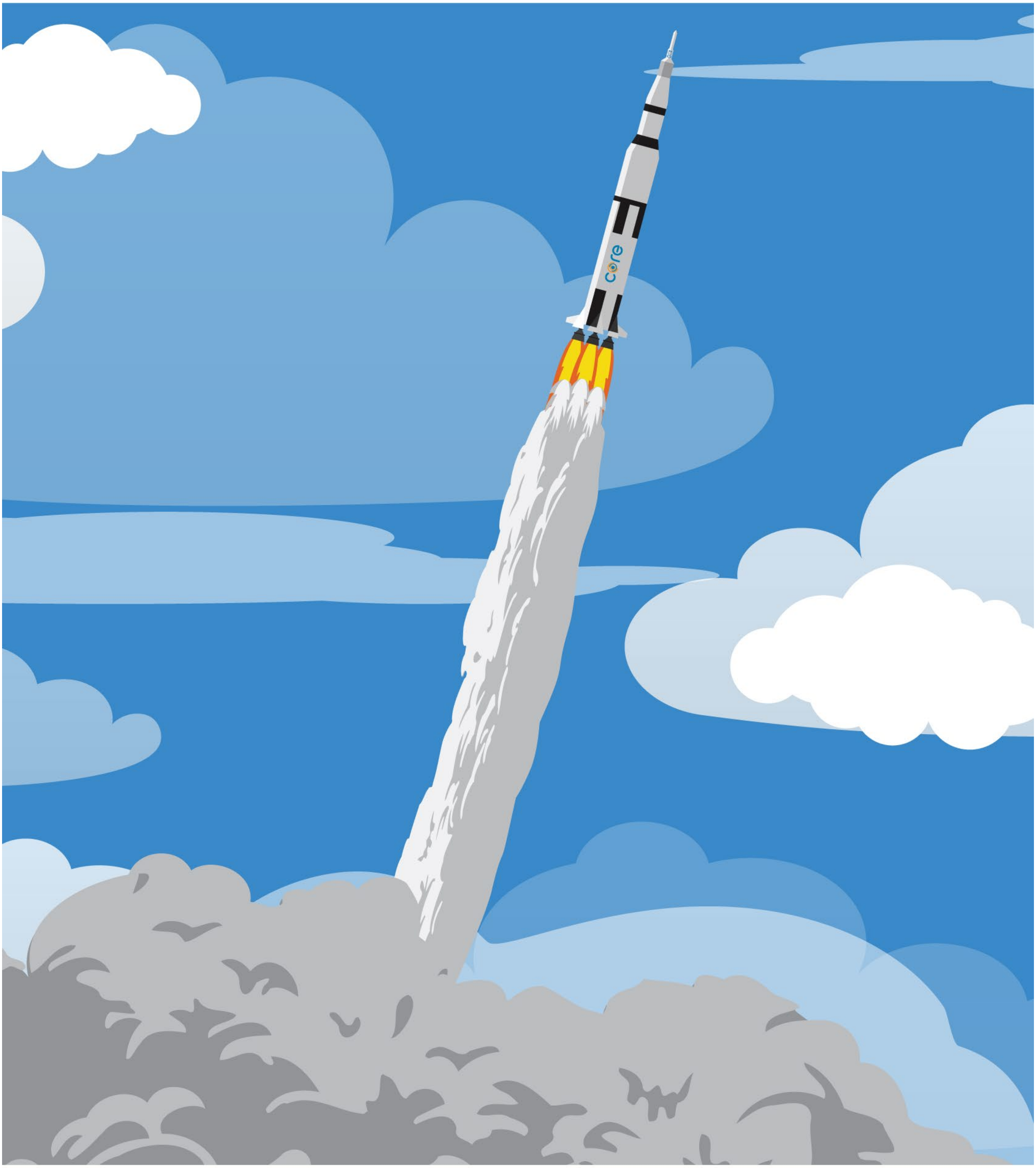
B4

# Field Guide: Launched

BRIDGE

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# Contents

# 1. Launch

At this point, the configuration 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’. They will then be 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 you with a copy of the user manuals ahead of time

### 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 you as the Project Manager their feedback afterwards during the UAT so that all input is appropriately recorded for later consideration.

You 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. 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 and 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

UAT is the final stage of the project testing process. Testing is conducted by system users and provides confidence that the system meets the requirements. This is 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?"**

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

## 2.2.2 Preparation

Decide who is responsible to conduct the planning and managing of UAT and who will participate in testing. It is a good idea to include testers that have prior involvement in the project and the solution and who have been trained in using the new system

Decide how many test cycles will be used. Planning more than one cycle will allow for workflows to be separated where required, defects to be identified, fixed and tests to be re-run. Allow some time between each cycle to fix defects and re start testing. Schedule the dates for the test cycles and confirm with eBMS Project Manager

The Client Project Manager and eBMS Project Managers determine and document the factors which will constitute a successful UAT. For instance, a Critical defect (e.g. it prevents use of the system) must be fixed before testing can continue or be completed, whilst an annual report which displays some errors could fixed at a later time so as not to prevent a delay in the System Launch.

**Client Project Manager Checklist**:

- Decide how many test cycles you will conduct.
- Identify and document test scenarios which reflect the requirements and business workflows
- From test scenarios prepare and document test cases with clear steps for users to follow
- Map test cases / scenarios back to your requirements to ensure all have been included
- Decide which roles are required to complete the scenarios and who will play these roles during testing. More than one person may be required.
- Confirm with eBMS project manager when you plan to conduct testing
- Book participants calendars and confirm attendance
- Confirm testing environment
- Prepare test data e.g. A contract
- Set up a central hub and book if required e.g Meeting room, zoom meeting, ensure all members of your UAT Team have their correct login details
- Ensure all test cases are printed out and ready to be used by each team member

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

Meet with the test participants and provide an introduction. Explain the expectations for testing and how to provide feedback. 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.

Remaining in a central hub after the introduction meeting will provide a place where participants’ can communicate directly with the test Manager during testing will assist to ensure any questions or concerns can be addressed and known defects can be communicated to participants, allowing the testing to continue.

After each test cycle, collate feedback from participants and combine in one document/ register, removing duplicate information. Provide feedback to eBMS Project Manager. Arrange to meet with the eBMS Project Manager regularly during testing to provide feedback and receive updates on fixes.

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 – i.e. 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 😊.

### Check-in Meeting

Goals of the meeting:

- Clarify your and our expectations
- Address any concerns you might have

With the above in mind, please consider the following questions prior to your Checkpoint meeting:

- Are project activities clear and unambiguous so far?
- Will all levels of stakeholders understand what you, your team and eBMS have completed?
- Have relevant users and stakeholders contributed to this stage?
- Is your team functioning effectively?
- Is the eBMS team functioning effectively?
- How does your Sponsor view the progress thus far?
- Are the commitments made and contained in the Project Charter document being actioned?
- Is the delivery up to this point still reflecting the Project Purpose and Vision?
- Are you and eBMS still on track to achieve the Project Objectives?
- Are the risks and issues raised so far being addressed effectively?
- What are the additional risks that have arisen and what risks have fallen away?

Your Account Manager looks forward to discussing your answers to the above questions.

## 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 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 third 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 the sequence. Please refer back to **B1-BRIDGE – Project Introduction** to find more field guides that might be relevant to you.

For further information, please contact:
info@ebms.com.au | 1300 721 159 | 03 9958 0000