

This checklist will outline each task that should be completed in order to successfully implement the Needles program. Please review it carefully, and share it with the members of your staff who will be involved in the roll out of your Needles program.

**If your training is onsite, make sure you have a conference room available with a projector or TV. If your training is via Webex, make sure you have reliable internet and phone access from your workstations. Avoiding interruptions as much as possible will greatly enhance the learning process.** We are here to assist you throughout this process to ensure that your training is successful and positive. Implementation Specialist, Desiree Page, and Director of Training, Meredith Murrah, are available to answer your questions before, during, and after your training. Please do not hesitate to contact us (410) 363-1976.

### ***Receive Needles software***

- Install SQL Anywhere and Needles program to server and all workstations.
- Complete Installation Checklist and retain for your records.
- Complete Additional Requirements section of Installation Instructions.
- Contact Needles Support Department at (410) 363-1976 to conduct official licensing.

### ***Receive phone call from your assigned Certified Needles Consultant and Trainer***

- Discuss the needs of your firm with Trainer.
- Review your current system/data with Trainer.
- Trainer will make recommendations regarding your existing system/data.
- Set goals and dates for your Implementation and Training.
- Receive follow up email with recap.
- Conduct staff meeting to generate enthusiasm and discuss Implementation.
- Complete Implementation Web Conference, if applicable.
- Confirm and finalize training dates with Trainer.
- Ensure you have an area set up that will be conducive to learning.
- Complete Implementation and Training.