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1 Launch

At this point, the build of your system is complete, and it is ready to use. Providing access to your new system for your end-users will require a few more steps.

The steps:

1. User Training.
2. User Acceptance Testing (UAT).
3. Release to Production (Launch).
4. Handover to Business as Usual (BAU).

After launch, you will enter your warranty period.

2 Steps

2.1 Training

eBMS offers system training using a 'Train the Trainer' approach. This training should involve a select group of individuals from your organisation who will be the "Trainers" and "Super Users", who are enabled to help others in your organisation understand the system and its' day to day use.

We will typically split training between User Training and Administrator Training, providing separate sessions for each.

2.1.1 Before the Training

Client Project Manager Checklist:

- Select the users who are to be involved in the System Training;
- Book a suitable location for the training session;
- Formally invite your attendees;
- Prepare and include any applicable supplementary Business Process-based training,

EBMS will:

- Create the user manuals;
- Provide the Client Project Manager with a copy of the User Manuals ahead of time;
- Make sure that the test system you will use for the training sessions is a mirror image of the UAT system.

2.1.2 On the Day (General)

It is important to establish upfront that the session is for training and not an opportunity for feedback on the system. It can be easy for the training session to get side-tracked talking about what “could or should have been done”, and subsequently to never actually finish working through the training materials.

It is a good idea to mention this to the attendees and instruct them to give the Client Project Manager or Client Business Analyst their feedback afterwards during the UAT so that all input is appropriately recorded for later consideration.

The Client Project Manager may wish to arrange to add Business Process information into the training. When these topics are discussed, a client representative must explain the content to your attendees, as eBMS is not qualified to teach you your own procedures.

2.1.3 User Training

When selecting the ‘Trainers’, it would be beneficial to choose people who will be the key users and/or people with systems experience.

User Training will involve demonstrating the areas of the system built during the project, as this can include workflows, dashboards, approvals, reporting etc.

By the end of the training session, the ‘Trainers’ should be confident to work through the system and explain it to others. System User Manuals will also be provided, which will provide a way for users to refresh their knowledge on how to use the system beyond the training session.

2.1.4 Administrator Training

The system will require some users to handle day to day administrative functions, for example: adding users, resetting user passwords, checking the system audit report. These users will take part in a dedicated Administrator Training session.

We recommend that your administrators are also system users so that they remain familiar with the system. It can also be helpful that they have some IT experience in their background.

2.1.5 After the Training

The Client Project Manager is to provide a list of required Users, and the Access level they will require to undertake their tasks.

EBMS will create all required User Accounts and provide user access details to the Client Project Manager.

2.2 User Acceptance Testing (UAT)

2.2.1 Overview

It is anticipated that you will undertake some kind of formal testing before going live with your new system – this process is usually undertaken by system users who have previously been involved in developing and testing the new system – hence it is often known as User Acceptance testing (UAT).

Below is a suggested approach which we have observed to work well in many organisations.

2.2.2 Preparation

UAT is the final stage of the project testing process. During UAT, you conduct rigorous system testing to ensure that the solution matches your approved Functional Specification documentation as the final step in the process prior to releasing the system to Production.

Important note: At this stage, new requirements will not be considered, as the focus is on answering the question: “Does this system meet the requirements as specified?”

Decide who from your team will take part in the UAT. It is a good idea to include testers that have prior involvement in the project and the solution. Introducing new people at this stage will result in reports resulting from user error and non-familiarity with the manner that the system was implemented. Obviously, this stage is too late for such input to be addressed before moving to Production.

The Client Project Manager and eBMS Project Managers are required to document the factors which will constitute a successful UAT. For instance, it is usual that any failure determined to be Critical (eg it prevents use of the system) must be tested successfully to achieve a pass, whilst an annual report which displays some errors could be addressed at a later time so as not to prevent an delay in the System Launch.

Client Project Manager Checklist:

- Ensure all members of your UAT Team have their correct login details;
- Book their calendars and confirm attendance;
- Ensure all test cases are printed out and ready to be used by your team.

If you encounter a problem that prevents further testing, please contact your eBMS Project Manager immediately so that it may be resolved.

2.2.3 On the Day

The UAT process itself is straightforward. You should have pre-prepared test cases for your testers to follow. If a test case passes, sign it off as “Passed”. If a test case fails, mark it as “Failed” indicating why and where it failed so that eBMS can diagnose and correct the error. Screenshots can be particularly useful here.

Note that eBMS cannot write your test cases for you, as you are testing your own processes within the system.

2.2.4 Sign-Off

When UAT has achieved the required result – ie all critical items passed – then you will be required to sign the Acceptance Document provided by your eBMS Project Manager.

Now your system can be prepared for Release!

2.3 Preparing for Release

The implemented system is ready to be released, but there are other dependencies that may need to be taken care of.

Please consider:

- Are there internal IT processes to be followed?
- Is there a server environment to be deployed?
- Is there production integration to be deployed and tested?
- Does live data have to be imported into the new system?

Some of these tasks can have significant lead time requirements, so plan this early.

It is also a good idea to check in with your eBMS Project Manager.

Remember to keep your stakeholders informed.

2.4 Release to Production

eBMS avoids referring to a 'go live' event. We have learnt through long and hard experience that "Go-Live" means different things to different people. Ultimately the final milestone for us is to "Migrate to Production." It is up to you as the client to decide when the system is available for access by all your users, and separating these concepts gives you greater freedom of choice.

At this stage, we will release the UAT certified system into a production environment.

2.5 Celebrate

Implementing a new system is **hard**. You should congratulate yourselves on a job well done.



We recommend you buy a cake for your hard workers 😊

Now would be a good time for an Account Manager Checkpoint (Refer back to Field Guide S2 – SIMPLE Requirements (Stage 1) –Account Manager Checkpoint for the procedure). Your eBMS Project Manager will organise this for you.



2.6 Handover to Business as Usual (BAU)

Your eBMS Project Manager will organise a Handover to BAU meeting. This is likely to be a Video/Conference Call, as a physical eBMS presence is not usually required.

Before the meeting you will be provided with:

- An eBMS Support Services document;
- A Nimblex Support Cheat Sheet.

On the eBMS side, the following will attend:

- The Project team;
- The eBMS Support representative.

From your side you should invite:

- Your System Administrators;
- Your Support staff;
- Your Management Team.

We will introduce you to our support staff and talk you through the support process, followed by an opportunity for you to ask any questions you may have about support.

After the meeting we will provide you with:

- Freshdesk user ids for the administrators and client support staff (Note: eBMS offers 3rd level support, you will be responsible for the handling of first and second level support with an internal team)

Please read **Field Guide G1 – Support** and the **Support Cheat Sheet**

2.7 Warranty

eBMS provides a three-month (unless otherwise negotiated) warranty after completion. This warranty covers only non-compliance with the Functional Specification. In order to make a claim against your warranty, you will be required to provide a reference to the relevant specification.

The warranty period does not cover additions or changes outside of the Specification. Any changes, additions or support will be handled through our Change Request procedure and will be separately chargeable.

Please read **Field Guide G1 – Support** and the **Support Cheat Sheet**

3 Read More

This is the last guide in sequence. Please refer back to **S0 – SIMPLE Read This First** to find more field guides that might be relevant to you.



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