



RecFind 6 Installation Steps

Key Steps for Every Customer

Task	Description	Responsibility?	Est. Man-days
1	Dialogue between K1Corp and customer about the customer's needs	K1Corp & Customer	10
2	Provide detailed proposal to customer, including prerequisites	K1Corp	3
3	Review and accept K1Corp offer	Customer	5
4	Order RecFind 6 software and services	Customer	1 to 2
5	Prepare RecFind 6 server environment, hardware and operating system and SQL Server. Order servers, system software etc.	Customer	5
6	Ship RecFind 6 software to customer	K1Corp	1
7	Install RecFind 6 server software, both production and test sites, on new RecFind 6 server(s)	K1Corp or Customer	1 to 2
8	Install RecFind 6 client software *Actual days depend on number of users and the clients selected (i.e., a mix of 'smart' and 'web' clients).	K1Corp or Customer	1 to 2
9	Test RecFind 6 server and client software	K1Corp or Customer	2
10	Onsite Conversion consultancy to determine what is to be captured (e.g., physical information, electronic information, Business Classification Scheme, Retention Schedule, etc., etc.)	K1Corp & key Customer staff	5 to 10

	and imported into RecFind 6. Determine best tools (e.g., Xchange) and data mappings. *Whether or not a separate conversion consultancy is required depends on the situation at each customer.		
11	Onsite pre-implementation consultancy. What do you have to bring across to RecFind 6? How do you do things now? How would you like to improve your operation? What changes would you like to make to the Data Model or your business processes? What systems do you want RecFind 6 to integrate to? How do you want the integration to work?	K1Corp & key Customer staff	5 to 10
12	Trial conversion of existing data and standards to the RecFind 6 test system. This step relies on the results of step 10 and/or step 11.	K1Corp & key Customer staff	3 to 5
13	Onsite pre-training consultancy – K1Corp consultant to review RecFind 6 converted test system and prepare it to be used as a training database.	K1Corp	1 to 2
14	Prepare training room for RecFind 6 training course (setup workstations, ensure RecFind 6 software is installed and operating correctly, etc., etc.).	K1Corp or Customer	1
15	Train Customer's core staff – RecFind 6 user & Admin so they are aware of the functionality and capabilities of RecFind 6 (a prerequisite to the next step) and can then engage in a meaningful discussion with the K1Corp consultant during the Implementation consultancy step.	K1Corp & Customer core staff	3 to 4
16	Onsite Implementation consultancy (feeding off results of the pre-implementation consultancy). Decide how to configure RecFind 6. Make changes to RecFind 6 test system using the DRM; prototype how you would like it to look and work. Configure the UI to the needs of each class of user.	K1Corp & Customer core staff	3 to 5
17	Approve and sign off RecFind 6 test system, conversion mappings and configuration changes.	Customer	2
18	Develop and agree integration strategy and processes. *Actual time depends upon each customer's unique integration needs	K1Corp & Customer core staff	3 to 5
19	Trial integration processes. *Actual time depends upon each customer's unique integration	K1Corp & Customer core	5 to 10

	needs	staff	
20	Approve and sign-off integration processes.	Customer	2 to 3
21	Schedule end-user training (has to happen just prior to cutover).	K1Corp & Customer core staff	1
22	Schedule live conversion (can only happen after end-users have been trained) and integration 'turn-on'.	K1Corp & Customer core staff	1
23	Train end users *Actual days depends on the number of staff to be trained	K1Corp & Customer end-user staff	2 to 10
24	Run live RecFind 6 conversion to production system and turn on integration processes. *Actual days depend upon the data and standards of each customer and the network and server resources applied.	K1Corp or Customer	2
25	Transfer RecFind 6 test system configuration changes (from earlier trial conversion) to RecFind 6 production system using K1Corp special tool.	K1Corp or Customer	1 to 2
26	Approve and sign off RecFind 6 production system	Customer	1 to 2
27	Cut over and go live monitoring performance and acceptance. Provide advice to end-users to ensure they are up and running and happy.	K1Corp & Customer core staff	2 to 5
28	Approximately 3 months later – Onsite Post implementation review. After the settling in period, what have we learned? What else do we need to change? Make 'tune-ups' as required using the DRM.	K1Corp & Customer staff	3 to 5

Notes:

1. The RecFind 6 system includes two licenses, one for production and one for testing and development. All initial work is done on the test system. The final conversion is done to the production system and then all approved configuration changes made to the test system are transferred to the production system using a special K1Corp tool (so you do not have to re-implement them on the production system).

2. There may be more than one trial conversion. It is often an iterative process where the customer needs to 'see' the effects of configuration changes. To be conservative, you may allow for two RecFind 6 trial conversions.
3. Whether or not we need step 10 and 11 or just step 11 depends upon the nature and volume of the data to be converted to RecFind 6 plus the complexity of the process.
4. The above is a general guideline only; K1Corp consultants will be able to provide more precise estimates once they are fully aware of your requirements.
5. The above schedule shows man-days not calendar days. The 'start-to-finish' time (calendar days) will always be longer than the sum of the man-days because of weekends, holidays and 'wait' time.
6. The above schedule also assumes that the RecFind 6 application will be run 'in-house', not hosted by K1Corp. If you want us to host the RecFind 6 system for you then the number of steps for the customer reduces and the process becomes easier.
7. Integration is always a difficult one to estimate because the processes and results are different for every customer. It is important to specify which systems you want RecFind 6 to be integrated to and the process involved. For example, do you want RecFind 6 'read' information from the other system or 'write' information to the other system?



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