VelocityEHS

Simple Implementation Services Description

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

Implementation Tasks & Deliverables

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

Planning

Establishment of the Implementation Team

The VelocityEHS implementation team will be made up of a Project Manager, Implementation Consultant and Implementation Specialist. We recommend engagement of a minimum of two decision-makers from the appropriate department(s) as well as a dedicated Project Manager to make up the Customer's team.

The table below captures the ideal implementation team structure.

Table 1: Recommended Team Members

Team	Core Team Members	Supporting Resources
VelocityEHS	Project Manager Implementation Consultant Implementation Specialist	Business Development Manager Client Care Manager Customer Success Manager
Customer	Project Manager Health and Safety Manager and/or Environmental Sustainability Manager	IT Representative HR/Legal Representative Facility & Corporate Level EHS Champions Finance/Contract Management Representative Sr. Management or Executive Sponsor

Kick-Off Meeting

VelocityEHS will facilitate a kick-off call with all core implementation team members. The purpose of this call is to introduce team members, to overview the implementation process, to establish implementation success criteria and for the VelocityEHS Implementation Consultant to initiate the process of gathering required information for system setup.

Determination of High-Level Delivery Timeline

Following kick-off, VelocityEHS will provide scheduling options for all on-site visits so that the Customer may indicate preference and ensure availability of core team members to participate. 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

A simple survey will be sent by the VelocityEHS Implementation Consultant following the kick-off call to solicit specific information which will inform the content of preliminary consultations as well as Alpha site configuration/set-up ahead of the on-site Implementation Workshop.

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 client to provide any relevant documentation or "artifacts" that will help inform the implementation.

Responses to the survey will determine the number and content of remote consultations that will need to take place in advance of the Implementation Workshop. At minimum, three (3) meetings will be held between the kick-off and on-site Implementation Workshop to discuss the Survey responses, determine the Location Tree Structure, and to determine/support completion of the User Integration file format.

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.

The User Integration file is also critical as it determines how users will login to VelocityEHS, how they will be identified in the application, and what profile information will be accessible to administrators of the application. The User Integration file most commonly includes the following information fields:

- User ID
- Email Address
- Location
- Employee Number
- Job Title

- Date of Hire
- Supervisor
- In/Active Status

Other fields may be supported as needed. The VelocityEHS Implementation Consultant will also work with Customer to determine how each user will be uniquely identifiable within the system.

Labor hours are imported to enable rate calculation for reports and dashboards. The Project Teams will discuss the appropriate level of collection and entry based on the established Location Tree structure and desired reporting capabilities. It is recommended that collection and formatting of any other import data included in the scope of the project be deferred to follow the on-site Implementation Workshop.

Automated Integration Connections Setup
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

Development
Initial Configuration
VelocityEHS will complete initial configuration based on survey responses prior to coming on-site Implementation Workshop. At minimum, initial configuration includes set up of the Location Tree structure, configuration of the user onboarding process and addition of the customer's logo to the login page. If sufficient information has been provided and time is allowed, VelocityEHS may make other minor configurable modifications in advance of the Implementation Workshop.

On-Site Implementation Workshop
The VelocityEHS Implementation Consultant and an Implementation Specialist will travel to a destination of the Customer's choosing where they will facilitate on-site Implementation Workshop. Attendance of core implementation team members is required, though up to ten (10) attendees are allowed. The primary objectives of the Implementation Workshop are i) to develop a comprehensive understanding of the business needs which drive configuration and administrative set-up requirements and ii) to complete configuration of the documented requirements while on-site. By the end of the Implementation Workshop, the Customer will have a fully functional system deployed to both the Training and Production environments. This release and completion of the Implementation Workshop marks the achievement of the Beta Delivery milestone.

Data Import and Integration 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. Customer will be responsible for gathering, cleaning and formatting all data in the VelocityEHS -provided template. Imports may be run a total of 3 times in a project's implementation, including a test import of data (sample or full), a test import of corrected data (sample or full), and an import of all clean data including any deltas between the first run and Go Live. Following each of the first two test runs, VelocityEHS will provide an error report to guide any necessary corrections.

On-Site Super User Training

VelocityEHS applies a train-the-trainers approach to application use and system administration training. In advance of the on-site Training Session(s), 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 ten (10) persons per one (1) VelocityEHS trainer.

While on-site, 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 so that Super Users may gain hands on experience in the system.

Administrative Setup

The Customer will need to nominate a Global System Administrator to complete Administrative Setup tasks and to take on the responsibility of the position moving forward. Following Go Live, the System Administrator will be the primary point of contact for all the Customer users and the counterpart of the VelocityEHS Support Team Members on any future support matters.

At this stage of the implementation, the System Administrator will work closely with the VelocityEHS Implementation Consultant, to set up user roles, list items, notifications and to design the global dashboard. The System Administrator, as well as other users assigned the appropriate roles within the application, will be able to complete other module-specific setup tasks at this time as well.

As needed, the VelocityEHS Implementation Consultant will offer guidance to ensure that key pieces of information are accurately entered into the system to accomplish the communicated business needs and objectives. Tailored Administrator and Modular Guides will be provided for ongoing reference.

Final Configuration & Deployment

Following Super User Training, the VelocityEHS Implementation Consultant will conduct a review of the implementation focusing on any requirements outstanding for configuration prior to Go Live with the core implementation team. Any existing requirements which were not released with the Beta deployment as well as any identified configuration bugs will be included in the Post Beta deployment. Any new requirements introduced by the customer at this stage of the project will added to the requirements documentation and assessed for impact and feasibility within the given project timeline and budget. The full list of items to be included in the Post Beta deployment must be approved by the Customer decision-maker(s) before VelocityEHS will configure and release the items. This list of items is the final list of modifications that will be made within the course of the implementation.

Once approval has been communicated, the Implementation Specialist will configure these final items for release to the Customer's Training environment. Data import files, if included in the scope of the project, may be fully cleaned and ready for inclusion in the Post Beta release; optionally, imports may be completed following Go Live.

Implementation Acceptance & Final Deployment

The Implementation Consultant will remotely walk through each of the final modifications that have been implemented. At the conclusion of this walkthrough, VelocityEHS will confirm with the Customer

that all documented requirements have been met. The Post Beta release will be pushed to the Production environment at which point both environments are considered Go Live ready.

Go Live/Support
Transition to VelocityEHS Support
In the 2-3 weeks following Go Live, the VelocityEHS Implementation 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 Implementation Team, to the VelocityEHS Client Care team. An email communication will be sent by the Client Care Manager to introduce the team, and provide details of available services.

The Customer's dedicated System Administrator(s) will become the first point of contact for all end user inquiries and issue reports. System Administrator(s) will be charged with the responsibility of investigating and responding to such reports as best possible and will be the flow-through for any items which require further support from the VelocityEHS Client Care team to resolve.

Post Go-Live 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 users have the best experience possible with VelocityEHS.

Assumptions and Exclusions
Because this implementation approach does not analyze business objectives, needs, or design solutions configuration must be limited to changes that do not require in-depth consulting. Therefore this implementation option does not allow for configuration beyond what can be accomplished through administration interfaces in the application (e.g. e-mail notifications, user roles, etc…) and the technical configuration areas listed below:

- Import templates
- Add available output columns to views
- Add lists as filters to reports
- Add lists as secondary breakdowns to reports
- Add new fields for client-specific data that do not drive behavior of other fields or components
- Add/modify field level help text
- Edit the agency list
- Edit the root cause tree
- Enable activity or incident type qualifier for default responsible roles
- Hide component/fields
- Hide/show units in unit drop downs
- Modify the content of drop down lists
- Modify security assignments to existing roles
- Rename roles
- Move & remove components
- Re-label components/fields

- Remove categories
- Remove columns from views
- Remove incident types
- Remove workflow steps in any module except MOC
- Turn field validations on/off
- Add/Removing Meeting Types
- Hide/Show Meeting Job Titles