



RecFind 5 to RecFind 6 Upgrade

Key Steps for Every Customer

Task	Description	Responsibility?	Est. Man-days
1	Provide detailed proposal to customer, including prerequisites	K1Corp	3
2	Order RecFind 6 software and services	Customer	1 to 2
3	Prepare RecFind 6 server environment, hardware and operating system and SQL Server. Order servers, system software etc.	Customer	5
4	Ship RecFind 6 software to customer	K1Corp	1
5	Install RecFind 6 server software, both production and test sites on new RecFind 6 server(s)	K1Corp or Customer	1 to 2
6	Install RecFind 6 client software *Actual days depend on number of users.	K1Corp or Customer	1 to 2
7	Test RecFind 6 server and client software	K1Corp or Customer	2
8	Run trial RecFind 5 to RecFind 6 conversion to RecFind 6 test system *Actual days depend upon size of RecFind 5 system and network and server resources applied.	K1Corp or Customer	2
9	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	K1Corp & key Customer staff	3 to 5

	would you like to make to the Data Model or your business processes? What data would you like to 'clean-up'?		
10	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
11	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
12	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.	K1Corp & Customer core staff	3 to 4
13	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.	K1Corp & Customer core staff	3 to 5
14	Approve and sign off RecFind 6 test system and configuration changes.	Customer	2
15	Schedule end-user training (has to happen just prior to cutover).	K1Corp & Customer core staff	1
16	Schedule live conversion (can only happen after end-users have been trained).	K1Corp & Customer core staff	1
17	Train end users *Actual days depends on the number of staff to be trained	K1Corp & Customer end-user staff	2 to 3
18	Run live RecFind 5 to RecFind 6 conversion to production system. *Actual days depend upon size of RecFind 5 system and network and server resources applied.	K1Corp or Customer	2
19	Transfer RecFind 6 test system configuration changes (from earlier trial conversion) to production system using K1Corp special tool.	K1Corp or Customer	1 to 2
20	Approve and sign off RecFind 6 production system	Customer	2

21	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
22	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 test 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 5 to RecFind 6 trial conversions.
3. 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.
4. 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.
5. 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 then the number of steps for the customer reduces and the process becomes easier.



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