



IAMTechTM

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iPlan Technical FAQ

Typical questions and responses when explaining iPlan software to technical stakeholders

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Environment & Security question summary

- Where does iPlan live?
- What level of availability do you guarantee?
- What processes do you have in place for unplanned outages?
- Describe your process for clients reporting system issues?
- What data protection compliance measures are in place for the protection of customer data?
- Do you provide out of hours support?
- How do you intend to provide support for bugs/fixes and schedule for priority?
- Do you have a standard approach and methodology for implementing cloud applications?
- How robust has your system been in the last **3** years?
- Please provide information on how we access the software?
- What KPIs are set out for the monitoring of the Software performance?

Q. Where does iPlan live?

A. iPlan is a cloud based software solution, so it lives upon servers hosted on the internet.

Specifically we utilise Azure server sites around the globe for our primary LIVE environment (to help reduce latency and cater for data laws of specific countries).

We also utilise Amazon Web Services for redundancy as part of our disaster recovery plan.



Q. What level of availability do you guarantee?

A. 99.9% per annum



Q. What processes do you have in place for unplanned outages?

A. We have warm standby server environments, with multiple cloud platform providers, enabling failover, minimising downtime

In the event of a production environment suffering an outage, we failover to an alternative environment



Q. Describe your process for clients to report system issues

A. We provide all Customer Support Representatives (CSR's) with telephone and email support contact details

Our servicedesk provides 24/7 phone support

Upon contacting our servicedesk via phone or email CSR is given a ticket number which lives for the duration of the issue



Q. What data protection compliance measures are in place for the protection of customer data?

A. We have many initiatives, process's etc. to try and meet Directive 95/46/EC, for example;

Our company is registered under the data protection act

Employee service agreements contain necessary policies do facilitate client data protection

Data protection responsibilities form part of role profiles for key personnel in the business. This is validated by an annual data protection audit

We subscribe to OWASP, and hold monthly OWASP reviews and improvement cycles

Compliance with BP Plc VSOP standard, incl. monthly pen test and risk reduction measures



Q. Do you provide out of hours support?

A. Yes, our servicedesk provides 24/7 phone support



Q. How do you intend to provide support for bugs/fixes and schedule for priority?

A. Via our inhouse servicedesk

Resolution time is driven by priority class. Priority class is based upon severity of issue

Resolution & priority is agreed with client and documented as a schedule in a Maintenance & Support schedule



Q. Do you have a standard approach and methodology for implementing cloud applications?

A. Yes – for both their development and delivery

For development, we use an agile process framework, refined over the last 10 years of our experience

For deployment, we use NIST cloud deployment methodology, but permit a degree of flexibility to ensure we can meet client requirements



Q. How robust has your system been in the last 3 years?

A. Our end users have experienced no outages, 0 minutes, in the last 3 years

System updates are applied every 28 days as planned maintenance. First, we test updates on one of the failover instances described above

When they are applied to primary instances we redirect end user to a second instance, then redirect them back to a primary instance post update been applied



Q. Please provide information on how we access the software?

A. Software uses Microsoft Forefront Identity Manager to manage digital identities, credentials etc

User is provided a https: URL, username and password

Identities can be managed by both 'Admins' within the customers domain and by ourselves as the provider



Q. What KPIs are set out for the monitoring of the Software performance?

A. We utilise application monitoring tools to assist our servicedesk engineers to discover, isolate and solve problems

The KPIs used to measure the success of the above monitoring are;

- Customer satisfaction
- Mean time between failures
- Mean time to recover/repair
- Application crash rate
- Cost per ticket
- Service Desk engineer utilization
- Ticket first contact resolution rate





Licensing options question summary

- What licensing options are available?
- Why no user limits?
- What is the difference between annual and perpetual licensing?
- Who owns the data created in the system?
- Do we have to pay additional monies for iPlan mobile?
- Can we use iPlan mobile without paying for iPlan Enterprise licensing?
- What is included in my license charge?
- Will your updates to the software be included as part of the license fee or are they at additional costs?
- Can iPlan be hosted by ourselves in our own domain?

Q. What licensing options are available?

A. In relation to term, both Annual and Perpetual are available. When licensing annually, payment can be made on a monthly basis!

In relation to user level we have three tiers;

- Single user
- Site license (no limit to user numbers at a physical location)
- Legal entity (your entire organisation, no limit to user numbers)



Q. Why no user limits?

A. If we said a specific license type had a user limit, you will immediately restrict the number of users who you grant access to the software

If we do not cap the user limit, everyone who needs to (and even some users you hadn't thought of granting a license to), will get to use the software, meaning you get the maximum value from the software & your investment. In exchange we get to retain a very happy customer!



Q. What is the difference between Annual & Perpetual licensing?

A. Term and payment milestones are the main differences!

Annual license term is 12 months. Perpetual can typically be anything from 3yrs, 5yrs, right up to a 99 year period

With Annual you will pay for each year in turn

With Perpetual you will pay for the entire term in year 1. This means more cash leaving your business in Year 1, for which, in exchange you get a discount in the overall cost

In the long term, Perpetual works out to be more cost effective than Annual



Q. Who owns the data created in the system?

A. You, the customer, own the data in the system

At any point in the relationship you can ask for a copy of your data

This can also be formalised in our agreement, with us providing data drops on an agreed frequency

You can also go a stage further and ask us to deposit data in to Escrow

Please note data deposits incur a small additional charge



Q. Do we have to pay additional monies for iPlan mobile?

No, all the benefits of iPlan mobile come inclusive within you iPlan

A. enterprise cost



Q. Can we use iPlan mobile without paying for iPlan enterprise?

A. No, you need to have an iPlan Enterprise license to utilise iPlan mobile!



Q. What is included in my license charge?

A. Everything 😊 In the one agreed sum, you will get your license, hosting, maintenance and support. No extra hidden costs or unwanted surprises.



Q. Will your updates to the software be included as part of the license fee or are they at additional costs?

A. Yes, all updates funded by ourselves as part of the products road map are provided free of any additional charge, inclusive in your license, hosting, maintenance and support agreement!



Q. Can iPlan be hosted on our own domain?

A. Absolutely!

Integration of iPlan in to your domain will require us to work together on a project to make this happen

This project would incur costs for our time, your time and the necessary server infrastructure and licensing

We would also ask that we have access to the servers where iPlan is hosted to enable us to provide support





Interface question summary

- Which planning software can iPlan interface with and how?
- Which enterprise resource planning (ERP) software can iPlan interface with?
- Can iPlan interface with other systems within our domain?
- How does iPlan mobile send data from the work site?
- Can iPlan mobile work offline?
- Can iPlan be used in a high hazard environment?
- How can we get our data in to iPlan, for example a scope of work?
- What other data can be outputted from iPlan?
- Are we able to apply localisation to the software?

Q. Which planning software can iPlan interface with & how?

A. iPlan can work with Microsoft Project, Oracles Primavera and Deltek's Open Plan

iPlan users can generate export files from iPlan, that they can then manually import in to the above planning software

OR

We can create real-time connectivity to planning tools in your domain

OR

We can host Primavera, link it to iPlan and then grant you access to Primavera via the web



Q. Which ERP software can iPlan interface with?

A. SAP

Maximo

IFS

Microsoft Dynamics

Your own bespoke EIS!

See overleaf for how iPlan can integrate with SAP



Option 1;

This option requires no SAP portal / comms

iPlan creates a .CSV export to match existing SAP field names and data syntax. A SAP end user then imports this to SAP through SAP software interface. Cheap and cheerful, not ideal, but enables data gathered in iPlan to be imported in to SAP without duplication of data entry effort!

Option 2;

SAP issues order, operations and service details on a set frequency (typically once every 24hrs) to iPlan via a secure cloud (internet) protocol.

iPlan updates information and sends it back on set frequency.

This process requires a cooperative SAP administrator(s) – uses custom code calling stored procedures, meaning no additional SAP licensing costs.

This method is more secure, does not rely on a human to manually perform updates like Option 1, and does not affect clients SAP licensing costs, but does require cooperation and a level of configuration by clients SAP admin(s).

This is the method used between iPlan and one of the 5 largest energy companies in the world – so to be considered an acceptable method!

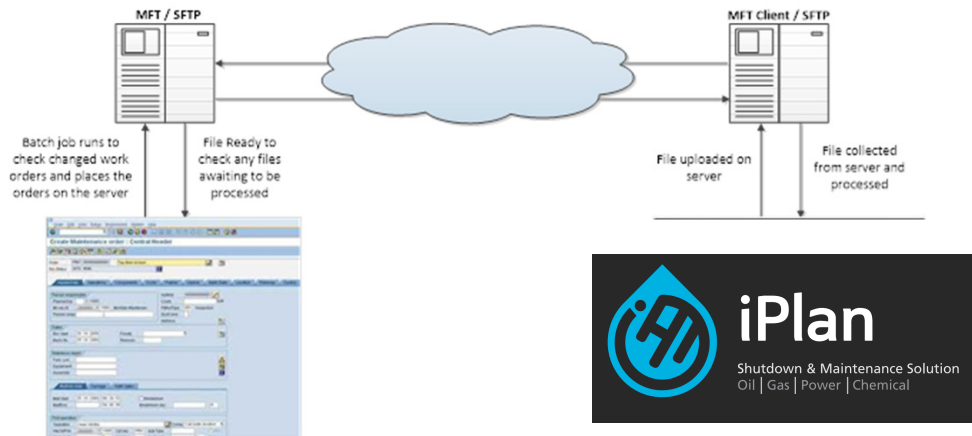


Figure 1: Illustrating the data transfer method between SAP and iPlan

Option 3;

Similar in function to 2 above, but instead of custom code calling stored procedures uses SAP Netweaver Process Integration (PI) – client may incur additional SAP licensing charges and SAP consultancy charges – but has the most robust outcome.



Figure 2: High level process flow diagram illustrating the key process steps (highlighted) for the iPlan to SAP Maintenance Order service update interface

Option 3;

Similar in function to 2 above, but instead of custom code calling stored procedures uses SAP Netweaver Process Integration (PI) – client may incur additional SAP licensing charges and SAP consultancy charges – but has the most robust outcome.

Q. Can iPlan interface with other systems in our domain?

A. Yes, we are regularly asked to create interfaces between iPlan and other software systems in our clients domains.

This involves a requirements gathering process, the outcome of which allows us to produce a project plan and estimate, and you to decide if the cost of the integration is worthy of the value your company will gain.



Q. How does iPlan mobile send data from the work site?

A. Over the internet via 3G/4G or local WIFI - This requires the mobile the iPlan end user is using to have connectivity!



Q. Can iPlan mobile work offline?

A. Yes, we recognise that it is not always possible to have connectivity to the internet in plant environments, therefore iPlan mobile works on a batch and forward basis

A planner, estimator or supervisor is able to download all jobs and activities before leaving his or her site office / control room and work the whole day offline, synchronising their work when they return to the office or have connectivity during their work day



Q. Can iPlan be used in a high hazard environment?

A. Yes, we have partnered with ecom-ex in Germany to provide iPlan on intrinsically safe (zone 1 & Zone 2) tablets and smartphones. This enables iPlan to be operated in hazardous areas, without increased risk of explosion or fire



Q. How can we get our data in to iPlan, for example a scope of work?

A. iPlan users can manually import data such as a scope of work via iPlan's work list importer

In addition we can work together to provide data in to iPlan from other software systems in your domain, such as your ERP



Q. What other data can be outputted from iPlan?

A. In addition to iPlans suite of reports, you can output;

Weekly and Monthly Valuations

Work packs

Customer work / estimate approval via email

Time recording

Material lists for material take off

You can also build your own export using 17 criteria to write your own query



Q. Are we able to apply localisation to iPlan?

A. Yes, iPlan has a localisation engine, allowing us to apply your business's maintenance and shutdown language / terminology to the software

