



IMPLEMENTATION GUIDE

Version 1.8

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Introduction

An ERP implementation is successful when your staff embrace the changes to their processes and tools by adapting to the new tools, controls, and ways of working. To ensure that everyone is on board and understands the change, we have designed this guide to help manage your implementation.

This guide comes with a list of best practices and checklists that will ensure that your transition to OnRamp Solutions ERP is as quick and successful as possible. To aid you in this, the guide includes:

- 🕒 Change management checklist and forms
- 🕒 User Engagement checklist and forms
- 🕒 Team member table
- 🕒 Implementation task checklist
- 🕒 Data migration best practices checklist
- 🕒 Testing best practices
- 🕒 Training overview
- 🕒 Weekly meeting forms

Glossary

- 🕒 **ERP** – Enterprise Resource Planning.
- 🕒 **SME** – Subject Matter Expert.
- 🕒 **KPI** – Key Performance Indicator.
- 🕒 **Change Request** – A change request is a form you fill out to request a change to the ERP. The department SME should approve the change request and forward it to the OnRamp Solutions development team to be considered for a future release.
- 🕒 **Test Environment** – A test environment is a system used to test your migrated data.
- 🕒 **Test Production Environment** – A test production environment is a system that resembles your production system and is used to test functionality or for training.
- 🕒 **Production Environment** – A production environment is the system you use daily.
- 🕒 **User Acceptance Testing (UAT)** – User acceptance testing is the process of users:
 1. Signing on to the test environment.
 2. Running the tests from the test plan.
 3. Documenting the results.
- 🕒 **User Volume Testing (UVT)** – User volume testing is a test with multiple users signed in to confirm that the system can handle the strain of your daily operations. This process is run with automated processes.
- 🕒 **Milestone** – A milestone is a group of tasks that mark a specific point in the project lifecycle.
- 🕒 **Task** – A line item of a milestone that needs to be complete for the project to move forward successfully.
- 🕒 **SOP** – Standard Operation Procedure

Preparing

A successful ERP implementation can be a challenge but, like everything, a good foundation can lead to great results. This chapter will help you start the implementation project right.

The typical duration of an implementation project will vary based on the firm size, the previous planning software used, and other items. However, the average implementation for OnRamp ERP is 6 months for a firm of 60 – 90 staff.

Implementation Team

The implementation team is responsible for signing off on functionality that will impact their respective departments and for training staff on updated processes.

Team members are SMES and have the following characteristics:

- 🕒 Key user group representation
- 🕒 Individuals that have a bright future at the company
- 🕒 Individuals that believe in the company
- 🕒 Deep understanding of processes in place
- 🕒 Rapid decision-making
- 🕒 Key knowledge transfer

In addition, weekly meetings are recommended. Management should fully endorse these meetings and help the team open their schedule for the desired time slot.

The ERP project should contain the following teams:

- 🕒 **Executive Committee** – with executive level responsibilities.
- 🕒 **Core Team** – with managerial and functional implementation responsibilities.
- 🕒 **End-Users** – those that will be using the new system.

Executive Committee

The executive committee is responsible for steering the implementation towards completion of the business case that lead to acquiring the OnRamp Solutions ERP. The committee:

- 🕒 Manages the impact to each department
- 🕒 Has final authority over the implementation

The committee should be comprised of key decision-makers from each department affected by the implementation, such as:

- 🕒 The CEO, or person with equivalent authority over project matters
- 🕒 The CIO
- 🕒 Department stakeholders at the VP level
- 🕒 The ERP project manager

ISO, regulated, or SOX compliant firms will require a more thorough preparation stage that accounts for added audits, updating SOP, etc.

Improve your implementation success by having your ERP vendor review the current state of your data early as you may need to begin cleaning it up earlier to ensure the you stay on schedule.

*A team member table can be found in **Appendix A** or refer to your online checklist hub.*

When building an internal team: If it hurts the daily business to add the person to the implementation team, having them there is the right decision.

Business decisions drive an ERP purchase, so business decisions must also drive the technical implementation. The executive committee is responsible for making those business decisions.

Core Team

The core team is responsible for doing all the leg work related to the implementation, such as describing the current processes and training staff in their department. The core team should be a small team, of up to 7 people, that is comprised of your most skilled, experienced, and qualified individuals. Team members should possess:

- ④ General business knowledge
- ④ Operational knowledge of their department
- ④ Good leadership and delegation skills
- ④ A willingness to get dirty
- ④ Excellent verbal and written skills

The core team should be comprised of:

- ④ The ERP project manager
- ④ Functional leads
- ④ Selected users that will become SMEs
- ④ OnRamp Solutions implementation specialist

ERP Project Manager

A project manager can be an unpopular position. Their job is to take ownership and ensure a useable delivery by pushing for more to get done while the rest of the implementation team members have other duties demanding their time. This can generate tension, but tension is often a sign that the project is progressing at a good pace. A good project manager will not be afraid to step on a few executive toes if it means the project is completed within schedule and budget.

Useable delivery success means the implementation is:

- ④ On time
- ④ Within budget
- ④ Accepted by the committee and the core team
- ④ Usable at volume with minimal speed issues

Sitting on the executive committee, the project manager can get a better understanding of the strategic objectives while ensuring that the executive team understand:

- ④ Project-level implications of the objectives
- ④ The feasibility of implementing the objectives
- ④ The risks of implementing, or not implementing, the objectives

By sitting on both the committee and the core team, the project manager can translate the committee business needs into core team project deliverables, thus improving communication.

Intense training of the core team may be required, specifically for the future SMEs, to ensure they are ready for the added duties after go-live.

*Considering the size of your project, you may want to split the project manager duties into **product and business**, where the product manager is in charge of implementing the ERP and the business manager handles the business process portions of the project.*

Time is of the essence. Generating some tension is a small price to pay to ensure success.

Get approval for the core team to work over time, with pay. Allowing the core team to work as much as required will ensure that the implementation is on schedule.

Adding Team Members

Most OnRamp processes are run automatically, but to ensure that the project hits the ground running, we recommend manually entering the executive committee and the core team in to the system. To do this:

1. Sign in to **OnRamp**.
2. On the **Main** tab, select **General > Implementation**.
3. Click on **Implementation SME**.
4. Click **Add**.
5. Enter all relevant information.
6. Repeat steps **4-5** until all team members have been entered.
7. Click **OK**.

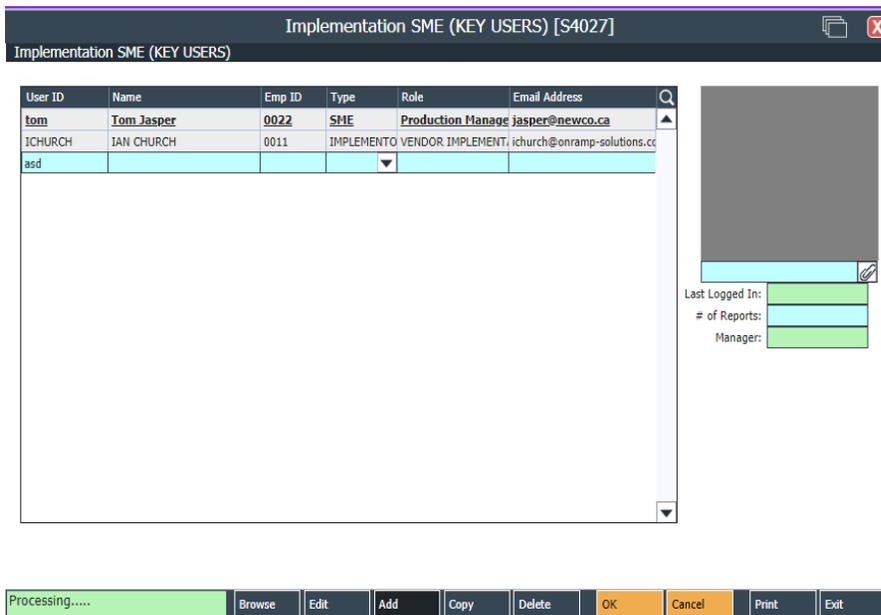


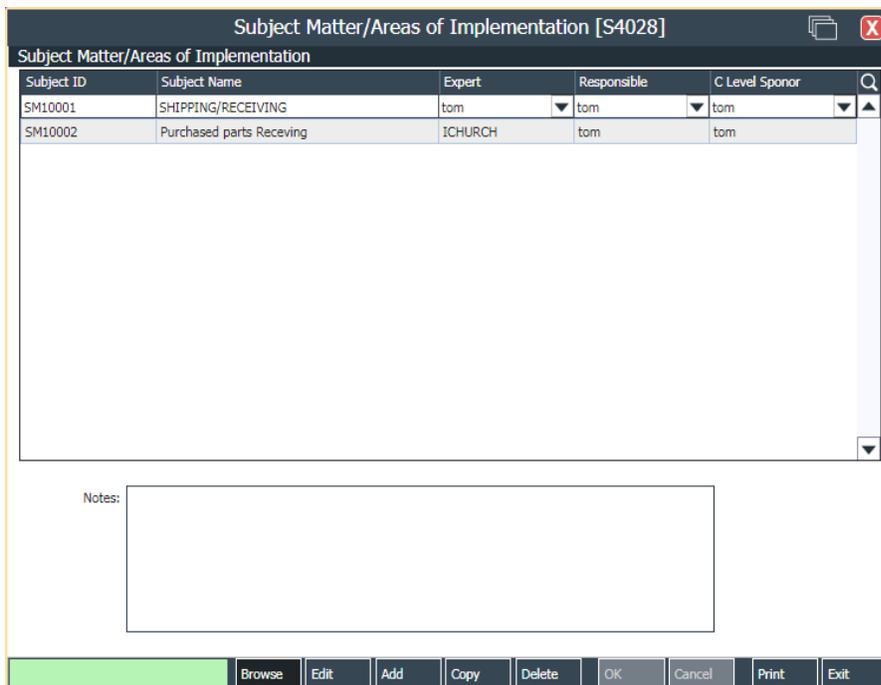
Figure 1.1: Implementation SME (Key Users) screen

Tip: Have each team member enter their own information so they can become familiar with OnRamp.

Setting Areas of Implementation

To help keep track of core team responsibilities, update the Subject Matter/ Areas of Implementation screen before proceeding with the implementation. To do this:

1. Sign in to **OnRamp**.
2. On the **Main** tab, select **General > Implementation**.
3. Click on **Subject Matter/ Areas of Implementation**.
4. Click **Add**.
5. Enter all relevant information.
6. Repeat steps **4-5** until all implementation areas have been entered.
7. Click **OK**.



Subject ID	Subject Name	Expert	Responsible	C Level Sponsor
SM10001	SHIPPING/RECEIVING	tom	tom	tom
SM10002	Purchased parts Receiving	ICHURCH	tom	tom

Notes:

Figure 1.2: Subject Matter/ Areas of Implementation screen

*Tip: Have each team member enter their own area so they can become familiar with **OnRamp**.*

Team Meetings

With a tight schedule and project phase dependencies, it is important to ensure any decisions are taken quickly. Keep your implementation on track with a formal meeting schedule:

- 🕒 In committee meetings, the executive team reviews progress and makes decisions
- 🕒 In core team meetings, the project team implements changes and resolves issues

Asides from your weekly meetings, have a gate meeting at the end of each milestone. Use the gate meeting to sign-off on the completed milestone and kick-off the next one.

Kickoff Meetings

Starting the ERP implementation project with a motivating team meeting can help focus members on their tasks.

It is recommended that you have two meetings when kicking off the project.

Core Team Meeting

The core team meeting is a tactical and organizational meeting held by the core team. Key achievements for the first core team meeting will be setting the:

- 🕒 Key Performance Indicators
- 🕒 Project budget
- 🕒 Project schedule
- 🕒 Team member responsibilities
- 🕒 Framework for issue resolution

The core team should receive early training on the new ERP and work to present the new system during the general meeting to introduce and excite the company.

General Meeting

The general meeting is an “all-hands” meeting, with the executive committee, core team, and the rest of the company in attendance. These meetings are to show the company’s commitment to the new implementation. Key features of a productive general meeting:

- 🕒 Set a formal agenda that includes:
 - Opening address
 - Overview of project roles and responsibilities
 - Presentation of key project elements
- 🕒 Have the CEO deliver the opening address to reinforce the commitment to the project

*A weekly meeting notes form can be found in **Appendix B** or refer to your online checklist hub.*

Meeting cadence can vary depending on project phase and situation.

Establish an ad-hoc, or emergency, process to address urgent issues that cannot wait until scheduled meeting dates.

You can divide core team meetings into general and functional area meetings where the general meetings get a overall review and functional area meetings address unique needs by area.

Resistance to Implementation

One of the issues with any major implementation are parties that are resistant to change. Examples of resistance can come from:

- **Workers Union** – objects to their workers receiving job duties that are outside the collective agreement.
- **Employees** – afraid of new processes and systems or are unwilling to learn.
- **Managers** – reticent to lend their top performers to the implementation team.
- **Executives** – would lose performance-based incentives because of short-term disruptions caused by the implementation project.

By identifying the sources of resistance, the change management plan can be updated to covert the naysayers into change leaders. A good communication strategy is often the key to overcoming this resistance.

Communication Strategy

The communications plan should codify the procedures and responsibilities of sharing information about the ERP implementation project. Starting with the “all-hands” kick-off meeting, discussed in chapter 1.2.1, key stakeholders should be kept in the loop.

Keep everyone informed with: email newsletters, press releases, meetings, town halls, and analyst interviews/earnings calls. Although regular one-way communication is important, occasionally engage stakeholders and staff with two-way communications, like town halls and departmental meetings. Their input may bring to light key project-based issues that the implementation teams may have overlooked.

Early and frequent communications help keep your staff engaged and aware of the new business processes, tools, and controls.

Building

Your OnRamp Solutions implementation specialist will work with your IT department or consultant to ensure a smooth transition to the OnRamp ERP hardware and software requirements.

Refer to the OnRamp Solutions ERP System Requirements guide for information.

Consider adding benchmark bonuses for when certain milestones are met or exceeded as an added incentive for your core team.

The nuclear option: If the CEO is on board with the ERP implementation and those resisting it are unwilling to compromise, the project manager should consider:

- *recommending employee dismissal*
- *recommending project termination*
- *resigning from the project*

Planning

“Those who fail to plan, plan to fail”. With that in mind, this chapter will help you plan and map out the ERP implementation. This is one of the longest and most difficult parts of the guide, but also the most important.

Project Plan

The project plan is an easily understood guide to a successful outcome with milestones to help track progress.

A milestone is composed of a series of tasks. With each completed milestone, your team should meet to determine if the project is on target with respect to budget, time, and performance. Immediate feedback and corrective action mitigate implementation risks like scope creep, cost overruns, or delays.

A good project plan should, at a minimum, include the following:

- ① Project charter
- ① Scope statement
- ① Milestones, deliverables, and tasks
- ① Schedule and budget
- ① Reporting structure
- ① Subsidiary plans dealing with scope management, risk management, resource management, communications, and public relations

Project Charter

The project charter describes the business case for the company’s decision to pursue this project and the project success at a high level.

Scope Statement

The scope statement describes the project boundaries as part of the charter. It contains the following:

- ① **Strategic Business Accomplishments (SBAs)**
- ① **Measurable Success Factors (MSFs)**

Schedule and Budget

The schedule and budget describe implementation task milestones along with their respective complete-by date and cost. This can help with monitoring, which in turn helps avoid delays or cost overruns.

Reporting Structure

The reporting structure describes key communication lines, reporting relationships, and responsibilities.

*An implementation tasks checklist can be found in **Appendix A** or refer to your online checklist hub.*

***SBAs** are intended goals of the project. Example: A supply chain SBA could be to reduce warehouse costs.*

***MSFs** are the measurable targets of the SBAs. Example: In the above SBA, the MSF could be to increase inventory turnover by 15%.*

*A schedule and budget table can be found in **Appendix A** or refer to your online checklist hub.*

Subsidiary Plans

The subsidiary plans describe any added project plans required for the sub-components. The subprojects are then broken down into specific tasks, schedules and budget, and MSFs. Common subsidiary plans include:

- ① **IT Infrastructure and Procurement Plan** – details the requirements for hardware, software, disaster recovery, staffing, etc.
- ① **Risk Management Plan** – details potential risks, damages, and mitigation strategies.
- ① **Budget and Schedule Plan** – details internal costs, external costs and project timelines at the task level.
- ① **Resource Management Plan** – details project roles, responsibilities, and reporting relationships.
- ① **Communications Plan** – details content subject-areas, delivery methods and intended audiences.
- ① **Scope Management Plan** – details how scope changes are identified, classified, and incorporated into the project plan.

Update OnRamp Milestones

Once you have solidified your project plan and requirements, review the existing OnRamp milestones to add, edit, or delete items to better suit your implementation project. To do this:

1. Sign in to **OnRamp**.
2. On the **Main** tab, select **General > Implementation**.
3. Click on **Implementation Milestones**.
4. Review the list of milestones.
5. Update the list as desired.
6. Click **OK**.

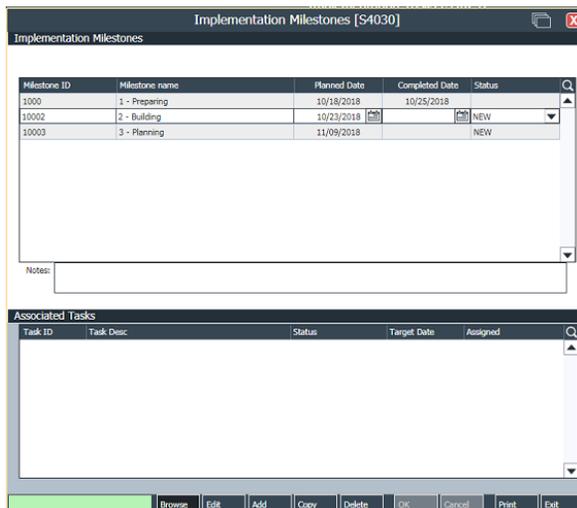


Figure 3.1: Implementation Milestones screen

The Risk Management Plan should be as specific as possible to ensure you are ready for any event.

A detailed Budget and Schedule Plan will help keep a realistic timeline and facilitates monitoring and correction.

Take reward systems, training, back-filling, and knowledge transfer into account on the Resource Management Plan.

On the Implementation Milestones window, click:

- **Edit** to change a milestone
- **Add** to insert a new milestone
- **Delete** to remove an existing milestone

The list of tasks assigned to the milestone is listed below, in the Associated Tasks applet.

As milestones are completed, navigate to the Implementation Milestones window and update accordingly.

Update OnRamp Tasks

Once you have solidified your project plan and requirements, review the existing OnRamp tasks to add, update, or remove items to better suit your implementation project. To do this:

1. On the **Main** tab, select **General > Implementation**.
2. Click on **Implementation Tasks**.
3. Review the list of tasks.
4. Update the list as desired.
5. Click **OK**.

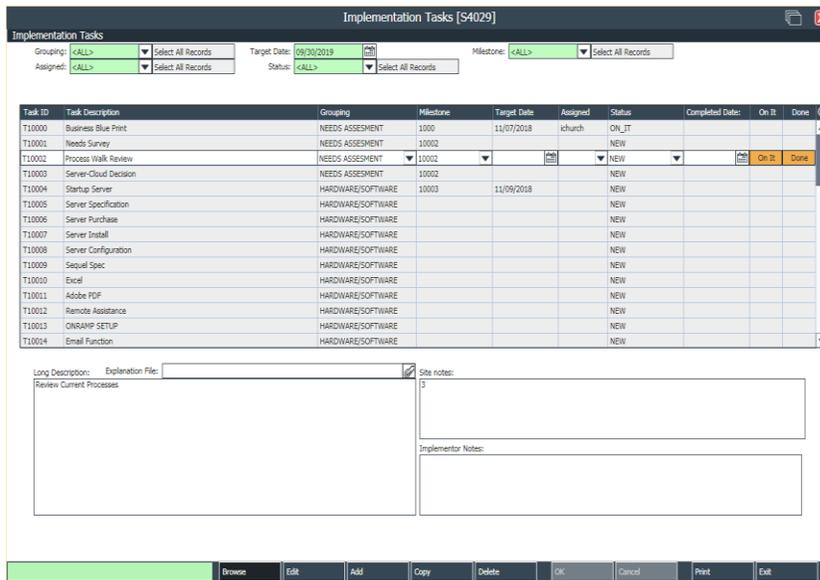


Figure 3.2: Implementation Tasks screen

As tasks are assigned and completed, navigate to the **Implementation Tasks** window and update accordingly:

- **Edit** to change a milestone
- **Add** to insert a new milestone
- **Delete** to remove an existing milestone

The following task fields can be updated without clicking **Edit**:

- Grouping
- Milestone
- Target Date
- Assigned
- Status
- Completed Date
- On It
- Done

Reports

To ensure you know what your targets review all your reports and save them as a PDF in a separate and secure location. These reports will set a good baseline for what to compare your KPI values to after the implementation. An example of reports to save:

- 🕒 Day-to-day business operation reports
- 🕒 Tactical business operation reports
- 🕒 Executive reports
- 🕒 Current metrics

With the reports saved and reviewed, get acceptance that each functional test will resolve to the desired results. In other words, the reports are used by your ERP vendor to show you how the new ERP system is used so you know what actions to take that will generate the desired results. This will be the basis for you're the user acceptance testing (UAT) plan. Because the UAT plan is vetted in this way, these reports are used to confirm that:

- 🕒 There are no gaps in the implementation, i.e., that the process has been implemented completely.
- 🕒 That the user test scripts are complete and cover the processes in a way that ensures similar or better results.

The UAT plan will then form the framework for your future SOPs. The new SOPs become the basis for user training, guides, and quick reference cards.

Project Plan Overview

- Complete the project plan
- Set the scope, budget, and schedule completion date for milestones
- Assign proposed deliverables for volume and velocity
- Completely map out affected business processes:
 - Identify current processes
 - Identify target processes and customizations
 - Identify risks that may arise
 - Identify issues that may arise
 - Identify gaps that will require filling
- Present business scenario to the core team to confirm their validity
- Present the scenario to the executive committee to sign-off

Once the plan is signed off by both the core team and the executive committee, the project is considered locked down, where any changes to the plan must be approved by the committee and all changes documented with a change request that is accepted or rejected.

Reports can be run:

- Daily
- Weekly
- Monthly
- Quarterly
- Annually
- Ad hoc

Interview keyholders of the areas you are adding to the ERP. Set aside enough time to interview everyone that affects operations.

Change requests (CR) should have supporting documentation attached to record the logic and criteria used to pass the accept/ reject decision.

Business Process Mapping

Mapping the [business processes](#) means documenting each incremental step that is required to perform a work-related task. In an ERP implementation project, all business processes must be mapped. This can be catalogued with the following:

- ① Business Scenario List
- ① Current Process Map
- ① Target Process Map
- ① ERP Customization
- ① Change Management Plan
- ① Risk, Issue, and Gap Analysis

Business Scenario List

The business scenario list helps you organize and track required process changes that will be implemented in your ERP. By defining the processes of the project effectively, you have a benchmark against which implementation tasks are compared. Business scenarios should include the following information:

- ① **Department** – each affected department should have a list of scenarios.
- ① **Scenario summary** – a summary of the scenario.
- ① **Scenario probability** – the probability that the scenario will occur. If the scenario occurs over 80% are frequent. Under 20% are rare.
- ① **Current class** – if the scenario is currently a manual or an automated process.
- ① **Target class** – if the scenario will become a manual or an automated process.
- ① **Scenario frequency** – how often the scenario occurs: daily, weekly, bi-weekly, monthly.
- ① **Blueprint link** – a link to the relevant ERP business blueprint.
- ① **Status** – a summary of the process status: open, written, reviewed, completed.

ERP Business Blueprint

This document provides a more detailed view of the business scenario. Each blueprint must contain a comprehensive target process map of the functional area and a description of how those processes and systems affect other functional area. The following is the OnRamp Solutions recommended structure for an ERP business blueprint:

1. **Introduction:** Describes the functional area and highlights any major deviations between the current and target process flows.
2. **General Overview:** Describes the IT system.
3. **Functional Overview:** Describes the relationship between the various modules.

*Mapping the processes requires a step-by-step, process level, understanding of how each affected work-related task is currently accomplished (**current**) and how those tasks will be accomplished in the future (**target**).*

*A business scenario table can be found in **Appendix A** or refer to your online checklist hub.*

Do not confuse frequency with probability.

***Frequency** is how often a scenario occurs: daily, weekly, etc. **Probability** is the odds of it occurring: frequent (80%) or rare (20%). For example, customer invoicing would be frequent. Product returns for warranty repair, would be rare.*

Apply the Pareto principle to ensure that frequent operations, or (80% of daily processes) in your current state are in the new ERP on launch. Rare or unique tasks can be actioned under continuous improvement.

4. **Functional Flow:** Describes the functional area's target process flows.
5. **Master Data, Screen Caps and Key Fields:** Describes the master data files, screen captures, key fields, and their contents.
6. **Reporting Requirements:** Defines the functional area's reporting needs.
7. **Batch Processes:** Defines the functional area's batch process schedules.
8. **Customization Requirements:** Defines any modifications the OnRamp system requires to satisfy functional needs.

As the implementation proceeds, the process flows may be updated. You should ensure that the business blueprints are also updated.

Current Process Map

Map the current processes by conducting department interviews and walking through the facilities. Ensure that the interviews generate a detailed and precise recording of current departmental processes.

Target Process Map

This is the desired business processes once the ERP is implemented.

ERP Customization

The ERP system should automate business processes according to the target process map. If there are processes that are not automated, but should be, discuss the issue with your implementation specialist.

Change Management Plan

This document describes how to implement the changes from the **current** state to the **target** state. A good change management plan includes:

- ① Reporting line changes
- ① Duty changes
- ① Training requirements
- ① Resource requirements
- ① Budget estimates

Risk, Issue, and Gap Analysis

This document lists and prioritizes all potential gaps, problems, issues, and risks. The resolution efforts are detailed, including resource, cost, and time requirements. Ownership is also listed.

ERP business blueprints serve as a great base for a future knowledge management database that can be used to train employees on the ERP system and processes.

ERP business blueprints can also be used on future projects since the target process flow becomes the current process. This will facilitate needs analyses in future IT and operations initiatives.

*A change management checklist can be found in **Appendix A** or refer to your online checklist hub.*

*A risk, issue, and gap analysis form can be found in **Appendix A** or refer to your online checklist hub.*

Business Process Presentation

With everything mapped out, core team members should create a presentation detailing their department target processes. The project manager will ensure that, based on the presentations, the department processes flow well from one department to the next with minimal negative impact.

Prepare the Presentation

The goal is to communicate the target process. The material should be based on the target process map. The core team member should focus on their departmental business process, not on training.

Present to the Core Team

In a core team meeting, the department SME presents their information in front of the core team.

Approve Process

Each core team member must approve the process for each department. By having a full team approval process, you reduce the number of potential inter-departmental conflicts and identify missing inter-departmental process tie-ins.

Update Business Blueprints

Based on the core team feedback, update the business blueprints.

Update Risk, Issue, and Gap Analysis

Based on the core team feedback, update the risk, issue, and gap analysis.

Review Customization Requests

Based on the core team feedback and in consultation with the implementation specialist, update or create OnRamp customization requests. Customization requests should be approved/rejected by the executive committee.

Your OnRamp implementation specialist will be on hand to assist your core team members with producing and delivering useful presentations.

Customization requests (CUR) should have supporting documentation attached to record the logic and criteria used to pass the accept/ reject decision.

Migrating

To ensure a minimal disruption to daily operations, best practice is to prepare the data for migration. This step is often overlooked and can give rise to many issues, including missing customer contact information, misplaced invoices, or incorrect part forms. It is also beneficial to train staff with usable data, even if this data is on a testing environment.

Data Migration Plan

A good data migration plan should include: the **location** of the data, the **timing** of the migration, and **testing** of the migrated data.

Data Location Plan

The data location plan is composed by the core team and documents the strategies used to **locate**, **clean**, **migrate**, and **maintain data integrity**. The documentation should include a list of migration information for each data category being migrated such as:

- 🕒 Relevant table
- 🕒 Original data source
- 🕒 Type of data (static or dynamic)
- 🕒 Cleaning method
- 🕒 Migration method
- 🕒 Integrity maintenance method

Timing Plan

Schedule your data migration in three phases, while considering the burden on the core team and the validity of the data. When the core team has the time in their schedule and the data is ready, schedule the data for migration based on priority. Use the following priority categories:

1. Static data
2. Long-term dynamic data
3. Short-term dynamic data

Testing Plan

Plan to test the data in the following six different stages:

- 🕒 **Legacy** – the current ERP system.
- 🕒 **Sandbox** – small test environment.
- 🕒 **Development** – environment used by developers.
- 🕒 **Quality assurance** – environment used for test by the core team.
- 🕒 **Training** – environment used for training.
- 🕒 **Production** – actual work environment.

As mentioned previously, starting the data migration earlier by handing your data to your ERP vendor at the start of the project can ensure your implementation project stays on schedule.

Master data files and key files are critical during the data migration and customization phases.

*A complete cleaning legacy data checklist can be found in **Appendix A** or refer to your online checklist hub.*

*Look for data that is not shared between departments and identify their location and reason for usage early. These **data silos** often cause the largest issues during data migrations.*

Data Cleaning and Converting

Data errors and redundancies add risks to an implementation. To avoid this, clean the data:

- ① in the legacy IT or ERP system
- ② in an intermediate format, like Excel

Once the data is clean, it should be converted in to the desired format, for example: dates as yyyy/mm/dd instead of dd/mm/yyyy. This can be done manually or with an automated system.

Cleaning and Converting Data Overview

- Ensure customer contact details are correct
- Delete redundant internal data
- Delete redundant external data
- Configure the fields

Data Migration

There are two types of data to migrate, static and dynamic:

- ① **Static data** – data that changes infrequently. Because of this, migrate early in the implementation process, freeing up time to focus on migrating the dynamic data later.
- ② **Dynamic data** – data that changes regularly. Because of this, migrate as late as possible in the implementation process, ensuring that the new ERP has the most up-to-date data. Migrating dynamic data with dates occurring during the cutover is difficult and risky.

Migrating Legacy Data Overview

- Complete the cleaning and conversion
- Map legacy fields to the new database fields
- Transfer data to the new system
- Test and verify legacy data
- Test and verify new data inputs

Static data examples include engineering master files and price books.

Dynamic data examples include shop work orders and accounts receivable open items.

Approving Documents

Once you have some data in OnRamp, update the look of the generated documents, such as your invoices, receipts, or work orders. To do this:

1. Sign in to **OnRamp**.
2. On the **Main** tab, select **General > Implementation**.
3. Click on **Implementation Document Approval**.
4. Click **Edit**.
5. Under **Example File**, click .
6. With **File Picker Mode** on **New File**, select the desired file.
7. Click **OK**.
8. From the dropdown menu, select the **Sign Off User**.
9. Repeat steps **5-8** until all documents have been updated.
10. Click **OK**.

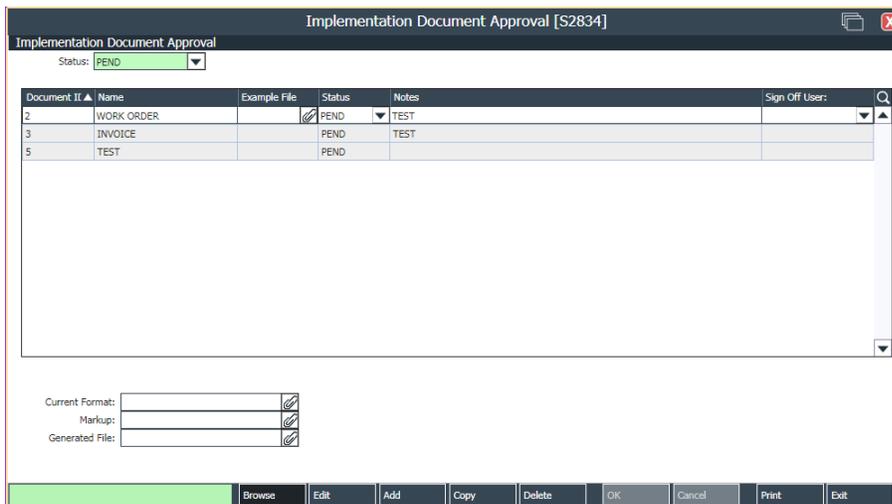


Figure 4.1: Implementation Document Approval screen

For a complete guide on editing the OnRamp supplied documents, refer to the OnRamp Documentation Guide.

Testing

Due to the complexity involved in an ERP system, any successful ERP implementation will require aggressive, and extensive, testing. A good test plan allows your team to test the system, evaluate potential issues, and fix those issues.

Have a test plan in place with multiple scenarios specific to each affected department.

Record and discuss the test results. Change requests that come up from this discussion should be brought up with your implementation specialist.

If possible, implement different testing environments that are an exact replica of your production environment.

Once the system is set up, migrate the clean data to the test environment.

Testing Overview

Use the following checklist to confirm that you are ready to begin testing:

- Migrate the clean data to your test server
- Provide each department with a relevant test plan
- Confirm that the results from the test match the desired outcome on the test plan

Core System Tests

To ensure adequate testing is performed on the new ERP system, three pilot tests are required:

- ① **Frequent Business Process pilot** – used to test the frequent probability business scenarios.
- ② **Stress Test pilot** – used to test all business scenarios.
- ③ **Process Interaction pilot** – used to test that functional areas can successfully handle transactions between them.

Frequent Business Process Pilot

The frequent business process pilot can take up to three weeks to complete and requires that your core team members participate directly in the testing. The goal of the frequent business process pilot is to ensure that the new business processes are synched with the system configuration and to modify both, as required.

These processes are a “day-in-the-life” type tests, where a user runs through their daily tasks. These tests will often be run during off hours, or on the weekend, to see if the new solution is working according to desired speed and volume rates.

*A complete testing checklist can be found in **Appendix A** or refer to your online checklist hub.*

The team should complete the following:

1. Adjust the system parameter settings.
2. Update the business scenarios.
3. Write procedures for the frequent probability business scenarios.
4. Test the business scenarios and procedures with test data.
5. Update the business model and business blueprints.
6. Run a single transaction through all departments to test the functional area transaction handling.

Stress Test Pilot

The stress test pilot can take up to eight weeks to complete and is used to train your end-users.

The goal of the departmental stress pilot is to:

- ① Validate updated and untested target business process scenarios and procedures
- ② Resolve all remaining high priority issues
- ③ See how well the system can handle the daily workload

The end-users should be trained by the core team as they run through their daily tasks to complete the following:

1. Train end-users on the new ERP system and business model.
2. Train end-users on the frequent probability business scenarios and procedures.
3. Validate the frequent and rare business scenarios and procedures using static migrated data.
4. Update the business model and business blueprints.
5. Resolve all remaining high priority issues.
6. Checkpoint ERP tables and parameters.

Process Interaction Pilot

The process interaction pilot can take up to three weeks to complete and is run with as many users as possible.

The goal of the process interaction pilot is to test the inter-department transaction handling.

The end-users should test the system with a wide set of actual legacy data and run through their daily operations.

*A complete testing checklist can be found in **Appendix A** or refer to your online checklist hub.*

Testing Change Request

If testing results in a change request that is discussed with your implementation specialist, refer to the change management plan. Once the test environment is updated with the desired changes, test the affected areas again to ensure they are working correctly.

Change requests fall in to three core categories:

- ① **Modifications** – require changes to the OnRamp Solutions ERP code. These tend to be costly upgrades that can be difficult to support and maintain.
- ② **Personalizations** – are enhancements that do not impact the ERP code.
- ③ **Interface projects** – are application tie-ins that allow OnRamp Solutions ERP to communicate with third-party applications via plug-ins, or other software.

Performance Monitoring

Systems will run to monitor the performance in the test environment with a live view of the test load and daily reports detailing the task.

Keep it simple – plan to keep the implementation testing to the most regularly used processes to start and then branch out from there

Training

Ensure that your ERP implementation is successful with better training, tailored for each department with e-learning modules for most office-based departments and in-class learning for those that are more hands-on.

Training should be run shortly before implementation to ensure users retain their working knowledge of the ERP.

Using the core team to train your staff will ensure that your organization will be more self-sufficient with the ERP moving forward.

User Training Guide

The base of your user training guide is your UAT plan, business blueprints, your business scenarios, and your procedures. This guide can then be used to train new or inexperienced staff. OnRamp Solutions can help in molding these separate documents in to one easy to understand guide.

SME Training

An SME is an expert in their subject. Individuals that are part of the core team will often start off being the SME for their respective departments. If more are needed, or the duties as SME of a core team member cannot be fulfilled, an SME can be trained. Other users should be encouraged to funnel their inquiries through their department SME.

Individuals that show quick comprehension or extra curiosity in training sessions are excellent candidates for this position and they should be provided additional training and mentoring.

User Training

User training can be provided in class, or through e-learning modules. The hands-on part of training should be implemented as part of the departmental stress pilot and/or the integrated simulation pilot. We recommend reviewing the user-base with your implementation specialist and your SMEs to set up a proper training plan that ensures that all your users get the best training for their position.

Training Plan Overview

- Type of training (e-learning, workshops, seminars)
- Identify department specific training
- Decide on a date for e-learning module distribution
- Decide on a date for workshops

Your OnRamp implementation specialist will be on hand to assist your core team members with producing and delivering useful training.

*A complete training plan checklist and training table can be found in **Appendix A** or refer to your online checklist hub.*

*For help on creating and delivering training content, refer to the **Training Guidelines** document.*

Deploying

During go-live, everything that can go wrong will go wrong. But with good planning, better testing, and the best training you have reached the go-live date for your OnRamp Solutions ERP implementation and you and your team are ready for anything.

Communication is crucial during go-live, as it is important to know where the moving, and not moving, parts are and who's going to action them if they fail.

Go-Live Overview

- Pre go-live tests
- Go-live day communication plan
- Data backup scheduled and run
- Staff hours
- Department acceptance and success
- Post go-live tests

Success Metrics

Implementing any new process requires a learning curve. To ensure that your new ERP has been implemented successfully, it is good to set expectations. In the case of software that touches so many of your organization's moving parts, expect your KPI to improve slowly over time. For example:

	Late orders (% of total weekly deliveries)	Customer complains (p/week)	Time lost to Material Shortage (hrs/p/week)	Business Activity Reports
Pre-ERP	16%	31	4	Monthly
Week 1	18%	33	3.75	--
Week 2	17%	27	3.25	Bi-weekly
Week 3	12%	22	2.75	--
Week 4	7.25%	18	1.5	Weekly

Table 7.1: Example of improving metrics

Follow-up Meetings Overview

- Was the implementation within the original budget?
- Did you have the resources required to complete the project?
- Are your original change requests being actioned promptly?
- Are human errors decreasing?
- Is the ERP producing a positive ROI?
- Are staff using the ERP as designed or are they finding workarounds?
 - Why not?
 - How can you improve the situation?
- What actions must be taken in the upcoming weeks/ months?

Add department heads or team leads to the go-live team to help ensure a smooth transition. These leaders can also help review and add procedures as needed.

*A complete go-live checklist can be found in **Appendix A** or refer to your online checklist hub. Your go-live checklist will require changes based on your business and must include an exhaustive list of all tasks that must be done on go-live day/ weekend.*

You can use these values as benchmarks and tie project bonuses against their improvement.

*A blank success metric table can be found in **Appendix A** or refer to your online checklist hub.*

Appendix A: Checklists and Tables

Implementation Tasks

- Change Management Plan
 - Create a change management plan
 - Share the change management plan with relevant departments
- Budget
 - Create budget
- User Engagement
 - Department communication
 - Employee training
 - Employee feedback
- Implementation Team
 - Department representative
- Hardware installation complete
- Software installation complete
- Clean up legacy data
- Migrate data
- Create and distribute test plans
- Sign off on test results
- Create and distribute training packages
- Prepare for go-live
- Follow-up meetings

Change Management Checklist

- Forecast implementation budget and go-live date
- Assign KPI
- Risk, issue, and gap analysis
- Get approval for staff overtime during implementation
- HR alignment
 - Create new job descriptions
 - Plan employee transitions
 - Begin recruitment
- Communication strategy implementation
- Develop training guides
- Complete the data backup and storage
- Complete data migration
- Complete system testing
- Create change requests with Implementation Specialist
- Complete user training
- Set up temporary staff during roll-out
 - Operations
 - Shop floor
 - Administrative
- Go-live day activities
- Set legacy system to read-only
- Follow-up meetings
- Schedule legacy system sunset

Change Management Timeline and Budget Table

Task	Budget	Due Date and Time	Expected Hours	Completed Date and Time	Actual Hours
ERP Vendor					
Change management					
Team assembled					
Hardware installed					
Software installed					
Data cleaned					
Data migration					
Testing					
User Acceptance					
Training					
Go-live					
First post go-live meeting					
Final sign-off					

Budget

- Implementation fee: \$ _____
- Consultancy fees: \$ _____
- Customization fees: \$ _____
- Staff overage fees: \$ _____
- Total: \$ _____

Key Performance Indicator Table

Goal	Current Metric Score	Target Metric Score	Target date	Complete?

Team Member Table

Position	Title	Name	Contact email
Implementation Specialist			
Project Manager			
Executive Sponsor			
Shop Floor			
Shipping/ Receiving			
Purchasing			
Master Scheduling			
Engineering			
Sales/ Order Entry			
Production Manager			
Accounting			
Quality Control			
Human Resources			

Gap, Issue, and Risk Analysis Form

Reported Date: _____ Estimated Close Date: _____

 Issue Prioritization:

- High
- Medium
- Low

 IT Involvement: _____
 (1 low – 10 high)

Impacted Area	
Issue Description	
Department	
Owner	
Close Plan	
Close Resources	
Actual Close Date	

Approvers

Date

Cleaning Legacy Data checklist

- Notify order entry that they may have to make back-up notes on paper
- Cleaning your contact data. For example, misspelled names:
 - Ensure contact data is correct
 - Ensure contact data is in the correct fields
 - Delete redundant contact data
- Cleaning your internal data. For example, out-of-date product designs:
 - Ensure internal data is correct
 - Ensure internal data is in the correct fields
 - Delete redundant internal data.
- Cleaning your external data. For example, old supplier addresses:
 - Ensure external data is correct
 - Ensure external data is in the correct fields
 - Delete redundant external data
- Configure your database
- Map legacy fields to the new database fields
- Migrate data to the test environment or test production environment
- Test data
- Test new data inputs
- Migrate data to the production environment
- Test data
- Test new data inputs

Testing Checklist

- Migrate the clean data to your test server
- Provide each department with a relevant test plan
- Confirm that the results from the test match the desired outcome on the test plan
- Discuss the test results and record if a change request is required
- Discuss change requests with the implementation specialist
- Implement change requests and begin testing again.

If no new change requests are required and all updates have been applied, you are ready to go live.

Department testing checklist

- Senior management
- Accounting and finance
- Engineers
- CAD designers
- Shop floor workers
- Warehouse staff
- Supply chain workers
- Sales team
- Human resources staff

User Engagement Plan Checklist

- Communication methods:
 - Office staff: _____
 - Shop floor staff: _____
 - Other: _____
- Warnings of anticipated disruptions:
 - Data migration date _____ time _____
 - Training date _____ time _____
 - Server migration date _____ time _____
 - Scheduled updates date _____ time _____

Training Plan Checklist

- Set the type of training (e-learning, workshops, seminars)
- Identify potential SMEs
- Identify department specific training
- Decide on a date for e-learning module distribution
 - Create the e-learning modules
- Decide on a date for workshops
 - Create the workshop training package

Training Table

Department	SME	Method	Start Date	Hours required
Senior management				
Shop Floor				
Shipping/ Receiving				
Purchasing				
Master Scheduling				
Engineering				
Sales/ Order Entry				
Production Manager				
Accounting				
Quality Control				
Human Resources				

Go-Live Checklist

- Schedule the data backup
- Network speed and reliability testing
- Get approval for staff overtime and temporary hours
- Pre go-live Software Tests:
 - Integration testing
 - Functional testing
 - System testing
 - Stress testing
 - Performance testing
 - Usability testing with key departments
- Go-live day communication plan
- Run the data backup
- Department acceptance and success:
 - What went well?
 - What went wrong?
 - Are key departments embracing the new ERP? If not:
 - Why not?
 - How can you deliver refresher training?
- Post go-live Software Tests:
 - Integration testing
 - Functional testing
 - System testing
 - Stress testing
 - Performance testing
 - Usability testing with key departments

Success Metrics Table

Success Metrics Table						
Pre-ERP						
Week 1						
Week 2						
Week 3						
Week 4						
Week 5						
Week 6						
Week 7						
Week 8						
Week 9						

Follow-up Meetings

- Was the implementation within the original budget?
- Was the implementation within schedule?
- Did you have the resources required to complete the project?
- Are your original change requests being actioned promptly?
- Have productivity levels increased?
- Has customer satisfaction increased?
- Are human errors decreasing?
- Is the ERP producing a positive ROI?
- Are staff using the ERP as designed or are they finding workarounds?
 - Why not?
 - How can you improve the situation?

Appendix B: Weekly Meeting Note Template

Position: _____ **Meeting Number:** _____

Name: _____ **Date:** _____

Department: _____

Summary

Upcoming Tasks

	Due Date	Team Lead
<input type="checkbox"/> Task 1	1900/09/09	

Tasks Completed

	Date	Team Lead	Sign Off
<input type="checkbox"/> Task 1	1900/09/09		

Appendix C: Hardware and Software Inventory

Name/ID	Type	Model/ Version	Physical Location	Owner	Maintenance Contract?(Y/N)	Maintenance Contact	Maintenance Type/ Level of Coverage	Maintenance Expiration	Licenses Required

