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Out of the Box Implementation Overview

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Document Owner	Hatinger, Melissa	Document Author	Hatinger, Melissa

Refer Document Revision History on the next page.

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Document Revision History

#	Document ID	Reason of the change request	New version #	Effective date	Magnitude	Summary of changes
1	**CS-BR-0104**	Revision of Document	D	4/17/2023	Minor	Corrected template corrected font changed Future tense verbs to present tense verbs
2	**CS-BR-0104**	Revision of Document	C	4/17/2023	Major	Update from 4 apps to refer to contract. Added note below timeline table and updated verbiage and format throughout the document.
3	**IMP-104**	Revision of Document		8/9/2022	Major	Removing any tie to legacy data migration, redid the table to the latest table. updated revision number and date.
4	**IMP-104**	Initial Release		6/20/2022		

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Intellect's Implementation

This document provides an overview of the most critical tasks required for a successful Intellect implementation. Our Implementation service is a great fit for teams who want to implement quickly and who may be working with internal resource restraints. Intellect sets up the Intellect EHSQ environment and help with the launch of the application(s). The details are outlined below.

Out Of The Box Setup of Application(s)

Refer to the executed agreement for what is included in the implementation. Intellect's out of the box setup implementation method is the fastest method of implementation with the lowest customer effort. The result is immediate use of the system and adoption of a strong foundation with the out of the box workflows and processes. The assigned Implementation Analyst facilitates the setup per the agreement and provides a detailed project plan and timeline on the platform introduction call. After the out of the box application is set up, there is still the opportunity to make configuration changes post implementation conclusion call.

Example of an Implementation Schedule

No.	Milestone	Task Description	Responsibility	Week
1	Implementation Kick-Off	Implementation Kick-Off call with customer stakeholders & project team.	Intellect & Customer	0
2	Application and Design Training	Customer attends training. The implementation team assists with training registration.	Customer	TBD
3	Platform Introduction & System Table Introduction	Walkthrough meeting that covers the following topics: navigation, setup app, system tables, setup spreadsheets. Also covered is the detailed project plan and timeline. ***Timeline begins here on the first call with the assigned implementation analyst.**	Intellect & Customer	1
4	Finalize Data Spreadsheets	Review and finalize the system tables spreadsheets (Excel spreadsheet data). This data is staged for import into the testing site to complete the setup of the application.	Intellect & Customer	2,3
5	Setup of application	The implementation analyst completes the setup of the testing site. System table data that is required for application(s) use is imported.	Intellect	4

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No.	Milestone	Task Description	Responsibility	Week
6	Functional Testing	Customer reviews the data setup in the system and verifies functionality of data in system application(s). Feedback of setup values is provided by the customer to the Intellect Implementation team. *Customers plan for their internal training for the system, writing their work instructions for the system, etc.	Customer	5
7	Live Site Setup	The implementation analyst completes the setup of the live site. System table data that is required for application(s) use is imported. User setup is completed.	Intellect	6
8	Live Site Setup Verification	Application and User setup is verified.	Customer	7
9	Live Site Launch & Conclusion Meeting	Official Live site launch & Implementation conclusion meeting between Intellect and customer.	Intellect & Customer	8

Note: The timeline example displays the ***average*** timeline experienced with most implementations. The implementation timeline is established with the assigned implementation analyst and begins after task #3 is completed. The timeline may vary based on the contracted implementation inclusions and customer resources.

Services Not Included During Implementation

The table below provides an overview of common services **NOT included** in the Out of the Box Setup Implementation Process. If any of these items are needed, please contact the Sales Account Executive.

Service - Description
Configuration Changes (modifications or creation to fields, workflows, templates, etc.)
System Integration(s) (APIs, Webservices etc.)
Mobile Apps (creation, setup, or configuration)
Data Migration (mass uploads of data into the system)
Multilingual capabilities – Intellect does not provide translation services.

*Intellect offers Professional Services for these items at an additional cost.

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