GOING LIVE WITH ENTERPRISEWIZARD

A STEP BY STEP GUIDE

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CHECKLIST TO GO LIVE WITH ENTERPRISEWIZARD

We have prepared this checklist to help organize the process of putting your new EnterpriseWizard system into production use. Put a mark (e.g. ✓) in the "Done?" column when each step has been completed.

GENERAL CUSTOMIZATION AND CONFIGURATION

Done?	Assignee	Action Item
✓		Create Teams and Groups for users
✓		Do all table and field customization of the system
✓		Configure any automation-- rules and workflow – for notifications and escalations
		Set up saved searches, views, and reports for end users and staff users for each table
		Configure the End User Interface – define any FAQs and the searches to be used for My Items for each table
		Customize the color schemes and Home tab text for the End User Interface (Setup/Look & Feel/Manage End User schemes) and for the Staff Interface
		Set up the default outbound email account for the system, and define the outbound and inbound email accounts for each table. If the inbound accounts are being used with your current system, do not provide the real password when setting up the accounts, just set them up as dummy accounts so as not to redirect email into EW until you are ready. You may want to set up some test accounts with real passwords to test inbound email during the testing phase.
		Make final edits to the texts for outbound emails being sent by rules for each table, by going to Setup/Email/go to rule/workflow emails and selecting the relevant tables.
		If using LDAP or ADS, set up the access and mapping for your LDAP users. Do not sync them yet or import them.

DOCUMENTATION

Done?	Assignee	Action Item
		Prepare documentation of the rules and setup for each table, for maintenance purposes. Print out or save to a file a printout of the group permissions. You can also print out rules from the rules screen, but the printout does not provide details of the if-then-else actions.
		Prepare Admin Maintenance Documentation describing the critical dependencies in the system and how to maintain the various background components of the system, such as team naming conventions, managing choice list changes, assignment rules, etc.
		Prepare a training presentation or "how-to" manual for your staff users and, optionally, for your end users. EnterpriseWizard provides a generic staff training presentation in powerpoint format that can be customized with your process instructions.

DATA IMPORT AND RECORD CREATION

Done?	Assignee	Action Item
		Import data for all the background source tables, such as Companies, Assets, Locations, and so on.
		Import staff users from excel or ASCII, without their email addresses so they will not be spammed (unless you are ready to have them start testing the system). Save a copy of an excel sheet with the login and email addresses of all users for a later update/import.
		Import end users from excel or ASCII, without their email addresses. Save a copy of an excel sheet with the login and email addresses of all users for later update/import. If using LDAP, you can do an initial sync at this point, and then we recommend deleting the email addresses so that you do not accidentally spam the users. Once LDAP users have been imported, you will need to edit the groups and teams for the staff/technician users to the appropriate values in EW.

Done?	Assignee	Action Item
		If you will be using the FAQ interface, create some FAQs and/or standard solutions in the appropriate tables. These can be imported from excel if they already exist in another system.
		Import all data that is not time-sensitive, i.e. it is not being currently worked on and updated in another system.
		Manually create records in tables that will hold new data that does not already exist in your backend systems and that will be used as source data for other tables.

TESTING

Done?	Assignee	Action Item
		Create a login page on your intranet for testing users to login.
		Create some test users, one per group, and belonging to the key teams. Provide them with unique email addresses, for instance, addresses as gmail or yahoo.com. Note that testing with the same email address being used for multiple users can lead to some unexpected results if you interact with the system by email.
		Test the system by logging in as a test user belonging to each group and going through the use case scenarios for that kind of user. Check that the use case process flows actually work the way you need them to, and test that the automation works the way you expected.
		While logged in as each user, check the tabs you can view, the fields you can view, the actions you can perform on each kind of record, and so on, to be sure the group permissions are defined the way they should be. Make a list of all changes that should be made to the field level, record level, and menu permissions, and then make those changes once the first round of testing is complete.
		Test the LDAP logins and integration on a couple of end users to be sure everything will work for them as you expect.

Done?	Assignee	Action Item
		If you are enabling record creation from inbound email, test sending email to the system to a test account and be sure it is processed as expected. Be sure that hyperlinks contained in outbound emails that should open up records for editing when clicked work as expected for all types of users.
		If your system includes any integration with backend systems, test the integration behavior.

TRAINING

Done?	Assignee	Action Item
		Train your internal staff/technician users in how to process records in the system. Note any difficulties they have and listen to their feedback. It is not too late to make cosmetic and simple changes that will make the system easier for them to use. For instance, changing the layout is easily done if they prefer to see fields in a different arrangement.
		Provide any necessary training to your end user population
		Make any changes or improvements to the system suggested by staff during the training

FINAL PREPARATIONS FOR GOING LIVE

Done?	Assignee	Action Item
		Be sure you have a valid license for all of your staff and end users installed.
		Delete all the test records that were created during testing.
		Do an update import of users to map their email addresses. If using LDAP, do a sync of users, being sure not to overwrite the groups and teams of staff users.
		Create a login page for your end users and staff users or incorporate a login block for EW into your main support page or a page at your website.

Done?	Assignee	Action Item
		Import any active and archival records from any pre-existing system into EW and turn off access to the old system, redirecting users to the login page for EW.
		Redirect any inbound email into EW for all active email accounts that were being used to receive requests and updates from users.
		Announce the new system to your end users and staff via a mass email (which can be sent from EW) or via your website.
		Monitor system usage closely during the first days to see how things are going and collect feedback from staff users on the frequency of email notifications, any difficulties in the processing of records, and so on. Schedule a feedback session 2 or 3 weeks into using the new system to allow staff users to suggest any adjustments, and make any changes that are reasonable and easy, to increase their pleasure in using the new system.