

Acceptance The acceptance process is initiated by the installation of the hardware, software, and network. This should be done by the vendors with the whole system connected, powered-up and tested for basic integrity of all the parts. The ease with which this is accomplished will depend on the amount of site preparation and planning previously done. Hardware installation can require significant changes to the building and services such as the availability of AC power. The planning for this should begin in the Technical Environment Planning phase.

Once the system is running, the vendor and client can review the basic documentation and the test users be oriented to the system. This is followed by loading test data. This data should be carefully selected from known records to ensure that all fields will have data and that all retrieval and reporting combinations can be tested. The test data should represent normal data as well as known special or troublesome cases. A 5–10% sample should be sufficient.

Loading the test data and reviewing the system serves the dual purpose of training the testing staff in the basic functions as well as testing that data can be input as specified, and output to specified devices is possible. This is not intended to test application functionality but basic system integrity.

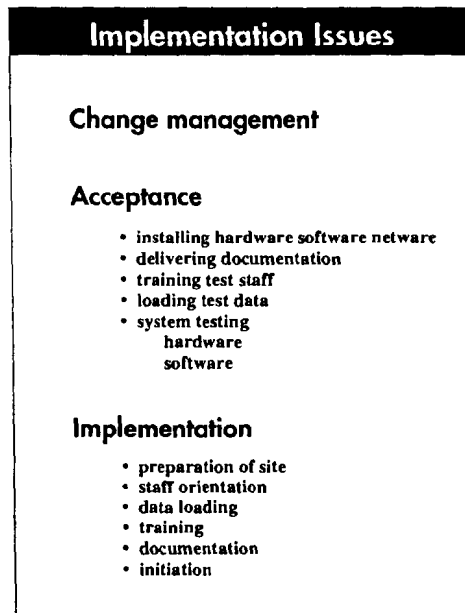


figure 48

Full system acceptance testing can now commence as dictated by the contract terms. The full battery of tests should be conducted, the outcomes recorded and results compiled. Four outcomes are important to record:

- acceptable performance
- exceptional performance
- unacceptable performance
- issues to document in users manuals

The testing should be conducted promptly and within the specified time-frame so inadequacies can be addressed in the manner proscribed in the contract.

Implementation Implementation is the process of bringing the system up to full operating capability.

People who have subjected themselves to this can attest to the truth of the adage that automation is not so much about acquiring a systems as it is about changing everything you do. The process of automating will invade every part of a working life: the planning, preparation and management process alone has the potential to completely interrupt any professional work for years.

Dealing with this is called Change Management and requires special attention to certain areas.

Data Entry

The system will have the test data file but will now need to have the live data loaded. The test data should be maintained as a separate and fixed data set for use in subsequent testing of any new releases, features, or modules. Data will have to be converted from the existing system (manual or automated) either by re-entry or by automated conversion. This is no small task whether it is done inhouse staff or a service bureau. Costs will range from \$1.00 to more than \$3.00 per record depending on the amount of work done to them.

Because each case is different there can be no definitive position but there is substantial opinion that it is best to do as much and as complete data conversion as can be afforded because it is more costly, especially in time and motivation, to go back and retrospectively enhance a skeletal record. Requirements for operation will also influence the system. Accounting systems for example can be started up at the beginning of a new period without much historical data, but object information systems may need much more data.

Procedures

The new system is going to demand changes in the way people work: they will be required to use a new tool and relate to it in a different way. While some people will welcome the changes enthusiastically there will be others who will respond with reluctance and belligerence. A common implementation hazard is discomfort users feel when they are asked to change. This can be minimized by involving representatives from all parts of the eventual user population as early as possible in the implementation planning process. They will be able to identify problem areas and often offer best solutions. They will be seeing the system from the users perspective not the developer's.

Documentation and Training

The vendor will provide system documentation that almost certainly will have to be supplemented with inhouse procedures and user guides. As the system is tested some of these requirements will become apparent but systematic review of each function and process will be necessary to compile complete documentation. This will then need to be coupled with a staff training program. It is important to distinguish between the needs of regular and heavy users of the system—middle users—and the occasional or end user. The two groups require very different levels of documentation and training and warrant separate approaches.

System Initiation and Cutover

At some point the moment of truth arrives when the system is turned on, the users begin to work with the system, and it begins to serve its purpose. This is rarely done as a complete cutover but is usually phased in with some systems running in parallel. This parallel operation should be contained to the shortest possible period as lingering influences of the previous system can frustrate successful operation of the new.

References

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2. Ron Kley, "Managing Microcomputer Databases", *SPECTRA* 13:1 1986.
3. Karl Schmiegall, "Data Entry: The Bugaboo of Museum Computerization", *International Journal of Museum Management and Curatorship* 8:1 1989