



Implementation Overview

Cyber Train 1.1

November 2007

Implementation Methodology

Visibility Software uses a methodology for implementation and training which has been years in the making. Having worked with clients over the last five years installing Cyber Recruiter, we have found most companies do not have the resources to put ongoing human resources activities and projects on hold for an extended time period in order to set up a system and perform training. We have also found that most people can only absorb or assimilate about 2-3 hours of new information during a single session.

In response to these observations, we have developed a unique implementation methodology for Cyber Recruiter and Cyber Train which started with the decision to host all implementation projects on Visibility Software servers. This allows for flexibility within the project in various areas.

- First, it allows the client's IT department time to set up infrastructure prior to beginning the implementation project.
- Second, implementations can be more flexible in scheduling since a consultant does not have to be on-site to conduct training or assist with setup.
- Third, it allows for decisions to be made through the process instead of at the beginning of the project.



Taking advantage of these benefits, we have structured an implementation which works for both large and small clients, clients with one location or many, clients with one recruiter or several. The implementation will involve 2-3 hour weekly web meetings held remotely (not on client site), assignments between each meeting and sign-offs through the process to track progress and signify completion of an area. The meetings and 'training sessions' are designed for the decision makers of the system and allows the implementation group to continue on with daily responsibilities while implementing a new software solution without being overwhelmed by the implementation project.


During each weekly web meeting, the group will review any previously tasked items, address new topics and allow for a question and answer session. This standardization and breakdown of meetings by topics allows for the content to be covered gradually during the implementation to ensure understanding and allow for setting up of the options during the implementation process. If significant sections of tasks slated to be complete as client homework are not accomplished before the next session the meeting will be rescheduled, allowing the overall project to stay on track.

Project Start

Each project will start with the purchase, which includes payment and signed agreements ((1) Professional Services Agreements and (2) Statement of Work for the project). Payment for services and the sign-off of the agreements triggers our Professional Services team to contact the Project Contact to schedule the first call for the implementation team – the Meet & Greet call.

* Times noted are estimates for meeting times only and do not include time for “homework”, project management, or configuration of the system.

	<p>Week 1: Web Meeting/Conference Call (M1) Meet & Greet (60 Minutes)</p>
	<p>This will be the first meeting of the implementation team. This meeting is designed to get to know each other, set realistic expectations, review the implementation process, assess any technical concerns, and set up the project timeline.</p> <p>Items Needed:</p> <ul style="list-style-type: none"> ▪ Technology Overview – IT Contact should read the requirements ▪ Sign Off Review – HR Contact should review this document ▪ Implementation Overview – HR & IT Contacts should review this document ▪ Calendars/Schedules – To set up the rest of the meetings for this project <p>Items to be Discussed:</p> <ul style="list-style-type: none"> ▪ Technical Concerns ▪ Implementation Process/Expectations ▪ Sign Offs ▪ Project Timeline
	<p>Client Homework</p>
	<p>Client should review the process & needed spreadsheet and have internal discussions on the features of Cyber Train and which features should be activated during the implementation process.</p> <ul style="list-style-type: none"> ○ Review & sign Project Agreement Sign-Off
	<p>Week 2: Web Meeting/Conference Call (M2) Procedure & Current Process (2 Hours*)</p>
	<p>This session thoroughly reviews the organization’s current training management process and what the client hopes to gain by implementing Cyber Train. This will include how the organization creates new classes and manages the open classes, enrolls students, and any specific reporting needs. The database conversion piece will also be discussed to determine data sources, if applicable. After the meeting, the Visibility Software Project Manager will provide the client with a Priority List for the project to help guide the group through the remaining meetings.</p> <p>Items Needed:</p> <ul style="list-style-type: none"> ▪ Project Agreement Signoff – First Sign Off <p>Items to be Discussed:</p> <ul style="list-style-type: none"> ▪ Procedure & Current Processes ▪ Database Conversion

	<p>Client Homework</p>
	<p>Review current systems and processes to determine which pieces of information will be converted over to Cyber Train during the implementation (employee records, users, and/or class information). The Visibility Software will assist in bringing in basic employee and class information using the tools in the product. This can be done at any point during the implementation project but it is recommended at the end of the project to reduce the amount of duplicate entry between two systems. Advanced data conversions will include a separate statement of work and project plan.</p> <ul style="list-style-type: none"> ○ Task items designated on Current Task List ○ Review & sign Database Conversion Sign-Off
	<p>Week 3: Web Meeting/Conference Call (M3) Admin Setup (2 Hours*)</p>
	<p>The implementation project will start with a base system which can be configured as the client desires. This first session focuses solely on the administrative sections of Cyber Tain and discusses the basic setup of the system which makes one client's system different than another client.</p> <p>Items to be Discussed:</p> <ul style="list-style-type: none"> ▪ System setup ▪ Creating Drop-down options – “Codes” ▪ Security Setup <p>Suggested Considerations:</p> <ul style="list-style-type: none"> ▪ Role of various users in the system (admin / instructor / manager / student) ▪ Documents used in general for training ▪ Training requirements ▪ Consistent information about training classes
	<p>Client Homework</p>
	<p>Review current systems to determine if information for setup can be ‘pulled’ to populate the codes and users for Cyber Train. Various other task items will be assigned for the Client to take further action with (Workbook exercises, modifications to areas shown, etc.). It is important to think about how to incorporate these task items and the new information learned into the week prior to the next meeting. Considerations – time constraints, resources, styles of learning, etc.</p> <ul style="list-style-type: none"> ○ Review and approval Priority List items ○ Task items designated on Current Task List ○ Review & sign Process & Needs Sign-Off



Week 4: Web Meeting/Conference Call (M4) Admin Views (2 Hours*)

This session is a review of the various screens available to the Administrative and/or other users in the system. Depending on user security, access to these pages will change.

Items Needed:

- Completed Items from Admin Setup To-Do List

Items to be Discussed:

- Screens for Students
- Adding Students
- Screens for Classes
- Adding Classes

Client Homework

At this point, a majority of the administration section has been explained. Though it might be tough to conceptualize how it is all going to come together is the next step. Populate the information as much as possible. Contact the Consultant for assistance on confusing areas as needed. It is important at this point to get in there and start familiarizing yourself with where to find the information on the Admin section of the system.

- Review and approval Priority List items
- Review & sign Admin Setup Sign-Off
- Task items designated on Current Task List



Week 5: Web Meeting/Conference Call (M5) Other Views (2 Hours*)

This session focuses the view other users will see inside the system.

Items Needed:

- Completed Items from Admin Views To-Do List

Suggested Considerations:

- Role other people play in the training process



Items to be Discussed:



- Setup
 - Students / Managers / Instructors
- Accessing Student Pages
- Student Actions / Views

Client Homework

Consider the information learned and decide which views and options should be available for the different users of the system. Use the tools provided to help increase understanding as well as add/modify configurations, security, and processes to fine tune the processes.

- Review and approval Priority List items
- Task items designated on Current Task List
- Review & sign Admin Views Sign-Off

	<p>Week 6: Web Meeting/Conference Call (M6) Reports (2 Hours*)</p>
	<p>This session focuses on the Report Writer available in Cyber Train.</p> <p>Items Needed:</p> <ul style="list-style-type: none"> ▪ Completed Items from Other Views To-Do List <p>Suggested Considerations:</p> <ul style="list-style-type: none"> ▪ What information needs to be reported on from the system <p>Items to be Discussed:</p> <ul style="list-style-type: none"> ▪ Understanding the data structure ▪ Overview of the Report Writer ▪ Customizing Standard Report ▪ Creating Custom Reports
	<p>Week 7: Client Homework Homework and Testing</p>
	<p>After the final training session, two weeks are provided for the client to immerse themselves in the product to test, play and explore.</p> <p>During this time:</p> <ul style="list-style-type: none"> ▪ Cyber Train should be installed on your server by this point ▪ Review the final To-do list to determine what is outstanding ▪ Finish adding courses, programs, certifications, students, and classes to the system ▪ Test the setup configurations ▪ Generate and ask questions to ensure that the process is completely understood ▪ Send in outstanding Sign Offs
	<p>Week 8: Web Meeting/Conference Call (M7) Wrap Up Meeting Call (2 Hours*)</p>
	<p>This session is the final implementation meeting. It is designed to review the process one final time and to act as a question and answer session. The goal is to resolve any questions that may have come up during the user testing and to prepare for the data conversion and data transfer.</p> <p>Items Needed:</p> <ul style="list-style-type: none"> ▪ List of questions ▪ Completed Items from Reports To-Do List <p>Items to be Discussed:</p> <ul style="list-style-type: none"> ▪ Outstanding Questions ▪ Overall Review ▪ Database Conversion ▪ What are the next steps? <p>Items after Meeting:</p> <ul style="list-style-type: none"> ▪ Training Signoff ▪ Data for Conversion (if applicable)

	<p>Week 8: Web Meeting/Conference Call Transfer of Data</p>
	<p>After the system is approved and all sign-offs are completed, a representative from Visibility Software’s development team will work with the Client’s IT Contact to transfer the web pages and the SQL database from the Visibility Software server to the client site.</p>
	<p>Week 8: Web Meeting/Conference Call (M8) Connectivity Meeting (30-60 mins*)</p>
	<p>After the transfer is completed, ideally later that day, the HR Team and the Visibility Software Project Manager will do some high level testing.</p> <p>Items to be Reviewed:</p> <ul style="list-style-type: none"> ▪ Changing necessary links in Admin ▪ Send test email ▪ Enter student ▪ Open Class <p>The Client determines the definition of going “live”, whether that is allowing manager and employee access or using the tool internally. Ultimately, the Client has the final say on how the product is used from this point forward. Once the initial testing is completed, Visibility Software will send the System Acceptance Sign-Off – this signifies the implementation project is complete and Visibility Software will act in a technical support role from this point forward.</p>