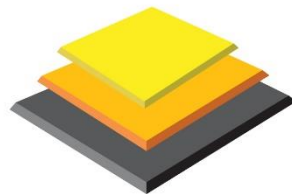


Zavanti Housing Implementation Guide

Getting Started

Zavanti Australia Pty Ltd



Zavanti
Technology for Advantage

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Implementing Zavanti Housing

Purpose of this guide

This guide outlines the steps that need to be completed for the successful implementation of Zavanti Housing solution for your organisation.

Zavanti Housing is built on the Microsoft Dynamics 365 environment so initial questions relate to establishing the right solution for the client. Zavanti Housing may be hosted within the client's Microsoft cloud environment or Zavanti can establish an environment for sole client access through or provider of Microsoft Azure services.

This guide provides an overview of the key decisions and matters you will need to address in your implementation of Zavanti Housing.

This guide also outlines the role of workshops in determining the details of your requirements and confirming the configuration of Zavanti Housing to meet these requirements.

These workshops are structured to introduce Zavanti Housing by functional module, and discuss the in-built processes, workflows and the configurable items that are required to be populated in the data structures and for the integrity of the Zavanti Housing environment.

We also introduce the key aspects of master data in managing the solution. The master data structure is the foundation of the Zavanti Housing client details, processing client application, managing tenancies, properties and asset maintenance, while providing compliance and business reporting that supports business operations from 'go live'.

About Zavanti and Using this Guide

Zavanti has 20+ years delivering client centric innovative solutions for all sectors of the real estate and construction industry, property managers and owners. Our dedicated team of consultants and knowledge experts, deliver and support a range of proven world-class software solutions that minimise risk, control costs, increase efficiency and facilitate the sharing of information, collaboration and planning.

At Zavanti our team works in partnership with all our clients, to support the life cycle of their business's solutions from strategic planning and budgeting to implementation, operations and maintenance.

The Zavanti team is available to assist with all aspects of the implementation with a "can do" attitude, that delivers real benefits to the organisation's bottom line through the implementation of the Zavanti Housing.

Before You Begin

Pre-Implementation checklist

Some key questions:

- Does your organisation have Microsoft charity status? (Yes/No)
- Does your organisation use Microsoft Dynamics? (Yes/No)
- Does your organisation have dedicated internal IT support? (Yes/No)
- Does your organisation have external ICT support arrangements? (Yes/No)

In preparation for implementing your Zavanti system you will need to prepare and/or research certain items to make the process of adopting the software efficient and streamlined.

You will also need the involvement of ICT support (internal and external) and MS licencing confirmed to optimise your Zavanti Housing environment.

Establish Project Governance Structure

Step one in any project is the setup of your project team and project management structure. These will be documented in the Project Management Plan with other aspects for the project delivery. This may include (from the Client) a Project Control Group (PCG) to act as the steering committee for the project, and a Project Manager to help facilitate the identification and delivery of client centric data for the implementation.

Identify milestone target dates

The implementation schedule will be constructed based on the targeted delivery dates for each Zavanti Housing key functional area. The target dates need to be identified at the earliest opportunity, to allow for planning of resources from both Zavanti and client side of the implementation.

The usual duration for a Zavanti Housing implementation is 9 calendar months from the project start date. The duration may vary depending on the availability of client resources, requested customisation and target delivery date “Go-Live”. These delivery constraints will be discussed with the client as part of the project scheduling at the commencement of the project.

Endorse Project Plans

All documents related to the implementation will be endorsed by the client project governance group and Zavanti. These will be documented in the Project Management Plan with other aspects for the project delivery.

[See Appendix - Project Management Plan - Overview](#) for an outline of contents for a project plan.

Workshop scheduling dates

Our work process commences with a series of workshops to explore your needs and give a greater understand of the Zavanti Housing Solution.

A number of workshops (based on the Zavanti Housing functional areas) will be conducted, usually 60-90 minutes in length. The workshops will use the client “sandbox” created in Microsoft Dynamics 365 environment with the standard Zavanti Housing software is installed.

The workshops are delivered as an overview and walkthrough of the Zavanti Housing solution. They introduce client groups to the “look and feel” of Zavanti Housing, and the items that are configurable, standard process and workflows and assists with the identification of any functional gaps through workshop feedback.

The client “sandbox” will be used for conducting client workshops (with no-identifiable client data), for walkthroughs, User Acceptance Testing (UAT), and process and workflow validation throughout the design and build to sign-off phases.

Workshop Functional areas

The workshops provide a walkthrough the solution, aligned to operational functions of Zavanti Housing. Workshop participants will become accustomed to the “look and feel” of Zavanti Housing, while understanding the items that are client configurable (included as standard Zavanti Housing capabilities), including the default processes and workflows.

Where a function is identified by through the client workshops (that is not in the standard Zavanti Housing capabilities), these may be requested through the change request as a customisation in a variation to the contract scope.

Some workshops may require several sessions. The workshop functional areas are:

- Property Management
- Applications & People
- Tenancy Management
- Tenancy & Finance
- Property Management Post Tenancy
- Tenancy Interaction
- Tenancy Rent/Inspections/complaints/Legal/Communications
- Assets Maintenance
- Business Analysis & Reporting
- Community Development
- Data Migration
- Integration Finance
- Integration Strategic Assets
- Dashboard

Additional workshops may be required through the workshop process or by arrangement for Security, “option sets” dropdown menus, build and configuration items sign-off reviews

Workshop Session Participation

Each workshop has a detailed topic of discussion. is targeted to operational staff that have business knowledge of the area or oversight of that area.

Workshop participants will be shown (as a walkthrough) an the Zavanti Housing function, and will discuss the configurable items, including the default processes and workflows.

Workshops are usually scheduled with at least two days apart to allow the documentation and configuration to be applied to the “sandbox” for the next workshop. For each workshop the participants will need to commit to (60-90 minutes) for each workshop. For the larger functional areas, several sessions may be required.

Where there is an identified need (determined by the Client and Zavanti), stakeholder one to one engagement sessions can be conducted as a “deep dive” for the purpose of clarifying requirements and customisations for the design and build.

Identify your Data Migration Approach

It may be that you do not want to adopt all your properties at once. You may have decided to do a selection based upon program, location etc. Whichever way you choose you will need to have thought through and prepared your approach now.

If you have an existing database, it is likely that the data can be exported to the Zavanti Housing environment.

A smooth transition commences with early planning, preparation and testing with key users, groups and supported through a tailored change management approach.

Some possible suggested methods are as follows:

- **All Data** that is all properties/contacts/accounts will be adopted at a certain point in time and then Zavanti will take over from the next month.
- **Gradually** using a selection that fits with your business operations to bring on a group at a time.
- **Other** another way you might prefer.

It is also important to identify what users you want to include at this stage and how you intend to 'roll out' the software to the total user group.

Training

An initial training plan will be created identifying the key users and their roles and appropriate timing for their training as part of the implementation process. This will include confirming the use of Train the Trainer or Direct training approach. An important step is to assign Zavanti Champions to be involved in the implementation and ongoing support process.

Solution Build

The Zavanti Housing Microsoft Dynamics 365 environment(D365) build is as a foundation step for the implementation. It will be used for the workshops to review default settings and inform the configuration of the "master table data" values.

It is necessary for Zavanti (and client ICT staff) to build the environment in D365 (usually in the clients Microsoft tenancy), and then install the Zavanti Housing software as a pre-configured client "sandbox" environment for workshops.

[See Appendix - Solution Architecture Diagram for a conceptual diagram of the solution.](#)

In preparation for implementing the Zavanti Housing, there are configurable items that will need consideration. These will be discussed during the workshops and any configuration request will be deployed in the "sandbox" for UAT and client final sign off.

The order of the workshops will follow these key system entities listed below (and in the system master data details in the following section).

- [System Master Data](#)
- Property
- Assets and Maintenance
- Inspections
- Tenancy

Setup User Access

As part of your policy planning and setting you should have set out who in your business will be allowed to use the software, what entities and functionality they will be allowed to use to match the User Roles set above.

This involves determining and creating User Roles (within the systems maintenance module) to set authority levels and access rights. By doing this now you will save a great deal of later maintenance.

These security settings based on delegations, business groups and operational areas within your organisation.

The following matters need to be considered:

- User groups that are allowed to access the software and defining their functional roles
- Delegations including, budget authority and over run rules
- Roles and responsibilities for tasks and process, ie who can create work orders, projects, assign tenants etc
- The organisations GST Tax rules and group reporting requirements
- Others that may be identified.

Correspondence Templates (business logos, Word, Email, SMS etc)

It is important to identify your existing standard correspondence documents for incorporation into the standard template sets available within Zavanti Housing. These may include the correspondence to tenants, applicants, contractors, as letters, emails etc. These will be identified and discussed during the workshops and will be included in the final build.

In order to include a client specific logo(s) on correspondence and reports, Zavanti recommends that the logo image height does not exceed 15mm and width does not exceed 45mm. Images that exceed these limits might not display properly on the reports and screens.

It is desirable that business logos are prepare and provided to Zavanti in a suitable format before the commencement of the workshops. This will allow the workshop environment to be shown to the client as it may look in the final build.

Reporting

It is important to review your existing critical business reports and compare to the many standard reports available within Zavanti.

If any gaps requiring additional reports, or identified changes to reports are required, Zavanti should be informed during the workshops with examples of the required reports.

Late changes or additions will not be included in the implementation project and may be deemed out of scope of the project which may incur an additional cost for updating the requirements specification. This would be managed through the change request process.

Business Rules, Policy, Process and Workflows

When planning to implement Zavanti Housing, it is recommended that the client understands their current process and workflows and consider how they are required to operate with Zavanti Housing.

Where possible the documentation of current client processes and workflows can be valuable to identify configuration changes for the final implementation.

Your Zavanti Housing solution has configurable workflows based on a standard set provided as default, or these can be modified to client needs.

System Master Data

There are a number of tables with default values, to be reviewed during the workshops. These tables will be populated with the client's required configuration and used in the "sandbox environment" for training, UAT to validate the design and operation.

The standard set of items will be provided as a spreadsheet for review, all updates requiring client sign off.

Groups, accounts, cost centres

This should include but not be limited to:

- Account Groups
- Contact (Supplier/Tenant) Account Groups
- Chart of Accounts
- Cost Centres

Option Sets configuration

These will be discussed through the workshops and will require finalising for the solution build phase.

These configurable “option sets” need to be configured for the Master Data below:

- Languages
- Countries
- Postal Codes (or NZ Postal Cities Mail Towns Territories Postal Regions)
- Letter Codes
- Hazards
- Currencies
- Risk Categories
- Risk Sub Categories
- Trade Services
- Relationship Roles
- Ethnicities
- Alert Settings

Following are some examples of Master Data

Inspection

Location

Assets

Asset Types

Asset Models

Location Details

Health & Safety

Master Data

Languages

Countries

Postal Cities

Mail Towns

Territories

Postal Regions

Letter Codes

Hazards

Currencies

Risk Categories

Risk Sub-Categories

Trade Services

Relationship Roles

Ethnicities

Active Location

Location Name

Living Room 1

Living Room 2

Dining Room 1

Kitchen

Kitchen 2

Hall / Stairway

Hall/Stairway 2

Stairway 1

Stairway 2

Bedroom 1 (Anti clock)

Bedroom 2

Bedroom 3

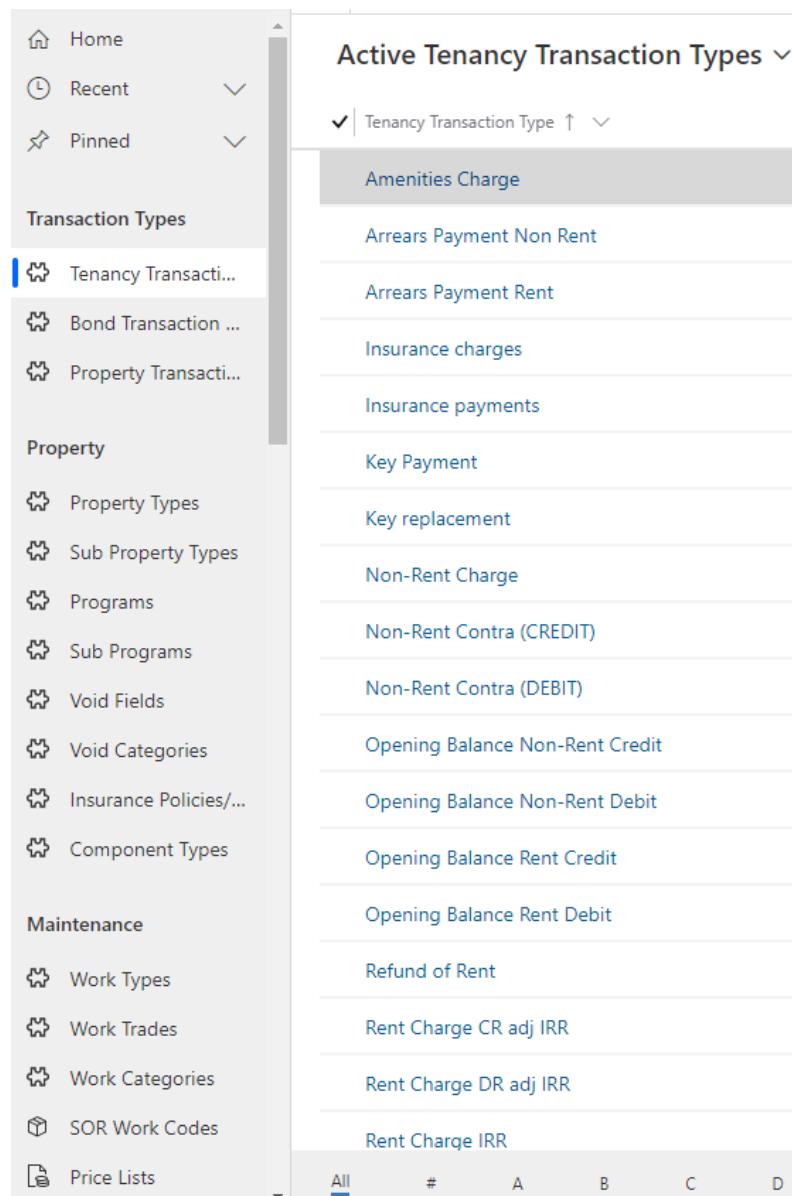
Bedroom 4

Bedroom 5

Bathroom/Toilet 1

Bathroom/Toilet 2

Separate Toilet



Property

The following details are required for property lists:

- Property Hierarchy
- Property Types
- Sub Property Types
- Programs
- Sub Programs
- Void Field
- Void Categories
- Insurance Policies
- Component Types

- Property Transaction Types

Assets and Maintenance

You will need to set up Master Data for the Maintenance Entities. This includes:
The following details are required for Assets and Maintenance lists:

- Work Types
- Work Trades
- Work Categories
- SOR Work Codes
- Price Lists
- Contractor portal

Will you be using the Zavanti Contractor Portal? If so, you will need to consider how you wish to use the portal, and communication processes with contractors.

Inspections

You will need to set up Master Data for Property Inspections, this brings together the assets structure for your entities and detailed assets for your properties.

Identify and set up the Master Data for Property Inspections. This brings together the assets structure for your entities and detailed assets for your properties.

- Location
- Assets
- Asset Types
- Asset Models
- Location Details
- Health & Safety

Tenancy

The following details are required for Tenancy Master Data to be set up:

- Tenancy Transaction Types
- Bond Transaction Types
- Property Transaction Types

Tenant portal

Decide how the tenant portal, and communication processes with tenant are to be used. Confirm the role for the tenant portal, including setting tenant access rights?

Integration

System integration requirements will need to be defined and confirmed which may include:

- Existing software systems, contractor portals and tenant portals
- Financial software

- Centrelink/WINZ/Government Portals
- Other business systems that are identified that need to be integrated

Some questions you should address are:

- Will the contractor and tenant portals be integrated with your website?
- Are there other key systems which require integration?
- Will the integration be automatic, or will manual updates be satisfactory? Defining your needs and confirming the work effort as early as possible will ensure a smooth implementation.
- What key things are you looking for?

User Acceptance Testing (UAT)

At the completion of the workshops (based on the feedback provided and the business decisions that have been made), a final design will be provided to the client for review.

Once the design is endorsed, the “sandbox environment” will have its final build, allowing UAT to be undertaken (by the client) to validate the design and operation.

It is anticipated that the UAT will require several iterations to completely validate the build and functionality requested by the client. Issues identified from UAT testing will be corrected as part of the “sandbox” build.

Go-Live

The clients “sandbox environment” after the final build is verified, can be cloned into the production environment and populated with data or without data.

The commissioning of the “production environment” will consist of;

- Final data migration
- Final data cleansing
- Training completed and staff are engaged
- Change management plan updated
- Process UAT live data updates and confirm all works to requirements
- User support handover activated
- Integration activated, eg: Centrelink/WINZ/Government Portals

Appendix

Project Management Plan - Overview

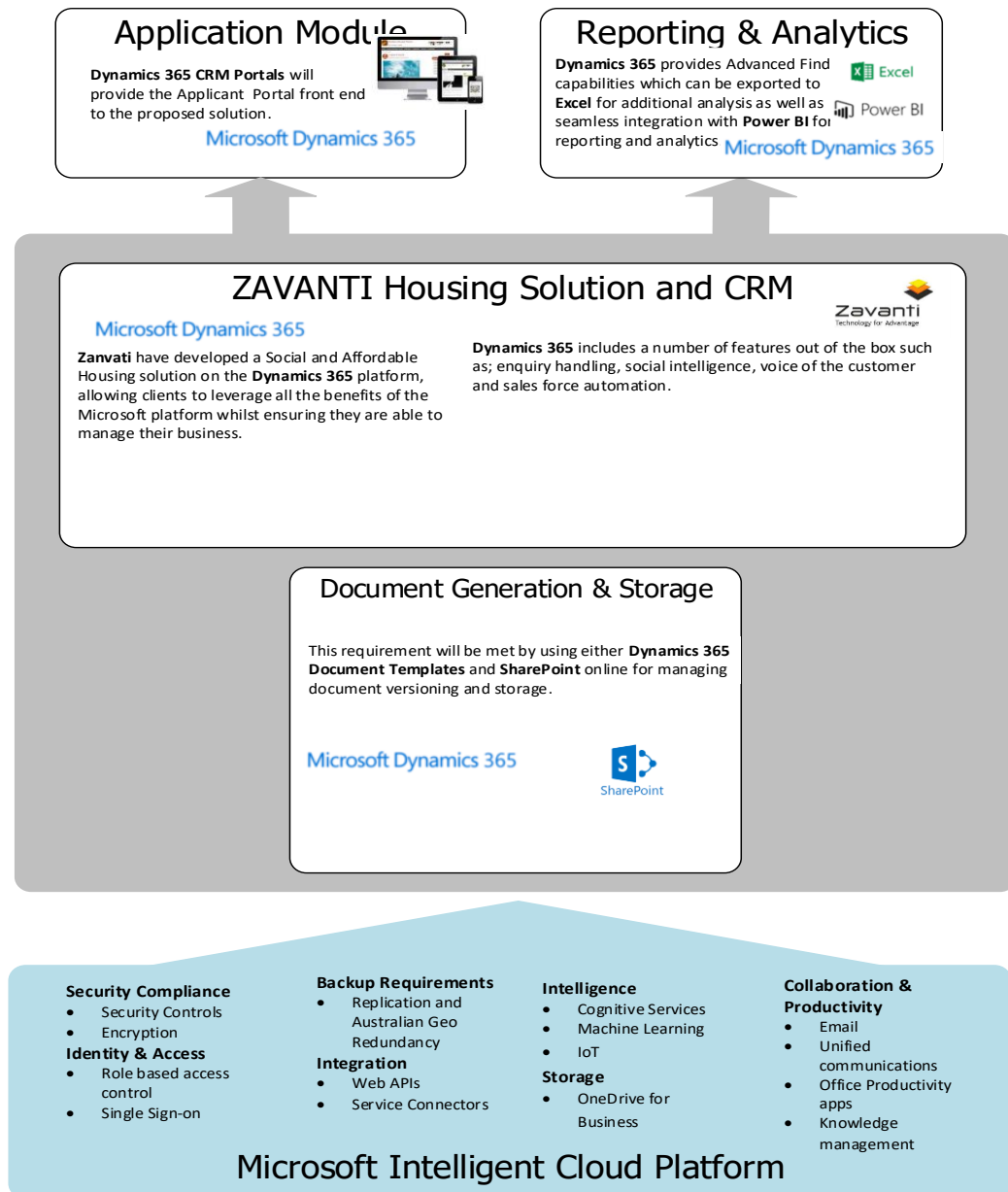
The Zavanti Housing implementation will follow these phases. The plan and timetable will be developed in conjunction with you through our Planning workshops:

Phase	Main Objectives	Major deliverable/tasks
Planning	<ul style="list-style-type: none"> • Analysis & Implementation 	<ul style="list-style-type: none"> • Project Kick-off meeting • Project Management Plan

Phase	Main Objectives	Major deliverable/tasks
	Planning, environment D365 setup	<ul style="list-style-type: none"> Project schedule Ascertain Resources MS Dynamics 365 setup Deploy standard “Sandbox”
Requirements Gathering & configuration	<ul style="list-style-type: none"> Workshops Overview of each module Reviewed configurable items 	<ul style="list-style-type: none"> Staff understanding from each Workshop for each housing module Configuration updates for client “sandbox” Matters identified for Decision
Design & Build	<ul style="list-style-type: none"> Final Configuration Data migration planning Installation services Customisation development, as required and agreed 	<ul style="list-style-type: none"> Production Database creation and configuration Data Migration Plan Production Zavanti Housing platform sign off Training plan
System testing	<ul style="list-style-type: none"> Implement pilot system System Testing 	<ul style="list-style-type: none"> Pilot operation & System testing Database review and update as necessary
Data Migration and Integration	<ul style="list-style-type: none"> Populate data to pilot User Acceptance Testing trial 	<ul style="list-style-type: none"> Pilot full operation Database review and update as necessary
User Acceptance Testing (UAT)	<ul style="list-style-type: none"> Client to perform (UAT) User Acceptance Testing Process and workflow Acceptance Testing 	<ul style="list-style-type: none"> Database review and update as necessary Report issues for fixing User Acceptance validated cases

Phase	Main Objectives	Major deliverable/tasks
Training	<ul style="list-style-type: none"> Client User training Process and workflow 	<ul style="list-style-type: none"> Train the Trainer User training completed User Acceptance training Sign off
“Go Live”	<ul style="list-style-type: none"> Deliver configured production system Final data migration 	<ul style="list-style-type: none"> Support transition commenced User “Go Live” Sign off

Solution Architecture Diagram



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