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# IN THE UNITED STATES PATENT AND TRADEMARK OFFICE BEFORE THE TRADEMARK TRIAL AND APPEAL BOARD

Proceeding	91232514
Party	Defendant SXG Investments Pty Limited
Correspondence Address	JEFFREY H GREGER LOWE HAUPTMAN & HAM LLP 2318 MILL RD, STE 1400 ALEXANDRIA, VA 22314-6878 UNITED STATES jhgreger@ipfirm.com, kbaird@ipfirm.com, docketing@ipfirm.com, JHGGroup@ipfirm.com 703-684-1111
Submission	Defendant's Notice of Reliance
Filer's Name	Jeffrey H. Greger
Filer's email	jhggroup@ipfirm.com, jhgreger@ipfirm.com
Signature	/jhg/
Date	08/12/2019
Attachments	8-12-19 Applicants Notice of Reliance.pdf(122040 bytes ) Declaration of Gomes - Part 1 - 0001-0020.pdf(4951219 bytes ) Declaration of Gomes - Part 2 - 0021-0040.pdf(3292729 bytes ) Declaration of Gomes - Part 3 - 0041-0060.pdf(1992761 bytes ) Declaration of Gomes - Part 4 - 0061-0074.pdf(1759547 bytes ) Exhibit 1 - 0001-0014.pdf(973879 bytes ) Exhibit 2 - Part 1 - 0001-0040.pdf(4416864 bytes ) Exhibit 2 - Part 2 - 0041-0080.pdf(5916797 bytes ) Exhibit 2 - Part 3 - 0081-0100.pdf(1758764 bytes ) Exhibit 2 - Part 4 - 0101-0120.pdf(1973313 bytes ) Exhibit 2 - Part 5 - 0121-0140.pdf(1748781 bytes ) Exhibit 2 - Part 6 - 0141-0160.pdf(1391940 bytes ) Exhibit 2 - Part 7 - 0161-0204.pdf(4774130 bytes ) Exhibit 3 - 0001-0026.pdf(2086914 bytes ) Exhibit 4 - 0001-0013.pdf(4420567 bytes )

# IN THE UNITED STATES PATENT AND TRADEMARK OFFICE TRADEMARK TRIAL AND APPEAL BOARD

In the matter of:	SXG Investments Pty Limited					
Application No.	86/143,360					
Mark:	FOCUSED PATIEN	T CARE				
Information B	Builders, Inc.,	)				
Oppos	eer	) Opposition No. 91232514				

SXG Investments Pty Limited

Applicant.

v.

#### APPLICANT'S NOTICE OF RELIANCE

Applicant, SXG Investments Pty Limited, hereby gives notice that it will rely on the following:

Declaration of Applicant's principal Steve Mike Gomes

#### Exhibit 1

Defendant Information Builder's written response to Request No. 15 of Applicant's Requests for Documents and Things. The response to Request No. 15 is relevant because it establishes there is no demonstrable evidence of even a single instance of confusion or possible confusion with respect to Opposer's marks and any third party's use of any marks despite longstanding uses.

#### Exhibit 2

Actual uses on the internet of the mark FOCUS and FOCUS formative marks referencing software goods which include functions similar to the functions of Opposer's FOCUS and WEBFOCUS software. The evidence is relevant because it shows the nature of similar marks on similar goods a pertinent likelihood of confusion factor.

#### Exhibit 3

Internet references defining the term Business Intelligence (BI). This is relevant because BI is a term of art and the meanings in context will assist with the determining the scope of the Opposer's software goods and services.

#### Exhibit 4

Registered mark FOCUS MD with current internet uses. Relevant as to the similarities in the marks at issue, the issue of strength of the mark of lack thereof, and the function of medical billing and overlap with features which Opposer touts with it FOCUS-formative marks used in the health field. The actual is relevant because it shows the nature of similar marks on similar goods a pertinent likelihood of confusion factor.

Applicant will rely on all documents and evidence submitted by Opposer with its Notice of Reliance. Applicant will rely on the deposition/witness testimony of Gerald Cohen on behalf of himself and Opposer.

Respectfully submitted, HAUPTMAN HAM, LLP Attorney for Applicant

By: /s/ Jeffrey H. Greger
Jeffrey H. Greger
Hauptman Ham, LLP
2318 Mill Road, Suite 1400
Alexandria, VA 22314
Phone: (703) 684-1111

E-mail: jhgreger@ipfirm.com

Dated: August 12, 2019

#### **CERTIFICATE OF SERVICE**

The undersigned hereby certifies that a copy of the foregoing was filed using the TTAB's ESTA system which provides a copy to all attorneys of records and a copy is being sent by e-mail to the following person(s):

Howard F. Mandelbaum Mandelbaum Silfin Economou LLP 222 Bloomingdale Road, Ste. 120 White Plains, NY 10605 email: hmandelbaum@msellp.com; docketing@msellp.com

Dated: August 12, 2019 /s/ Jeffrey H. Greger

Jeffrey H. Greger

# IN THE UNITED STATES PATENT AND TRADEMARK OFFICE TRADEMARK TRIAL AND APPEAL BOARD

In the matter of: SX	G Investments Pty Lin	nited
Application No.	86/143,360	
Mark:	FOCUSED PATIE	ENT CARE
Information Oppo v.	Builders, Inc.,	) ) ) Opposition No. 91232514 )
Appl	ments Pty Limited icant.	) ) ) ARATION OF STEVE MIKE GOMES
	es, declare as follows:	THE STEVE WITH GOINES
	/ Ltd (Rauland) and hav	t SXG Investments Pty Limited (SXG), and Rauland ve been so since 1992 in respect of Rauland and October
2. I am a techno	ology entrepreneur and	I have specialized in delivering information technology

(IT) solutions and systems to the healthcare industry over the past 27 years. I have a deep

understanding of the functionality of IT solutions and systems and the interoperability

between software and hardware. In my roles at Rauland and SXG I am constantly liaising

with IT professionals and I employ a number of software engineers and other IT

professionals in my business.

3. SXG specializes in the field of healthcare and sells a technology hardware and software

system using the trademark FOCUSED PATIENT CARE.

4. SXG acquired all rights in the name FOCUSED PATIENT CARE from Rauland on 13

November 2013.

5. Rauland is a wholly owned subsidiary of SXG. Hereinafter SXG and Rauland are referred

to jointly and severally as SXG.

6. SXG has used the trade mark FOCUSED PATIENT CARE in Australia through its

predecessor in interest Rauland continuously from at least as early as 2002. SXG continues

to use the trademark FOCUSED PATIENT CARE in Australia and continuously for the

last seventeen years.

7. I have access to the records of SXG for the purpose of making this declaration. The

statements I make in this declaration are based on information contained in the records of

SXG; within my own personal knowledge; and/or obtained from officers within SXG.

8. SXG is the owner of Australian registration number 1591048 for the mark FOCUSED

PATIENT CARE covering computer hardware and computer software. SXG's '048

Australian registration was filed on November 13, 2013.

9. On December 13, 2013, SXG filed United States trademark application number 86143360

for the mark FOCUSED PATIENT CARE. The '360 application as filed covered

computer hardware and computer software. The '360 application was amended during

prosecution and the description of goods as amended covers "Computer hardware;

Computer software for use in hospitals".

10. SXG filed the '360 application for the mark FOCUSED PATIENT CARE because SXG

maintains an intent to expand its geographic footprint to include selling goods and services

under the trademark FOCUSED PATIENT CARE in the United States. A representative

sample of promotional material which has been promulgated in the United States and

Australia is attached at Exhibit A.

11. Consistent with SXG's uses in Australia, the mark FOCUSED PATIENT CARE, is

intended for use in the United States for a system comprised of computer hardware and

software for use in hospitals and elder care facilities namely, computer hardware and

software for use in connection with an integrated workflow facilitation platform that

enhances patient care, patient flow, and care of the elderly. Hereinafter the FOCUSED

PATIENT CARE system comprising both hardware and software is referred to as the FPC

system.

12. The FPC system includes not only computer hardware and software but the customization

and configuration of the system to meet a particular hospital or elder care facility needs,

installation services, ongoing repair, and support services.

13. The FPC system includes functionality including but not limited to customizable electronic

patient charting/journey boards, integrating nurse call systems, access to entering data in

electronic medical records, staff allocation, work flow and discharge planning, accessing

medical imaging systems, and coordinating and ordering patient drug prescriptions with

pharmacy systems. Functionality can also include hospital wide communications, patient

management and bedside entertainment systems, and equipment tracking systems.

14. When SXG presents the FPC system to potential hospital customers, the sales presentation

and meeting are typically coordinated with high level and experienced hospital

administrators, professional clinicians, chief of staff medical doctors, nursing supervisors.

and the information technology support teams at the hospital. Several meetings are

required with different departments of the hospital. These hospital professionals carefully

vet the FPC system and vet SXG because the FPC system must work with certainty,

reliability and the utmost of precision considering the care required for hospital patients

and perilous risks associated with malpractice in a medical care facility and medical patient

treatments. Further, the high costs of the FPC system require formal contracts and scrutiny

by hospital financial professionals.

15. The level of vetting and buyer scrutiny from the initial contact with a potential customer

towards finalizing a contractual agreement to move ahead with installing an FPC system

takes a minimum amount of time of about six months. During the initial months the parties

go through extensive consulting and communications between the SXG's software and

hardware engineers and the IT professionals, medical staff, and administrators of the

hospitals to determine particular needs which is dependent on the size of the hospital or

elder facility and particular care provided.

16. Once contracted, the process to complete initial installations, running beta tests of the

platforms and various systems, training, and ultimately launching the FPC system, can take

upwards of two to three years.

17. The cost of the FPC system reflects the immense time and hard costs associated with the

product.

18. The average cost of an FPC system including ongoing yearly support and maintenance as

required ranges from about AU \$300,000 to AU \$500,000

19. The FPC system intended for use in the United States is the same system as sold in

Australia. The amount of time in the vetting, buying and installation and the launching

process for the FPC system for sales in the United States will be the same extensive time

as experienced in Australia. The anticipated costs will be of like kind, averaging up to one

half million dollars per year.

20. In 2014, Opposer Information Builders, Inc., (IB) filed an opposition against SXG's

pending Australian application.

21. During the Australian Opposition, IB's principal Gerald Cohen submitted a sworn

declaration in support of IB's position. Attached at Exhibit B is Gerald Cohen's Australian

Declaration (Cohen AU Dec)

22. In his Australian Declaration Mr. Cohen asserted that IB has had a significant presence in

Australia allegedly making "widespread and extensive use of its FOCUS and WEBFOCUS

trademarks in Australia for more than 32 years". Cohen AU Dec at ¶ 32.

23. Mr. Cohen also asserted in his Australian Declaration that IB had in excess of 50 million

dollars of sales in Australia between 1992 and 2013. Cohen AU Dec at ¶ 36.

24. Mr. Cohen also asserted in his Australian Declaration that IB had spent in excess of a

million dollars in advertising IB's FOCUS and WEBFOCUS marks during the time period

of 2001-2013. Cohen AU Dec at ¶ 37.

25. IB currently maintains a dedicated Australian web site where it promotes its products and

services to Australian hospitals such as St. Luke's University Health Network (St Luke's).

I reviewed the promotional material appearing on the IB Australian web site and a true

copy of that material is attached at Exhibit C.

26. IB provides software which functions to support data management and data analytics for

accessing information to improve operational processes. The field of use of IB's offerings

is for data analytics and business intelligence.

27. As described in IB's promotional material, just for the planning stages in the case of St.

Luke's hospital and health care system, it took more than 40 stakeholders to outline the

needs and priorities of the hospital from a business intelligence perspective.

28. I reviewed the promotional material submitted with IB's notice of reliance comprising IB's

Exhibit P-11, P-12, and P-13. These customer profile promotional documents confirm that

IB's WEBFOCUS software is used for business intelligence data analytics platforms and

the software is used by informatics analysts. The IB product creates a data warehouse for

analysis purposes. Based on my review of the IB promotional material it is obvious that

the IB product does not manage patient care as these terms are commonly used to refer to

the daily management of medical patients in a hospital setting.

29. I am familiar with the terms "business intelligence" and "the field of data analytics".

Software programs in the field of data management and data analytics refer to software

which can be used to run analytical reports based on collecting data from multiple sources.

Data is collected from past activity and analyzed for possible operational changes and

improvements.

30. SXG's FPC system is not designed for use by professionals in the field of data analytics.

The FPC system is designed for use by nurses and doctors for managing the day to day

care of medical or elderly patients.

31. SXG's FPC system has been installed and operated in over 50 hospitals in Australia dating

back to 2002.

32. For more than 17 years SXG's FPC system has been coexisting with IB in Australia in the

broadly described field of software. To the present day I am unaware of even a single

mention by any person being confused that SXG's FPC system for hospital patient care is

in any way associated with IB or IB's data management and data analytic software

products. Further, I am unaware of any person ever mentioning anything to do with IB but

for the formal trademark proceedings initiated by IB in Australia and the United States.

33. When IB filed an opposition in Australia attempting to prevent SXG from registering the

mark FOCUSED PATIENT CARE, the Australian Trademark Office dismissed the IB

opposition concluding on the merits that there was no likelihood of confusion between

IB's FOCUS and WEBFOCUS trademarks and SXG's FOCUSED PATIENT CARE

mark. A copy of the Australian Trademark Office decision as maintained in within the

office records of SXG is attached at Exhibit D.

I declare under penalty of perjury under the laws of the United States of America that the foregoing

statements above are true and correct.

Declaration of Steve Mike Gomes

Legal/69462600 5

Steve Mike Gomes

Date: August 12, 2019









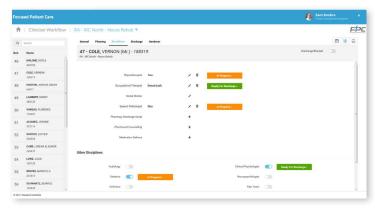


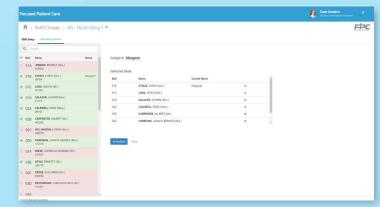
#### **Journey Board**

- Boards can be configured to suit the need of individual wards and/or departments
- Board templates can be created for ease of implementation and standardisation across wards
- Simple click to switch to different boards
- Quick access to patient demographics from the Journey Board
- Clean and intuitive design that provides very clear visibility on discharge blockers

#### Workflow Tool

- · Smart search option to locate patients quickly
- Collect and group information from other systems logically to improve navigation
- Simple and modern interface allows navigating and updating information effortless
- Responsive design enables use on mobile devices such as tablets





#### Staff Allocation

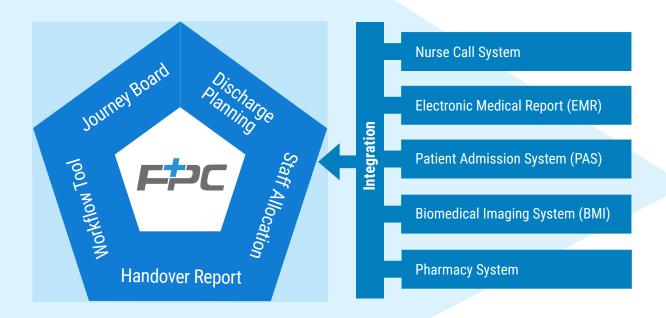
- Specially designed tool to allocate staff during shift change
- Seamless integration with Staff Allocation in Rauland Responder 5 or other supported workflow systems
- Customisable to integrate with rostering systems

## **Handover Report**

- Integrated clinical and nursing handover tool
- Automatically generate and print handover reports for all or selected patients
- Customisable handover report templates
- Includes bedside handover tool for a paper-less handover process



# **Focused Patient Care Integration**



Rauland YEARS enriching the healthcare experience

1300 142 142 www.rauland.com.au sales@rauland.com.au 514 Miller Street, Cammeray, NSW 2062 40 Straker Street, North Melbourne VIC 3051 249 Boundary Street, West End QLD 4101 301 Onslow Road, Shenton Park WA 6008 5 Farnham Street, Parnell, Auckland 1052 (+61) 02 9908 1777 (+61) 03 9328 5811 (+61) 07 3846 0155 (+61) 08 6282 2000 (+64) 9 308 6555





enriching the healthcare experience



SXG INVESTMENTS PRODUCTION - 0037

### **Product Verticals**





R4K, R5,RCP, FPC, NCEDA, Clock, VNC, Dementia

Patient Entertainment System



HiMed Cockpit, IPS, Content

Healthcare Informatics



FPC, Journey Board, PIT, RTLS

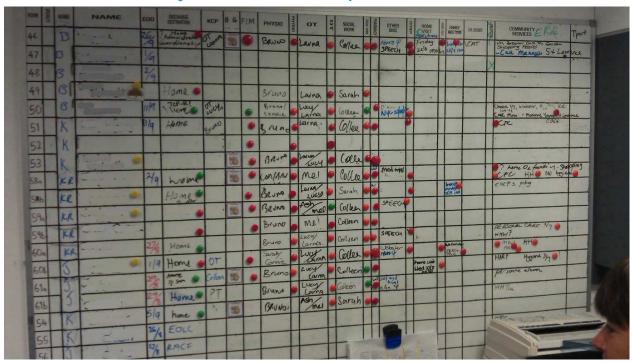
Messaging





DAKS

## Journey Board – Snapshot vs Workflow



## Journey Board – Snapshot vs Workflow



## Problems with Physical White Board

- Manual
- No Data Integrity Check
- Staff need line-of-sight to read the information
- Privacy/Confidential information is on display
- No backup, retrieval, or audit trail
- Physical whiteboard is a 'magnet' for germs given the frequent touch of multiple stakeholders
- Physical whiteboard cannot be disinfected without wiping all information blank
- Requires a visit to the board. Discipline. Not a true-reflection of work completed
- Little, if any, decision support can be applied

# Why?

- Smart decentralised tools are highly supportive of patient centred care
- Uses information from single source of truth
- Improve patient flow through real time information
- Efficiently coordinate the patient journey from pre-admission through to discharge, leveraging and evolving the hospital communication platform, with notifications, follow-up and escalations workflows

# DEMO Time

Rauland enriching the healthcare experience

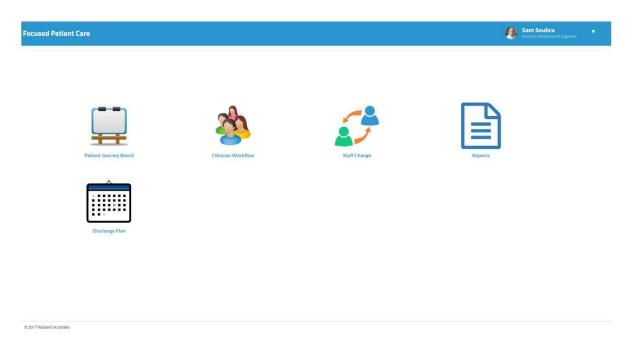
# Log-in

 Full integration with hospital Access and Identity Management directory, to reduce administrative overhead (including Microsoft Active Directory via LDAP)



## Home Screen

Intuitive 'iconised' Home Screen for easy access to all available modules and tools



## **Journey Board**

- Boards can be configured to suit the need of individual wards
- Board templates can be created for ease of implementation and standardisation across wards
- Simple click and switch to different boards
- Quick access to patient demographics from the journey board





# **Journey Board**

- Admission board consolidated from multiple wards
- Bed Clerks and Access Managers have visibilit across all beds, including potential barriers to pending discharges

								Planned Discharge	
18A	HALLOWAY, HIVA (Mrs.)		Dr R Jones	16/12	2		Home		
188	MAXWELL, TRACEY MEGHAN (Mrs.)	0.00/3	Dr X Ng	15/11	33	25/12	Home		
194	HAMPTON, DONNA (Mrs.)		Dr J Drake	26/11	22	26/12	Home with services		
198	RILEY, KRISTY (Mrs.)		Dr R Jones	29/11	19	31/12	Home/TCP D		
204	PARK, HARVEY (Mr.)		Or J Drake	16/12	2		Hame		
208	PALMER, CHESTER (Mr.)		Dr X Ng	06/12	12	01/01	Frome with wife		
21A	HOLLAND, HANNAH FRANCIS (Mrs.)		Dr.R.Jones	26/11	22	20/12	Home with services		
218	BECKER, MONA (Ms.)		Dr J Drake	18/11	30	18/12	Home		
22A	HINES, SHARI (Mrs.)		Dr.R.Jones	03/12	15	2A/12	Home		
228	GILBERT, LAURIE (Mo.)		Dr.R.Jones	11/12	7.	28/12	Home		
23	MYERS, JANA (Ms.)		Dr.E. Lambert	18/11	30	26/12	Home w 7TCP-D		
24	HOLT, MIRANDA ISABEL (Mrs.)		Dr X Ng	04/12	14	24/12	7 home vs LTC		
25	PAGE, CAMILLE (Mrs.)		Dr E Lambert	07/12	11	27/12	Home		
26	SANDOVAL, NICHOLAS (Mr.)		Dr X Ng	06/12	12	20/12	Home		
27A	MARTIN, SHANNON (Ms.)		Dr X Ng	20/11	28	25/12	TOPHIS es LTD		Niece - Leanne die
278	MOORE, GUADALUPE (Mrs.)		Dr E Lambert	27/11	21	24/12	Home w Insti		
28A	DRAKE RODERICK (Mr.)		Dr E Lambert	14/11	34	25/12	Home with wife		
288	DOYLE, ERNESTO (Mr.)		Dr X Ng	09/12	9	02/01	Home with wife		
29A	CARTER, BRENDA (Mrs.)		Dr E Lambert	20/11	28	18/12	Home		Daughter Alison
298	COX, KARA (Me.)		Dr X Ng	03/12	15	02/01	Thome & TCP-HB		
30	GROSS, TRAVIS (Mr.)		Dr.E Lambert	06/12	12	20/12	Home		
01	A AAADEST CAITU (AA)	Partital	- Or Edward -	1245		42(0)			

# **Journey Board**

 Theatre board shows both the current patient in surgery and also queued patients for each theatre



# **Journey Board**

Pharmacy board shows patients with a discharge script pending

03	MCKSW	Amy	BALLARD, DEAN (Mr.)	Or D Ramoe	MT Reh	28/07		•
108	HW7	Margaret	GREEN, WILLIS (Mr.)	Dr J Taytor	Resp	30/07		•
27	GVC	Robert	HOGAN, MATTHEW (Mr.)	Dr J Taylor	Resp	30/07		
17	BAXS		MCCOV, TED (Mr.)	Dr J Tirylor	Resp	30/07		•
100	HW6		SANDOVAL, LESUE (Mr.)	Dr J Taylor	Resp	30/07		
01	BAX5		HAWKINS, DENISE BROOKE (Mrs.)	Aprof D Rophins	Gen Med 1	01/08	· ·	

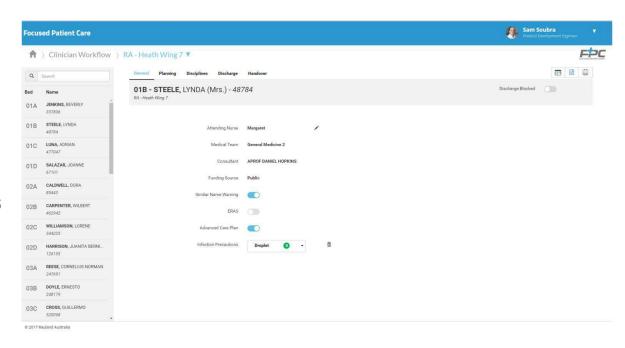






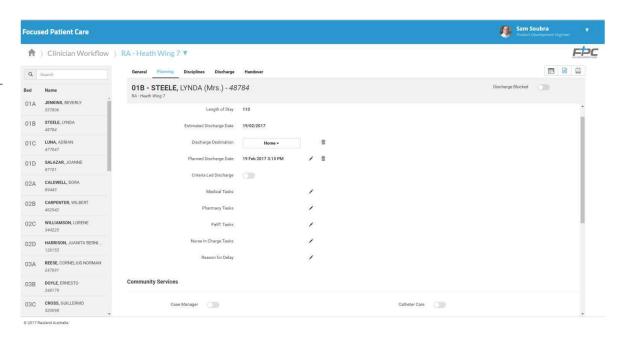
## **Workflow Tool**

- Simple and logical grouping for easy navigation
- Smart Search with automatic filtering based on name, bed number or UR
- Information is consolidated from PAS and EMR



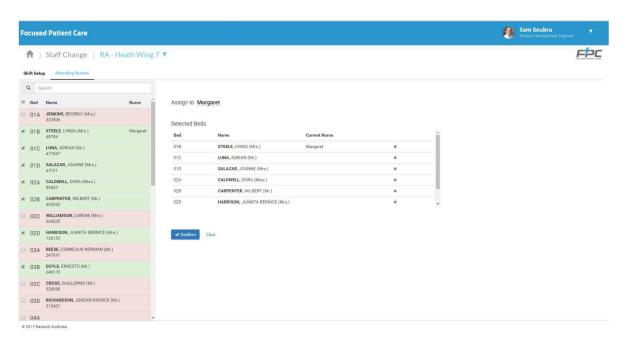
## **Workflow Tool**

- Information can be customised for each ward
- Ability to reduce clutter by hiding information not related to the ward



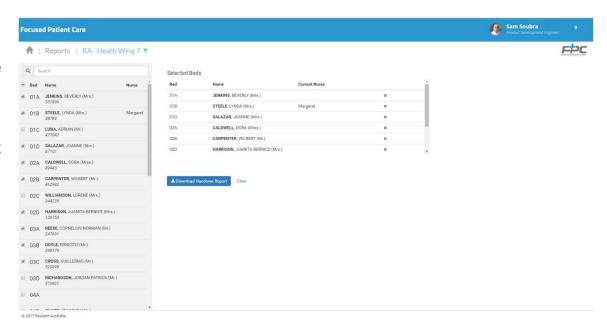
## Staff Allocation

- Tool to allocate staff at shift change
- Seamless integration with Staff Allocation in Rauland Responder 5
- Customisable to integrate with rostering system [OPTIONAL]



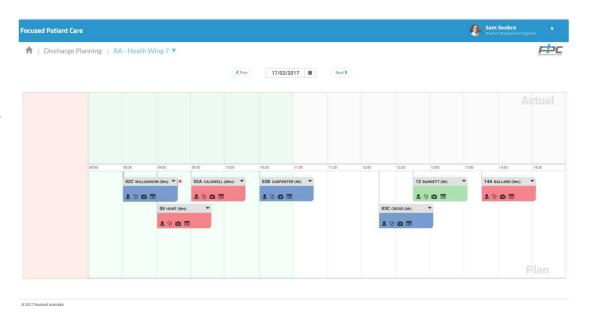
## Handover Report

- Integrated clinical and nursing handover tool
- Automatically generate and print handover reports
- Customisable handover report format
- Includes bedside handover tool



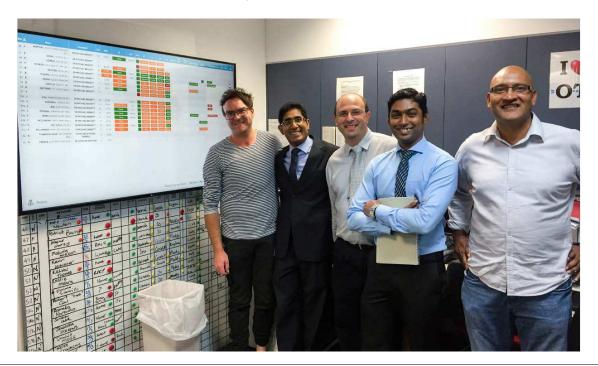
## **Discharge Planning Tool**

- Manage multiple discharges per day using a visual planner
- Track the efficiency of discharge process by measuring how closely the process went against the plan
- Ability to plan the discharge well in advance, allowing visibility and mitigation of barriers



### **Gomes Declaration - 0032**

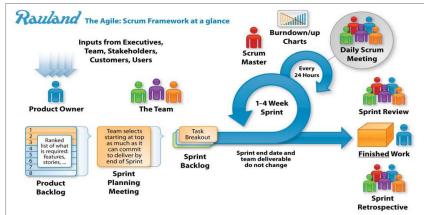
## Journey Board – Barwon



### **Gomes Declaration - 0033**

### Journey Board - Agile

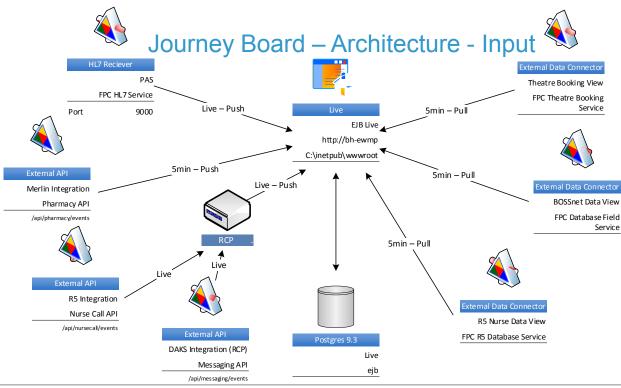




### Journey Board - Collaboration

- High level workshops
  - Generate Epic Stories
- Prioritize Epics
- Break Epic Stories down into smaller more manageable User Stories
- Estimate User Stories and Technical Stories
- Allocate Stories to a Sprint
- Team commits to delivering all Stories of a Sprint
- Delivery, Showcase, Retrospective

### **Gomes Declaration - 0035**



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#### Journey Board – Architecture - Output Live EJB Live External API Graylog http://bh-ewmp Pulse Integration GELF HTTP C:\inetpub\wwwroot Monitor API http://18.88.118.86 /api/mo nito r/s tatus Post Get External API Get PES Integration PES API /api/pes/plan External API PIT Integration PIT API /api/pit/details External API DAKS Integration (RCP) Postgres 9.3 Messaging API Live /api/mes saging/events ejb

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### **Gomes Declaration - 0037**

## Journey Board – My Care Plan



### **Gomes Declaration - 0038**





SXG INVESTMENTS PRODUCTION - 0061

Exhibit B

### AUSTRALIA

#### **TRADE MARKS ACT 1995**

IN THE MATTER OF trade mark application no. 1591048 FOCUSED PATIENT CARE in class 9 in the name of SXG Investments Pty Limited - and - Opposition by Information Builders, Inc.

#### STATUTORY DECLARATION

- I, **GERALD DAVID COHEN**, of 2 Penn Plaza, New York, NY 10121-2898, United States of America, make the following declaration under the Statutory Declarations Act 1959:
  - I am the President and Chief Operating Officer of Information Builders, Inc. of 2 Penn Plaza, New York, NY 10121-2898, United States of America (the Opponent). I have held my current position since 1975, the year in which the Opponent was founded. I am a co-founder of the Opponent.
  - 2. I am involved in all aspects of the Opponent's business, including overseeing its trade mark matters. I have first-hand knowledge of the Opponent's trade marks and of the manner in which the Opponent uses its trade marks internationally. I am authorised to depose to this declaration and to provide evidence on behalf of the Opponent in these proceedings.
  - 3. The facts set out in this declaration are within my personal knowledge, unless otherwise stated and are true and correct.
  - 4. Certain of the facts set out in this declaration have been extracted from the properly kept continuous records of the Opponent, which are maintained under my direct supervision and control. Save to the extent that specific reference is made to these records in this declaration, they are not relevant to these proceedings.

### **THE PARTIES**

- 5. The Opponent is Information Builders, Inc., a company organised and existing under the laws of the state of New York, having its principal place of business at 2 Penn Plaza, New York, NY 10121-2898, United States of America.
- 6. The Applicant is SXG Investments Pty Limited (the **Applicant**).

#### **OPPOSITION**

7. This opposition concerns the following trade mark application filed by the Applicant in Australia:

Trade mark:	FOCUSED PATIENT CARE
Application number:	1591048
Filing Date:	13 November 2013
Class 9 goods:	Computer hardware; Computer software

# BACKGROUND TO THE OPPONENT'S ADOPTION, REGISTRATION AND USE OF THE TRADE MARKS FOCUS AND WEBFOCUS

- 8. The Opponent's first registration for its FOCUS trade mark in the United States of America dates back to 30 July 1991, when it registered the mark under registration no. 1,652,256 in class 9.
- 9. The Opponent's FOCUS and WEBFOCUS trade marks are registered in many countries across the world. A schedule setting out details of the Opponent's worldwide registrations for its FOCUS and WEBFOCUS trade marks is now shown to me and marked Exhibit GC 1.
- 10. The Opponent commenced use of its FOCUS trade mark in respect of computer software in the United States of America in 1975, when companies, known as "service bureaus", purchased the Opponent's computer software products bearing the trade mark FOCUS (the Opponent's FOCUS software). These service bureaus then installed the Opponent's FOCUS software on their mainframe computers and, in turn, sold time on those mainframe computers to customers who accessed the software by means of their own computer terminals.
- 11. The Opponent began selling its FOCUS software directly to the public in the late 1970's or early 1980's. The Opponent's FOCUS software has been used for over thirty years by thousands of the world's leading corporations, institutions, and government agencies. The Opponent's FOCUS software has been used by more than a million users working on virtually every computer platform, from mainframe to PC. The Opponent's FOCUS software has been used for the following purposes:
  - a. computer software for database management;
  - b. computer software for use in decision support systems;
  - computer software for use in enterprise reporting and analysis systems and for building applications for the management and tracking of data for enterprise reporting systems;
  - d. computer database programs for use in connection with decision support,

- analysis and reporting programs;
- e. computer software development tools for use in developing decision support, analysis, and reporting systems and applications;
- f. computer software, namely client/server reporting, analysis and decision report tools;
- g. computerised database, reporting and analysis software for use on corporate intranet websites;
- h. enterprise server software for use in web-based data publishing, reporting and analysis solutions;
- computer software for accessing databases by means of global computer networks to generate reports;
- j. software development tools for making reporting and analysis available through global computer network worldwide websites and for extending the functionality of enterprise reporting and analysis systems on to global computer networks; and
- k. computer software for accessing and updating databases through global computer networks.
- 12. Over the past 30 years the Opponent has continually strived to improve its FOCUS software. Many of the original FOCUS applications are still in place and have simply been redeployed on new, more efficient operating platforms or re-engineered to be compatible with the latest graphic user interface front-end tools.
- 13. The target market for the Opponent's FOCUS software is any organisation that has the need to analyse data and make it available to decision makers. Service organisations such as insurance companies, energy companies and banks, use the Opponent's FOCUS software to monitor and analyse sales or to learn more about customers and their needs. Manufacturers use the Opponent's FOCUS software to monitor assembly lines and inventories. Governments use the software to manage budgets, distribute census information or track expenditures. There are hundreds of thousands of computer software applications written using the Opponent's FOCUS software.
- 14. The Opponent commenced use of its trade mark WEBFOCUS in 1996. The trade mark WEBFOCUS is used in relation to a software product (the **Opponent's WEBFOCUS software**) that builds upon the Opponent's FOCUS software.
- 15. The Opponent's WEBFOCUS software is compatible with the Opponent's older FOCUS software. Therefore, FOCUS software users are easily able to integrate the Opponent's WEBFOCUS software on their systems. Unless specifically stated otherwise, or unless the context otherwise indicates, references in this declaration to the Opponent's FOCUS software include the Opponent's WEBFOCUS software.

- 16. The Opponent has made widespread and extensive use of its FOCUS trade mark worldwide since 1975 and its sales have grown substantially since then. The Opponent has become one of the largest independent software companies in the world and is a world leader in business intelligence solutions. The Opponent is currently represented in over 40 countries across the world and has in excess of 11,000 global customers. It also has more than 350 business partners worldwide. The Opponent normally has in the region of 1500 employees at any given time and currently achieves in excess of U\$300 million in annual revenue.
- 17. Apart from the Opponent's representatives or agents across the world, the Opponent also has more than 46 offices worldwide. These offices are located in many countries around the world including, but not limited to Australia, Brazil, Canada, France, Germany, The Netherlands, Portugal, Spain, Switzerland, United Kingdom and the United States of America. A list of the Opponent's worldwide offices is now shown to me and marked Exhibit GC 2. Over the last 25 years the Opponent has installed products in over 75 countries.
- 18. The Opponent has established marketing and consulting partnerships with more than 50 of the world's leading hardware, software, database, networking and application software developers. Among these partners are numerous multinational computer and media companies such as IBM, UNISYS, SAP and Oracle. As a result of the Opponent's extensive use of its FOCUS trade mark for more than 3 decades, combined with the Opponent's business partnerships and alliances, the Opponent's FOCUS trade mark has become well known in the information technology industry and, more broadly, in the global business environment.
- 19. The Opponent has supplied and installed about 50,000 server licenses of FOCUS and WEBFOCUS software, including PC and Microsoft Windows operating system FOCUS and WEBFOCUS software throughout the world. Specifically, outside of the United States of America, the Opponent has sold over 2,600 server licenses of mainframe FOCUS software and 4,000 server licenses of mid-range FOCUS software since 1985. Furthermore, the Opponent has sold over 3,300 server licenses of WEBFOCUS software outside of the United States of America since 1996.
- 20. The Opponent has approximately 375 FOCUS and WEBFOCUS software products, each of which conspicuously displays its trade marks FOCUS or WEBFOCUS on the product or the packaging of the product. A summary list of the Opponent's FOCUS and WEBFOCUS software products is now shown to me and marked Exhibit GC 3.

- 21. The Opponent's FOCUS and WEBFOCUS software products currently account for 63% of the Opponent's total worldwide revenue.
- 22. The Opponent's FOCUS and WEBFOCUS software products are used by two-thirds of the US Fortune 500 companies, while 92 of the Fortune 100 companies have used the Opponent's FOCUS or WEBFOCUS software.
- 23. The Opponent provides a full range of education, consultancy and support services worldwide, with a number of regularly published technical and product newsletters, including the online WEBFOCUS Newsletter and a company magazine entitled Information Builders Magazine. Back issues of the Opponent's WEBFOCUS Newsletters from February 2003 are available on its website located at www.informationbuilders.com. A list of the Opponent's WEBFOCUS Newsletters, which are available on its website, is annexed, marked Exhibit"GDC9". Back issues of the Opponent's Information Builders Magazine from 1999 are also available on its website located at www.informationbuilders.com. A list of the Opponent's Information Builders Magazines, which are available on its website, is now shown to me and marked Exhibit GC 4.
- 24. As mentioned above, the sales of the Opponent's FOCUS software products have grown significantly since the Opponent's formation in 1975. To illustrate the Opponent's extensive sales, I set out below the Opponent's global sales figures since 1990:

Year	Sales Revenue (US\$) million
1990	191
1991	202
1992	225
1993	227
1994	243
1995	254
1996	263
1997	287
1998	310
1999	337
2000	300
2001	290
2002	287
2003	285
2004	288
2005	290
2006	300
2007	310
2008	307
2009	272

2010	296
2011	281
2012	297
2013	299

25. Since the Opponent commenced use of its trade mark FOCUS in 1975, it has committed a significant amount of its resources to the promotion and marketing of its FOCUS software throughout the world. The Opponent's relevant approximate advertising expenditure, for the years 1991 to 2008, is set out below:

Year	Approximate Advertising
	Expenditure (US\$) Million
1991	2.446
1992	2.674
1993	2.865
1994	2.657
1995	3.178
1996	3.741
1997	4.260
1998	4.650
1999	5.100
2000	5.500
2001	6.700
2002	7.000
2003	7.300
2004	5.500
2005	5.500
2006	5.200
2007	5.500
2008	7.000
2009	5.000
2010	5.400
2011	5.600
2012	6.000
2013	6.000

- 26. The Opponent participates annually in about 25 trade shows in the United States of America and 10 throughout the rest of the world. In addition, since 1985, an annual users summit conference has been held by the Opponent in the United States, where users learn of the full capabilities of the Opponent's FOCUS software. On average, currently 1000 users from all over the world, including Australia, attend the summit every year. Details of the summit for the years 2003, 2008, 2009, 2010, 2011, 2012 and 2013 are now shown to me and marked Exhibit GC 5.
- 27. The Opponent participates in the Gartner Business Intelligence & Information Management

Summit in Australia each year as an exhibitor, sponsor and as speakers. This Summit is one of the largest trade shows in Australia for business intelligence and information management related products and services.

- 28. In addition to the use of the Opponent's FOCUS and WEBFOCUS trade marks in relation to its software products and on its published material, the Opponent makes use of its FOCUS and WEBFOCUS trade marks on its primary website situated at information builders.com. The website was launched in 1995. A selection of screenshots from the website is now shown to me and marked Exhibit GC 6.
- 29. There are various press releases by the Opponent as well as articles pre-dating the filing date of the Applicant's trade mark application, which have made reference to the Opponent's FOCUS and WEBFOCUS trade marks. These press releases have been distributed in Australia. A selection of these are detailed below. Copies of these are now shown to me and marked Exhibit GC 7
  - a. White paper entitled "Best Practices in Information Delivery, A Roadmap for Implementing Business Intelligence Solutions", which according to the copyright notice was created in 2002.
  - b. an article entitled "Information Builders Honors Five Customers for Outstanding Use of Technology" dated on 5 May 2005.
  - c. an article entitled "Donatos Pizza Finds an Appetite for Operational Business Intelligence", published on 23 November 2005, available on the Opponent's website at www.informationbuilders.com.
  - d. an article entitled "Information Builders Continues to Be a Hot Item for the Retail Industry", published on 14 December 2005, available on the Opponent's website at www.informationbuilders.com.
  - e. an article entitled "Computerworld Honors Program Honors Seven Information Builders Customers' Applications for Valuable Contribution to Society" dated 6 June 2006.
  - f. an article entitled "Information Builders transforms operational business intelligence with the launch of WEBFOCUS 7", dated 7 July 2005 available at DSSRecources.com.
  - g. An article entitled "Information Builders transforms operational business intelligence with the launch of WEBFOCUS 7" dated 30 July 2008 available at DSSRecources.com
  - h. An article entitled "PRISM Group Soars With Information Builders' WebFOCUS Business Intelligence Technology dated 08 December 2009
  - i. An article entitled "Information Builders' Customers Achieve Rapid ROI Using WebFOCUS and iWay Software" dated 8 June 2010
  - j. An article entitled "Information Builders Ranks High in KLAS Business Intelligence Report" dated 21 November 2011
  - k. An article entitled "Information Builders Customers Win Computerworld "Best in Class" BI Awards" dated 29 August 2012
  - An article entitled "WebFOCUS Cloud Express Provides UK Public Sector With Cost-Efficient Business Intelligence" dated 17 June 2013

THE OPPONENT'S REGISTRATION AND USE OF ITS FOCUS AND WEBFOCUS TRADE MARKS IN AUSTRALIA

30. The Opponent is the proprietor of the following Australian trade mark registrations:

Trade mark No. 371785 Trade mark FOCUS

Owner Information Builders Inc.

Regn date 18-FEB-1982

Services Class: 42 The provision of a computer program for preparing reports

from computerized files and the maintenance of the information in the

files

Trade mark No. 566062 Trade mark FOCUS

Owner Information Builders Inc.

Regn date 28-OCT-1991

Goods Class: 9 Computer software, including computer programs

Trade mark No. 787138
Trade mark WEBFOCUS

Owner Information Builders Inc.

Regn date 02-MAR-1999

Goods Class: 9 Computer software

- 31. The Opponent's FOCUS and WEBFOCUS trade marks have been used by the Opponent in Australia since 1982. The Opponent's trade marks were used under licence by the following Australian representatives: The Opponent operates the following physical offices in Australia:
  - Information Builders Australia, Level 3, 84 Pitt Street, Sydney NSW 2000
  - Information Builders Australia, Level 3, 350 Collins Street, Melbourne, VIC 3000
- 32. The Opponent has made widespread and extensive use of its FOCUS and WEBFOCUS trade marks in Australia for more than 32 years. As a result, the Opponent has acquired a substantial reputation and goodwill in its trade marks FOCUS and WEBFOCUS in Australia.
- 33. A selection of the Opponent's press releases relating to Australia are now shown to me and marked Exhibit GC 8.
- 34. Several large and very well-known businesses in Australia use the Opponent's FOCUS and WEBFOCUS software products. Some of the most well-known entities or businesses included in Opponent's client base, and which have used or continue to use the Opponent's software products, are:

ACC WORKCARE
AIR SAFETY BUREAU
ALLIED PICKFORDS
AMCOR BUSINESS SVCS
ANL LIMITED
ANZ BANK
AUSTRALIA DEPT OF HEALTH
AUSTRALIAN STEVEDORES
AUSTRALIAN STEVEDORES
BARCLAYS BANK
BP AUSTRALIA
CITICORP CAPITAL MARKETS
CLIFFS ROBE RIVER
COLES MYER LIMITED
COMMONWEALTH BANK
COMMONWEALTH IND. GASES
COMPRACC PTY LTD
D.P.I.R. (4360)
DAVID REID ELECTRONICS
DEPT ENVNMENT & NAT RES
DEPT PRIMARY INDUSTRIES
DILGEA
DPT OF EMPLOYMENT & TAFE
ELDERS PASTORAL
ELECTRICITY TRUST OF SA
ELI LILLY AUSTRALIA
EMPHASIS CORPORATION
EVERGREEN MARINE CORP
FIRST STATE COMPUTING
GATTORNA CHORN BUS. STRA
HINDMARSH ADELAIDE BLDG
INDUSTRY ASSISTANCE COMM
LEGAL AID COMM VICTORIA
METWAY (METROPLTN PBS)
MLC/NAT'L AUSTRALIA BANK
MOBIL OIL AUSTRALIA
N TERR POWER & WATER AUTHOR
NATIONAL FOOD AUTHORITY
NATIONAL MUTUAL
NFC HOME SVCS DIV.
NRMA DATA PROCESSING
NSW GOVT/DEPT OF HEALTH
OFFICE OF LEGAL AID
OPTUS COMMUNICATIONS
PEPSI SEVEN-UP BOTTLERS
PHILIP MORRIS INFO SVCS
PIPELINES AUTH/TENNECO
QANTAS AIRWAYS LTD.
QUEENSLAND IND. WHLSLRS
REPCO INFORMATION SVCS
ILLI CO IIVI ONIVIATION 3VC3

S AUSTRALIAN MIN PUBLIC SECTOR
SEAROAD HOLDINGS PTY LTD
SHELL AUSTRALIA
ST GEORGE BANK
STATE ELECTRICITY COMMISSION.
STATE SUPERANNUATION BD.
T.N.T.
TELSTRA INFO SYSTEMS
TOLL HOLDINGS LTD
VODAFONE AUSTRALIA
WESTPAC BANK
YELLOW PAGES AUSTRALIA
ZURIC INSURANCE

- 35. The Opponent is a very well-known and respected provider of software products in Australia. In light of the above, it will be clear that the Opponent has made and continues to make widespread and extensive use of its trade marks FOCUS and WEBFOCUS in Australia and that it has acquired a substantial reputation and goodwill in its trade marks.
- 36. In order to illustrate the Opponent's use of its trade marks FOCUS and WEBFOCUS in Australia, details of the Opponent's sales figures for Australia are tabulated below:

Year	Approx. Sales Figures (US\$)
1992	2,586,322
1993	2,118,196
1994	2,634,416
1995	3,692,217
1996	3,942,691
1997	2,712,580
1998	2,901,650
1999	2,740,391
2000	3,184,164
2001	2,560,410
2002	2,111,209
2003	2,076,426
2004	2,775,603
2005	2,332,150
2006	2,678,257
2007	2,167,699
2008	2,956,032
2009	2,157,708
2010	2,303,635
2011	2,543,046
2012	1,823,903
2013	2,036,619

37. A substantial amount of money is spent on the marketing and promotion of the Opponent's FOCUS and WEBFOCUS software in Australia. In this regard, the Opponent's current

Australian representatives have spent the following amounts on the promotion of, inter alia, the Opponent's FOCUS and WEBFOCUS software products:

Marketing Costs (A\$)	
2001	152,000
2002	149,000
2003	105,000
2004	128,000
2005	302,000
2006	41,000
2007	115,000
2008	107,000
2009	61,000
2010	122,000
2011	118,000
2012	103,000
2013	68,000

I am advised that most marketing exercises relate not only to the Opponent's FOCUS and WEBFOCUS software products, but also include its iWAY product. Accordingly, I am advised that it is not possible to specify the exact proportion of the expenditure that relates to the FOCUS and WEBFOCUS software.

- 38. As a result of the Opponent's extensive sales and promotional activities in Australia, coupled with the knowledge of its trade marks in Australia through publicity, the Opponent's FOCUS and WEBFOCUS trade marks have acquired a protectable reputation and have become well-known in Australia.
- 39. The dominant, distinctive and memorable portion of the marks that form the subject of the offending application is the word FOCUS.
- 40. The words PATIENT CARE are descriptive of the purpose of the goods and therefore cannot serve to distinguish the trade mark FOCUSED PATIENT CARE from the Opponent's FOCUS and WEBFOCUS trade marks. The Opponent's FOCUS trade mark is wholly incorporated in the trade mark FOCUSED PATIENT CARE. The prefix WEB in the Opponent's WEBFOCUS trade mark is descriptive. The word FOCUS is therefore the dominant element of its WEBFOCUS trade mark. As a result of the fact that the word FOCUS forms the dominant portion of FOCUSED PATIENT CARE trade mark, the FOCUSED PATIENT CARE trade mark is visually, phonetically and conceptually confusingly and/or deceptively similar to the Opponent's FOCUS and WEBFOCUS trade marks.
- 41. The Opponent is very concerned that use of the trade mark FOCUSED PATIENT CARE by the

Applicant in relation to the applied for goods, would give rise to a risk of confusion or deception in connection with the Opponent's FOCUS and WEBFOCUS branded products.

AND I MAKE this solemn Declaration conscientiously believing the same to be true in every particular.

Declared at New York, United States of America

this 2 32d day of October 2014

Before me:

**GERALD DAVID COHEN** 

**Notary Public** 

LAUREN I CULLEN
NOTARY PUBLIC-STATE OF NEW YORK
NO. DI CU6268729
Qualified in New York County
My Commission Expires September 17, 2016



**Our Services** 

**Worldwide Sites** 

Contact Us(/en-au/contact-us)

**Partner** 

Learn

Q

**Get Started** 

**OUR CUSTOMERS** St. Luke's University Exhibit C Health Network A non-profit, regional, fully integrated, and nationally recognized network providing services at seven hospitals and more than 270 outpatient sites.

# The Challenge

St. Luke's University Health Network Dri...



X Diverse sources of data made it difficult to obtain a single, consolidated view of critical information in support of clinical, financial, and operational analysis.



# The Strategy

St. Luke's created an enterprise health data warehouse with a single view of key business entities to support analytical applications that allow stakeholders to gain insights across all mastered data domains and covers the full continuum of patient care.

Dan Foltz Program Manager, EDW and Analytics Implementation "Information Builders enabled us to quickly build and deploy an environment that leverages \* data to boost performance, capture revenue, reduce costs,



and compete more effectively with other regional health networks."

## The Outcome

The new technology platform has enabled St. Luke's stakeholders to access a single source of trusted information that is truly actionable and drives improvements in operational processes.

Read the Case Study (https://www.informationbuilders.com/sites/default/files/2018-07/cs st lukes univ health webfocus.pdf)

Also of Interest

<u>Data Management Platform (https://www.informationbuilders.com/en-au/products/data-management-platform)</u>

<u>BI Analytics Platform (https://www.informationbuilders.com/en-au/products/bi-and-analytics-platform)</u>

Resource Library (https://www.informationbuilders.com/en-au/resource-library)

X

### **Gomes Declaration - 0054**















Leaders in <u>Business Intelligence (/en-au/business-intelligence</u>) and <u>Data</u>

<u>Management (/en-au/data-management)</u> |

<u>Privacy Policy (/en-au/privacy-policy)</u>

### TRADE MARKS ACT 1995

Exhibit D

# DECISION OF A DELEGATE OF THE REGISTRAR OF TRADE MARKS WITH REASONS

Re: Opposition by Information Builders Inc to registration of trade mark application 1591048(9) - **FOCUSED PATIENT CARE** - filed in the name of SXG Investments Pty Limited.

DELEGATE:	Iain Campbell Thompson	
REPRESENTATION:	Opponent: 1 Place Patent Attorneys + Solicitors	
	Applicant: Thomson Geer - written submissions by Nicholas Smith	
	of Counsel.	
DECISION:	S52 opposition to registration: grounds under sections 44, 42(b), 59,	
	60 and 62A; no ground established; Trade Mark to proceed to registration.	

### **Background**

1. In this matter SXG Investments Pty Limited ('the Applicant') has applied under the *Trade Marks Act 1995* ('the Act') to register the trade mark which appears below:

Application No:

1591048

Priority Date:

13 November 2013

Goods:

Class 9: Computer hardware; Computer software

Trade Mark:

FOCUSED PATIENT CARE

('the Trade Mark')

- The Trade Mark was examined as mandated by section 31 of the Act and advertised as accepted for possible registration in the Australian Official Journal of Trade Marks on 3 April 2013.
- 3. On 3 June 2014 Information Builders Inc ('the Opponent') filed Notice of Intention to Oppose the registration of the Trade Mark. Thereafter, the opposition has proceeded according to the timetable below:
  - **2 July 2014** Statement of Ground and Particulars filed by the Opponent details grounds under

### Section 44 of the Act

Section 44 - Particulars

The Opponent is the registrant of the following Australian Trade Marks:

No. 371785

Trade mark FOCUS

Priority date 18-FEB-1982

Services Class: 42 The provision of a computer program for preparing reports from computerized files and the maintenance of the information in the files

No. 566062 Trade mark FOCUS Priority date 28-OCT-1991

Goods Class: 9 Computer software, including computer programs

No. 787138
Trade mark WEBFOCUS
Priority date 02-MAR-1999
Goods Class: 9 Computer software

### Section 42(b) of the Act

### Section 42(b) - Particulars

- 1. The Opponent has long standing and extensive use of the Opponent's Trade Marks in Australia and internationally in connection with software goods, software services and information technology related goods and services.
- 2. By virtue of its use the Opponent has reputation in the Opponent's Trade Marks in connection with software goods, software services and information technology related goods and services.
- 3. Use of the applied for mark FOCUSED PATIENT CARE in connection with Class 9 Goods would lead to deception or confusion and would contravene the provisions of Sections 18(1) and 29 of the Competition and Consumer Act 2010 Schedule 2.
- 4. Use of the applied for mark in connection with Class 9 Goods would constitute a misrepresentation in the course of trade to the public, including:
  - that there is an association between the business of the Applicant and that of the Opponent; and
  - such that the public is misled into thinking the activity is associated with the Opponent. As a result, the Opponent would suffer damage, and the Applicant would be liable to the Opponent under the common law of passing off.

### Section 59 of the Act

### Section 59 - Particulars

1. The Opponent's enquiries and/or the breadth of the services specification indicate that the Applicant did not, at the time of filing 1591048, have an intention to use the applied for mark in connection with the Class 9 Goods and/or goods claimed by application 1591048.

2. In the alternative, the Opponent's enquiries and / or the breadth of the goods specification indicate that at the time of filing 1591048 any intention on the part of the Applicant to use the applied for mark in connection with Class 9 Goods was insufficiently definite or immediate or that the application was filed for merely defensive or speculative purposes in connection with Class 9 Goods and/or goods claimed by application 1591048.

#### Section 60 of the Act

### Section 60 - Particulars

- 1. The Opponent has long standing and extensive use of the Opponent's Trade Marks in Australia and internationally in connection with software goods, software services and information technology related goods and services. Goods and services have been sold under or by reference to a trade mark containing the word FOCUS worldwide since 1975.
- 2. By virtue of its use and marketing activities the Opponent has acquired a reputation in the
- Opponent's Trade Marks in connection with software goods, software services and information technology related goods and services.
- 3. Because of the Opponent's reputation of the Opponent's Trade Marks, the use of the Applicant's mark in connection with Class 9 Goods would be likely to deceive or cause confusion.

### Section 62A of the Act

### Section 62A - Particulars

The Applicant was aware at the time of filing the application of the Opponent's prior rights in Australia and around the world for marks containing FOCUS.

- 18 July 2014 the Applicant filed Notice of Intention to Defend
- 23 October 2014 the Opponent filed Evidence in Support declaration of:

Gerald David Cohen, President and Chief Operating Officer of the Opponent made on 23 October 2014 with Exhibits GC-1 – GC-8.

**5 February 2015** – Applicant filed Evidence in Answer – declaration of:

Steve Mike Gomes, director of Rauland Pty Ltd and the Applicant, made on 2 February 2015 with Exhibits SG-1 – SG-8.

**18 May 2015** – Opponent filed Evidence in Reply – declaration of:

Lance Newman Scott, Solicitor and Registered Trade Mark Attorney, made on 18 May 2015 together with Exhibits LNS-1 to LNS-2.

**8 July 2015** – Applicant filed request under regulation 21.19 of the *Trade Mark Regulations 1995* ('the Regulations') – declaration of:

Steve Mike Gomes, made on 3 July 2015 with Exhibits SG-1 – SG2.

**22 July 2015** – Applicant filed written submissions by Nicholas Smith of Counsel.

4. Neither party has requested to be heard. The matter has been passed to me as delegate of the Registrar of Trade Marks in order that she may meet her obligation under section 55 of the Act to decide the matter. My decision is based on the written record – that is, those materials listed at [3], above.

### **Onus & Relevant Date**

- 5. The Opponent bears the onus of establishing one or more grounds of opposition on the balance of probabilities.<sup>1</sup>
- 6. The relevant date at which the grounds under section 52 of the Act must be considered is the filing date of the opposed application<sup>2</sup>.

#### Evidence

7. The evidence establishes:

The Opponent used its trade mark FOCUS in relation to computer software since 1975 in the USA when it sold its software to service bureaux that in turn sold time on their computers to customers;

The Opponent sold its FOCUS trade marked software direct to the public since the early 1980's.

8. Mr Cohen states in his declaration:

The Opponent's FOCUS software has been used for over thirty years by thousands of the world's leading corporations, institutions, and government agencies. The Opponent's FOCUS software has been used by more than a million users working on virtually every computer platform, from mainframe to PC. The Opponent's FOCUS software has been used for the following purposes:

- a. computer software for database management;
- b. computer software for use in decision support systems;
- c. computer software for use in enterprise reporting and analysis systems and for building applications for the management and tracking of data for enterprise reporting systems;
- d. computer database programs for use in connection with decision support, analysis and reporting programs;

<sup>2</sup> Southern Cross Refrigerating Co v Toowoomba Foundry Pty Ltd (1954) 91 CLR 592.

<sup>&</sup>lt;sup>1</sup> Pfizer Products Inc v Karam [2006] FCA 1663; 237 ALR 787; (2006) 70 IPR 599; [2006] AIPC 92-146 per Gyles J at [6] to [26]; Telstra Corporation Ltd v Phone Directories Co Pty Ltd [2015] FCAFC 156].

- e. computer software development tools for use in developing decision support, analysis, and reporting systems and applications;
- f. computer software, namely client/server reporting, analysis and decision report tools;
- g. computerised database, reporting and analysis software for use on corporate intranet websites;
- h. enterprise server software for use in web-based data publishing, reporting and analysis solutions;
- i. computer software for accessing databases by means of global computer networks to generate reports;
- j. software development tools for making reporting and analysis available through global computer network worldwide websites and for extending the functionality of enterprise reporting and analysis systems on to global computer networks; and,
- k. computer software for accessing and updating databases through global computer networks.
- 9. In 1996, states Mr Cohen, the Opponent started use of its WEBFOCUS trade mark. The software sold under the WEBFOCUS trade mark by the Opponent builds, says Mr Cohen, upon the earlier FOCUS software.

### 10. Mr Cohen declares:

The Opponent's WEBFOCUS software is compatible with the Opponent's older FOCUS software. Therefore, FOCUS software users are easily able to integrate the Opponent's WEBFOCUS software on their systems. Unless specifically stated otherwise, or unless the context otherwise indicates, references in this declaration to the Opponent's FOCUS software include the Opponent's WEBFOCUS software.

11. The Opponent operates in many countries around the world. Mr Cohen states:

The Opponent is currently represented in over 40 countries across the world and has in excess of 11,000 global customers. It also has more than 350 business partners worldwide. The Opponent normally has in the region of 1500 employees at any given time and currently achieves in excess of U\$300 million in annual revenue.

Apart from the Opponent's representatives or agents across the world, the Opponent also has more than 46 offices worldwide. These offices are located in many countries around the world including, but not limited to Australia, Brazil, Canada, France, Germany, The Netherlands, Portugal, Spain, Switzerland, [the] United Kingdom and the United States of America. A list of the Opponent's worldwide offices is now shown to me and marked Exhibit

GC-2. Over the last 25 years the Opponent has installed products in over 75 countries.

12. Mr Cohen's declaration provides worldwide revenue figures and advertising expenditure in relation to its "FOCUS software" in the years 1990 to 2013. These are in the order of several hundreds of millions annually. Concerning the promotion of the goods sold under the FOCUS trade marks Mr Cohen's declaration exhibits 12 press releases from within the time period 2002 to 2013. I will note now that the subject matter of these materials is almost exclusively goods sold under the WEBFOCUS trade mark – the Opponent's FOCUS trade mark is mentioned once. For instance, a passage about the Opponent within Exhibit GC-7, which is repeated across the twelve press releases, states:

### **About Information Builders**

Information Builders, a \$300 million company, is the leader in enterprise business intelligence and real-time Web reporting. The company's WebFOCUS product – the industry's most secure and flexible – is able to meet all the reporting needs of the extended enterprise, ranging from analysts to power users to the widest deployments for hundreds of thousands of users. Additionally, WebFOCUS' empowerment of organizations seeking to leverage all their data by accessing it all – from legacy to data warehouse – is unmatched.

Information Builders' award-winning technology has successfully provided quality software and superior services for 30 years to more than 12,000 customers, including most of the Fortune 100 and U.S. federal government agencies. Headquartered in New York City with 90 offices worldwide, the company employs 1,750 people and has over 350 business partners.

- 13. Although Mr Cohen declares that these press releases have "been distributed in Australia", I note that they are marked as being released in New York. It is not obvious therefore that they were reproduced in the Australian media or had a distribution to the Australian media beyond the Opponent's Australian offices which are in Sydney and Melbourne.
- 14. Mr Cohen supplies a list of some 60 customers in Australia who "use the Opponent's FOCUS and WEBFOCUS software products." It is not stated by Mr Cohen which of these organisations use the older FOCUS trade marked software. Confusingly, Mr Cohen states that "The Opponent's FOCUS and WEBFOCUS trade marks have been used by the Opponent in Australia since 1982". This is confusing because it is at odds with Mr Cohen's earlier statement that "The Opponent commenced use of its trade mark WEBFOCUS in 1996."

- 15. Mr Cohen provides sales figures for goods sold in Australia. He states, "In order to illustrate the Opponent's use of its trade marks FOCUS and WEBFOCUS in Australia, details of the Opponent's sales figures for Australia are tabulated below". These sales are of the order of a few millions annually. The sales figures are not broken down between the goods sold under the trade marks FOCUS and WEBFOCUS. Figures are given also in relation to expenditure on promotion but, again, these figures are not broken down between goods sold under the Opponent's FOCUS and WEBFOCUS trade marks.
- 16. In his evidence in reply Mr Gomes explains that the Trade Mark is used in relation to computer software used in the healthcare industry. Relevant to my decision, Mr Gomes states:

The word "focus" is a commonplace English word with meanings including "a central point, as of attraction, attention, or activity" and "to concentrate; to focus one's attention". It is not surprising therefore that there are a large number of trade marks that include that word, including in respect of computer software and similar or related products. I annex and mark SG-8 a copy of search results from a part word search for FOCUS, in class 9 only, in IP Australia's Online Trade Mark Database listing 74 pending and registered trade marks containing the word FOCUS and including a summary page of the search results.

17. Of the trade marks at Exhibit SG-8 to Mr Gomes's declaration I note that the following which were filed prior to the Trade Mark include 'software' within their respective goods specifications:

780963 (MICRO FOCUS); 814396 (VFM FOCUS); 1024002 (CatFocus); 1119521 (WINEFOCUS); 1146920 (MICRO **FOCUS** STUDIO); 1146921 (MICRO **FOCUS** SERVER); 1147097 (IntelligenceFocus); 1233667 (FLEET (GMAT FOCUS); FOCUS); 1239885 1247925 (MindFocus); 1262359 (MICRO FOCUS DATA EXPRESS); 154311 (SMARTFOCUS); and, 1566584 SPEAKFOCUS.

18. In his evidence in reply Mr Scott draws attention to the paucity of use of the Trade Mark by the Applicant on its website. While this is answered by the regulation 21.19 information supplied by Mr Gomes, the absence of use or otherwise of the Trade Mark on the Applicant's website is not relevant to my considerations for reasons which will become apparent. I therefore do not admit or rely on the regulation 21.19 information in this decision.

### Section 44

19. Section 44 of the Act relevantly provides:

### 44 Identical etc. trade marks

- (1) Subject to subsections (3) and (4), an application for the registration of a trade mark (applicant's trade mark) in respect of goods (applicant's goods) must be rejected if:
  - (a) the applicant's trade mark is substantially identical with, or deceptively similar to:
    - (i) a trade mark registered by another person in respect of similar goods or closely related services; or
    - (ii) a trade mark whose registration in respect of similar goods or closely related services is being sought by another person; and
  - (b) the priority date for the registration of the applicant's trade mark in respect of the applicant's goods is not earlier than the priority date for the registration of the other trade mark in respect of the similar goods or closely related services.

Note 1: For deceptively similar see section 10.

Note 2: For similar goods see subsection 14(1).

Note 3: For priority date see section 12.

Note 4: The regulations may provide that an application must also be rejected if the trade mark is substantially identical with, or deceptively similar to, a protected international trade mark or a trade mark for which there is a request to extend international registration to Australia: see Part 17A.

- 20. In terms of this matter the Opponent must establish all of the following to found the section 44 ground:
  - 1. Registrations owned by a person other than the Applicant with an earlier priority date that that of the Trade Mark; and,
  - 2. which have similar goods to those for which registration of the Trade Mark is sought; and,
  - 3. that the trade marks under consideration are as a minimum deceptively similar.
- 21. Firstly, registrations 566062 (FOCUS) and 787138 (WEBFOCUS) have priority dates which are earlier than that of the Trade Mark and are owned by the Opponent. I will mention now that I will exclude 371785 (FOCUS) from my considerations as it is a registration in respect of services: if the opposition cannot be established in relation to registrations 566062 (FOCUS) and/or 787138 (WEBFOCUS), it follows that it will not be established in relation to registration 371785; conversely, if the opposition is established in relation to registrations 566062 and/or 787138, then consideration of 371785 (FOCUS) is unnecessary.

- 22. Secondly, the goods of the parties are similar goods: computer software.
- 23. Therefore, thirdly, it remains to be considered whether or not the trade marks under consideration are either substantially identical or deceptively similar.
- 24. In considering substantial identity, in *Shell Co of Australia Ltd v Esso Standard Oil* (Australia) Ltd<sup>3</sup> ('Shell') Windeyer J said at [12]:

In considering whether marks are substantially identical they should, I think, be compared side by side, their similarities and differences noted and the importance of these assessed having regard to the essential features of the registered mark and the total impression of resemblance or dissimilarity that emerges from the comparison. "The identification of an essential feature depends", it has been said, "partly on the Court's own judgment and partly on the burden of the evidence that is placed before it": *de Cordova v. Vick Chemical Co.* (1951) 68 RPC 103, at p 106. Whether there is substantial identity is a question of fact: see *Fraser Henleins Pty Ltd v. Cody* [1945] HCA 49; (1945) 70 CLR 100, per Latham C.J. (1945) 70 CLR, at pp 114, 115, and *Ex parte O'Sullivan; Re Craig* [1944] NSWStRp 28; (1944) 44 SR (NSW) 291, per Jordan C.J. (1944) 44 SR (NSW), at p 298, where the meaning of the expression was considered.

- 25. Obviously, the trade marks under consideration are, on a side by side comparison, substantially different. Although the expression 'patient care' within the Trade Mark might go to the kinds of considerations in *PB Foods Ltd v Malanda Dairy Foods Ltd*<sup>4</sup>, the change from the word 'focus' in the Opponent's trade marks to 'focused' in the Trade Mark does, in my consideration, change the emphasis and idea of the trade marks considerably.
- 26. The trade marks are not substantially identical.
- 27. As regards deceptive similarity, in *Shell* at [13] Windeyer J continued:

On the question of deceptive similarity a different comparison must be made from that which is necessary when substantial identity is in question. The marks are not now to be looked at side by side. The issue is not abstract similarity, but deceptive similarity. Therefore the comparison is the familiar one of trade mark law. It is between, on the one hand, the impression based on recollection of the plaintiff's mark that persons of ordinary intelligence and memory would have; and, on the other hand, the impressions that such persons

<sup>&</sup>lt;sup>3</sup> [1963] HCA 66; (1963) 109 CLR 407

<sup>&</sup>lt;sup>4</sup> [1999] FCA 1602; [1999] AIPC 40-117; (1999) 47 IPR 47

would get from the defendant's television exhibitions. To quote Lord Radcliffe again: "The likelihood of confusion or deception in such cases is not disproved by placing the two marks side by side and demonstrating how small is the chance of error in any customer who places his order for goods with both the marks clearly before him . . . . It is more useful to observe that in most persons the eye is not an accurate recorder of visual detail, and that marks are remembered rather by general impressions or by some significant detail than by any photographic recollection of the whole": de Cordova v. Vick Chemical Co (1951) 68 RPC, at p 106. And in Australian Woollen Mills Ltd v. F.S. Walton & Co. Ltd. [1937] HCA 51; (1937) 58 CLR 641 Dixon and McTiernan JJ. said: "In deciding this question, the marks ought not, of course, to be compared side by side. An attempt should be made to estimate the effect or impression produced on the mind of potential customers by the mark or device for which the protection of an injunction is sought. The impression or recollection which is carried away and retained is necessarily the basis of any mistaken belief that the challenged mark or device is the same" (1937) 58 CLR, at p 658.

[...]

The deceptiveness that is contemplated must result from similarity; but the likelihood of deception must be judged not by the degree of similarity alone, but by the effect of that similarity in all the circumstances.

- 28. Further, the assessment should be in the context of the marketplace of the relevant goods and the habits and perceptions of purchasers within that market. Thus, for example, people will generally purchase goods from the shelves of supermarkets<sup>5</sup> with less care and attention than they pay to the purchase of a motorcar<sup>6</sup>.
- 29. In this regard in Application by the Pianotist Co Ltd<sup>7</sup> Parker J said:

You must take the two words. You must judge of them, both by their look and by their sound. You must consider the goods to which they are to be applied. You must consider the nature and kind of customer who would be likely to buy those goods. In fact, you must consider all the surrounding circumstances; and you must further consider what is likely to happen if each of those trade marks is used in a normal way as a trade mark for the goods of the respective owners of the marks. If, considering all those circumstances, you come to the conclusion that there will be a confusion -- that is to say, not necessarily that one man will be injured and the other will gain illicit benefit, but that there will be a confusion in the mind of the public which will lead to confusion in the

<sup>7</sup> (1906) 1A IPR 379 at 380; 23 RPC 774 at 777,

<sup>&</sup>lt;sup>5</sup> Stuart Alexander & Co (Interstate) Pty Ltd v Blenders Pty Ltd [1981] FCA 152; 37 ALR 161; (1981) 53 FLR 307; [1981] TPRS 314319.

<sup>&</sup>lt;sup>6</sup> LANCER Trade Mark Application [1987] FPC 303 [ LANCER versus LANCIA for motorcars]

goods -- then you may refuse the registration, or, rather, you must refuse the registration in that case.

30. And the assessment of the likelihood of deception or confusion is moderated by the factors discussed in *Registrar of Trade Marks v Woolworths*<sup>8</sup> by French J who said at [50]:

In Southern Cross Refrigerating Co v Toowoomba Foundry Pty Ltd (1954) 91 CLR 592 at 594-5, which concerned the 1905 Act, Kitto J set out a number of propositions which have frequently been quoted and applied to the 1955 Act. The essential elements of those propositions continue to apply to the issue of deceptive similarity under the 1995 Act. Applied also to service marks and absent the imposition of an onus upon the applicant they may be restated as follows:

- (i) To show that a trade mark is deceptively similar to another it is necessary to show a real tangible danger of deception or confusion occurring. A mere possibility is not sufficient.
- (ii) A trade mark is likely to cause confusion if the result of its use will be that a number of persons are caused to wonder whether it might not be the case that the two products or closely related products and services come from the same source. It is enough if the ordinary person entertains a reasonable doubt.

It may be interpolated that this is another way of expressing the proposition that the trade mark is likely to cause confusion if there is a real likelihood that some people will wonder or be left in doubt about whether the two sets of products or the products and services in question come from the same source.

- (iii) In considering whether there is a likelihood of deception or confusion all surrounding circumstances have to be taken into consideration. These include the circumstances in which the marks will be used, the circumstances in which the goods or services will be bought and sold and the character of the probable acquirers of the goods and services.
- (iv) The rights of the parties are to be determined as at the date of the application.
- (v) The question of deceptive similarity must be considered in respect of all goods or services coming within the specification in the application and in respect of which registration is desired, not only in respect of those goods or services on which it is proposed to immediately use the mark. The question is not limited to whether a particular use will give rise to deception or confusion. It must be based upon what the applicant can do if registration is obtained.

In respect of the last proposition, Mason J observed in *Berlei Hestia Industries Ltd v The Bali Company Inc* [1973] HCA 43; (1973) 129 CLR 353 at 362:

<sup>8 [1999]</sup> FCAFC 1020; [1999] FCA 1020; (1999) 93 FCR 365; (1999) 45 IPR 411; [1999] AIPC 91-499

"...the question whether there is a likelihood of confusion is to be answered, not by reference to the manner in which the respondent has used its mark in the past, but by reference to the use to which it can properly put the mark. The issue is whether that use would give rise to a real danger of confusion."

- 31. The marketplace here is the one in which people buy software for their computers. The specifications of goods of the trade marks under consideration are broad enough that this includes those who purchase software for their home computers as well as the top-end purchasers who are buying software for government departments or large companies<sup>9</sup>. However, in my observations of the world, such software in either market is not bought casually or lightly but after some research as to which particular software will suit the user's needs. Thus trade marks used in relation to such goods are likely to be inspected carefully and accordingly recalled with some degree of accuracy.
- 32. I do not consider that the Opponent has shown that it has a family of trade marks and that the purchaser might see the Trade Mark as being a brand extension of that family. In order to do so, the Opponent must show that the 'house mark' or 'parent' trade mark (FOCUS) is exclusive to it, and that it has used both the parent and the brand extensions to the parent such that the public is likely to see the Trade Mark as being a further brand extension<sup>10</sup>.
- 33. However, here there are those other trade marks on the Australian register, listed at [17] of these reasons which contain descriptive matter as well as the word 'focus'. Additionally, it is not possible to determine from Mr Cohen's declaration whether the Opponent is still using the trade mark FOCUS (as opposed to WEBFOCUS) relation to goods in Australia. The evidence is unclear but, taken as a whole, Mr Cohen's declaration suggests that the Opponent's FOCUS trade mark is used in relation to services supporting a legacy system but not in relation to goods.
- 34. The Opponent has not, therefore, established that the Trade Mark is likely to be apprehended by potential purchasers as being a brand extension of its FOCUS trade mark.
- 35. Having regard to the differences of ideas in the trade marks under consideration, I consider that confusion or deception is not likely. The stress in the Trade Mark lies in the

<sup>&</sup>lt;sup>9</sup> The so-called 'notional use' test: Re Smith Hayden and Co's Application (1946) 63 RPC 97 at 101.8.

<sup>&</sup>lt;sup>10</sup> John Fitton & Co. Ltd's Application (1949) 66 RPC 110 at 113 (the trade marks JEST and EASY JEST).

qualification by the word 'focused' of the words 'patient care' – alluding to the idea that the patient care is attentive or intensive. Such intensive attention is either elsewhere in the Opponent's WEBFOCUS trade mark or not specified in the Opponent's FOCUS trade mark.

- 36. Accordingly, having regard to the marketplace for the goods and the purchasers within that commercial environment, and the ideas of, and similarities and the differences between the trade marks, I consider that there is not a realistic likelihood that use of the Trade Mark will confuse or deceive.
- 37. The Opponent has not established its ground under section 44 of the Act.

#### Section 59

38. Section 59 of the Act provides:

### 59 Applicant not intending to use trade mark

The registration of a trade mark may be opposed on the ground that the applicant does not intend:

- (a) to use, or authorise the use of, the trade mark in Australia; or
- (b) to assign the trade mark to a body corporate for use by the body corporate in Australia;

in relation to the goods and/or services specified in the application.

Note: For applicant see section 6.

39. As noted by the Registrar's delegate Mr Kirov in *Self Care Corporation Pty Ltd v Johnson* & *Johnson*<sup>11</sup> at [56] (footnotes omitted):

This issue was addressed in some detail in two decisions issued by the Federal Court in 2010, firstly by the Full Court (Keane CJ, Stone and Jagot JJ) in *Food Channel Network Pty Ltd v Television Food Network GP* ("Food Channel"), followed by Dodds-Streeton J in *Suyen Corporation v Americana International Limited* ("Suyen").

It has long been accepted that the very filing of an application to register a trade mark is *prima facie* evidence of an applicant's intention to use that mark for the goods or services of the application. As Dodds-Streeton J put it in *Suyen* at [193], "an application for registration of a trade mark has given rise to a presumption that the requisite intention to use the mark exists". Noting that "a number of recent authorities have ... endorsed its continuing application", ("most significantly" *Food Channel*), her Honour continued at [197]:

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<sup>11 [2015]</sup> ATMO 27

The presumption was first recognised under legislation which cast on the applicant the burden of establishing entitlement to registrability. Although the applicant no longer bears that burden, nothing in the language of s 27 or any other relevant provision of the present Act suggests a legislative intention to depart from the long-established presumption of intention to use recognised under previous legislation. To the contrary, as possession of the requisite intention is a pre-condition of entitlement to apply, it may readily be presumed from the fact of application.

### In Food Channel itself, the Full Court had said at [67] and [68]:

Section 27(1)(b) of the Act requires that the applicant use or intend to use, or authorise use or intend to authorise use of, the trade mark. The time at which this intention must exist is the date of application ... . Only a very low threshold has been set with regard to intention to use in that the very act of making the application is, without more, sufficient to establish the requisite intention. In *Aston v Harlee Manufacturing Co* [1960] HCA 47; (1960) 103 CLR 391; [1960] ALR 605 ("Aston") Fullagar J said (at CLR 401; ALR 611, footnote omitted):

There is another element mentioned by Dixon J in the Shell Co's Case, which is stated as essential to the proprietorship of an unused trade mark. That element is the intention of the applicant for registration to use it upon or in connexion with goods. As to this I need only say that I do not regard his Honour as meaning that an applicant is required, in order to obtain registration, to establish affirmatively that he intends to use it. There is nothing in the Act or the Regulations which requires him to state such an intention at the time of application, and the making of the application itself is, I think, to be regarded as prima facie evidence of intention to use. I cannot think that the Registrar is called upon to institute an inquiry as to the intention of any applicant, and I think that, on an opposition or on a motion to expunge, the burden must rest on the opponent or the person aggrieved, of proving the absence of intention.

### Fullagar J went on to say (also at CLR 401; ALR 611):

[Again, I do not think that "intention" in this connexion ought to be regarded as meaning an intention to use immediately or within any limited time.] A manufacturer of (say) confectionery would, I should suppose, be entitled to register three trade marks in relation to confectionery, though he intended only to use two of them and had not made up his mind as to which two he would use ... On the other hand, a manufacturer of confectionery, who had no intention of ever manufacturing motor cars, might be held disentitled to register a mark in relation to motor cars ...

- 40. The substance of this ground consists of firstly a contention that the scope of the Applicant's goods specification is broad and secondly that the Opponent could not find mention of the Trade Mark on the Applicant's website. The first contention may be answered by observing that the Applicant may intend to use its trade mark on many different goods which occur within the specification. Further, the Applicant's apparent goods of interest fall within the scope of the specification and the Opponent's own specifications suffer from the same alleged defect. As regards the second contention, the Applicant is not required to show any use of the Trade Mark and the application to file the Trade Mark is *prima facie* evidence of its intention to use the Trade Mark. Consequently, the non-appearance of the Trade Mark on the Applicant's website does not signify anything in relation to the section 59 ground.
- 41. The Opponent has not established its ground under section 59 of the Act.

### Section 60 and paragraph 42(b)

42. Section 60 of the Act provides:

## 60 Trade mark similar to trade mark that has acquired a reputation in Australia

The registration of a trade mark in respect of particular goods or services may be opposed on the ground that:

- (a) another trade mark had, before the priority date for the registration of the first-mentioned trade mark in respect of those goods or services, acquired a reputation in Australia; and
- (b) because of the reputation of that other trade mark, the use of the first-mentioned trade mark would be likely to deceive or cause confusion.

Note: For priority date see section 12.

- 43. To found this ground the Opponent must establish:
  - 1. that there is a trade mark (or trade marks) that,
  - 2. had a reputation in Australia such that,
  - 3. the use of the Trade Mark would be likely to deceive or confuse.

- 44. Here the Opponent's evidence goes to the reputation of its WEBFOCUS and FOCUS trade marks in Australia and, to an extent, 'spillover' reputation resulting from international use of its trade marks in terms of *Conagra Inc v McCain Foods Pty Ltd*<sup>12</sup>.
- 45. As to what 'reputation' is, in *McCormick & Co Inc v McCormick*<sup>13</sup> ('*McCormick*') Kenny J said at [81]:

What is intended by the word "reputation" in s 60? The word is defined in The Macquarie Dictionary as follows:

reputation ... 1. the estimation in which a person or thing is held, esp. by the community or the public generally; repute ... 2. favourable repute; good name ... 3. A favourable and publicly recognised name or standing for merit, achievement, etc. ... 4. The estimation or name of being, having done, etc, something specified.

Cf. The Oxford English Dictionary. In s 60, the word is, I think, apt to refer to "the recognition of the McCormick & Co marks by the public generally".

46. Heerey J in Le Cordon Bleu B.V. v Cordon Bleu International Ltee<sup>14</sup> said (albeit in relation to subparagraph 28(a) of the Trade Marks Act 1955) that the reputation required to be demonstrated was:

... one of which a significant number of persons were aware ... What is 'significant' or 'substantial' will depend on the nature of the goods or services in question. For some highly specialised products, awareness among a few thousand persons, or even less, might be sufficient.

47. As regards the assessment of reputation, Kenny J, in McCormick, said at [86]:

In practice, it is commonplace to infer reputation from a high volume of sales, together with substantial advertising expenditures and other promotions, without any direct evidence of consumer appreciation of the mark, as opposed to the product: see, e.g., Isuzu-General Motors Australia Ltd v Jackeroo World Pty Ltd (1999) 47 IPR 198; Marks & Spencer plc v Effem Foods Pty Ltd (2000) AIPC 91-560; Photo Disc Inc v Gibson (1998) 42 IPR 473; and RS Components Ltd v Holophane Corp (1999) 46 IPR 451. This Court has followed this approach as well, acknowledging that public awareness of and regard for a mark tends to correlate with appreciation of the products with which that mark is associated, as evidenced by sales volume, amongst other things. Thus, in Toddler Kindy Gymbaroo Pty Ltd v Gymboree Pty Ltd [2000] FCA 618 ("Gymboree"), Moore J accepted at [94] that the applicant had

<sup>12 (1992) 23</sup> IPR 193.

<sup>&</sup>lt;sup>13</sup> [2000] FCA 1335; (2000) 51 IPR 102; [2000] AIPC 38-192.

established a reputation for the purposes of s 60 solely on the basis of use and promotion of the relevant mark. Another example of this approach is *Nettlefold Advertising Pty Ltd v Nettlefold Signs Pty Ltd* (1997) 38 IPR 495 ("Nettlefold"), in which Heerey J relied upon the public visibility of the applicant's marks over approximately two decades as well as a \$100,000 promotional campaign in finding that a reputation for the purposes of s 28 of the 1955 Act existed.

- 48. Here the Opponent has effectively bundled discussion of the trade marks FOCUS and WEBFOCUS together in its evidence such that the assessment of the reputation of either is not possible. As I have observed, my view of the evidence is that it is likely that the Opponent's FOCUS trade mark is used by the Opponent in relation to a legacy product and, consequently, if either of its trade marks does have a reputation it is the Opponent's WEBFOCUS trade mark. Moreover, the Opponent has stated that its use of its WEBFOCUS trade mark started in Australia in both 1982 and 1996. There is no means for me to resolve this apparent contradiction.
- 49. However, inasmuch as the Opponent's WEBFOCUS trade mark might have a reputation, the apparent price of the goods, the specialty of Opponent's marketplace, the caution and expertise of the purchasers within that marketplace, and the differences between the trade marks WEBFOCUS and FOCUSED PATIENT CARE are such that it is not likely that the use of the Trade Mark would confuse or deceive.
- 50. The Opponent has not established its ground under section 60 of the Act.

### Paragraph 42(b)

- 51. I turn now to the ground under paragraph 42(b) of the Act as it is related to the ground under section 60.
- 52. Paragraph 42(b) of the Act provides:

### 42 Trade mark scandalous or its use contrary to law

An application for the registration of a trade mark must be rejected if:

- [...]
- (b) its use would be contrary to law.

- 53. In Advantage Rent-A-Car Inc v Advantage Car Rental Pty Ltd<sup>15</sup> Madgwick J held that paragraph 42(b) of the Act encompasses all applicable laws.
- 54. Here the Opponent alleges that the use of the Trade Mark by the Applicant would be contrary to the Australian Consumer Law ('the ACL'), which is contained in Schedule 2 to the *Competition and Consumer Act 2010*, relying upon subsection 18(1) and subsections (g) and (h) of section 29, which subsections correspond to section 52 and subparagraphs 53(c) and (d) of the now repealed *Trade Practices Act 1974* ('the TPA'). Schedule 2 of the ACL relevantly provides:

### Section 18: Misleading or deceptive conduct

(1) A person must not, in trade or commerce, engage in conduct that is misleading or deceptive or is likely to mislead or deceive.

### Section 29: False or misleading representations about goods or services

- (1) A person must not, in trade or commerce, in connection with the supply or possible supply of goods or services or in connection with the promotion by any means of the supply or use of goods or services:
  - (g) make a false or misleading representation that goods or services have sponsorship, approval, performance characteristics, accessories, uses or benefits; or
  - (h) make a false or misleading representation that the person making the representation has a sponsorship, approval or affiliation;
- 55. However, these provisions are to be considered at a higher standard (mislead or deceive) than similar considerations under section 60 of the Act which are at the lower standard of 'confuse or deceive'. It thus usually follows that if an opponent has not established its opposition under section 60 of the Act then neither will it establish its opposition under paragraph 42(b) when arguing that use of a trade mark would be contrary to the ACL. In *Parkdale Custom Built Furniture Pty Ltd v Puxu Pty Ltd*<sup>16</sup> at 688, Gibbs CJ said with respect to section 52 of the TPA:

In McWilliam's Wines Pty Ltd v McDonald's System of Australia Pty Ltd [1980] FCA 159; (1980) 33 ALR 394 it was rightly held by Smithers J and by Fisher J that to prove a breach of s 52 it is not enough to establish that the conduct complained of was confusing or caused people to wonder whether two products may have come from the same source, and that Southern Cross

16 [1982] HCA 44; (1982) 1A IPR 684

<sup>15 [2001]</sup> FCA 683; (2001) 52 IPR 24; [2001] AIPC 91-724.

Refrigerating Co v Toowoomba Foundry Pty Ltd [1953] HCA 73; (1954) 91 CLR 592; 1A IPR 465, a decision on the Trade Marks Act 1905 (Cth) as amended, is distinguishable.

- 56. Similar remarks apply in relation to the alternative ground of opposition under paragraph 42(b) of the Act which alleges a passing off which tort is considered at the standard 'mislead or deceive'.
- 57. The Opponent has not established its ground under paragraph 42(b) of the Act.

### Section 62A

58. Section 62A of the Act provides:

### 62A Application made in bad faith

The registration of a trade mark may be opposed on the ground that the application was made in bad faith.

- 59. The Opponent's Statement of Grounds and Particulars states "The Applicant was aware at the time of filing the application of the Opponent's prior rights in Australia and around the world for marks containing FOCUS."
- 60. The Opponent's evidence does not support the above contention and, furthermore, if the Applicant was aware of the Opponent's trade marks at the time of filing the Trade Mark, this (without more) does not signify bad faith.
- 61. The ground under section 62A is not established.

### Decision

62. Subsection 55(1) of the Act provides:

### 55 Decision

- (1) Unless subsection (3) applies to the proceedings, the Registrar must, at the end, decide:
  - (a) to refuse to register the trade mark; or
  - (b) to register the trade mark (with or without conditions or limitations) in respect of the goods and/or services then specified in the application;

having regard to the extent (if any) to which any ground on which the application was opposed has been established.

Note: For limitations see section 6.

- 63. The Opponent has not established a ground of opposition.
- 64. The trade mark application may then proceed to registration one month from the date of this decision. If the Registrar has been served with a notice of appeal before that time, I direct that registration shall not occur until the appeal has been decided or discontinued and the disposition of the application should be in accordance with the Court's order or direction.

### Costs

65. The Applicant has sought its costs in this matter and I accordingly award costs against the Opponent at the scale set out in Schedule 8 to the Regulations.

Iain Campbell Thompson

Entono.

Hearing Officer Trade Marks Hearings

1 March 2016

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE BEFORE THE COMMISSIONER OF PATENTS AND TRADEMARKS

----X

INFORMATION BUILDERS, INC.

Plaintiff, :

Opposition No. 91232514

V.

Application No. 86143360

SXG INVESTMENTS PTY LIMITED :

Defendant. :

----X

## PLAINTIFF'S RESPONSES TO DEFENDANT'S FIRST REQUESTS FOR PRODUCTION

Plaintiff, Information Builders Inc., pursuant to Rule 2.120 of the Trademark Rules of Practice of the Patent and Trademark Office and Rule 34 and of the Federal Rules of Civil Procedure, hereby submits its response to Defendant's First Set of Document Requests To Plaintiff.

### General Objections

- A. Plaintiff objects to these requests to the extent they seek documents or information protected by the attorney-client privilege, work product doctrine, or other applicable privilege or immunity.
- B. Plaintiff objects to these requests to the extent they seek trade secrets, research and development information, proprietary or confidential business or financial information, business plans and marketing

information, or any other highly sensitive or confidential commercial information that is subject to protection under state or federal law or is otherwise within the protections of Rule 26(c) of the Federal Rules of Civil Procedure. Plaintiff will produce such information subject to the Protective Order applicable in this proceeding.

- C. Plaintiff objects to these requests to the extent they are (1) unreasonably cumulative, (2) seek information that is irrelevant and immaterial to the subject matter involved in this action, (3) not reasonably calculated to lead to the discovery of admissible evidence, (4) overly broad or unduly burdensome, (5) vague and/or ambiguous or (6) beyond the scope of discovery under the applicable Rules.
- D. Plaintiff objects to these requests to the extent they purport to require it to gather or provide documents, things or information in the possession of third parties.
- E. Plaintiff objects to these requests to the extent they seek to impose obligations in excess of those imposed by the applicable Rules.
- F. Plaintiff objects to these requests to the extent they seek "all," "each" or "every" document relating to any specific subject, on the grounds that such requests are overly broad, unduly burdensome and do not seek information

relevant to the claims and defenses in this proceeding. Plaintiff will interpret these requests reasonably in preparing its response.

- G. Plaintiff reserves the right to object to the admission into evidence of any and all documents, things or information made available in response to these requests on any permissible grounds, including without limitation the ground that the information is irrelevant and immaterial to the subject matter of this action.
- H. As the investigation of and discovery in these matters continue, Plaintiff expressly reserves the right, within the scope of the applicable Rules, to revise, modify or amend, at any time, its responses, and to introduce at trial any evidence from any source or any witness.

The foregoing General Objections are incorporated by reference into Plaintiff's Specific Objection to each individual request. For particular emphasis, Plaintiff has, from time to time, expressly included one or more of the General Objections in the Specific Objections listed below. Plaintiff's Specific Objection to an individual request for production is made without prejudice to, and without in any respect waiving, any General Objection not expressly set forth in the Specific Objection. The assertion of any General Objection in a Specific Objection should not be

interpreted to exclude the applicability of any other General Objection to that or any other specific request for production. Document Requests

### Requests for Production

### REQUEST NO. 1:

Documents, electronically stored information and tangible things sufficient to identify each different advertising, marketing, promotional effort made on behalf of Opposer for its Goods and Services, which mention thereon or make references to the applicability of Opposer's Goods and services for use by hospitals or companies in business of providing health-care, including but not limited to labels, packaging, flyers, hangtags, direct mail pieces, point of sale pieces, signs, posters, newspaper advertisements, magazine advertisements, Internet or online advertisements, media articles, catalogs, circulars, leaflets, brochures, websites, and any other publicly distributed materials, including drafts and mockups.

### Response

Plaintiff objects to this request as overly broad, vague, and burdensome. The term "efforts" is vague and not included in Defendant's list of definitions. Nor is the request limited in time as Plaintiff has been in business

and has used its marks since 1975. Without waiving its objection, Plaintiff will produce sample documents responsive to this request.

### REQUEST NO. 2:

Documents, electronically stored information, and tangible things sufficient to identify and describe the Opposer's Goods and Services.

### Response

Plaintiff will produce documents responsive to this request.

### REQUEST NO. 3:

Documents, electronically stored information and tangible things sufficient to evidence each different use of the Opposer Marks in the United States by Opposer, including but not limited to use of the Opposer's Registered Marks or any form or derivative of the Opposer Marks.

### Response

Plaintiff objects to this request as overly broad, and burdensome. Plaintiff has used its marks probably millions of times over the past 43 years. Without waiving its objection, Plaintiff will produce sample documents responsive to this request.

### REQUEST NO. 4:

Documents, electronically stored information and tangible things sufficient to identify each sale of Opposer's goods and services purchased for use by hospitals or businesses in the field of health care, within the last ten years.

### Response

Plaintiff objects to this request as overly broad, and burdensome. Plaintiff will produce representative documents under the Patent and Trademark Office protective order.

### REQUEST NO. 5:

All documents, electronically stored information and tangible things relating to or referring to, trademark disputes concerning Opposer Marks including federal or state court trademark litigation and Trademark Trial and Appeal Board proceedings.

### Response

Plaintiff objects to this request as overly broad, and burdensome in view of the hundreds of such disputes. Without waiving its objection, Plaintiff will produce documents which identify such disputes in response to this request.

### REQUEST NO. 6:

Documents, electronically stored information and tangible things relating to or referring to, Opposer's

policing or enforcement efforts including but not limited to all cease and desist letters or letters mentioning violation or perceived violation of any of Opposer's trademarks.

### Response

Plaintiff objects to this request as overly broad, and burdensome in view of the hundreds of incidents to which this request refers. Without waiving its objection, Plaintiff will produce sample documents responsive to this request.

### REQUEST NO. 7:

Documents, electronically stored information and tangible things sufficient to identify each different distributor, licensees and/or other business partners that Opposer uses or intends to use for Opposer Goods and Services in the United States.

### Response

Plaintiff objects to this request as overly broad, and burdensome. Plaintiff will produce representative documents which identify distributors of its products.

### REQUEST NO. 8:

Documents, electronically stored information and tangible things sufficient to identify the corporate

structure and ownership of Opposer and any related companies within the meaning of the Lanham Act.

Response

Plaintiff objects to this request as overly broad, vague, and not calculated to lead to the discovery of admissible evidence. Notwithstanding the objections, Plaintiff will produce documentation identifying key corporate executives and their positions.

REQUEST NO. 9:

Documents, electronically stored information and tangible things sufficient to identify to [sic] the trade channels through which the Opposer Goods and Services are marketed, distributed, and sold in the United States, including the type of customers, the purchasing process, and method of sales and distribution channels.

Response

Plaintiff will produce representative documents.

REQUEST NO. 10:

Documents, electronically stored information and tangible things sufficient to identify the average contract price for software goods and services which are promoted under Opposer's Marks.

Response

Plaintiff has no documents which "identify the average contract price" of its goods and services. To the extent this request calls for documents containing the charge for every sale of Plaintiff's goods and services, objection is made on the ground that the request is overly broad and burdensome.

### REOUEST NO. 11:

Documents, electronically stored information and tangible things sufficient to identify each different market research or consumer surveys conducted by or for Opposer including the results thereof, which relate to or refer to brand recognition of the Opposer' Marks in the United States and the results thereof.

### Response

Plaintiff objects to this request to the extent that it calls for production of documents which Plaintiff is contractually obligated to maintain confidential without a court order. Without waiving its objection, Plaintiff will produce sample documents responsive to this request.

### REQUEST NO. 12:

All non-privileged documents, electronically stored information and tangible things relating to any trademark search, and results therefrom for marks similar to Opposer's Marks or searches relating to the dilution or

existence of other marks which include the word FOCUS or formative versions thereof.

### Response

Plaintiff objects to this request to the extent it calls for attorney-client privileged communications.

Plaintiff will produce documents comprising trademark search results.

### REQUEST NO. 13:

Documents, electronically stored information and tangible things sufficient to identify the types of individuals who purchase and/or utilize or are likely to purchase and/or utilize the Opposer Goods and Services in the United States.

### Response

Plaintiff objects to this request as vague as there is no specific "type" of purchaser or user of its goods and services. Notwithstanding the objection, Plaintiff will produce documents describing representative purchasers and users of its goods and services.

### REQUEST NO. 14:

Documents, electronically stored information and tangible things sufficient to identify each different license agreement, settlement agreement, or assignment pertaining to the Opposer Marks in the United States.

### Response

Plaintiff objects to this request as burdensome in view of the large number of settlement agreements, and not calculated to lead to the discovery of admissible evidence. Without waiving its objection, Plaintiff will produce sample documents responsive to this request.

### REQUEST NO. 15:

Documents, electronically stored information and tangible things sufficient to identify each instance(s) of actual or possible consumer confusion between the Opposer Marks and any use of any mark by a third party.

### Response

No such documents are known to exist.

### REQUEST NO. 16:

Documents, electronically stored information and tangible things sufficient to identify the dollar volume of advertising and promotional expenditures made in connection with the Opposer Goods and Services sold using the mark FOCUS by itself which did not include use of the mark WEB FOCUS for the last ten years.

### Response

Plaintiff objects to this request as overly broad, vague, and not calculated to lead to the discovery of

admissible evidence. Moreover, such documents do not distinguish between FOCUS and WebFOCUS.

Without waiving its objection, Opposer will produce sample documents responsive to this request which do not distinguish between FOCUS and WebFOCUS.

REQUEST NO. 17:

All Documents, electronically stored information and tangible things relating to or referring to a likelihood of confusion between the Opposer Marks and the Applicant's Marks.

Response

Plaintiff has no such documents other than attorneyclient privileged correspondence and correspondence with the Defendant and its attorney.

REQUEST NO. 18:

Documents, electronically stored information and tangible things relating to or referring to dilution of any of the Opposer's Marks in the United States.

Response

Plaintiff is aware of no such documents.

REQUEST NO. 19:

Documents, electronically stored information and tangible things sufficient to identify all third party uses

of the mark FOCUS or FOCUS-formative marks which was known by Opposer prior to the commencement of this opposition.

Response

See responses to Requests Nos. 5 and 6.

INFORMATION BUILDERS, INC.

/Howard F. Mandelbaum/
Howard F. Mandelbaum
Attorney for Plaintiff
Levine Mandelbaum PLLC
222 Bloomingdale Road
Suite 203
White Plains, NY 10605
(914) 421-0500

### CERTIFICATE OF SERVICE

It is hereby certified that a copy of the foregoing PLAINTIFF'S RESPONSES TO DEFENDANT'S FIRST REQUESTS FOR PRODUCTION has been forwarded, July 2, 2018, by email to:

Jeffrey H Greger, Esq. Lowe Hauptman & Ham LLP 2318 Mill Rd Ste 1400 Alexandria, VA 22314-6878

at

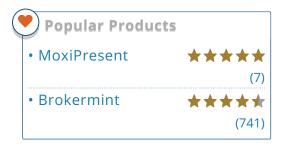
jhgreger@ipfirm.com

/Howard F. Mandelbaum/
Howard F. Mandelbaum



↑ Home ➤ Real Estate CMA Software ➤ Focus 1st





### **★** Average Ratings

Overall	****
Ease of Use	****
Customer	****
Service	

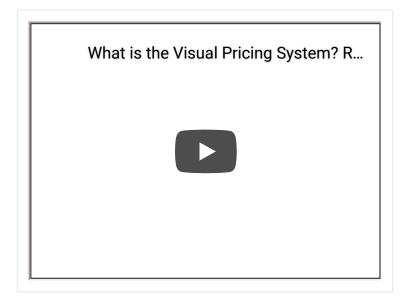
**Review This Product!** 

### Product Details

Vendor has not completed this information.

### **1** About Focus 1st

Visual price presentation solution that uses data exported from MLS to create client charts and presentations.



### **≡** Focus 1st Features

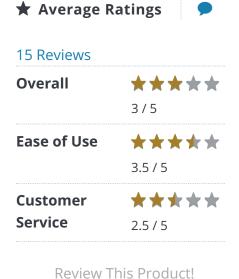


↑ Home ➤ Accounting Software ➤ Focus 9





**Who Uses This Software?** Focus 9 serves to small, medium and enterprise level customers with equal ease and flexibility across multiple industry verticals



**6** About Focus 9

Focus 9 is a leading ERP software equipped with ultramodern technology by Focus Softnet, a distinguished enterprise applications provider designing products with leading-edge capabilities. The comprehensive web-based software, Focus 9 is furnished with advanced tools enabling organizations across industries to optimize the critical business functions including human capital management, accounting and financial, enterprise performance management, supplier and customer relationship management.

Product Details

Focus9 | Next-Generation ERP Softw...

Search



Software Categories Categories

♠ Home ➤ Restaurant POS Software ➤ Focus e-RMS





**Who Uses This Software?** Focus e- RMS serves to Resturants, hotels and Hospitality industries

### **★** Average Ratings

Overall	****
Ease of Use	****
Customer	****
Service	

Review This Product!

### Product Details

Starting	\$30.00/month/
Price	user

### About Focus e-RMS

Focus e-RMS is the next generation restaurant management software, customizable to fit unique business requirements. The powerful and flexible business management solution helps streamline core functions to increase the speed of service and enables strategic decision-making while elevating the customer experience. It empowers owners and managers to track purchase orders, procurement, inventory, stock reconciliation, and return processing to control costs and reduce waste. The application also pr

Focus eRMS | Restaurant Manageme...

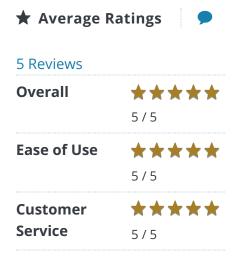


↑ Home ➤ Contact Management Software ➤ Focus Ministry





**Who Uses This Software?** We serve any organization that manages mission trips and we also serve those that have data entry people entering connect/communication cards or offering/donation envelopes manually.



**Review This Product!** 

### 

### **1** About Focus Ministry

NextSteps can read and export data from contact/communication cards directly into your ChMs. Missions is a fully integrated missions management software for Churches. Manage trips and participants with ease with our Missions Software. Manual data entry of cards and offering/donations envelopes are a thing of the past. Come see why churches are loving our software and and connecting with their members and community like never before.

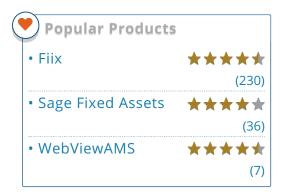




Search

↑ Home ➤ Fixed Asset Management Software ➤ Focus MRP





**Who Uses This Software?** Manufacturing companies across various industry sectors

### **★** Average Ratings

Overall	****
Ease of Use	****
Customer Service	****

**Review This Product!** 

### Product Details

StartingNot providedPriceby vendor

### **1** About Focus MRP

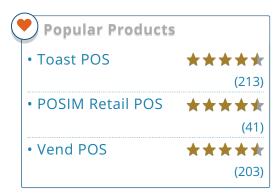
Focus MRP is an advanced ERP solution for manufacturing units/plants, which enables establishments to gain end-to-end traceability of entire plant operations. It streamlines core business functions to optimize manufacturing production scheduling and master the complexities. Dedicated modules for shop floor management, shift management, quality control, maintenance and fixed assets management drive operational excellence with quicker response to customer demands.



Search

↑ Home ➤ Point of Sale Software ➤ Focus POS





Who Uses This Software? All categories which fall under retail segment

### **★** Average Ratings

Overall	****
Ease of Use	****
Customer Service	****

**Review This Product!** 

### Product Details

**Starting** \$30.00/month/ **Price** user

### **1** About Focus POS

Focus POS (point-of-sale) is a complete ERP Solution, empowering retailers to track purchase orders and payments, manage real-time inventory data, loyalty programs, sales analytics, and more through a unified platform. The software is customizable and is equipped with features like touchscreen UI and multiple form factors for speeding process time. It can be implemented as both a standalone solution or integrate with our software to simplify business operations and deliver an inspired customer e



↑ Home ➤ Task Management Software ➤ FocusMe for Outlook







**Who Uses This Software?** Anyone looking to improve their ability to focus attention on personal & team objectives through the creation and management of projects and tasks.

### **★** Average Ratings



### **1** About FocusMe for Outlook

17 Reviews

Overall

4.5/5

Ease of Use

4/5

Customer

Service

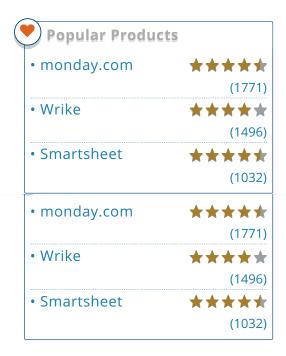
5/5

Ceptara's FocusMe application is a Microsoft Outlook 2010-2016 add-in designed to help you and your team achieve greater focus by taming email, organizing action (mail, tasks, appointments, documents, & notes) by project, track time and billing, and facilitate collaboration via email, FocusSync and SharePoint. The tool saves you time and stress by focusing you on achieving your goals.

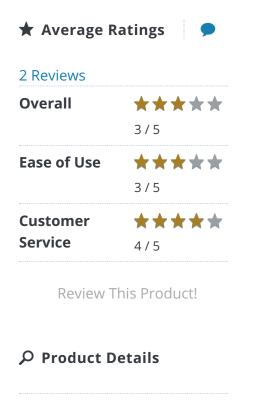
**Review This Product!** 

Ceptara - Introducing FocusMe for Ex...





**Who Uses This Software?** For companies in need of product management tools to increase productivity.

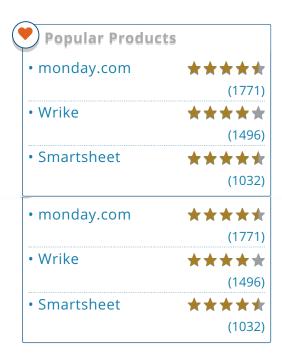


### **1** About Hello Focus

Forever change your work! Built to help you and your team get more done.





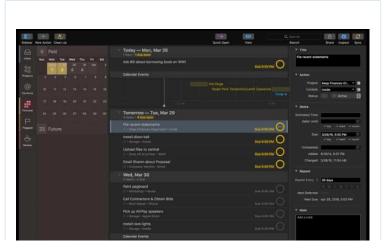


**Who Uses This Software?** For business professionals and students who are looking to organize and track their tasks.

# Average Ratings 41 Reviews Overall 4.5/5 Ease of Use 4/5 Customer Service 4.5/5 Review This Product!

### **6** About OmniFocus

Task management app for iOS with light and dark modes that can display, or "focus on", a selected sets of tasks at any given time.



Product Details

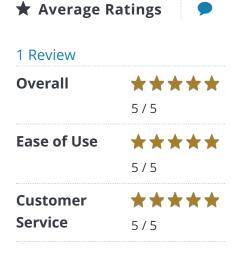


↑ Home ➤ Budgeting Software ➤ Visual Cash Focus





**Who Uses This Software?** Any Business or organisation wanting to produce budget and rolling forecast, profit and loss, balance sheet and cash flows for management reporting without using excel.



**Review This Product!** 

### **1** About Visual Cash Focus

Driver-based Budgeting and Rolling Forecast software Visual Cash Focus integrates budgeting, planning, forecasting, rolling forecasts, consolidation and financial reporting in a single tool. For small to large organisations Visual Cash Focus suits most industry types. The software is simple, easy, accurate and fast and removes the potential for errors inherent in spreadsheet budgeting solutions and is easy to implement.



**Software Categories** 

Search

Home

Restaurant POS Software

Focus Restaurant POS Software



### Focus Restaurant POS Software

by Focus POS Systems

3/5 (9) Write a Review!

**About** 

Pricing

Features

Comparisons

Reviews

Resources

### **Best For**

Focus POS is focused on providing a system that streamlines the processes of a restaurant and giving it access to control labor costs, inventory and more.

### **Product Details**

Formerly known as Restaurant POS Software

Restaurant POS system that manages delivery, table service, kitchen, inventory, and other processes.

### **Company Details**

Focus POS Systems http://www.focuspos.com Founded in 1990

### Table Service Demo



**Software Categories** 

Search

Home

Restaurant POS Software

Focus Restaurant POS Software



### Focus Restaurant POS Software

by Focus POS Systems

3/5 (9) Write a Review!

**About** 

Pricing

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Comparisons

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### Table Service Demo



↑ Home ➤ Timeshare Software ➤ FOCUS





# ★ Average Ratings 1 Review

Overall

4/5

Ease of Use

4/5

Customer

Service

5/5

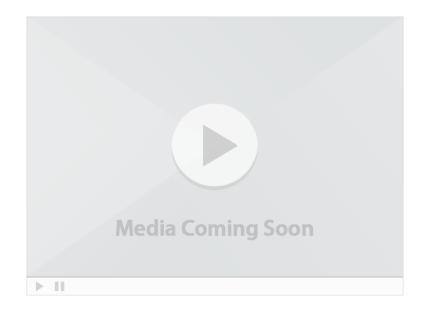
**Review This Product!** 

### Product Details

Starting \$1,500.00/mont Price h

### **6** About FOCUS

CRM solution for timeshare and vacation club sales that helps manage the entire process from tours to escrow.





↑ Home ➤ School Administration Software ➤ Focus SIS





**Who Uses This Software?** Web-based student information management system which assists private schools, school districts and colleges with data and project management.

# ★ Average Ratings 7 Reviews Overall 4/5 Ease of Use 4/5 Customer Service 3/5 Review This Product! Product Details

### **1** About Focus SIS

Focus/SIS is a flexible, scalable application that streamlines inefficient processes and offers schools and school districts a 10+ year product lifecycle, ensuring maximum ROI. Focus/SIS is a partner-source solution which opens the source code for collective development among large districts and creates the most flexible platform for data management ever.

sis tutorials focus taking attendance ...

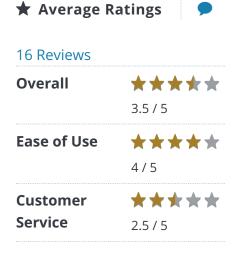


↑ Home ➤ Warehouse Management Software ➤ Focus WMS





**Who Uses This Software?** Warehouses, Supply Chain Industries, Inventory and Logistics



**Review This Product!** 

### About Focus WMS

Focus WMS is a leading inventory and warehouse management system with innovative product features to plan and monitor storage, logistic, distribution, supply chain, human resource, and costs. Easy-to-use interface of the software combined with the speed, accuracy, and savings, maximizes logistics performance and fulfilment capabilities of establishments. The dynamic and cost-effective solution enabled with advanced wireless and barcode technology supports complex fulfilment operations

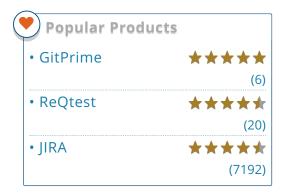
### Product Details



Software Categories Categories
Search

↑ Home ➤ Application Lifecycle Management Software ➤ ALM Software





## **★** Average Ratings



## About ALM Software

18 Reviews

Overall

4/5

Ease of Use

4/5

Customer

Service

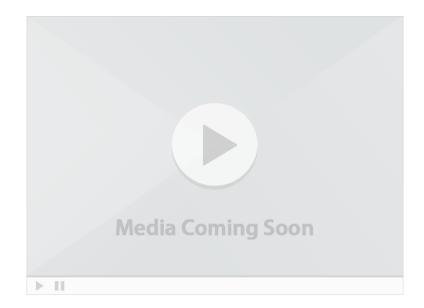
4/5

**Review This Product!** 



Vendor has not completed this information.

A unified software platform for accelerating the delivery of secure, reliable, modern applications.





Software Categories Categories
Search

↑ Home ➤ Real Estate CMA Software ➤ Focus 1st





## **★** Average Ratings

Overall	****
Ease of Use	****
Customer	****
Service	

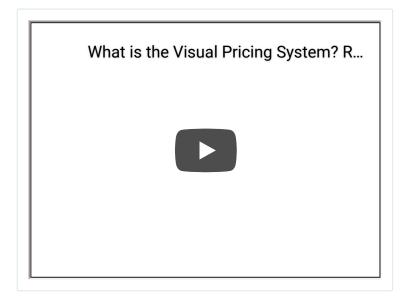
**Review This Product!** 

#### Product Details

Vendor has not completed this information.

### **1** About Focus 1st

Visual price presentation solution that uses data exported from MLS to create client charts and presentations.



#### **≡** Focus 1st Features

Focus 1st Reviews and Pricing - 2019

## Real Estate CMA Features >

View full list of Real Estate CMA Software

✓ Contact Management
 ✓ Lead Capture
 ✓ Market Charts
 ✓ Presentation Tools
 ✓ Price Forecasting
 ✓ Proposal Generation

#### Focus 1st Reviews

✓ Templates

Review This Product!

Sort by:

Most Help ▼

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			Select your country:



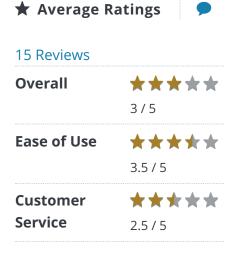
Software Categories Categories
Search

♠ Home ➤ Accounting Software ➤ Focus 9





**Who Uses This Software?** Focus 9 serves to small, medium and enterprise level customers with equal ease and flexibility across multiple industry verticals



**Review This Product!** 

**6** About Focus 9

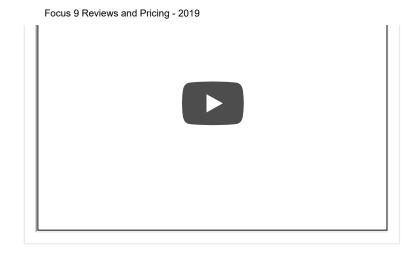
Focus 9 is a leading ERP software equipped with ultramodern technology by Focus Softnet, a distinguished enterprise applications provider designing products with leading-edge capabilities. The comprehensive web-based software, Focus 9 is furnished with advanced tools enabling organizations across industries to optimize the critical business functions including human capital management, accounting and financial, enterprise performance management, supplier and customer relationship management.

Product Details

Focus9 | Next-Generation ERP Softw...

8/9/2019

Starting Not provided Price by vendor Free ✓ Yes Demo **Deploym** ✓ Cloud, SaaS, ent Web ✓ Installed -Windows **Training** ✓ Documen tation ✓ Webinars ✓ Live Online ✓ In Person Support ✓ Online ✓ Business Hours ✓ 24/7 (Live)



## **■** Vendor Details

Focus SoftNet

www.focussoftnet.ca

Founded 1992

United States

Rep)

## **≡** Focus 9 Features

## Accounting Features **▼**

View full list of Accounting Software

View full list of Accounts Payable Software

View full list of Accounts Receivable Software

View full list of Enterprise Resource Planning
Software

View full list of Financial Reporting Software

View full list of Financial Services Software

**P Focus 9 Reviews** ◀ Recently Reviewed!

**Enterprise Resource Planning** 

Financial Reporting Features <

Financial Services Features <

**Review This Product!** 

Features <

Sort Most Help ▼

3/12



# 'Focus 8 itself is alright but execution and customer support failed'

Oct 09, 2018



**Pros:** User friendly, flexible, allow customization, a lot of features

**Cons:** Implementation took way too long and not professional.

What promised could be deliver in the initial presentation was not able to deliver during implementation and did not fully customize to fit into the business.

Too many bugs i.e. those report and function used to be alright then suddenly it does not work.

There are a lot of issues & bugs that the support team cannot solve and they did not follow up at all.

**Overall:** Customer support is worst i.e. when we highlight our issues and problems they are not able to solve and also did not follow up.

Software itself is not stable, too many bugs.

Those basic report such as P&L, B/S and GST report are not well set up and difficult to use.



#### 'FOCUS 9 ERP'

Feb 12, 2019

VIQUAR J.

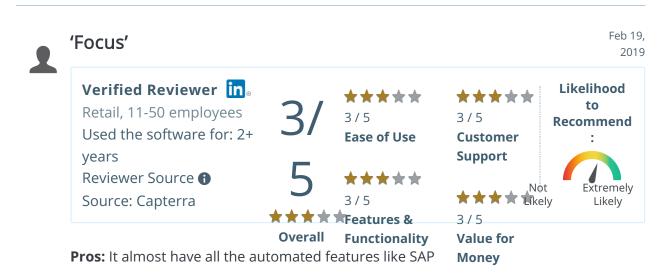
8/9/2019



**Pros:** ALL MODULES AVAILABLE , SALES PURCHASE, DELIVERY NOTES, MRN, INVOICING, PAYMENT

**Cons:** NEED TO CUSTOMIZE AND STUDY THE END USER REQUIREMENTS MINUTELY NOT READY TO USE NEEDS TO FIT AS PER COMPANY REQUIREMENTS AND THIS LEADS TO ERRORS IN FORMULA EXECUTED BY IMPLEMENTATION TEAM.

**Overall:** OVERALL GOOD, BUT YOU HAVE TO REVIEW YOURSELF THE CHANGES MADE ARE REFLECTED IN EACH AND EVERY REPORT AND OTHER LINKED DOCUMENTS ELSE YOUR REVISION OR CHANGES TO VOUCHER / DOCUMENTS WILL PUT YOU IN PROBLEM AS WRONG DATA WILL BE THE RESULT OF MINOR MISTAKES IN FORMULA.



**Cons:** Many complications/errors arises from time to time, print lay-out need to design or enter the field one by one, not that flexible configuration, problem solving is slow and not available in google compare to SAP and other software.

Overall: Just average. Usable



## 'ERP for Automotive Spare Parts Management'

Feb 19, 2019



**Pros:** The ease of use and the way the software was built around my business us case.

**Cons:** Reporting could have been little more dynamic by including pivot tables

**Overall:** I am using Focus 9 to manage my automotive spare parts business, it helped me scale my operations in the last 2 years. I am quite satisfied and highly recommend the software.



## 'Ideal ERP for Small Manufacturing Company'

Feb 12, 2019



**Pros:** Ease of use. Acceptable interface for users

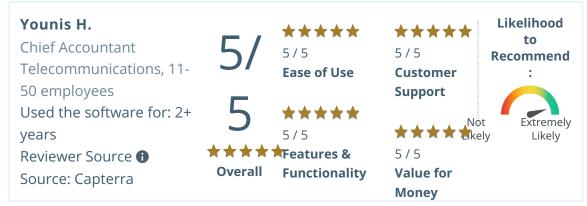
**Cons:** rigid framework. Customization becomes tedeous

#### **Overall:** Inventory Management has become easy and accurate



## 'Over All Satisfied'

Feb 19, 2019



Pros: Ease Of Use overall

I Like It since was focus 6

Cons: None, as customer care is covering all points



## 'Zibara Clothing'

Oct 07, 2018



**Pros:** that we can expedite the process from quoting to invoice to order

**Cons:** that I cannot view certain Focus Reports. Focus is not user friendly on the purchases side for me

Overall: not sure

## 'Overall Good'

Oct 06, 2018



**Pros:** Options are good, little flexible, crystal report can be developed, interface okay.

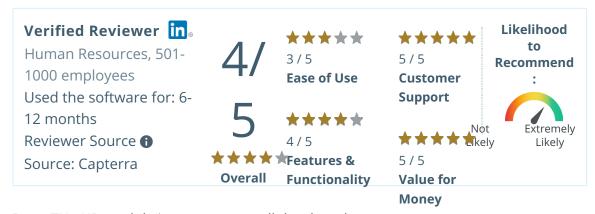
**Cons:** User Friendly, Unlimited masters that helps in categorizing the transactions.

**Overall:** It has option to develop crystal reports, unlimited masters available that helps in reporting and decision making.

# 1

#### 'Focus 8 Review'

Oct 08, 2018



**Pros:** THe HR module is easy to use well developed

**Cons:** the accounting module need to be online on webpage

**Overall:** I am satisfied with the product. i am waiting for more developement to the accounting interface to be more a web page with easier access

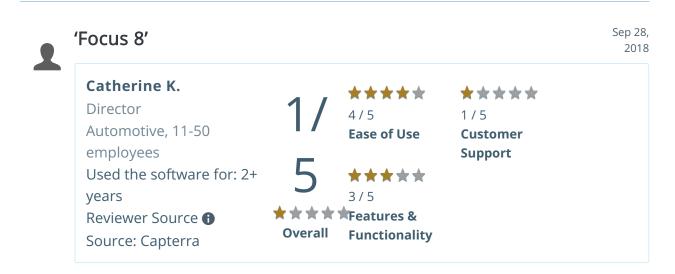
## "CA review"

Feb 19, 2019



**Pros:** it is easy to use with Arabic and RTL support and can provide accurate data in good forms

**Cons:** this program is one of the beast live transaction withe handheld devices



Pros: It's Customisation and the ease of reporting

**Cons:** Software bugs and technical not able to resolve. Critical financial acs, reconcile, customer outsnding, balances got errors. 2 yrs past and still problem exist.

**Overall:** Instead of solving problems, gv more trouble and need extras man power to test its software

Focus 9 Reviews and Pricing - 2019



## 'Focus ERP Poor Customer Support'

Dec 30, 2018



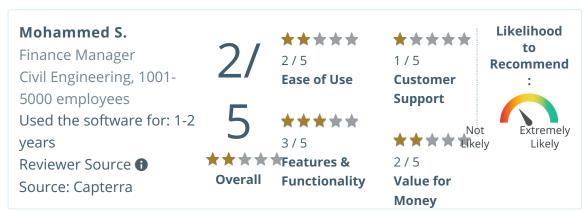
**Pros:** Easy to use, flexible, allows customisation and reporting.

**Cons:** lot of bugs, it hangs in between, very poor customer support.



## 'Under Implementation'

Feb 12, 2019



**Pros:** Good reports and good structure of the software

Cons: Weak implementation team and not much customized

Overall: Not as expected



#### 'VERY BAD SYSTEM'

Feb 16, 2019

RANIA A.



Software Categories Categories
Search

↑ Home ➤ Restaurant POS Software ➤ Focus e-RMS





**Who Uses This Software?** Focus e- RMS serves to Resturants, hotels and Hospitality industries

## **★** Average Ratings

Overall	****
Ease of Use	****
Customer	****
Service	

**Review This Product!** 

## Product Details

Starting	\$30.00/month/
Price	user

#### **1** About Focus e-RMS

Focus e-RMS is the next generation restaurant management software, customizable to fit unique business requirements. The powerful and flexible business management solution helps streamline core functions to increase the speed of service and enables strategic decision-making while elevating the customer experience. It empowers owners and managers to track purchase orders, procurement, inventory, stock reconciliation, and return processing to control costs and reduce waste. The application also pr

Focus eRMS | Restaurant Manageme...

8/9/2019 Focus e-RMS Reviews and Pricing - 2019 ✓ Yes Free Demo Deploym Cloud, SaaS, Web ent ✓ Installed -Windows **Training** ✓ Documen tation ✓ Webinars ✓ Live Online ✓ In Person Support ✓ Online ✓ Business Hours ✓ 24/7 (Live) Rep) **■** Vendor Details Focus SoftNet www.focussoftnet.ca Founded 1992 **United States ≡** Focus e-RMS Features Restaurant POS Features ➤ View full list of Restaurant POS Software ✓ Delivery Management

Gift Card Management

Focus e-RMS Reviews and Pricing - 2019

- ✓ Inventory Management
- ✓ Loyalty Program
- ✓ Mobile Access
- ✓ Online Ordering
- Reporting/Analytics
- Separate Checks
- ✓ Split Checks
- ✓ Table Management
- ✓ Tips Management

Franchise Management
Features <

Order Management Features **<** 

Restaurant Management Features <

View full list of Franchise Management Software

View full list of Order Management Software

View full list of Restaurant Management Software

#### Focus e-RMS Reviews

Review This Product!

No reviews, be the first!

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Focus e-RMS Reviews and Pricing - 2019

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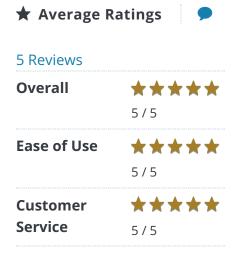
Software Categories Categories
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↑ Home ➤ Contact Management Software ➤ Focus Ministry





**Who Uses This Software?** We serve any organization that manages mission trips and we also serve those that have data entry people entering connect/communication cards or offering/donation envelopes manually.



**Review This Product!** 

## Product Details

## **1** About Focus Ministry

NextSteps can read and export data from contact/communication cards directly into your ChMs. Missions is a fully integrated missions management software for Churches. Manage trips and participants with ease with our Missions Software. Manual data entry of cards and offering/donations envelopes are a thing of the past. Come see why churches are loving our software and and connecting with their members and community like never before.



8/9/2019

Starting \$20.00/month **Price Pricing** \$20 Per active **Details** mission trip for Missions. \$30 minimum for NextSteps. Free ✓ Yes Demo **Deploym** ✓ Cloud, SaaS, ent Web ✓ Mobile -**Android Native** ✓ Mobile - iOS Native **Training** ✓ Documen tation ✓ Webinars ✓ Live Online Support ✓ Online ✓ Business Hours

## **■** Vendor Details

52projects
52projectsllc.com/
Founded 2013
United States

Focus Ministry Reviews and Pricing - 2019

From Focus Ministry

01:33

## **≡** Focus Ministry Features

# Contact Management Features ➤ View full list of Contact Management Software ✓ Contact Database ✓ Contact Import/Export ✓ Interaction Tracking ✓ Lead Management Prospecting Tools ✓ Sales Pipeline Management Search/Filter ✓ Segmentation Shared Contacts **■ Focus Ministry Reviews** • Recently Reviewed! **Review This Product!** Sort Most Help by: Oct 09.



### 'Focus Missions'

Oct 09, 2018



**Pros:** Currently, Focus Missions is used for everything missions based at our church. We are a church who uses the motto, "Life Life on Mission" and we constantly send

#### Focus Ministry Reviews and Pricing - 2019

trips and missionaries out. This is one of the most organized, easily manageable and team-oriented software that we've ever used as a church. We don't just use it for missions, but we also use it for camp attendances for our youth departments. It does an incredible job of handling finances per team, making it easy to fundraise, and being able to record necessary forms for each trip.

**Cons:** So far we have nothing negative to say about this software. It does what you expect it will do as a missional based software.



**Pros:** We receive many contact cards each week. there is jurnary enough time in my schedule to manually input each one by myself...and there are critical areas needing attention from my volunteers. Thanks to Focus Min. we are able to do much more multitasking. All we needed was our smart phone & the entire process has been automated.

**Cons:** verifying contact information can be a slow process (especially for illegible entries) but this is minimal compared to the time it takes to enter all the Info. manually.

**Overall:** it has eliminated the slow tedious process of manually entering contact cards each week



## 'Excellent customer service in time sensitive situations'

Apr 20, 2016

#### Leigha S.

Ministry Coordinator Source: Capterra 8/9/2019



**Comments:** I have great custon **Quesch** vice in situations that needed quick turn around times. There has been good follow-up and development when we had needs that were not represented in the software.

Sometimes, I feel like the process of importing the data from Focus to CCB can be too slow but I am learning to be patient because it is likely that the data is difficult to read and process. I am finding that I do not use it every week because if I only have a few cards, it's easier to just do it and not wait for the processing and exporting.

### **→**Vendor Response

by 52projects on April 22, 2016

Leigha,

Thank you for your kind words and trusting us with your members information getting into your ChMs. We look forward to a great relationship.

Blessings,

Rick

# 1

## 'Less Time = More Time'

Apr 07, 2016



Comments: This software is greaterallive been able to reduce the time I spend entering card data and use that time to focus on other projects. In fact, I am now able to track more detailed data because of the reporting offered with this software. Any issues or

Focus Ministry Reviews and Pricing - 2019

concerns I have are addressed very quickly with updates provided continually. The customer service offered really makes us feel like we are more than just another customer.

#### **→**Vendor Response

by 52projects on April 13, 2016

Jessica,

Thank you for your kind words and trusting us with your members information getting into your ChMs. We look forward to a great relationship and yes you are more to us than a customer.

Blessings,

Rick



### 'Great Product!'

Apr 08, 2016



**Comments:** This is such a great **Quest 4b** r administrative use. I have used it on several occasions and love the accuracy with which it can read people's handwriting! It saves from having to verify hundreds of cards each time. But, I am glad there is still the option . It's a wonderful tool that saves you time and money so that you can focus on what needs to be done.

## **→**Vendor Response

by 52projects on April 13, 2016

Crystal,

Thank you for your kind words and trusting us with your members information getting into your ChMs. We look forward to a great relationship.

Blessings, Rick

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Software Categories Categories

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↑ Home ➤ Fixed Asset Management Software ➤ Focus MRP





**Who Uses This Software?** Manufacturing companies across various industry sectors

## **★** Average Ratings

Overall	****
Ease of Use	****
Customer Service	****

**Review This Product!** 

#### Product Details

StartingNot providedPriceby vendor

#### **1** About Focus MRP

Focus MRP is an advanced ERP solution for manufacturing units/plants, which enables establishments to gain end-to-end traceability of entire plant operations. It streamlines core business functions to optimize manufacturing production scheduling and master the complexities. Dedicated modules for shop floor management, shift management, quality control, maintenance and fixed assets management drive operational excellence with quicker response to customer demands.

8/9/2019 ✓ Yes Free Demo Deploym Cloud, SaaS, Web ent ✓ Installed -Windows **Training** ✓ Documen tation ✓ Webinars ✓ Live Online ✓ In Person Support ✓ Online ✓ Business

Media Coming Soon

► II

Focus MRP Reviews and Pricing - 2019

## **■** Vendor Details

Focus SoftNet

www.focussoftnet.ca

Founded 1992

Hours

Rep)

✓ 24/7 (Live)

**United States** 

## **≡** Focus MRP Features

# Fixed Asset Management Features ➤

View full list of Fixed Asset Management Software

Asset Accounting

- Asset Lifecycle Management
- Audit Trail
- ✓ Barcoding/RFID
- Depreciation Management
- ✓ Disposal Management
- ✓ Document Management
- ✓ Inventory Tracking

## Manufacturing Features ✓

View full list of Manufacturing Software

# Manufacturing Execution Features **∢**

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## MRP Features <

View full list of MRP Software

#### Focus MRP Reviews

Review This Product!

Sort by: Most Help ▼

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Software Categories Categories

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Who Uses This Software? All categories which fall under retail segment

## **★** Average Ratings

Overall	****
Ease of Use	****
Customer	****
Service	

**Review This Product!** 

## Product Details

**Starting** \$30.00/month/ **Price** user

## **1** About Focus POS

Focus POS (point-of-sale) is a complete ERP Solution, empowering retailers to track purchase orders and payments, manage real-time inventory data, loyalty programs, sales analytics, and more through a unified platform. The software is customizable and is equipped with features like touchscreen UI and multiple form factors for speeding process time. It can be implemented as both a standalone solution or integrate with our software to simplify business operations and deliver an inspired customer e

8/9/2019 ✓ Yes Free Demo **Deploym** ✓ Cloud, SaaS, ent Web ✓ Installed -Windows **Training** ✓ Documen tation ✓ Webinars ✓ Live Online ✓ In Person Support ✓ Online ✓ Business Hours ✓ 24/7 (Live)



## **■** Vendor Details

Focus SoftNet

www.focussoftnet.ca

Founded 1992

United States

Rep)

## **≡** Focus POS Features

## Point of Sale Features ➤

View full list of Point of Sale Software

- ✓ Barcode Scanning
- Commission Management

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## **Exhibit 2 - 0047**

#### 8/9/2019

#### Focus POS Reviews and Pricing - 2019

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**Software Categories** 

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Restaurant POS Software

Focus Restaurant POS Software



## Focus Restaurant POS Software

by Focus POS Systems

3/5 (9) Write a Review!

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Resources

#### **Best For**

Focus POS is focused on providing a system that streamlines the processes of a restaurant and giving it access to control labor costs, inventory and more.

#### **Product Details**

Formerly known as Restaurant POS Software

Restaurant POS system that manages delivery, table service, kitchen, inventory, and other processes.

## **Company Details**

Focus POS Systems http://www.focuspos.com Founded in 1990

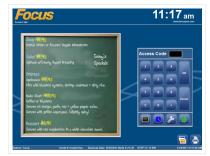
#### Table Service Demo

Focus Restaurant POS Software Reviews and Pricing - 2019















## **Starting Price**

Not provided by vendor

Compare (0) products





Remove All

Installed - Mac Cloud, SaaS, Web Installed - Windows Mobile - iOS Native Mobile - Android Native

## Focus Restaurant POS Software Features

R	estaurant POS
	Delivery Management
	Gift Card Management
	Inventory Management
	Loyalty Program
	Mobile Access
	Online Ordering
	Renorting/Analytics

## Compare with Similar Products

Focus Restaurant POS Software

Add to Compare

Compare	( <b>0</b> ) products		
			Remove All

8/9/2019

Focus Restaurant POS Software Reviews and Pricing - 2019

by Lightspeed

4/5 (596)

Add to Compare

## Focus Restaurant POS Software Reviews

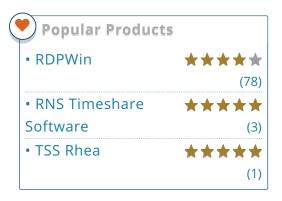
#### Write a Review!

Overall	3/5
Ease of Use	3/5
Customer Service	2/5
Sort by:	
Most Helpful	Show Filters
Showing 9 of 9 reviews	
Jeff H. Owner Restaurants, 11-50 employees Used the software for: 2+ years	
Overall Rating	2/5
Compare (0) products  Remove All	



↑ Home ➤ Timeshare Software ➤ FOCUS





# ★ Average Ratings



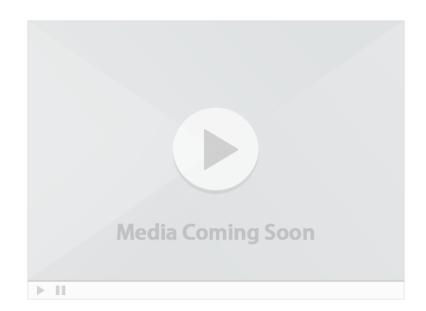
**Review This Product!** 

### Product Details

Starting \$1,500.00/mont Price h

### **1** About FOCUS

CRM solution for timeshare and vacation club sales that helps manage the entire process from tours to escrow.



Review This Product!

**■ FOCUS Reviews** • Recently Reviewed!

Sort Most Help ▼



### 'FOCUS Timeshare Software Review'

Jul 16, 2019



**Pros:** Easy format and layout make input of information easy.

**Cons:** Wish it were more inclusive so that reservations, booking, and checking in could communicate better together. We had so many issues with this.

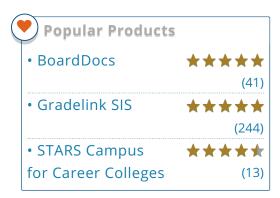
**Overall:** I used Focus everyday when working for a hospitality time share company.

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↑ Home ➤ School Administration Software ➤ Focus SIS





**Who Uses This Software?** Web-based student information management system which assists private schools, school districts and colleges with data and project management.

# ★ Average Ratings 7 Reviews Overall 4/5 Ease of Use 4/5 Customer Service 3/5 Review This Product! Product Details

### **1** About Focus SIS

Focus/SIS is a flexible, scalable application that streamlines inefficient processes and offers schools and school districts a 10+ year product lifecycle, ensuring maximum ROI. Focus/SIS is a partner-source solution which opens the source code for collective development among large districts and creates the most flexible platform for data management ever.

sis tutorials focus taking attendance ...

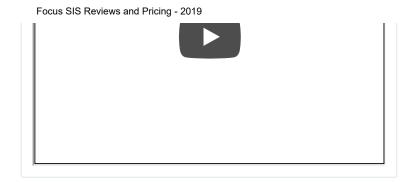
8/9/2019

Starting \$3,000.00/onetime

Free ✓ Yes
Demo

Deploym ✓ Cloud, SaaS,
ent Web

Support ✓ Business
Hours



### **■** Vendor Details

Focus School Software

www.focus-sis.org

Founded 2006

United States

**≡** Focus SIS Features

# School Administration Features ✓ View full list of School Administration Software ✓ Bookstore Management ✓ Cafeteria Management ✓ Curriculum Management ✓ Facility Management ✓ Financial Management ✓ Higher Education ✓ Housing Management

- ✓ Independent/Private
- ✓ K-12
- Library Management
- Online Calendar
- Online Payments
- ✓ Parent/Student Portal
- ✓ Reporting/Analytics
- ✓ School District
- Special Education

### **P** Focus SIS Reviews ◀ Recently Reviewed!

**Review This Product!** 

Sort Most Help w



### 'FOCUS helped my students get into college!'

Jul 02, 2016



**Pros:** It provides information regarding purchasing and payroll, and a learning management system with a lesson planner, but I found it invaluable from a student's perspective. The student has complete control over his academic performance based on the transcript and grades before him. If he's college bound, and wants to earn scholarships or keep track of his rank, he can log into FOCUS on any given day and check it. He can track his attendance and see notes left to him by teachers. From a

Focus SIS Reviews and Pricing - 2019

teacher's perspective, it provides any record one might need. As a coordinator who had to provide data for a certification process, it made my job much easier.

**Cons:** I can't imagine anything out there could be better than FOCUS. If I find it, I will come back to this post and put in my CON. The only CON is that so many school districts don't have it or something close.

Overall: I've been an AVID teacher/coordinator (college readiness) for 4 years, just long enough to see my 9th graders graduate from college this year. FOCUS not only allowed me to customize and provide required reports for an annual certification process, but it provided an easy checks and balance system for my students to continually track their grades, GPA's and rank. Over the years, I watched the "rank" game become a serious one among my students. Universities base everything on quartile with combined SAT/ACT scores. As an AVID teacher, my students knew their Freshman year what most TX universities required for admittance. Seeing it in print every day, watching ranks go up and down became a motivator for my students and over the years, GPA and rank became part of their vocabulary. They set goals, worked harder and I could hold them accountable because I had attendance records, grades, schedules etc. My own kids attend school 20 minutes away in another school district. It is more affluent, yet their district has nothing close to FOCUS. They contract a separate company to provide transcripts (something my students had at their fingertips) and I pay \$3.50 for a copy. Most parents have no idea this is available, nor would they know what to look for if they had it. Having just resigned to seek a higher purpose, I am making it my mission to speak to other school districts about the importance of having an adequate student information system in place. As a result of my 4 year experiment using FOCUS, I had 25 first generation seniors graduate this year with 100% attending college, 85% attending universities and \$1,486,000 in scholarships and grants alone. There are many districts who talk a big game about secondary education being the goal, yet they are unwilling to invest in a system that works for the student.

**Recommendations to other buyers:** Yes, I want to help you sell this product in Texas! We need it everywhere! I've made it my life's mission to ensure all students have the same opportunities to go to college, 1st generation or not. I don't think school districts know what to buy or why certain components are crucial to a student's success.



### 'Great Student Information system'

Oct 24, 2018

Chris C.

8/9/2019



**Pros:** Focus is easy to organize by class, subject, and grading period. You can color code assignment types and tell focus the grade weights for each type, and let it do the math for you. It also has easy access to all student information, including schedules, addresses and parent contact information.

**Cons:** printing report cards can be a difficult task as it is not exactly straightforward. Contacting support can be difficult depending on what level of user you are.

**Overall:** Focus is great for schools and school districts. It is the best student information system I have been able to work with since I've been in education.

# 1

### 'One Stop for Teachers'

Jul 24, 2019



**Pros:** I love how this product has everything a teacher needs all on one page. It is like the perfect platform for teachers to save time.

**Cons:** I do not like how there isn't a one stop sign in for all of the other pages that are connected to it. It can also get confusing when navigating through different tabs and pages, as it is easy to lose your spot.

Focus SIS Reviews and Pricing - 2019

**Overall:** This software makes it easy for teachers like me to have access to everything we might need during a day. Once you get the hang of it, your life as a teacher becomes easier.



### 'Integrates multiple'

Dec 14, 2017



**Pros:** Integrates not just grades, but student documentatio**Maney**all other relevant information in one place. Makes it easier as a teacher to complete grades and attendance quickly. I like that I can see all student information in one location, finding address and parent info is a real advantage. I can also see student accommodations.

**Cons:** In the beginning the system was slow, and crashed multiple times a day. It has been better and easier to find information as the system has been modified getting more user friendly.



### 'Pretty good grade book'

Dec 03, 2018

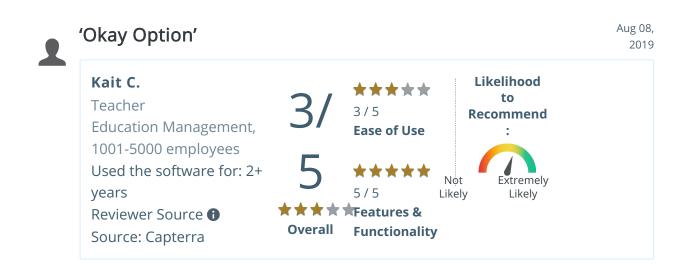


**Pros:** I like how easy it is to enter grades. I also like the grade book reports, it makes parent teacher conferences easier when I can show parents an overview of each

8/9/2019

assignment.

**Cons:** The system is down often, but that could be a district issue.



Pros: It's very easy to use for basic attendance and grading.

**Cons:** I wish it were easier to customize data output within the software.



Pros: -All in one system with go 🗗 🛍 ures

- -Very customizable
- -Great portal for parents/students
- -Moodle integration

-Focus really listens to customers and willing to do whatever they can to help

**Cons:** -We were first big client so had to do a lot of implementation/support

- -Smaller company with not as much expierence as others
- -Needs better testing and change control

**Overall:** -Terrific product and a company that is growing to support it

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↑ Home ➤ Real Estate CMA Software ➤ Focus 1st





### **★** Average Ratings

Overall	****
Ease of Use	****
Customer	****
Service	

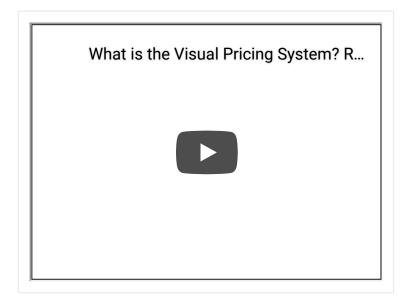
**Review This Product!** 

### Product Details

Vendor has not completed this information.

### **1** About Focus 1st

Visual price presentation solution that uses data exported from MLS to create client charts and presentations.



### **≡** Focus 1st Features

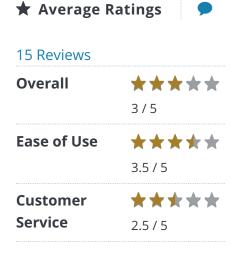


↑ Home ➤ Accounting Software ➤ Focus 9





**Who Uses This Software?** Focus 9 serves to small, medium and enterprise level customers with equal ease and flexibility across multiple industry verticals



**Review This Product!** 

**6** About Focus 9

Focus 9 is a leading ERP software equipped with ultramodern technology by Focus Softnet, a distinguished enterprise applications provider designing products with leading-edge capabilities. The comprehensive web-based software, Focus 9 is furnished with advanced tools enabling organizations across industries to optimize the critical business functions including human capital management, accounting and financial, enterprise performance management, supplier and customer relationship management.

Product Details

Focus9 | Next-Generation ERP Softw...



↑ Home ➤ Restaurant POS Software ➤ Focus e-RMS





**Who Uses This Software?** Focus e- RMS serves to Resturants, hotels and Hospitality industries

### **★** Average Ratings

Overall	****
Ease of Use	****
Customer	****
Service	

**Review This Product!** 

### Product Details

Starting	\$30.00/month/
Price	user

### **1** About Focus e-RMS

Focus e-RMS is the next generation restaurant management software, customizable to fit unique business requirements. The powerful and flexible business management solution helps streamline core functions to increase the speed of service and enables strategic decision-making while elevating the customer experience. It empowers owners and managers to track purchase orders, procurement, inventory, stock reconciliation, and return processing to control costs and reduce waste. The application also pr

Focus eRMS | Restaurant Manageme...

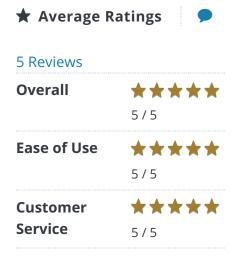


↑ Home ➤ Contact Management Software ➤ Focus Ministry





**Who Uses This Software?** We serve any organization that manages mission trips and we also serve those that have data entry people entering connect/communication cards or offering/donation envelopes manually.



Review This Product!

## **₽** Product Details

### **1** About Focus Ministry

NextSteps can read and export data from contact/communication cards directly into your ChMs. Missions is a fully integrated missions management software for Churches. Manage trips and participants with ease with our Missions Software. Manual data entry of cards and offering/donations envelopes are a thing of the past. Come see why churches are loving our software and and connecting with their members and community like never before.

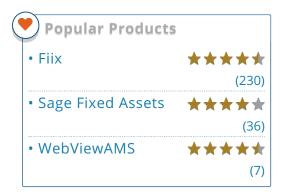




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↑ Home ➤ Fixed Asset Management Software ➤ Focus MRP





**Who Uses This Software?** Manufacturing companies across various industry sectors

### **★** Average Ratings

Overall	****
Ease of Use	****
Customer Service	****

**Review This Product!** 

### Product Details

StartingNot providedPriceby vendor

### **1** About Focus MRP

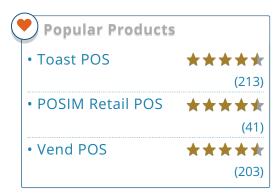
Focus MRP is an advanced ERP solution for manufacturing units/plants, which enables establishments to gain end-to-end traceability of entire plant operations. It streamlines core business functions to optimize manufacturing production scheduling and master the complexities. Dedicated modules for shop floor management, shift management, quality control, maintenance and fixed assets management drive operational excellence with quicker response to customer demands.



Search

↑ Home ➤ Point of Sale Software ➤ Focus POS





Who Uses This Software? All categories which fall under retail segment

### **★** Average Ratings

Overall	****
Ease of Use	****
Customer Service	****

**Review This Product!** 

### Product Details

**Starting** \$30.00/month/ **Price** user

### **1** About Focus POS

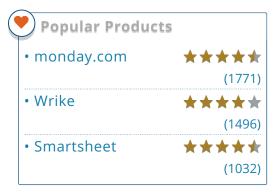
Focus POS (point-of-sale) is a complete ERP Solution, empowering retailers to track purchase orders and payments, manage real-time inventory data, loyalty programs, sales analytics, and more through a unified platform. The software is customizable and is equipped with features like touchscreen UI and multiple form factors for speeding process time. It can be implemented as both a standalone solution or integrate with our software to simplify business operations and deliver an inspired customer e



↑ Home ➤ Task Management Software ➤ FocusMe for Outlook







**Who Uses This Software?** Anyone looking to improve their ability to focus attention on personal & team objectives through the creation and management of projects and tasks.

### **★** Average Ratings



### **1** About FocusMe for Outlook

17 Reviews

Overall

4.5 / 5

Ease of Use

4/5

Customer

Service

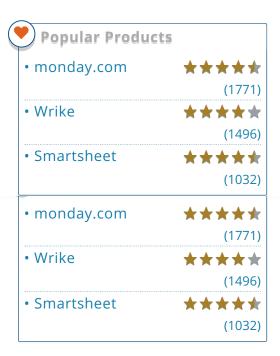
5 / 5

Ceptara's FocusMe application is a Microsoft Outlook 2010-2016 add-in designed to help you and your team achieve greater focus by taming email, organizing action (mail, tasks, appointments, documents, & notes) by project, track time and billing, and facilitate collaboration via email, FocusSync and SharePoint. The tool saves you time and stress by focusing you on achieving your goals.

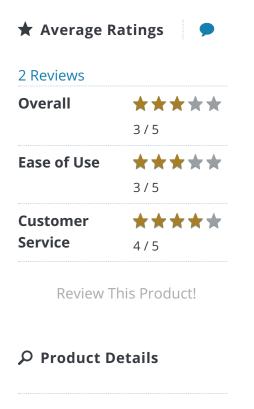
**Review This Product!** 

Ceptara - Introducing FocusMe for Ex...



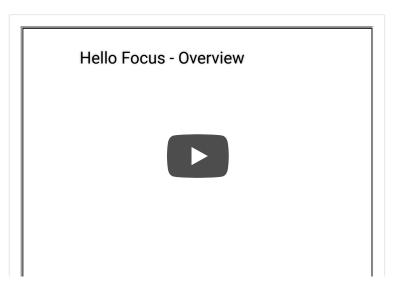


**Who Uses This Software?** For companies in need of product management tools to increase productivity.

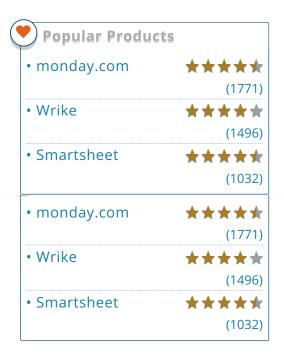


### **6** About Hello Focus

Forever change your work! Built to help you and your team get more done.





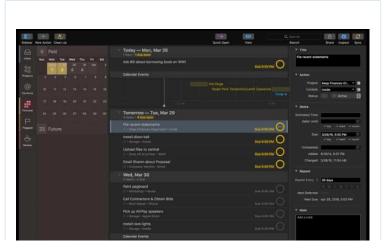


**Who Uses This Software?** For business professionals and students who are looking to organize and track their tasks.

### 

### **6** About OmniFocus

Task management app for iOS with light and dark modes that can display, or "focus on", a selected sets of tasks at any given time.



Product Details

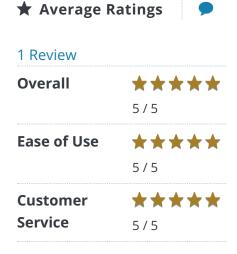


♠ Home ➤ Budgeting Software ➤ Visual Cash Focus





**Who Uses This Software?** Any Business or organisation wanting to produce budget and rolling forecast, profit and loss, balance sheet and cash flows for management reporting without using excel.



**Review This Product!** 

### **1** About Visual Cash Focus

Driver-based Budgeting and Rolling Forecast software Visual Cash Focus integrates budgeting, planning, forecasting, rolling forecasts, consolidation and financial reporting in a single tool. For small to large organisations Visual Cash Focus suits most industry types. The software is simple, easy, accurate and fast and removes the potential for errors inherent in spreadsheet budgeting solutions and is easy to implement.



**Software Categories** 

Search

Home

Restaurant POS Software

Focus Restaurant POS Software



### Focus Restaurant POS Software

by Focus POS Systems

3/5 (9) Write a Review!

**About** 

Pricing

Features

Comparisons

Reviews

Resources

### **Best For**

Focus POS is focused on providing a system that streamlines the processes of a restaurant and giving it access to control labor costs, inventory and more.

### **Product Details**

Formerly known as Restaurant POS Software

Restaurant POS system that manages delivery, table service, kitchen, inventory, and other processes.

### **Company Details**

Focus POS Systems http://www.focuspos.com Founded in 1990

### Table Service Demo



**Software Categories** 

Search

Home

Restaurant POS Software

Focus Restaurant POS Software



### Focus Restaurant POS Software

by Focus POS Systems

3/5 (9) Write a Review!

**About** 

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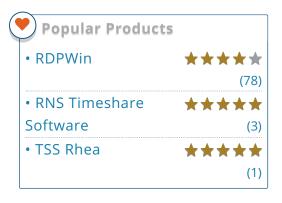
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### Table Service Demo



↑ Home ➤ Timeshare Software ➤ FOCUS





## ★ Average Ratings

# 1 Review Overall 4/5 Ease of Use 4/5 Customer Service 5/5

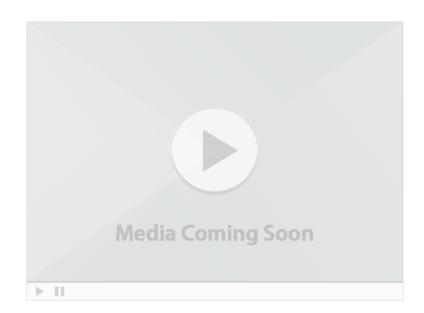
**Review This Product!** 

### Product Details

Starting \$1,500.00/mont Price h

### **6** About FOCUS

CRM solution for timeshare and vacation club sales that helps manage the entire process from tours to escrow.





↑ Home ➤ School Administration Software ➤ Focus SIS





**Who Uses This Software?** Web-based student information management system which assists private schools, school districts and colleges with data and project management.

# ★ Average Ratings 7 Reviews Overall 4/5 Ease of Use 4/5 Customer 5ervice 3/5 Review This Product!

### **1** About Focus SIS

Focus/SIS is a flexible, scalable application that streamlines inefficient processes and offers schools and school districts a 10+ year product lifecycle, ensuring maximum ROI. Focus/SIS is a partner-source solution which opens the source code for collective development among large districts and creates the most flexible platform for data management ever.

sis tutorials focus taking attendance ...

Product Details

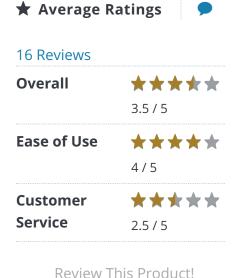


↑ Home ➤ Warehouse Management Software ➤ Focus WMS





**Who Uses This Software?** Warehouses, Supply Chain Industries, Inventory and Logistics



About Focus WMS

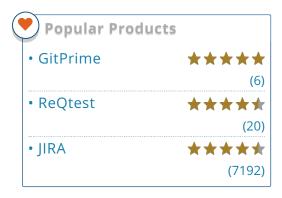
Focus WMS is a leading inventory and warehouse management system with innovative product features to plan and monitor storage, logistic, distribution, supply chain, human resource, and costs. Easy-to-use interface of the software combined with the speed, accuracy, and savings, maximizes logistics performance and fulfilment capabilities of establishments. The dynamic and cost-effective solution enabled with advanced wireless and barcode technology supports complex fulfilment operations

Product Details



↑ Home ➤ Application Lifecycle Management Software ➤ ALM Software





### ★ Average Ratings



### About ALM Software

18 Reviews

Overall

4/5

Ease of Use

4/5

Customer

Service

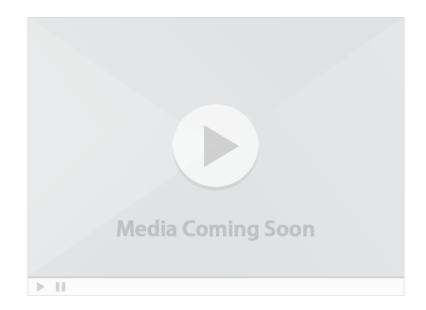
4/5

**Review This Product!** 

### **₽** Product Details

Vendor has not completed this information.

A unified software platform for accelerating the delivery of secure, reliable, modern applications.



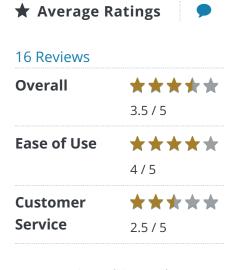


↑ Home ➤ Warehouse Management Software ➤ Focus WMS





**Who Uses This Software?** Warehouses, Supply Chain Industries, Inventory and Logistics



**Review This Product!** 

### About Focus WMS

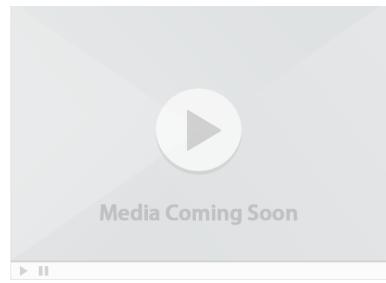
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### Product Details

8/9/2019

**Starting** \$20,000.00/one Price -time Free ✓ Yes Demo Deploym ✓ Cloud, SaaS, ent Web ✓ Installed -Windows **Training** ✓ Documen tation ✓ Live Online ✓ In Person Support ✓ 24/7 (Live) Rep)

Focus WMS Reviews and Pricing - 2019



### **■ Wendor Details**

Focus SoftNet

www.focussoftnet.ca

Founded 1992

**United States** 

### **≡** Focus WMS Features

# Warehouse Management Features ♥

View full list of Warehouse Management Software

- ✓ 3PL Management
- ✓ Barcoding/RFID

- ✓ Forecasting
- ✓ Inventory Management
- Multi-Location
- Order Management
- Purchasing
- Quality Management
- Real Time Synchronization
- Receiving/Putaway Management
- Returns Management
- Shipping Management

### **Focus WMS Reviews** ◀ Recently Reviewed!

Review This Product!

Sort by:

Most Help

Likelihood

to

Recommend



### 'labourous task'

Feb 09, 2019

### viquar j.

Manager order process Electrical/Electronic Manufacturing, 51-200 employees

Used the software for: 2+

vears

Reviewer Source

Source: Capterra

\*\*\*\* Ease of Use \*\*\*\*

**★ ★ ★ ★**Features & Overall **Functionality**  4/5 Customer Support \* \* \* tikely 1/5

\*\*\*\*

Extremely Likely

Money

**Value for** 

**Pros:** copy documents is easy. need to customize the software as per the users . the customize team need to minutely study each user requirement which is not done by Focus WMS Reviews and Pricing - 2019

the Focus team. To implement then again go back to user for review and revise if any short coming.

**Cons:** we need to work old method all entries done by users. Software should display list of all pending things on user screen. user login should know the pending work and once that job completed that entry from pending list should not be there. now user has to search what is pending things or next document he / she has to enter. example The material received so user enter MRN on this screen there should be link to generate Material Issue to Job or Project or delivery note to customer. and software should generate Material issue to job or Project or Delivery note to customer taking all data from MRN. No need for user to enter all the data again in the next document. hope understood the concept.

**Overall:** over experience is user has to enter all data . report are to be provided which actually required in real time work. always the user log in it should display an alert if the due document to complete that job has elapsed.



### 'Focus-Experience-Review'

Feb 08, 2019



**Pros:** I am very much impressed with your ERP customization part and the way you are providing each report as per each entry.

**Cons:** As I mentioned above, I am very interested in customization part of Focus ERP, easy to make or adopt new changes as per our requirement. Likewise your inventory and payroll system is very useful when maintaining project-based costing.

**Overall:** In my 6years of experience with your ERP system, overall it is very good. When it comes to accounts part, I am not fully satisfied with your ERP. It may be because of

### Focus WMS Reviews and Pricing - 2019

my previous experience with the other ERP systems. Also your some customer service agents are not capable of doing new changes in ERP as per our current requirement.



### 'Software Application on Day-to-Day Business'

Feb 05, 2019



**Pros:** The features and the options that the Focus application has

**Cons:** The reporting layouts, the reporting layouts should be able to customize according to the requirement of the users.

**Overall:** Focus as a day-to-day business application is one of the best when it comes to the features and the options that Focus has. I believe it can serve all most all the requirements that a company requires. But the main issue that we as a company facing is the support from Focus team.

So, if the Focus support team can generate a better service, I belive all the users can get the maximum benifit of Focus.



### 'Focus Software'

Feb 05, 2019

### AMIT D.

Finance Dept
Information Technology
and Services, 11-50
employees
Used the software for: 2+
years





8/9/2019

Focus WMS Reviews and Pricing - 2019

Reviewer Source **1**Source: Capterra

Overall Features & Functionality

Value for Money

Pros: Crystal reports, easy to export in excel, lucid modules

**Cons:** Several occasions software generates 2 different reports hence we need to tally many reports manually in excel, during financial closing at the year end the software never carries forward the correct balances.

**Overall:** Decent experience with several pros & cons. Average I will rate 3 out of 5 for the overall experience

### 'My Review'

Feb 08, 2019



**Pros:** Easy to use and manage.doesnt require much investment

Cons: Not many features, poor support and lack of security

**Overall:** Focus WMS is good for small businesses as it is easy to use and manage. For us we need more features but unfortunately not available. Support is very poor and people sitting in support team are not very professional

## 1

### 'Focus WMS Review'

Feb 05, 2019

Likelihood

MANOJ KUMAR J. MANAGER 8/9/2019



**Pros:** IT IS MOST EASY TO USE ,WE CAN SAY USER FRIENDLY Money

**Cons:** SCREEN SIZE FOR INVOICING & VOUCHERS, IT IS DIFFICULT TO CHECK DETAILS WHILE RAISING INVOICES

**Overall:** SOFTWARE IS LITTLE LESS THAN EXCELLENT BECAUSE OF FREQUENT CHANGES IN GOVT LAWS MAKING LITTLE BIT DIFFICULT TO UNDERSTAND BY US



### 'Focus user'

Feb 08, 2019



**Pros:** Ease of use of the software.

Menu driven

**Cons:** Consistence and reliability of the software is not there.

Support by the team is very very bad.

**Overall:** Not great. I have recommended for some other companies, their experience is also reliability of the team is very bad.



### 'Focus ERP'

Feb 08, 2019



**Pros:** Customization in Reports. We can check reports as per our requirement

Cons: Process to upload Bill of Material. We think tht it should be more ease to operate

**Overall:** Overall i think that its a satisfactory system



### 'A Review from Accountant'

Feb 09, 2019



**Pros:** Ease of Use, People without accounting background can easily enter the data and run the reports

**Cons:** Lack of proper customer support, issues with implementation

**Overall:** Inventory Management, Accounts

Focus WMS Reviews and Pricing - 2019



### 'FOCUS SOFTWARE'

Feb 05, 2019



**Pros:** Creating account report and move account from one place to other

**Cons:** Reporting system and inventory report statement of account

**Overall:** user friendly



### 'Focus review'

Feb 09, 2019



**Pros:** This software is very easy and helpful assisting to any accountant

**Cons:** Ledgers and financial statements also journals



### 'Focus WMS review'

Feb 05, 2019

Likelihood

nasir s.

Accountant

https://www.capterra.com/p/71930/Focus-WMS/

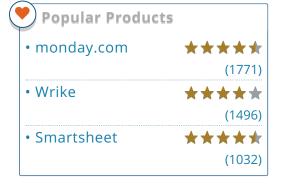


Software Categories Categories
Search

↑ Home ➤ Task Management Software ➤ FocusMe for Outlook



4.5 / 5 17 reviews



**Who Uses This Software?** Anyone looking to improve their ability to focus attention on personal & team objectives through the creation and management of projects and tasks.

# **★** Average Ratings



## **1** About FocusMe for Outlook

17 Reviews

Overall

4.5 / 5

Ease of Use

4/5

Customer

Service

5 / 5

Ceptara's FocusMe application is a Microsoft Outlook 2010-2016 add-in designed to help you and your team achieve greater focus by taming email, organizing action (mail, tasks, appointments, documents, & notes) by project, track time and billing, and facilitate collaboration via email, FocusSync and SharePoint. The tool saves you time and stress by focusing you on achieving your goals.

**Review This Product!** 

Ceptara - Introducing FocusMe for Ex...

8/9/2019 Product Details **Starting** \$4.00/month/u Price ser Yes Free **Trial** Deploym ✓ Installed -Windows ent **Training** ✓ Documen tation ✓ Webinars Support ✓ Online **■** Wendor Details

FocusMe for Outlook Reviews and Pricing - 2019

Ceptara
www.ceptara.com/
Founded 2002

**United States** 

# **≡** FocusMe for Outlook Features

# Task Management Features ✓ Collaboration Tools ✓ Create Subtasks ✓ Gamification ✓ Gantt/Timeline View

- ✓ Mobile Access
- ✓ Percent-Complete Tracking
- Recurring Task Management
- ✓ Reporting/Analytics
- Spreadsheet View
- Task Board View
- ✓ Time Tracking
- ✓ To-Do List View

# **P** FocusMe for Outlook Reviews ◀ Recently Reviewed!

**Review This Product!** 

Sort by:

Most Help ▼



# 'Excellent Software'

Jul 15, 2016



**Pros:** The feature set is extremely comprehensive. It really **Indiasy**me to stay on top of the many projects that I handle. The trouble free synchronization with Pocket Informant makes this software a keeper.

**Cons:** I must admit that I am not fond of the yearly billing, but I suppose that is the wave of the future. The earlier versions of FocusMe were quite buggy, but now the kinks have been largely worked out of it.

**Overall:** It requires a bit of a learning curve to learn how ot use the software to its fullest. It is the only solution that works with Outlook, GTD, and Pocket Informant.

**Recommendations to other buyers:** I would love it if you would offer your custormers discounts for signing up for multiple years. This will certainly encourage you loyal customers to support your software for years to come.



# 'Most Comprehensive Outlook Add-In'

Aug 19, 2016



**Pros:** Inexpensive

Comprehensive

Flexible

**Cons:** Waiting for Office 365 SharePoint links (coming)

Outlook tries to disable it because of load times (but its worth it)

**Overall:** Have been experimenting with multiple software packages that allow me the ability to incorporate the disciplines of Getting Things Done, Lean, Covey and Microsoft Project in an Outlook add-in. This is the only one I have found over the last ten years that actually works.

**Recommendations to other buyers:** The price makes it worth it beyound the thirty day free trial (I usally do not get around to a comprehensive evaluation in thirty days). The developer is very responsive and customer oriented, so play with it untill it suits your needs.



# 'I Love This Tool!'

Jun 23, 2016



**Pros:** Project alignment of tasks and calendar items. Processing mail into the 5Ds (Do, Delegate, Delete, Defer, and Drawer/File). Tracking of time and effort for generating client bills and knowing where you spend your time.

**Cons:** Not very compatible with my Android phone apps, but workable.

**Overall:** Easy to install. Once installed, allowed me to manage my life in projects that represent how I sub-divide my time.

**Recommendations to other buyers:** I wasn't an advocate at the outset. You do need to adapt to the processing model, but it's well worth it.



# 'Best add on ever!'

Aug 04, 2016



**Pros:** I love the ability to stay organized with all of the email I receive. It is so easy to drop the ball on an item if you do not have a system to keep you organized. Customer support is the best I have ever experienced with any software product.

**Cons:** If there is a crash outlook will automatically disable the add in.

**Overall:** I have been using Ceptara software now for several years now and I cannot imagine working without out it.



# 'Organization! Stay Focused!'

Oct 31, 2018



**Pros:** FocusMe really really helps us! We can stay on top of all of our tasks and projects easily. Prioritize tasks, track billing time, etc. I feel more focused using it! This is definitely the future.

**Cons:** Nothing really to not love except the price of course, that you have to pay all at once: no monthly billing.

**Overall:** I feel more productive and everyone at our company loves it!

# **→**Vendor Response

by Ceptara on November 03, 2018

Mike - thanks for the review. We haven't set up monthly subscriptions (just haven't done the back-end work yet). I will prioritize it higher. Thanks for letting us know.



# 'Good addon's for your outlook.'

Mar 27, 2019

Likelihood

### mohit S.

Sales manager Computer Software, 1-10 employees



Pros: Small addon's but very featured and food time altry sive. Water Sovith outlook 2016 perfectly to manage all your emails, payments, bills, tracks. When albility to move all your notes and tasks with calendar is really useful for those who have lot of meeting in a day.

**Cons:** there are few points we can consider while using focusme.

- \*\* Still No support for office 365. \*\*
- \*\* no monthly billing system you have pay once \*\*

**Overall:** I am mainly using focusme for my tracking system via email. and this does good work for me.



# 'A must for any MS Outlook user'

Dec 29, 2016



**Pros:** The ability to easily move tasks around the calendar and the organization using projects.

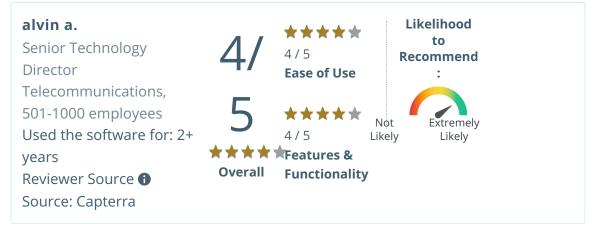
**Cons:** Initial set up was a little rough and upgrades to the product or Outlook have not always been smooth.

**Overall:** I've been using this software for a number of years and it keeps me on track. If you are looking for a good time/task management tool, this is it.



# 'Senior Technology Director'

Jan 15, 2019



**Pros:** helps me in organizing my work/to dos. it helps me focus on the most important thing to follow-up on.

**Cons:** i wish it would work on a Mac. I wish it became a 'standard plugin' so my company's desktop group would support it/me.



# 'Essential, Excellent, and beats all the competitors.'

Sep 18, 2018



**Pros:** Well-conceived and well-executed, it is an excellent piece of work and great value.

Cons: Slows down startup of Outlook, but not enough to make me not want to use it.

**Overall:** Excellent



# 'Been a raving fan for years. Wrote a book on time & this is how I measure my time!'

Jun 17, 2016



Pros: Dynamic and super easy to use

Cons: Wish it was on more than Outlook platform and on my iphone

**Overall:** I am a time management expert and this IS the daily tool I utilize to measure the effectiveness. Can't recommend it highly enough



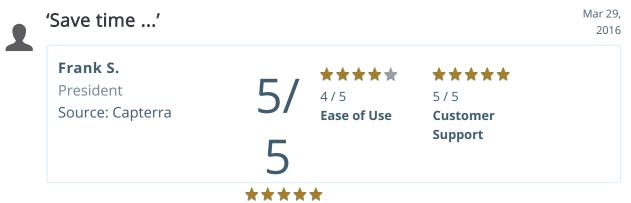
# 'General Review 1 Sept 2016'

Sep 01, 2016



**Comments:** I use only a limited set of the many capabilities, but I positive benefit from the parts that I use.

**Recommendations to other buyers:** Please try to reduce the frequency of review requests:-)



Comments: The product saves Pretialle!

Zero inbox (5D) email is a great concept that is facilitated by the Ceptara tools. This enables categorizing, filing and converting email to calendar events with a right mouse click.

Using the project features, project time, mileage traveled and time cards are all facilitated in Outlook. Simple to use features enable Outlook information to be exported to .CSV so that invoice backup can be generated as well as travel expense reports.

Support from Ceptara has been outstanding. We had software issues due to operating system and Outlook version upgrades and these were quickly handled.



# 'Great flow and design. Limited by Outlook framework (I suspect). Hangs periodically.'

Nov 26, 2017



**Pros:** Functionally, it seems to do everything I would want it to do. It follows the GTD methodology nicely. E.g., supports the concept of projects with multiple steps; allows me to set up tasks under projects. Allows me to move emails to tasks or calendar items. Allows me to move tasks to calendar items, etc.

**Cons:** It is client-side software though Outlook is morphing to web app.

1. It regularly hangs and is periodically disabled by Outlook as a misbehaving add-in.

**Overall:** ability to use implement disciplines of getting things done methodology in Outlook.

# **→**Vendor Response

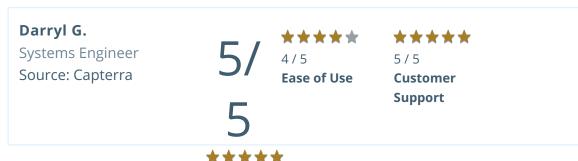
by Ceptara on November 27, 2017

Jim - thanks for the review. Agree with your observations. We're moving more to the cloud and are heading to better integration with OWA and other Office cloud services (e.g. Teams). thx Chris



# 'Making EMail functional'

Jun 07, 2016

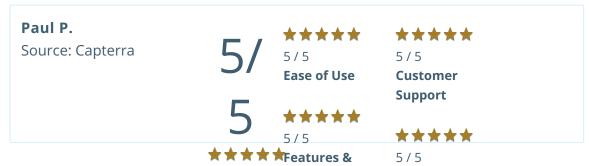


**Comments:** Using FocusMe has when we meet the opportunity to take my email to the next level. No longer do I have email sitting in my inbox for weeks on end and i have to take time out to archive, move or respond only to find out that I need to find that message for some reason later. FocusMe is that one tool that every MS Outlook user should have so that you can take control over your email and not the other way around. Tracking, Archiving, Inbox cleaning are just a few of the features that FocusMe provides. This addon is a must for every user and not just the corporate power user.



# 'Unparalleled project and activity tracking MS Outlook'

Dec 16, 2016



**Comments:** A few years ago I for the cust meeting all took -value for this day, I continue to enjoy using the software because without question, its all repeto organize and track time-related to the myriad of projects I manage is simply unrivaled. This software will change the way you work and provide you with operational tracking capabilities you never dreamed possible within your MS Outlook calendar! I particularly like the 'Time Card' feature that lets me extract and summarize project data from my calendar.



# 'Does pretty much what I want it to do'

Jul 27, 2017



**Pros:** I like the ease of creating tasks by category and I like **therfag**t that syncronization with my mobile devices always works.

**Cons:** I do not like that I have to save a task before I can link it to a category.



# 'Tried them all for years.... nothing else comes even close to FocusMe for Outlook'

May 10, 2016

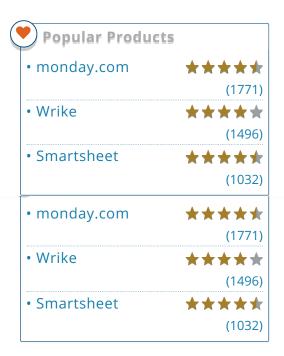
Robert L.	
CEO	



**Comments:** The built-in functio Parky I bower, and capabilities can be a real life-changer in terms of organization, access to data, and powerful processing of personal management data.

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in y A			Select your country:
			Select your country:





**Who Uses This Software?** For companies in need of product management tools to increase productivity.

# Average Ratings 2 Reviews Overall 3/5 Ease of Use 3/5 Customer Service 4/5 Review This Product!

# **1** About Hello Focus

Forever change your work! Built to help you and your team get more done.







ent	Web
Support	<ul><li>✓ Online</li><li>✓ Business</li><li>Hours</li></ul>

# **■ Wendor Details**

Hankinson Consulting

hellofocus.com/

United States

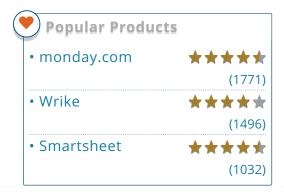
# **≡** Hello Focus Features

# Task Management Features ➤

View full list of Task Management Software

- Collaboration Tools
- Create Subtasks
- Gamification
- ✓ Gantt/Timeline View
- Mobile Access
- ✓ Percent-Complete Tracking





# 

View full list of Product Roadmap Software

# Scheduling Features **<**

View full list of Scheduling Software

■ Hello Focus Reviews 

Recently Reviewed!

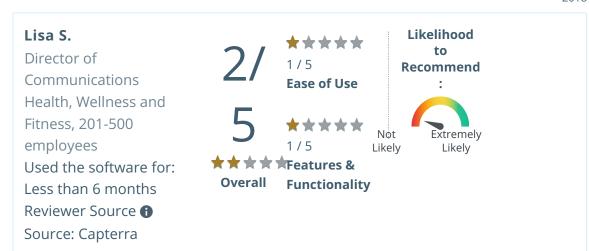
**Review This Product!** 

Sort Most Help ▼



# 'buggy'

Dec 13, 2018



**Pros:** would love it if the features actually worked

**Cons:** can't get it to add tasks, no matter what platform i'm on, pop up blockers blocked, etc. Even sent a video to the developers, who didn't believe me that they



**Comments:** Hello Focus helped **Qweralb** in **Functionality** am **walk pfon** nification. It is a verry good tool to increase the eficent usage of time at wor**!!!oney** 

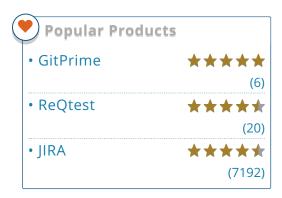
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# **★** Average Ratings



# About ALM Software

18 Reviews

Overall

4/5

Ease of Use

4/5

Customer

Service

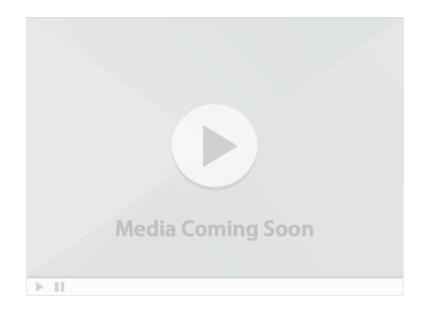
4/5

**Review This Product!** 

# **₽** Product Details

Vendor has not completed this information.

A unified software platform for accelerating the delivery of secure, reliable, modern applications.



## **≡** ALM Software Features

# Application Lifecycle Management Features ♥

View full list of Application Lifecycle Management Software

Vendor has not completed this information.

# **■ ALM Software Reviews** • Recently Reviewed!

**Review This Product!** 

Sort Most Help ▼

# Decent tool, but versioning could use some mprovement and it is hard to work with branches.'

Apr 11, 2018



**Pros:** I like that it is a single repository for all requirements, test cases and test executions and maintains good trace records for reporting and audit support. Being able to customize workflows is a big plus that we use quite a bit. Like that our automation tools are able to connect directly(-ish).

**Cons:** Hard to generate verification reports that trace a requirement to a test case to an execution (without SQL queries). Even worse if you have multiple branches of the same code base that are based off the same requirements library. The versioning needs some work as does the interface. The interface can be pretty buggy at times and the user experience is not consistent with current technology. Reporting tools could be simplified and expanded.

Mar 31,

2018

sophisticated tool for project deliverables'

### aanchal v. in a \*\*\*\* **Business Technology** 4/5 **Analyst** Ease of Use Customer Management Consulting Support Used the software for: 2+ \*\*\*\* vears ★ ★ ★ ★ ★Features & 4/5 Reviewer Source 1 Overall **Functionality** Value for Source: Capterra

**Pros:** This software has a wide variety of features available for tracking and maintaining the entire software development cycle. My experience has mostly been related to the testing cycles, the tool provides users the ability to keep track of the testing scenarios being performed and then reporting any detected defects. The users can also attach the evidences associated to the defects for the development team to access.

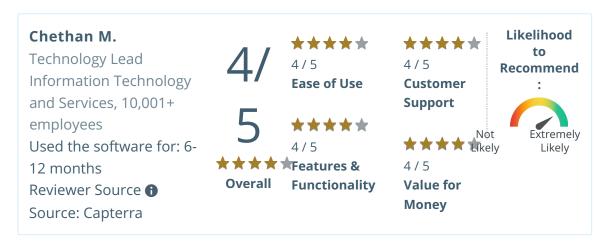
Money

**Cons:** The only thin that I did not like about this product is the filters available. Instead of providing the plain check-boxes for the user to select filters, this tool provides functions like AND, OR, NOT to append the filters. That is the only feature that I find a little awkward to use.



# 'HPE Application Lifecycle Management is a great tool to manage application lifecycle from end to end'

Dec 12, 2018



### ALM Software Reviews and Pricing - 2019

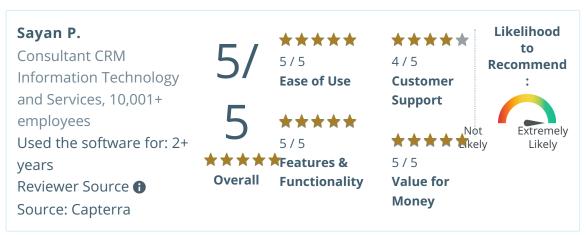
**Pros:** HPE ALM is a very popular tool used across for Software Testing. HPE ALM has some nice features like Configurable dashboard, WYSIWYG Editor to capture the data, Options to upload supporting documents, Capture or Raise Defects, send notification emails, filters and search options and many other features. HPE ALM is a easy to use tool for testers to capture test related documents, requriements, schedule the tests, capture the test results, raise defects with different Ids, severity, categories. The nice part is the responsive Web view of the HPE ALM which allows the tester or developer to just right click and perform the tasks.

**Cons:** HPE ALM overall is a good tool but it has its own disadvantages. HPE ALM is a paid tool that involves a cost. HPE ALM unlike other softwares is just not directly the web version but one need to install the Thick client in their respective systems and then only can access the web version. The web version again need some time gap for the users to get access based on the relevant DBs or Categories inside large organizations. HPE ALM is certainly not very easy to use, One need to have little learning curve and need to customize the HPE ALM dashboard to start using the tool.



# 'Best available Test management tool in the market'

Oct 30, 2018



**Pros:** Best available project management and test management tool available in the market. You can customize the tool as you want. Test case management and requirement management has been made easy because of this tool. Defect management is also very good.

Reporting is also very good.

You can write SQL code for advanced search.

### ALM Software Reviews and Pricing - 2019

**Cons:** For the project that follows Agile methodology, JIRA is better. JIRA has better functionality when SCRUM and KANNABAN is concerned.



# 'A long time users review'

Dec 05, 2017



Comments: This tool is an industry standard in the SDLC

**Pros:** The linking of defects to test runs is excellent. Any changes in mandatory fields or status of the defect triggers an e-mail and sent automatically to the user that the defect is assigned to. Also, ALM is considered to be an excellent auditing tool.

**Cons:** It's an awesome tool but it has one small issue: it takes a long while in the initialization process and a delay is noticeable when an incorrect password is entered during signin process.



# 'Expensive but does a good job at application life-cycle management'

Dec 11, 2016



Pros: Good UI.

Easy to track history,

Good option to provide access based on roles

Cons: Certainly the cost,

Support need improvement,

delay in response,

Can't open another window,

Can't copy & paste some repetitive tasks

Overall: I have used this tool basically for testing management. It comes with userfriendly UI, look & feel. Gives you complete control over tracking all stages of testing i.e. requirements, test case design, test execution & defects management. Easy for requirement tracking alongside test case so you can know how many test cases were written for each requirement very quick. Once u put test cases in test plan you can pull same any number of times in Test lab. Has a good screenshot tool.

On the other side, it comes with high cost. Connections to third-party applications are not that easy

**Recommendations to other buyers:** The tool has pretty high cost so unless you wanna use most of its features don't go for it. But if you really have huge requirement & need something which will manage everything



# 'A tool for Trace-ability and ticketing at its best'

Apr 01, 2019

# Raghavendar N.

Sr. BI Consultant Information Technology and Services, 10,001+ employees







Not



https://www.capterra.com/p/174868/ALM-Software/



**Pros:** ALM can be used or customized to fit the business need. It is web based and has a lot of features. It has option of Dashboard to see the high level details about the business PALM. We start the project by capturing the requirements in the requirement menu and trace them with DFUNCs. We can attach the document related to the requirement, pass the necessary comments for the team who process them etc. It has all that is needed in one place.

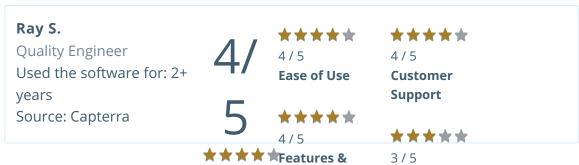
**Cons:** Some features confuses the user and the look & feel has a room for improvement. The help option is not very helpful.

**Overall:** I have used ALM in two different ways, when I was with different client. At one client, it was used by QA team for tracking the defects and at other it is used for document and version trace-ability. In the first case, it has good features and options for QA team to create the test cases and trace them, attach the artifacts, document about details. It gives the summary in a very defined way helpful for everyone. At second client, we use this for tracking the DFUNCs right from BRD to the low level design



# 'Robust tool that allows BA/Dev/Testing to effectively manage software.'

Jun 27, 2017



Pros: Requirements, Test Plan a വെട്ടെ Latuaceiomastry sed Madde fos.

Money

Reporting is also easy to use and powerful - to get custom queries as needed.

ALM Software Reviews and Pricing - 2019

**Cons:** Don't particularly use the Defects area - find that JIRA works well in an Agile environment and for our needs



# 'One of the best defect tracking tool'

Jan 30, 2017



Pros: Ease of use

**Overall:** HP ALM is one of the best defect tracking tool. It is easy to use. User can create, update, relate tickets. UI is good. We can track updates, helps in doing root cause analysis.

# 'Clunky Test Tool'

Mar 26, 2019



**Pros:** I like all the functionality surrounding testing in ALM--writing tests in Test Plan, running tests in Test Lab and the Defect module works well. You can have requirements housed in ALM too and then link your tests right to them.

### ALM Software Reviews and Pricing - 2019

**Cons:** It is difficult without the help of a system admin to set up your project and while it does have powerful reporting tools, it is difficult to use them and there is no flexibility in generating requirement tracing automatically.

**Overall:** I use ALM everyday for testing activities, documentation generation and requirements editing. It only works on IE, which is the slowest browser and has the annoying habit of auto logout that is non configurable. It doesn't save automatically and there are bugs in which you lock yourself out of a record you need to edit. Most people in my company can agree on how clunky this piece of software is.



# 'The perfect ALM for Agile products'

Nov 17, 2017



**Pros:** Complete Tracking with all features. Simple and Easy to use. Exporting feature makes this product unique among other products.

**Cons:** It is highly dependent on internet explorer. we cannot use this product effectively on chrome and Firefox . This is the only the problem I faced.

**Overall:** Its a well built software without bugs. and the functionalities in this software are completely enough for an IT company of any size.



# 'ALM Software'

May 31, 2019

Likelihood

### **Verified Reviewer**

Banking, 1001-5000 employees



Pros: A multi-functional applica (Pyrenth) at weunseignality soft Wated €sting processes. In our company we use test case for run and defect.

Money

**Cons:** It is not very practical to use because the application is multifunctional

**Overall:** In our company we use test case for run and defect.

# **≯**Vendor Response

by Micro Focus on June 10, 2019

I wanted to say thank you for your feedback regarding Micro Focus ALM. Your comments are a little vague, but when we hear feedback like yours it often points to either the solution being more than required or there is a need for training. I'd really appreciate hearing more so that we can improve your experience with Micro Focus.

You can email me or contact your local Micro Focus representation; and you'll find some information on ALM training here: https://marketplace.microfocus.com/education

We look forward working with you.



# 'Overall Satisfaction with HP Application Lifecycle Management'

Dec 15, 2016



### ALM Software Reviews and Pricing - 2019

**Comments:** Keep track of project requirements and review definement coverage and fulfillment with relation to test cases executed. In HP ALM yellow easily review the project requirements and assess the current status by looking at passed and failed requirements based on the execution results of the test cases linked to these requirements.

Execute test cases and keep track of the execution - HP ALM can track both Manual and Automated tests (with the help of HP UFT). Test cases can be easily organized and assigned to testers, then the actual test execution can be tracked in HP ALM where testers will pass or fail individual and detailed steps of the test cases in HP ALM. From here you can generate real time reports on test execution, on testers, or on tests executed by day etc.



# 'A great product that needs a bit of polishing'

Jan 09, 2017



**Pros:** UI, Reports, and overall app experience

**Cons:** Report generation needs some level of coding and support.

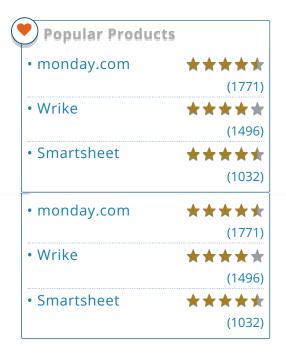
Price isn't it's strong point

**Overall:** The overall UI experience is a good one. It's quite easy to track applications and it has a lot of options with great "customer-oriented" reports.

What needs to be improved:

- 1. The Windows desktop client
- 2. Support



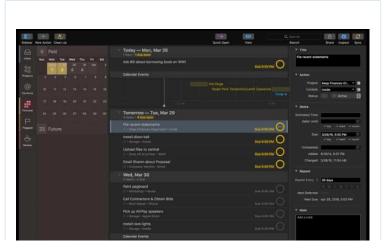


**Who Uses This Software?** For business professionals and students who are looking to organize and track their tasks.

# 

# **6** About OmniFocus

Task management app for iOS with light and dark modes that can display, or "focus on", a selected sets of tasks at any given time.



Product Details



Popular Products	
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	(1032)

# **■** Vendor Details

Omni Group
www.omnigroup.com

Founded 1993

# **≡** OmniFocus Features

# Task Management Features **▼**

View full list of Task Management Software

- Collaboration Tools
- Create Subtasks
- ✓ Gamification
- ✓ Gantt/Timeline View
- ✓ Mobile Access
- ✓ Percent-Complete Tracking
- Recurring Task Management
- ✓ Reporting/Analytics
- Spreadsheet View
- Task Board View







# 'Powerful and Versatile Task Management'

Jan 08, 2019



**Pros:** Omnifocus allows me to structure my tasks and projects virtually any way I want and then filter them so that I only have to see what I want to see, when I want to see it. This cuts down on the confusion and overwhelm and has made me a much more productive human being.

**Cons:** I honestly have no complaints. However, I do have a couple of caveats.

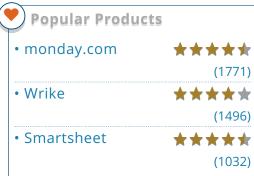
1) There is a learning curve.

As with any application that offers so much power and flexibility, OmniFocus is more complex than one might expect at first.

2) You need to have your own task management system.

Omnifocus was originally designed as an implementation of David Allen's Getting Things Done system and it still works beautifully for that. Changes over the past few years (most notably replacing Allen's "contexts" with "tags") have opened up ways of breaking out of the strictly GTD framework.





in the near future, and what long-range plans and ideas I have percolating in the back burner. Tony Stark has Jarvis. I have OmniFocus.



# 'Best personal task / GTD manager if you are full into Apple ecosystem'

Mar 30, 2019

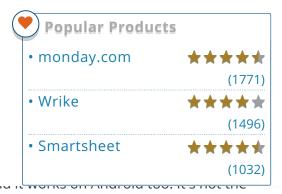


**Pros:** It is not more than a task manager for macOS and iOS, but it's built in its own mindset. People either love it or don't understand it. It was originally the first application that was officially GTD® "acknowledged" (not certified because there is not such thing).

If you are into GTD, there are some little gems that are difficult to find in other softwares:

- Defer date: action is unavailable until then
- Review perspective: a view specifically to make the "weekly review" easier, it lets you go through every project to review its associate actions
- Review every date: if you are an advanced practitioner, there will be projects that you want to review more often; you can set some projects to be reviewed daily while you





most usable interface but can save your day.

# 'The second best task management software'

Mar 05, 2019



**Pros:** - Feature-rich app, allows you to control almost every aspect of your tasks

- Maybe the best task management software suite for handling complex projects
- iOS companion app
- Web service allows you to access most critical functions when on the go (or working from a different platform)
- If you often have to manage complex tasks projects, OmniFocus is well probably the best choice
- They recently added tags!





### - Pricey

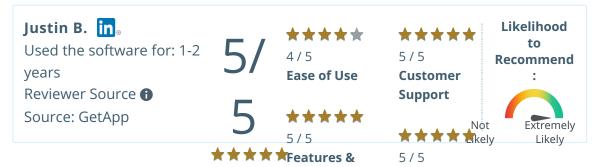
**Overall:** Well, I used OF for good two years (Pro version) and while it served me well, I ultimately found that the way OF implements task management is too focused to micro-management.

When OF3 came out I was torn between going ahead and embrace my fate (!) or move along and look for another option. Eventually, I switched to Things 3 and never ever looked back:)



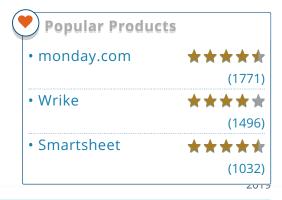
# 'This is how I plan my day!'

Oct 24, 2018



Pros: Omnifocus is a very powe free where we managion this pack and four features however the app is designed in such a way that you can use as many of the features as you wish. It is infinitely customisable. It's easy to create projects, tasks, and folders and to assign them tags, due dates, make them repeat etc. Tags is my favourite feature. Each task can be assigned many tags. Tags could be things like "Mac computer" or a location or an energy level. When you want to look at your tasks you can filter them with these tags. On the iOS apps you can set location based alerts for your tags too. Syncing is automatic and very reliable through Omni Group's omnisync server.







**Pros:** This piece of software includes all you would ever need to stick to a strict GTD regiment. It is by far the most complete task manager I have tried out.

For tasks, it allows the user to set time-requirement, due date, defer date; and for the projects, nesting, and sequential or arbitrary task execution. It has iCal integration, and reminders for weekly review (with a separate page tailored to that activity). Not to mention the custom Perspectives option that the paid version offers to the user, which opens up a world of possibility in controlling the way the data is interacted with.

**Cons:** The learning curve is non-trivial. If you are not going to use this for a serious GTD workflow and/or are not ready to put the time and love in learning it, then this software is not for you.

Another gripe I have with the Omni Group is that they are not very open to third-party integrations. OmniFocus exposes an AppleScript API, but the functionality is limited. This means that you won't find many exciting IFTTT or Zappier integrations.

**Overall:** I swear by OmniFocus. It is a central part of my workflow chain. If you are a believer in GTD, this is the app for you!



**Pros:** Other to-do apps simply don't have the width and breadth that OmniFocus offers. I can set up my to-dos and group them into projects and folders, so I can differentiate between client work and work on my own business as well as between the different clients and the different projects I'm working on for them. The possibilities are endless!

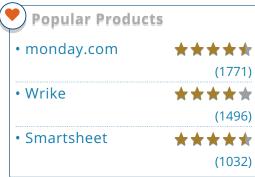
**Cons:** It does take a bit to get used to and the user interface is practical but could be more intuitive (there's a new version coming up later in 2018 so that might get better then). I also miss a feature to calculate availability/capacity. There's already a field for the duration of every task, why not go the next step and tell you how much time you've got already allocated that day, week or month.

# "Literally my number one favorite application - an absolute lifesaver"

Nov 05, 2018







Custom perspectives are highly recommended, and for them, I would always purchase the pro edition. If you are serious about personal task management, this is the last software purchase you'll need to make.

# 1

#### 'The Task Manager That Will Save Your Life'

Jun 26, 2019



**Pros:** As a graphic designer working with multiple clients at any given moment, OmniFocus helps me stay organized and focused on the most important things. It is incredibly powerful and customizable, allowing me to adapt it to the way I work instead of the other way around.

**Cons:** Even though I'm very familiar with the software now, there was a little bit of learning curve when I first started. Because it's so customizable and adaptable to your needs, there's no right way of doing things. I wish I would have figured that out sooner!

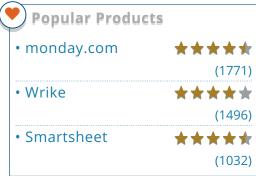


#### 'Feature rich, yet missing some critical things'

Jul 26,

2018





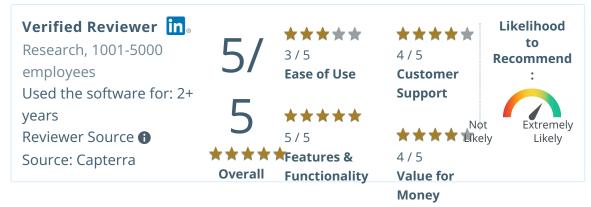
really rollow the Getting Things Done (GTD) methodology or context and prioritizing. Like the ability to embed outside calendars in the task views.

**Cons:** I found it a bit much for me to try to fully manage a GTD system and ended up using only more basic features. It also doesn't offer ANY functionality for teams and sharing projects/tasks. Since I need this for one my jobs - it was out, and I like to have consistency between different work projects if I can so I'm not running on multiple software where necessary.



#### 'The Best GTD'

Oct 24, 2018



**Pros:** OmniFocus is the best and the most powerful GTD software that I have used. Especially in the OmniFocus 3, the tag (replace the context from OF2) and the great iPhone app can help me tag anything, including places and contacts and so on, and keep track with everything.

**Cons:** The software is very hard to get used of it, not friendly for new users, not enough tutorial included.

**Overall:** I love working with OmniFocus and the extendability it has. I used some scripts to help me keep track of my assigned issues on Github. It can auto sync data



**Pros:** It has more features than any task manager I've ever seen. You can get amazingly granular with different views, settings, "perspectives," reminders, etc. It has every bell and whistle you can think of.

**Cons:** My experience is that it was a little "too much" for me, but I know certain people love it. I felt like I was spending more time tinkering with my tasks than actually doing them. It's hard for me to get behind all the tweaking, especially when multiple billionaires say that they make their to-do lists on a sheet of paper. I also think it's overpriced.

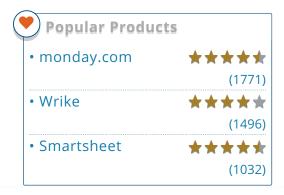
**Overall:** To me, omnifocus over complicates tasks. I would say if your life is regimented down to the minute and you have hundreds or thousands of to-do items, then omni focus might be a fit for you, but then, you probably also have a personal assistant. A task manager is all about personal preference, and I lean toward something simpler.

#### 'Powerful Task/Project Organizer'

Nov 29, 2018







gi cac.

**Cons:** It took me a long time to really understand how powerful Omnifocus is (and I still don't think that I have taken advantage of all of its features, even though some of them may be applicable to me). So perhaps it could be slightly more user-friendly in that respect.

Overall: Amazing!



#### 'OmniFocus - You Need It'

Sep 19, 2018



**Pros:** I love OmniFocus. It is the lifeblood of my ability to get things accomplished. It is easy to use, to organize your tasks, to ensure you stay focussed, and can be productive. It also synchs well between the desktop version and iOS version.

**Cons:** Absolutely nothing. Once you wrap your head around the Getting Things Done paradigm you will love this product.

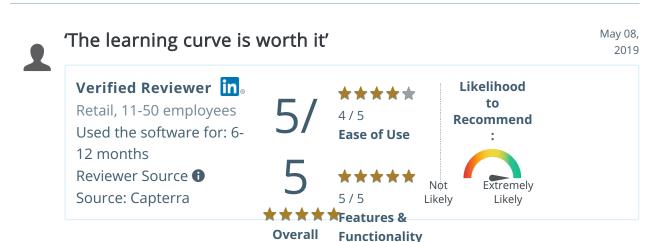
Overall: Outstanding experience. Buy this, upgrade it, use it!



**Pros:** This software can literally do anything related to managing your daily tasks. You can build outlandish project and folder hierarchies or keep a few projects around. It scales to any use case easily once you finish the learning curve.

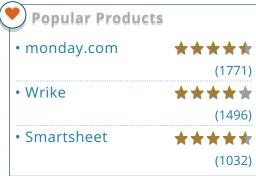
**Cons:** It can be daunting to try at first because of how much this software can do.

**Overall:** OmniFocus has changed my task management strategy and I cannot use any other system now because of how scalable and powerful this system is. Amazing product and customer service/support.



**Pros:** Robust! Multi-faceted and full featured. Omnifocus now helps me manage many aspects of my personal and professional life. Being able to manage tasks across platforms is a huge plus for me. This is a project management app that helps you reach your full potential.







#### 'Great for complex project and task tracking'

2018



**Pros:** Has every feature you could think of. Seamless integration across multiple devices. In the Pro version, allows full customization and automation using AppleScript.

**Cons:** Mac-only (not a problem for me but probably a limiting factor for others). Learning curve is steep, which keeps me from using it as much as I probably should. It's expensive, particularly in the Pro version.



#### 'Great Tool to Stay Organized and Productive'

Dec 08, 2018









**Pros:** Simply the best task manager I have ever found. Syncs well across all drviced

Cons: It has more features than I need, but I Judith ignore them

**Overall:** Excellent

# 2

#### 'Best GTD App'

Jul 09, 2019

#### Mathias B.

Marketing Consultant
Marketing and
Advertising, 11-50
employees
Used the software for: 2+

years
Reviewer Source 1

5/ \*\*\*\*\* 4/5 Ease of Use



★★★★★ 5/5 Value for Money



Likelihood







#### 'A wonderful approach to getting things done'

Apr 24, 2019



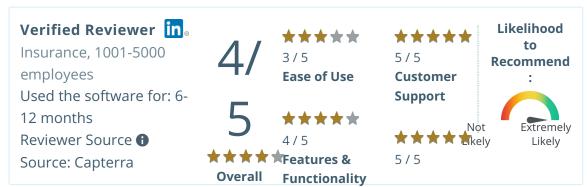
**Pros:** I can manage many different projects at once with Omni Focus. The best part is the cross platform capability. I can manage my tasks from my phone, watch, tablet or computer.

**Cons:** I think the organizational structure could use a little work. I manage many different projects and this is the best product for that but being able to run it as entirely different instances would be helpful.

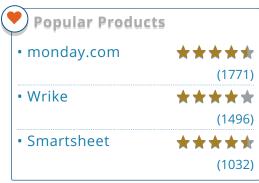


#### 'Best task management app I've ever used'

Jan 15, 2019







- Omnifocus is like a blank canvas, requires you to have a clear idea of what your own trusted system is and how it works

#### 'Robust solution'

Jan 13, 2019



Pros: It has all the functionality you need to manage tasks and projects. It's the top of the line when it comes to task management.

**Cons:** It can be overkill and the learning curve is higher than more simplistic solutions, but not overly so.

Overall: I really enjoy OmniFocus. There's nothing that I've ever wanted it to do that it can't.



#### 'My Go To Tool to Getting Things Done'

Dec 04, 2018

Likelihood

Verified Reviewer in





Quick Entry, allows me to quickly create tasks from anywhere on your Mac

Folders and projects to help organize tasks

Customizable views

Mail app integration

Cons: I do not use these features much

time estimates, repeats for your tasks and projects

**Overall:** OmniFocus allows you to quickly capture your thoughts and turn them into actionable tasks.

OmniFocus's intuitive and customizable interface provides you with the tools needed to organize your tasks into manageable actions.



#### 'Great Task Management app'

Jan 04, 2019











**Pros:** OmniFocus allows a granularity of task management that is unparalleled. It is remarkably straightforward in doing so, too.

**Cons:** Unfortunately I'm required to use a PC at work and was unhappy only managing my tasks on my phone.

**Overall:** OmniFocus is an utterly fantastic solution for people who want the level of detail it offers. For other personality types, though, other options might be better.



#### 'Very powerful, but too many features'

Oct 23, 2018





**Comments:** I researched and tried just about every task management app there is. This was the only one for OS X / iOS that fit all of my needs. I have become extremely dependent on it. I probably only use approx 25% of its functionality, but that's plenty for me. The biggest pro for me is the ability to forward emails to the app.

**Pros:** Ability to email tasks to the app and have them show up in your task inbox, Multiple fields for prioritization/contexts/filtering, ability to create custom views (called perspectives)

**Cons:** They really, really need a way to prioritize via drag and drop. That's the only con, but it's a huge one









Liz T. in<sub>∞</sub> Likelihood \*\*\*\* \*\*\*\* to Senior Operations 5/5 Recommend Manager Customer Ease of Use Internet, 51-200 Support employees \*\*\*\* Extremely \* \* \* \* kely Used the software for: 2+ 5/5 Likely ★ ★ ★ ★ Features & 5/5 years Overall **Functionality Value for** Source: GetApp



2017 Likelihood \*\*\*\* to Recommend Customer Support Extremely Not ★ ★ ★ ★ kely Likely

Volker R. in 8

angestellt International Affairs, 10,001+ employees

Used the software for: 2+

years

Source: GetApp

\*\*\*\* **Ease of Use** 

5/5 **★ ★ ★ ★**Features & Overall **Functionality** 

5/5 Value for Money

3/5

Money



Aug 17, 2016

Likelihood

Jan 13,

Jacob T. in .

Used the software for: 2+ years







2016





Mar 16, 2016





Jan 01, 2016

Joe C. in Director of Product

Development





1

Tucker W.

Construction, 1-10 employees

Reviewer Source 1

Source: GetApp

5/

5

\*\*\*\*

**Overall** 

1

Feb 04, 2019

Jeanette S. in s

Product Owner Hospital & Health Care, 51-200 employees

Reviewer Source 1

Source: GetApp

5/

5

★★★★ Overall



Oct 12, 2018

Anton N. in s

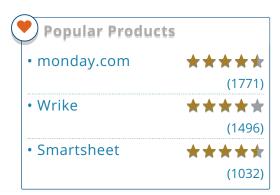
Reviewer Source 1

Source: GetApp

4/











Tobias M. in

Software Developer Information Technology and Services, Selfemployed

Reviewer Source 1

Source: GetApp

5/

**5** 

Overall



Nov 04, 2017

Mar 03, 2018

Enrico G. in s

Docente in Digital

Strategy

Marketing and

Advertising, 1-10 employees

Reviewer Source 1

Source: GetApp

5/

**★★★★** 4/5

Ease of Use

5 \*\*\*\*\*

★ ★ ★ ★ Features &

Overall Functionality

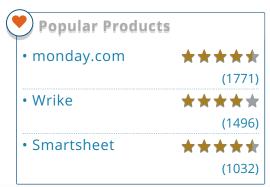
**★★★★**5/5

Customer Support

**★★★★** 4/5

Value for Money





Overall

**Functionality** 

Value for Money

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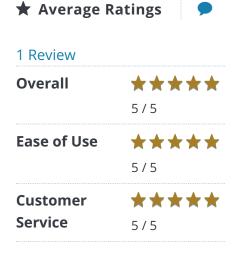
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↑ Home ➤ Budgeting Software ➤ Visual Cash Focus





**Who Uses This Software?** Any Business or organisation wanting to produce budget and rolling forecast, profit and loss, balance sheet and cash flows for management reporting without using excel.



**Review This Product!** 

#### **1** About Visual Cash Focus

Driver-based Budgeting and Rolling Forecast software Visual Cash Focus integrates budgeting, planning, forecasting, rolling forecasts, consolidation and financial reporting in a single tool. For small to large organisations Visual Cash Focus suits most industry types. The software is simple, easy, accurate and fast and removes the potential for errors inherent in spreadsheet budgeting solutions and is easy to implement.

#### Product Details

Starting \$995.00/onePrice time

Deploym ✓ Installed Windows

Support ✓ Online
✓ Business
Hours
✓ 24/7 (Live
Rep)



#### **■ Wendor Details**

Strategic Focus

www.strategicfocus.co.nz

Founded 1997

New Zealand

#### **≡** Visual Cash Focus Features

#### Budgeting Features ➤

View full list of Budgeting Software

~	"What If" Scenarios
~	Asset Planning
~	Balance Sheet
	Cash Management
~	Consolidation/Roll-Up
	Forecasting

- General Ledger
- Multi-Company
- Multi-Department/Project
- ✓ Profit/Loss Statement
- ✓ Version Control

#### Financial Reporting Features <

View full list of Financial Reporting Software

#### Visual Cash Focus Reviews

**Review This Product!** 

Sort Most Help ▼ by:



#### 'Visual Cash Focus Review'

Aug 15, 2012



**Pros:** I love Visual Cash Focus. It we way user friendly and logical to use. You can do so much with it too. Our clients love it, especially the actual vs budget reports!! Steve is great to deal with too.

**Cons:** I don't like the fact that you can't bold headings. This would make the reports easier to read. A couple of clients have mentioned this too.

**Overall:** Definitely recommend it. The best budgeting/cashflow forecasting software I have used.

About Capterra

#### Visual Cash Focus Reviews and Pricing - 2019

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**Who Uses This Software?** Cash Manager Focus is built for farmers who want to increase productivity on their farm or free up more time to spend with their families. Cash Manager Focus will help you achieve your goals.

#### **★** Average Ratings

Overall	****
Ease of Use	****
Customer Service	****

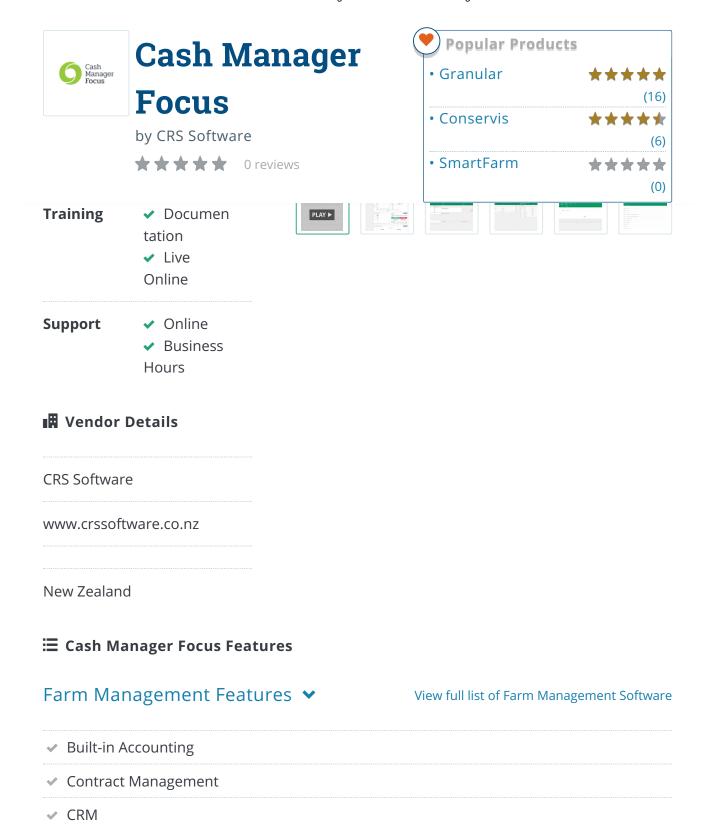
Review This Product!

#### Product Details

#### **1** About Cash Manager Focus

Cash Manager Focus is the next generation of Cashmanager RURAL. With all the features you know and love - just more modern and intuitive. Cash Manager Focus is simple and easy to use empowering you to make informed, confident decisions for your farm. From milk revenue planning to stock management, you use your data the way you need to. Start a free demo today!

What is Cash Manager Focus?



Inventory Management

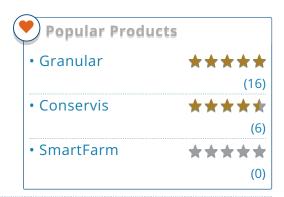
Crop Management



# Cash Manager Focus

by CRS Software





✓ Weather Records

#### Cash Manager Focus Reviews

**Review This Product!** 

No reviews, be the first!

Sort Most Help ▼
by:

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### **Focus 8 ERP**

A ERP software solution designed by Focus Softnet, LLC.









#### **Product Overview**

Developer	<u>Focus Softnet, LLC</u>
Туре	ERP Software
Client OS	Web
Deployment	Cloud Hosted

#### **Market Focus**

Ratio of reviewers by organization size.



Enterprise 11% Mid-Market 46% Small Business 43% Freelancers 0%

### **Industry Focus**

Ratio of reviewers by sector.

31% Manufacturing

27% Distribution

13% Real Estate

8% Service

5% Agriculture & Natural ...

Other Industries: Educational Services (5%), Hospitality (5%), Retail (4%)

#### **About Focus 8 ERP**

#### **Enabling Scalability**

The extensive nature of the solution allows Focus 8 to adapt to your organization's size and depth and grow user roles and profiles to suit the organizational hierarchy and structure.

- Modular structure lets you plan the ERP rollout strategy
- Unlimited\* masters, tags & workflows let you define & evolve your company's SOPs
- Powerful Application Programming Interface (API) lets you expand your operational unification across your organization

#### **Enabling Mobility**

The revolutionary new system architecture of Focus 8 brings the power of the ERP to your "pocket". Focus 8 apps bring real-time dashboards, reports, business intelligence, and various functions of the ERP system to you, wherever you are.

- Real-time system design gives you up-to-the-minute accurate information for effective and powerful decision making wherever you are
- Role specific system access allows you to define the functionality extended to mobile devices be it for field resources, sales teams or decision makers

#### **Enabling Decisions**

8/8/2019

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accurate information, presented in an intuitive layout, is a determining factor to your success.

- "Slice & Dice" your data in any way that you like
- Advanced customizable & role-specific dashboards put you in charge of what you see, and how you see it
- Cross-Modular Reports show you the complete picture arming you with holistic information to make informed decisions

#### **Enabling Governance**

You set responsibilities – and they should be followed! But who's watching? Let Focus 8 govern your business for you, leaving you to do what you do best – grow it further.

- Define unlimited\* workflows for all business processes
- Induct new users at optimum productivity instantly
- Be assured that business standards and protocols are followed
- Drive productivity through robust system governance

#### **Enabling Controls**

No matter how disciplined your organization or how robust the system, hierarchical approvals and crisis escalations are essential for effective business performance.

- Define unlimited\* approval trees and hierarchies
- Proactively auto-escalate critical functions
- Authorize on the go through Email, SMS or Mobile App
- Delegate authorization permissions to individuals or groups based on varying criteria (e.g. all, any one, majority, percentage threshold, etc.)
- Define authorization by line item

#### **Enabling Reach**

Now that you have all your locations and units using the same systems, it is particularly important that they all share data amongst themselves, allowing you to have access to critical information regardless of where you are.

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- 1 wo way online & online synchronization
- Scheduled Synchronization
- Multiple Server Architecture Capabilities
- Sync conflict management utilities

#### **Enabling Data Unification**

It is thrilling to note that your scale and size of operations demands multiple companies or SBU's to manage all the business traffic. Getting holding company reports and positions is now easier than ever.

- Automated inter-company transaction posting
- Inter-company field mapping
- Inter-company in & out transaction mailboxes
- · Multiple company consolidated reports

#### **Enabling Responses**

Earlier generations of systems only listened to what you had to "say", remember it, and display it back to you. Focus 8 now responds to instructions. Tell it\* what to do via various media, and watch the magic unfold as Focus 8 obeys your commands.

- Communicates using dashboards, alerts, SMS, Email and GTalk
- Understands and acts on replies\* received through the dashboard, alerts, Email and GTalk.
- App enhances the portable communication capability of the system
- · Integrated document emailing capabilities

#### **Enabling Proactivity**

The more you grow, the more complex your business becomes. Suddenly there are too many deadlines that come up, deliverables that need to be timely executed, and commitments to be honored, creating organizational reputation. The Schedulers & Alerts of Focus 8 help you do just that.

- Recurring journals
- Receivables reminders
- Pending task alerts (for authorizations, workflows, etc.)
- Periodic reports
- Expiry based alerts
- Hiser defined limit based alerts for currency and stocks https://softwareconnect.com/erp/focus-softnet-8-erp/

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#### **Enabling Efficiencies**

Focus 8 ERP is an easy to use, intuitive system that is a breeze to operate. Focus 8 will make you feel at home within minutes.

- Interactive home screen for ease of data entry
- Consistent UI design across modules
- Intuitive channeling of data through workflows
- · User specific multiple dashboards
- User specific report libraries

#### **Enabling SOPs**

- Generic core ERP system applicable for virtually any industry
- Vertical specific expansions available for a variety of industries
- Easy and efficient integration across modules and vertical specific systems
- Fully comprehensive end-to-end system

#### **Enabling Lean Infrastructure**

Focus 8's cloud friendly nature puts you in the driver's seat. Choose the size and scale of your ERP deployment and enjoy its scalable ability to grow in unison with your organization.

- Ability to host the application on cloud
- Scale number of users & modules based on your need
- Enjoy latest updates

#### **Business Intelligence**

#### **Dashboard**

The advanced integrated dashboard of Focus 8 is state-of-the-art and revolutionizes targeted customized data presentation based on roles and users. The intuitive layout, controls and features make sure that you see what you need to see in the format that works best for you.

- Define multiple user & role specific dashboards
- Portable dashboards allow you to create them on the computer and view them https://softwareconnect.com/erp/focus-softnet-8-erp/

- on your smart device
- Dashboards are essentially built up of multiple "dashlets" of varying sizes and capabilities that can be standardized or user-designed through a combination of text and graphs.
- You can add specific notifications, alerts, RSS Feeds, and web pages as dashlets
- Active dashlets let you maximize them to a large window, filter, or change the view between text and graphs

#### Analyze (Slice "N" Dice)

Data analysis is the key to making smarter decisions that defines direction to several aspects of your business. Data archival is simply the first step. The analytical capabilities of Business Intelligence allow to "slice 'n' dice" data empowering you with information.

- Focus 8 analysis features run across all standard as well as user-designed modules and reports
- Analytical features are very user friendly, equipped with drag and drop capabilities
- No programming or database expertise is required. An average user can create powerful analytical reports using the tools provided in the system
- Reuse analytical reports once designed by saving them as new BI Report Layouts

#### **KPI Definition**

An imperative tool to analyze data comes from KPI definitions. Visual cues bring your attention to triggered data items ensuring that you quickly identify areas of performance and those that need attention, significantly reducing the time it takes to do so.

- KPI definitions are available across all standard as well as user-designed modules and reports
- KPI definitions allow you to highlight data values through a report based on specific criteria
- The reports can indicate relevant data items using icons, images or color to suit your preference

<sup>•</sup> The flexibility allows you to define whether specific cells columns or rows get https://softwareconnect.com/erp/focus-softnet-8-erp/

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highlighted in the report further tailoring the reports to suit your needs

#### **Report Writer**

The intelligent report writer provided with Focus 8 can be "taught" how to design your reports, and where to pick data from. The limitless capabilities put you in charge ensuring that you get reports with all relevant information. Moreover, the report writer can also pick data items from various integrated sources including other applications, databases and even excel sheets. You can also use all BI capabilities including filtering, conditions, grouping, KPI definitions, and analysis across these generated reports. Once defined, you can save these report "templates" or add them to your dashboards as well.

- "Teach" the report writer how you want your reports designed
- Pick data from virtually any integrated source including applications, databases and excel sheets
- Use all Business Intelligence functionalities and capabilities including filters, grouping, KPI definition setting, analysis, and various other functions on these reports
- Save these reports for reuse, or add them to your dashboards as dashlets

#### **Benefits**

The BI capabilities offer you tremendous control over information that exists within and throughout your system. The data compiled and collated offers you an in-depth view of your organization, equipping you with the capabilities of making smart and effective decisions.

- Focus 8 BI offers you easy and quick access to critical data for effective decision making
- · Organizational "pulse" is always at your fingertips
- "Real time" data and smart reports provide you with up to the minute information
- Role & user specific information allows you to eliminate "data noise" and focus on relevant information
- Data presentation allows you to better understand customer behaviors, sales trends and cash flows
- Improves overall organizational efficiency

#### rmance management

#### **General Ledger**

Focus 8 has reinvented the General Ledger module completely in order to make the data experience easier and faster than ever. Role, user and region-specific layouts, views and controls enhance your productivity and user experience ensuring quick results every time. Focus 8 has automated as many functions as possible including recurring and reversal journals with varying definition parameters to ensure that you remain free to focus on more important activities.

- Multiple "Accounts Masters" and Views facilitate various modules including Accounts Payables, Receivables and Final Reports
- Multiple charts of accounts allow you to take final reports in country/region specific formats (e.g. US-GAAP, IFRS, etc.)
- Automated Recurring & Reversal Journals with parameter definitions including effective date, values, frequency type, etc. ensures that Focus 8 remembers & executes repetitive tasks for you
- Multi-currency capabilities are exhaustive and allow you to define global base currencies, department/branch currencies, reporting currencies, etc.
   Currency gains and losses are automatically computed and posted according to rules that you define
- Department & Cost Center capabilities allow you to allocate overheads and appropriate them across various accounting heads
- Administrative features are flexible in allowing you to define your period of closing, inter-company transactions, group company consolidations, etc.

#### **Cash Management**

Cash, the core essence of every organization, requires particularly detailed attention on its management, allocation and flow. The advanced cash management capabilities of focus 8 allow you to efficiently optimize your cash capabilities through intelligent and effective user interfaces.

- Execute Bank reconciliations automatically through mapped bank transaction statements
- Manage exceptions from the reconciliations (e.g. carry forward uncleared cheques, pass bank journals for bank charges, etc.)
- Manage & define multiple currencies for cash and bank accounts
- Integrate each flow calendar with nost-dated navments & receints with https://softwareconnect.com/erp/focus-softnet-8-erp/

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- reminder notifications including tenure based instruments for maturity. You can see both clear and unmatured balances through the system
- Cash flow calendar also shows you your receivables and payables ensuring that you plan your cash flows efficiently and effectively

#### **Accounts Receivable & Delinquency Management**

- Discount terms lets you decide the discounts applicable on a wide variety of parameters such as customer, invoice, master, item, group, value, time, settlement etc.
- Manage Currency Gain/Loss settlement differences & postings automatically post receipt of collections
- Settle bills through multiple options based on FIFO adjustments, bills of specified due dates or as advances
- Delinquency management allows you to define follow up methods, intervals, and formats which can be triggered on various parameters such as customer, date, overdue by, finance terms and other scenarios
- Execute customer specific statements and aging analysis based on parameters such as outstanding, adjustments, pending only, cut-off dates, predefined slabs, etc. and choose whether to include or exclude post-dated instruments

#### **Accounts Payable**

- · Custom-define payable bills adjustment based on their due dates
- Automatically post currency exchange gain/loss transactions based on the billed and paid amounts & currencies
- Automate Tax entries and posting of Direct VAT/GST and various other tax calculations from payments including taxes to be deducted
- Execute vendor specific statements and aging analysis based on parameters such as outstanding, adjusted, pending only, cut-off dates, predefined slabs, etc. and choose whether to include or exclude post-dated instruments

#### **Financial Planning & Budgeting**

- Automatically create budgets based on parameters based on previous year budgets, actuals, percentages or period based appropriations
- Allow department or cost center based budgetary planning
- Exercise strict control & monitor performance of actuals against the defined https://softwareconnect.com/erp/focus-softnet-8-erp/

- budgets and set restrictions, warnings and alerts for variations, escalations & approvals
- View budgets within the cash flow calendar to compare actuals with budgeted flows
- Flexibility in the budgets module allows you to create multiple budget revisions for multiple and variable periods of months and years

#### **Benefits**

- Integrates financials across departments
- Monitors organizational health in real-time
- Enables control & risk management
- Improves management effectiveness

#### **Fixed Assets Management**

#### **Fixed Assets & Depreciation**

Focus 8 has a fully integrated Fixed Assets & Depreciation module that allows you to seamlessly create assets from purchases and perform statutory transactions and administrative functions efficiently and automatically.

- Create assets from purchases instantly for single or multiple assets through quantity
- Select from multiple depreciation methods (St. Line, cumulative, etc.) based on the selected asset
- Create hierarchies and groups of various assets
- Allocate assets to a location, employee or any other parameter
- Define various periodic depreciation schedules for auto-posting to GL

#### **Asset Maintenance**

Focus 8 provides informaiton to effectively plan, schedule and execute efficient maintenance processes signifying the effect on the P & L.

- Scheduling of maintenance jobs
- Track effective job performance
- Track consumables and charges towards maintenance
- Track replacements https://softwareconnect.com/erp/focus-softnet-8-erp/

- ITACK TOPIACOHICHO
- Job material requirement procurement
- Asset usage and tracking
- Job scheduling based on usage
- Breakdown scheduling and equipment failure
- Maintenance reports

#### **Asset Revaluation & Repair**

Focus 8 allows you to accurately reevaluate your assets, and asses their values based on their condition of repair.

- Prolong your asset life by ensuring that it is in a good state of repair
- Continually enhance asset value and capability by adding components as child attributes
- Manage value deductions or accelerate depreciation as per the statutory compliances/as required
- Automatically post entries into the financial module upon reevaluation
- · Add value to your assets upon repair completion

#### **Asset Transfer, Disposal & Retirement**

Focus 8 provides you with a seamless system that can manage your asset transfer, disposal and retirement. Automated integration with financials ensures that you always have an accurate picture of your organizational asset value and asset distribution.

- Automatically post the gain/loss of value upon disposal of the asset
- · Deactivate/Retire fully depreciated assets automatically or manually
- · Park or pause the depreciation of inactive assets

#### Integration

Focus 8 Asset Management is fully integrated within the ecosystem ensuring that you always have complete information available to you throughout all modules. Effectively take decisions, use your assets to their fullest capacities and ensure maximum productivity.

- · Capitalize your assets from the inventory module
- Use a variety of nosting methods for financials to suit your specific situation https://softwareconnect.com/erp/focus-softnet-8-erp/

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- e.g. by month, group, etc.)
- Integrate with Human Capital Management for assets that you have allotted to specific employees (e.g. laptops, cellphones, cars, etc.)
- Seamlessly integrate with purchasing and post entries based on various parameters
- Financial integration automatically posts transactions on transfer, disposal, repair, etc. to ensure that you always have an accurate financial picture

#### **Benefits**

- Accurately track & safeguard your assets
- Reduce repetition and increase efficiencies of your administrative team through seamless integration
- Maximize asset utilization to boost your efficiencies and ROI

#### **Human Capital Management**

#### **Recruitment Management**

A core essential for growth and sustainability is recruitment. Focus 8 packs a highly capable recruitment management module which enables you to manage your recruitment process through its lifecycle.

- Plan manpower requirements
- · Define your recruitment requirements globally or by department
- Create an organization-wide CV Bank
- Integrate your website's careers page with the application or online CV submission
- Import bulk CVs from excel
- Powerful scanning facility lets you find suitable candidates from the CV Bank based on specific departmental requirements
- Manage CV screening, shortlisting, interviews and offer letter issuance through the system
- Take online tests from aspiring candidates in multiple languages

#### **Performance & Appraisal Management**

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- Create and define KPIs and goal sheets to track your employee performances
- Create multiple level appraisal structures
- Provide employees with a facility to login online and evaluate themselves through self-appraisal
- Use the Performance Management Dashboard to quickly ascertain the performance levels of your human capital

# **Personnel Training & Career Planning**

With the Personnel Training & Career Planning module, you can develop your human resources to fit your organization's requirements, and ensure that you are a responsible employer by developing your resources' careers effectively.

- Define course masters and schedules
- Allow departments to raise training requests for select employees
- Ensure effectiveness of training through attendance reports
- Ascertain training retention through course based examinations and result evaluations
- · Training bonds with employees as required

# **Timesheet & Payroll**

Monitor the discipline of your organization through effective timesheet and payroll management.

- Integrate with various attendance machines at all of your locations
- Define and design multiple timesheet input options
- Monitor attendance by shift, site, job, etc.
- Define parameters for and automatically calculate normal, overtime and holiday overtime pay
- Define payroll periods and employee categories
- Manage employee sites and shifts
- Automatically monitor & execute shift rotation
- Generate periodic automated password protected payslips

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reports, etc.

#### **Vacation, Leaves & End of Service**

Effectively manage your employee vacation, leaves and end of service benefits through the fully integrated Focus 8 human capital management module.

- Various general ledger posting methods (by month, group, etc.)
- Manage virtually any type of leave (e.g. sick, casual, vacation, maternity, etc.)
- Define gender based leaves
- Define leave encashment policies
- Define various rules of enjoying leaves as per your company policies

# **Loans Management**

Focus 8 allows you to effectively manage loans issued to your resources. Define loan policies and have them executed through the authorization matrix capabilities of Focus 8.

- Manage the full loan management system from loan application to loan approval, payment, deferment and settlement
- · Manage and document surety for loans issued

# **Employee Self Service**

Focus 8 enhances the inclusive nature of the system to provide resources to service themselves through the ESS module of the Focus 8 Human Capital Management Module.

- Employee Dashboard
- Employees can generate requests for leave, advance and training
- Training calendars can be displayed
- Employees can appraise themselves through the Employee Self-Appraisal Module
- Employees can download payslips
- Year-to-date reports can be provided

#### HIN VUIILLES

The HR utilities section of the Focus 8 Human Capital Module provide unparalleled capabilities to the HR department.

- Generate notices, warning letters and take disciplinary actions
- Allocate assets to employees
- Employee expenses claim form with integrated financials
- · MS-Outlook integration for expiry based alerts
- User configurable notifications and approvals by email

#### **Benefits**

- Improve talent acquisition and retention throughout your organization
- Empower HR Department with effective tools to enhance their role and position
- Increase employee productivity & optimize training cost

# **Production Management**

#### **Production Masters**

Production Masters offer you incredible flexibility and control over defining various parameters of the production cycle ensuring that each of your products, deliverables, and outputs can be efficiently reached through optimal use of the available infrastructure.

- Define single & multi-level Bills of Material including alternative raw materials
- Define, manage and schedule Factory Calendars for single and multiple shifts for single or multiple factories
- Define capacities, overheads and other parameters for individual machines and linked machine lines and create work centers
- Plan production routing to bring BOM and Work Centers together. Plan multiple routes to ensure maximum efficiencies are obtained through the available infrastructure
- Track all resources and consumables required and issued during the manufacturing process and ensure that the consumptions are within stipulated parameters

#### FIVUULUVII JUIEUUIIIIY

Efficient schedule management of the production infrastructure ensures that you deploy production resources based on orders, priority and materials available in stock thereby ensuring maximum productivity and enhancing customer satisfaction through timely delivery.

- Schedule single orders, combined multiple orders, and forecasted sales orders
- Accurately plan material requirements in order to fulfil planned schedule of production
- Automatically raise indents and purchase orders for shortfalls or missing raw materials and consumables based on the production schedule
- Schedule reports provide you with an in-depth view of the actual production timelines

#### **Vertical Based Production**

Focus 8 comes fully equipped with a versatile vertical-based production planning module. Depending upon the type of production style, Focus 8 allows you to define virtually unlimited combinations of production processes ranging from Formula based BOMs, to assembly, back flushing and job production.

- Process Production: Define fixed formulae for various BOMs to produce finished goods (e.g Chemicals, Paints, Dyes, etc.)
- Back Flushing: Work backwards to identify raw material consumption based on finished good selection. (e.g. ingredients for finished dishes consumed from stock, etc.)
- Assembly Production: Manage multiple routes for sub-assemblies and finished assemblies
- Job Production: Create user-defined BOMs for specific or generic jobs, and ensure that issued stocks are specific to the job output

# **Production Material Handling**

Focus 8 ensures that you have a complete and comprehensive grip on the handling of materials through the production cycle.

- Transfer stock to and from stores and the production floor
- Monitor, collate and ensure that the quantities of issued stock from stores, items return to stores and finished goods from shop floor production add up

accuratory

- Control wastage, variances, and threshold management of raw material issues and obtain real-time production status
- Monitor final product cost based on the costing module of production and variances as defined in the Work Center

#### **Benefits**

- Maintain optimum utilization of manufacturing resources and deliver maximum output
- Improve overall productivity and efficiency, and as a consequence, reduce production cost
- Streamline production process and improve final product quality
- Ensure timely delivery to customers and improve customer satisfaction

# **Sales Management**

#### **Credit Sales**

Managing sales on credit requires closer governance to ensure that the defined parameters of performance are adhered to. Focus 8's enhanced credit sales management module puts you in control to ensure that the definitions for Credit Sales are accurately followed.

- Define multiple sales flows to automate the push and pull of data through the sales cycle from inquiry to invoice
- Define effective credit control management parameters and manage the credit limits of customers and handle defaults of payments effectively
- Manage inventory reservations through on confirmed sales orders and ensure enhanced customer satisfaction
- Get quick updates through advanced info panels in the order/invoice entry views of customer sales history and last quoted price to expedite accurate processing of data
- Define quote/order approvals based on various parameters such as product line, department, customer, discount offered, credit limits, etc. to ensure that the organizational policies are adhered to
- The intuitive and easy to use analytical tools allow you to perform sales analysis on various sales related data through multiple parameters giving you

#### **Cash / Retail Sales**

Manage retail or cash sales through easy-to-use, efficient systems that make retail processing efficient. Focus 8 fully integrates all modules with the retail functionality to provide you with a comprehensive unified solution.

- Design and define the touchscreen interface for the sales retail till machine
- Manage multiple tills within one location, or multiple locations and configure seamless data synchronizations among the tills, locations and other administrative locations
- Effect stock transfers and manage inventory between outlets and warehouses. The automated synchronization transmits the transfer instructions to the issuing outlet automatically
- Manage Start-Of-Day and End-of-Day cash management with the option for cash settlement in multiple currencies
- Deploy a comprehensive Loyalty Management Solution to easily enhance customer experience and satisfaction through point-based systems

# **Vertical Specific Sales Processes**

- Restaurant Management: Manage the complete end-to-end restaurant experience for your patrons digitally from table reservations, to a tablet menu, order processing, kitchen integration, recipe management, and billing settlement and also provide home delivery and takeaway functionality
- Projects & Contracting: Manage sales for projects and contacts through progressive percentage completion based invoicing
- Installment & Hire purchase Billing: Manage installment based through effective management of post-dated instruments collection and rights transfer on full payment
- Service Industry Billing: Generate invoices based on industry standards for a variety of industries including Financial services, advertising, professional services and many more
- Mobile Sales: Manage field based sales activities including Van-Sales and other aspects through effective and integrated devices
- Other Industries: Manage sales for a variety of industries including Pharma & Food Items (tracked by batches), Electronics and Mobiles (tracked by RMA), Fashion (defined by attributes such as color & size) and many more
- Intelligent Application Programming Interface (API) can further configure https://softwareconnect.com/erp/focus-softnet-8-erp/

#### Focus 8 ERP | 2019 Software Reviews, Pricing, Demos

and personalize the sales process to suit your industry and specific business

# **Integration**

- Integrate the CRM on every sales quote to build a databank for effective schemes and activities
- Integrate the MRP module on order booking
- Integrate warehouses/bins for distribution
- Integrate the Service module for maintenance support and billing
- Integrate back-to-back purchases in the workflow
- Integrate with financials to reduce entries and have up to the minute reports

#### **Sales Promotions & Schemes**

- Define volume based rates and discounts
- Execute "free" item promotions based on a variety of parameters including quantity, item purchased, etc.
- Establish volume purchase based offers (e.g Buy 2 get 1 Free)
- Create Loyalty schemes based on purchase parameters
- Generate discount & promo coupons and integrate them into your campaign

#### **Benefits**

- Enhanced customer satisfaction and increased customer loyalty
- Improve your sales force efficiency and define/adhere to industry standard processes
- · Lower bad debts and improve receivables through accurate and timely action
- Deploy across multiple industry domains over a single application ensuring streamlined group consolidation
- Seamlessly integrate over multiple locations
- Gain a competitive edge with critical information on the dashboard for quick decisions

# **Supply Chain Management**

#### rui tiiase ivialiayellielit

The purchase management module of Focus 8 is a powerful way to ensure that accurate purchasing is effected through approved vendors and predefined rates, terms and conditions, ensuring that you protect your organization's interests.

- Complete Workflow Modules allow you to create multiple flows for recurring, one-time, local, import and various other types of purchase from requisition to supplier invoice
- Authorization & Escalation Management allows you to control approvals for purchase quotes and orders through hierarchical and multiple level authorizations
- Use the Price Book feature for easy and quick entries and updates of purchase prices across various parameters such as supplier, location, unit, etc.
- Analyze quotes across various parameters such as price, credit limit, delivery schedule, etc. to ensure efficient and effective purchasing
- Define, manage and execute orders through "Supplier Contracts" to ensure error-free order placement on pre-agreed terms and conditions

# **Inventory Management**

Managing your inventory across varying parameters, requirements, types of inventory, use cases, scenarios, etc. can be a daunting task. Focus 8 Inventory Management makes Inventory Management a liberating experience with its fully flexible capabilities.

- Manage inventory across a wide variety of parameters including units, reorder levels, batches, locations, RMA, supplies, bins, brands, attributes, quality control, Reserve/Release, etc.
- Establish a variety of costing methods including FIFO, LIFO, Standard Costing, Moving Weighted Average, etc.
- Execute queries on a wide variety of scenarios such as actual stock, virtual stock including pending purchase orders, stock reserved, etc. across various warehouses
- Manage inventory by Bins, attributes and capacities with user define Pick & Put strategies

# **Standard Vertical Specific Processes**

wide variety of varying business industries and verticals. This ensures that you run your business the way it needs to be run, and adapt the system to suit your needs rather than the other way around. This system is already configured for, but not restricted to the following verticals:

- Pharma/Perishable Goods Industries: Manage receipt and issuance of inventory based on batch, manufacturing date, date of expiry and related functions
- Electronics/Warranty-Based Products: RMA module management allows you to track each item with its serial number and claim replacements or service for faults and defects
- Fashion & Related Industries: Manage inventory attributes such as color, style, size, design, etc. and track stocks based on industry needs
- Machinery Purchasing for Manufacturing Industries: Manage capital goods purchasing through the integrated fixed asset purchase and management module
- Distribution Industries: Manage packing slips and lot integration for distribution within and outside of Free Zones and restricted trade zones
- Project/Job Industries: Define & manage complete workflows from Purchasing to stocking and issuing of materials and merchandize based on project plans

# **Inventory Utilities**

The inventory utilities allow you to effectively control and manage your inventory through capable features that reduce time and increase accuracy and efficiency.

- Manage physical stock checks through integrated hand-held devices for period-end or spot stock taking and reconciliations
- Generate and print bar codes through the comprehensive barcode generation utility
- Integrated dashboard reorder alerts ensures that the purchase department is made aware of stocks going below defined reorder levels
- Plan purchases based on sales orders, forecasting and other parameters
- Use the step-by-step Purchase Planning wizard culminating in Purchase Orders

#### DCIII 172

- Integrates financials across departments
- · Monitors organizational health in real-time
- Enables control & risk management
- · Improves management effectiveness

# **User Reviews**

No reviews have been submitted. Do you use Focus 8 ERP? Have you considered it as part of your software evaluation process? Share your perspective by writing a review, and help other organizations like yours make smarter, more informed software selection decisions!

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#### Why you can trust us

We don't sell software. We don't develop it, either. What do we do? We help you save time and money by reviewing great software.

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Nikon Metrology Inc. | America

# Focus Inspection - Point cloud inspection for full par Request info to-CAD and feature analysis

Focus Inspection is today's reference for point cloud inspection. It manages acquired point clouds and performs part-to-CAD comparison and advanced feature inspection. The software covers a wide range of inspection applications and offers stunning performance, an intuitive user interface, and standard macro functionality to automate the entire inspection process.

#### Key benefits

Easy-to-use inspection workflows for both operators and engineers Intelligent feature detection and analysis algorithms resulting in high productivity and consistent results Most complete set of functions for

digital surface and feature inspection

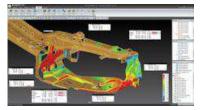
Easy-to-interpret and interactive reporting to facilitate decision making Inspection automation without requiring programming skills Share 3D results with colleagues and customers with free Focus viewer



#### Benefits & features

# Focus point cloud software platform

Focus offers tightly integrated data acquisition – via CMM or handheld scanners – and intelligent processing and reporting. Direct access to workflow selection, customization and automation facilitate the setup and execution of processing jobs. Focus drives seamlessly



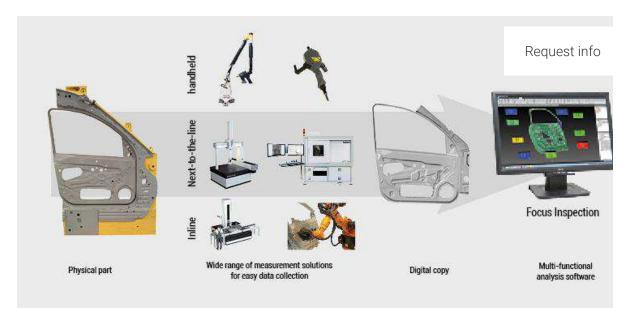
latest-generation Nikon Metrology CMM and handheld laser scanners, and supports many CMM and articulated arm brands.



Focus Inspection | Point cloud software | Software | Nikon Metrology

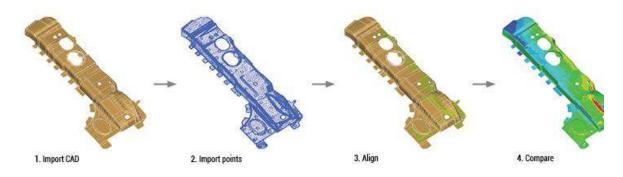
### Driving a digital inspection process

Digitizing components up-front and running inspection on the digital copies of the samples, streamlines metrology operations and embeds them into the digital CAD-centric development process. As a Digital Inspection Process provides more profound metrology insight, it is essential to improve and accelerate styling, tooling, prototyping and series production.



# Easy-to-use inspection workflows for both operators and engineers

The user interface is workflow-oriented to minimize the number of clicks required to move from point clouds to graphic geometry reports. Focus allows engineers to tune the process exactly as desired, whereas operators easily manage and run inspection jobs. During measurement, they monitor the inspection progress and outcome using easy-to-interpret and numerical result displays.



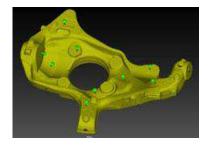
# Easy preparation of measurement programs

Focus Inspection offers the possibility to read product manufacturing information (PMI) from the CAD file. Using this information, features are retrieved automatically from the point cloud and evaluated to their tolerances. This eliminates the error prone and time consuming entry of dimensions and tolerances. The creation of the inspection program by teach-in does not require any programming skills.



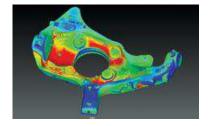
# Most complete set of functions for digital surface inspection

Part-to-CAD inspection compares the acquired point cloud with nominal CAD data, resulting in crystal-clear geometric deviation displays. Freeform surface inspection is ideal for studying material springback and shrinkage phenomena and to verify that the shape of the part is within geometry specifications.



#### Freeform surfaces

Full part-to-CAD inspection
2D and 3D sections
Wall thickness, edge analysis, etc.
Customizable fly-outs for clear interpretation



# Intelligent feature detection and analysis algorithms resulting in high productivity and consistent results

Focus extracts geometric features highly accurate, thanks to the thousands of measurement points captured by the scanner. The multitude of points allows the software to apply very accurate fitting to determine the exact position and orientation of a wide range of features. These algorithms have been developed based on comparison of tactile feature measurement on actual parts.

#### Focus Inspection | Point cloud software | Software | Nikon Metrology

#### Geometric features

Automatic and semi-automatic feature detection

- 2D features: surface point, hole, slot, plane, etc.
- 3D basic features: cylinder, sphere, etc.
- 3D advanced features: T-stud, welded stud, diamond pin, etc.

Sectional inspection of flush & gap between assemblies (body, door, trunk, etc.)

Definition of user-specific flush & gap and edge point calipers

Request info

Critical in obtaining a perfect assembly is measuring whether feature geometries meet the specified tolerances. Focus Inspection supports the internationally accepted ASME Y14.5 GD&T standard, illustrating the value it brings as a true metrology solution.

Imports GD&T data from nominal CAD

Complete set of certified GD&T functions to define tolerances on form, orientation and location

PTB certified feature calculation algorithms



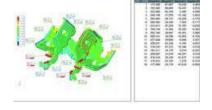
# Easy-to-interpret and interactive reporting to facilitate decision making

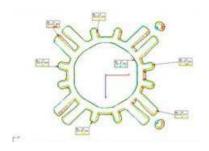
Correct decision making is based on the fast and unambiguous interpretation of measurement results. Because 3D graphical deviation reports provide results in an easy understandable format, Focus Inspection facilitates the communication between operators, managers and suppliers.

Customizable Microsoft Excel template based reporting Statistical Process Control (SPC): Q-Stat, QC-Calc, DMIS, txt

Data export to a variety of file formats to flexibly share results with other users and applications

Free Focus Viewer software to create user-specific 3D analysis reports

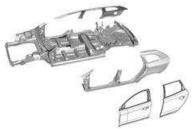




# Virtual assembly for faster decisionmaking and shorter pre-production processes

Digital copies of reference parts are used to build an assembly with CAD models or other point cloud data. This approach saves material by avoiding expensive templates, fixtures and scrap. It also saves time by avoiding lengthy

fixtures and scrap. It also saves time by avoiding lengthy physical assembly builds, resulting in faster decision-making and shorter pre-production processes.



Focus Inspection | Point cloud software | Software | Nikon Metrology

# Share 3D results with colleagues and customers with free Focus viewer

Focus Inspection reports include part-to-CAD comparison plots with color-coded areas marking local geometry deviation. Quickly gaining relevant insight is critical in identifying the source of a problem and keep production quality up to level. The license-free Focus Viewer allows graphic reports to be shared easily with colleagues and suppliers, who use it for interactive analysis purposes.

Request info

# Inspection automation without requiring programming skills

Focus Inspection can easily be set up to execute alignment, filtering and meshing as well as analysis and reporting automatically. Focus Inspection incorporates standard automation functionality that supports non-stop execution of repetitive inspection tasks. This allows multiple scan files or even the complete inspection cycle of a series of specimens to be processed automatically.

Automation of CMM-based scan process and inspection analysis Macro-based recording of actions: No specific programming skills required

#### **Brochures**



Focus

#### Contact Us

# Nikon Metrology, Inc

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Website: <a href="mailto:www.nikonmetrology.com">www.nikonmetrology.com</a>
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Email: <u>sales.nm-us@nikon.com</u> Website: <u>www.nikonmetrology.com</u> Telephone number: (949) 716-4440

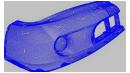
# Nikon Metrology, Inc (Texas)

8113 Ridgepoint Dr. Irving, TX 75063 United States

Email: <u>sales.nm-us@nikon.com</u> Telephone number: (810) 220-4360

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# Industrial applications









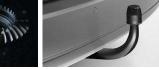
Automotive design and styling

Pilot plant metrology

Flush and gap inspection

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Powertrain components

Aftermarkets

# Related products









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Focus Ortho Software | The New Standard in Orthodontic Management Software

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To Focus Ortho, you're more than just another customer. We know you want easy, efficient practice management software, and we promise...

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Focus Ortho was designed from the ground up to run in the cloud. There aren't many other companies out there that can claim the same thing.

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# Restaurant POS Software

Say goodbye to workarounds and disjointed operations. Focus POS restaurant management systems turn v control labor costs, efficiently manage inventory, and have deeper visibility into your business. Our restauracustomer service, allowing you to create the dining experiences that will delight customers and earn their k and deliver return on investment by maximizing operational efficiency and minimizing costs.

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# Restaurant POS Buyers Guide

**Need help?** Read our step-by-step guide to making an informed purchasing decision.

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# **Focus POS Benefits**

#### **Easy to Use**

Our intuitive touchscreen interface minimizes the time and cost necessary to train new employees and gives your experienced staff the ability to work more productively.

#### Reliable

Focus POS enables your business to operate without interruption as you manage tables, communicate orders to the kitchen, process payments—and maximize table turnover.

#### **Fast, Accurate Ordering**

At a stationary or mobile POS terminal, ordering is easy with images, graphic displays, custom screens, packaged commands, and modifiers.

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15,000+
Installations

**50,000+** Terminals Deployed

72 Million+
Annual Transactions

**60+**National Resellers

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# **myFocus**

The myFocus Cloud includes mobile management and alerts, cloud-based reporting, customer loyalty, and gift card solutions.

#### **LEARN MORE**



#### **Mobile POS**

Streamline workflows and provide quicker, more accurate service using Focus POS on a mobile device to take orders and process payments tableside.

#### **LEARN MORE**



iPad POS

Focus POS is compatible with iPad tablets for an aesthetically pleasing, sleek, modern countertop point of sale terminal or for an easy-to-use mobile solution.

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#### Multi-Check Dashboard

Manage checks from all areas of your business—table, carry-out, delivery—from one screen and perform multiple functions without closing the dashboard.

**LEARN MORE** 



#### **Restaurant Online Ordering**

Give your customers the convenience of placing orders in advance and streamline in-house processes with our fully integrated solution.

**LEARN MORE** 



#### **nFocus**

Our nFocus report dashboard gives you easy access to the data you need to manage employees, oversee operations and to make better business decsions.

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## Focus as a Subscription

Give your business the advantages of a top-of-the-line, scalable Focus POS system on a budget-friendly, monthly subscription basis. Reduce risk and upgrade for free.

**LEARN MORE** 



**Tablet POS** 

Expand your POS capabilities with tablet POS. Training is easy: the Focus POS interface is the same on your tablet or stationary POS terminal.

**LEARN MORE** 

Want to learn more about Focus POS?

#### **DOWNLOAD COMPANY BROCHURE**

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Focus POS Software | Focus POS Systems

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#### **Table Service**

Our table service POS system provides a variety of features that help to increase average ticket size, increase table turnover, improve customer service, and streamline food preparation.

#### **Quick Service**

The quick service industry requires employees to work at faster pace and more efficiently than ever before. An easy-to-use, intelligent interface to streamline order-taking is essential.

# **Our Clients**

The biggest names in the hospitality industry trust Focus POS

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# **Our Latest Resources**



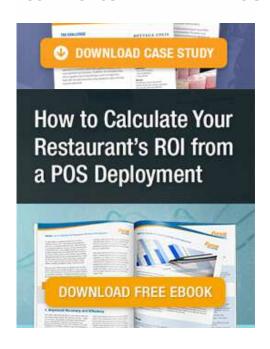
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# What All Restaurants Have in Common

Even though different types of restaurants have different needs for POS functionality, they all need reliable support and service to keep operations running. Focus POS is sold and supported by a skilled and experienced network of local dealers who provide our customers with support and inperson service when it's needed most.

**FIND A DEALER** 

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restaurant management software to hospitality establishments.

> REQUEST A DEMO

of our products. We look forward to having you on the Focus team!

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Email:

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Call Focus (800) 775-0996

Email;

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5 Questions Your Restaurant Analytics Should Answer August 1, 2019

Everything You Need to Know about Restaurant Management June 27, 2019

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Providing school districts with scalable and flexible solumeet today's information demands.

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Company Y Technology Contact Support & Implementation

Web-based

Fully Integrated Scalable & Flexible stomer Drive oustomizable

# Web-based

If you have an internet connection, you have Focus.



Solutions × Company × Technology Contact Support & Implementation



Solutions > Company > Technology Contact Support & Implementation

#### **Solutions**

Scheduling

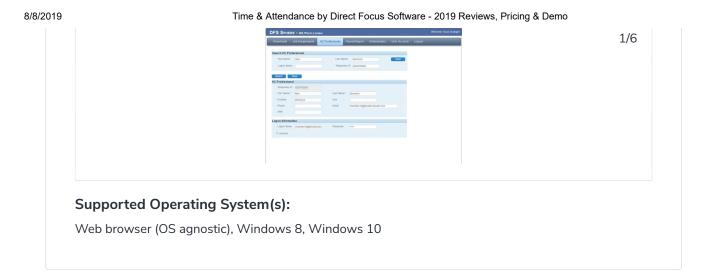
**Communication & Paper Reduction** 

Discipline

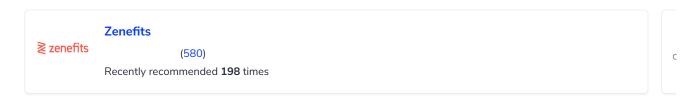
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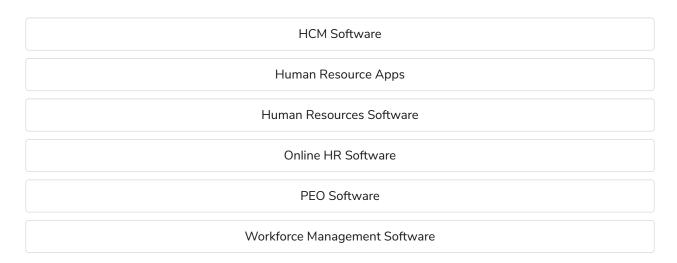


#### Other Top Recommended Human Resources Software



## Popular Guides Featuring Time & Attendance by Direct Focus

Time & Attendance by Direct Focus appears in the following software guides:



# 5 Reviews of Time & Attendance by Direct Focus

Filter reviews by:

Company size

Sort by: Most Helpful | Most Recent

September 2017

#### Saving sweet precious time

My employees can check their hours at the click of a button and I can easily run reports. Customer support has always been a pleasure to work with. Well worth it. We are very pleased with this product and highly recommend it.

#### **Pros**

We have been using for over a year. What a wonderful investment! It's cut my payroll time in half.

June 2018

#### Customizable Software makes it easier to Manage your business effectively

#### Pros

Great Customer service. Saved me a lot of time and stress. Software is customization makes it more efficient for our company. Employees are able to view their records without me having to print a report and send it to them.

#### Cons

The price is a little more than we were looking to spend but at the same time are happy we did and now believe it will be a good investment.

March 2018

#### Did some HR for some time and this program is the BEST

#### **Pros**

8/8/2019

Time & Attendance by Direct Focus Software - 2019 Reviews, Pricing & Demo

All of the features it has really helped me manage my time with payroll and also it allows the employees to look for their own reports and records individually.

#### Cons

Great investment to buy, just a little expensive but honestly it is absolutely worth it. It has been a great.

May 2018

#### All in one

#### **Pros**

Time and attendance is a good help for me as the one who do payroll. It is also a good way for employee to view their records. Less question to answer.

#### Cons

It is a bit expensive, but worth paying for. Just consider it as investment for your the betterment.

September 2018

#### Just the basics

#### **Pros**

low cost for a business not needing extra bells and whistles for time keeping software. Just the basics.

#### Cons

just the basic time keeping software, no frills. Basic reporting. Outdated software. Need to swipe cards.

In just fifteen minutes, the experts at Software Advice can help you narrow down

Time & Attendance by Direct Focus Software - 2019 Reviews, Pricing & Demo

the right software for your organization.

Call us for a Free FastStart Consultation: (844) 675-2849

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# Focus 9 - Thin-client ERP loaded with in-memory computing

Customer service (https://clienta

Know more (erp-software/enterprise-erp/focus9)

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## **Business intelligence**

Business intelligence (BI) comprise the strategies and technologies used by enterprises for the <u>data analysis</u> of <u>business information</u>.<sup>[1]</sup> BI technologies provide historical, current and predictive views of <u>business operations</u>. Common functions of business intelligence technologies include reporting, <u>online analytical processing</u>, <u>analytics</u>, <u>data mining</u>, process mining, complex event processing, <u>business performance management</u>, <u>benchmarking</u>, <u>text mining</u>, predictive <u>analytics</u> and <u>prescriptive analytics</u>. BI technologies can handle large amounts of structured and sometimes unstructured data to help identify, develop and otherwise create new strategic <u>business opportunities</u>. They aim to allow for the easy interpretation of these <u>big data</u>. Identifying new opportunities and implementing an effective strategy based on <u>insights</u> can provide <u>businesses</u> with a competitive market advantage and long-term stability.<sup>[2]</sup>

Business intelligence can be used by enterprises to support a wide range of business decisions ranging from operational to strategic. Basic operating decisions include product positioning or pricing. Strategic business decisions involve priorities, goals and directions at the broadest level. In all cases, BI is most effective when it combines data derived from the market in which a company operates (external data) with data from company sources internal to the business such as financial and operations data (internal data). When combined, external and internal data can provide a complete picture which, in effect, creates an "intelligence" that cannot be derived from any singular set of data. Amongst myriad uses, business intelligence tools empower organizations to gain insight into new markets, to assess demand and suitability of products and services for different market segments and to gauge the impact of marketing efforts. [4]

Often BI applications use data gathered from a <u>data warehouse</u> (DW) or from a <u>data mart</u>, and the concepts of BI and DW combine as "BI/DW"<sup>[5]</sup> or as "BIDW". A data warehouse contains a copy of analytical data that facilitate decision support.

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#### **History**

The earliest known use of the term *business intelligence* is in Richard Millar Devens' *Cyclopædia of Commercial and Business Anecdotes* (1865). Devens used the term to describe how the banker <u>Sir Henry Furnese</u> gained profit by receiving and acting upon information about his environment, prior to his competitors:

Throughout Holland, Flanders, France, and Germany, he maintained a complete and perfect train of business intelligence. The news of the many battles fought was thus received first by him, and the <u>fall of</u> Namur added to his profits, owing to his early receipt of the news.

— Devens, p. 210

The ability to collect and react accordingly based on the information retrieved, Devens says, is central to business intelligence.<sup>[6]</sup>

When <u>Hans Peter Luhn</u>, a researcher at <u>IBM</u>, used the term *business intelligence* in an article published in 1958, he employed the <u>Webster's Dictionary</u> definition of intelligence: "the ability to apprehend the interrelationships of presented facts in such a way as to guide action towards a desired goal."<sup>[7]</sup> Business intelligence as it is understood today is said to have evolved from the <u>decision support systems</u> (DSS) that began in the 1960s and developed throughout the mid-1980s. DSS originated in the computer-aided models created to assist with decision making and planning.

In 1989, Howard Dresner (later a <u>Gartner</u> analyst) proposed *business intelligence* as an <u>umbrella term</u> to describe "concepts and methods to improve business decision making by using fact-based support systems." [8] It was not until the late 1990s that this usage was widespread. [9]

Critics see BI merely as an evolution of <u>business reporting</u> together with the advent of increasingly powerful and easy-to-use <u>data analysis</u> tools. In this respect it has also been criticized as a marketing buzzword in the context of the "<u>big data</u>" surge.<sup>[10]</sup>

#### **Definition**

According to Solomon Negash and Paul Gray, We define business intelligence (BI) as systems that combine:

- Data gathering
- Data storage
- Knowledge management

with analysis to evaluate complex corporate and competitive information for presentation to planners and decision maker, with the objective of improving the timeliness and the quality of the input to the decision process." [11]

According to Forrester Research, business intelligence is "a set of methodologies, processes, architectures, and technologies that transform raw data into meaningful and useful information used to enable more effective strategic, tactical, and operational insights and decision-making."<sup>[12]</sup> Under this definition, business intelligence encompasses information management (data integration, data quality, data warehousing, master-data management, text- and content-analytics, et al.). Therefore, Forrester refers to data preparation and data usage as two separate but closely linked segments of the business-intelligence architectural stack.

Some elements of business intelligence are:

- Multidimensional aggregation and allocation
- Denormalization, tagging, and standardization

Business intelligence - Wikipedia

- Realtime reporting with analytical alert
- A method of interfacing with unstructured data sources
- Group consolidation, budgeting and rolling forecasts
- Statistical inference and probabilistic simulation
- Key performance indicators optimization
- Version control and process management
- Open item management

Forrester distinguishes this from the *business-intelligence market*, which is "just the top layers of the BI architectural stack, such as reporting, analytics, and dashboards." [13]

#### Compared with competitive intelligence

Though the term business intelligence is sometimes a synonym for <u>competitive intelligence</u> (because they both support <u>decision making</u>), BI uses technologies, processes, and applications to analyze mostly internal, structured data and business processes while competitive intelligence gathers, analyzes and disseminates information with a topical focus on company competitors. If understood broadly, business intelligence can include the subset of competitive intelligence.<sup>[14]</sup>

#### Compared with business analytics

Business intelligence and <u>business analytics</u> are sometimes used interchangeably, but there are alternate definitions.<sup>[15]</sup> Thomas Davenport, professor of information technology and management at <u>Babson College</u> argues that business intelligence should be divided into <u>querying</u>, <u>reporting</u>, <u>Online analytical processing</u> (OLAP), an "alerts" tool, and business analytics. In this definition, business analytics is the subset of BI focusing on statistics, prediction, and optimization, rather than the reporting functionality.<sup>[16]</sup>

#### Data

Business operations can generate a very large amount of information in the form of e-mails, memos, notes from call-centers, news, user groups, chats, reports, web-pages, presentations, image-files, video-files, and marketing material. According to Merrill Lynch, more than 85% of all business information exists in these forms; a company might only use such a document a single time. Because of the way it is produced and stored, this information is either unstructured or semi-structured.

The management of semi-structured data is an unsolved problem in the information technology industry. According to projections from Gartner (2003), white collar workers spend 30–40% of their time searching, finding, and assessing unstructured data. BI uses both structured and unstructured data. The former is easy to search, and the latter contains a large quantity of the information needed for analysis and decision making. Because of the difficulty of properly searching, finding and assessing unstructured or semi-structured data, organizations may not draw upon these vast reservoirs of information, which could influence a particular decision, task or project. This can ultimately lead to poorly informed decision making. Italian

Therefore, when designing a business intelligence/DW-solution, the specific problems associated with semi-structured and unstructured data must be accommodated for as well as those for the structured data.<sup>[19]</sup>

#### Unstructured data vs. semi-structured data

Unstructured and semi-structured data have different meanings depending on their context. In the context of relational database systems, unstructured data cannot be stored in predictably ordered <u>columns</u> and <u>rows</u>. One type of unstructured data is typically stored in a <u>BLOB</u> (binary large object), a catch-all data type available in most <u>relational database</u> management systems. Unstructured data may also refer to irregularly or randomly repeated column patterns that vary from row to row<sup>[20]</sup> or files of natural language that do not have detailed metadata.<sup>[21]</sup>

Many of these data types, however, like e-mails, word processing text files, PPTs, image-files, and video-files conform to a standard that offers the possibility of metadata. Metadata can include information such as author and time of creation, and this can be stored in a relational database. Therefore, it may be more accurate to talk about this as semi-structured documents or data, [18] but no specific consensus seems to have been reached.

Unstructured data can also simply be the knowledge that business users have about future business trends. Business forecasting naturally aligns with the BI system because business users think of their business in aggregate terms. Capturing the business knowledge that may only exist in the minds of business users provides some of the most important data points for a complete BI solution.

#### Limitations of semi-structured and unstructured data

There are several challenges to developing BI with semi-structured data. According to Inmon & Nesavich, [22] some of those are:

- Physically accessing unstructured textual data unstructured data is stored in a huge variety of formats.
- Terminology Among researchers and analysts, there is a need to develop a standardized terminology.
- Volume of data As stated earlier, up to 85% of all data exists as semi-structured data. Couple that with the need for word-to-word and semantic analysis.
- Searchability of unstructured textual data A simple search on some data, e.g. apple, results in links where there is a reference to that precise search term. (Inmon & Nesavich, 2008)<sup>[22]</sup> gives an example: "a search is made on the term felony. In a simple search, the term felony is used, and everywhere there is a reference to felony, a hit to an unstructured document is made. But a simple search is crude. It does not find references to crime, arson, murder, embezzlement, vehicular homicide, and such, even though these crimes are types of felonies."

#### Metadata

To solve problems with searchability and assessment of data, it is necessary to know something about the content. This can be done by adding context through the use of <u>metadata</u>. Many systems already capture some metadata (e.g. filename, author, size, etc.), but more useful would be metadata about the actual content – e.g. summaries, topics, people or companies mentioned. Two technologies designed for generating metadata about content are automatic categorization and information extraction.

#### **Applications**

Business intelligence can be applied to the following business purposes:<sup>[23]</sup>

- Performance metrics and <u>benchmarking</u> inform business leaders of progress towards business goals (<u>business</u> process management).
- Analytics quantify processes for a business to arrive at optimal decisions, and to perform business knowledge discovery. Analytics may variously involve data mining, process mining, statistical analysis, predictive analytics, predictive modeling, business process modeling, data lineage, complex event processing and prescriptive analytics.
- Business reporting can use BI data to inform strategy. Business reporting may involve <u>data visualization</u>, <u>executive</u> information system, and/or OLAP
- BI can facilitate <u>collaboration</u> both inside and outside the business by enabling <u>data sharing</u> and <u>electronic data</u> <u>interchange</u>

 Knowledge management is concerned with the creation, distribution, use, and management of business intelligence, and of business knowledge in general. Knowledge management leads to <u>learning management</u> and <u>regulatory</u> compliance.

#### Marketplace

In a 2013 report, Gartner categorized business intelligence vendors as either an independent "pure-play" vendor or a consolidated "megavendor". [24][25] In 2012 business intelligence services received \$13.1 billion in revenue. [26]

#### **Historical predictions**

A 2009 paper predicted<sup>[27]</sup> these developments in the business intelligence market:

- Because of lack of information, processes, and tools, through 2012, more than 35 percent of the top 5,000 global companies regularly fail to make insightful decisions about significant changes in their business and markets.
- By 2012, business units will control at least 40 percent of the total budget for business intelligence.
- By 2012, one-third of analytic applications applied to business processes will be delivered through coarse-grained application mashups.

A 2009 Information Management special report predicted the top BI trends: "green computing, social networking services, data visualization, mobile BI, predictive analytics, composite applications, cloud computing and multitouch". [28] Research undertaken in 2014 indicated that employees are more likely to have access to, and more likely to engage with, cloud-based BI tools than traditional tools. [29]

Other business intelligence trends include the following:

- Third party SOA-BI products increasingly address ETL issues of volume and throughput.
- Companies embrace in-memory processing, 64-bit processing, and pre-packaged analytic BI applications.
- Operational applications have callable BI components, with improvements in response time, scaling, and concurrency.
- Near or real time BI analytics is a baseline expectation.
- Open source BI software replaces vendor offerings.

Other lines of research include the combined study of business intelligence and uncertain data.<sup>[30][31]</sup> In this context, the data used is not assumed to be precise, accurate and complete. Instead, data is considered uncertain and therefore this uncertainty is propagated to the results produced by BI.

According to a study by the Aberdeen Group, there has been increasing interest in <u>Software-as-a-Service</u> (SaaS) business intelligence over the past years, with twice as many organizations using this deployment approach as one year ago -15% in 2009 compared to 7% in 2008. [32]

An article by InfoWorld's Chris Kanaracus points out similar growth data from research firm IDC, which predicts the SaaS BI market will grow 22 percent each year through 2013 thanks to increased product sophistication, strained IT budgets, and other factors.<sup>[33]</sup>

#### See also

- Accounting intelligence
- Analytic applications
- Artificial intelligence marketing
- Business activity monitoring
- Business Intelligence 2.0
- Business intelligence software

- Business process discovery
- Business process management
- Customer dynamics
- Decision engineering
- Enterprise planning systems
- Integrated business planning

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- Management information system
- Mobile business intelligence
- Operational intelligence
- Process mining

- Real-time business intelligence
- Sales intelligence
- Test and learn

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# Business Intelligence Software

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# TechnologyAdvice Guide to Business Intelligence Software

Updated: Aug. 1st, 2019

#### What is Business Intelligence Software?

Business intelligence software is a set of tools used by companies to retrieve, analyze, and transform data into meaningful information. Examples of business intelligence tools include data visualization, data warehousing, dashboards, and reporting.

Covering a range of technologies, business intelligence (BI) loosely refers to tools that retrieve, analyze, and transform data into meaningful information that helps businesses make more intelligent decisions. In contrast to competitive intelligence, business intelligence software (https://technologyadvice.com/business-intelligence/) pulls from internal data that the business produces, rather than from outside sources.

The term business intelligence started being used sometime around the late 1950s, and grew from a set of technologies called decision support systems. It's fitting to consider business intelligence in relation to decision support systems, because that's exactly what business intelligence does: it helps businesses gain a competitive edge by supporting and improving their decisions with relevant, insightful information.

The rise in popularity of BI software is closely linked to the rise of "**Big Data**." As technology has progressed and more activities have shifted to the Internet, it has become possible to track and compile behavioral data like never before. And not just human data, but market data, environmental data, and more. By 2018, it's predicted that big data will be a \$20.8 billion market (http://www.prweb.com/releases/business-intelligence-bi/market/prweb11448329.htm).

To make informed choices, businesses need to base their decisions on evidence. The mountains of data that businesses - not to mention their customers - are producing contain evidence of purchasing patterns and market trends. And thus, business intelligence was born. As mentioned before, BI has been around for a while, usually in the form of quarterly or yearly reports. However, the business intelligence we're referring to happens at light speed, and can help a company choose a course of action in a matter of minutes.

In the Information Age, everyone produces data. Walmart handles more than 1 million customer transactions per hour. IDC estimates that by 2020, online business-to-business (B2B) and business-to-consumer (B2C) transactions will exceed \$450 billion a day (http://www.grabstats.com/statmain.aspx?StatID=2032). Answers and insight live

inside that data, waiting to be uncovered. The businesses that harness that intelligence first, will gain a competitive advantage by predicting customer behavior, forecasting market trends, and outsmarting their rivals.

BI software interprets a sea of quantifiable customer and business actions and returns queries based on patterns in the data. BI comes in many forms, and spans many different types of technology. For the purpose of this guide, we'll look at three main areas to which BI can be applied, and examine the tools used for each.

#### **How Big Data is Managed**

Data lives in a number of systems throughout an organization. For example, large enterprises could have information about their customers in their customer relationship management (https://technologyadvice.com/crm/) (CRM) application, and have financial data in their enterprise resource planning (https://technologyadvice.com/erp/) (ERP) application. The most common first step in utilizing BI is often taking an inventory of all the data your business produces.

#### **BI Vendor Overview**

#### **Best BI Software (By Category)**

Self-Service	Data Visualization	Data Warehousing	BI Platforms
SAP Crystal Reports (https://technologyadvi crystal-reports-reviews/)	iDashboards (https://technologyadvi reviews/)	Sisense (https://technologyadvi reviews/)	Tableau (https://technologyadvi reviews/)
Chartio (https://technologyadvi reviews/)	Dundas (https://technologyadvi dashboard-dundas- data-reviews/)	Oracle BI (https://technologyadvi business-intelligence- reviews/)	InsightSquared (https://technologyadvi reviews/)
Alteryx (https://technologyadvi analytics-alteryx- reviews/)	Segment (https://technologyadvi reviews/)	SAS (https://technologyadvi analytics-reviews/)	Domo (https://technologyadvi reviews/)

The Best Business Intelligence Software in 2019

Self-Service	Data Visualization	Data Warehousing	BI Platforms
Jaspersoft	Geckoboard	Birst	GoodData
(https://technologyadvi	(https://technologyadvi	(https://technologyadvi	(https://technologyadvi
reviews/)	reviews/)	reviews/)	reviews/)

#### **Data Warehouses**



Business intelligence combines disparate data sources into one database by building a data warehouse. Data warehouses act as a central repository for data to be queried and analyzed by other BI applications. Using the extract, transform, and load method, data warehouses aggregate data from across an organization and make it easier for other applications to quickly access them.

Analytics and reporting tools can still function without data warehouses, but running reports through CRM software, or even point of sale (POS) software not only limits the focus of the intelligence, it also negatively affects the performance of those applications. Also, the data in these systems exist in different formats, making it exceptionally difficult to draw conclusions and identify patterns without restructuring the data into a common format and housing it in a common area.

Data are stored in a data warehouse in dimensions and facts. Facts represent numbers for a specific action, likes the sales of a widget. Dimensions give context to facts by adding dates and locations. For instance, dimensions could break apart the sales of a widget by months or years, making queries easier to perform.

#### **Data Marts**

Essentially simpler, narrower versions of data warehouses, data marts focus on a specific subset of data instead of storing data from across the entire company. This could be data that are used frequently, or by only one department. Data marts are cheaper to implement than data warehouses and could provide non-IT staff with a better user experience by limiting the complexity of the database.

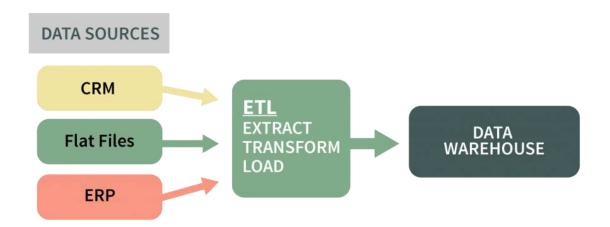
#### Extract, Transform and Load (ETL)

Named for the process by which data is transferred into a data warehouse, ETL applications are for normalizing data in a central location. ETL software can be included with data warehouse software or be purchased as an add-on application. Let's examine each letter in ETL:

**Extract:** Often the most difficult aspect of the process, the degree of success by which data are extracted from their source systems - ERP or CRM systems for example - influences the success of the rest of the process. Often data are unstructured, meaning they aren't formatted well for fitting into rows and columns, which makes it more difficult to analysis once it's been stored in a data warehouse. Tagging unstructured data with metadata – information about the author, type of content, and so on – can help make it more easily found once it's been extracted.

**Transform:** To prepare the data for storage in the data warehouse, the second stage of ETL applies rules to incoming data in order to "clean" or normalize it. For analyses to work properly, data must exist in the same format - think apples to apples - or else the queries won't be accurate..

Load: Now that the data have been extracted from their source systems and normalized through the transform phase, it's ready to be loaded into the central database, mostly commonly the data warehouse. Load frequencies will vary by organization. Some businesses may enter new data on a weekly basis while others will do it every day.



#### Hadoop

A very popular data storage framework, Hadoop is an infrastructure for storing and processing large sets of data. Though Hadoop stores data, it does so in a contrasting manner to a traditional data warehouse. Hadoop uses a cluster system – Hadoop Distributed File System or HDFS – that allows users to store files in multiple servers.

Hadoop's infrastructure provides an excellent framework for businesses that a great number of data as well as very large data files. Due to its cluster framework, Hadoop can also act as a backup mechanism: if one server goes down, businesses don't lose access to all of their data. However, Hadoop isn't well suited for ad hoc queries like normal data warehouses, and it can be quite complex for users who aren't familiar with javascript.

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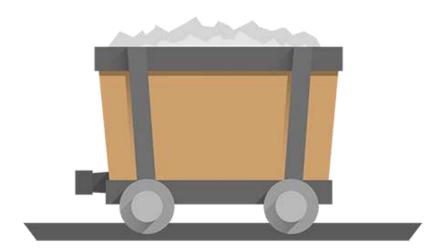
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#### **Analyzing Big Data**

Regardless of whether businesses choose to store their data in a data warehouse or run queries on the source system, the analysis part of business intelligence is what produces the insight that makes the entire field so appealing. Analytics technologies vary in terms of complexity, but the general method of combining large amounts of normalized data to identify patterns remains consistent across platforms.

#### **Data Mining**

Also known as "data discovery," data mining involves automated and semi-automated analyses of sometimes large sets of data to uncover patterns and inconsistencies. Common correlations drawn from data mining include grouping specific sets of data, finding outliers in data, and drawing connections or dependencies from disparate data sets.



Data mining often uncovers the patterns used in more complex analyses, like predictive modeling, which makes it an essential part of the BI process. Indeed, it could be argued that all the "intelligence" in business intelligence is derived from data mining.

Of the standard processes performed by data mining, association rule learning presents the greatest benefit. By examining data to draw dependencies and construct correlations, the association rule can help businesses better understand the way customers interact with their website or even what factors influence their purchasing behavior.

Association rule learning was originally introduced to uncover connections between purchase data recorded in point of sale systems at supermarkets. For example, if a customer bought ketchup and cheese, association rules would likely uncover that that customer was purchasing hamburger meat as well. While this is a simplistic example, it works to illustrate a type of analysis that now connects incredibly complex chains of events, and helps users find correlations that would have stayed hidden otherwise.

#### **Predictive Analytics**

Perhaps one of the most exciting aspects of BI, predictive analytics applications function as an advanced subset of data mining. As the name suggestions, predictive analytics forecast future events based on current and historical data. By drawing connections between data sets, these software applications predict the likelihood of future events, which can lead to a huge competitive advantage for businesses.

Predictive analysis involves very detailed modeling, and even ventures into the realm of machine learning, where software actually learns from past events to predict future consequences. For our purposes, let's focus on the three main forms of predictive analysis:

#### Predictive:

The most well-known segment of predictive analytics, this type of software does what its name implies: it predicts, particularly in reference to a single element. Predictive models search for correlations between a particular unit of measurement and at least one or more features pertaining to that unit. The goal is to find the same correlation across different data sets.

#### Descriptive:

Whereas predictive modeling searches for a single correlation between a unit and its features – in order to predict the likelihood of a customer switching insurance providers for example – descriptive modeling seeks to reduce data into manageable sizes and groupings. Descriptive analytics works well for helping to summarize information, such as unique page views or social media mentions.

#### Decision:

Decision analytics take into account all the factors related to a particular decision.

Decision analytics predict the cascading effect a particular action will have across all the variables involved in making that decision. In other words, decision analytics gives businesses the concrete info they need to take action.

#### MapReduce

The processing arm of the Hadoop framework, MapReduce processes data in its storage location rather than transporting the data across a server to the location of the processing software. MapReduce then only transfers the finished analysis, which are much smaller files than the large datasets MapReduce is analysis, back to the software location for reporting. And because Hadoop works as a cluster system, MapReduce is able to to analyse data across multiple servers.

#### **Text Analytics**

Synonymous with text mining, text analytics software combs unstructured data to find patterns hidden within large sets of text data. This type of data is usually difficult to analyze with traditional mining methods. Text analytics are particularly interesting for businesses that work with social media. Using the right software, a business can set up a rule for the software to track certain words or phrases – a business's name for example – to find patterns in how they're being mentioned.

#### The Different Types of Data

Data comes in three main forms: structured, semistructured, and unstructured. Unstructured data is the most common, and includes text documents and other types of files that don't have an easily readable formats (for a computer at least). It's widely accepted that the vast majority of data that businesses produce - as much as 85% (http://breakthroughanalysis.com/2008/08/01/unstructured-data-and-the-80-percent-rule/) - comes in an unstructured form.

Unstructured data can't be stored in rows or columns, which makes it impossible for traditional data mining software to analyze. However, utilizing this data is often crucial to figuring out how to move forward. With so much data stored in unstructured form, text analytics should be a key consideration when trying to find the *best business intelligence software*.

#### Reporting

The previous two applications dealt with the mechanics of business intelligence. How business data are stored, and how these data are refined into meaningful intelligence. Business intelligence reporting focuses on the presentation of these findings.

#### **Online Analytical Processing**

Most often used with multidimensional databases, online analytical processing (OLAP) enables users to query data warehouses and create reports that view data from multiple perspectives, say by monthly sales or by number of transactions for a particular item.

OLAP allows users to interact with data in three ways: consolidation, drill-down, and slicing and dicing. Consolidation gathers data from multiple dimensions and helps users anticipate trends. Contrastingly, drill-down navigates down into more specific areas of analyses. Finally, OLAP's slice and dice functionality lets BI professionals exclude and include certain data in their analysis.

#### **Data Visualization**

One of the more popular trends in BI, data visualization

(https://technologyadvice.com/data-visualization/) allows companies to graphically display the results of data mining or other analytics. As part of a broader shift towards better BI usability, the data visualization UX may become a larger factor in the software purchasing decision.

#### **Dashboards**

Another, albeit narrower, form of data visualization, dashboard functionality refers to the interface that represents specific analyses. Dashboard software is another segment of business intelligence software that's growing in popularity due to demand for better BI interfaces.

#### State of the Market

The state of business intelligence is changing. Far from a misunderstood buzzword, BI is being implemented in a number of different organizations to great effect.

In TDWI's latest survey

(http://www.pentaho.com/sites/default/files/uploads/resources/tdwi\_best\_practices\_report\_managing\_big\_data.pdf?

mkt\_tok=3RkMMJWWfF9wsRonv6%2FKdO%2FhmjTEU5z17u4oUaG0gokz2EFye%2BLIF

- 57 percent of respondents had standardized one or more BI applications throughout their business
- 38 percent reported that they are not using business intelligence in their organization at all
- 89 percent see big data and BI as an opportunity
- 11 percent see Bl as a problem.

Another survey by InformationWeek found:

- 44 percent of companies list predicting customer behavior as the biggest factor driving their interest in big data
- 58 percent say accessing timely, reliable data stands as their biggest information management obstacle
- 67 percent are interested in using business intelligence software in their business

Forrester's research (http://www.computerweekly.com/opinion/Forrester-Best-practice-tips-for-business-intelligence-success) provides some insight into how successful businesses have been in implementing BI:

- 54 percent of respondents claimed BI helped them make better business decisions
- 39 percent rated BI successful for monitoring process performance
- However, only 28 percent reported that BI had helped them gain a competitive advantage

So while the number of organizations who have adopted business intelligence and gained a competitive advantage remains in the minority, the percentage of organizations that have derived a perceivable competitive advantage remains low.

One of the most difficult areas of implementing business intelligence lies in finding the proper expertise, with 47 percent of the InformationWeek respondents claiming finding employees with the proper data skills as their biggest holdup to implementation.

#### **Trends**

#### In Memory Processing

In-memory processing utilizes RAM instead of disk or hard drive processing in order to read information. Accessing information in this manner increases the application performance exponentially, perhaps even into the hundreds of times. The increasing power of RAM in our computing environments coupled with the demand for more agile systems, all lead to In-Memory Processing software having a large stake in the future of BI.

In-Memory Processing was originally introduced in the 1990s, but dramatic drops in memory prices are making it a more popular option to running analysis through multidimensional databases and cubes.

#### **Usability and Visualization**

More and more, BI users aren't IT staff; they're employees with a standard amount of technological savvy that want to harness the power of BI to get a competitive advantage. Consequently, the design of reporting mechanisms and ease of use of analytics functions are being driven toward a lower barrier of access. No longer is it simply enough to have excellent analysis or data warehousing (https://technologyadvice.com/data-warehousing/) features; they must not be usable for employees who fall somewhere in the middle of BI layperson and the data expert in the IT department.

In 2013, many of the major BI vendors - SAP, IBM, Microsoft, and SAS - all responded to the uprising of new, smaller companies that offered easy to use visual function by totally redesigning their interfaces. Further, TDWI's research found that 63 percent of the time, big data analysis is used by departments other than IT.

(http://www.pentaho.com/sites/default/files/uploads/resources/tdwi\_best\_practices\_report\_managing\_big\_data.pdf?

mkt\_tok=3RkMMJWWfF9wsRonv6%2FKdO%2FhmjTEU5z17u4oUaG0gokz2EFye%2BLIF Several vendors are specializing in the 'self-service' BI space, including Tableau (https://technologyadvice.com/products/tableau-reviews/) and TIBCO Spotfire (https://technologyadvice.com/products/spotfire-tibco-reviews/), which we compare in our post: Tableau vs Spotfire (https://technologyadvice.com/blog/information-technology/tableau-vs-spotfire-business-intelligence-for-the-non-it-guru/).

#### **Business Intelligence in Action: O2 Ireland**

Business intelligence is great for sifting through data to find patterns or insights about your customers. The key involves centralizing the information in a data warehouse before its analysed, so the data is cleaned and formatted properly.

O2 Ireland, a cell phone carrier, noticed that a number of its customers would buy prepaid SIM cards and leave the country a few days after the purchase. From a business perspective, the company wanted to get the most out of its relationships with its customers, but it needed to know which ones to target.

#### O2 Ireland had the same data problems

(http://www.computerweekly.com/news/2240182807/Telefonica-Ireland-uses-business-intelligence-to-reduce-churn) that plague many businesses today: a number of systems were capturing data, but the data wasn't unified, and had little overall management.

"The upshot was a very high-cost IT infrastructure, decisions that didn't make sense, and data latency. An event may be analysed up to 10 days after it happened, by which time the opportunity to do anything was very limited," said head of business intelligence Peter McKenna.

O2's first step was to create a central data environment, i.e., a data warehouse. Using Teradata as a vendor, O2 funnelled all of its disparate data into one application, making it simpler to perform queries and analysis. Once the data warehouse was built, O2 turned to Cognos for its business intelligence tool.

By running a series of analysis throughout the now centralized data, O2 was able to segment the 65 percent of their customers who stayed in the country after they purchased SIM cards, and who therefore merited a heavier investment than the other 35 percent who left the country shortly after their purchase.

Based off this intelligence O2 was able to launch location specific marketing that's been successful in driving foot traffic to brick and mortar locations during peak buying periods, such as Christmas. O2 is an excellent example of implementing business intelligence with a business goal in mind. Instead of focusing solely on the technology, they focused on what the technology could do for their business.

8/1/2019

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US Serial Number: 86768173 Application Filing Sep. 25, 2015

Date:

US Registration 4986835 Registration Date: Jun. 28, 2016

Number:

Filed as TEAS Yes Currently TEAS Yes

Plus: Plus:

Register: Principal

Mark Type: Service Mark

TM5 Common Status Descriptor:



LIVE/REGISTRATION/Issued and Active

The trademark application has been registered with the Office.

Status: Registered. The registration date is used to determine when post-registration maintenance documents are due.

Status Date: Jun. 28, 2016

Publication Date: Apr. 12, 2016

#### **Mark Information**

Mark Literal FOCUSMD FOCUS ON QUALITY. FOCUS ON CARE.

Elements:

Standard Character No

Claim:

Mark Drawing 3 - AN ILLUSTRATION DRAWING WHICH INCLUDES WORD(S)/ LETTER(S)/NUMBER(S)

Type:

Description of The mark consists of the wording "FOCUS MD" with the word "FOCUS" in dark blue and "MD" in light blue followed by a dark blue

Mark: semi-circle over a light blue chevron, under this wording and design is the wording "FOCUS ON QUALITY. FOCUS ON CARE." in dark

blue.

Color Drawing: Yes

Color(s) Claimed: The color(s) dark blue and light blue is/are claimed as a feature of the mark.

Disclaimer: "MD"

Design Search 26.17.09 - Bands, curved; Lines, curved; Curved line(s), band(s) or bar(s); Bars, curved

Code(s):

#### **Goods and Services**

#### Note:

The following symbols indicate that the registrant/owner has amended the goods/services:

• Brackets [..] indicate deleted goods/services;

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For: Business knowledge management services; Business management services, namely, administration of business engaged in

accountable care; Medical billing for health care providers; Medical billing support services; Outsourcing services in the nature of

arranging service contracts for others in the field of provider reimbursements

International 035 - Primary Class U.S Class(es): 100, 101, 102

Class(es):

Class Status: ACTIVE

Basis: 1(a)

#### **Basis Information (Case Level)**

Filed Use: Yes Currently Use: Yes

 Filed ITU:
 No
 Currently ITU:
 No

 Filed 44D:
 No
 Currently 44E:
 No

 Filed 44E:
 No
 Currently 66A:
 No

 Filed 66A:
 No
 Currently No Basis:
 No

Filed No Basis: No

## **Current Owner(s) Information**

Owner Name: FocusMD Holdings, LLC

Owner Address: 129 Bridle Trail

Venetia, PENNSYLVANIA UNITED STATES 15367

Legal Entity Type: LIMITED LIABILITY COMPANY

State or Country PENNSYLVANIA

Where Organized:

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Domestic Representative - Not Found

## **Prosecution History**

Date	Description	Proceeding Number
Jun. 28, 2016	REGISTERED-PRINCIPAL REGISTER	
Apr. 12, 2016	OFFICIAL GAZETTE PUBLICATION CONFIRMATION E-MAILED	
Apr. 12, 2016	PUBLISHED FOR OPPOSITION	
Mar. 23, 2016	NOTIFICATION OF NOTICE OF PUBLICATION E-MAILED	
Mar. 08, 2016	LAW OFFICE PUBLICATION REVIEW COMPLETED	68552
Mar. 04, 2016	APPROVED FOR PUB - PRINCIPAL REGISTER	
Mar. 04, 2016	TEAS/EMAIL CORRESPONDENCE ENTERED	88889
Mar. 03, 2016	CORRESPONDENCE RECEIVED IN LAW OFFICE	88889
Mar. 03, 2016	TEAS REQUEST FOR RECONSIDERATION RECEIVED	
Feb. 24, 2016	NOTIFICATION OF FINAL REFUSAL EMAILED	
Feb. 24, 2016	FINAL REFUSAL E-MAILED	
Feb. 24, 2016	FINAL REFUSAL WRITTEN	72414
Feb. 04, 2016	TEAS/EMAIL CORRESPONDENCE ENTERED	68552
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Feb. 01, 2016	ASSIGNED TO LIE	68552
Jan. 21, 2016	TEAS RESPONSE TO OFFICE ACTION RECEIVED	
Jan. 14, 2016	NOTIFICATION OF NON-FINAL ACTION E-MAILED	6325
Jan. 14, 2016	NON-FINAL ACTION E-MAILED	6325
Jan. 14, 2016	NON-FINAL ACTION WRITTEN	72414
Jan. 14, 2016	ASSIGNED TO EXAMINER	72414
Oct. 01, 2015	NOTICE OF DESIGN SEARCH CODE E-MAILED	
Sep. 30, 2015	NEW APPLICATION OFFICE SUPPLIED DATA ENTERED IN TRAM	
Sep. 29, 2015	NEW APPLICATION ENTERED IN TRAM	

## TM Staff and Location Information

TM Staff Information - None File Location

Current Location: PUBLICATION AND ISSUE SECTION Date in Location: Jun. 28, 2016

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Int. Cl.: 35

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NO CLAIM IS MADE TO THE EXCLUSIVE RIGHT TO USE "MD", APART FROM THE MARK AS SHOWN.

THE COLOR(S) DARK BLUE AND LIGHT BLUE IS/ARE CLAIMED AS A FEATURE OF THE MARK.

THE MARK CONSISTS OF THE WORDING "FOCUS MD" WITH THE WORD "FOCUS" IN DARK BLUE AND "MD" IN LIGHT BLUE FOLLOWED BY A DARK BLUE SEMI-CIRCLE OVER A LIGHT BLUE CHEVRON, UNDER THIS WORDING AND DESIGN IS THE WORDING "FOCUS ON QUALITY. FOCUS ON CARE." IN DARK BLUE.

SER. NO. 86-768,173, FILED 9-25-2015.

SUE LAWRENCE, EXAMINING ATTORNEY



Michelle K. Zen Director of the United States Patent and Trademark Office

## REQUIREMENTS TO MAINTAIN YOUR FEDERAL TRADEMARK REGISTRATION

WARNING: YOUR REGISTRATION WILL BE CANCELLED IF YOU DO NOT FILE THE DOCUMENTS BELOW DURING THE SPECIFIED TIME PERIODS.

Requirements in the First Ten Years\* What and When to File:

First Filing Deadline: You must file a Declaration of Use (or Excusable Nonuse) between the 5th and 6th years after the registration date. See 15 U.S.C. §§1058, 1141k. If the declaration is accepted, the registration will continue in force for the remainder of the ten-year period, calculated from the registration date, unless cancelled by an order of the Commissioner for Trademarks or a federal court.

**Second Filing Deadline:** You must file a Declaration of Use (or Excusable Nonuse) **and** an Application for Renewal between the 9th and 10th years after the registration date.\* **See** 15 U.S.C. §1059.

Requirements in Successive Ten-Year Periods\*
What and When to File:

You must file a Declaration of Use (or Excusable Nonuse) and an Application for Renewal between every 9th and 10th-year period, calculated from the registration date.\*

#### **Grace Period Filings\***

The above documents will be accepted as timely if filed within six months after the deadlines listed above with the payment of an additional fee.

\*ATTENTION MADRID PROTOCOL REGISTRANTS: The holder of an international registration with an extension of protection to the United States under the Madrid Protocol must timely file the Declarations of Use (or Excusable Nonuse) referenced above directly with the United States Patent and Trademark Office (USPTO). The time periods for filing are based on the U.S. registration date (not the international registration date). The deadlines and grace periods for the Declarations of Use (or Excusable Nonuse) are identical to those for nationally issued registrations. See 15 U.S.C. §§1058, 1141k. However, owners of international registrations do not file renewal applications at the USPTO. Instead, the holder must file a renewal of the underlying international registration at the International Bureau of the World Intellectual Property Organization, under Article 7 of the Madrid Protocol, before the expiration of each ten-year term of protection, calculated from the date of the international registration. See 15 U.S.C. §1141j. For more information and renewal forms for the international registration, see http://www.wipo.int/madrid/en/.

NOTE: Fees and requirements for maintaining registrations are subject to change. Please check the USPTO website for further information. With the exception of renewal applications for registered extensions of protection, you can file the registration maintenance documents referenced above online at <a href="http://www.uspto.gov">http://www.uspto.gov</a>.

NOTE: A courtesy e-mail reminder of USPTO maintenance filing deadlines will be sent to trademark owners/holders who authorize e-mail communication and maintain a current e-mail address with the USPTO. To ensure that e-mail is authorized and your address is current, please use the Trademark Electronic Application System (TEAS) Correspondence Address and Change of Owner Address Forms available at <a href="http://www.uspto.gov">http://www.uspto.gov</a>.

## FocusMD at a Glance

#### What We Do

- Facilitate provider participation with ACOs
  - Contractual review
  - Workflow consultation
  - > EHR optimization
  - Proactive patient outreach
  - Measure performance tracking
- Provide IT tools to automate process
  - Customized interfaces to support bidirectional data feed
  - Built in measure tracking to identify gaps in care
  - Data aggregation with claims and clinical inputs
  - Real time Dashboards for provider feedback

#### **Experience in Value Based Reimbursement**

- Software tools created by an internal medicine doctor for improved quality reimbursement
- Routinely utilized to increase level rating of PCMH
- Demonstrated success in a variety of value based reimbursement programs

## Why We Do It

Changing reimbursement models

Limited IT infrastructure in place at provider level

Misconceptions of Accountable Care benefits

Challenging environment for provider engagement

#### **Results We Deliver**

- Improved value based reimbursement
- Improved provider and patient engagement
- Increased participation in value based programs
  - PCMH
  - ACO
  - Meaningful Use
  - PQRS

#### **Contractual Review**

- ✓ IT contract expertise
- ✓ Extensive contact breakdown
- ✓ Complete liability review

#### **Workflow Consultation**

- ✓ Assessment of existing systems
- ✓ Corrections of care Gaps
- ✓ EHR data entry guidance

## **EHR Optimization**

- ✓ Claims data review
- ✓ Data field modification
- √ Template configuration

#### **Proactive Patient Outreach**

- ✓ Focus on Gaps in Care
- ✓ Integrated scheduling
- ✓ Patient education
- ✓ Proactive monitoring

## **Measure Performance Tracking**

- ✓ Customized measure alerts
- ✓ Automated performance gaps
- ✓ Regular quality reviews
- ✓ Patient targeted solutions

## Partnership-Driven

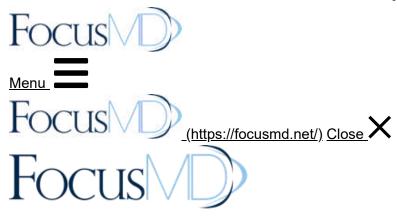
 Accessible, responsive, and consultative to address your unique quality configurations and needs

## Superior Technology

- Data aggregation platform tuned for population health and quality
- Hundreds of interfaces with leading HIT systems
- Data-agnostic, open API, open platform
- Patient-centered and provider-focused
- Cloud-based, robust, easy-to-use analytics
- Clinical rules engine focused on quality measures
- · Community-aware data security model
- Certification-intense
- Continual investment and clear product roadmap







- Home (https://focusmd.net/)
- The Vision (https://focusmd.net/the-vision/)
- Solutions (https://focusmd.net/solutions/)
  - Overview (https://focusmd.net/solutions/overview/)
  - o Revenue Cycle Management (https://focusmd.net/solutions/rcm/)
  - o Medical Software Management (https://focusmd.net/solutions/msm/)
  - Population Health Management (https://focusmd.net/solutions/phm/)
- Clients (https://focusmd.net/clients/)
- Company (https://focusmd.net/company/)
  - Overview (https://focusmd.net/company/mission-history/)
  - <u>Leadership Team (https://focusmd.net/company/leadership-team/)</u>
  - Solution Teams (https://focusmd.net/company/solution-teams/)
  - o Careers (https://focusmd.net/company/careers/)
- Resources (https://focusmd.net/resources/)
- Contact (https://focusmd.net/contact/)

## Medical Software Management

Accurate, reliable, intuitive solutions that deliver powerful patient outcomes.

Today's average practice demands at least two software applications to operate efficiently. A good Practice Management (PM) system and a good Electronic Health Record (EHR) platform are both necessary to comply with the newest regulations, MACRA/MIPS.

## **Practice Management**

Simplify patient management and revenue cycle from scheduling, registration, billing, claims management, collections and much more with a proven, full-featured medical practice management solution, MicroMD PM.

MicroMD PM is an affordable and practical management choice. Based on more than 25 years of innovation, MicroMD is an easy-to-learn solution that yields proven returns and is scalable enough to support changing practice needs.

## **Electronic Health Record Software**

Full-featured and customizable EHR software helps practices improve clinical productivity and enhance care for your patients. Allowing doctors to get back to the business of taking care of patients.

Let FocusMD allow you to get back to the business of seeing patients by utilizing tools that will allow you simplify workflow, analyze productivity, KPI's and allowing us to provide the support resources needed to make your day to day duties simpler.

- Overview (https://focusmd.net/solutions/overview/)
- Revenue Cycle Management (https://focusmd.net/solutions/rcm/)
- Medical Software Management (https://focusmd.net/solutions/msm/)
- Population Health Management (https://focusmd.net/solutions/phm/)

#### **Reporting & Analytics**

Gain operational and financial insight utilizing the MicroMD reporting tools. Analyze productivity, track key performance indicators, create dashboards and much more.

#### Cloud-Based

In addition to the traditional client server approach, MicroMD PM & EHR solutions are available as a cloud-based model. We host your software & data at our secure data center, freeing you from the cost of maintaining servers and disaster recovery.

## **Support & Training**

Our team is dedicated to your success and to service and support. From implementation, to software training and support we are a local team here to assist you with all your needs. We are a phone call away for a live person to answer your questions. We are here when you need us!

#### **Interfaces & Conversions**

Our custom interface development can help you connect with a hospital or lab and we can also assist you in bridging the data gap from your prior PM and/or EMR system with a data conversion.

#### **eServices**

MicroMD's integrated eServices are designed to increase your practice's efficiency so that you can get back to doing what you do best – healing. Our consultative approach means that we specifically assess your practice to determine which products will increase your efficiency while saving you money!

## What Our Customers Say

"Having worked with FocusMD on their Practice Management software, it was natural to upgrade to their EMR. FocusMD made this transition as smooth as possible. Their staff really has a lot of experience in this space and it was refreshing getting such an expert to help install, implement, and train on this new operational process. The biggest benefits we have gained with partnering are operational efficiencies. This was a wonderful experience and I would recommend FocusMD for any of the services they offer."

Urology Group Central OH



## **Partners**



#### **Appointment Reminder Systems**

<u>AutoRemind (http://www.autoremind.us/)</u> develops affordable fully automated reminders, delivered via voice/email/text, that will improve your operations, increase revenues and reduce costs.



#### Clearinghouse

<u>Practice Insight (https://www.practiceinsight.net/)</u> electronic data interchange (EDI) software. Paperless claims processing, status reporting and rejection analysis tools eliminate the need to print and re-work outstanding claims based on cryptic reporting from payers. Practice Insight is a productive and reliable EDI solution for your practice. No matter what your practice size, Practice Insight offers the functionality and support to help you maximize the efficiency of your billing and accounts receivable.



## **Reporting Analytis**

<u>dashboardMD</u> (https://dashboardmd.com/) provides a turn-key Business Intelligence Reporting Suite which includes Scheduled Reports pushed via email, Daily Dashboards, Scorecards, Alerts and an industry leading Ad Hoc Analysis Tool.



#### **Credit Card On File & Online Patient Payment Portal**

<u>InstaMed (https://www.instamed.com/)</u> is healthcare's most trusted payments network, connecting providers, payers and consumers on one platform. The InstaMed Network connects over two-thirds of the market and processes tens of billions of dollars in healthcare payments annually. InstaMed reduces the risks, costs and complexities of working with multiple payment vendors by delivering one platform for all forms of payment in healthcare, designed and developed on one code base and supported by one onshore team of experts in healthcare payments. InstaMed enables providers to collect more money from patients and payers while reducing the cost and time to collect.



#### **Fax Solution**

MicroMD Interfax (https://www.micromd.com/eservices/interfax/) is a MicroMD EMR-integrated outbound and inbound web-based fax solution that allows practices to securely, efficiently and cost-effectively send, receive and manage electronic faxes. Interfax allows practices to reduce expenses by eliminating the need for a traditional fax line. Users save on the costs associated with printing documents to paper and faxing with a traditional stand-alone paper fax machine, as well as eliminating the cost of fax equipment, maintenance, paper and toner. Reduce the time it takes to scan and file paper faxes. Interfax allows users to fax directly into MicroMD EMR so that staff can quickly view and assign a fax to a patient, as well as alert users to fax availability with just a few simple clicks. Providers or staff can securely fax encounter notes and procedure.



## **Speech Recognition**

<u>Dragon (https://www.nuance.com/dragon.html)</u> is a premiere speech recognition software, in use by over 60,000 physicians nationwide. 1450, Inc., through its gold certified value added resellers specializes in integration of Dragon Medical software with EMRs such as MicroMD.



## **Statement Processing**

<u>RevSpring (https://revspringinc.com/)</u> provides an array of patient billing statement solutions designed to enhance productivity and reduce billing operation costs. RevSping has many years of experience in electronic patient statement printing and mailing technology for medical billing companies, physician groups and other healthcare providers.



Are you looking for a full featured Practice Management and EHR that is easy to use, intuitive and can help you achieve your MIPS goals?

FocusMD can help! Our dedicated support and implementation team can help make the process simple and smooth. Call for a demo today!

#### Contact Us (http://focusmd.net/contact/)

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- Population Health Management (https://focusmd.net/solutions/phm/)



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