# Implementation method

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## Copyright Note



## Related Documents and information

Please also refer to the following important documents:

- iDocuments Specification and configuration documentation www.idocuments.co.uk/help/
- iDocuments Technical Specification www.idocuments.co.uk/technical/
- Support Guide www.idocuments.co.uk/supportguide
- The terms on which Synantix Limited licenses its software to customers is available online at www.idocuments.co.uk/terms-and-conditions

## Feedback and Questions

If you have any questions, feedback or require any clarification on matters relating to this document or any aspect of iDocuments products or services then please email **support@synantix.com**

## 1. Introduction

This document describes the method and approach for implementing iDocuments applications by Synantix. It is a proven 5 stage structured approach that is based upon a standard templated approach to make implementation and deployment of iDocuments solutions easy, straightforward and efficient for our customers.

## 2. Five stages of iDocuments implementation

The document covers the following 5 key implementation stages which are described in the following section and Appendix.

- Stage 1 Project Initiation
- Stage 2 System Design
- Stage 3 Configuration
- Stage 4 Transition
- Stage 5 Go-live

## 3. Online resources and information

Information is provided online to customers including standard user guides in MS Word format which can be adapted by customers in order to create their own training and user guides, sample test scripts and supporting project documents www.idocuments.co.uk/help/

iDocuments Technical Specification www.idocuments.co.uk/technical/

An online CRM portal is provided so customers can log and track the status of queries, issues and other items whilst testing the system.

## 4. Key deliverables and documents

The following documents are very important and should be referred to throughout the implementation project:

- Project Initiation Document - This document describes the scope of the project and roles, tasks and responsibilities covering design, configuration, user acceptance testing and operation of iDocuments. Once the Project Initiation has been completed, the document will be updated and circulated for approval by the customer.
- Project Plan
- Functional Specification – produced following Design/System Configuration Workshop
- User names and roles – iDocuments will provide the customer with a spreadsheet to complete containing information for users and roles
- iDocuments Technical Specification – a document detailing minimum server information
- Change Request/Management documents
- Go live readiness check and sign-off
- Support Guide & Services for iDocuments customers – a document which describes customer support services provided and contact details. Please note all support issues and product feedback should follow iDocuments support procedures.

## 5. Formal approval points

There are certain key approval points in the project which are vital to ensuring that the system implemented meets the requirements of the customer. The formal signoff points are shown in Project Plan and are specifically:

- Approval by the customer of the System Configuration Specification
- Handover of the system for Customer Acceptance Testing
- Customer Acceptance Testing Project Sign-Off before Go Live

## 6. Change control

Major project deliverables, e.g. Functional Specification, will be placed under 'change control' as soon as they have been completed, reviewed and approved. For example, once the Functional Specification document has been approved, all changes in succeeding phases that affect the set-up of the system for your organization needs to be reflected in a revised version of the Functional Specification document.

Any changes or variations to the project are controlled through Change Request Forms (CRF). A CRF is used to notify all parties of any specific condition which may change the costs or target date of a project and/or change the scope of the agreed work.

The Change Request Form should also be completed where a customer requests an enhancement to the core product suite.

## 7. Project Initiation

The Project Initiation meeting is the formal start project and will cover the following:

- Review project scope and agree project plan
- Confirmation of roles and responsibilities of all resources from IDocuments and Customer.
- Project Plan – dates and timescales

## 8. System Design

### Solution Design

The System Design Workshop (SDW) is a key event involving users and members of the customer's project team. The objective of the SDW is to walk through the standard iDocuments product with the customer's project team in order to identify the customer's specific configuration requirements.

### System Design Workshop

It is very important that the customer understands the package parameter options of the iDocuments product so that business and system implementation decisions can be made and documented in the Functional Specification. As part of the System Design Workshop the iDocuments consultant will walk through the iDocuments application and discuss and agree configuration changes required by the customer. These will be documented in the Functional Specification. Areas that will be discussed and covered in the System Design Workshop are:

- Confirm products purchased and numbers of users
- Business rules and document workflow
- Approval limits and levels
- Additional data requirements
- Data import requirements e.g. credit card files

- Non-standard reporting requirements
- Email system integration
- Technical specification – see iDocuments Technical Specification

iDocuments will prepare a Functional Specification following the System Design Workshop and submit this document to the customer for approval before commencing system configuration.

## Functional Specification

The Functional Specification is a document that defines how the iDocuments system will be set up and it contains all the requirements for the system discussed with the customer. The Functional Specification supersedes all previous discussions, so it is important that it contains all requirements.

The Functional Specification should be signed-off by the Customer project team before installation and configuration activities commence. The purpose of this document is to verify that all requirements have been anticipated and correctly interpreted and addressed. This document will reflect the set-up decisions and the scope of the system to be delivered.

The Functional Specification document will be produced following the Design Workshop and include where appropriate any documented requirements provided by the Customer that are relevant to the implementation of iDocuments.

## Customer specific development/non-standard requirements

If any customer specific enhancements or non-standard requirements are identified and documented in the Functional Specification, then that development work will be carried out at this point and incorporated into the product.

## 9. Configuration

The system will be set-up and configured in accordance with the requirements specified in the Functional Specification. Configuration includes the set-up of:

- Set up companies/legal entities and link to ERP
- ERP integration
- Import users and set up profiles
- Define Groups (Departments, teams etc) and link to GL Codes/Items Code/Analysis Codes
- Roles - approval levels and access rights
- Approval workflows
- Analysis codes and any customer specific user defined fields
- Purchase Order template – to develop test and install custom PO template
- Reports (standard and any customer specific reports)
- Business rules
- Company and system settings
- Invoice capture and mailboxes
- Integration with other systems via API/web service
- Set up HR user defined fields
- Timesheet set-up
- Set holiday rules and entitlements
- Mobile apps

## Pre-handover QA testing

iDocuments consultants with test the system using standard test scripts and the customer's Functional Specification before handover to the customer to ensure all required detailed in the Functional Specification are met.

## Installation

Installation of the software and configuration on the customer's servers should be in accordance with the latest iDocuments Technical Specification and installation details document completed by the customer's IT representatives. The customer must ensure they have in place an appropriate systems production environment to support the system including access and security controls, firewall protection, back up and disaster recovery procedures.

The customer should implement a test and production environment so that they can test subsequent upgrades and systems changes before they are applied to live.

## System handover and training

Our Consultant will walk through the system configuration with the customer's Project Manager and User Representatives.

The Handover will consist of going through System Administration, configuration and processes with the customer Team members who will be involved in User Acceptance Testing. There will be a step by step review of each section of the Functional Specification Document. Any issues, questions arising from the handover meeting will be noted for further action.

It is very important that the customer representatives at this meeting satisfy themselves that all requirements specified in the Functional Specification have been fully met and that any deviations or issues are noted. We recommend that any changes in the system or specification are not made at this meeting; but noted and changes discussed with the customer and made later.

## User Acceptance Testing

User Acceptance Testing (UAT) will be carried out by the customer to ensure that the system has been set up according to requirements specified in the Functional Specification. Sample test scripts are provided by iDocuments which can be extended by the customer project team to ensure their specific requirements are covered during testing

User Acceptance Testing is a very important and the customer project team must ensure appropriate time and resources are allocated to this task to be satisfied that the delivered system operates in accordance with the Functional Specification.

During User Acceptance Testing change control should be rigorously applied to ensure that the system does not grow outside its original scope and that no changes are applied which could have an unpredicted knock on effect in other areas of the application.

If a pilot or parallel run activity is to take place it is still important that User Acceptance Testing is undertaken by the project team beforehand. Satisfactory completion of these tests would allow the system to be signed off.

# 10. Go-live

Following User Acceptance Testing (UAT) the Customer will sign Project Sign-Off Form and Go-Live Readiness Checklist to confirm they are ready to go live. The system go-live should be carried out such that the implemented system, including all documentation, is transferred to the appropriate personnel responsible for its ongoing support.

Ongoing help and support should be via the iDocuments support team, see Support Guide & Services document for further information.

## APPENDIX iDocuments implementation method overview

Implementation of iDocuments applications is grouped into major stages, each with clearly defined deliverables that are necessary for subsequent stages as shown in the diagram below.

| Stage 1 | Stage 2 | Stage 3 | Stage 4 | Stage 5 |
|---|---|---|---|---|
| PROJECT INITITIATION | SYSTEM DESIGN | CONFIGURATION | TRANSITION | GO-LIVE |
| Handover from sales | System design workshop | Installation software | Project team prepare user documentation and training | Execute cut-over plan |
| Project kick-off | Data capture spreadsheets | Configure system | End user training | Review plan for open issues |
| Project team definition | Product installation document | Handover | Data migration if required | Go-live support |
| Create Project Initiation Document (PID) | Create Functional Spec | System admin training | Create production and test | Plan next phase |
| Prepare Project Plan | Present and review Functional Spec | Data migration (if required) | Go-Live Readiness review | |
| Review technical Specification and requirements | Functional Spec revisions | User acceptance testing | | |
| | Data capture spreadsheets | Freeze system | | |
| | | Prepare cut-over plan | | |
| **Sign off PID** | **Sign Off Functional Spec** | **Sign off UAT** | **System readiness sign off** | **Support handover** |