Creative Software Solutions (Europe) Limited Pro-Cloud Onboarding

This Onboarding process was updated May 2019.

Introduction to CSS Onboarding Philosophy

The Onboarding process for all CSS products is to help new users get acquainted with all the features of our product. The flow of your onboarding process will depend on each user's specific needs.

Our objective is to **empower our customer by providing them with all the resources to onboard autonomously**. We hope to carefully guide customers and their users to gain their first win and to go on and find productivity and efficiency each day.

To be successful this must be an engaging, productive, efficient, collaborative, rewarding and enjoyable process for all involved.

The CSS OnBoarding Methodology

Method

The CSS On-boarding methodology focusses on workstreams tasked to work on and deliver a part of the project. These workstreams work in conjunction with the Pro-Cloud Bridge along with written workflows specific to your implementation.

Project timeline underpinning is also supported by our online project management tool enabling real-time collaborative updates and communication. SharePoint areas are made available for secure file sharing for the duration of the onboarding process.

The Key Stages in summary are:

I.   Mobilisation and Implementation
    a.   Project Management
    b.   Information Governance and Security

II.   System Configuration
    a.   Business Discovery
    b.   System Data Templates

III.   System Acceptance (Signed Phase)
    a.   User Acceptance Testing

IV.   Training (Signed Phase)
    a.   Prescriber Champions Training
    b.   Pro-Cloud Training
    c.   Pre-Launch Trials (UAT)

V.   Live System Configuration
    a.   Data templates import
    b.   Live Data Migration
    c.   Ready to Launch (Signed Phase)

VI.   Launch
    a.   Launch Week Support

Key Tools	
Pro-Cloud Bridge	http://pro-cloud.org/wp-content/uploads/2019/09/CSS-108-Pro-Cloud-Bridge-Poster.jpg

Mobilisation and Implementation

Purpose

This Phase is a meeting to kick-off the project.The CSS sales team at this stage handover the day to day management of the contract to the onboarding team post this meeting.The meeting will also discuss the implementation program and initialise workstreams toward project completion.

- Method: Zoom Conference Call Service (see Key Tools section)
- Agenda: (see Key Tools section)
- Duration: Maximum 2 hours
- Delegates: Key Project Team

Project Management

This key 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. Meetings will be available via the Sharepoint site with email notification circulated to inform all project members
- 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
- Key phases of the project are signed off prior to the next stage commencing. The project plan will indicate signoff

Phase 1

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.

Meeting Outcomes
CSS Sales Actions

The CSS sales team will work with the onboarding team and customer post initial discovery to ensure all contract compliance is met. Any outstanding contractual documents will be submitted along with certificates etc by the commercial team.

CSS Onboarding Actions

The onboarding team will make available the following

- Amended Project Plan
- Data Templates
- Supporting Project Documents
- Access to Pro-Cloud Website

Customer Actions

- Confirm dedicated team details

  - Name
  - Email
  - Role

- Confirm Access to Sharepoint
- Confirm Access to Pro-Cloud
- Review and Acknowledge Amended Project Plan
- Confirm Availability of dedicated Project Team

stages and its link to a future phase.

- Confirm Supporting materials from CSS have been reviewed including the Risk Planning and Mitigation Document

Key Tools	
Zoom Conference Call Service	https://zoom.us/test
Risk Planning and Mitigation	http://pro-cloud.org/wp-content/uploads/2019/09/CSS-Implementation-9-Mistakes-web.pdf
Digital Signoff from Smartsheet	Via Email Notification
Secure Microsoft Share Point Link	The link will be advised
Smartsheet (Project Plan)	Link will be circulated via Share Point
Project Timeline	http://pro-cloud.org/wp-content/uploads/2019/10/CSS-52-Pro-Cloud-Standard-Timeline.jpg
Data Templates	Available in Share Point
Pro-Cloud Modules and Services Map	http://pro-cloud.org/wp-content/uploads/2019/10/CSS-58-Pro-Cloud-Modules-and-Services-Map.pdf

Pro-Cloud Platform Configuration

Pre-Business Discovery Walkthrough
Purpose

To provide a system overview which will assist in the 20% completion of the data templates.

- Method: Webinar Walkthrough
- Date: To Be Agreed
- Duration: 2 Hours per platform. Sessions may be held on the same with breaks or over 2 separate days.
- Areas Covered: TCES Community and Pro-Cloud
- Delegates: Key Project Team

Business Discovery

This stage seeks to identify specific setup information that is pertinent to the customer needs. It is information that helps assist configure the system in the "adopt As-Is" or "To-Be" approach. The opportunity to evolve and change inefficient business practices is also explored.

- Method: Face to Face
- Date: To Be Agreed
- Duration : 2 Days
- Areas Covered: TCES Community and Pro-Cloud
- Delegates: Key Project Team, Expert End Users

Phase 2

System Data Templates

The data templates are released post the mobilisation meeting. The approach CSS take is based on the 80/20 rule in project implementation. We advocate the completion of the templates with 20% of the data provided to set up the UAT environment.

This platform is used for User Acceptance, Training and Continuous Improvement during the life of the contract and information provided here will simulate 20% of the actual Live environment.

When a customer first enters our portal, there will be features without any data. We aim to quickly fill these empty states with useful and actionable content to explain what the feature is, demonstrate its value within the day to day environment, and encourage users to start using the application.

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

Meeting Outcomes

CSS Onboarding Actions

Networking

Networking and whitelisting are also handled in this phase through discussions with local customer IT teams.Speed and reliability testing commences.

The onboarding team will provide ongoing support in completing the templates as well as

- Initial Site Configuration and Test with Client Network / IT Lead
- Hardware Configuration
- Provide Business Discovery Form for completion
- Provide Process WorkFlow Materials

Customer Actions

The customer will be required to complete

- No More than 20% of all Data Templates
- Complete Business Discovery Form
- Undertake and confirm Network access to Pro-Cloud and TCES Community

Key Tools

Network Test Tools	In-Built within Pro-Cloud
Secure Microsoft Share Point Link	The link will be advised
Smartsheet (Project Management)	Available in SharePoint- Reference Phase 2 target completion dates
Workflow Documentation	Available in Share Point

User Acceptance Testing (UAT) (Iterative)

Non-Production UAT Platform

Using our non-production UAT platform configured to 20% actual Live environment settings, CSS can provide a real-life experience of the final system during the phases of implementation.

The phases include;

- Pro-Cloud System User Acceptance
- Prescriber System User Acceptance

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 accreditations.

Digital Customer Signoff Milestone Phase 3

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 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.

Empty States

When a customer first enters our portal, there will be features without any data. We aim to quickly fill these empty states with useful and actionable content to explain what the feature is, demonstrate its value within the day to day environment, and encourage users to start using the application

Key Tools

Secure Microsoft Share Point Link	The link will be advised
Smartsheet (Project Management)	Available in SharePoint- reference Phase 3 for milestones
Workflow Documentation	Available in Share Point

Pro-Cloud Configured Solutions Training

Digital Customer Signoff Milestone Phase 4

TCES Community Webinar-based Training

Method: Zoom Webinar Facility
Duration: 2 hours per session
Number of Sessions: To Be Agreed
Delegates: Open InvitationOur improved digital training service ensures we can provide a webinar-based training session to a bigger group of end users.The objective is to facilitate a wider audience without limiting attendance. CSS promote this to also reduce environmental impact through travelling whilst achieving economic savings in training costs.

User Training by Champions

Method: Face-To-Face
Duration: Customised
Number of Sessions: 3 Days
Delegates: Closed Invitation – Selected Service Area ExpertsPro-Cloud Module by Module, Role Play User Training champion led (not exhaustive)

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

TCES Community Champions Training

Method: Face-To-Face
Duration: 2 hours per session
Number of Sessions: To Be Agreed
Delegates: Closed InvitationSpecific considerations apply here with detailed documents assisting in making the right decisions and detailed planning with regards to training. This includes but is not limited to:

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

- 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.

them some assurances of the new system whilst reducing normal anxiety experienced in the introduction of a new system.

Key Tools

Training Booking Concierge Service	Made Available Via Share Point
Smartsheet (Project Management)	Available in SharePoint- reference Phase 4 for Key Dates
Workflow Documentation	Available in Share Point
Training Site & Documents	Link made available

Pro-Cloud Live System Configuration & Pre-Launch Trials

Phase 5

Data Templates Import

At this stage, the completed data templates are submitted to CSS with the prefix file name of FINAL.CSS will acknowledge receipt and confirm completion of import to enable the customer to undertake sample checks.Live Data Migration

Live Data Migration

Migration of data should be done with the involvement of the Data Controller's representative and not solely by the incumbent. It is the responsibility of the Data Controller to ensure that the migrated data complies with Data Governance. Data Assurance targets should ensure that where applicable;

- Deceased Clients are not migrated to the new system;
- Data accuracy is at optimum.
- Data reference is in line with guidelines e.g. datasets, for example, Gender and Title references.

Test Cut

On Completion of DPIA requirements, CSS would want to receive and review an extract of the data to be imported – the "test cut".

By working on the test-cut issues can be identified and the customer is given the opportunity to rectify it prior to submitting the final copy.

Data In Count

Data sets are counted before import and post-import through DBA checks, data is checked for data type appropriateness, i.e. date formats, monetary formats etc.

Pre-Launch Trials

Extensive and exhaustive role-based trials are undertaken post data migration in collaboration with customer project teams to ensure system and data operate in unison.

Any data issues identified in the final cut will result in the file being rejected until resolved.

Key Tools	
Smartsheet (Project Management)	Available in Share Point- Reference Phase 5 updated completion schedule
Workflow Documentation	Available in Share Point
Secure Microsoft Share Point Link	Data Files

Launch Phases

Phase 6 (Digitally Signed Phase)

Customer Validation

On completion of data imports and pre-launch trials, validation checks are undertaken by CSS's 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)	Available in SharePoint- Reference Phase 6 for confirmed Launch Date
Workflow Documentation	Available in Share Point
Secure Microsoft Share Point Link	Data Files
Zendesk	Support Tickets

Project Signoff

Phase 7 (Digitally Signed Phase)

Signoff Exercise and Documentation

CSS will undertake a Project Signoff exercise post-launch and no sooner than 30 days after 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.

Purge Data

Post-off-boarding data migration, CSS will hold the data in an "at-rest" state for a period of no more than 3-months. This enables the customer to confirm the data has been migrated correctly and no need for remedial migration and the data can be purged in compliance with Data Retention and Governance regulations

Contract Review, SLA Educate, Washup and Lesson Learned

Detailed contract analysis to ensure all aspects have been delivered.SLA education is undertaken with the project team.Washup and Lessons learned session.

Key Tools

Smartsheet (Project Management)	Available in SharePoint- reference Phase 7 for confirmed signoff dates
Workflow Documentation	Available in Share Point
Secure Microsoft Share Point Link	Handover Documentation
Contract Documentation	
Zendesk	