iPlan Technical FAQ

Typical questions and responses when explaining iPlan software to technical stakeholders

Environment & Security question summary

- Where does iPlan live?

- What level of availability do you guarantee?

- What is your backup process?

- 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?

- If we opt for on premise hosting, please specify infrastructure requirements?

- To set it up I need to have a server or it is set up in the cloud? What is the cost of this?

- Are there any costs to setting it up on our standard pc's?

- How does your platform segregate access to data based on data value or user roles?

- Describe how your solution implements or supports data deletion, forensics, right to be forgotten.

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 is your back up process?*

A. We 24 hr frequency, back ups are kept for 30 days, so worse case is a possible loss of 24hrs data

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

We include specific GDPR schedule in all of our software product licence agreements

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 service desk provides 24/7 phone support

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

A. Via our inhouse service desk

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 3years?

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 service desk 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

Q. If we opt for on premise, please describe infrastructure requirements

iPlan Server Specification 21/05/2020
When hosting iPlan on premise we recommend that two environments be provisioned, one for TEST and one for LIVE (PRODUCTION).

We recommend the following server specifications as a minimum for the LIVE environment. Note that iPlan can be hosted on a shared environment if required.

Webserver

Software

Windows Server 2012 R2 (or later)
Web Server Role
IIS 8.5 (or later)
.Net Extensibility 4.6
ASP .NET 4.6
.Net Framework 3.5 Features
.Net Framework 3.5 Including .Net 2.0 and 3.0)
Message Queue Services
Multicasting Support
SMPT (can use DBMail if SMTP is not available)

Hardware

OS Disk: 128GB
Data Disk: 32 GB
CPU: Intel Xeon E5-2660 @ 2.20 GHz (4 vCPUs)
RAM: 14GB

Database Server

Software

Windows Server 2012 R2 (or later)
SQL Server 2012 SP3 (or later)

Hardware

OS Disk: 128GB
Data Disk: 250 GB
CPU: Intel Xeon E5-2660 @ 2.20 GHz (4 vCPUs)
RAM: 14GB

Other Software Required
SQL Server Management Studio
SSL Certificate for the Web Server

Accounts
Service Account to run iPlan. Note this account will need to be able to login to the SQL database. Alternatively, we can use SQL logins if required
SMTP Account or DBMail Account details

Databases
The following databases are required:
IAMTech-iPlan
iPlan master data
IAMTech-Norms
Estimation / norm master data
IAMTech-Accounts
User account information
IAMTech-Completions
(optional) the quality assurance for shutdowns database

Web Applications
- IAMTech-iPlan
  - The main web application
  - End-users will need to be able to connect to the web server with a browser.
  - We typically deploy iPlan onto using HTTPS on port 443, along with an SSL cert.
  - It would also work with HTTP (no SSL) on standard port 80, or anything else of your choosing

- IAMTech-iPlanMobile
  - Mobile application for in the field data capture
- IAMTech-Accounts
  - Authentication and password resets
- IAMTech-Norms
  - Norms and factors used to create estimates
- IAMTech-Completions
  - (optional) the quality assurance system

Windows Services
Please Note these would be installed on the web server but can be installed on another server providing (a) they can connect to the database(s) and (b) the web applications can upload to a shared folder location which the services can access;
- File Watcher
- Importer
- Database Watcher (optional if MSMQ is not available)
- Work Pack Builder
- Exporter (optional: if exchanging files automatically with other systems)

Q. To set it up I need to have a server, or it is set up in the cloud? & What is the cost of this?

A. iPlan is Software as a service (SAAS) – so lives in the cloud, as long as you can access the internet, you can securely use iPlanSTO. The cost is included in the site licence price!

Q. Are there any costs to setting it up on our standard pc's?

A. No, iPlan does not require specialist computers.

Q. How does your platform segregate access to data based on data value or user roles?

A. Roles and Features within iPlan decide what areas of the solution are accessible. Features control what users can see, edit or delete, and these features are assigned to Roles. A Role is then assigned to the user. These can be updated via the admin screen. There are also other configuration options to limit a user, such as sites, and clients.

Q. How does your solution implement or support data deletion?

A. Most things in iPlan are Soft deleted, but if needed data can be deleted manually and permanently. Only a person with access to the server can see the soft deleted data.

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?

A. No, all the benefits of iPlan mobile come inclusive within you iPlan 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 licence charge?

A. Everything -In the one agreed sum, you will get your licence, 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?

- For any data stored offline, in iPlan Mobile, is the data stored encrypted? If encrypted, how are the encryption keys managed and stored? Can the offline data be wiped remotely?

- How are data integrations monitored & debugged, and how are exceptions alerted?

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
Oracle EAM

Your own bespoke EIS!

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 query filters 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

Q. Is the offline data encrypted & if so, how are the encryption keys managed and stored? Can the offline data be wiped remotely?

A. No, it is not Encrypted, and can not be wiped remotely.

Q. Describe how data integrations are monitored, debugged, and how exceptions are alerted.

A. Throughout the different parts of the system, such as end points and services, iPlan logs what it is doing such as calculating or saving. If there is an exception within the system it is both logged to the log file for that system, and if the area is user facing a message will be shown to the user.

For integration via the importer a file history is proved to show what section of the file have failed.