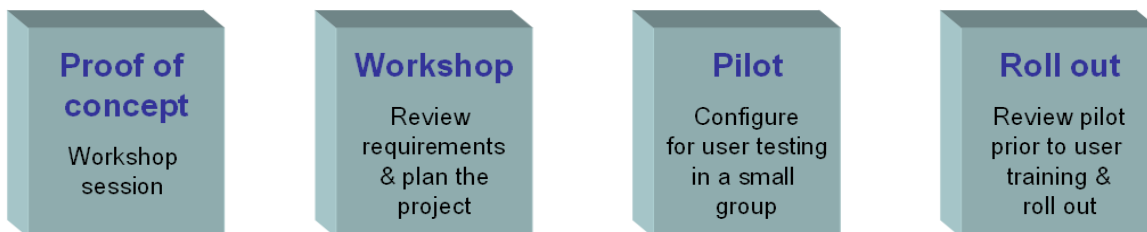


This is how we implement our resource management software for more complex organizations, such as those with a matrix of project and resource managers. The methodology is based on 15 year's experience and ensures a rapid and low risk implementation. The amount of Innate assistance required ranges from 4 to 10 days for resource pools of less than 100, through to 20 plus days for larger, more complex organizations. Small, timesheet only systems require even less effort.

The key steps are:



1 Proof of concept

Prospective clients often wish to examine the resource management software in some detail before making a decision to proceed. However, it is only towards the end of the Pilot phase that the software will be configured appropriately for their requirements.

A proof of concept workshop examines how the software can address specific requirements or concerns; its aim is to justify a positive recommendation to proceed.

2 Implementation workshop

This is the starting point for system implementation. It reviews the requirements and scopes the implementation project. Check lists are used to document decisions, software settings and action items.

The issues that need to be addressed are.

1. Understanding the business objectives for the system.
2. Documenting the required process steps.
3. Clarifying roles and responsibilities, so that data access permissions can be defined, etc.
4. Identifying data requirements and sources.
5. Defining reporting requirements.
6. Integration with other systems.
7. Identify training requirements.
8. Planning the implementation project.

More complex requirements will need to be documented in some detail and agreed early on. Innate favours the 'Agile' approach, involving a series of prototype and review cycles. This allows the client to develop their requirements as more information on system capabilities is understood, a process that tends to provide greater client satisfaction with the system.

Attendees should include representatives of the key stakeholders, typically, project, program and resource managers, and those who will administer and support the system.

3 Pilot

Prior to roll out we recommend setting up a system in a test environment so that a small group of users can test the system over a limited period. This will:

- Check that the system set up best matches the requirements, and identify any necessary changes.
- Identify areas and processes that may need further work, prior to roll out.

3.1 Environment

It is important to do the initial set up in a non - operational environment for thorough testing and evaluation, before the system goes live. We recommend that this test environment is retained to check out any subsequent changes to configuration, or software upgrades, before being applied to the live system. Innate has a Pre - Installation Questionnaire that checks the suitability of the client's IT environment. Client IT resource will be required during installation and set up. Either Oracle or SQL Server can be used as the database.

3.2 System installation and configuring.

The Innate software is highly configurable, and can provide a good match to each client's requirements, including:

1. Data requirements for projects, tasks, resources and assignments - by incorporating additional fields in the database and modifying the data admin screens, etc.
2. How resources are to be categorized in terms of skills and proficiencies, and their working patterns and calendars.
3. Detailed support for specific process steps, such as requests for staff allocation.
4. Permission settings for controlling user access to data.

3.3 Data collection.

The client should provide input documents and spreadsheets of data; we can directly import data from spreadsheets and existing Microsoft Project plans. Once the data has been loaded on to the system, the providers review it for accuracy and sign it off. Templates for new projects can be set up.

The definition of skill sets can be a complex and time consuming area, particularly in large organizations. Unless skill and proficiency data is already in place, we recommend starting with a simple classification.

3.4 Reports

Innate provides a range of easily configurable reports, with a reports editor for more comprehensive layout changes. We compare the client's reporting requirements with these capabilities; more complex requirements can be addressed with Innate's report writing services.

3.5 Integration with other systems

Innate resource management software has excellent facilities for the managed transfer of data with other systems. Such integration requirements need to be specified in detail so that Innate can provide the appropriate routines. For example, export of hours booked via csv files uses a two phase commit process that reliably handles late timesheets. More complex database integration can be provided using the Innate Integrator module.

3.6 User testing

Workshop training sessions enable the pilot users to examine how well the system meets the requirements. Issues are logged for review with Innate. Required system or process changes should be agreed and incorporated prior to roll out.

4 Roll Out

4.1 Install live system

There are two components to installing Innate; server based software and, if using Microsoft Project, Innate client add-in components. The client add-in needs to be installed on all PC's where Microsoft Project will be used.

4.2 Training

Training will be required for administrators, plan owners and resource owners. Innate strongly recommends that customized training material is developed for the more complex implementations, so that use of the system will support the client's particular process steps. The key users need comprehensive training, which is best delivered jointly by client and Innate staff. For more simple implementations, Innate can train a member of the Project Office in how to train the users.

4.3 System administration

System administration is not onerous, but user's demand for support is normally high following roll out of a new system. The Administrator should act as the internal point of contact for all system queries and be the prime point of contact with Innate, so that their system expertise builds rapidly. A compatible test environment should be retained to check out software upgrades and any fixes. After implementation, Innate's support process reliably handles client issues and the support site provides technical information and product updates.

Success criteria

There are a number of criteria that help to ensure the success of implementations.

Implementation is a project

For some organizations with simple needs and process, the effort to implement Innate will be small; whatever the size, implementing Innate should be treated as a serious project. Potential risks should be identified and appropriate project disciplines applied. The client should appoint a project manager as soon as possible, ideally before the order is placed with Innate. They need to identify the key project deliverables, risks and issues and ensure that there are regular reviews of these with Innate

Sponsor and Steering Group

It is essential to have a sponsor at the appropriate level within the organization to champion the system, and ensure that the required internal resources are made available. If the implementation covers more than a single department it is important to have a steering group to make the decisions that will affect multiple areas and to facilitate the inter-working of the various groups involved.

Communication

Effective communication with all parties is vital for a successful implementation. All resources involved, whether plan owners, resource owners or the resources being managed, need to know and understand the processes involved and why the system is being implemented. There needs to be appropriate communications at all stages of the implementation. We recommend issuing a document to all staff saying what's being done, reasons why, and details of any information that they will be required to provide and sign off.

Innate services:

Innate provides a comprehensive range of implementation services, including:

- Project Management
- System Installation and Configuration
- Technical and User Training
- Report Design
- Integration with other systems, typically Accounts and HR

After implementation, our support team provides a first class service. A proven support process reliably handles client issues and the Support site provides technical information and product updates.

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