Introduction

This section provides information and standard documents to help you implement iDocuments. This information is designed to complement whatever project management methodology that your organization uses.

iDocuments

iDocuments is an off-the-shelf software application that incorporates facilities which allow you to configure elements such roles, groups, approval workflows and matrices, business rules and expense policies in line with your organization's requirements. Many of the functions in iDocuments such as purchasing and expenses integrate closely with your organization's ERP or accounting system to ensure that data is consistent and accurate.

Online resources

The following online resources are available to assist in the implementation process and well as helping you maintain and run the system on an ongoing basis:

Online help and resources www.idocuments.co.uk/help

Technical specification www.idocuments.co.uk/technical

Product description www.idocuments.co.uk/overview

Online CRM portal https://synantix.crmdesk.com/home.aspx

We are continually enhancing the product in line with emerging business and technical requirements so please ensure you refer to up to date online material.

Process Overview

We have endeavored to make iDocuments implementation as straightforward, standard and simple as possible and this is achieved through 4 key elements shown in diagram below and briefly explained in subsequent sections.
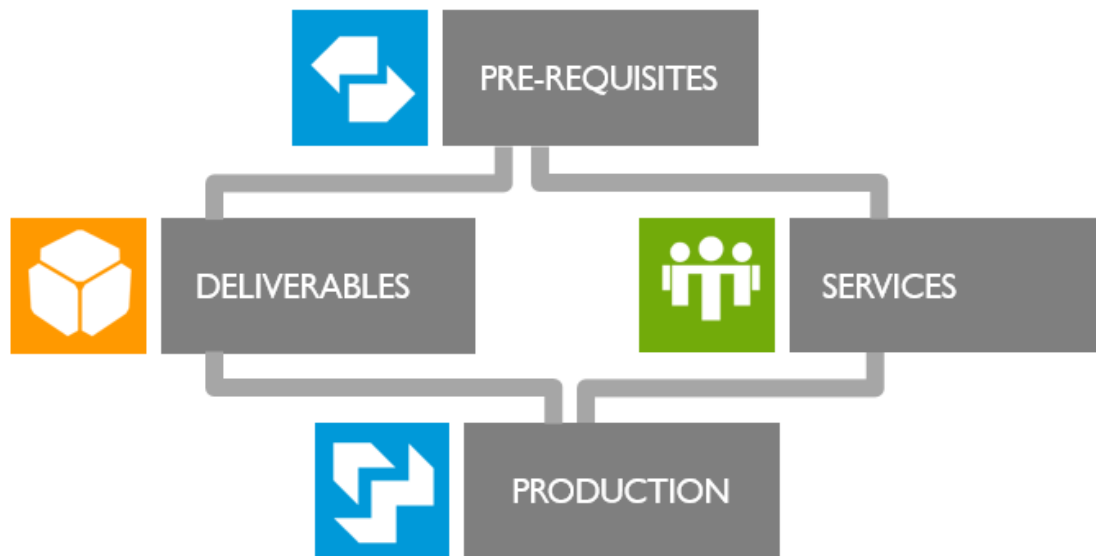
Prerequisites

In the first instance you need to provide the following information:

- Configuration data such as users, approval workflows, roles and groups.
- Installation details document which describes access information and technical information required in order to install the system
- ERP integration details and specification will describe how information should be transmitted between the system and the ERP/Accounting that your organization uses.

Deliverables

Key deliverables are:

- System design document which describes how the system will be implemented for your organization using **Prerequisites** information described above.
- Configured system
- Integration with ERP
- Installation handover documentation
- Sample test scripts

Services

A range of professional services are provided to assist with successful implementation, these include:

- System review and design
- Development of core product enhancements
- Installation and technical reviews
- Solution handover and training – train the trainer
- End user documentation
- UAT support and assistance
- Go-live readiness check
- Production cut-over

All of these elements will be incorporated into the project plan that we or our business partner who is working with you will help you to produce.

Production

We provide a go-live readiness assessment document which is deigned help you check that your organization is ready to use the system in a production environment. We can also assist with preparing a go-live plan.