

## K1CORP Implementation Methodology Overview

### Scope

This methodology applies to the installation and use of any K1CORP application software product. It is a proven (with hundreds of installations) method of successfully installing, configuring and 'going live' with a K1CORP product such as RecFind 6. Its greatest advantage is that it can be scaled up or down to suit the real world requirements of any project.

### Rationale

- Software as sophisticated as K1CORP's RecFind 6 cannot just be delivered with a 'good luck' note.
- The installation needs to be planned and managed as does any sophisticated IT project.
- K1CORP provides all of the tools and resources required to ensure a successful installation.
- The K1CORP methodology ensures that all costs and timeframes are known ahead of time.

### Components

1. K1CORP application consultant
2. Kick-off meeting
3. K1CORP Standard or modified training courses
4. K1CORP standard or modified consultancy modules
5. Data conversion service
6. Project plan
7. Project meetings

#### **1. K1CORP application consultant**

The K1CORP applications consultant is experienced in the installation of the K1CORP product, knows the software intimately and knows the industry (e.g. imaging, records management, electronic documents management, workflow, etc).

#### **2. Kick-off meeting**

This is where the project team is first nominated and the processes initiated to complete the project plan. Attendees should include:

- The K1CORP consultant

- The customer's project 'owner'. That is, the most senior executive responsible for this project.
- The customer's IT manager and/or Network manager.
- The customer's application manager (e.g., the records manager or imaging manager)
- At this meeting the project manager will be nominated. This can be an Application Manager from the customer or a professional project manager from K1CORP.
- Most importantly, the major objectives of the project are identified and agreed.

### **3. *K1CORP Standard or modified training courses***

K1CORP offer a range of standard application training courses (see <http://www.knowledgeonecorp.com/services/coursedescriptions.htm> ). Depending upon the customer's requirements these courses can either be run 'as is' or tailored to the customers unique needs.

### **4. *K1CORP standard or modified consultancy modules***

K1CORP offer a range of standard application consulting modules (see <http://www.knowledgeonecorp.com/services/preimplementation.htm>). Depending upon the customer's requirements these modules can either be run 'as is' or tailored to the customers unique needs.

### **5. *Data conversion service***

- Almost every project involves some form of data conversion; either from a physical or electronic form. It is important that all data to be 'converted' be identified early in the project cycle and agreement reached on how and when it is to be converted.
- K1CORP has a standard conversion consultancy module whereby the consultant identifies and specifies the data to be converted and prepares a data definition and data mapping report with recommendations on how and when the data should be converted. This report is presented to the project team for review and approval.
- Once approved and signed off the various tasks are assigned to both customer and K1CORP staff. The customer would normally have the task of backing up and then capturing the required source data. K1CORP would normally have the task of configuring Xchange for any conversion required.
- All conversions are 'iterative' processes and it is expected that there will be several 'runs' of the conversion (using representative test data) before all requirements are fully understood and satisfied. All conversion runs produce exception reports so that all 'records' not meeting specification are identified and can be review by the project team.
- When the project team signs off the Xchange configuration a test is done with the 'real' data to ensure that the representative test data was complete. Once the project team signs off the 'full' test conversion we re ready for the live run.
- If we are converting from a 'live'; production system we need to plan for that system being down or unusable for a time when the data is being converted and the new system is being brought up to operational status.

## **6. Project plan**

The project plan lists all tasks and dependencies as well as those people responsible. It assigns completion dates to tasks and identifies the critical path. It should be reviewed and updated weekly by the project manager.

## **7. Project meetings**

The project team should plan to meet weekly or at a time appropriate to the nature of the project.

The minimum attendees should be:

- The project manager
- The application manager
- The K1CORP consultant
- A representative from IT

The project plan will be updated and all members of the original kick-off meeting will be advised of any changes or additions to the project.

## **Sequence**

The normal sequence of events as follows:

### **Kick off meeting**

Determining tasks, responsibilities, dependencies and time frames.

### **Pre-implementation consultancy**

A survey of data, practices and procedures. Identify problems and gather statistics. Usually involves the interviewing of key managers and staff.

### **Project meeting**

The K1CORP consultant presents a report, conclusions and recommendations from the pre-implementation consultancy. The project team reviews this report and makes decisions on 'what, when and how'.

### **Training of core staff**

The core members of the customer's team, especially the application manager and a representative from IT, are trained to the administrator level in the K1CORP application(s). This is a prerequisite to the next phase, Implementation Consultancy.

### **Implementation consultancy**

Using the information gathered in the pre-implementation consultancy the K1CORP consultant works with the project team to decide on the most appropriate way to configure the K1CORP products chosen.

### **Project Meeting**

The project team reviews the conclusions and recommendations of the implementation consultancy and makes the final decisions on how to configure and utilize the various K1CORP products chosen. The project team will also decide which other staff members need to be trained and what training they require.

### **Training of other staff**

Other staff are notified and scheduled for application training.

### **Conversion Consultancy (if required)**

The K1CORP consultant takes the information gathered in the pre-implementation consultancy and conducts a thorough investigation of all data to be converted. He/she produces a detailed report plus conclusions and recommendations for review by the project team.

### **Project meeting**

The project team reviews the conversions report and decides on a final approach. The best and most appropriate method of capturing and converting data is decided.

### **Data conversion**

If required, Xchange configurations are designed, run and tested with representative test data. This may involve several iterative steps as the final specification is matched against real-life data.

### **Project meeting**

The project team meets to review the converted test data. Any anomalies or changes are reported back to the conversion team. This will be an iterative process as the Xchange configuration is tested against real life data.

### **Run 'dry' conversion**

A conversion is run with a complete set of the current 'live' data.

### **Project meeting**

The project team reviews the results of the 'dry' conversion and makes appropriate recommendations (i.e., alter and do again or approve for the next step). The project team agrees on a plan for the final conversion of live data and the cutover from the old system to the new system.

### **Run live conversion**

The live conversion is run as agreed.

### **Go live or parallel running (depending upon the needs of the project)**

The project either cuts over to the new system or runs in parallel for a period of time.

### **Project meeting**

The cutover is reviewed and any issues identified and addressed. A date for the post-implementation review is agreed.

### **Other staff training as required**

Other staff are scheduled for new or on-going training as required.

### **Post implementation consultancy**

At an agreed date in the future, the K1CORP consultant compares the actual situation against the project objects agreed in the original kick-off meeting. A report of conclusions and recommendations is prepared.

### **Project meeting**

The post-implementation report is reviewed and recommendations made and implemented.