Enterprise Content Services Go-Live Packet for New Customers

University of Colorado

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OnBase
by Hyland

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Scope of expectations for communication, training, organizational readiness and support assistance for going live with Content Services

This document includes the scope of expectations for communication, training, organizational readiness and support activities in coordination between UIS and campus partners to successfully go live with Content Services.

Communication

UIS	Campus
Universitywide campaigns	Department-level campaigns
Standardized communication templates	Communication templates targeted to department-level needs
Documentation about what to consider when developing individual communication plans	Developing department-level communication plans
Communicating with the Department Implementation Lead and Sponsor	Identifying and communicating with department/function-level key stakeholders (all users who interact with their document management instance and will need communication) and developing department-level stakeholder register
Developing overall document management policy/ procedure documentation	Developing policy/procedure documentation for the department level

Training

UIS	Campus
Training materials for basic system functions – quick reference guides and training website	Training materials specific to the operations of the department
Delivering instructor-led training on basic system functionality to key users, determined with each Department Implementation Lead at go-live (understanding the system, installing the client, logging in, performing basic functions, scanning and indexing)	Delivering training on business processes and department-specific tasks and expectations and delivering all training to users and departments not identified as part of the implementation

Organizational Change Management

UIS	Campus
Develop organizational readiness packet to assist departments with developing an effective change plan	Department Implementation Lead and Sponsor execute on organizational readiness packet as appropriate to the needs of their department and customers
Makes themselves available to answer questions and provide insight for implementing steps in the go-live packet	Makes themselves available to meet and complete steps in the go-live packet appropriate to the needs of their department
Provide consultation to each individual campus department to aid with organizational change questions	Reaches out for assistance when roadblocks to change are encountered that may need partnership

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Content Services Roles and Responsibilities

Participants in CU Content Services have specific responsibilities to perform in support of the application. This document outlines these roles and responsibilities.

Role	Responsibility	Person
Enterprise Content Services UIS Support Team	- Provides project implementation support to Department Implementation Lead and Sponsor. - Provides training for OnBase administrators. - Provides instructor-led OnBase basic training as part of go-live. - Provides post-go-live support for OnBase administrators. - Maintains and manages the OnBase environments (DEV, TST, STG, PRD). - Acts as UIS liaison with the Enterprise Content Services Advisory Committee - Supports Document Management Project Team (DMPT) members, as needed. - Partners with vendor to ensure CU's needs are heard and advanced.	UIS Content Services Team uis_dm_support@cu.edu
Enterprise Content Services Advisory Committee	- Makes high-level decisions that affect the scope, timeline, budget or quality of enhancements or other updates to the application. - Reviews institutional policy issues that occur in relation to OnBase and determines the best way to handle them.	https://www.cu.edu/uis/enterprise-content-services-advisory-committee
Enterprise Content Services Project Team	- Peer support contacts for each campus department using Document Management. - Partners with the UIS Project Team to perform testing to ensure accuracy of integrations between OnBase and other systems (e.g., Campus Solutions (CS), Master Data Management	

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	(MDM), Online Admissions Offering (OAO), etc.).	
Department Implementation Lead	• Partners with UIS Project Team on preparing for OnBase implementation. • Completes all assigned implementation tasks on time. • Identifies all affected stakeholders and prepares change management and communication plans, as appropriate. • Builds awareness and prepares stakeholders for go-live, including coordinating training with stakeholders and UIS Project Team. • Develops custom training materials based on business process and procedures specific to the business. • Ensures readiness for go-live per the go-live readiness packet. • Provides training and support to new and downstream users post-go-live. • Becomes a participating member of the DMPT following go-live.	Campus department OnBase technical lead
Department Implementation Sponsor	• Supports Department Implementation Lead by ensuring they have dedicated time for the implementation tasks. • Supports Department Implementation Lead with spreading awareness and gaining buy-in for the implementation. • Acts as escalation point for campus-level issues that cannot be resolved by the Department Implementation Lead.	Campus department leadership key contact
OnBase Vendor	• Provides timely response to support issues. • Provides standardized training materials and OnBase.	Hyland, Inc.

Content Services Roles and Responsibilities

	Community access for all CU registered OnBase users	
Content Services Users	• Attends training as determined by Department Implementation Lead. • Reviews training materials appropriate to their role. • Seeks support for issues that arise post-go-live.	End users and downstream users
UIS Technical Team	• Performs analysis and technical tasks related to database, infrastructure, integrations and application-specific work (OAO, MDM, CS, etc.). • Supports components of the OnBase environments or integrated systems. Monitors performance and performs troubleshooting, as needed.	Database Administrators, Infrastructure team, Integrations team, Application Managers, Developers
Campus Service Desks	• Attends training as provided by UISDM project team. • Supports campus questions and issues.	CU Boulder help@colorado.edu CU Colorado Springs helpdesk@uccs.edu CU Denver UCD-OIT-HELPDESK@ucdenver.edu UIS help@cu.edu

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Things to consider to smoothly transition your people to Content Services

You're getting ready to implement a change that affects not only your team and student employees, but potentially other departments and even students and staff. Your staff and partners may have to change their routines and learn new processes and procedures to replace comfortable application and business processes that have served them for years!

Why would you do this to them! What's in it for them?!

Take heart! Here are some things to consider to help you ease your staff and partners into the transition from your current content Services processes and related business practices smoothly into using the new application.

1. Ensure that your executive sponsor and all affected leadership understands the reason for the change and are onboard to champion the change during every step! If leadership does not back the change, staff will not follow.

2. You never want to hear the words "I didn't know this was coming!" Surprised users are unprepared users and may not adapt quickly.

   Identify all of your stakeholders up front and not just the members of your team.

3. Do you know who is concerned or downright against the new app? People resist changes for a number of reasons, from fear of new things to not wanting to give up being the expert in an application or process. Be ready to address resistance both large and small.

4. Identify everyone who needs to be trained and how they will best learn the new application and processes. Making sure everyone knows how to use the tool at go-live is key.

5. Have everything in place so that everyone is ready to do their job on your go-live date. From providing the right training to ensuring people know their logins, support your good work getting staff ready to go by ensuring they can start on Day 1.

6. Check up on your staff and partners after go-live. Keep the momentum going by getting ahead of issues before they can take hold!

7. Reach out for assistance if you need help!

Most importantly throughout the rollout! Communicate to your leadership and communicate to your staff!

Ensure that the right people know what's going on before it affects them, their teams and their users.

If they will care, make sure they're aware.

Content Services Go-live Checklist

Department: **Target Go-live date:**

Campus lead: **Campus sponsor:**

UIS partners: UIS Content Services Support Team (UIS)   uis_dm_support@cu.edu

Done?	Task	Responsible Group	Responsible	Date	Notes
Discovery Tasks					
	New Customer Survey: Document Goals and Objectives	Customer	Campus lead		
	Demo application and discuss best practice and theory	UIS/Customer	UIS, Campus lead		
	Consult and document configurations: Document types, Document Type Groups, Keywords, User Groups (may take 3-4 weeks to complete)	UIS/Customer	Campus lead, UIS		
Execution Tasks					
	Creation of configurations in Test: (1-2 weeks)	UIS	UIS		
	• Doc Types, Doc Type Groups	UIS	UIS		
	• Keywords, Keyword Groups	UIS	UIS		
	• Provision Users, UserGroups	UIS	UIS		
	Validation and Testing (2 weeks)	UIS/Customer	Campus lead, UIS		
	• Signoff	Customer	Campus lead		
	Migration of configurations to Production (2 days)	UIS	UIS		

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Content Services Go-live Checklist

Done?	Task	Responsible Group	Responsible	Date	Notes
	• Signoff	Customer	Campus lead		
Preparation for Go live Tasks					
	Schedule go-live date	UIS/Customer	Campus lead, UIS		
	Attend weekly project meetings	UIS/Customer	Campus lead, UIS, other project staff, as needed		
	Identify all stakeholders	Customer	Campus lead		
	Training:				
	• Review and communicate training quick reference guides, as appropriate	Customer	Campus lead		
	• Determine preferred training dates and trainees	Customer	Campus lead		
	• Book training room with PCs and projector	Customer	Campus lead		
	• Send training invitations	Customer	Campus lead		
	• Ensure appropriate trainees attend	Customer	Campus lead		
	• Training room setup, including projector and PC computers	Customer	Campus lead		
	• In class training materials, including customized materials, printed handouts and rosters	Customer	Campus lead		

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Content Services Go-live Checklist

Done?	Task	Responsible Group	Responsible	Due Date	Notes
	• Deliver Instructor-led training (4-hours minimum):	UIS/Customer	UIS: Basic Training Customer: Business process training		
	o Overview (2 hours)	UIS	UIS		
	o Scanning and Indexing (2 hours)	UIS	UIS		
	• Provide training to all users who were not included in classroom training as part of the project, including downstream users	Customer	Campus lead		
	Communicate to department and downstream customers that you are live and to begin using the service.	Customer	Campus lead		
	Go Live!				
	Support: • Pre-go-live	UIS	UIS		

	• Post-go-live
	     o Administrators
	     o Users
		UIS
		 Customer
			UIS, Campus lead		

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