

IFS IMPLEMENTATION

METHODOLOGY

IFS WHITE PAPER





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OUR METHODOLOGY

IFS IMPLEMENTATION METHODOLOGY CONSISTS OF FIVE PHASES. EACH PHASE HAS A STATED PURPOSE, KEY MILESTONES AND DELIVERABLES TO ENSURE THAT THE PROJECT TEAM IS FOCUSED ON THE RIGHT TASKS AT THE APPROPRIATE TIME

IFS Implementation Methodology™ is structured to help our customers implement IFS software to achieve their goals in a timely and cost-effective manner.

The upfront planning proposed by IFS aligns the implementation plan with the goals, scope, staffing and budget needed to succeed. Key elements to achieving an on time and on budget implementation include establishing the project structure and governance, creating a communication plan to monitor progress, tracking issues and assessing risks.

IFS Implementation Methodology consists of five phases. Each phase has a stated purpose, key milestones and deliverables to ensure that the project team is focused on the right tasks at the appropriate time.

A key success factor in all our implementations are the people assigned to the project. It is important that the project team is given the appropriate time and support to be successful and that all team members understand their roles and responsibilities.

IFS IMPLEMENTATION METHODOLOGY

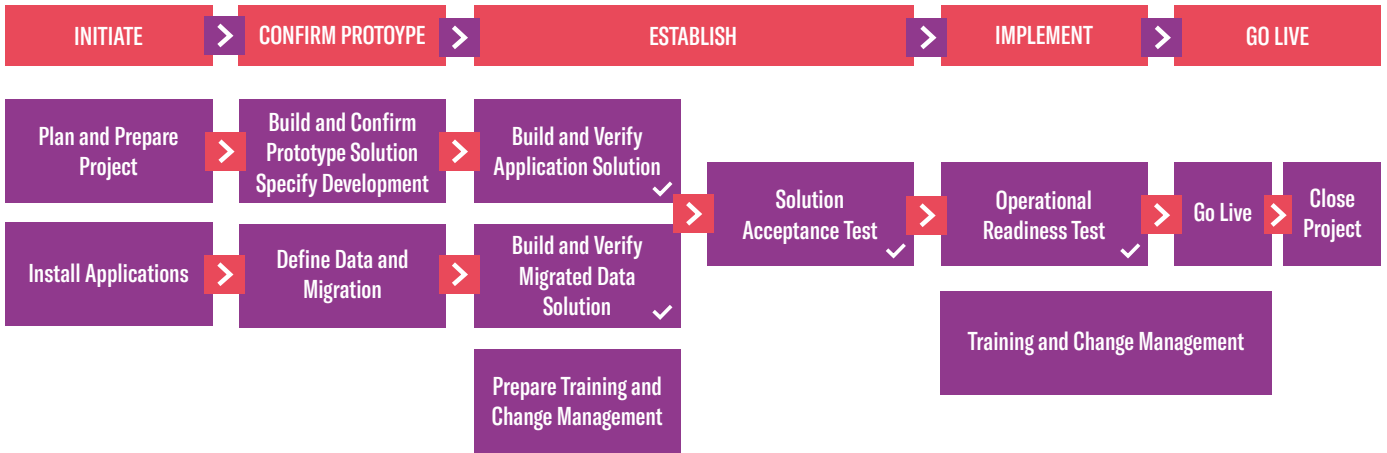
IFS Implementation Methodology is based on many years of experience successfully implementing IFS software for a wide range of IFS customers from single-site operations to multi-site, multi-country companies with many divisions. Having our IFS employees globally utilize the same IFS Implementation Methodology has been key to deploying the defined customer solution around the world.

IFS Implementation Methodology is supported by five main phases. These include the following:

- Initiate Project Phase
- Confirm Prototype Phase
- Establish Solution Phase
- Implement Solution Phase
- Go Live Phase

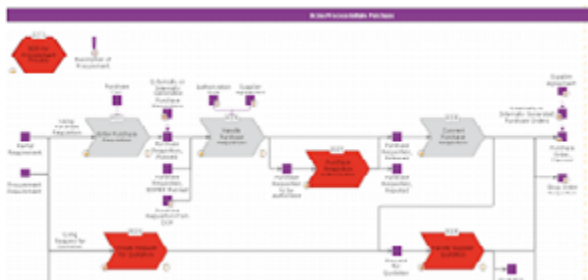
ONE GLOBAL PRACTICE

HAVING OUR IFS EMPLOYEES GLOBALLY UTILIZE THE SAME IFS IMPLEMENTATION METHODOLOGY HAS BEEN KEY TO DEPLOYING THE DEFINED CUSTOMER SOLUTION AROUND THE WORLD



PROJECT MANAGEMENT AND STEERING

IFS Implementation Methodology phases are depicted above.

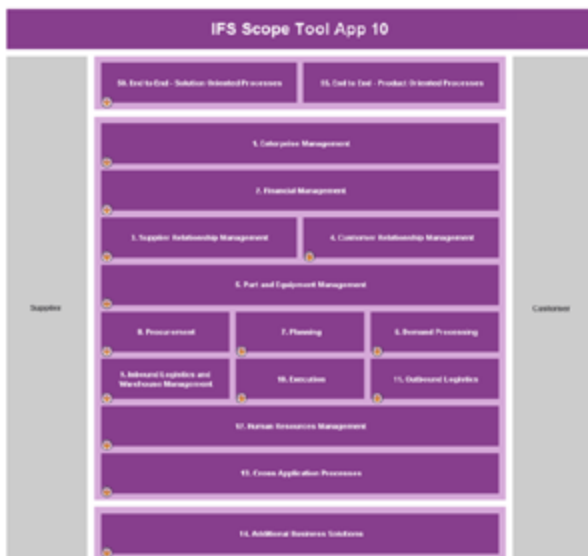


DELIVERY OF CUSTOMER-SPECIFIC SOLUTIONS

IFS implementation delivers IFS Applications based on prepackaged processes put together to describe and document a customer-specific solution.

The documented customer-specific solution creates a good understanding between both parties of what is included in the scope and how the solution works. This understanding is achieved very early in the process and creates a solid base for a clear and efficient project delivery. Customer focus and effort will shift from solution design to verifying the solution built and delivered by IFS.

The total effort, lead time and risk will be reduced.



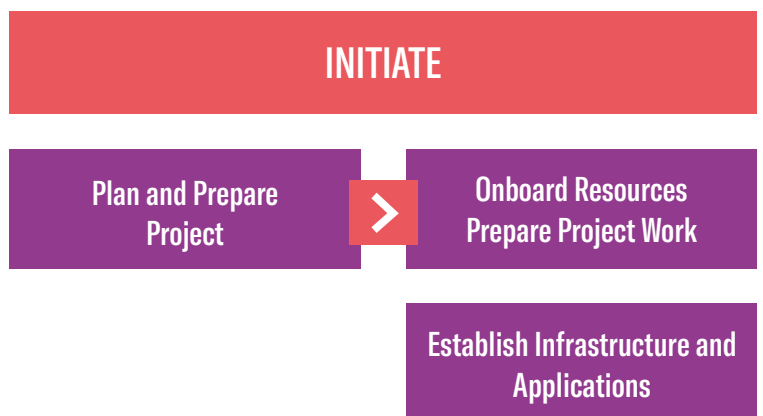
IFS SCOPE TOOL™—BASE FOR THE SOLUTION WORK

The solution is packaged based on IFS Scope Tool. IFS Scope Tool is a library with a complete set of pre-packaged processes describing how to run IFS Applications. The processes are structured from top-level solution areas down to sub-processes with predefined scenarios, defining alternate ways to run IFS Applications.



PHASE 1: INITIATE PROJECT PHASE

The Initiate Project Phase aims to achieve a seamless transfer from the sales process and to create a sound foundation for a successful project. In most cases, the foundation for the project will be built around the customer-specific solution generated from IFS Scope Tool.



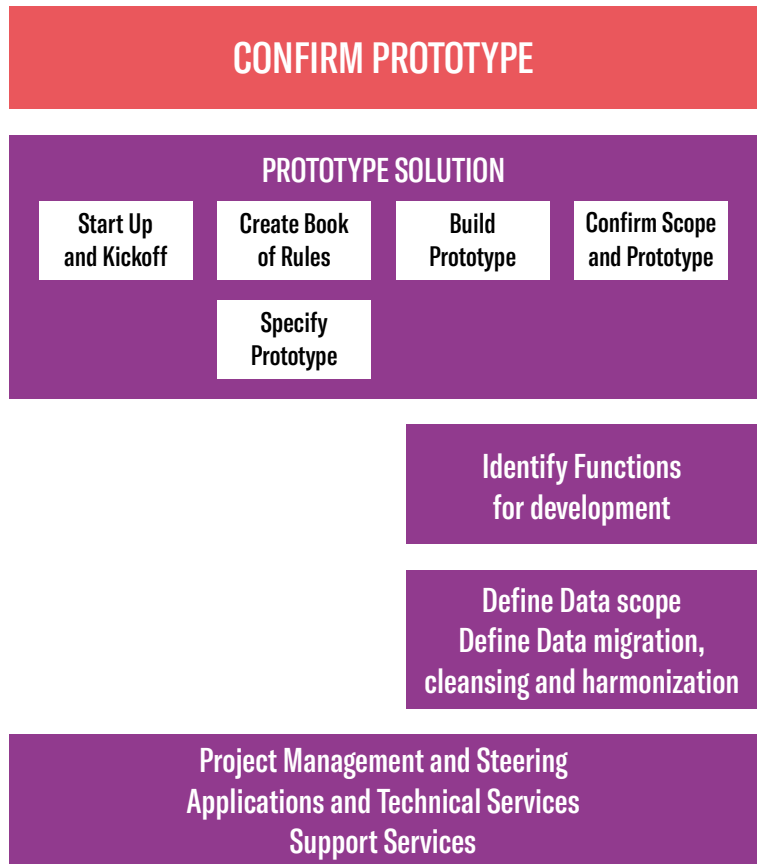
During this phase, the project management plan is updated and relevant subsidiary plans are established. Additionally, the technical infrastructure is established and the solution installed. Documentation from the Initiate Project Phase becomes the baseline against which actual progress can be measured and reported.

SCOPE AND BUSINESS PROCESSES

BASED ON THE PROTOTYPE, THE PROJECT CONFIRMS THAT THE SOLUTION SCOPE AND SPECIFICATIONS MEET THE AGREED REQUIREMENTS

PHASE 2: CONFIRM PROTOTYPE PHASE

The Confirm Prototype Phase confirms the scope and key business processes of the solution. During the Confirm Prototype Phase a first prototype of the solution is built and presented. Based on the prototype, the project confirms that the solution scope and specifications meet the agreed requirements and that the prototype solution will be the basis for the full IFS solution delivered in Establish Solution.



What is a Prototype?

- A prototype in the IFS Implementation Methodology means an early release of the solution built to enable confirmation of the solution scope and used to evaluate the solution design. Furthermore, the prototype serves to provide specifications for the configuration of the live system in the Establish phase as well as providing a basis for creating specifications for CRIM objects (Configurations, Reports, Interfaces and Modifications) included in the scope.
- The prototype is not a complete system definition including all variances of scenarios and processes but illustrates the main end-to-end processes and optionally few processes earlier identified as highly critical to the customer business.



Confirm Prototype key activities

Key activities during the Confirm Prototype Phase include:

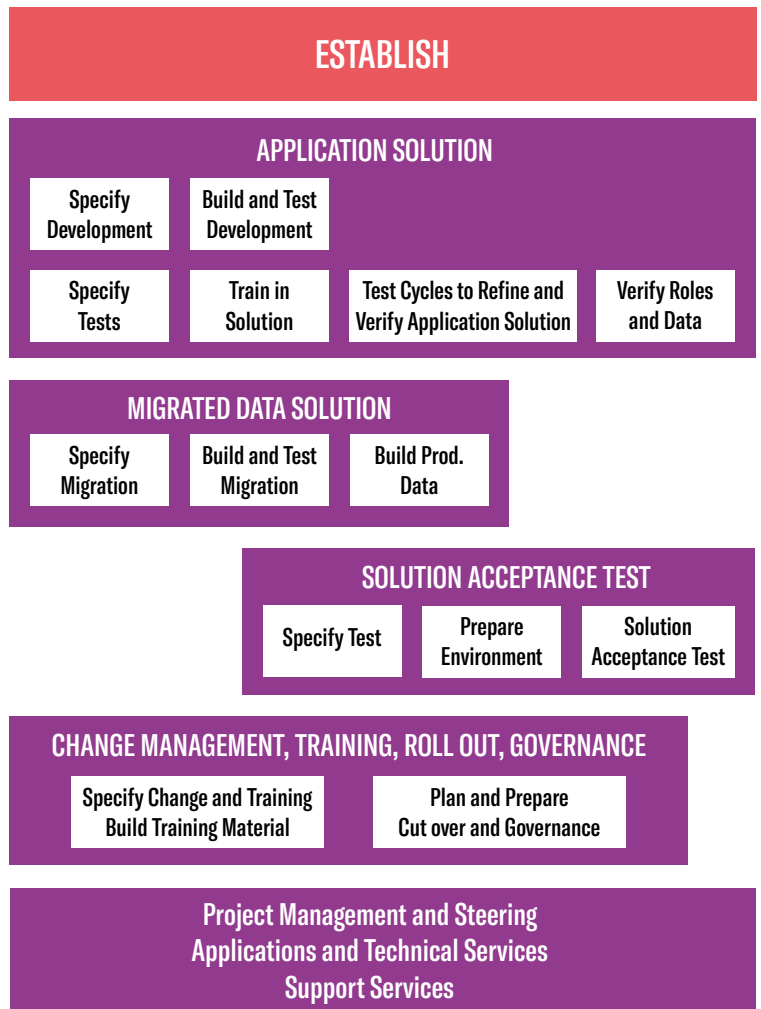
- **Create book of rules:** The work starts with a set of workshops defining generic prerequisites for the solution (customer business, financial and operational steering model, legal and operational structure) and defining answers to specifically prepared questions within each solution area. The results and answers are documented in a book of rules that defines the complete set of prerequisites for the solution.
- **Specify prototype:** The prototype is defined and specified, including end-to-end business processes and other relevant process scenarios. The customer-unique sample data for the prototype is defined here.
- **Build prototype:** IFS builds the first prototype of the solution based on prototype specifications, the defined solution scope and prerequisites as defined in the book of rules.
- **Confirm scope and prototype:** IFS runs the IFS solution for specified end-to-end business scenarios and process scenarios. The customer confirms that the prototype, the refined solution scope and functional specifications meet the agreed requirements and that the prototype solution will be the basis for the full solution delivered in the Establish Solution Project Phase. Afterwards, the refined solution scope is approved and the prototype solution is locked and kept for tracking purposes during the project.
- **Specify functions for development:** Objects for development (interfaces, modifications and, if applicable, configurations and reports) are specified at functional level.
- **Define data scope:** In this stage, the data scope and objects for migration are defined and the need for data cleansing and harmonization is analyzed and defined.

DEFINE DATA SCOPE

IN THIS STAGE, THE DATA SCOPE AND OBJECTS FOR MIGRATION ARE DEFINED AND THE NEED FOR DATA CLEANSING AND HARMONIZATION IS ANALYZED AND DEFINED

PHASE 3: ESTABLISH SOLUTION PHASE

The purpose of the Establish Solution Phase is to refine, build and verify the customer-specific solution. Implementation and rollout of the solution are packaged and prepared.



Establish Solution Phase key activities

Key activities during the Establish Solution Phase include:

APPLICATION SOLUTION, which includes:

- **Specify development:** Development objects (configurations, reports, interfaces and modifications) are defined and specified at a technical level.
- **Build and test development:** Configurations, reports, interfaces and modifications are developed and functionally tested. Business roles, security and profiles are developed and functionally tested.
- **Specify tests:** Test scopes for Verify Solution (Application Solution Tests) and Solution Acceptance Test are refined. Test specifications are delivered and test data defined. Test cycles are planned.

VERIFY SOLUTION

THE CUSTOMER RUNS PROCESSES AND VERIFIES THAT BUSINESS ROLES, SECURITY AND PROFILES ARE SET UP CORRECTLY AND THAT THE PROCESSES CAN BE RUN WITH MIGRATED DATA

- **Train teams:** Customer solution teams are trained in the solution concept and functions using the confirmed prototype solution. IFS trains customer experts in relevant IFS tools.
- **Test cycles to verify application solution:** The prototype solution is used as a basis for the solution and copied into the IFS solution test environment. The parameters and test data are set up for the complete software solution. The customer runs sub-process scenarios and verifies that the delivered software solution fulfills agreed requirements. The software solution is verified in the Test Environment based on Sample Data. Testers are logged on with full access to data functions.
- **Verify solution with end-users and migrated data:** The customer runs processes and verifies that business roles, security and profiles are set up correctly and that the processes can be run with migrated data. The test is verified in the test environment based on migrated data. Testers are logged on as end-users with restricted access to data and functions and with configured profiles.

MIGRATED DATA SOLUTION, which includes:

- **Specify migration:** Exporting and cleansing of data from legacy systems is specified. The cut-over approach is defined.
- **Build and test migration:** Tools for data export, cleansing and migration to IFS solution are developed. Data is exported, cleansed and migrated into the IFS solution migration test environment.
- **Build production data:** Approved basic data is established in the production master environment.

SOLUTION ACCEPTANCE TEST, which includes:

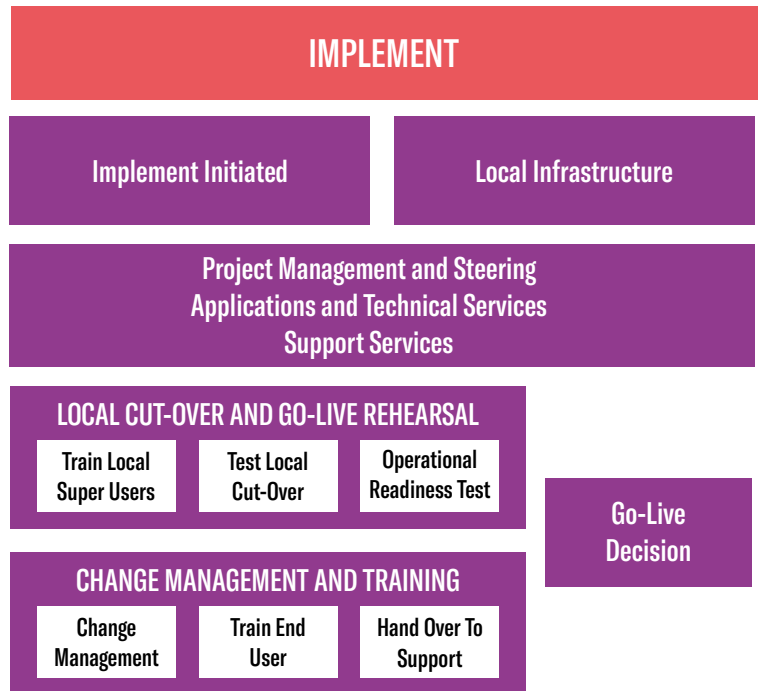
- **Specify test:** Test is defined and specified.
- **Set up and migrate data:** Data is migrated from the legacy systems into the IFS solution environment for the Solution Acceptance Test.
- **Solution Acceptance Test:** The customer verifies that the complete established solution, on business process level, fulfills agreed requirements. The solution is verified during workshops where the customer runs end-to-end business scenarios with migrated data, established business roles, security and profiles.

CHANGE MANAGEMENT, TRAINING, ROLLOUT, GOVERNANCE, which includes:

- **Specify change and training. Build training material:** Change impact analysis is performed and creates the basis for a change management plan and training plan. Training material is produced and work instructions are developed.
- **Plan and prepare cut-over and governance:** Detailed cut-over for go-live and a solution governance model are defined. For projects with an extensive number of rollouts, the rollout strategy is reviewed and template project management plans and operational plans are created for rollout projects.

PHASE 4: IMPLEMENT SOLUTION PHASE

The purpose of the Implement Solution Phase is to rehearse cut-over/go-live and to prepare and train organization for go-live.



Key activities during the Implement Solution Phase include:

- **Local infrastructure:** Local technical infrastructure is established.
- **Local cut-over and go-live rehearsal.**
 - **Train local super users:** Local super users are trained in the solution based on developed training material. The sessions are used to verify super-users have achieved necessary skills.
 - **Test local cut-over:** Local test cut-over is performed according to cut-over plan.
 - **Operational Readiness Test:** The local cut-over is verified during work shops where the customer super users run end-to-end business scenarios.
- **Change management and training:** Planned change management is performed and end-users are trained in the solution based on developed training material and classroom training sessions followed by handover to support.
- **Go Live Decision:** Any remaining open issues are agreed and planned; solution and organizational readiness are assigned; a go-live decision is taken.



PHASE 5: GO-LIVE PHASE

The purpose of the Go-Live Phase is to make the cut-over to the new system as smooth as possible. As the defined go-live criteria are met, a handover to the support organization takes place. Once all sites are up and running, project closing procedures commence.



Go-Live Phase key activities:

The Go-Live Phase is the final phase in IFS Implementation Methodology, which the customer cuts over using the approved solution. Activities include:

- **Go-Live:** Cut-over is performed according to the cut-over plan and the go-live is performed with end-user supported.
- **Evaluate and close project, hand over solution:** Solution is handed over to the governance organization and the project is evaluated and closed.

GO-LIVE PHASE

THE PURPOSE OF THE GO-LIVE PHASE IS TO MAKE THE CUT-OVER TO THE NEW SYSTEM AS SMOOTH AS POSSIBLE

CONCLUSION

IFS Implementation Methodology allows organizations to quickly and confidently tackle new challenges and emerging opportunities, putting them in control of what's next for their business. Businesses that use IFS Implementation Methodology are left with a clear rollout template and highly reusable project documentation, which makes it easier to deploy similar solutions to other countries and sites and simplifies the cost-effective rollout of new modules and configurations. Overall, this means that solutions can be managed more efficiently over the long term. IFS Implementation Methodology gives you the tools and processes you need to reduce risk, speed up time to market and create a platform for future growth. For more information about IFS Implementation Methodology, please contact request@ifs.com.

ABOUT IFS

IFS develops and delivers enterprise software for customers around the world who manufacture and distribute goods, build and maintain assets, and manage service-focused operations. The industry expertise of our people and solutions, together with a commitment to delivering value to every one of our customers, has made IFS a recognized leader and the most recommended supplier in our sector. Our team of 4,000 employees and growing ecosystem of partners support more than 10,000 customers around the world to challenge the status quo and realize their competitive advantage.

Learn more about how our enterprise software solutions can help your business today at [ifs.com](https://www.ifs.com)

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WHERE WE ARE

AMERICAS

+1 888 437 4968

ASIA PACIFIC

+65 63 33 33 00

EUROPE EAST

+48 22 577 45 00

EUROPE CENTRAL

+49 9131 77 340

UK & IRELAND

+44 1784 278222

FRANCE, BENELUX AND IBERICA

+33 3 89 50 72 72

MIDDLE EAST AND AFRICA

+971 4390 0888

NORDICS

+46 13 460 4000