

Avail Implementation Guidelines

This guide outlines what is required from the client's perspective to successfully implement Avail in a typical operational scenario. These needs include a defined implementation scope, identified prerequisites, assigned roles from key personnel, and a broad understanding of the necessary time commitments from those roles across the entire implementation process.

Areté defines a typical installation scenario as a single plant system, producing 100-150 products, supplying four to eight warehouse locations. This system would support standard Areté API feeds for inventories, forecasts and production and is supported in a LAN environment by personnel who are versed in the basics of supply chain management. Additions to this scenario, i.e. multi-plant systems, custom API work, etc. greatly affect the complexity of a potential installation and need to be thoroughly considered when defining the scope of the implementation.

Scope

The first consideration when planning an Avail implementation is the definition of its scope. The implementation Sponsor (see Roles) should address the following questions when determining the project scope.

Which Avail functional modules (*Production Scheduling, Materials Scheduling, Deployment Scheduling, Order Scheduling, Syrup Scheduling, Inventory Control and Safeguard Inventory Policy*) are to be implemented?

How many software installation locations will be required?

How many different planned locations within the Avail installation? (*Number of required licenses*)

What technical platform will be used to best meet business requirements? (*Standalone, file servers, application servers*)

What are the required interfaces with other systems? (*Custom and Standard API*)

What is the estimated number of Avail users?

As stated above, the answers to these questions will generally determine the required resources, timeline and cost of the implementation project.

Required Roles

There are five roles or functions involved in an Avail implementation. Each role has responsibilities outlined in the Resource Estimate section.

Organizational Sponsor	The Sponsor is the client's project champion; responsible for ensuring clarity of project objectives, availability of proper resources, clearing any roadblocks and maintaining project visibility with senior management.
Operational Process Owner	The Process Owner is responsible for the overall implementation and ultimately for the accuracy of the system. His or her job is to assess the current situation, assign roles, expedite steps, coordinate training, etc.
Avail Coordinator	The Coordinator is responsible for populating Avail database during Pework, to complete many of the tasks required for implementation and to manage and administer application once it is running Live.
IT Process Owner	The IT Process Owner is responsible for creating the required API parcels, installing and supporting the required hardware/software and involving the proper IT personnel. They must also ensure that remote support is reliable and appropriate data recovery procedures are in place.
Areté Inc	Areté supports the entire implementation process and trains all users.

Prerequisites

From the project scope a number of implementation prerequisites are identified. These prerequisites must be in place within your organization prior to the actual implementation work conducted on-site by the Areté Implementation Team.

Scope Agreement	All stakeholders must agree to the scope of the implementation project.
Organizational Commitment	The Sponsor must ensure alignment within their organization to the implementation project.
Defined Planning Process	Upper management must have vision of the current and future planning processes from sales forecasting through operational scheduling. That is, there must be significant thought given to process analysis - how does forecast and inventory data move into Avail, how does the production and deployment schedules from Avail move to the production floor, etc. In short, this process helps answer the question: Do the various functions within the company understand their roles and how they must support this process?
Identified Resources	The following must be identified prior to implementation:
People	The Sponsor must assign staff members to the implementation roles and budget the necessary people-days, according to the guidelines set in the Resource Estimate section.
Systems	During on-site implementation, Areté consultants need dedicated office space with access to phones and proper network connections. Additionally, both meeting and training areas are required to facilitate those activities as needed.
Workspace	Areté requires a current copy of the working data from your existing system to ensure the availability of timely and correct inventories (whether physical or perpetualized counts), forecasts, and daily statuses of all shipments.
Data	Remote Support software, such as pcANYWHERE, must be purchased and installed on a networked workstation. Areté requires this software to provide remote support to our clients, as per our Standard Maintenance Agreement.
Remote Support Connection	Remote Support software, such as pcANYWHERE, must be purchased and installed on a networked workstation. Areté requires this software to provide remote support to our clients, as per our Standard Maintenance Agreement.

Phases

The entire Avail installation process begins with a **Pre-Implementation** phase, where client-specific objectives are determined and the business negotiations (estimates, contracts, etc.) take place. From there the process moves into the next phase, **Implementation** (described below), once the software goes Live, the process moves into the final phase, **Post-Implementation**, for acceptance. After acceptance the client moves to maintenance for support.

Within the **Implementation** phase, there are three phases:

- 1. Prepare** Define, create and inspect API parcels; define inter-location connectivity and develop an implementation plan.
- 2. Prework** Install hardware and software, Prework training, load master data, test API routines.
- 3. Start-Up** Complete user training and the Fully Integrated Test, enter initial working data, run Avail in parallel with legacy systems, and complete system acceptance.

To simplify the initial installation process, Avail may be installed in phases. Functionality may be phased in over time, for instance, first Production Scheduling, Deployment Scheduling and FG Order Scheduling, followed by Materials Scheduling and then Inventory Control and Safeguard Inventory Policy. Similarly with API integration, manual feeds may be temporarily used while automated feeds are developed and tested. If Avail is to be used across an enterprise, it may be phased in across the manufacturing facilities first, then across the distribution centers afterwards.

How to phase in an implementation, and to what extent, are the key questions to be addressed by the Implementation Plan. To appropriately answer these questions, we need to consider the scope of change from existing scheduling and inventory

procedures, the sophistication of the user group, the complexity of the API interface, and the availability of IT, Operations and Areté resources.

Many installations will not require any custom work, but it is important to layout procedures as to how it will be requested, specified, tested and accepted if it is required. The implementation process should allow for only a minimum amount of custom reports, custom functionality and custom API changes. Whether the amount of custom work is very small in scope or quite large, it is suggested that the majority of custom work should be set aside until after Start-Up.

For a standard installation, you can expect a rather short timeline (5 to 15 weeks). For custom installations, the implementation horizon will vary, perhaps lasting as long as 25 weeks. Once again, the timeline is ultimately dependent not only on the amount of work to be done, but also on the availability of resources. This all needs to be considered while developing the Implementation Plan.

Resource Estimate

This resource estimate is based on the Areté-defined typical installation scenario: a single plant system, producing 100-150 products, with four to eight warehouse locations. This system supports standard API feeds that require little custom work and is run in a LAN environment.

Please note that the time estimates in the following table for all client roles (Sponsor, Process Owner, Coordinator and IT) are **NOT** considered to be full, eight-hour days. Rather, these estimates are calculated as six-hour days to account for daily job functions that cannot be suspended during implementation. Also, the day calculations for Areté include both on-site **AND** off-site days.

Time/ Tasks	Sponsor	Process Owner	Coordinator	IT	Areté Inc
Stage One: Prepare (1 to 3 weeks)					
Time	1 day	3 days	3 days	2-6 days	3-5 days
Tasks	Ensure: Planning processes in place Resource availability Funding availability Sr. Mgt. visibility Roadblocks cleared	Complete Functional Questionnaire Complete Technical Questionnaire Organize team Develop Project Plan with Areté	Complete Functional Questionnaire	Complete Technical Questionnaire Define Inter-Location Connectivity Plan Specify API Formats Create Initial API parcels	Specify Hardware / Software Requirements Specify API Formats Develop Project Plan with Process Owner
Stage Two: Pework (2 to 7 weeks)					
Time	1/2 day	3 days	4-7 days	3-5 days	5-7 days
Tasks	Ensure: Roadblocks cleared Resource availability Sr. Mgt. visibility	Manage project Pework seminar (optional) Communicate with users	Enter Master Tables & configuration settings Pework Seminar	Install Software Perform Network Test Validate APIs Establish Inter-Location Connectivity	Install Software Perform Network Test Validate APIs Establish Inter-Location Connectivity Pework Seminar
Stage Three: Start-Up (2 to 5 weeks)					
Time	1/2 day	4 days	8-12 days	2-3 days	7-10 days
Tasks	Ensure: Resource availability Sr. Mgt. visibility Roadblocks cleared Acceptance	Start-Up System Operational Seminar Identify & resolve issues Acceptance	Start-Up System Operational Seminar System testing Acceptance	Start-Up System Technical Seminar Acceptance	Start-Up System Advanced Operational Seminar Technical Seminar Acceptance
Total	2 days	10 days	15-22 days	7-14 days	15-22 days