



# Richard Carlton Consulting

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## FILEMAKER SUCCESS STORY

### Environmental & Civil Engineering

Walnut Creek, CA

#### AEI Consultants - Customer Story at a Glance

##### The Challenge

- \* Immediate needs for new database.
- \* Molded to meet operations of the business.
- \* Knowledge or support unavailable.

##### The Solution

- \* Reverse engineering.
- \* Designed matching FileMaker system.
- \* Identify multiple pain points.
- \* Replace redundant reports.

##### The Benefits

- \* New design outweighs old system in speed.
- \* Solid and simple development.
- \* Customized.

##### Products Used

- \* FileMaker Pro Client/ no plug-ins.

##### Platform

- \* FileMaker Server 9
- \* FileMaker Client 9

AEI came to Richard Carlton Consulting with an immediate need for a new database to fulfill the role occupied by their current system. Employees had difficulty in using the original database and addressing issues, leaving many to be unresolved. When the RCC team stepped in, they found that the original system was comprised of a MySQL back end and a MS Access front end. No relational or automation information could be ascertained in the MS Access. This system was incomplete in that only a locked down version had been provided, showing only which fields were on the layout.

With no internal knowledge or support for the process, RCC began to reverse engineer the old system to map data correctly to the new system. MySQL database was backed up on a regular basis by RCC. Data was exported, cleaned, parsed and imported into the new FileMaker database. The designed matching FileMaker system provided a stronger data structure for future proofing of the database. Multiple pain points were identified throughout the process, which were resolved. Scores of redundant reports were replaced with intuitive summary screens filled with data cached nightly to provide immediate response to financial and other queries. The system needed to be carefully molded to the operations of AEI's daily business.

An advanced system allowed for thirteen unique permission sets. Each set was given a home screen tailored to show the information that was pertinent to them. An intuitive calendar section was added which automatically displayed scheduled work to allow for fast access to all information by sales, production and management staff. After testing the system extensively, a bug-tracking database was provided at no charge, to ease the process of users submitting the issues. RCC remained on call well beyond normal warranty periods offered by other vendors to ensure a smooth transition.

AEI's employees that were trained to use the database found that it tremendously outweighed the old system in speed, usability and customization to AEI's business rules; it proved to be a simple and solid development. RCC's diligent efforts were appreciated through the difficult circumstances and were esteemed for going above and beyond the call of duty.

