Creative Software Solutions (Europe) Limited A Lead Officer Outline for Planning and Implementing a TCES Community Upgrade

This outline delivers a perspective of tasks to be undertaken for a successful upgrade of users from TCES Connections to TCES Community. The document is aimed at lead officers and project managers.
This Onboarding process was updated June 2019.

Introduction to Onboarding TCES Connections Customers to TCES Community

Onboarding customers from TCES Connections to TCES Community is a relatively simple and straightforward undertaking. During the upgrade, users will experience no downtime due to a unified Database and therefore will always have a failover option back into TCES Connections if they experience issues of any kind.

Our support teams are on hand to ensure any user requiring help or support can be attended to quickly.

The overarching concept of TCES Community is to bring six products into one workspace, those being Community Equipment (CES), Wheelchair administration, Wheelchair clinical, Wheelchair workshops, Falls Prevention, Continence, Adaptations, Configurator and Reporting; one logon multiple options.

In most cases, users may not have multiple product integrations and hence much of the upgrade planning and UAT must be focused on ensuring all options currently selected in their product range are switched to the required settings and functionality tested. Your delivery team should be well educated in these options and help assist you through the programme, you can if required undertake these tasks with your own upgrade team with minimal support from CSS should you wish to do so.

For ease and operational simplicity upgrade document focuses on transferring only TCES Connections CES contracts to TCES Community.

Frequently Asked Questions

What will I gain in the upgrade?	Upgrading to TCES Community will offer you and your local authority a safe, secure and easy to use developing platform where new innovations and cost-saving and efficiency opportunities will occur as the platform evolves. These changes and innovation will be brought to you as they become available all free of charge. As a user, you will also have the ability to shape and influence the product as it develops and hence offering a premium product to those colleagues who use the system and to those we serve

You will also be joining one of the largest and fast-growing community equipment collaboration platforms where councils can learn from each other and work together to save vital resources in the UK.

Your teams will also experience new features, for example :

- Single sign-on;
- Integrated configurator and Embedded Power BI, management and KPI reporting;
- Inline training and support features;

- Gain efficiencies through mobile in-field working on any smartphone, or tablet IOS or Android
- Integration with the NHS spine;
- Embedded online clinical documents;
- Custom dashboards and user interface experiences;
- White Labelling and DNS opportunities;
- Citizen Portal for Service Users and their carers;
- Improved usability and integration with Browsealoud for visually impaired users.

Why did you build TCES Community and not continue improving TCES Connections?	TCES Connections was produced organically, the Microsoft software (asp.net v2) used to build the platform is very dated and does not afford us some of the opportunities that are available in the new and improved development suite. Many of the great features users are now used to in products they use every day such as Amazon, Autotrader, Facebook etc can now be utilised by our development team to further develop usability and functionality in our site. We could not have achieved those opportunities in the old development suite. For those reasons, we have now ceased to develop any new functionality in TCES Connections.
Which users will achieve the greatest benefit in the shortest timeframe?	Contract Leads, why, because they have new easy to use functionality all in one place along with integrated reporting tools with customisable dashboard options and full drill into invoices in real-time. Clinical Authorisers, why, as they can manage users and authorise on the go with their smartphone In-field clinicians, why, because they can work on the go with their smartphone using slower speeds to get product there at the same time as they don't have to return to the office to order and miss cut off times.
How many users does TCES Community have?	Over 10,000 and growing each week. We expect to be up to 75,000 by March 2020.
How do I influence the new product and is there a product roadmap available?	Start using it and get involved. We would love to hear about what your users like and don't like and how we can improve. Should you wish to view our roadmap at any time and see our progress just go to www.csseurope.co.uk/documents/tces-community-product-roadmap-2019/.
Will there be user groups and can I attend?	We are planning for a March 2020 Digital transformation workshop at the NEC and a further workgroup in September 2020 in Leeds.
How long will the upgrade take?	That depends on what track you take, Big Bang or Incremental. Frankly, it doesn't matter. But realistically for 1,000 users incrementally we think you can achieve a full offboarding and onboarding in 4 to 5 weeks.
Do I need to change all users in one go?	No, you can migrate users, teams, user types in any sequence and volume, whatever makes your authority comfortable and to suit your resource availability.
Is classroom training required for users	We believe that users familiar with the TCES Connections ordering and tracking process will find the process as simple or more simplistic in TCES Community. The interactive training now embedded in TCES Community will help guide users from an overview and inline training perspective. As always we continue to trial this approach and welcome feedback but essentially we believe it to be the most economical and focused training method and especially useful for locums and new starters.

How will it make us more efficient?	We want TCES Community to empower users and enable them to deliver the services end users require as quickly and efficiently as possible. TCES Community allows for in-field working on Smartphones and now allows quick collect or repair just by scanning the product barcode. This combined with diary management and route planning and the capability of SMS and email ETA's for prescribers when visiting service users makes everything work just a little bit quicker and more efficiently for all concerned.
Will TCES Community save us money?	We hope so but it all depends on how you configure spend and equipment matrices, configure workflows, work in the field, use toolkits and recycle. Our professional services team can help you with all these.
Are Toolkits available in TCES Community and will I need to change anything?	Yes, all toolkits have been upgraded into TCES Community with improved functionality.
What are the risks?	We see zero risks as both platforms run in parallel with the ability to move back and use the TCES Connections platform at any time throughout the upgrade.
What will it cost?	There is no upgrade licencing cost, should you need help from our professional services team they will be glad to offer you an upgrade quote.
Are there any security risks?	Security is improved not degraded.
Do we need to inform our equipment and logistics provider or subcontractors	If you have been using TCES Connections the logistics and equipment provider will receive and pass the same information so there is no change, however, we would recommend a discussion and planning with your provider account manager at an early stage of adoption.
Will I get the same reports, and will reporting change in any way?	All reports will be migrated and embedded. Users will then have the facility to use embedded power Bi and the all-new report suite with integrated invoicing on demand.
If we don't like TCES Community can we go back to the old software?	We will keep enabled TCES Connections until all users have migrated and the interface is redundant, it will then be available for a further 90 days.
What happens if I don't choose to upgrade?	Don't worry we will continue to support TCES Connections until it has no users. The only downside is that your authority will not benefit from the upgrades and improvements to the solution.
Will it affect the logistics platform?	No TCES Community only brings enhancements to the logistics platform.

Planning the Upgrade	Phase 1
Big Bang or Incremental	White Labelling and DNS options
Resources Required	Communications & Frequently Asked Questions
What Products for Which User Type	Communication Assistance from the Support team via TCES Connections
Hospital, Clinics and Care Homes, data cleansing	Site direction by User Type
In Product training experience	In Field Workers
Letting The Support Team Know	Dates

Extending to Service Users through the Citizen Portal and
embedding in council sites

Extending to Retailers

Planning Impact by User Type

Phase 1

User Type

Impact Analysis

Contract Commissioners

Contract Lead Officers

Clinical Leads

Administrative Leads

Health and Social Prescribers

Peripheral Store Managers and Users

Mobilisation and Implementation

Phase 1 - 1 Day

Project Management

This workstream underpins all other workstreams from the onset
of mobilisation, through implementation and post-implementation
to Project Closure. It is essential that;

- A dedicated team is assigned to the project for the whole
  duration of the project

- Other resources required are available when their input
  is projected – resource reservation and allocation

- Weekly conference calls during the term of the
  implementation are attended by key resources with
  notice given in advance by either party where a meeting
  must be rescheduled

- Meeting Minutes circulated by CSS are actioned where
  required to maintain progress

- Issues and concerns are raised early or immediately
  identified to enable the triggering of a risk mitigation
  action found in our 9 point project risk assessment
  document.

Information Governance and Security

This section ensures all parties abide with a Data Protection
Impact Assessment (DPIA) criteria and relevant signatories are
obtained prior to data migration and system configuration with
Personal Identifiable Data. Completion of this section also acts as
a precursor to the first "test cut" data being shared with CSS.

- Key phases of the project are signed off prior to the next stage commencing. The project plan will indicate signoff stages and its link to a future phase.

Key Tools	
Risk Planning and Mitigation	http://pro-cloud.org/wp-content/uploads/2019/09/CSS-Implementation-9-Mistakes-web.pdf
Project Organogram	Link will be advised
Secure Microsoft Share Point Link	Link will be advised
Smartsheet (Project Management)	www.smartsheet.com login will be advised
Workflow Documentation	Available in Share Point

Pro-Cloud Platform Configuration

TCES Connections workflow discovery

This stage seeks to identify all workflows which the customer currently utilises in TCES Connections and ensure that:

1. All workflows are available

2. There is no functional loss

3. There is an improvement, cost efficiency, operating efficiency available which can be identified and utilised

4. There are no performance issues

5. There is no impact on the service user

6. Understand any upgrade training issues for the process if they exist.

Phase 2 - 3 Days

System Workflow Templates
1. SU Delivery desktop
2. SU Collection desktop
3. SU Repair desktop
4. SU Repair Replace desktop
5. SU Delivery In Field
6. SU Collection In Field
7. SU Repair In Field
8. SU Repair Replace In Field
9. Buy new special
10. Use recycled special
11. Toolkits in field
12. Toolkits desktop
13. Adding new prescribers
14. Managing prescribers
15. Managing Teams
16. Managing Groups
17. Reporting

Networking

White labelling, graphics and DNS should be agreed and tested.

Interface Configuration
1. Catalogue
2. Dashboards

3. Home page

4. Quick Order

5. Speed Selector

6. Workload Tools

Key Tools	
Secure Microsoft Share Point Link	The link will be advised
Smartsheet (Project Management)	www.smartsheet.com login will be advised
Workflow Documentation	Available in Share Point

User Acceptance Testing (UAT) (Iterative)

Non-Production UAT Platform

Using our non-production UAT platform configured to 100% actual Live environment settings, CSS can provide a real-life experience of the final system during the phases of implementation.

The phases include;

- TCES Community System User Acceptance

- Integrated Power BI Tests

All acceptance testing is conjunction with process workflow documents to ensure written sequencing of organisational processes which can then be referred to within the scope of ISO 9001 and 27001 accreditation.

Empty States

We expect no empty states in training and that the training environment 100% mimics day to day operation including PIN matrices, Response Speeds and Catalogue configurations.

Digital Customer Signoff Milestone Phase 3 - 2 Days

Acceptability

The UAT platform is deemed acceptable for use when the implementation phase progresses into the Training phase.

The system should be configured for use in a similar real live environment for the training phase. Once lead officer training is complete CSS believes the trainees can now undertake a formal User Acceptance trial of the system using the new-found knowledge of the system. Any changes required can be made at this stage.

The Live platform setup and configuration commences at the stage when the User Acceptance process is signed off. Full UAT plans and results are made available to the client.

During the contract enhancements, changes and improvements can be undertaken on this platform prior to application on the Live platform.

Key Tools	
Secure Microsoft Share Point Link	The link will be advised
Smartsheet (Project Management)	www.smartsheet.com login will be advised
Workflow Documentation	Available in Share Point

Pro-Cloud Configured Solutions Training

Digital Customer Signoff Milestone Phase 4 - 3 Days

Role-based Training Plans

Planning of training is core in this phase, ensuring training covers all job roles and key functionality is essential and therefore requires signoff before training is planned.

User Training by Champions

Pro-Cloud Module by Module, Role Play User Training champion led (not exhaustive)

- Warehouse Management;
- Asset Management
- Customer Services;
- Logistics;
- Maintenance;
- Performance and Improvement.

Champions Training

Specific considerations apply here with detailed documents assisting in making the right decisions and detailed planning in regard to training. This includes but is not limited to

- Champions – selecting the right individuals who can return to bases and train colleagues on the use of the system
- Location – considerations include area, accessibility, comfort and facilities available at the location;
- Dates – deciding on dates that allow the Champions to reach out to the wider Prescriber community and then giving individuals to access our online self-training portal.

Further Training and Return to Education

Post-training continued use of the UAT platform to improve skills is highly recommended. At this stage, the opportunity to run similar trials of actual live orders on the UAT platform will give and real-live experience to the individuals undertaking this exercise.

All staff members who will use the system on launch date should have trials on the UAT platform prior to launch to give them some assurances of the new system whilst reducing normal anxiety experienced in the introduction of a new system.

Key Tools

Secure Microsoft Share Point Link	The link will be advised for Training plans
Smartsheet (Project Management)	www.smartsheet.com login will be advised
Workflow Documentation	Available in Share Point
Training Site & Documents	Link made available

Pro-Cloud Live System Configuration & Pre-Launch Trials

Phase 5

Data Migration

No requirements for data migration are required in upgrading from TCES Connections to TCES Community.

System Configuration

No system configuration is required when upgrading from TCES Connections to TCES Community.

Key Tools	
Smartsheet (Project Management)	www.smartsheet.com login will be advised
Workflow Documentation	Available in Share Point
Secure Microsoft Share Point Link	Data Files

Launch Phase

Phase 6 (Digitally Signed Phase) - 1 Day

Customer Validation

On completion of data imports and pre-launch trials, validation checks are undertaken by CSS internal Quality Assurance team.

The customer will be required to undertake similar validation checks on samples of data

- Asset Import
- Catalogue
- User Accounts

    o   Login and Change Password – this requires an email link and verifies the customers' local system is allowing emails from Pro-Cloud via their Firewall

    o   View Catalogue

Launch Week

System readiness is planned to occur at least 1-week before launch. At this stage, all aspects of the system should be ready for use with all checks done.The system is signed off to launch and the customer has a choice of a "soft launch" i.e. start sooner or launch on the published date.Individuals who have been integral to the implementation process and training and trials should be available to act as support to their colleagues.

Transition to Helpdesk

The Customer Service Account Officer will be fully engaged with the project at this stage with prior involvement at the configuration stage. They will be in a position to take over the day-to-day assistance via our Zendesk Helpdesk online system as well as via our Telephone support line.Customer service team members dedicated to your project will be on-site in order to best understand your support needs when back in the office.

On-Going Site Support Whilst Needed

CSS provides onsite assistance where needed and welcome for the launch period ensuring the customer team are supported in the switchover to the new system.

Where resources are available CSS will provide support in;

- Customer Services & Administration
- System Administration
- Data
- Warehouse and Logistics

Key Tools	
Smartsheet (Project Management)	www.smartsheet.com login will be advised
Workflow Documentation	Available in Share Point
Secure Microsoft Share Point Link	Data Files
Zendesk	Support Tickets

Project Signoff

Signoff Exercise and Documentation

CSS will undertake a Project Signoff exercise post-launch and no sooner than 7 days post-launch. This phase is an indicator that all setup configurations have been completed and operating to plan.

There should be no outstanding implementation actions at this stage.

The customer could, however, have an open ongoing day-to-day operational ticket which may be deemed as not linked to the project implementation.

Phase 7 (Digitally Signed Phase) - 1 Day

Contract Review, SLA Educate, Washup and Lesson Learned
Detailed contract analysis to ensure all aspects have been delivered.SLA education is undertaken with the live project team.Washup and Lessons learned session.

Key Tools	
Smartsheet (Project Management)	www.smartsheet.com login will be advised
Workflow Documentation	Available in Share Point
Secure Microsoft Share Point Link	Handover Documentation
Contract Documentation	
Zendesk	