SYSPRO™
Simplifying your Success

IDEAL

Implementation Methodology

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I·D·E·A·L™

Initiate·Design·Engineer·Actualize·Leverage

Why IDEAL?

Delivering the Right Solution to Meet Your Business Goals and Objectives

SYSPRO succeeds in implementing solutions by using best practices developed over many years of experience. A successful ERP implementation is the foundation on which companies expand their businesses, launch new initiatives and improve existing operations to grow revenue and reduce costs. IDEAL, our implementation methodology, facilitates a successful implementation and a roadmap for reaping a return on investment on the project for many years to come.

IDEAL is a scalable, structured and phased approach consisting of pre-defined inputs, activities and outputs which deliver a solution that meets your objectives. The methodology is designed to deliver a project that:

- Delivers the right solution that best meets your requirements
- Uses our experience and knowledge of best practices to your benefit
- Provides visibility into and accountability of our activities and services
- Uses your resources effectively
- Empowers you and your employees to know and leverage the solution for your business
- Scales to meet the complexity or simplicity of your implementation needs and your company's capabilities

Project Administration

The foundation of IDEAL lies in the project controls and governance activities that we perform throughout the Implementation. Best practices in project management ensure that the project is meeting its defined objectives and remains on track within the defined scope. It also ensures costs are kept within budget and that resources are being managed effectively.

Change Control

To capture any material changes from the agreed scope to the project timescale, scope and/or budget.

Project Management

Provides overall control and management of resources, scope, budget and timescales throughout the delivery of the project.

Quality Control

Project assurance activity to provide checks and balances around the project deliverables.

RAID

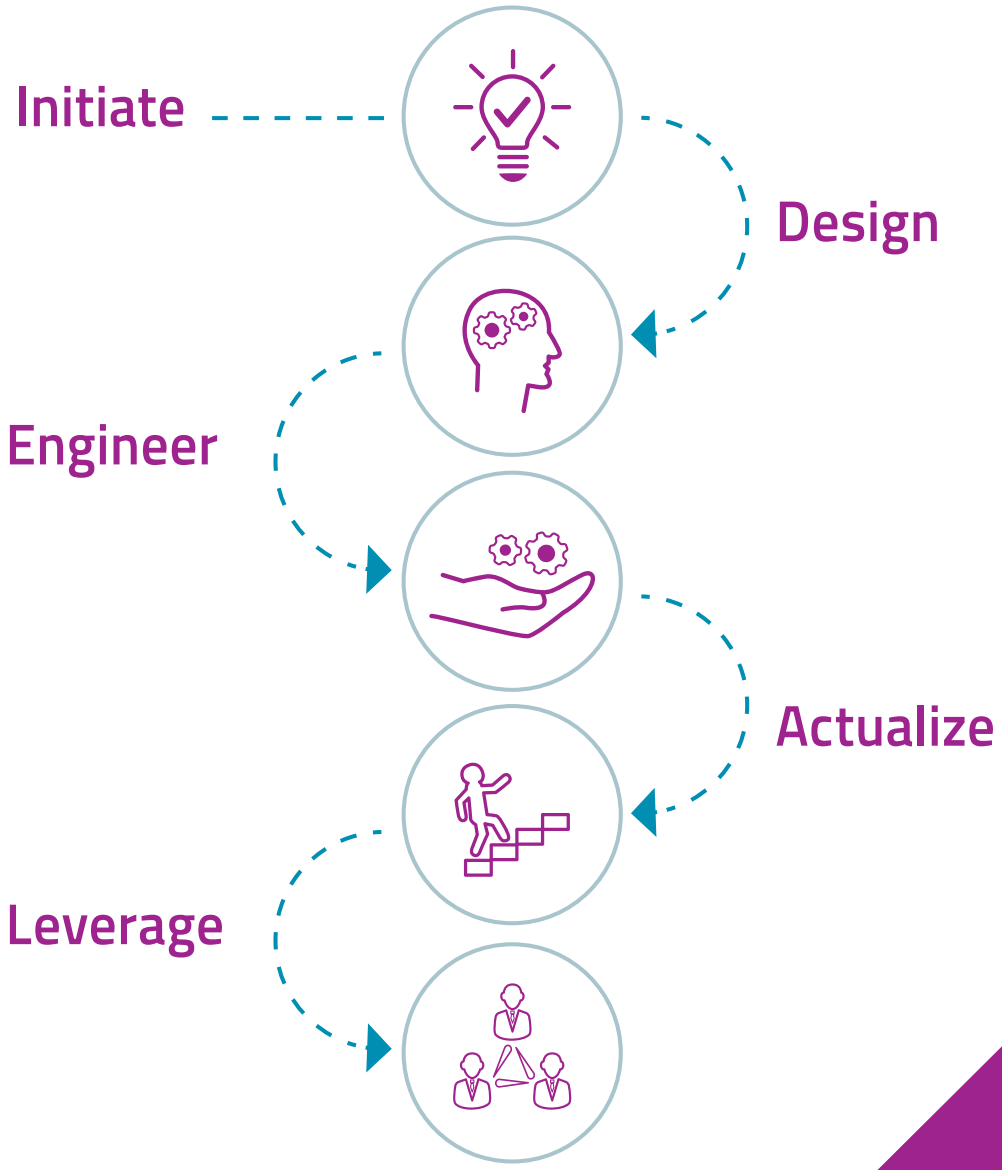
A key project control used to capture Risks, Actions, Issues and Decisions.

Stakeholder Management

Includes communication plans and definition of roles and responsibilities within the project team to help the team work together effectively.

The Five Phases of IDEAL

A successful ERP Implementation is the foundation to expand your business, launch new initiatives and improve existing operations. SYSPRO IDEAL is a scalable, structured and phased approach that has been proven and defined for over 30 years. The phases of IDEAL are highlighted below:



Initiate Phase

The implementation project begins with the Initiate Phase. In this phase, the project teams from your company and SYSPRO come together to plan out the project activities, resources and timelines. The subsequent phases of the project are built on the foundation created during this phase so it is critical that every project consists of the following:

- Handover Meeting (Internal Sales and Services delivery)
- Customer Start-up Meeting
- Resource Identification
- Scoping
- Work Breakdown Structure
- Project Planning
- Infrastructure Assessment

This phase starts with an internal handover meeting between our Sales and Services Delivery teams to ensure that all parties have an aligned understanding of the business, its requirements and the requirements of the project.

A Customer Start-up Meeting is arranged in order for your company to meet the SYSPRO project delivery team. During this meeting the project's goals and mandate are discussed, project team members from both your company and SYSPRO are confirmed, and the communication plan between your company and SYSPRO is agreed.

After the Customer Start-up Meeting, a joint activity and resource identification plan is developed to identify the work which will be required to deliver your SYSPRO solution, aligned with your business objectives.This is followed by an initial scoping of the project.

This process represents a review of the businesses' core functions and operations and confirms that the scope of the project has been appropriately defined and contained.

A Project Plan Outline is drafted and identifies the work breakdown structure of activities needed, the resources required and a draft project schedule. The project plan will be finalized after the solution Design Phase (discussed later in the document) is completed. During Initiate, a RAID register is started. This register will track project Risks, Actions, Issues and Decisions throughout the life of the project. Also performed during the Initiate phase is an infrastructure assessment. This assessment ensures that your hardware, including servers, desktops, printers, networks and connectivity, meets the requirements needed to successfully run SYSPRO.

Finally, the activities of the Initiate Phase culminate in the drafting of the Project Initiation Document (PID). The purpose of the PID is to provide the baseline and the principal governing parameters for the project. It acts as a reference point for the project team throughout the project when questions of scope, resources and risk arise. At the end of the project the Project Initiation Document (PID) also serves as a check list that all the project deliverables have been completed.

The phase is completed when the customer and SYSPRO have discussed and agreed the following:

- Project Plan Outline
- Project Initiation Document (PID)
- Risks, Actions, Issues and Decisions (RAID) Register

Design Phase

In the Design Phase, the project team explores the business objectives and needs in detail and begins architecting the solution that will best meet those needs within the project parameters:

- Business / Process Review
- Solution Specification and Modeling
- Gap Analysis and Resolution
- Education Review

During the Design Phase of the implementation, the project team will evaluate the current 'as is' business processes of your company and begin outlining the 'to be' business processes. All reporting and documentation requirements are gathered during this phase.

In this phase, the project teams begin to tailor the SYSPRO solution to the specific business needs of your business operations. Any functional gaps identified between a business requirement and SYSPRO's out-of-the-box capabilities will be outlined in the gap analysis. A plan to resolve these gaps will be documented including any functional specification documentations necessary to describe how these specific requirements will be satisfied. This may result in a decision to revise business processes, license additional software or create change requests needed to meet the requirements.

The Design Phase also represents an opportunity to determine the most effective approach to train and educate the end users to ensure they are able to make best use of SYSPRO to perform their daily activities.

The agreement and approval of the Design Phase outputs will shape the subsequent joint delivery plan for the remainder of the SYSPRO project. A completed Project Plan including all remaining activities, resources and the project schedule can be approved at this stage.

The Design outputs may include:

- Functional / Technical Requirements Document
- Solutions Design Document
- Reporting & Stationery Requirements

Engineer Phase

In the Engineer Phase, the project team starts to configure and build the solution based on the agreed design. This phase consists of the following activities:

- Hardware Infrastructure Readiness
- Sample Data Creation
- Solution Build
- Test Script Creation
- Data Migration Test
- Acceptance Testing (UAT Pilot)

The first step in the Engineer Phase is to review the hardware infrastructure to verify that the network resources have sufficient capacity and have been configured correctly to install and run the SYSPRO software and other integrated solutions. Once this is in place the project team can begin building your SYSPRO solution.

Building the solution entails consultancy to configure and build SYSPRO to align with your specific requirements within each business area. As part of this process, it is essential that representative sample data from your business is available in a test SYSPRO environment. If data migration from the legacy system is required then this will begin as well.

The Engineer Phase also includes the development of document formats, reports and any customizations defined and agreed to during the Design Phase. Using your data, business process owners configure and test live production scenarios in the solution simulation. Supported by test scripts, this process will be repeated many times to ensure that the processes are familiar and the data is suitably refined in readiness for the final data take-on activity.

The output of these activities is a prototype solution within SYSPRO which is designed to support your end-to-end business processes.

Once complete, the formal test stage begins, using test scripts created by your company to represent all business processes. This is designed to ensure that each functional component within the prototype SYSPRO model integrates as expected.

Any refinements needed at this stage as an output from the test phase are then made in readiness for the go-live cutover activity.

Formal acceptance of the prototype solution concludes the Engineer Phase of the project with the following outputs:

- Completed prototype solution
- Test scripts
- Data migration plan and templates
- Completed document formats and reports
- Completed customization

Actualize Phase

Once the prototype has been accepted as the required solution, the time has come to actualize your implementation. During the Actualize Phase the following activities are undertaken:

- End-User Training
- Readiness Testing (End-User UAT)
- Production Master Data Import
- Go/No-Go Review (Sign off)
- Balance Take-On
- Balancing the System
- Cutover to SYSPRO
- Go-Live Support
- First Month-End Support

It is important that all users of the solution are prepared and ready to use the new software at cutover. During Actualize, End-User Training is delivered by the project team resources from SYSPRO and/or your own internal project team. User Guides can be created specifically for your solution and are helpful to users during and after the training. Next, users perform Readiness Testing. While training takes place, the SYSPRO production company based on the prototype is built and the master data is imported.

Based on the cutover evaluation, additional training may be required and this also forms part of the Go/No-Go Review (Sign off). In preparation for cutover, users input opening sub-ledger and general ledger balances. Complete balancing of the new system values against the legacy system values is performed and accepted. The system will then be ready for cutover to the production system.

From this point forward, all transactions are performed on SYSPRO. The SYSPRO project team is also available to support your first month-end on the SYSPRO solution, to ensure that the business reporting cycles and fiscal period-end processes are in line with your requirements. This typically marks the completion of the Actualize Phase. Sometimes handholding support may also be requested during the second financial month-end.

Once the prototype has been accepted as the required solution, the time has come to bring the project to life. During this phase the following activities are undertaken:

- Signed off environment
- Signed off master data
- Signed off stationery
- Signed off reports
- Signed off take-on
- Signed off go-live
- Park lot/issues register

Leverage Phase

Once your SYSPRO solution is in place and is being used for business as usual, the Leverage Phase begins. Key to the Leverage Phase are the following activities:

- Support Documentation
- Support Handover
- Account Management Handover
- Project Close

The Implementation Consultants create support documents. Support is responsible for the ongoing management of success onsite, while Account Management manages the overall relationship. A handover meeting takes place with the project team, Support and Account Management.

Critical to the success of the project is the continuous improvement of our methodology and implementation processes. A register of lessons learnt from each implementation is shared with the SYSPRO community and project closure then occurs.

About SYSPRO

SYSPRO is a global, independent provider of industry-built ERP software designed to simplify business complexity for manufacturers and distributors. Focused on delivering optimized performance and complete business visibility, the SYSPRO solution is highly scalable, and can be deployed on-premise, in the cloud, or accessed via a mobile device. SYSPRO's strengths lie in a simplified approach to technology, expertise in a range of industries, and a commitment to future-proofing customer and partner success.

SYSPRO has more than 15,000 licensed companies in over 60 countries across six continents.

SYSPRO provides a unique combination of robust, scalable solutions that ensure minimal risk and a high return on investment.

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