

## System selection online user manual

Please print the following document and have it easily accessible when using the system selection online service. Having a clear understanding of the document types, priorities and definitions in use, will assist in maximizing the value you get using from using system selection online.

### Key User information:

Username: \_\_\_\_\_

Password question: \_\_\_\_\_

Date of purchase: \_\_\_\_\_

URL: [www.systemselectiononline.com](http://www.systemselectiononline.com)

Support: [support@professionalservicesonline.com](mailto:support@professionalservicesonline.com)

---

## 1. User documents and files

Using Professional Services Online requires an understanding of the various files you will encounter and their purpose:

<p><b>READ</b></p>	<p>These are detailed PDF format documents designed for on screen reading or which can be printed, for reading in your own time and making notes on. These files cannot be edited or copied.</p> <p>To open these files you will need the password supplied to you with your login.</p> <p>Each phase will have a READ file to brief you on the phase and its requirements.</p>
<p><b>ELP</b></p>	<p>These are embedded learning programs, and are short, focused learning programs, focusing on a particular topic.</p> <p>The file loads automatically and can be allows the user to navigate through in their own time using the mouse.</p> <p>These files cannot be edited or printed.</p>
<p><b>User</b></p>	<p>These are editable files in Excel or word format, which should be saved onto your hard drive for editing and ongoing reference.</p> <p>Easy to follow instructions are included in each file, and will generally require the input of organization data to be completed.</p> <p>These documents form a key part of the deliverables for the project and ultimately the project documentation.</p>
<p><b>Template</b></p>	<p>These are template documents, to be downloaded and used to support the project, saving the user development time and ensuring consistency in documentation.</p> <p>These documents will generally support the administration of the project.</p>

## 2. User documents and files

Understanding the file priority will assist in streamlining the process. We understand organizations of different sizes will have different requirements, and have developed the service to be relatively flexible in this regard.

The table below shows how organizations can use this priority rating to tailor the service to their organizations needs. This should be used as a guideline only.

<b>Priority 1</b>	All documents should be used as a minimum.
<b>Priority 2</b>	<p>Organizations with little or no previous experience with these types of projects should use these in addition to the priority 1 documents.</p> <p>Priority 2 documents go into a lot more detail and cover topics, inexperienced users might not have come across before.</p>
<b>Priority 3</b>	<p>Organizations with onerous governance requirements and more complex structures that require a full system selection process should use these in addition to the priority 1 documents.</p> <p>This also assumes a certain level of knowledge and experience in the organization with respect to running internal projects and information technology in general.</p>

### 3. Other user information

Please note the following:

**Highlighting:** Certain key words and phrases are highlighted in READ documents. This is to emphasize these to the reader and assist those who just skim through documents at a high level.

**Symbols:** To make documents easier to use and to emphasize certain points, the following symbols are explained below:

- \$ Significant **dollar savings** possible
- | **High impact** and value add if done correctly

**Signoff Checklists:** Each phase has a signoff checklist included. These can either be downloaded and completed offline or completed electronically and printed.

If the checklists are completed electronically, they are saved as a client file after being submitted and may be used for certain statistical purposes or with certain support queries. It is important to note these checklists are not reviewed or shared externally or for any other purpose than stated above.

#### Other tips for using professional Services Online:

- When opening user files, if you get a screen asking if you can open this type of file, click the don not ask box below to avoid this re occurring.
- At the login screen, click the "remember me" button, so logging in the next time you access will be easier.
- Use the bookmark function at the bottom of the page to go directly back to where you were working when you re enter the site.
- Please **work through the phases from one to eight**.
- Decide on the priority ratings that best fits your organization and stick with it throughout he process.
- Please ensure you understand how the KADS method™ works so you can more easily understand the page structure and related elements for each phase.
- Please set up relevant directories on your C:/ drive of network drive as is per the recommended directory structure and save all project documents to these files as you use them. Remember to ensure there

<b>Services:</b>	System Selection
<b>Phase:</b>	Start Here
<b>Document:</b>	System selection online user manual

is proper backup and security on the drive used. The system selection online product is not meant to be a filing system for project documents. Should you require access to such a system let us know at [feedback@professionalservicesonline.com](mailto:feedback@professionalservicesonline.com) and we will direct you to some suitable partners who provide this service.

- Remember your access is for a period of three months.
- Email for support on [support@professionalservicesonline.com](mailto:support@professionalservicesonline.com).
- Feedback is [feedback@professionalservicesonline.com](mailto:feedback@professionalservicesonline.com)

<b>Services:</b>	System Selection
<b>Phase:</b>	Start Here
<b>Document:</b>	System selection online user manual

## 4. The KADS method

### 4.1 KADS method™ and delivery methodology

The Professional Services Online delivery process or KADS method™ should not be confused with the Professional Services Online system selection methodology. The KADS method™ is how Professional Services Online works with users in providing the necessary learning, access to experience, user documents and tools in a structured and logical format.

The key sections of the Professional Services Online KADS method™ include the following:

1	<b>MYKNOWLEDGE™</b>	Ensuring you know what you need to know before starting a particular phase or task.
		Using ELP's and READ files, the user is prepared with insights and knowledge about the phase or task and the expected outcomes. Pod casts will be available shortly to support each READ document.
2	<b>MYAPPROACH™</b>	Helping you develop the right approach as well as related planning to support that approach.
		Through the configuration of user documents, the user can modify documents and take ownership of them to develop an approach for the organization. This avoids having to develop anything from new.
3	<b>MYDELIVERY™</b>	Helping you deliver on the approach and project plans developed.
		Supporting the user with guidance and templates, the user is able to work through the process of delivering on the approach and project plan.

<b>Services:</b>	System Selection
<b>Phase:</b>	Start Here
<b>Document:</b>	System selection online user manual

4

**MYSIGNOFF™**

Signing off, as tasks and phases are completed.

## 4.2 Working with system selection online

The system selection service operates from its own domain. Please refer to the [professionalservicesonline.com](http://professionalservicesonline.com) website for details on other services and please take five minutes to complete one of our surveys at [www.professionalservicesonline.com](http://www.professionalservicesonline.com).

<b>Services:</b>	System Selection
<b>Phase:</b>	Start Here
<b>Document:</b>	System selection online user manual