



# WorkiQ Resource Requirements

## Document Overview

The purpose of this document is to provide a reasonable estimation of resources required for a new deployment of OpenConnect’s WorkiQ® solution. Implementation resources may vary based on the preferences of the customer and preferred capture environments. As such, the requirements outlined in this document should not be considered complete until accompanied by a requirements review and Statement of Work (SoW).

## Roles Used in this Document

Customer roles		OpenConnect roles	
<b>Business Owner</b>	Businessperson responsible for WorkiQ	<b>Sales Executive</b>	OpenConnect person responsible for the account
<b>Business Project Manager</b>	Person responsible for delivering the project	<b>Project Manager</b>	Person responsible for delivering the project for the business
<b>IT Project Manager</b>	Person responsible for delivering the project for IT		
<b>IT Desktop Support</b>	Person responsible for testing and deploying the desktop component (Gatherer)	<b>Solution Architect</b>	Person responsible for designing the solution and working with customer IT to deploy WorkiQ
<b>IT Server Support</b>	Person responsible for supporting the server that will host WorkiQ		
<b>IT Citrix Support</b>	Team responsible for testing and deploying new Citrix-based applications <i>[optional]</i>		
<b>Business Manager</b>	Typically, person(s) responsible for the users who will be measured	<b>Trainer</b>	Person responsible for training the customer to support and use WorkiQ
<b>Business Users</b>	People who will be using WorkiQ		

## WorkiQ Server Requirements

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The following are the server requirements for WorkiQ:

<b>CPU:</b>	8 Cores
<b>Memory:</b>	32GB
<b>Available Storage:</b>	600GB
<b>Operating System:</b>	64-Bit Windows or Linux

## Stage 1: Planning

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The planning stage is used to create a deployment plan. The OpenConnect Services Team will work directly with the customer's IT team to create a plan that conforms to the customer processes and procedures. Companies have different processes and standards, so it's important to work together to make sure the OpenConnect software deployment can be accomplished within the customer processes.

## Time Required: One to Two Hours

The planning stage is usually accomplished with one or two one-hour meetings. All meetings can be accomplished remotely. Some customers prefer to have two separate meetings, one for desktop planning and one for server installation planning.

## Customer Resources Required

- IT Desktop Support
- IT Server Support
- Project Manager(s)

## Stage 2: Product Installation (Remote)

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The product installation stage is performed remotely and consists of the following tasks:

- Product installation and IT training
- Desktop testing
- Citrix deployment [optional]
- Gatherer deployment

### Task: Product Installation & IT Training

The server software will be installed by the IT Server Support personnel with OpenConnect guidance. The desktop software deployment plan should be in place to allow the deployment to be accomplished directly after the server software is installed.

IT training will also be provided during the software installation. The training includes:

- Installation instructions and best practices for installing and upgrading the server software
- Server software configuration and best practices

### Time required: One day

Actual installation of the software usually takes only a few hours, but an entire day should be planned so that time is available to handle potential issues and training/mentoring can be included. This task includes installation and configuration of the server software.

### Customer resources required

- IT Server Support
- Any IT resources that need to be familiar with the product

## Task: Desktop Testing

Almost all companies have processes that require testing of any software that will be installed on end user desktops or remote access servers. WorkiQ requires a desktop agent installed on each desktop used by employees that will be measured. OpenConnect will work with the Desktop Support team to provide software, documentation, and support to allow them to fully test the desktop component to meet their internal standards.

In order to fully test the desktop component, the server software must be installed and running so that the desktop component can send events. Although this may not be required for all IT departments, OpenConnect will work with the customer to provide this environment.

Part of the desktop testing should include a deployment strategy. Most companies have a way to centrally manage desktop software. A deployment script should be created and tested during this stage so that the desktop software can be deployed to the correct desktops directly after the server software installation.

### Time Required: Varied

The time required is dependent on the Customer processes. OpenConnect will be available to answer questions and to help in any way necessary to make this process run as smoothly as possible.

### Customer Resources Required

- IT Desktop Support

## Task: Citrix Deployments (Optional)

If the WorkiQ desktop agent will be deployed on one or more Citrix® servers, the Citrix Support team should test the WorkiQ desktop agent and perform any standard capacity planning procedures used when adding additional Citrix applications.

### Time Required: Varied

The time required is dependent on the customer processes. OpenConnect will be available to answer questions and to help in any way necessary to make this process run as smoothly as possible.

### Customer Resources Required

- IT Citrix Support

## Task: Gatherer Deployment

Desktop Support should already have both a deployment script configured and the software in place to deploy to the designated desktops. This task is to deploy the Gatherer to the designated desktops. Once it is deployed, full end-to-end testing can be performed.

### Time Required: Two hours

The deployment process could be as simple as pushing a button. The time required for this task includes the actual deployment, as well as end-to-end testing to make sure the Gatherers were deployed correctly.

### Customer Resources Required

- IT Desktop Support
- IT Server Support

## Stage 3: On-site training and mentoring

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The product installation stage is a four- to five-day engagement that will be performed at the customer site and consist of the following tasks:

- Business user training
- Mentoring
- Processes [optional]
- Network collection [optional]

### Task: Business User Training

The business user training consists of the daily usage of WorkiQ, including creating reports, using reports, scheduling reports, etc.

#### Time Required: One Day

The required time includes several two- to three-hour meetings to cover the entire business staff. The time required for each person is two to three hours.

#### Customer Resources Required

- Business managers
- Business users

### Task: Mentoring

OpenConnect resources will be available to work with both IT and business personnel to guide and answer questions.

#### Time Required: Two days

The actual time spent on mentoring will be determined by the time spent to do all other tasks. The total deployment time is five days. The time left after completing all tasks will be used for mentoring.

#### Customer resources required

- Business users
- IT resources, if necessary

## Task: Processes (Optional)

Most WorkiQ customers achieve significant ROI by simply identifying productive and non-productive work. An additional step of adding processes can increase the value of WorkiQ. Processes: (a.) measure the amount of time each employee spends performing a specific task, and (b.) count the number of times the task was performed. To define processes, an SME must be able to demonstrate the starting point and ending point of a repeatable task.

### Time Required: Varied

Depending on the complexity of the application and the process, the amount of time to define a process can vary from a few hours to a few days per process.

### Customer Resources Required

- Person responsible for managing processes
- Process SME

## Task: Network Collection (Optional)

WorkiQ has an optional component, the Network Collector, that will collect TN3270 data directly from the network, instead of through the end user's emulator. If the customer wishes either to identify specific mainframe applications or create processes against mainframe navigation, network collection provides a more accurate view of the data. The Network Collector works by attaching to a span or tap on the network.

### Time Required: Varied

The task to install the Network Collector software components usually takes only a few hours. However, the effort to set up the span or tap on the network is dependent on the skillset of the customer network team and the current network architecture.

### Customer Resources Required

- IT network support
- Any IT resources that need to be familiar with the product.

## Summary of Time Requirements

ROLE	TASKS	TIME REQUIRED
<b>Project Manager</b>		
<b>IT Desktop Support</b>	<ul style="list-style-type: none"> <li>▪ Planning</li> <li>▪ Product installation</li> <li>▪ Gatherer deployment</li> </ul>	12–16 hours (Some of this time is dependent on internal customer processes)
<b>IT Server Support</b>	<ul style="list-style-type: none"> <li>▪ Planning</li> <li>▪ Desktop testing</li> <li>▪ Gatherer deployment</li> <li>▪ IT training</li> </ul>	10–12 hours (Does not include hardware setup)
<b>Business Manager</b>	<ul style="list-style-type: none"> <li>▪ Business training</li> <li>▪ Mentoring</li> </ul>	8 hours
<b>Business Users</b>	<ul style="list-style-type: none"> <li>▪ Business training</li> <li>▪ Mentoring</li> </ul>	2 to 3 hours

## Post-Production Training & Mentoring

After the initial deployment, WorkiQ customers typically spend time gathering data and allow managers the opportunity to coach associates for individual improvement. As their use of WorkiQ matures, most customers identify new applications to classify, and rapidly find new ways to apply operational insights. Once operations normalize, OpenConnect offers follow-on services that can be tailored for each customer — such as training and mentoring, data analysis, and health checks. For more details regarding these additional services, please contact your OpenConnect Account Team.

## About OpenConnect

OpenConnect is the leader in process intelligence and desktop analytics solutions that objectively identify and illuminate workforce activity, resulting in associated productivity gains. With OpenConnect’s software robotic process automation, the costliest processes performed by a workforce can be automated. Combining unparalleled experience and solution capabilities, OpenConnect enables its clients to more quickly address and adapt to today’s operational and competitive challenges, often summarized as accomplishing more with fewer resources.