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TAPRII
TECHNICAL ASSISTANCE
FOR POLICY REFORM

EGYPTIAN INSURANCE SUPERVISORY AUTHORITY

IT PROJECT UPDATE

NOVEMBE 23, 2006

This publication was produced for review by the United States Agency for International Development. It was prepared by William Zuellig of BearingPoint, Inc.

EGYPTIAN INSURANCE SUPERVISORY AUTHORITY

IT PROJECT UPATE

TECHNICAL ASSISTANCE FOR POLICY REFORM II

CONTRACT NUMBER: 263-C-00-05-00063-00

BEARINGPOINT, INC.

USAID/EGYPT POLICY AND PRIVATE SECTOR OFFICE

NOVEMBER 23, 2006

WILLIAM ZUELLIG:

COMPONENT B

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1.0 INTRODUCTION

The objective of this report is to report on project activities, and to update the project plan for the ongoing Egyptian Insurance Authority Supervisory (EISA) IT implementation. The project plan updates the plan originally defined in the IT Assessment of March 2, 2006.

1.1 SCOPE AND PURPOSE

The scope of this 3 week activity is to oversee the current project, and to develop and implement an updated plan to complete the various sub-phases of the IT portions of the overall EISA project.

The purpose of this task and the resulting update to the project plan are to:

- Review the current progress against the original plan
- Make updates and corrections to the overall EISA IT implementation plan
- Identify problems and issues and recommend solutions to the problems and issues
- Recommend future ex-pat oversight and assistance visits

All of these are being made to ensure that the project moves forward and that progress against the defined milestones are being made.

1.2 BACKGROUND

EISA is modernizing its supervisory procedures. IT has become one of the very few regulatory bodies in the region that has achieved 100% electronic filing for insurance companies' financial information. In this regard, EISA issued Decree 621/2001 to mandate that insurance companies submit their financial statements in electronic format. Furthermore, EISA launched its public website, which provides information about the Egyptian insurance law and their annual statistical report. Most of the insurance companies are linked to EISA via an electronic wide area network (WAN).

Under a prior USAID activity, Reforming Insurance Markets (RIM), starting on September 1, 1992 and ending on April 15, 2001, the following was achieved in IT:

- Completed Phase I of a data management system automation. Phase I included the creating and implementation of an automated Insurance Supervision Information System (ISIS, through which off-site examination procedures were computerized. EISA is extensively using this system in examining insurance companies.

A follow-on USAID activity, Modernizing Egyptian Insurance Supervision (MEIS) started on January 20, 2002 and ended on April 15, 2003. The IT achievements were:

- Completed Phase II of automating of EISA's data management system. Phase II included enhancements to the existing ISIS (e.g., added Reinsurance and Intermediary data) and implementation of a new document management system including advanced image processing techniques. The new document management system allows EISA to do very basic archiving and accessing of electronically data previously maintained only in paper media.

The current TAPR-II project continues the modernization of EISA's functional departments and IT infrastructure.

EISA, BearingPoint, and hardware and software vendors have been working on project tasks since February 2006. BearingPoint IT Advisors (Jonathon Tomar and William Zuellig) as well as local BearingPoint IT personnel (Ismail Zidan, Ahmed Mostafa, Mohamed Hamid) have been involved in:

- Developing IT strategies and project plans
- Developing detailed specifications for hardware, networking and specialized software
- Procuring infrastructure and software
- Assisting EISA in providing facilities upgrades for net IT equipment
- Assisting EISA in planning and installation of equipment
- Developing a new Web portal
- Project management

One major change to this updated plan compared to the one developed in March 2006 is the simplification of the Web Portal development activities. This Web development portion of the plan now corresponds more closely to the detailed plan developed by BearingPoint in August 2006.

The other major change is the moving out in time of many of the activities.

2.0 PROJECT STATUS

2.1 OVERALL SCHEDULE

The activities identified in the March 2, 2006 IT Strategic Plan, to be performed under TAPR-II, with the original and revised schedules are shown in Table 1. The original plan is shown with "x's". The revised, current schedule is shown with "c's".

Table 1: Overall Project Schedule

x is original schedule; c is current schedule

	F e b 2 0 0 6	M a r	A p r	M a y	J u n e	J u l y	A u g	S e p t	A u g	O c t	N o v	D e c	J a n 2 0 0 7	F e b	M a r	A p r	M a y	J u n e	After 18 months
Improvements to Existing Systems including New Pension Funds System	x c	x c	x c	c	c	c													
IT Infrastructure, Procurement of New Equipment and Software, and Email	x	x c	x c	x c	x c	x c	x c	x c	x c	x c	c	c	c	c					
Data Sharing	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Government Fund		x	x	x	x	x													
EISA Web Portal Development		x	x	x	x	x	x	x	x	x	x	c	c	c	C	c			
Document Management & Scanning System				x	x	x	x	x	x	x	c	c	c	c	C	c			
Management Reporting		x	x	x	x	x	x	x	x	x									
IT Technical Training			x	x	x	x	x												

Table 2: Milestones, Schedules, and Responsibilities
Reschedules are in bold. Completion of tasks is a “C”

Task or Milestone	Start Date	Completion Date	Responsible Organization
Procurement and Installation of Infrastructure, and Training	March 24, 2006	March 9, 2007	
<ul style="list-style-type: none"> Write and Submit USAID 548 ADS IRM Request 	C - March 27, 2006	April 7, 2006	BearingPoint
<ul style="list-style-type: none"> Receive IRM Approval 	C - April 10, 2006	April 17, 2006	BearingPoint
<ul style="list-style-type: none"> Write and Issue RFP's for Equipment and Training 	C - April 8, 2006	April 21, 2006	BearingPoint
<ul style="list-style-type: none"> Evaluate, select winning vendor, and obtain CTO and CO Approvals 	C - May 29, 2006	August 20, 2006	BearingPoint
<ul style="list-style-type: none"> Prepare site and offices for hardware delivery and installation 	Oct 19, 2006	Nov 30, 2006	EISA, BearingPoint
<ul style="list-style-type: none"> Hire four new personnel as: experienced web developer, junior web developer, programmer/analyst, and document management specialist. <i>This has yet to be done and is critical for continuing the implementation of the Web Portal and Document Management</i> 	November 14, 2006 <i>In process</i>	December 31, 2007 <i>In process</i>	EISA
<ul style="list-style-type: none"> Install hardware and system software at EISA and Government Fund 	November 14, 2006	December 30, 2006	EISA, BearingPoint (hardware vendor)
<ul style="list-style-type: none"> Attend IT Professional Training Classes 	July 30, 2006 <i>In process</i>	February 14, 2007	EISA, BearingPoint (training vendor)
<ul style="list-style-type: none"> Plan & Implement Microsoft Exchange Server and Outlook 	November 11, 2007	March 12, 2007	EISA, BearingPoint
<ul style="list-style-type: none"> Attend End-User MS Office and Outlook Courses 	November 19, 2006 <i>In process</i>	March 9, 2007	EISA, BearingPoint (training vendor)
Define and Implement Security Policy	November 14, 2006	December 14, 2006	EISA and ACT with BearingPoint assistance
Define and Implement Business Continuity, Backup, and Recovery	November 14, 2006 <i>In process</i>	December 14, 2006	EISA and ACT with BearingPoint assistance
Implement Improvements to Current Systems – EISA and Government Fund	February 1, 2006 <i>In process</i>	February 28, 2007	EISA with advice from BearingPoint
Implement Data Sharing Improvements	March 20, 2006 <i>In process</i>	March 21, 2007	EISA with advice from BearingPoint
Implement Management Reporting	April 30, 2006 <i>In process</i>	April 25, 2007	EISA with advice from BearingPoint

Table 2: Milestones, Schedules, and Responsibilities
Reschedules are in bold. Completion of tasks is a “C”

Task or Milestone	Start Date	Completion Date	Responsible Organization
Design and Develop Web Portal	July 2, 2006	April 19, 2007	EISA and BearingPoint
• Systems Analysis	C – July 2, 2006	October 18, 2006	
• Systems Design	C – July 2, 2006	October 18, 2006	
• Development	December 10, 2006	April 17, 2007	
• Testing	December 10, 2006	March 11, 2007	
• Documentation	December 10, 2006	March 9, 2007	
• Pilot Installation	February 13, 2007	March 6, 2007	
• Deployment	January 8, 2007	March 21, 2007	
• Implement on New Security Hardware	October 26, 2006	April 19, 2007	EISA and BearingPoint
Plan and Implement Help Desk	December 15, 2006	February 28, 2007	EISA, BearingPoint

Table 2: Milestones, Schedules, and Responsibilities
Reschedules are in bold. Completion of tasks is a “C”

Task or Milestone	Start Date	Completion Date	Responsible Organization
Implement New Document Archiving System	May 19, 2006	April 5, 2007	
<ul style="list-style-type: none"> • Survey and Select Archiving Software 	C - May 19, 2006	August 27, 2006	BearingPoint
<ul style="list-style-type: none"> • Write and Issue RFP for Software 	C- August 28, 2006	September 18, 2006	BearingPoint
<ul style="list-style-type: none"> • Evaluate Proposals, Get CTO Approval, Order Software 	October 19, 2006 <i>In process</i>	December 16, 2006	BearingPoint
<ul style="list-style-type: none"> • Hire New Document Management Specialist 	November 20, 2006	December 31, 2006	EISA
<ul style="list-style-type: none"> • Provide Training on Archiving Software and Customize software 	February 12, 2007	March 14, 2007	Provided by BearingPoint vendor, for and with EISA IT Personnel
<ul style="list-style-type: none"> • Develop Detailed Migration and Installation Planning 	December 1, 2006	December 15, 2006	EISA and BearingPoint
<ul style="list-style-type: none"> • Develop and Test Procedures for Migrating Current Document Archives to New System 	February 1, 2007	February 28, 2007	EISA and vendor
<ul style="list-style-type: none"> • Develop Operational Procedures and Implement Document Naming Standards and Security Rules 	February 12, 2007	March 14, 2007	EISA, vendor, and BearingPoint
<ul style="list-style-type: none"> • Conduct End-User Training 	March 7, 2007	March 29, 2007	EISA and vendor
<ul style="list-style-type: none"> • Write New and Update Existing Retrieval Programs for Multiple Document Displays 	March 7, 2007	March 29, 2007	Vendor and EISA EISA
<ul style="list-style-type: none"> • Migrate Old Archives and Start Production 	March 29, 2007	April 5, 2007	EISA

Table 2: Milestones, Schedules, and Responsibilities
Reschedules are in bold. Completion of tasks is a “C”

Task or Milestone	Start Date	Completion Date	Responsible Organization
Implement Workflow	November 25, 2006	November 15, 2007	
<ul style="list-style-type: none"> Develop Requirements and ensure these match the software selected for document management 	March 1, 2007	March 28, 2007	EISA and BearingPoint
<ul style="list-style-type: none"> Survey Marketplace and Recommend Software Solution(s) (this is part of the document management software solution) 	C- March 29, 2006	August 27, 2006	BearingPoint
<ul style="list-style-type: none"> Write and Issue RFP (completed in 2006 with Document Management RFP) and revise as necessary 	C - August 28, 2006	September 18, 2006	BearingPoint
<ul style="list-style-type: none"> Get CTO Approval, Order Software 	April 16, 2007	May 5, 2007	BearingPoint
<ul style="list-style-type: none"> Provide Training on Workflow Software 	May 20, 2007	May 24, 2007	EISA, BearingPoint (training vendor)
<ul style="list-style-type: none"> Select Business Process, Re-engineer if needed, and Define/Design as Pilot Workflow 	May 6, 2007	July 5, 2007	EISA, BearingPoint (software vendor)
<ul style="list-style-type: none"> Customize Software for Pilot Workflow 	July 8, 2007	August 26, 2007	EISA, Software Vendor
<ul style="list-style-type: none"> Test and Refine Workflow 	August 29, 2007	September 20, 2007	EISA, Software Vendor
<ul style="list-style-type: none"> Develop End-User Documentation 	September 9, 2007	October 4, 2007	EISA, Software Vendor, BearingPoint
<ul style="list-style-type: none"> Train End-Users 	October 7, 2007	October 25, 2007	EISA
<ul style="list-style-type: none"> Implement Pilot Workflow 	October 28, 2007	November 15, 2007	EISA, Software Vendor
<ul style="list-style-type: none"> Expand to New Workflows 	November 18, 2007	Ongoing	EISA

2.2 OVERALL PROGRESS AND DELIVERABLES

Tables 1 and 2 identified a number of activities, milestones and deliverables that have been planned, completed or are in progress.

In general, the original schedule of tasks and deliverables developed in the IT Assessment Report of March 2, 2006 is running approximately 5 months behind schedule. While some tasks have been completed close to that schedule, several on the critical path have been delayed, thus moving all subsequent tasks to later dates.

2.2.1 Completed Activities

Those activities that have been or will soon be completed for the most part are related to procurements for hardware and infrastructure. It is very important that this infrastructure get installed because it is a prerequisite for the remaining activities such as developing the new Web portal and the implementation of a new document management system. The activities that have been completed are:

- Procurement of the IT equipment and systems software.
- Site preparation and facilities upgrades at EISA so that the IT equipment can be installed.
- Planning for the installation and configuration of the IT equipment (in progress).
- Start of IT equipment installation.
- Procurement of IT technical training.
- Beginning of and completion of approximately 60% of the IT training to date, including the critical courses necessary to install the IT equipment.
- Procurement of the End-User Training for Microsoft Office and Outlook.
- Beginning of the End-User training courses on November 19, 2006.
- Completion of vendor evaluation and vendor selection for the new document management system (DMS).

2.2.2 Activities to Start within 30 days

The activities that will start within the next 30 days include:

- Detail planning for the new DMS system installation.
- Secure USAID approval and order the DMS software.
- Completion of the IT infrastructure installation.
- Onsite assistance from BearingPoint IT Advisor to ensure the hardware installation and configuration is done properly and completed.
- Installation of new high speed Internet connection.

2.2.3 Ongoing and Delayed Activities

The activities that are ongoing, but whose completions are being rescheduled to later time periods are:

- Continuation of the Web Portal development utilizing additional BearingPoint developer resources.
- End user training for Microsoft Office and Microsoft Outlook.

- Implementation of Microsoft Outlook email system.
- DMS installation.
- Workflow procurement, planning, and implementation.

2.2.4 Reasons for Delays

Most of the delays that have resulted in these reschedules can be attributed to three issues:

- Delays in EISA's hiring and retaining IT employees. Since the IT Assessment was completed in March 2, 2006, three IT personnel have quit. At the time the Assessment was done, it was recommended that the then current staff be supplemented with an additional 2 or 3 people, of which one has been hired. The net result is that today the IT department is short by at least 4 people. The critical needs are for an experienced Web developer; a second more junior web developer; a document management technical specialist; and a traditional programmer/analyst. This lack of resources has been an ongoing problem.
- BearingPoint delays in committing sufficient resources to the web portal development efforts. The identified BearingPoint resource has been assigned at times to other higher priority TAPR-II tasks. This is prevented him from committing the planned 60% of his time to the EISA development efforts. However, EISA did not have a web developer to work with the BearingPoint person, so even had the BearingPoint person been available, certain activities still would have been delayed due to EISA's lack of a counterpart resource. This issue has very recently addressed with the approval by USAID for BearingPoint to hire a new web developer.
- Delays caused by EISA not being ready to take delivery of the IT equipment. This delay was due to EISA's not having a secure storage area to stage the equipment, and not having completed the site and facilities preparations in time to take delivery of the equipment. This particular issue has now been resolved.

2.3 WEB PORTAL DEVELOPMENT

As indicated above, development of the Web portal has been delayed due primarily to a lack of resources in EISA. EISA has tried to hire a web developer; at one point they did hire one, but that person soon quit. The development of the portal requires that an EISA IT resource be assigned to the project during the development and installation portions so that system's knowledge is transferred to EISA.

BearingPoint has continued to progress in defining the business and systems requirements, and in designing the overall system including the initial web pages. This effort has been delayed not only due to lack of an EISA participatory resource, but also a lack of BearingPoint resources. Very recently the request for a new BearingPoint web developer was approved by USAID, and by mid-December this person will be provide a substantial amount of his/her time to work on the EISA Web portal development.

EISA is still expected to hire and retain an experienced Web developer to work with the BearingPoint developer. BearingPoint can continue to complete some design and

development work, but EISA needs to provide a person who can learn the system through participation in its development.

Alternative plans on how to continue the Web portal development in the absence of an EISA developer are being discussed and will be addressed later sections of this report.

2.4 DOCUMENT MANAGEMENT

The document management Request for Proposal has been issued, vendors have submitted proposals, the proposals have been evaluated, references have been checked, and a preliminary selection of a winning vendor has been made.

BearingPoint conducted a review of the two finalists with EISA to get their concurrence. The next steps are to review and seek approval from EISA, seek USAID approval to procure, and then issue the purchase order. It is expected that the software will be delivered and vendor customization and training will start in February, 2007. We do not expect it to start until EISA hires or otherwise contracts for an IT document management specialist.

Prior to February 2007, BearingPoint IT Advisors will develop a detailed installation and implementation plan for the document management system.

The selected document management system offers as an optional module, integrated Workflow module that can be purchased, installed, and integrated at a later date. The procurement of the workflow module is not being made at this time because the commitment to workflow in terms of a firm timeline and resources has not been made. To purchase this module now could potentially be a waste of funding, depending on a reassessment of priorities once the Web portal and the new document management system are installed.

2.5 TRAINING

2.5.1 IT Training

IT training has been ongoing since July 29, 2006. The courses attended by EISA IT personnel and completed to date are listed below. These all are critical for the installation of the hardware, operating system, and security.

- Cisco Introduction to Network
- Cisco Securing IOS Networks
- Cisco PIX Installation
- Cisco Intrusion Prevention System
- Microsoft Implementing MS Windows Server 2003 Operating and Infrastructure Essentials
- Microsoft Managing and Maintaining a Windows Server 2003 Environment
- Microsoft Designing Server 2003 Active Microsoft Implementing Exchange Server
- Microsoft Deploying ISA Server (in progress)

The technical training that has not yet been started primarily because Web developers and programmer/analysts have not yet been hired is:

- Microsoft Visual Studio.NET Introduction for Developers

- Microsoft Developing .NET Applications for Windows
- Microsoft Developing ASP.NET Web Applications
- Microsoft Programming SQL Server Database

BearingPoint has contracted to pay for these courses. In the event that EISA cannot hire sufficient personnel to use up all of these development courses, the training vendor has agreed to allow selection of alternate courses for the other EISA IT personnel.

In addition, there are several project management courses that are yet to be attended by the General Manager of IT, Mrs. Nasr. These are:

- Microsoft Project Levels 1 and 2
- Strategic Planning for IT

These courses are scheduled for February, 2007.

2.5.2 End-User Training

End-user training began November 19, with the first of the Windows XP, Introduction to Personal Computers, and Microsoft Word Level 1 courses. Approximately 190 EISA end-users will be attending various Microsoft Word, Excel, PowerPoint, and Outlook (email) courses from mid-November 2006 to early March, 2007. Table 3 shows the planned schedule for all end-user courses.

Table 3: Schedule Of Classes for End-Users

	Nov 2006	Dec	Jan 2007	Feb	Mar		
Microsoft Windows XP and Word Level 1 and 2	6 classes of Level 1	3 classes of Level 1 and 11 classes of Level 1					
Microsoft Windows XP and Word Level 3				1 class			
Microsoft XP Excel Levels 1 and 2			9 classes of Level 1 and 11 classes of Level 2				
Microsoft XP Excel Level 3				1 class			
Microsoft Exchange Email - Outlook Levels 1 and 2				12 classes			

Microsoft PowerPoint Levels 1 and 2						6 classes		
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The Windows XP, PC Introduction, and Word courses are timed to coincide with the installation of the new PC's, and the re-imaging of the existing PC's with MS Office 2003. The Outlook courses are scheduled to coincide closely with the implementation of MS Exchange Server.

2.6 WORKFLOW

The workflow application will start after the document system is installed and running successfully throughout EISA. One of the requirements of the document management RFP was that the software providers must have an integrated workflow module that can easily be integrated with the document management system.

The software selected for document management does have this workflow capability. The module is not being purchased now because it is not know with precision if and when the workflow application will be started. However, when that time comes, the workflow module and associated training can be procured.

3.0 ISSUES

3.1.1 IT Personnel

The primary issue has been the problem EISA has in hiring and retaining existing and new IT personnel. Since the IT Assessment was completed in March, 2006 three EISA IT personnel have quit. Although EISA has hired one network engineer as a replacement, EISA today is still short four IT personnel.

There are numerous reasons for this problem, including low salaries, poor physical working environment, and lack of proper delegation and management of tasks among the IT staff.

The Chairman of EISA is aware of these problems, and has recently agreed to increase the salary and bonus structure for junior IT personnel. However, at the current time, at least two of the four open IT positions require people with experience beyond a junior status. EISA can continue to pursue hiring junior personnel, with the intent of providing them IT training, but this will not address the issue of experienced personnel needed to avoid further delays in the implementation of the web portal and a new document management system.

The four EISA IT open personnel slots and their experience and skills requirements are:

- Web Developer – 4 years of experience in Web and application development. Bachelors degree. Development experience using: .NET Framework, C# and/or Visual Basic; Visual Studio; MS SQL Server 2000; MS Windows 2003 Server. Working skills in English speaking and writing.
- Web Developer – 1 to 2 years of experience in Web and application development. Bachelors degree. Development experience using: .NET Framework, C# and/or Visual Basic; Visual Studio; MS SQL Server 2000; MS Windows 2003 Server. Working skills in English speaking and writing.
- Document Management Specialist - 2 years experience in implementing document management systems. Bachelors degree. Experience in MS Windows 2003 Server; .NET Framework; MS SQL Server 2000. Working skills in English speaking and writing.
- Application Developer – Bachelors degree. 1 year experience in developing applications using: MS Windows 2003 Server; MS SQL Server 2000; Visual Basic; MS Access. Working skills in English speaking and writing.

To resolve these the more junior open positions the Chairman will run an internal EISA advertisement very soon, looking for non-IT departments people, who have skills in basic computers, Word, and Excel with the intention of training them. This is a viable but lengthy solution and will not address the need for experience Web developers or document management specialists. These very junior people could attend the IT developer courses described earlier in this report and thus acquire some knowledge of modern development suites. But, they would have to be mentored by experience IT personnel.

Alternatives for IT personnel resources should include restructuring salary and bonuses so that at least one experience web developer can be hired. This should be the first priority.

An alternative is to outsource development efforts such as Web portal development and/or Document Management, including having the outsourcer place personnel at EISA for some period of time to install, implement, train, and assist in IT management. USAID has indicated that they will not provide funding for these types of traditional outsourcing activities. However, J Hambric has discussed this issue with the Chairman who has access to a

potential source of funds through the Ministry of Investment. The Ministry may be able to fund one experienced IT Web developer, either as a direct hire, or on a contract basis through a company. There are advantages and disadvantages for both hiring directly as an EISA employee, or contracting for the person through a company. Either solution can work, as long as there is good project management, and knowledge of how the system was developed is imparted to EISA. Regardless of who provides the required web developer, the project management of this effort should remain with BearingPoint so that overall continuity and oversight are ensured.

3.1.2 Web Portal

The preferred solution for Web portal development is to have an EISA developer work closely with a BearingPoint developer. As discussed in the previous subsection, it is problematic as to when EISA will have an experienced Web developer in place. We are estimating that if the Chairman can find funding, a new developer could be in place by mid-December, 2006.

Mr. Zidan has indicated that if with the new BearingPoint Web developer, and if EISA can hire a web developer, the initial portal would be ready for pre-implementation testing in 2 months. An additional 2 months would be required for thorough testing, user training and complete implementation.

However, if EISA cannot hire a person, then BearingPoint must press forward with their commitment to assist and take the lead role in developing the web portal. Actual build and test activities can be started very soon. BearingPoint has just received USAID approval for an additional local resource to work with Ismail Zidan on the continuing web portal development. This new person who should be hired by mid-December 2006, will be doing most of the "hands-on" development work with Mr. Zidan providing overall project management. In the March 2006 plan, our estimate was 60% of the BearingPoint Web developer's time would be required during the 8-9 month design and development effort.

Continuing the Web development without a counterpart EISA resource is still is not the preferred solution because without EISA's direct IT involvement in the development effort, skills and knowledge will not be transferred, leaving EISA dependent on an outside resource for any fixes, repairs, or enhancements. However, this option still should be considered in the event EISA cannot provide any new Web development resources.

Another alternative is to outsource the entire Web portal design and development work to a 3rd party. This was considered a more viable alternative prior to BearingPoint's getting approval for its new Web developer. This alternative is the least preferred, but it should not yet be discarded. It has the advantage of allowing an experienced developer and project management company do all of the work. EISA and BearingPoint's time commitment would be minimal during the actual development phases. However, it has some disadvantages, including:

- Source code may not be available from the 3rd party.
- Skills transfer to EISA to allow them to maintain and enhance the solution may be minimal and insufficient, thus requiring EISA to be continually dependent on a 3rd party for these functions.
- The cost of this alternative may be the highest of all alternatives.

- Funding for this solution has yet to be addressed. Outsourcing is unlikely to come from USAID, so EISA may have to provide it, which is unlikely.

3.1.3 Document Management

There are two open issues regarding the selection and implementation of a new document management system.

One of these has already been discussed under IT Personnel; that is the lack of a document management specialist on the EISA IT staff. This is a prerequisite to installing the new system. BearingPoint IT Advisors working with the current EISA IT staff will develop a detailed implementation plan for document management. However, this plan would be best developed by including the new document management specialist. EISA needs to hire a document management specialist with at least 2 years of implementation and installation experience.

The second issue is securing USAID approval for procuring the new software. Evaluation of proposals has been made and a vendor has been recommended as the winner. Once USAID approves this procurement, the purchase order can be issued. If for some reason USAID does not approve BearingPoint's recommended vendor, then an analysis of the reason(s) and a new plan for document management will have to be developed.

3.1.4 IT Training

IT Training is behind the original schedule, but to date this has not impacted the overall implementation. The essential IT courses needed to prepare EISA personnel for the installation of the new infrastructure have been completed. The remaining courses are primarily for newly hired IT Web developers and programmer/analysts as required.

The original IT developer set of courses was designed based on the March 2, 2006 staff. All of the IT staff in place at that time had been considered for the IT developer training; but three of these people have either quit or refused to participate in these courses. Depending on the technical backgrounds and experience of new hires, the IT developer set of courses may have to be altered. There is sufficient funding already approved by USAID so that EISA and BearingPoint have considerable latitude in defining exactly what IT developer or other IT courses will be required in the near future.

4.0 NEXT STEPS

Many of next steps including solutions to the issues discussed in section 3.0 have already been presented. These include alternative solutions for:

- EISA IT staffing
- Continuing the development of the Web portal
- Document management system

The activities current underway and the planning for additional activities are discussed in the next subsection.

4.1.1 Activities Currently Under Way

The preparation for the IT hardware and infrastructure installation is underway and will complete by November 30. The completion of running new CAT 5e cables is required before the new PC's can be installed. Over one-half of the new PC's will be replacements for existing, obsolete, or non-working PC's.

ACT, the hardware local vendor has begun planning for the infrastructure installation. As of November 12, they were planning configurations and parameters. The actual installation began November 20 and will continue through December 30.

4.1.2 Planned Close-in Activities

Jon Tomar, a BearingPoint IT Advisor will be onsite approximately December 1-15 to work with ACT and EISA in completion of the hardware and network installation. He will oversee the work; ensure that acceptable standards and conventions have been used in setting up configurations; ensure that acceptance test cases have been developed and run; and be certain that the system is fully functional so that it can be formally accepted by EISA. Among his activities are:

- Meet with ACT and EISA and review all installation configurations and parameters to ensure they are complete, utilize acceptable standards, and follow appropriate naming conventions.
- Review security parameters with ACT and EISA for routers, firewall, appliances, MS SQL Server, and MS Windows Server 2003.
- Assist EISA in developing UAT test cases to be run prior to system acceptance.
- Assist EISA in all planning, implementation, and project management of the infrastructure.
- Assist EISA in developing and executing a plan to phase in the new Office products on the existing PC's, a plan that is tied directly into the completion of the end-users Office Word training.
- Assist EISA in developing a phased plan to move their applications off the Dell server to the new HP servers.
- Assist EISA in developing a detailed generic implementation plan for the new document management system.

4.1.3 Activities for the Next 4 Months

The primary activities to be started or completed in the next 4 months are:

- Plan and establish a Help Desk. The plan should be developed by ACT and EISA, with assistance from Jon Tomar of BearingPoint.
- Develop detailed operational procedures for backups, restores, offsite storage of critical databases, and full system recovery procedures. This should be done by ACT, EISA, with review and assistance from Jon Tomar.
- Complete IT Training by the end of February, 2007.
- Complete all end-user Office and Outlook training by the end of March, 2007.
- Order and install the new document management system with IT technical training. Most of this will be done by the software vendor, starting in February, 2007. Oversight and management will be required by Jon Tomar of BearingPoint.
- Start and make significant progress on the systems and programming development of the Web portal. This will be done by EISA and BearingPoint.

5.0 APPENDIX

5.1 MEETINGS

Mr. John Yates, Ms. Gail Burns, Mr. J Hambric, Mr. Ismail Zidan, Mr. Ahmed Mostafa, Mr. Mohammed Hamid of BearingPoint. November 6, 7, 8, 9, 12, 14, 19, 20, 22.

Mrs. Omayma Nasr, General Manager, EISA IT, November 7, 8, 9, 13, 22, 23.

Mr. Sherif Fathy and Mrs. Navean Aziz , IT Systems Support Specialists, EISA IT, November 8, 13.

Dr. Ragaii Hassan, IT Consultant EISA IT, November 8, 12, 14, 22.

Mrs. Naglaa Issa, Manager of Sales, New Horizons Training Center, November 9.

Dr. Adel M. Rabeh, Chairman of EISA, November 12.

ACT, hardware equipment installation company, Mr. Wael Fawwaz Sales Manager and Mr. Ahmos Gad, Senior Consultant, November 13, 22.