

# INSTALLATION & IMPLEMENTATION



Human Resource Management Software (HRMS)

## Installation & Implementation

This document outlines the process for installation and implementation of the PeopleTrak Human Resources System. Implementation time frame, generally an average of two to four weeks, will depend upon the amount of time you have to devote to this process.

If your data is already in electronic form, single or multiple imports will be performed to enable you to be productive in the shortest possible time. Many of the existing tables can be populated after the import by utilizing the "reverse populate" feature (this feature allows for tables to be populated from your newly imported data in PeopleTrak).

Here is a list of steps that will be followed as your system is installed and implemented. Each step may require one or more sessions with your Customer Resource Manager. Your CRM will be diligent in making certain you complete the necessary steps to complete your implementation within the desired time frame.

### Installation Step

In this step, your CRM will help you install your PeopleTrak software on either a stand alone desktop or your file-server. If a server installation is performed, then an additional step will be performed to activate each of the workstations that will be used to access PeopleTrak. As this task is completed, access to People-Trak from each workstation will be confirmed.

### Setup Conventions Step

Your CRM will assist you in setting up the desired levels of security for each of your users based on your specific needs. You will also be assisted in setting installation preferences such as organization details, logo, etc.

### Data Population Step

People-Trak's Import feature can import standard ascii files, Excel spreadsheet files, and files from other common database platforms. Your CRM will assist you in preparing the files and in executing the imports to populate all available data.

### Build Tables

Once your data is populated, you will be able to take advantage of a unique feature within People-Trak. Using the "reverse population" feature, you can load many common tables such as cities, counties, states, etc, from the data you have imported. In just a few minutes, you can populate as many tables as are supported by the data you have imported. Your CRM will assist you in setting up any tables that cannot be reverse populated or that you may need assistance with.

### Data Validation Step

Working with your CRM, you will validate the data that has been imported and/or reverse populated. Using tools within People-Trak, many data items can be corrected or adjusted to standardize data to prepare for reporting. You may be introduced to the auditing features within People-Trak to assist with ongoing data integrity.

### Identify Further Training Needs

Having now worked extensively with People-Trak and your CRM, your CRM may recommend a training program based on your specific needs. This program may be offered as a series of regular appointments with your CRM in the course of normal support. If your needs are greater, enrollment in one of our formal training programs may be recommended.

### Set Proficiency Goals

At this point, you will be proficient in the basic use of People-Trak. You will now work with your CRM to establish a series of proficiency goals that you can achieve together over time. For example, you may wish to become more proficient with our report writer. Or you may wish to learn more about using People-Trak for performance management. These and many other goals can be set forth with your CRM. With regular appointments, coupled with daily use of the product, your proficiency goals will be met.

### Upgrades

People-Trak is not a static product. It is updated and upgraded on a regular basis. The installation of updates and upgrades is a part of your ongoing annual maintenance. Your CRM will assist you in installing upgrades on an appointment basis, explain new features, and show you how to take advantage of them.