BWISE Implementation Guide

BWISE Channel Partner Academy

Purpose & Learning Outcomes

A self-paced guide to the BWISE implementation methodology

- Explain the BWISE implementation lifecycle from project pass-off through support handoff.
- Prepare the customer and project team for each milestone.
- Recognize required inputs, deliverables, approvals and readiness gates.
- Coordinate operational, technical, data, testing and training activities.
- Identify when an issue requires escalation or formal change management.

The BWISE Implementation Lifecycle

The task list becomes the execution checklist behind the learning program

01 — Operational Assessment

02 — Software Installation

03 — Conference Room Pilot / Training

04 — Go-Live

05 — Post-Go-Live / WISEdesk Pass-Off

Each stage follows: inputs → work → validation → approval → next-stage readiness.

Implementation Principles

The methodology is more than completing tasks

- **Document before configuring** — the Operational Assessment establishes the customer's current and required processes.
- **Confirm ownership** — every deliverable should have a responsible party and approval point.
- **Validate before advancing** — hardware, data, configuration and interfaces should be tested.
- **Control changes** — gaps discovered during CRP/UAT should be identified, prioritized and approved.
- **Train the right people** — Super Users become internal process champions.
- **Go-Live is a controlled transition** — readiness, contacts, inventory and support must be confirmed.
- **Close the loop** — the WISEdesk pass-off transfers the customer into support.

Module 1 — Project Kickoff & Governance

Start with alignment, not configuration

- Internal WISEteam pass-off: understand what Sales / Pre-Sales committed and what the project must deliver.
- Review the Saggio Methodology and implementation process.
- Complete the Saggio Guidelines and Team Document.
- Confirm scorecard dates and milestone expectations.
- Establish communication cadence, decision makers and escalation paths.

Module 2 — Operational Assessment

The OA is the foundation for the solution and later validation

- Prepare the warehouse survey, current/required operations document and warehouse diagram.
- Review sample forms, reports, labels and 3PL requirements where applicable.
- Conduct the warehouse walkthrough and observe real processes.
- Document exceptions, business rules, constraints and required outcomes.
- Draft, review and obtain signed final Operational Assessment.

Operational Assessment — What Good Looks Like

Create a shared, approved understanding of the customer's operation

- **Current state:** what happens today, including exceptions and constraints.
- **Required state:** what the customer needs BWISE to accomplish.
- **Physical reality:** layout, locations, equipment, labels and movement patterns.
- **Business rules:** ownership, receiving, inventory, shipping, reporting and 3PL requirements.
- **Traceability:** requirements should be clear enough to validate during CRP and certify during UAT.
- **Approval:** the final OA becomes a key baseline for downstream execution.

Module 3 — Project Planning, Infrastructure & Data

Build the conditions for a successful installation



Prepare and obtain sign-off on the project timeline.



Verify hardware procurement: hosted server, RF site survey, scanners, Telnet software and barcode printers.



Confirm the warehouse site and installation sequence.



Complete the Data Plan: location conventions, vendor, item and customer master data.



Document interface requirements and obtain customer sign-off.



Review prerequisites before installation begins.

Module 4 — Build the System Environment

Infrastructure must support the operational design



Configure server, printers, cabling/LAN and third-party hardware/software.



Confirm location tags and rack labeling.



Obtain the customer subdomain and install SSL as required.



Develop backup and disaster recovery procedures.



Enable database backup scripts.



Confirm production/test environment approach.

Module 5 — BWISE Installation

Follow the installation checklist and verify dependencies

- Install and validate the required Servoy license.
- Install Progress and WISE Client components.
- Configure secure access using the customer subdomain and SSL.
- Review the installation checklist rather than relying on memory.
- Enable database backup scripts.
- Document exceptions and escalate blockers before CRP.

Module 6 — Connectivity, Data Migration & Interfaces

Validate the foundation before configuration is demonstrated

- Validate server, RF scanner and printer connectivity.
- Upload/validate users and master data.
- Validate vendor, item, customer and location information.
- Develop/install interface requirements.
- Confirm dependencies are ready for configuration and CRP.

Module 7 — Configuration & Enhancements

Configuration should trace back to documented requirements

- Complete the configuration checklist.
- Confirm the configured solution reflects the approved OA and project scope.
- Update user documentation as processes stabilize.
- Document enhancements: purpose, behavior, dependencies and validation.
- Prepare a pre-CRP configuration review and checklist.

* Do not use CRP to discover foundational setup that should have been validated earlier.

Module 8 — Conference Room Pilot (CRP)

Demonstrate the solution, identify gaps and agree on changes

- Prepare an agenda based on customer operational processes.
- Review configuration and user documentation before the session.
- Conduct the CRP using realistic business scenarios.
- Capture gaps and distinguish configuration, training, process decisions, enhancements and defects.
- Prioritize gaps and obtain approval for changes.
- Complete CRP sign-off and configuration evaluation.

CRP vs. UAT vs. Certification

Three checkpoints with different purposes

- CRP — structured demonstration and validation of the configured solution.
- UAT — customer validates that business processes work as expected.
- Certification — customer formally confirms processes based on the approved Operational Assessment.

* These are related checkpoints, not interchangeable activities.

Module 9 — Super User Training

Build internal ownership before end-user rollout

- Schedule Super User Training with the right customer representatives.
- Use approved documentation and a structured review.
- Train on the new process, not just individual screens.
- Evaluate understanding and ability to execute the process.
- Issue the WISE Super User Certificate when defined requirements are met.

* Use trainer evaluation feedback to improve readiness.

Module 10 — User Acceptance Testing (UAT)

Test the complete operational flow

- Inbound procedures
- Inventory management procedures
- Outbound procedures
- Forms and labels
- Interfaces
- Throughput and performance considerations

* Document issues in the punch list, assign owners and retest resolved items.

Module 11 — Customer Certification

Formal acceptance should reflect the approved OA

- Customer certifies the process based on the Operational Assessment.
- Update project timeline dates/events when necessary.
- Complete the certification checklist.
- Use certification as a readiness gate — not a substitute for unresolved UAT.
- Ensure the project record reflects what was accepted and what remains pending.

Module 12 — Go-Live Planning & Rehearsal

Go-Live is a coordinated cutover, not a single event



Review the pending-issues list.



Confirm Go-Live schedule and first/second contacts.



Review the Go-Live Critical Number document.



Review the Physical Inventory Checklist.



Obtain written confirmation of the Go-Live date.



Conduct the Go-Live rehearsal and review the rehearsal punch list.



Reconfirm readiness after rehearsal.

Module 13 — End-User Training

Transfer process knowledge to the warehouse team

- Customer trains end users using completed and approved user documentation.
- Training should follow real operational workflows.
- Verify forms, labels, scanners and interfaces used in training match the production plan.
- Capture questions and issues that may affect Go-Live readiness.
- Update and submit user documentation to Royal 4.

Module 14 — Go-Live Execution

Follow the approved checklist and control the transition

- Execute the physical count following the checklist.
- Refresh the test environment from production as defined.
- Gather Go-Live statistics.
- Activate production Progress licenses.
- Enable database backup scripts.
- Execute Go-Live and create the Go-Live punch list.
- Complete required notifications.

Module 15 — WISEdesk Pass-Off & Project Closure

A successful implementation ends with a controlled support transition

- Introduce WISEdesk and the support process.
- Review WISEteam list and assign pending items.
- Send the WISEteam pass-off communication.
- Complete the customer questionnaire.
- Review delivery schedule, budget and scorecard.
- Review short-term and future customer goals.
- Obtain signed project confirmation.

Readiness Gates — The Partner's Mental Checklist

Before moving forward, ask these questions

- **Scope:** Is the customer's required process documented and approved?
- **Environment:** Is infrastructure installed, connected and secure?
- **Data:** Are required master data and interfaces validated?
- **Configuration:** Does the solution match the approved requirements?
- **Acceptance:** Are CRP, UAT and certification activities completed appropriately?
- **People:** Are Super Users and end users trained?
- **Go-Live:** Are schedule, contacts, inventory, critical numbers and rehearsal confirmed?
- **Support:** Is the WISEdesk handoff complete and are remaining items assigned?

Common Implementation Pitfalls

Use the checklist to prevent avoidable surprises

- Starting configuration before operational requirements are understood.
- Treating the OA as documentation rather than a scope/validation baseline.
- Assuming hardware, network or printer readiness without testing.
- Loading data without validating format, completeness and business rules.
- Using CRP to discover foundational setup issues.
- Allowing UAT issues to remain undocumented or without an owner.
- Scheduling Go-Live before rehearsal and written confirmation.
- Closing the project without a clean support handoff.

Practice Scenario — A Change During UAT

Pause and apply the methodology



Scenario: During UAT, the customer requests a new outbound rule that was not documented in the OA and was not demonstrated during CRP.



Discuss: Is this a defect, configuration change, process decision or enhancement?



Discuss: What evidence should be reviewed and who needs to approve the change?



Discuss: How could the change affect Go-Live or the punch list?



Discuss: What documentation should be updated?

Implementation Deliverables — Quick Reference

The task list remains the execution checklist behind the training

- **Kickoff:**
  Saggio Guidelines • Team Document • Scorecard
- **Assessment:**
  Survey • Current/Required Operations • Warehouse Diagram • OA • Signed OA
- **Planning:**
  Timeline • Hardware/RF Plan • Data Plan • Interface Requirements
- **Installation:**
  Environment • SSL • Servoy • Progress • WISE Client • Backup
- **CRP:**
  Configuration Checklist • User Documentation • CRP Agenda • Gap Analysis • Sign-Off
- **Go-Live:**
  Super User Training • UAT • Certification • Go-Live Plan • Rehearsal • End-User Training
- **Closure:**
  Go-Live Punch List • WISEdesk Pass-Off • Customer Questionnaire • Signed Project Confirmation

Knowledge Check — Before You Take the Exam

You should be able to explain the “why” behind the checklist

- What is the purpose of the Operational Assessment?
- How do CRP, UAT and Certification differ?
- What must be ready before installation?
- Why are data and interface requirements documented and signed?
- What makes a Go-Live rehearsal useful?
- When should an implementation issue be escalated?
- What must be transferred to WISEdesk at project close?

Next Step — BWISE Implementation Certification

Use the Final Examination to validate practical understanding

- Complete the Implementation Training Guide.
- Review the BWISE implementation task list and supporting checklists.
- Complete the Final Examination independently.
- Use scenario questions to demonstrate methodology, not memorization.
- Use the separate answer key for internal partner-management use.