

# IDEAL

## Implementation Methodology



**SYSPRO**<sup>™</sup>  
Say Yes to Next

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I·D·E·A·L™

Initiate • Design • Engineer • Actualize • Leverage



# Introducing SYSPRO IDEAL Implementation Methodology

## Delivering the Right Solution to Meet Your Business Goals and Objectives

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. Our IDEAL implementation methodology uses best practices developed over many years of experience and facilitates a successful implementation and a roadmap to 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.

## **Project Management:**

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

## **Stakeholder Management:**

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

## **Change Control:**

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

## **Quality Control:**

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

## **RAID Register:**

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



# The Five Phases of IDEAL

IDEAL consists of five clearly defined phases:



\* This activity is applicable to on-premise implementations only.



# Initiate Phase

The implementation project begins with the Initiate phase. In this phase, the project teams from your organization and SYSPRO come together to plan the project activities, resources and timelines. The subsequent phases of the project are built upon the foundation created during the Initiate phase, and consists of the following activities:

- **Sales Handover Meeting:** The internal Sales and Consulting Services teams meet to prepare for the start of your project, ensuring that appropriate resources are selected to deliver your specific requirements.
  - **Customer Start-up Meeting:** Is arranged in order for your key stakeholders to meet the SYSPRO Consulting Services team. During this meeting the project's goals and mandate are discussed, project team members from both your business and SYSPRO are confirmed, and the communication plan between your company and SYSPRO is agreed.
  - **Resource Identification:** The newly formed joint project team work to confirm the resources which will be utilized throughout the project, including project management, process leads and project sponsorship and governance, designed to ensure a successful outcome.
  - **Initial Scoping:** Is focused upon deriving a detailed understanding of the functional requirements for your SYSPRO ERP implementation, in order to achieve your businesses strategic goals for the project.
  - **Project Planning:** This is a component of the planning phase, reflecting the activities required to successfully realize your ERP project's intended outcomes.
  - **Infrastructure Profile:** \*Where applicable, ensuring that your hardware and communications network provides a suitable platform to support your new ERP software. Our expert advisors will help guide you through any recommendations to optimize performance.
- \* This activity is applicable to on-premise implementations only.

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:

- Completed Site Infrastructure Profile
- Approved Project Initiation Document
- Project Plan Approval
- Project Controls inc. 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's parameters.

Using the agreed deliverables (outputs) from the Initiate phase, the Design phase consists of the following principal activities:

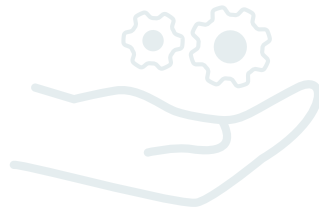
- **Business & Process Review:** The project team will evaluate your current 'as is' business processes and begin outlining the 'to be' business processes. All reporting and documentation requirements are also captured during this phase.
- **Solution Specification and Modeling:** The project teams begin to configure the SYSPRO prototype solution to the specific business needs of your business operations. Unlike many ERP implementors, SYSPRO's process adopts a consultative and iterative approach, ensuring that you have full visibility of your ERP solution as the solution modeling evolves.
- **Gap Analysis and Resolution:** 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 documentation necessary to describe how these specific requirements will be satisfied.
- **Initial Business Process Training:** To achieve the closest alignment between your business processes and SYSPRO's functional capability, business process training will provide you with hands on opportunity to experience SYSPRO's capability, look and feel. This will ensure that you are fully prepared to maximize the value from your consultancy during the Engineer phase.

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:

- Customization, Report and Stationery Register
- Training Needs Assessment
- Development Statement(s) of Work (where applicable)
- Completed Design Document
- Acceptance of Proposed Solution
- Chart of Accounts Sign-off





# Engineer Phase

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

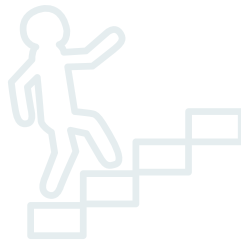
- **Installation Profile:** \*To verify that the network resources have sufficient capacity and have been configured correctly to install and run the SYSPRO software and other integrated solutions.  
\* This activity is applicable to on-premise implementations only.
- **Sample Data Creation:** Representative sample data from your business is loaded into a test SYSPRO environment to help you build familiarity with SYSPRO ERP, while work to migrate any data from legacy system(s) will commence at this stage, in parallel.
- **Prototype Build:** The consultancy is delivered in a modular structure, in-line with each functional area of your ERP requirement. At the end of each session you will be given opportunity to test each aspect of the prototype, providing feedback to your consultant, ensuring that the solution is fully aligned with your business requirements.
- **Solution Simulation & Test Script Creation:** Using your data, business process owners configure and test live production scenarios within the test SYSPRO environment. 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.
- **Data Migration Test:** Once the data cleansing (where applicable) process has been carried out, the data migration process will be tested. Your consultant will provide support and guidance, to ensure that you are comfortable with the process in time for you to go-live with your new SYSPRO ERP solution.
- **User Acceptance Testing:** Using the test scripts previously created, the formal testing process is undertaken. This is designed to ensure that each functional component within the ERP prototype operates and 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 cut-over activity.

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

- Installation Profile
- Completed Prototype and Prototype Sign-off
- Completed customization (where applicable)
- Training Attendance and Sign-off
- Test Scripts
- Masterfile Layout Spreadsheets for Import







# Actualize Phase

Once the prototype build has been accepted, the time has come to actualize the implementation. During the Actualize phase the following activities are undertaken:

- **Production Master Data Import:** While training takes place, the SYSPRO production company (based on the prototype) is built and the master data is imported.
- **End-User Training:** It is important that all users of your new ERP solution are prepared and ready to go-live. During Actualize, end-user training is delivered to the end-users either by your process leads, or SYSPRO's consultants (if required). User guides can be created specifically for your tailored solution, which provide a valuable aid to your users during and after the initial training.
- **Readiness Testing:** Performed after the training, this is a crucial step before cutting over to the new system to ensure that the system, processes and people are ready for Go-Live.
- **Go/No-Go review:** Represents a key decision point within the phase and takes input from the outcome of the readiness assessment. The decision to go-live at this stage, or to defer, to provide additional opportunity to address any findings from the assessment, is made. Your operational readiness is also duly considered, in addition to the readiness of your ERP solution.
- **Take on Balances, Balance the System and Sign-off:** Following a decision to go-live, you will input opening sub ledger and general ledger balances into SYSPRO. Balancing SYSPRO transactional values to the values within the legacy system (where applicable) is performed and accepted. Your new SYSPRO ERP solution will then be ready to use.
- **Cut-over to SYSPRO (Go-Live) and Early Life Support:** From this point forward, all transactions are performed within your new SYSPRO ERP solution, while early life support is provisioned by your consultant(s), to ensure that any early life queries are effectively managed.
- **Validation and Sign-off on first Month End Balances:** The SYSPRO project team is also available to support the management of your first month-end financial ledger within your new SYSPRO ERP. This ensures that your business reporting-cycles and fiscal period-end processes are managed in line with your requirements. Once the prototype has been accepted as the required solution, the time has come to bring the project to life.

The following outputs will conclude the Actualize phase:

- Acceptance Custom Reports
- Acceptance Stationery Formats
- Acceptance Data Validation
- User Preparedness Validation
- Acceptance Production Company
- Acceptance Go/No-Go Decision
- Acceptance Opening Balances
- Acceptance First Month End Balances





## Leverage Phase

Once your new SYSPRO ERP solution is in place and is being readily used, the Leverage phase begins where the focus shifts to evolving and improving your solution, and ensuring continued customer satisfaction. Key to the Leverage phase are the following activities:

- **Handover to Support:** Your implementation consultant(s) will produce documentation and effect a handover to the SYSPRO Support team, who will provide expert assistance to your team once the project has closed.
- **Handover to Account Manager:** As the project draws to a close, an Account Manager is made available to you. This ensures that our relationship with you, as a trusted advisor continues to evolve. Working together in this way helps us understand how best to enable your future strategic goals through the effective application of SYSPRO's capability.
- **Project Closure Meeting:** Critical to our collective success is continuous improvement. As such, any recommendations for further refinement is provided, in addition to a project closure report, including a summary of the project's key metrics and success measures.

Outputs include:

- Project Closure/Sign-off
- Plan for Continuous Improvements

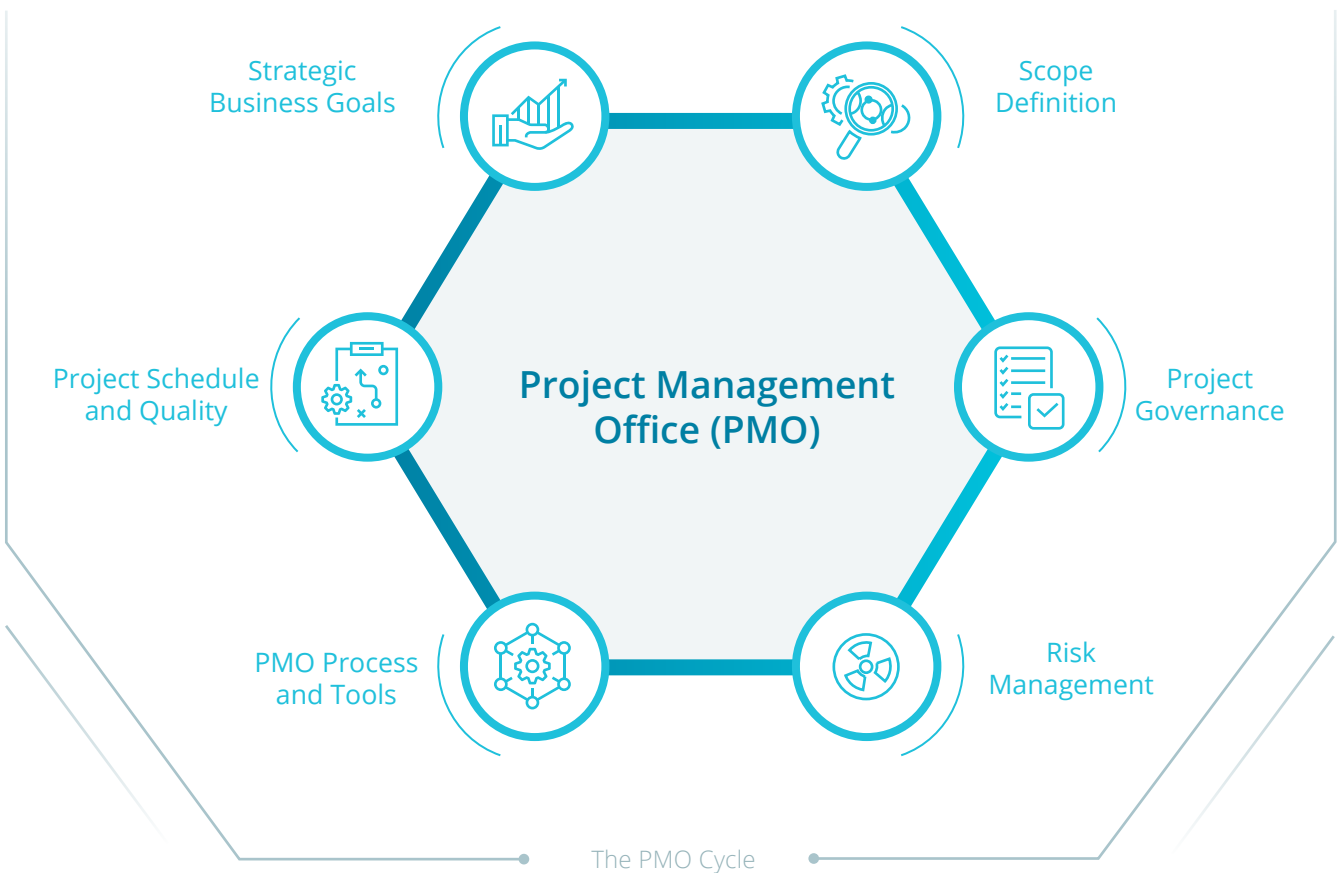


# Ensuring quality and consistency in everything we do

We understand that investing in an ERP solution can be a stressful and time consuming experience. We therefore understand the need to have confidence that your implementation partner has the experience and credentials necessary to successfully guide you through the implementation journey.

SYSPRO therefore ensures that every managed implementation adheres to strict quality standards, as defined by its Project Management Office, or 'PMO'.

The PMO ensures that every implementation is managed in a consistent manner and in-line with best practice principles. Independent assurance checkpoints are conducted to ensure that you as our customer are receiving the best quality of service, helping guarantee a successful outcome for your organization's ERP needs.



## In Conclusion

We hope that the information within this brochure answers at least some of your initial questions and helps to show how SYSPRO's expertise can help support and de-risk your ERP implementation journey.

We would like to take the opportunity to extend our warmest thanks for your consideration and we look forward to having the opportunity to work with you as your trusted ERP advisor in the near future.

If in the meantime you have any questions concerning SYSPRO's Consulting Services offering and implementation methodology, please don't hesitate to contact your SYSPRO representative.



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