VelocityEHS

Flexible Implementation Services Description

This Flexible Implementation Services Description document was last updated on July 31, 2019.

Implementation Tasks & Deliverables

The section below outlines the Flexible Configuration Implementation Process from Project Kick-Off to Project Closure.

Planning

Establishment of Dedicated Project Team

For VelocityEHS, each project is assigned the same resources no matter the project size, module(s) or Customer industry. For the Customer, we recommend engagement of a minimum of two decision-makers from the appropriate team(s)/department(s) as well as a dedicated Project Manager or Business Analyst.

The table below captures the ideal project team structure for implementation of a project with VelocityEHS.

Table 1: Recommended project team members

Team	Core Project Team Members	Supporting Resources
VelocityEHS	Project Manager Implementation Consultant Implementation Specialist	IT Manager Business Development Manager Client Care Manager Product Manager Customer Success Manager Director of Operations
Customer	Project Manager/Business Analyst Health and Safety Manager Environmental Sustainability Manager Site/Facility Manager(s)	IT Representative HR/Legal Representative Facility & Corporate Level EHS Champions Finance/Contract Management Representative Administrative Assistant Sr. Management or Executive Sponsor

Decision Makers will be referenced throughout the document at key milestones in the project implementation process where Customer sign-off is required.

Project Kick-Off Meeting

The Kick-Off Meeting is the first official meeting for every VelocityEHS implementation. The agenda for the kick-off meeting includes the following topics for discussion:

- Introduction of Project Team Members
- Scope of Work Review

- Communication Method & Frequency Preferences
- High Level Delivery Timeline Expectations
- Project Objectives & Success Criteria
- Next Steps

Determination of High-Level Delivery Timeline

The VelocityEHS Project Manager, following Kick-Off, will start working to identify options for any on-site sessions including Implementation Planning and Super User Training. These options will be presented to the Customer, so that they may indicate their availability and resources on both project teams can be scheduled for the preferred dates. Target timelines for Beta Delivery and Go Live will also be established at this juncture. This enables VelocityEHS to schedule deployments, and the Customer, to start working on a roll-out strategy and internal communication plan as needed.

Review of Initial Survey & Collection of Supporting Artifacts

Immediately following the Kick-Off Meeting, the VelocityEHS Implementation Consultant will send a Survey document to the Customer for completion. The purpose of the survey is to solicit fundamental information in advance of the on-site Implementation Planning Session (IPS). This helps the VelocityEHS team to start building an understanding of the Customer's business, structure and objectives and thereby ensures that appropriate topics and questions are addressed during the planning stage of the project. Survey questions are straightforward and should not require extensive effort to complete.

Sample survey questions include:

- Select which model best describes your organizational structure.
- What is the current method for maintaining employee records?
- What is the source of labor data?
- List the agencies that incidents may be reported to or that drive compliance tasks?
- Is an established method of assessing risk or severity used?
- Indicate who will be using the software (check all that apply).

Through the Survey, VelocityEHS also requests the Customer to share any relevant documentation or "artifacts" that will help inform the implementation.

Data Import and Integration File Formatting

If data importing and/or integration is included in the scope of the project, VelocityEHS will initiate the process of formatting relevant files. Typically, there are three import and integration files that are formatted at this early stage in the project. These include the Location Tree Import, User Integration, and Labor Hours Import.

The Location Tree is the backbone of the VelocityEHS application as it is a key parameter for all data entered into and extracted from the application. Based on initial feedback provided in the Survey, VelocityEHS will consult with the Customer to determine the correct structure for the Location Tree. The Customer will be required to provide a full location path for each location from the highest to the lowest levels of the tree. The initial set up of the structure of the Location Tree is included within the scope of this project; VelocityEHS provides an experienced Consultant to guide the Customer through the location tree design. Administrators can add, remove and change locations through configuration, however changes to the fundamental structure of this Location Tree after initial set up may require data manipulation that can be made available on a time and materials basis. While it is technically possible to change the Location Tree structure, there are a number of location-dependent configuration modifications made for each implementation which require significant effort to alter once established. Furthermore, once the Production instance has been launched, data may be entered which is associated to location. Once real data is entered into the application, any alteration to the Location Tree would require data manipulation/mapping to relocate data points accordingly.

On-Site Implementation Planning Session
An on-site Implementation Planning Session (IPS) with the Customer project team members will be facilitated by a VelocityEHS Project Manager and Implementation Consultant. This session's main goals are to ensure VelocityEHS has a complete understanding of the Customer's overall project objectives and the needs that must be fulfilled in order to achieve those objectives. The secondary objective of the session is to ensure that both project teams have a clear understanding of the process for implementation, delivery expectations and respective team responsibilities. The agenda for the session specifically includes the following items:

- Introductions & IPS Objectives
- Project Goals
- Business Needs Discovery
- Workflow Review
- Reporting Needs Analysis
- Security Needs Review
- IT System Requirements
- Project Implementation Planning

The VelocityEHS Project Manager will document and compile notes from the IPS for reference in the business needs documentation process.

Analysis
Business Needs Documentation
The VelocityEHS Implementation Consultant will document Business Needs based on the content of discussions at the on-site IPS. Documented needs will be reviewed with the Customer to ensure accuracy before progressing to solutions documentation and technical design. The process ensures that the criteria for acceptance of the implemented VelocityEHS solution relate back to the project team's objectives and add value to the business. Designated Decision Makers will be asked to provide written approval of the Needs documentation before progressing to solutions design.

Import File Formatting
At this stage in the implementation process, VelocityEHS will initiate the process of formatting any other import files which are required to accomplish documented Business Needs and that are included in the scope of the project.

Initiation of Recurring Status Update Meetings
Recurring half-hour meetings are optional, but recommended by VelocityEHS as they provide the project teams with a standing opportunity to update on invoicing, timeline tracking, outstanding or open items for discussion, emergent risks, milestone achievements, and next steps. Status Update Meetings are initiated following the IPS, as there are typically a lot of important decisions that need to be made and information that needs to be exchanged at this stage in order to arrive at an approved, comprehensive set of technical solutions and plan for implementation.

Time allowing, Status Update Meetings may be used to provide ongoing support on client-led tasks throughout the project such as preparations for Super User Training and Go Live/Roll-Out Planning.

Design

Solutions & Acceptance Criteria Approval

Approval of the Business Needs documentation triggers VelocityEHS to begin technical solution design. The solution documentation includes classification of items as "software out-of-the-box", "software with modification", "software with administrative set-up", "manageable through business processes and training", or "product feature suggestion". Each of these classifications are defined below:

Software Out-of-the-Box: Solution requires no modification to the core product.
Software with Modification: Solution requires configuration of the default product.
Software with Administrative Set-Up: Solution requires no configuration of the default product; modification through core administrative interfaces is required by designated System Administrator in order to implement solution.
Manageable through Business Processes/Training: Solution cannot be fully met through the default product or through configuration; successful roll-out of the solution requires introduction and/or awareness-raising of relevant internal processes in order to meet documented Business Need.
Product Feature Suggestion: Solution cannot be met through configuration and there is a demonstrable Business Need for a feature or function which is not currently available in the core product. Feature Ideas will be documented by the Implementation Consultant and submitted to the VelocityEHS Product Team for assessment.

An estimate of effort is provided with each solution presented to help inform decision-making. Once solution documentation has been completed, the full solution-set proposal will be reviewed with the Customer and finalized for Decision-Maker approval.

The finalized Needs and Solutions document includes a number of Appendices. In addition to Import and Integration files, the package includes Security Permissions and List Items, modified in accordance with the approved solutions. List Items may be configurable or editable through system administration.

Finalization of the Project Budget & Implementation Plan

Approval of the Needs and Solutions document enables the VelocityEHS Project Manager to finalize the Project Implementation Plan, including any necessary updates to the project delivery timeline and budget allocations. The Implementation Plan outlines VelocityEHS's Change Management process, notes any identified risks to the project and established mitigation measures, and details the project's communication strategy including key contact information.

Development

Technical Design Criteria Writing

The VelocityEHS Implementation Specialist's first step before diving into development, is to write down each configuration change that must be made in order to successfully achieve a solution. These Design Criteria are reviewed internally with the Implementation Consultant to ensure that there are no gaps between Solution Acceptance Criteria and Design Criteria.

Beta Configuration & Quality Assurance Testing

The timeline for Beta Configuration will be established in the Project Implementation Planning stage of the project, following Solutions approval. Internally to VelocityEHS, that timeline is further broken down into time dedicated to design criteria drafting, configuration, and Quality Assurance testing. VelocityEHS performs 3 levels of Quality Assurance testing prior to release. The standard stages of Quality Assurance Testing are:

1. **Design Testing**: conducted by an Implementation Specialist to ensure that all documented Design Criteria have been implemented and that no bugs were introduced in configuration
2. **Acceptance Testing**: conducted by the Project Manager to ensure that all documented Design Criteria have been implemented and that no bugs were introduced in configuration and to verify that approved Acceptance Criteria are met by configuration
3. **Verification Testing**: conducted by the Implementation Consultant to ensure that the approved Acceptance Criteria are met by configuration and to ensure that the implemented solutions meet the project objectives as set by the Customer

Super User Training Preparation
VelocityEHS applies a train-the-trainers approach to application use and system administration training. In the weeks preceding training, VelocityEHS will deliver a tailored Super User Training Agenda and will confirm attendees for the on-site session(s). Training recipients should include core project team members, any individuals who will be responsible for system administration, and, broadly, any individuals who will be responsible for cascading internal training to the next tier of trainers. The number of attendees is limited to 10 persons per VelocityEHS trainer.

Beta Deployment Scheduling Confirmation
While the date of Beta deployment will have been tentatively set in the Project Implementation Planning stage, the VelocityEHS Project Manager will coordinate with the Customer to confirm the date and time of Beta Deployment based on configuration progress and training scheduling.

Completion of First Run of Imports & Error Reporting
If included in the scope of the project, the VelocityEHS Implementation Specialist will run all import files during the Beta Configuration stage once all necessary configuration – such as enabling fields needed to contain imported data – has been completed. An error report will be generated for each import and returned to the Customer for correction. Time allowing, the corrected import files will be re-run prior to Beta Deployment.

Delivery
Beta Deployment to Training and Production Environments
Beta deployment will be released to two identical "instances" or "environments": Training and Production. Each environment has a distinct URL. The training environment is primarily used for client-led Acceptance Criteria testing, training, exploration of different ways to leverage features in the application, and ongoing practice activities. The production environment is conversely intended for entry of real data only. VelocityEHS releases Beta to the Production environment at this time so that if there is an opportunity to complete any administrative set-up ahead of Go Live, the Customer will be able to do so.

Notification of Beta Deployment will be accompanied by Release Notes which detail all modifications included in the release. The VelocityEHS Project Manager will have scheduled a web-session with the Customer in advance of the deployment, the purpose of which will be to walk through the release documentation, and to demonstrate implemented solutions in VelocityEHS.

On-Site Super User Training
A qualified VelocityEHS Trainer will be provided at a ratio of one (1) trainer for every ten (10) trainees. The trainer will deliver instructor-led training on all relevant modules, system administration, reporting

and dashboards. Practical exercise sessions will be facilitated in the Customer's training environment each day as well.

VelocityEHS recommends training be conducted at this stage in the project for a number of reasons. Firstly, team members involved in training are likely also responsible for testing the application and providing feedback to VelocityEHS for Post Beta configuration. Training in advance of testing ensures that testers are comfortable navigating the application and have a foundational understanding of expected behaviors. This, in turn, reduces the number of false bug/issue reports included with testing feedback. Secondly, having the opportunity to build proficiency in the VelocityEHS application at this stage allows the Customer ample time to develop an appropriate training plan, Go Live communication strategy, materials for end user training and to begin setting up the Production environment for eventual roll-out.

User Acceptance Testing

User Acceptance Testing (UAT) provides the Customer with an opportunity to validate the success of the Beta deployment with direct reference to the approved Solutions documentation. VelocityEHS will provide a User Acceptance Testing (UAT) Log template to the Customer for consolidation of UAT feedback by the Customer. The log requires only three pieces of information: item description, module and component. The Customer will work with VelocityEHS to determine how much time is needed for complete testing of the Beta delivery; the acceptance testing period usually spans no longer than 1-2 weeks depending on the Customer project team resource availability and project complexity or size. VelocityEHS requires the log to be reviewed by the Customer Core Project Team and signed-off on by Decision-Makers prior to being shared with VelocityEHS. This level of review is needed to eliminate duplicate issues reported by testers, to clarify incomplete reports, and to ensure that all items logged are of interest to the business as a whole for further exploration with VelocityEHS.

The Customer will be asked to provide the completed UAT log to VelocityEHS by the end of the day on the final scheduled date for UAT. This allows the VelocityEHS Project Team to conduct an initial review of the log and document any questions for follow-up during the scheduled UAT Review web-session. Core Project Team Members, including Decision-Makers, are asked to attend the UAT Review meeting. During this session, VelocityEHS will review each line of the feedback log with the Customer, discussing solutions/proposed resolutions for each item. Each logged item will also be analyzed to determine if its inclusion has impact on the project budget or timeline.

The image below provides a sample of the User Acceptance Testing (UAT) Log format and content.

User Acceptance Testing (UAT) Log — **PROJECT:**

#	Description	Module	Component	Classification
001	Change 'Relationship of Person Involved' field label to 'Parties Involved'	Incident	Person Involved	Change
002	Create Search View for Standalone Corrective Actions	Actions	n/a	Feature Suggestion
003	Scope of Audit field missing from Audit Information	Audit	Description	Configuration Bug

Post-Beta Configuration & Quality Assurance Testing

The timeline for Beta Configuration is established during the Project Implementation Planning stage of the project; however, it will be re-assessed once the list of UAT feedback items for inclusion with Post Beta development has been evaluated and accepted by both VelocityEHS and the Customer. The standard Quality Assurance Testing process is repeated for all UAT items to be included in the Post Beta release and again, the specific date/time of Post Beta release will be coordinated with the Customer in the weeks preceding the scheduled timeline for deployment.

Go Live Planning
The VelocityEHS Project Team will support the Customer with preparations for Go Live/Launch of VelocityEHS corporately. A number of roll-out approaches may be considered and the VelocityEHS Project Team will be available to advise how to execute whichever approach best suits the Customer from a technical and administrative perspective. The most common tasks requiring support from VelocityEHS at the Go Live moment are role assignments, set-up of notifications, dashboard design and manual data input.

Post-Beta Deployment to Training and Production Environments
Post Beta configuration will be released to both the Training and Production environments. Notification of Deployment will be accompanied by Release Notes detailing all modifications included in the release. The VelocityEHS Project Manager will have scheduled a web session with the Customer in advance of the deployment, the purpose of which will be to walk through the release documentation and to demonstrate implemented solutions in VelocityEHS.

This deployment is the final deployment to the Customer’s instances in the project implementation process.

Administrative Setup Support Provided
Administrative setup of user roles, notifications and dashboard(s) for Go Live, if not started already, is triggered by the Post Beta deployment. The VelocityEHS Project Team will support the Customer with these tasks as well as any other manual data entry required to be in place in advance ofroll-out. VelocityEHS’s role at this stage will be to offer guidance based on the documented business needs to ensure that key pieces of information are accurately entered to accomplish the described needs and objectives.

The Customer will need to nominate a Global System Administrator to manage these tasks and to take on the responsibility of the position moving forward. The System Administrator will be the primary point of contact for all the Customer’s users and the counterpart of the VelocityEHS Support Team Members on any future support matters.

Automated Integration Connections Setup
If data integrations are in scope of the project, VelocityEHS will set up an integration point using Secure File Transfer Protocol (SFTP) for the Customer allowing for secure transfer of employee information and automation of user profile data updates to the Production environment. Either the VelocityEHS Project or Support Team will help the Customer to determine the frequency at which the Customer will be transferring updated User Integration Files and will provide guidelines and transfer information required to accomplish the task.

Go Live/Support
Implementation Acceptance and Transition to VelocityEHS Support
In the 2-3 weeks following Go Live, the VelocityEHS Project Team will continue to provide support to the System Administrator with roll-out while initiating the process of transitioning the Customer’s main point of contact from the Project Team to the VelocityEHS Support Team. A call will be scheduled for the

Customer with the Client Care Manager to review the details of the Support Contract and available services.

Lessons Learned Discussion Held
VelocityEHS is committed to providing the highest level of service to our Customers. At the close of each project, the VelocityEHS Project Team engages all relevant Core Project Team and Supporting Resources to reflect on the success of the project both from a project execution and solution implementation standpoint.

An optional Lessons Learned discussion will be scheduled with the Customer as well to solicit feedback and identify opportunities for improvement in future interactions.

Post-Go Live Success Meeting
A Success Coach will reach out the Customer within 60-90 days of Go Live to check in and see how things are going. The Success Coach will facilitate a reflection on project objectives and how those have been or are being achieved with VelocityEHS, lead a discussion on usage statistics and trends since roll-out, and document any identified opportunities for VelocityEHS to help enable and promote future expansion of the Customer's EHS program. The Customer Success team will conduct these reviews at regular intervals throughout each year to ensure the Customer's users have the best experience possible with VelocityEHS.