

# EPAK Best Practices for Infor Application Implementations and Upgrades

*How to greatly increase the probability of success and realize the benefit of your investment.*

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## *Executive summary.*

Infor™ EPAK is widely recognized as an industry leading solution for on-demand training. Organizations that use EPAK, however, quickly realize the full potential of EPAK as a tool to support every phase of the software life cycle, including application implementation and/or upgrade projects. End-user training and application simulations are core components of EPAK—but the real value of the solution goes far beyond that.

## *Introduction.*

Enterprise applications have been implemented and subsequently upgraded by numerous organizations in the last twenty years. Organizations that invest properly in a solid implementation or upgrade approach are minimizing risk and are much more likely to experience long-term success with the applications. A tool such as EPAK increases the probability of success because it is easy to implement and use, time to return on investment is minimal and it is extremely flexible in the project activities it can support. This is important because organizations are constantly required to do more with less in terms of resources. EPAK can be used in all phases of an implementation or upgrade application life cycle including:

- Process review and design/blueprinting
- Applications setup and configuration
- Testing
- Training and change management
- Maintenance and support

This white paper will address how EPAK supports each of these project activities in more detail.

## *EPAK in the application life cycle.*

EPAK supports the application life cycle by allowing an organization to quickly create the critical documentation, training, and support materials required to drive project team and user productivity throughout the life cycle of the applications. The key to success with EPAK is to understand how its functionality enhances traditional project tasks to not only ensure higher quality task completion but reduced time to realize benefits. This allows an organization's resources to be efficient and spend more time running the business.

Implementation and upgrade projects vary in shape and size but several key tasks are common to all, and need to be completed to facilitate a successful project.

One of the important early activities in application life cycle is the review of existing business process information. This serves a twofold purpose. First, existing business process information is required to drive the setup and configuration of the upgraded or new applications. This information is discussed during requirements gathering sessions, process overview walkthroughs and fit-gap analysis activities. During an upgrade project, this includes the review of new application features and functionality. Second, this information is also important for project team education. The project team and related business process owners are the group that will really be responsible for ownership of the system long-term. Having this information in an easy-to-use and clear format will greatly enhance the application ownership experience.

EPAK supports this activity through the Business Process Documents and “See It” and “Try It” modes of eLearning. In an implementation, Business Process Documents support the review of key process information during the fitgap analysis activity; that is, comparing leading business practice with current practice to identify gaps. In an upgrade, these same documents can be used to identify the differences in system functionality between application versions. The “See It” and “Try It” modes of eLearning within EPAK give the project team an opportunity for hands-on experience with the applications very early in the project, even before an internal application instance is set up. Getting team members on the system early promotes learning from the project’s inception.

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## *Applications setup and configuration.*

A key activity in any project is the setup and configuration of the applications to facilitate system development, testing and deployment. Documentation of the setup and configuration is also critical as it acts as the record of key business decisions and how those decisions manifest in the system—something very important in the era of Sarbanes-Oxley.

EPAK can be used to record content specifically related to the setup of the system. Since setup information may change as the project progresses, it is important to have a mechanism to quickly update these changes as they occur. Individual setup steps or a multiple of setup steps can be recorded and then published in the appropriate documentation format, either individual business process documents or full training manuals or instructor guides depending on how setup and configuration documentation is stored. For upgrades, ongoing maintenance of these documents for future projects becomes much easier with EPAK.

EPAK also enables project team members to easily collaborate with other project team or subject matter experts in the development of key process flows or system changes. They can facilitate collaboration by sharing the “See It” or “Try It” modes in the EPAK Player. Additional information about the process or potential process can be provided through the use of Text Bubbles generated for each of the screen captures in the EPAK Player.

## *Testing.*

Testing is one of the most important activities on both implementation and upgrade projects. All EPAK topics can be modified quickly to allow for different testing scenarios. EPAK can support all types of testing on a project including the following:

- Integration testing—Individual EPAK topics can be recorded and sequenced to create end-to-end integration test scripts. These scripts can be published individually, printed and assembled for testing purposes or entire sets of topics can be published in a training manual format to create an end-to-end integration script. To facilitate this kind of content assembly, it is recommended to organize content along a process flow since end user training classes also benefit from this type of organization.
- User acceptance testing—Similar to integration testing, EPAK topics can be organized by process flow or job role to simulate real transaction processing by end users. Content should be published and assembled for user acceptance testing as it is for integration testing.
- Upgrade and system patch testing—When working in an upgrade project or applying system patches, it is important to have standard regression test scripts to ensure consistency. For patch application, relevant scripts can be quickly modified to address the new functionality. For a full upgrade project, topic frames can be modified to address specific changes in the application versions without having to modify the entire content library.

## *Training and change management.*

Supporting the human performance side of any implementation is arguably the most critical task to facilitate success. EPAK plays a large role in the support of organizational change management activities as well as training development, delivery and deployment.

### **Change management.**

With any Infor Applications implementation or upgrade, users will interact with the system differently. Whether it is changes to business process or the addition of new functionality, managing the change is a critical part of the process. Regardless if enterprise applications are being implemented for the first time or the end users are highly experienced, these changes need to be communicated clearly. The eLearning modes of EPAK can support this effort efficiently and effectively both when the initial change occurs and going forward.

Through the use of the “See It” and “Try It” self-paced eLearning modes within EPAK, eLearning can be used to effectively relate the key changes through the project’s communication plan that are occurring within an organization as a result of the implementation or upgrade project. This is particularly important for large enterprises with project teams and end-users globally distributed, making on-premise, classroom based training impractical. The use of eLearning also reinforces to end users that the organization is embracing technology to support business operations.

## **Training.**

The most obvious use of EPAK in the project life cycle is to support training development and delivery. Implementing EPAK as part of a blended training approach offers greater flexibility around the deployment of end-user training. In a traditional instructor-led training (ILT) class, users do not have the advantage of an introduction to the new software prior to entering the classroom, so much of the initial classroom time is devoted to user interface and navigation. While important, this is knowledge that can be brought to the classroom provided the right tools are available to end-users prior to attending the class. Using EPAK self-paced eLearning that simulates a user’s environment is very effective in teaching a user the fundamental navigation of the applications, leading to more manageable ILT delivery timelines, or the elimination of the need for ILT altogether, and increased retention of the content.

With or without ILT delivery, when learning conceptual and functional processes users can be directed to additional eLearning content that will reinforce these topics. Thus, users can gain knowledge by taking short, focused lessons from their own desktops as their schedule permits. This provides the interactive reference users need while actually performing the tasks for the first time, or can serve to keep the new functionality fresh in their mind between the training and go-live.

From a scheduling perspective, it is important to blend delivery methods to minimize the need for ILT delivery and shorten the overall training timeline. For example, an end user could first complete prerequisite eLearning before participating in an ILT or virtual classroom session. Completion of eLearning as a prerequisite supports two key implementation or upgrade goals – communication of business process and applications changes, and the process of end-user training and education.

Using EPAK before ILT delivery minimizes the number of questions users will have and limits the focus of ILT or virtual classroom sessions to more advanced topics. Since eLearning has been used as a prerequisite, the time required for the ILT or virtual classroom session is minimized or eliminated. If ILT is used as a delivery method, users can continue to utilize EPAK’s self-paced eLearning tutorials for ongoing support and refresher training. The percentage of time allocated to each of these activities will vary depending on the needs of the organization, but it is important to make every attempt to maximize effectiveness of the training delivery while minimizing the impact on users’ jobs. This is especially important as ILT delivery is not cost effective for a large or disbursed user population and it is difficult to repeat on a consistent basis.

## Using EPAK with a learning management system.

A learning management system (LMS) is a software application designed to help manage training within organizations, specifically around eLearning, although ILT programs can also be managed with most LMS solutions. Typically, the LMS will manage the training administration database and link to the organization's HR system. LMS solutions vary in functionality depending on the vendor, but should be capable of managing ILT and eLearning courses, as well as tracking user assessment test scores. Additionally, an LMS should be capable of directing and recommending training options based on a user's schedule requirements and job role. This functionality is very beneficial when blending ILT with eLearning as it allows for easier administration of training deployment while still providing the user with the training they require. The "See It", "Try It" and "Know It" modes within EPAK are most relevant to the use of an LMS solution. For those organizations not using an LMS solution, the Usage Tracking tool in EPAK is a more than adequate replacement to provide reporting on performance and learning retention.

One factor to be considered when using a blended training approach is to develop and deploy content that will be portable and delivered in different mediums—CD-ROM, corporate Intranet, or launched through an LMS. If the desired method of distribution is an LMS, it is important that the eLearning content complies with e-Learning industry standards, the most widely accepted of which is SCORM (Shareable Content Object Repository Model). All EPAK content is SCORM compliant by outputting to an LMS package during content publishing.

Because EPAK can produce standards-based content, it can be used in any enterprise LMS solution that supports SCORM.

## Supporting EPAK deliverables.

Related to the approach described above, there are several key deliverables in EPAK that support change management and training leading practices.

- Simulations/Practice—The "See It", "Try It" and "Know It" modes of EPAK can be used early and throughout the training process to provide constant reinforcement and refresher training. They can also be used during ILT classes as exercises. Another key to the use of practice simulations during a training program is that the need for a training instance is greatly reduced. It is recommended to have an instance available to enhance user acceptance during training to perform exercises but in those environments where hardware capacity is limited, EPAK simulations can be used in place of a live training system. This allows for greater flexibility around training delivery and a reduction in time around what would be used for training system setup.
- Assessment exercises—The "Know It" mode within EPAK can be used as an assessment exercise to gauge user retention during ILT classes and for learning topics solely delivered via self-paced eLearning. Competency can be tracked in EPAK Usage Tracking or via an LMS as previously described.
- Training manuals—Both student training manuals and instructor guides can be easily published out of EPAK to support ILT training delivery.

- Performance support—Traditionally, users have a “sandbox” instance where they can practice new application skills before performing work in the production system. The “Do It” mode of EPAK reduces the need for this practice instance since it is linked directly into the online help and guides the user through the transaction being performed one step at a time. Other modes of self-paced eLearning can also be used for ongoing performance support.
- Job aids—Like all content in EPAK, job aids can be easily published out of EPAK to provide quick desktop reference for users after training is completed and real work is being performed in the production system.

A key consideration some organizations overlook is the amount of time and effort it takes to keep various forms of content—such as training manuals, instructor-led training guides, and job aids—current and synchronized. Over time, many organizations find it onerous to keep these forms for content current, let alone in sync. EPAK, as a single synchronized content development platform allows enterprises to make updates in one place, via the EPAK Developer, while propagating those changes out to all the forms of content with a single key stroke. EPAK is unique as application because it keeps producing value throughout the entire software ownership life cycle, not simply at initial application implementation or upgrade.

## *Maintenance and support.*

Ongoing maintenance and support of the applications is a key aspect of any implementation or upgrade. EPAK can support the ongoing performance support and maintenance strategy, as well as ongoing education and training efforts. Key components of an ongoing performance support, maintenance and training strategy can include the following:

- Ongoing refresher training—Regularly scheduled end-user ILT sessions on weekly, monthly or quarterly basis depending on organization requirements. All EPAK deliverables for training delivery described previously would apply to this activity.
- Performance support—By leveraging the “Do It” mode within the applications, users can perform tasks with guidance allowing them to become more confident and gain self-sufficiency more quickly. The “Do It” mode can also be leveraged in working lab environments —sessions in which personnel perform actual work in the production system with the support of trainers or project team members. Working labs are an effective means to ensure user acceptance and success in performance of job tasks.
- Self-paced eLearning—As previously described.
- Online procedures—Business process documents can be published out of EPAK online in HTML or PDF formats and accessible via a training website.
- Quick reference job aids—As previously described.

## *Conclusion.*

EPAK is a full service on demand training and project documentation development and delivery tool. Using EPAK in every phase of the implementation or upgrade application life cycle contributes greatly to the probability of a successful deployment and increases the benefits for an organization's investment in enterprise applications.



## *About Infor.*

Infor is a leading provider of business software and services, helping more than 70,000 customers in 164 countries improve operations and drive growth. To learn more about Infor, please visit [www.infor.com](http://www.infor.com).

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