



Rapid Success™

Onboarding Service for EHS Insight® Customers

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Introduction

Congratulations on your selection of EHS Insight. We are excited that you have decided to use EHS Insight, and you made a wise decision by selecting Rapid Success™ Onboarding Service. Included with Enterprise Support, or available to customers with Standard Support for an extra fee, Rapid Success™ greatly increases the odds of a successful solution rollout while decreasing the time it takes to get there.

This guide will help you prepare for your implementation. You might be wondering what the next few weeks will be like. *What does it take to successfully implement EHS Insight?* Read this guide to find out, and consider reading the companion guide *Successful EHS Insight Implementations*.

The Rapid Success™ Experience

Your Rapid Success™ Onboarding process extends over a period of time, beginning with a Site Settings meeting. After this meeting, your Customer Success Representative (CSR) will send you more information on how to set up your site and access support materials.

Throughout the following weeks, your CSR will also be available to help demonstrate and explain various parts of the system as you work through them. The steps in this process are described in the following sections.

Throughout the project, you will rely on your CSR to make many changes to your configuration. Besides the guidance provided, up to 40 hours configuration consulting will be available to you. If you need more, your CSR will arrange a Professional Services project.

Next, let's review the overall plan as a sequence of meetings and activities, then dive into each of these steps in your onboarding experience, which are described in subsequent sections.

Project Schedule

After you sign up, your CSR will reach out to get things going. Your CSR, an expert in assisting customers with successful onboarding to EHS Insight, will schedule one or more meetings to cover the following topics.

- Kickoff
- Gap Analysis
- Site Settings
- Technical Topics
- Form and Report Design
- Data Loading
- Users and Contacts
- Go Live

Kickoff Meeting

Prior to the kickoff meeting you'll receive a welcome email, which will explain the key points of our process, including the kickoff and onboarding prerequisites.

The kickoff call is about defining the goal, scope, timeline, and key milestones for onboarding. This is where the CSR will make sure you are aware of important topics like the following.

- Do you have an ideal timeline and Go Live date?
- Who are the key contacts during onboarding? Do they vary by module?
- Are there going to be any integrations?
- Will you be using Single Sign On (SSO)?
- Do you plan to create custom training for end users?
- Do you have a written Training Plan and Communication Plan¹?
- Have you completed onboarding prerequisites? If there are other key contacts, do they also need to complete review that information?

For every module in your subscription, the CSR will confirm that you want it enabled for the launch. Additional questions for those modules include the following.

- Will related backing list data need to be loaded? If yes, by whom?
- Will historical data be loaded? If yes, by whom?
- Will it be customized? If yes, by whom?
- Are the Site Settings understood and decided?

¹ For more information on a Training Plan and Communication Plan, see the companion document *Successful Implementations Guide*.



Finally, your CSR will schedule the follow up call, usually for about 1-2 weeks in the future. Then your CSR will confirm your expectations, and provide some next steps for you.

- Review the onboarding prerequisites
- Prepare data loading spreadsheets
- Prepare historical data-loading spreadsheets

Gap Analysis

Gap analysis compares your organization's desired state against EHS Insight configuration options. In gap analysis, you typically list out the organization's key business requirements, the capabilities of the SaaS solution, and a comprehensive plan to fill out the gap between these two states.

During a gap analysis, you will identify requirements easily met by EHS Insight, and determine if there are any gaps that need to be addressed. Some organizations achieve this mapping by issuing a Request for Proposal (RFP) and selecting EHS Insight based on how well their needs are met.

If you haven't performed a gap analysis, don't worry, especially if your requirements are not overly complex. Perhaps you are moving from an older, outdated system, or from paper and spreadsheets to EHS Insight, and are primarily concerned with meeting compliance requirements. In such a case, a best-practices based solution is exactly what you want, and that is easily achievable within EHS Insight with minimal configuration.

If you have complex requirements, you'll discuss them with your CSR, and plan accordingly. You might even consider traveling to Houston to have an in-person Gap Analysis meeting with your CSR as a facilitator. As an alternative, your CSR could visit your office for an additional fee. If you require a more comprehensive Professional Services project, you will need a scoping workshop. This usually is identified prior to the sale, but can be performed anytime needed. See the Professional Services section at the end of this document.

Communication Plan

We recommend communicating upcoming changes to your organization. Make sure your communication plan is diverse enough for your situation, and sufficient for your organization. A small organization can get by with much less than a large, distributed organization.

When you get close to Go Live, you will define your training plan, as described below. It is important to communicate the training schedule as with anything else, to ensure people know what to expect. Your CSR can offer ideas and guidance, but executing the communication plan is going to be up to you and your team.

Training Plan

Although EHS Insight is extremely easy to use, and self-service training is available for users within the Academy, it often makes sense for organizations to provide traditional training. For this, you will want a comprehensive training plan that outlines who will be trained, on what, and when. This is especially important when the policies and processes defined by your management system are changing significantly.

Your CSR will help plan the training, and can provide links to the appropriate self-service training content. If you purchased onsite training, your CSR will coordinate the training sessions.

Site Settings

For simpler implementations, the Site Settings meeting might be combined with the Kickoff meeting. For others, it will be a second meeting or combined with Gap analysis. The Site Settings meeting is intended to determine various features that should be turned on or off to show or hide various components of the site.

Prior to the Site Settings meeting, it is important for you to be comfortable with a few topics. You will watch a video on Business Hierarchy, one or more videos on certain modules, and complete a short survey prior to the meeting.

Technical Meeting

If the implementation warrants it, your CSR will arrange a technical meeting. Include your IT department in this meeting as it should cover topics they will help with such as the following.

- How will Users and Contacts be maintained? Will there be a feed from the HR system?
- If you are using Single Sign On (SSO), who will configure it?
- Do all users have an email address?
- Are there going to be kiosks for training, work observations or other processes? If so, who will obtain, configure, and manage those devices?
- Are there integrations, and if so, with which other systems? Will your IT manage the integration using middleware, or will you need file-based integration?
- Is mobile access expected, and if so are there mobile device management concerns to deal with? If so, who is responsible for those?
- Will historical data be loaded from another system, and if so will IT help you obtain that data? Will the API be used?



Form and Report Changes

EHS Insight is a configurable solution. Although significant changes to the solution will have been made within the Site Settings step, you can further alter the experience for your users. The EHS Insight Form Designer helps you add additional controls to forms and lists. That way you will gather additional data beyond the built-in fields contained within EHS Insight.

Any new fields you add will likely need to be included in reports. In some cases, you will add new fields to existing reports, and in others you will create new custom reports². Your CSR will make most changes for you, but if you need extensive changes and custom reports, please consider a Professional Services project.

Data Loading

The first data loading activity is your Business Hierarchy. It is important to correctly model your organization in the Business Hierarchy, as this will drive both security and reporting roll-up. Your CSR will guide you through the process of designing an appropriate hierarchy structure.

EHS Insight supports a flexible Business Hierarchy structure that can be configured to allow portions of the hierarchy to be changed over time while maintaining history. To support maximum flexibility, the Business Hierarchy definition uses a cross-cutting multi-level definition rather than a traditional parent-child tree. This allows portions of the hierarchy to be defined up front, other portions to change slowly over time, and still further portions to change daily.

EHS Insight offers either a flat list of Business Entities or hierarchical relationships and, with additional Site Settings enabled, the ability to track date effective revisions. You'll define the hierarchy structure that matches your organization's needs and load your Business Entities into EHS Insight.

The next step is loading your backing lists. A List is a collection of like-items to populate Form Controls (Dropdowns, Checklists, Pickers, etc.). List examples include job titles, employers, chemicals, materials, locations, activities, and assets. The exact lists you need to load will depend on the EHS Insight modules in your subscription and the Site Settings selected. Your CSR will guide you through the process, providing examples and feedback on your choices. Your CSR cannot provide the values for you unless you opt to go with values found in the trial sites, but those exact values are rarely ideal for your specific

² Custom Reports are available with Enterprise Support only.



situation. So, you should plan to spend some time thinking about the best values for your backing lists, and maybe review historical data to find appropriate values.

Finally, your historical data should be prepared and loaded. Historical Data is data your organization collected and maintained prior to using EHS Insight. By adding Historical Data to your site, your organization's Home Page and Reports will show data from the start as opposed to starting the system with no data. You'll need to gather the data from your prior system or spreadsheets. That data then should be prepared and loaded into EHS Insight. Your CSR will help you decide the best level of detail to load. You can choose simple summary-level or load comprehensive data sets. Your CSR will provide the appropriate templates for your chosen strategy. You will compile the historical data into the template and your CSR will help with data validation if needed.

Data Loading Options

All the items described above could be loaded one of the following three ways. The one that is best for you depends on several factors, such as the amount of data and your technology aptitude or support from IT.

- Manual data entry
- Spreadsheet imports
- Application Programming Interface (API)

Choosing the best method will require a good understanding of the viability of each option. You should probably get IT involved for this discussion. If you choose the manual data entry method, you should estimate the time required, and consider hiring a temporary data entry clerk if appropriate.

Users and Contacts

Contacts are people in your organization that may log into the site, be selected in forms, and/or be assigned tasks. EHS Insight supports various types of contacts such as Users, Guests, and Managed Contacts. You'll need to identify who in your organization can access various parts of your EHS Insight solution.

Getting Users and Contacts into EHS Insight can be done in any one of the three ways mentioned above in **Data Loading Options**. In larger organizations, it is recommended to use the API to keep up with the larger volume of changes. Integrating EHS Insight into your HR system will ensure the data available to users is accurate and current. Be sure you have IT involved in these conversations.

Authentication

Another option to consider regarding users and security is authentication. Larger organizations often choose to implement Single Sign On (SSO), which is service that permits



the use of one set of login credentials (e.g., name and password) to access multiple applications. The service authenticates the end user for all the applications the user has been given rights to and eliminates further prompts when the user switches applications during the same session. That way your users won't have to remember multiple username and password pairs.

If SSO is not something that your organization currently supports or if you have some users of EHS Insight that do not have accounts with your SSO provider, EHS Insight supports creating Internal accounts, even when SSO is enabled. Internal accounts will manage their passwords and optional Multi-Factor Authentication settings directly within EHS Insight. Either way, you will probably want to get IT involved for this discussion as well.

Another consideration is the use of kiosks. This is most commonly used in scenarios where some users have no email address, and therefore cannot be a normal user.

Onboarding Checkup Call

Sometimes a checkup call is all that is needed to keep the project on track. Your CSR will continue to schedule checkup calls until all outstanding actions are complete and you are ready for Go Live.

Go Live

Finally, it is time to Go Live. First you will ensure your training plan was executed properly. Once your end users are aware of the impending changes, you will add them to the system and unless you are using Single Sign On, you will need to invite them into the system so they can set a password and begin using the solution. Finally, be sure to disable access to the old system if you had one so users won't continue using the old system.

Sometimes, you will need to load the final bit of historical data right as you go live. Be sure to time this correctly so any last-minute data entered in the old system are migrated to the new solution.

Onboarding Review Call

After Go Live, your CSR will schedule a review call to gather feedback about the whole process. We'll ask you to complete a short survey that is very important to us, so we appreciate your assistance with that.

Ongoing Support

After Go Live, your CSR will continue to provide support, answer questions and provide guidance. Also, if you subscribe to Enterprise Support, you can rely on your CSR to continue making minor changes to your forms and reports for you if they consume less than four



hours per month. For larger tasks, we'll issue a Statement of Work detailing the work to be performed and associated charges.

Professional Services Projects

As described in this document, your CSR will provide a lot of help during the onboarding. However, there some customers prefer or need more help. Remember, you get 40 hours with your Rapid Success™ Onboarding Service, so you only need to plan for a Professional Services project if your needs exceed that level. The following activities offer additional services that can be included for a fee.

- Configure forms, reports, and dashboards
- Migrate data for the agreed upon modules into the EHS Insight system
- Create or support IT to set up any necessary integrations with other systems
- Work with you to resolve any UAT issues through additional configuration or customizations
- With Enterprise Support, you could also request customizations such as User Defined Reports (UDR)

Your Professional Services project will be defined with a scoping session, which is a, in-person or virtual meeting. The team will provide an estimated cost, timeline, and description of the work in the form of a Statement of Work (SOW). If you approve the SOW, work will begin as soon as it can be scheduled.