

## Project Details

### Implementation

#### Requirements Overview

- ◇ Windows 2003 Server
- ◇ Hardware > 2 GHz, Dual Core CPU
- ◇ Memory > 2 GB RAM
- ◇ Microsoft SQL Server

Over the years, we have found that Implementation go quicker if the people working on the project understands this 'new' language and has an idea of what the project looks like.

When crossing departmental boundaries and touching people's jobs, the complexity of a project goes up dramatically. The following thoughts help with any enterprise project.

#### Keys to a Successful Enterprise Project

##### **Envision the Solution**

You will improve your chances of success if you can create a vision of the solution and can explain it well to others on the project.

##### **Identify a Champion**

Successful enterprise projects have one thing in common – a champion. This person is likely to be well respected or have a title. They will be the internal sales person for the project.

##### **Identify a Project Manager**

As you might imagine, a good project manager can make or break a project.

##### **Select a Cross Functional Team**

Since this project crosses departmental lines, it is in your best interest to get representation from each of the departments involved.

##### **Work within your Company's Politics**

Go with the flow by following your company's particular politics so that you don't create an audience that doesn't want you to succeed.

##### **Manage Corporate Change**

People hate change, make it easy for them. Get them involved early so that they can feel some ownership in the solution.

##### **Implement Existing Processes**

It is hard enough to get people to do their work electronically, don't make them change their processes as well. Implement their existing processes and then make improvements. You will have some metrics, so the changes will be easier.

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### Installation Pre-Requisites

#### Customer IT:

- Install a server on the network [provide machine name]
  - Minimum 2 GHz, dual CPU
  - Minimum 2 GB Ram
- Fresh install of Windows 2000 Server or Windows 2003 Server
- Install Microsoft IIS (for http and ftp services)
- Outlook or the name of an SMTP server that doesn't require authentication
- Install Microsoft SQL Server 7 or 2000
- Create the ability to connect a laptop to the network

#### Customer BPM Project Manager:

- Identify trainees for Admin training
- Identify initial set of users for initial install
- Identify a set of users and roles
  - User Names [login ids]
  - Departments
  - Email Addresses
- A list of document types [procedures, data sheets, etc.]
- A list of document formats in use [Word, PDF, Excel, etc.]
- A few sample documents to enter into the system
- Select the Flow that you wish to use – provide documentation
  - Detailed chart of the flow [Visio type diagram]
  - For each step in the flow [step name]
    - Who performs the tasks [attendees]
    - What tasks will be performed [services]
    - How long should the task take [timer]
    - Desired escalation path [timer]
    - Who can change the packet at this step [authorization]
    - Routing logic defined
    - What information is needed to perform this step
    - What information is created as a result of this step
- A copy of the current form being used [shows attribute fields]

**Ingenuus** - Ingenuus will create a specific Statement of Work based on the requirements of the Customer. That statement of work will address all of the issues on this and the following page and put dates the activities.



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## Installation

### Ingenuus:

- Install Ingenuus Software on all Servers
- Configure blank database
- IT Administration Training
- System Configuration [add users]
- Turn on Test Server
- Train the Trainer Training
- Flow Designer Training
- Meet with ERP Admin [if integrating with ERP]
- Configure Flat File Gateway [if integrating with ERP]
- Complete Bulk Load [if integrating with ERP]

### Ingenuus & Customer:

- Administrator Training
- Initial Process Flow Configuration
- Review Process Flow with key Constituents
- Flow Configuration
- Bulk Load Test [if integrating with ERP]
- Test System
- Import / Export Testing [if integrating with ERP]
- Prepare and Test Production Server
- Freeze ERP – Export from ERP/Import to Ingēnuus [if integrating with ERP]
- End User Training

### Customer:

- Go Live
- Process Flow Optimization



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