
Roxy Software Inc.

**Pirouette – Version 4
Implementation Guide**

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Welcome to Pirouette

This guide is designed to assist you with the Pirouette implementation process. It describes each phase of the implementation process and identifies the various steps to be carried out. The information provided will be relevant and applicable to most organizations, despite differences in size, structure, and programs. However, we encourage you to treat the information as a reference, adapting it as necessary to suit your particular organization.

To help you track your progress and determine next steps, a **Pirouette Implementation Checklist** is enclosed at the end of the guide. This checklist summarizes all of the steps contained in the guide and provides an overview of the implementation process. Page references are included in the checklist to help you quickly locate information about each step. We recommend that you check off boxes as you complete each task, or indicate if something is not applicable to your organization.

Phase I: Getting Started

This section of the guide outlines how you should start the Pirouette implementation process. It provides information on key roles and their related responsibilities.

Step 1: Identify Your Key Roles

There are typically three key roles that are critical to your ongoing success with Pirouette: 1) an IT contact, 2) a Pirouette administrator, and 3) a group of key decision makers. Identifying these roles and their responsibilities at the start of the implementation process will go a long way in helping the process to run smoothly. It also helps you to get the most out of the software once it is actively in use.

Once you have identified the appropriate individuals to fill these roles, add their names to the enclosed checklist for ongoing reference.

IT Contact

In most cases, the IT contact for Pirouette will be the person who provides IT support to the organization in general. This may or may not be a member of your own staff.

The IT contact is responsible for getting the organization's IT infrastructure (the server and the workstation computers) ready, so that Pirouette can be successfully installed. This person plays a key role in managing privacy and security issues related to the organization's computer systems and their use. The IT contact also performs routine system maintenance once Pirouette is in use, and may be responsible for performing regular back-ups of the system's data if your organization does not have a system administrator to do this.

Pirouette Administrator

The Pirouette administrator performs a wide variety of duties related to maintaining the database and its data. Once Pirouette is installed, the administrator is responsible for getting the system ready for staff use. This involves configuring the database, and creating user accounts so staff can access the system. Once the system is in use, the administrator is responsible for monitoring the quality and accuracy of the data being entered into the system, thereby ensuring that effective reporting and data analysis is possible.

A background in database administration or system administration is helpful for this role, but not critical. However, strong technical skills and data management skills are useful.

Other Decision Makers

During Pirouette's installation and throughout its ongoing use, decisions must be made on a number of issues. Technical decisions and data management decisions will clearly draw upon the expertise of the IT contact and the administrator respectively. However, there are many decisions that will likely require input from other staff members, such as:

- timelines and target dates for software implementation
- coordinating staff training
- identifying reporting requirements
- developing policies and procedures governing data entry

Input will be required from other staff members who have the knowledge and authority to make or contribute to decisions in areas such as those mentioned above. In addition to the IT contact and the administrator, this group typically includes program managers.

Phase II: Getting It Up and Running

This section of the guide outlines what you need to do to get Pirouette up and running effectively in your organization.

Step 1: Get Your Server Ready

Decide Where Your Server Will Be Hosted

In order to get Pirouette software up and running, it must first be installed on a server. This might be the organization's server, located on the organization's premises; this is referred to as *local hosting*. Or, you may wish to have Roxy Software host the server for you, off-site. Your IT contact can provide input and help you to determine the best option for your particular organization. We have outlined some of the key issues that you will want to consider.

One important issue for consideration is the security of your system and your data. A significant advantage of Roxy Software hosting is that your server is located at a high-security facility, thereby alleviating security concerns.

Another important issue for consideration is the location(s) that users will be at when they are accessing the system. Local hosting provides the fastest connectivity if all of the users are accessing the system from a single site (assuming that the server is hosted at that same site.) This is because the local users and the server are both on the same network.

If, however, users are accessing the system from multiple sites and locations (eg: staff working from home), remote hosting by Roxy Software will provide the fastest connectivity and will likely be a more suitable option. Our hosting services utilize a powerful internet connection for optimal database performance, regardless of user location. You can expect an internet connection that is up to 200 times faster than a typical DSL or cable connection. For an individual organization, this type of internet service would be extremely expensive. Our hosting service allows you to enjoy this level of performance at a fraction of the cost.

Issues such as file-sharing and print-sharing should also be considered. A server hosted by Roxy Software will be dedicated solely to Pirouette; it wouldn't be used for services such as file-sharing and print-sharing.

Lastly, if you don't have on-site IT staff to install and maintain the software, or you lack the appropriate hardware, we strongly recommend that you consider our hosting service. We'll set up the server, complete the installation, and send you a web link to your Pirouette install. It's the hassle-free way to get up and running quickly, and you don't have to worry about ongoing maintenance of the server.

Verify Your Server Requirements (if hosting locally)

If you decide to host your server locally, have your IT contact verify that the following hardware and software requirements have been met.

Hardware requirements:

Microsoft Windows 2000 or 2003 Server
Microsoft SQL Server 2005

Software requirements:

Pentium III 1GHz or higher
512MB RAM
30GB hard drive
CD burner or tape drive (for backups)

Once Pirouette is installed on your server, it can be accessed remotely from other sites and locations. There is no need to install additional client software

Step 2: Get Your Workstations Ready

Verify Your Workstation Requirements

Once Pirouette is installed on the server, it can be accessed from any workstation. Most computers, even significantly older machines, will readily meet all the requirements necessary to access Pirouette. Have your IT contact verify that these requirements have been met. The following list of features provides you with some guidelines on what is required:

- Microsoft Windows 95, 98, NT, ME, 2000, or XP (Home or Professional)
- Microsoft Internet Explorer 5.5 or newer (this is standard on Microsoft Windows 2000 and later editions) *The 5.5 and newer editions come with many necessary improvements including stronger encryption. This browser is available as a free upgrade from Microsoft.*
- Pentium II
- 128MB RAM
- Internet connection
- Configuration or removal of internet explorer popup blockers on each workstation
- Configuration of your database server as a trusted site within internet explorer on each workstation

Note: Pirouette cannot be accessed from a Mac computer.

An easy method of identifying whether or not your organization meets the minimum requirements is to complete the following inventory for each workstation in your office:

- Unique Computer Identification: (example: Jim's Workstation, or Asset# 65355)
- Operating System: (example: Windows XP Professional)
- Service Pack/Patch Level: (example: Service pack 2)
- Processor: (example: Pentium 4, 2.8Ghz)
- Memory: (example: 256MB)
- Internet Explorer version: (example: IE 6.0)
- Internet/intranet connectivity: (example: corporate LAN – DSL, or Dial-up)

“Spyware” and/or uncontained viruses will impede a computer’s performance when accessing the Pirouette database. Therefore, if your organization is taking the time to inventory each of the workstations, this is an opportune time to check and remove unwelcome spyware.

Remove Pop-up Blockers

Due to the nature of the database software, you should remove any third party pop-up blocker software such as the Google or Yahoo toolbars.

Step 3: Define a Security Strategy

There are a number of risks involved in managing large volumes of client information electronically. Every organization should consider these risks thoroughly, and be proactive in implementing appropriate privacy and security mechanisms in order to mitigate these risks.

Why your organization needs a security strategy:

There are several reasons why you should be concerned about privacy and security issues. As part of the case management process, clients share a great deal of personal information. This information is recorded in the client management database system for future reference, reporting, and analytical purposes. Although the intent is to provide benefits to clients, once stored in a database, this information is potentially accessible to many people who could use it inappropriately. With this in mind, consider the following:

- Electronic systems inherently pose a greater risk than the use of paper-based decentralized record keeping systems.
- A high level of turnover among staff contributes to the likelihood of inadequate training and ineffective enforcement of security policies and standards.
- Most security breaches are by people who are authorized to use the system.

For all of the reasons cited above, it is in your best interest to develop formal procedures to govern the behavior of staff; and technical solutions to protect privacy and security. It is the responsibility of every organization to formulate its own security strategy. Your IT contact can assist you with this.

Complete a Security Audit

We would advise all organizations to have their IT contact perform a complete security audit. The security audit should include a complete review of your organization's network infrastructure, server security, internet security, and password utilization.

Purchase an SSL Certificate

As part of the security audit, it may be recommended that you purchase an SSL certificate for your server. SSL is a special encrypting method used for transmitting private information over the internet. SSL keeps the communication between your server and workstations – that is, your client data – secure, by encrypting it. Your IT contact can assist you in acquiring an SSL certificate and configuring your server for its use.

Note: servers hosted with Roxy Software are configured to use SSL security by default.

Formulate a Password Policy

Effective password selection is an important part of an organization's security strategy, and plays an important role in helping to protect your client data. Therefore, we recommend that all organizations formulate a policy regarding the minimum length and complexity of all passwords.

Example: all passwords must contain at least eight characters, four of which must be numbers. Ideally, the Pirouette administrator (or someone in a comparable role) should be responsible for the creation and maintenance of all passwords. This eliminates the possibility of employees inadvertently selecting passwords that are too obvious, and it ensures that all passwords conform to the organization's policy.

Step 4: Get Your Database Ready

Get the Database Installed

Roxy Software can assist you with the initial installation and testing of the Pirouette database, so that the software is functional and ready to be used within your organization.

(If you are using Roxy Software's hosting service, we'll set up the server, complete the installation, and send you a web link to your Pirouette install.) Once the database is installed, the next step is database configuration.

Configuration refers to the process of customizing the database so that it is ready for use. The organization's data manager is responsible for getting the database ready for staff use. This involves configuring the database and creating user accounts for staff so they can access the system. The primary configuration functions are:

- configuration of the program structure
- creation and configuration of user accounts
- configuration of drop-down lists

A brief description of each of these configuration functions is provided below. However, for detailed steps on how to perform these and other configuration functions, see the Pirouette Administrators Manual.

Configure Your Program Structure

One of the most important configuration options in the database software is the configuration of your program/service structure, eg: case management, crisis support, etc. This determines how client data will be categorized in the database, and the type of reporting (and analysis) you'll be able to do with the data. Ideally, your program/service structure should be configured in a way that is meaningful to the users who are entering client data. But you should also think about your organization's reporting requirements, as well as the way in which the data will ultimately need to be compiled.

Create User Accounts

In order for employees to access Pirouette, a corresponding record must be created in the database that contains information such as the user's full name, login name, and password. This employee record is referred to as the Pirouette user account. As previously stated, we recommend that the administrator create all passwords. This eliminates the possibility of a user selecting a password that is too obvious, and it ensures that all passwords conform to the organization's policy.

Configure Your Drop-down Lists

Upon initial installation, Pirouette is preconfigured with drop-down lists. In many cases, the information contained within these lists serves as a great starting point, and might even be completely adequate for your organization's needs. However, you should review the lists and revise them as necessary to suit your particular organization.

It should also be noted that the overall intention of gathering information is to aggregate the data. An additional item should only be added to a drop-down list if it contributes to the overall quality and meaningfulness of the data being collected. For example, adding a large number of very specific ailments to the physical health issues list will not only make the list quite lengthy, but the specificity of the data would make it less meaningful.

Step 5: Get Your Staff Ready

Get Your Staff Trained

The Pirouette online training course provides a comprehensive introduction to the system for you and your staff. You can work through the four-hour course at your own pace and schedule - it will remember where you left off, so you can complete the course in one sitting, or over several days. Quiz questions are included after each section to help ensure that the material is fully understood, and management reports are available on staff progress and performance. In order to maximize the benefits of this training, staff should have access to the system during or soon after the training.

Phase III: Keeping It Running

This section of the guide outlines what is required to get the most out of your system and your data. It provides recommendations for collecting, checking, and protecting your data.

Step 1: Collect Accurate and Meaningful Data

Now that your Pirouette client management software is in use, you want to collect client data that is both accurate and meaningful. We encourage you to establish policies and procedures regarding client data collection, and to have these policies and procedures formally documented. Not only will this be of benefit to your current staff, it will prove extremely useful during periods of staff turnover.

When developing your policies and procedures, we recommend that you:

- identify minimum data requirements
- establish common terms and definitions

We have elaborated on both of these below.

Identify Minimum Data Requirements

For a variety of reasons, organizations do not all collect the same amount of data. Even within an organization, the amount of data collected by different programs may vary greatly. In view of this, it is important that organizations identify their minimum data requirements. This will be shaped by a number of factors, such as the nature of the program/services, the client population being served, and typical circumstances at the time of data collection. In addition, you should consider any official reporting requirements that your organization must adhere to, eg: funders' reporting standards.

Establish Common Terms and Definitions

A term such as *referral date* could mean the date a client initiates contact with your organization via voicemail. Or, it could mean the date one of your staff returns the voicemail message and speaks with the client. Or, it could mean the date your staff meets with the client in person. This type of broad interpretation can have a huge impact on how your client data gets interpreted and entered into the database. Taking the time to establish and document common terms and definitions will contribute to accurate and consistent data entry by all employees.

Step 2: Check Your Data

Schedule Routine Data Entry Checks

Accurate data entry is extremely important; the data that goes into your system will ultimately impact the information and reports that you are able to pull from the system. Therefore, end users of the system should be thoroughly trained in how to enter data, and they should be advised of the importance of accurate data entry. Where possible, it is preferable if the person who collects the data also enters it into the system, as this typically enhances data accuracy.

In addition to having everyone check their own data entry, you may wish to designate one person to check data accuracy on a regular basis. This routine data entry check can be done by reviewing a random sample of all data entered; or by checking the database information against intake forms or other hard-copy records.

Schedule Routine Reports

We advise that you identify some routine reports that you can generate and review on a regular basis. This will allow you to identify and resolve data entry issues promptly.

Step 3: Protect Your Data

Schedule Regular Data Back-ups and Test Restores

Your IT contact or system administrator should have a system in place for performing regular back-ups. This ensures that in the event of a hardware failure or accidental deletion, your data will be protected.

In addition to backing up your data, regular “test restores” should be scheduled, whereby your data is recovered from the back-up tapes. This is a critical part of the back-up process that should not be overlooked. If your back-ups are being compromised in any way (eg: the back-up tapes are wearing out), you’ll want to discover this during a test restore, while you still have an opportunity to rectify the problem. Regular test restores verify that your data can indeed be recovered, should this ever be necessary.

Step 4: Define a Support Strategy for Users

Once Pirouette is actively in use, issues will arise from time to time. We encourage organizations to define a support strategy, so staff know what to do and who to go to when they encounter difficulties.

A typical support strategy categorizes issues based on the nature of the issue, and identifies the appropriate steps to be taken or the appropriate individual to contact to resolve such issues. For example, users might be advised to contact the IT person for general computer issues, and the Pirouette administrator for database issues.

As part of your support strategy, you will want to let staff know that they can access extensive documentation on Pirouette from the Roxy Software website. We encourage all users to make use of this resource, as routine questions about Pirouette can often be answered quickly and easily by reviewing the relevant documentation.

Another key resource that you have as part of your support strategy is your Roxy Software service plan. Your service plan allows you to access support and assistance from us when you need it. Most organizations find it useful to contact us for support when they: perform more advanced database configuration steps, begin to use additional Pirouette modules, or encounter non-routine database issues.

Pirouette Implementation Checklist

Phase I: Getting Started

Step 1: Identify Your Key Roles (pg. 3-4)

- IT Contact:_____
- Pirouette Administrator:_____
- Other Decision Makers:_____
- _____
- _____

Phase II: Getting It Up and Running

Step 1: Get Your Server Ready (pg. 5-6)

- Decide Where Your Server Will Be Hosted: Locally_____ Remotely_____
- Identify Your Hosting Provider (if hosting remotely):_____
- Verify Your Server Requirements (if hosting locally)
- Schedule Regular Data Back-ups and Test Restores

Step 2: Get Your Workstations Ready (pg. 6-7)

- Verify your Workstation Requirements
- Remove Pop-up Blockers

Step 3: Define a Security Strategy (pg. 7-8)

- Complete a Security Audit
- Purchase an SSL Certificate
- Formulate a Password Policy

Step 4: Get Your Database Ready (pg. 8-10)

- Get the Database Installed
- Configure your Program Structure
- Create User Accounts
- Configure your Drop-down Lists

Step 5: Get Your Staff Ready (pg. 10)

- Get Your Staff Trained

Phase III: Keeping It Running

Step 1: Collect Accurate and Meaningful Data (pg. 11)

- Identify Minimum Data Requirements
- Establish Common Terms and Definitions
- Update Your Data Regularly

Step 2: Check Your Data (pg. 12)

- Schedule Routine Data Entry Checks
- Schedule Routine Reports

Step 3: Protect Your Data (pg. 12)

- Schedule Regular Data Back-ups and Test Restores

Step 4: Define a Support Strategy (pg. 12-13)

- Define a Support Strategy and Identify Designated Contacts