Installing CCR Software

D. Borhani, S. March, K. Power
It’s Really a Very Simple Installation

- Most CCR software is off the shelf
- “It’s easy”
- Requires much more than just installing the software
- Lessons learned from two distinct installations
Why Isn’t It So Easy

- Installation versus implementation
- Purchase of a product with minimal services included
- Burden on Registry staff to implement
- No one does it exactly the way you do it
Lesson 1 – Know Your Requirements

- Re-engineering is the key
  - Gain intimate knowledge of CCR processes
  - Understand benefits, risks, roles of stakeholders
  - Identify what is important to the CCR
  - Know where procedural change is required

- Define detailed requirements based on re-engineered processes

- Use the requirements to select the vendor
Example of Using Requirements to Evaluate Software

Processes by Vendor

Vendor 1: 9
Vendor 2: 11
Vendor 3: 12
Example of Using Requirements to Evaluate Software

Process Evaluation Comparison

- Custom Design & Development
- Cannot Meet Requirement
- Planned for Future Release
- Modification Required
- Supported Differently
- Standard Function

Vendor 1
- Custom Design & Development: 54.05%
- Planned for Future Release: 6.93%
- Modification Required: 30.89%

Vendor 2
- Custom Design & Development: 61.99%
- Planned for Future Release: 28.09%
- Modification Required: 6.78%

Vendor 3
- Custom Design & Development: 4.91%
- Planned for Future Release: 63.52%
- Modification Required: 0.95%
Lesson 2 - Conduct a Gap Analysis

- **Critical** to conduct gap analysis of software against requirements after purchase and prior to installation to identify where:
  - Software behaves differently than anticipated
  - Process/procedures may need to be different
  - Modifications are required prior to installation
Lesson 3 - Data Conversion

- Critical to understand how data is and will be stored prior to evaluating success of conversion
- Don’t just use reports to review data
- Be trained on new system prior to data conversion
- Be persistent at eliminating errors prior to going “live”
Lesson 4 – Training

- Insist on a training database and a consistent training experience for each student
- Receive training earlier rather than later
- Train on the version that you will ultimately use
- Support training with complete documentation
Lesson 5 - Project Planning

- Have a business Project Manager to represent CCR to:
  - Ensure holistic approach to project
  - Maintain original intent of re-engineering effort
  - Determine Registry needs to be ready to cut over to the new software
  - Interleave operational activities with project activities
  - Prepare the environment
  - Ensure participation of stakeholders
Lesson 6 – All the Rest

More lessons that can fit in the time we have today. Some additional thoughts include:

- Clear understanding of scope of work
- Mutual expectation of deliverable content
- Implementation timed with peak registry activities

Feel free to call