   QA implementation
                B.   Demo account implementation
                C.   Timesharing implementation
                D.   Production implementation
                E.   Installation procedures
                F.   Installation documentation
                G.   Installation checklist
                H.   Installation test data/procedures

III. Product testing

     -This should include the testing tasks for this
      version of the product.

IV. Documentation

     -This should include a list of the tasks to be
      completed by PUBS before the delivery date for all
      user documents associated with the product including
      class materials when appropriate but not including
      technical documentation.   Some points to cover:

                A.   Editing/writing tasks
                B.   Data for creating sample screens/reports
                C.   Art work for covers/binders

D.   Production (Laser, pasteup, edit, etc.)

V.   Beta testing

-This should include the assignment and scheduling of
 tasks to insure that the product gets beta tested and
 that there will be resources assigned for supporting
 and monitoring the beta test sites.

VI.   Marketing

-This should include any tasks to be completed by Product
 Marketing for product rollout.   Some of these would be:

    A.   Demo setup & Demo kit
    B.   Datasheet, brochure, other literature
    C.   Sales guide
    D.   Field training
    E.   Product introduction
    F.   Beta test monitoring
    G.   Communication with field/clients

VII. Product Release

-This should include tasks associated with the release
 and delivery of the product such as:

    A.   Release schedule
    B.   "Package" content definition
    C.   List of clients
    D.   Release note production
    E.   Communication with field

VIII. Miscellaneous tasks

-This should include any tasks associated with production,
 release and delivery of the product that are not included
 above.   An example would be any special client requirements
 for support or development. or production/updating of
 technical documentation.

Memo to: All Ross Systems Employees

From: Karol

Subject: New Organization in R&D

Date: June 19, 1985

Ross Systems is about to enter a new phase as a software company.
Over the past 2 1/2 years, we have concentrated on delivering new
products and we now have a strong set of products "on the street".
Now is the time for us to focus on stabilizing, integrating and
enhancing our current products. This process includes putting more
emphasis on the core, the building blocks, the technology, the
architecture of our products. Concentrating on this area while
continuing to focus on the stabilization of the products, will allow
us to remain a strong viable software product organization so that we
can continue to be competitive and position ourselves to easily add
new products, integrate to other products and be prepared to move our
products to other environments if this seems desirable.

With this in mind, we are reorganizing Product Development to allow us
to obtain this strength and continue our focus of putting a major
effort into enhancing, stabilizing and integrating our products. The
new organization will be structured to more effectively utilize the
experience and expertise of everyone and to provide a more uniform and
consolidated effort in developing and maintaining our products. The
'development team' concept will be utilized as required in all of
Product Development's efforts to deliver our products in a timely and
efficient manner. The new organization will consist of a new Product
Architecture group and two Product Development groups.

The Product Architecture group, headed by Will Wong, will be
responsible for the development and implementation of new hardware and
software technologies, the architectural design and operating
environment generalized modules ('black boxes') and utilities, the
assembly and implementation standards for all of RSI's software
products. In addition, the group will be responsible for the
non-accounting products such as MODEL, DB, MICROLINK, GRAPH, etc. and
for other special software products or interfaces.

The two Product Development groups will be responsible for the
functional aspects of the products. Their efforts will be concentrated
towards the development and maintenance of the 'accounting' modules of
the products as well as the defining and monitoring of the development
processes. The groups will also provide consulting support of our
accounting products, the analysis and definition of new
applications/features (eg. internationalize the products) and the
guidelines for project tracking and problem reporting/resolution.

Greg Wheelwright will head one of the Product Development groups and
will be responsible for the Accounts Payable, Accounts Receiveable and

Stock Option products. In addition, his group will define the guidelines for the product development and problem reporting processes.

Hoal Ta will head the second Product Development group and will be responsible for the General Ledger and Fixed Assets systems. His secondary responsibility will be product consulting services for such investigations as the internationaliztion of our products or the feasibility studies of new products or enhancements.

This new organization structure is effective immediately. Actual implementation of new responsibilities will be phased over a reasonable period of time in order to minimize the impact on current development and support schedules. Further definitions of group's responsibilites and personnel structure will follow as appropriate as the new Product Development group changes and evolves to the new structure. Product questions and problem reporting/resolution should continue to be addressed by your current contacts. You will be informed of any new contacts or procedures as changes are implemented.

We are looking forward to an exciting year for Ross Systems in the R&D area as well in all other areas in the company. We have an agressive schedule of product releases planned and are very hopeful that this new organization will help us to continue improving our ability to produce quality products in a timely fashion.

Memo to: Product Marketing, Software R & D, National Support,
              Regional Support

From: Karol

Subject: Product Meeting Schedules

Date: August 6, 1985

Attached is the current meeting schedule and the list of product
teams. The Product Development Leader is responsible for conducting
the meetings. Note that the team list contains only the names of the
team "leaders" in the 6 seperate product functions. A product team
may have many more members on it. As always, it is the responsibility
of the Product development leader to know who is on the team outside
of these five people and for scheduling a place for the meetings and
notifying the other members of the team if the schedule, time or place
changes.

August 85   Product Meeting Schedule

                Product   Time/Place   Chair

Monday   NO MEETINGS!

Tuesday   MAPS/GL   2:00 1860 conf.   Pete Pffeferkorn

Wednesday   MAPS/FA   9:00 1860 conf.   Hoai Ta
                MAPS/AR   10:00 1860 conf.   Nancy Lee

Thursday   MAPS/AP   9:30 1860 conf.   Jackie Gage

Friday   NO MEETINGS!

These meetings are held weekly or bi-monthly as needed. The Product
Development Leader will keep all team members informed of the current
schedule.

The following products will be addressed in ad-hoc meetings called by
either the Product Development Leader or the Product Manager.

            MAPS/DB
            MAPS/MODEL
            MAPS/MICROLINK
            MAPS/PRO
            MAPS/GRAPH (& Pro Graph)
            MAPS/ISO

Software Product Teams

Product	Position	Member
MAPS/AP	Product Manager	Tim Bostwick
	Product Development Leader	Jackie Gage
	Publications Coordinator	Pam Eaken
	Product Control Coordinator	Winnie Chow
	Product Testing Coordinator	Dianna Harrison
	National Support Rep	Bob Laughlin
	Product Expert – EST	Charlie Schibener
	WST	Clair Erskine
MAPS/AR	Product Manager	Jack Brown (acting)
	Product Development Leader	Nancy Lee
	Publications Coordinator	Joann Youngman
	Product Control Coordinator	Winnie Chow
	Product Testing Coordinator	Dianna Harrison
	National Support Rep	unassigned
	Product Expert – EST	Bernie Mclaughlin
	WST	Kristin Robertson
MAPS/FA	Product Manager	Tim Bostwick
	Product Development Leader	Hoai Ta
	Publications Coordinator	Brian Cutter
	Product Control Coordinator	Trudy Reese
	Product Testing Coordinator	Winnie Chow
	National Support Rep	unassigned
	Product Expert – EST	Barbara Swift
	WST	Rauf Ubaji
MAPS/GL	Product Manager	Linda Dries
	Product Development Leader	Pete Pfefferkorn
	Publications Coordinator	Pam Eaken
	Product Control Coordinator	Trudy Reese
	Product Testing Coordinator	Dianna Harrison
	National Support Rep	Bob Laughlin
	Product Expert – EST	Joan Jackson
	WST	Maria Kravatz
MAPS/ISO	Product Manager	Jack Brown (acting)
	Product Development Leader	Jackie Gage
	Publications Coordinator	Pam Eaken
	Product Control Coordinator	Trudy Reese
	Product Testing Coordinator	Trudy Reese
	National Support Rep	unassigned
	Product Expert – EST	Joan Jackson
	WST	Rauf Ubaji
MAPS/DB	Product Manager	Jack Brown
	Product Development Leader	Bill Hurja

	Publications Coordinator	Brian Cutter
	Product Control Coordinator	Trudy Reese
	Product Testing Coordinator	Trudy Reese
	National Support Rep	John Benedict
	Product Expert - EST	Charlie Schribner
	WST	Pam Black

MAPS/GRAPH

Product Manager	Jack Brown
Product Development Leader	Will Wong
Publications Coordinator	Pam Eaken
Product Control Coordinator	Winnie Chow
Product Testing Coordinator	Winnnie Chow
National Support Rep	unassigned
Product Expert - EST	Joan Jackson
WST	Pam Black

MAPS/MICROLINK

Product Manager	Linda Dries
Product Development Leader	Greg Wheelwright
Publications Coordinator	Joann Youngman
Product Control Coordinator	Trudy Reese
Product Testing Coordinator	Trudy Reese
National Support Rep	unassigned
Product Expert - EST	Bernie Mclaughlin
WST	Pam Black

MAPS/MODEL

Product Manager	Linda Dries
Product Development Leader	Greg Wheelwright
Publications Coordinator	Joann Youngman
Product Control Coordinator	Winnie Chow
Product Testing Coordinator	Winnie Chow
National Support Rep	John Benedict
Product Expert - EST	Joan Jackson
WST	Pam Black

MAPS/PRO
(& PRO Graph)

Product Manager	Jack Brown
Product Development Leader	Greg Wheelwright
Publications Coordinator	Roberta Stone
Product Control Coordinator	Winnie Chow
Product Testing Coordinator	Winnie Chow
National Support Rep	unassigned
Product Expert - EST	Joan Jackson
WST	Pam Black

MEMO TO: ALL ROSS EMPLOYEES

FROM: Karol Hines

SUBJ: Organization of Software R & D

DATE: August 20, 1985

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The attached document is an up to date version of the
"organization" of R & D and of how Product Development happens.
There seems to be some confusion about who to call with a question or
problem and who is responsible for what. This should help clarify who
is responsible for what. As far as who to call, please read John
Benedict's recent memo on National Support procedures that was
distributed to the Regional VP's and Regional Technical Services
Directors.

August 1985

SOFTWARE PRODUCT
RESPONSIBILITIES

The purpose of this document is to provide a picture of how Software
R & D is organized, how we function and what some of our
responsibilities are.

There are 5 departments in Software R & D:

Applications Product Development (there are two of these) -
Responsible for the development and maintenance of application
products (MAPS/GL, MAPS/AP, MAPS/AR, MAPS/FA, MAPS/ISO).

> Manager (Group 1 - MAPS/AP, MAPS/AR, MAPS/ISO)-
> Greg Wheelwright (Director, Appl. Prod. Dev.)

> Staff -   Jackie Gage (part time)
> Nancy Lee
> Contractors as needed

> Manager (Group 2 - MAPS/GL, MAPS/FA) - Hoai Ta (Director,
> Appl. Prod. Dev.)

> Staff -   Paul Houtz
> Pete Pfefferkorn
> Vince Chen (temporary assignment)

Software Product Architecture - Responsible for the the
architecture of all software products, including I/O and video
modules; database design; installation procedures, etc.. Also
responsible for development and maintenance of all decision
support products (MAPS/MODEL, MAPS/DB, MAPS/GRAPH, MAPS/PRO
GRAPHICS, MAPS/MICROLINK).

> Manager - Will Wong (Senior Director, Product Architecture)

> Staff -   Bill Hurja
> David Saint-Gelais

Publications and Training - Responsible for writing and producing
all user (and in the future, technical) documentation and
training materials for our software products.

> Manager - Pam Eaken (Manager, Publ. & Training Dev.)

> Staff -   Brian Cutter
> Joann Youngman

Software Services - Responsible for configuration control and
product Q/C for all of our software products.

Manager - Leilani Holzerlandt (Manager, Software Svcs.)

Staff -   Winnie Chow
          Dianna Harrison
          Trudy Reese

As you can see, we are organized along functional lines. The
Development Groups along with Product Architecture, do the design
(technical and functional) and specification, which are reviewed by
Product Management, Publications, Software Services and the field when
appropriate. They then proceed with the programming and initial
module testing of the products and turn them over to Software Services
who controls all of the product versions and does module and system
testing. Product Architecture, in the mean time, designs and produces
the installation procedures for each product which are also turned
over to Software Services for implementation and testing.
Publications is involved at every step of the development process so
that they can time the production of the documents as closely as
possible to the release of the product.

Actual day-to-day work is organized more around individual products
than along these functional lines. All schedules, task lists, etc.,
are done by product rather than by function, with each function being
addressed for each product. Therefore, we are organized into Product
Teams as well. The product teams include members from each of the R&D
departments as well as a Product Manager from Marketing and the field
product experts. The teams work very closely to monitor the status
and progress of each product to assure its quality and timely delivery
to the field and our clients and to provide our clients with the best
possible support. Attached is a list of the current product team for
each product. You will notice that each team consists of the
following members:

    Product Manager - A member of the Product Marketing Group who has
    an overall responsibility for the product, as outlined by
    Marketing. This includes general product direction; coordination
    of the product planning process; definition of product functional
    needs and requirements; coordination of all collateral material
    for the product; liaison between the field, clients and R & D;
    coordination of product release/introduction; competitive
    analysis and coordination of field training.

    Product Development Leader - This person is from one of the
    development groups and is responsible for coordination of all
    development tasks in addition to participating in the design and
    development. Other specific responsibilities of the PDL are:

    - Scheduling of development tasks

    - Maintaining master schedule(s) for project(s) associated with
      their product

    - Scheduling and conducting periodic status meetings for their

product team (weekly for projects on critical path)

- Producing status reports for their product and associated
  projects

- Evaluating and responding to all SPR's submitted for their
  product, including producing periodic SPR status report

- Communication and coordination with Product Management and other
  areas of R & D

Publications Coordinator - This person is from the Publications group
and is responsible for coordinating all efforts associated with the
user documents to be produced for the product, including manuals,
class materials and primers. They will attend product status
meetings, and organize meetings to discuss particular documents when
necessary.

Product Control Coordinator - This person is from the Software
Services group and is responsible for implementation of all
new/improved modules and for configuration control of the product

Product Testing Coordinator - This person is also from the Software
Services group and is responsible for coordinating all testing of the
product, including production of test plans, creation of test data,
actual testing and evaluation of test results.

Field Product Expert - This person is from either the Field Consulting
or Field Client Support staff (there will be one in each region) and
is responsible for "front line" support of their assigned product in
their region. Their responsibilities will include:

- Acquiring a full functional and technical understanding of the
  product by attending training sessions at Corporate and working
  closely with the other members of the Product Team. They may be
  asked to participate in new product rollouts and attend some of the
  regularly scheduled product meetings (EST may attend via speaker
  phone).

- Answer questions from other field employees about the functional and
  technical aspects of the product.

- Work with other field employees in attempting to solve client
  problems and determine if corporate resources need to be consulted.

- Participate in product "production" functions such as testing and
  editing documentation as much as is feasible. This is primarily for
  the purpose of getting feedback from the field at as early a stage
  as possible.

- Work closely with Beta test sites.

- Form a communications link between Corporate (National Support,
  Product Marketing and R & D) and the field.