penelope
client information/
case management software

PENELOPE
DEPLOYMENT
FULL CONFIGURATION
PATHWAYS
"We’re with the right people.

I’m in partnership now with somebody who can actually help me work out what it is that I’m doing with the system, and that was really important for me."

Judith Cross,
Relationships Australia South Australia

Penelope is a powerful, integrated case management solution that can help transform the way your organization engages with clients, works collaboratively, demonstrates outcomes, and delivers quality, best practice services.

To achieve the most impact, Penelope is delivered as part of a suite of comprehensive end-to-end solutions designed to provide maximum benefit to your organization during all stages of your transformational journey.

Our Global Services team has developed a range of deployment options to meet the specific implementation, project management, configuration, and change management requirements of your organization.

Our Pathways approach offers best-in-class deployment methodologies delivered by passionate industry experts with in-depth knowledge of the social services sector. This combination of rigour and knowledge consistently delivers on meeting benefits realization objectives for the enterprise.
We recognize the profound role that Penelope can play in the social service enterprise - it really does become the engine at the heart of the business.

Embedding Penelope into the enterprise is not primarily an I.T. project but rather a business change project, and so it’s essential that your deployment is shaped around the impact upon the business and informed by deep industry knowledge.

Our experienced Penelope deployment professionals deliver implementation Pathways with a commitment that acknowledges the importance and interdependent nature of both project management and change management in order to generate maximum, consistent, and sustainable benefits for your enterprise.

Our Pathways:
- Knowledge Transfer Pathways (KT 1, 2, 3)
- Full Configuration Pathways (FC 1, 2, 3)
- Managed Service Pathway
- Benefits Realization Research
- Engage Pathway
- Health Checks / Configuration Reviews

This document focuses on the FULL CONFIGURATION PATHWAYS - information on the other Pathways is available on our website.
Every organization is different, with a different mix of available resources and skills, priorities and preferences, and varying degrees of readiness. We have designed our deployment options to present the broadest range of options for your organization’s requirements.

Each Pathway offers a different style of working together designed to match the requirements of your organization.

For the **Knowledge Transfer Pathways**, we can scale our involvement to the minimum number of steps to ensure a quality outcome for you. For larger budgets, our involvement can be greater, supporting your implementation with more involvement and additional services. The knowledge transfer approach delivers a lower overall cost of ownership by positioning your organization to be independent and self-sufficient at the end of the project.

With the **Full Configuration** option, Athena Software designs and configures your solution according to your business requirements, reducing the amount of effort your organization needs to put into the project.

**Managed Services** take this to the next level, where our team becomes an important and valued part of your team.
The Full Configuration Pathway offers a range of services, from relatively lower assistance options that require more involvement from your organization, to one that provides much more access to Penelope deployment specialists and services. Within this range, you can choose the level of involvement and effort provided by your staff and by Athena.

We work with your organization to understand and document your business requirements and objectives and then perform the configuration work required.

There is representative involvement from your team to inform business requirements, undertake testing, and support rollout activities to the broader organization.

The Full Configuration approach delivers a configured Penelope based on understanding your requirements. This approach means there are less knowledge transfer components, so you may wish to plan for additional Penelope professional services at a later date.
The Full Configuration Pathway 1 is led and project-managed by your agency, with minimal involvement from Athena’s deployment team. It features a relatively low up-front cost and your configuration is fast tracked by experienced and knowledgeable Athena staff. With this pathway, Athena takes responsibility for system configuration and your agency takes responsibility for the change management and training aspects of deployment.

- Pricing for this Pathway starts at $8,000, plus an additional $4,000 per substantively different service to be configured (i.e. a wholly different set of funding, intake, and service delivery characteristics)

- Initial implementation timeframes for a small organization with less than five different service modalities is about two to three months

**Additional options:**

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<thead>
<tr>
<th>ACTION TRIGGER CONFIGURATION</th>
<th>STANDARD REPORTS TRAINING</th>
<th>DOCUMENT BUILDING</th>
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<td>ENGEAGE CONFIGURATION</td>
<td>NDIS TRAINING</td>
<td>FINANCIAL PACKAGE EXPORT</td>
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**FC 1 includes:**

- PROJECT CHARTER
- PROJECT PLAN
- BUSINESS UNDERSTANDING SESSION
- BUSINESS PROCESS UNDERSTANDING BY SERVICE
- BASIC PENELope CONFIGURATION PER SERVICE INCLUDING SECURITY CLASS SETUP
- INITIAL USER SETUP
- SYSTEM TESTING AND REFINEMENTS
- LIMITED PROJECT MANAGEMENT
- PENELope ONLINE END USER TRAINING
- SERVICE MANUAL DEVELOPMENT AND TRAINING
- WORKING WITH TECHNICAL SUPPORT WORKSHOP

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The Full Configuration Pathway 2 is led and project managed by your agency with a higher level of involvement from Athena’s deployment services team. With FC2, Athena digs deeper into an analysis of your business processes, and your configuration is fast-tracked by experienced and knowledgeable Athena staff.

- Pricing for this Pathway starts at $18,000, plus an additional $8,000 per substantively different service to be configured (i.e. a wholly different set of funding, intake, and service delivery characteristics)

- Initial implementation timeframes for a small organization with less than five different service modalities is about two to three months, and about three to six months for six to 15 substantially distinct service modalities

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<tr>
<th>Action Trigger Configuration</th>
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<td>Credit Card Configuration</td>
<td>Automated Data Migration</td>
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<td>External Comm (Email/Sms)</td>
<td>DEX/DSS Training</td>
<td>Custom Reports</td>
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<td>ORS/SRS Training</td>
<td>Complex Billing Structures</td>
<td>Custom Interfaces</td>
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<tr>
<td>Engage Configuration</td>
<td>NDIS Training</td>
<td>Financial Package Export</td>
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</table>

### FC 2 includes:

- Project Charter
- Project Plan
- Project Management Support
- Project Kick-Off
- Product Awareness Training
- ‘To Be’ Business Process Design Workshops Including Development of Subsequent Documentation
- Synthesis of Configuration Requirements
- Development of the Configuration Design Workbook (Including Clarification With Client)
- Security Design
- Configuration of Penelope
- System Test of Penelope
- Data Migration Planning
- Service Manual Development
- Recommendations for Change Management (Includes Communication Templates)
- Penelope Online End User Training
- End User Service Manual Training
- Go Live Support
- Working with Technical Support Workshop
The Full Configuration Pathway 3 is project-managed by Athena’s deployment team, and provides even more resources and service components.

- Pricing for this Pathway starts at $40,000, plus an additional $10,000 per substantively different service to be configured
- Initial implementation timeframes for a mid-sized organization with less than 6-15 different service modalities is about 3-6 months, and about 6-8 months for larger agencies with more than 5 substantially distinct service modalities

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<td>Action</td>
<td>ENGAGE</td>
<td>Standard Reports Training</td>
<td>Document Building</td>
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### FC 3 includes:

- **PROJECT CHARTER**
- **PROJECT PLAN**
- **PROJECT MANAGEMENT**
- **PROJECT ISSUE MANAGEMENT**
- **PROJECT KICK-OFF**
- **PRODUCT AWARENESS TRAINING**
- **‘TO BE’ BUSINESS PROCESS DESIGN WORKSHOPS INCLUDING DEVELOPMENT OF SUBSEQUENT DOCUMENTATION**
- **SYNTHESIS OF CONFIGURATION REQUIREMENTS**
- **DEVELOPMENT OF THE CONFIGURATION DESIGN WORKBOOK (INCLUDING CLARIFICATION WITH CLIENT)**
- **SECURITY DESIGN**
- **CONFIGURATION OF PENELOPE**
- **QUALITY REVIEW OF CONFIGURATION**
- **QUALITY REVIEW POST-CONFIGURATION CONFIRMATION**
- **SYSTEM TEST OF PENELOPE**
- **QUALITY REVIEW POST-CONFIGURATION CONFIRMATION**
- **POST-IMPLEMENTATION REVIEW WORKSHOP**
- **RECOMMENDATIONS FOR CHANGE MANAGEMENT (INCLUDES COMMUNICATION TEMPLATES)**
- **PENELOPE ONLINE END USER TRAINING**
- **END USER SERVICE MANUAL TRAINING**
- **GO LIVE SUPPORT**
- **WORKING WITH TECHNICAL SUPPORT WORKSHOP**
- **DATA MIGRATION PLANNING**
- **ENGINEERING CONFIGURATION**
- **CREDIT CARD CONFIGURATION**
- **STANDARD REPORTS TRAINING**
- **ORS/SRS TRAINING**
- **CUSTOM REPORTS**
- **AUTOMATED DATA MIGRATION**
- **CUSTOM INTERFACES**
- **DOCUMENT BUILDING**
- **DSS TRAINING**
- **COMPLEX BILLING STRUCTURES**
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The Full Configuration Pathway 4 is project-managed by Athena, providing even more resources and service components, including a Board Business Case and Benefits Realization research.

- Pricing for this Pathway starts at $58,000, plus an additional $10,000 per substantively different service to be configured (i.e. a wholly different set of funding, intake, and service delivery characteristics)

- Initial implementation timeframes for a mid-sized organization with less than 6-15 different service modalities is about 3-6 months, and about 6-8 months for larger agencies with more than 5 substantially distinct service modalities

### FC 4 includes:

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<tr>
<th>PROJECT CHARTER</th>
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<td>DEVELOPMENT OF THE CONFIGURATION DESIGN WORKBOOK (INCLUDING CLARIFICATION WITH CLIENT)</td>
<td>DEVELOPMENT OF A BOARD BUSINESS CASE WITH RESEARCH-BASED BUSINESS BENEFITS REALIZATION PLAN</td>
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<td>RECOMMENDATIONS AND SUPPORT THROUGH CONFIGURATION CONFIRMATION</td>
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**ATHENA SOFTWARE**

**FC PATHWAYS**
Tailored Services for you.

As flexible as Penelope is, there may be times where some additional connective work is needed to bridge a unique gap between our software and other information systems (e.g. Finance, HR, government reporting bodies) or legacy data.

We can also add significant value by creating custom reporting dashboards, web service integrations to sync or securely share data with third-party systems, or by extending the benefits of Penelope for your organization through bespoke application customization. Sometimes all that’s needed is some help building out or configuring the system.

Our multi-disciplinary Tailored Services team is well-equipped to provide creative solutions for your unique requirements.

We also work with an experienced integration partner to provide cloud-based, real-time multi-point integration services with data transformation, data enrichment, and multiple end points.
Our Approach.

Penelope provides enormous potential to automate day-to-day activities, improve efficiency, and support future growth.

It’s important to recognize that the kinds of substantial, far-reaching change that transitioning to a comprehensive client information system like Penelope introduces should be managed with foresight, planning, and experience, and with proven methodologies.

We work collaboratively with you to design the project to meet your specific requirements, values, and preferences. Services can be tailored according to the Business Analysis / I.T. skill levels within your organization.

The first thing to decide upon is your general approach: Do you want a Knowledge Transfer approach, a Full Configuration approach or a Managed Service approach?

Each includes a certain degree of involvement and resourcing from your organization, as well as differing levels of involvement from Athena. Within each of these three approaches, there are variations to suit your specific needs.

Our overall objective is to set you up for success with Penelope and ensure that your enterprise realizes maximum benefit from your investment in Penelope.

Staged Success.
glossary of terms.

PROJECT CHARTER
A document that specifies all the components of a project that are in scope, how the project will be performed, who is involved in the project and their roles and responsibilities, the risks to be managed within a project by your organization and Athena Software, the costs of the project, and project plan.

KNOWLEDGE TRANSFER APPROACH
A Penelope deployment methodology designed to develop organizations who are independent and self-sufficient post ‘go-live.’

PRODUCT AWARENESS TRAINING
Training provided by Athena Software to the Client Project Team on the full features and functionality of Penelope, so your organization’s Project Team has a solid understanding of its capabilities to inform ‘To Be’ Business Process Design for each of the your services in the scope of the Implementation Project.

DATA MIGRATION PLANNING
Workshop to agree how your organization will approach data migration (manual or automated), map out what will be required, how data migration will occur, and who will undertake data migration and when, with alignment to testing and go-live activities.

DATABASE SCHEMA TRAINING
A training course to teach your organization’s Reporting Specialists on Penelope’s Entity Relationship Diagram (ERD), and how to use an Open Database Connectivity (ODBC) connection, as well as create new data views for reporting.

‘TO BE’ BUSINESS PROCESS DESIGN
Designing how your agency will use Penelope to support your end-to-end business processes by service. These sessions consider how clients come into service, how service is delivered, and how clients are discharged. The workshop will look at who has access to information regarding clients in this service, and will cover reporting requirements from the funder, operational, and practitioner perspectives, and what data needs to be collected to inform those reports.

CONFIGURATION DESIGN WORKBOOK
A workbook that lists all the elements of Penelope to be configured and which is populated with your organization’s configuration requirements based on the data, process and reporting requirements identified via the ‘To Be’ Business Process Design sessions.

SYSTEM TESTING
Your organization’s Project Team testing the configuration of the system according to the ‘To Be’ Business Process Designs by service.

CONFIGURATION CONFIRMATION
The Program Reference Team testing the configuration of the system according to the ‘To Be’ Business Process Designs by service.

SERVICE MANUALS
Service-specific manuals that describe how a specific service uses Penelope.

SERVICE MANUAL TRAINING
Face-to-face workshops delivered to end users by service to explain how their specific service uses Penelope. For KT approaches, this is delivered by the Client Project Team.

SANDBOX
A Penelope environment for configuring Penelope, testing and training end users.

CONFIGURATION TRAINING
Training in how to configure Penelope in the System Administrator account, and with Administrator privileges within Penelope.

SECURITY DESIGN WORKSHOP
Training in how the standard security classes work and how to configure unique security classes for your organization as required.

PROJECT KICK-OFF
A workshop conducted at the beginning of the project to ensure that the Project Team, Project Steering Committee, Project Sponsor, and Program Reference Team all understand the essential elements of the Project Charter (i.e. scope, how the project will be performed, who is involved in the project, and their roles and responsibilities, the risks to be managed within a project by your organization and Athena Software, and the detailed project plan), as well as the importance of change management to ensure the success of the project.

TECHNICAL SUPPORT WORKSHOP
A workshop delivered by the Customer Success team to educate your organization’s Client Project Team on how to make the most of the Penelope Help Site, and how to log support tickets.

POST GO-LIVE SUPPORT
Intensive support provided to end users in the first few weeks after Go-Live.

POST IMPLEMENTATION REVIEW
A workshop with your organization’s Project Sponsor, Client Project Team and Athena Project Manager and Team to discuss the project, and to put in place next steps to ensure that your organization realizes the benefits from your investment in Penelope.
NOTE: Information provided is subject to change without notice. Please contact us for the most up-to-date information available.