

Service Overview

FlightPath for Association Financials

Together we'll land this implementation



FlightPath your Access software journey

We believe wholeheartedly that the functionality that our software offers our customers is very important, but it is only half of the value equation, how the system is rolled out is critical if full value from your new investment is to be achieved.

We also know that you may view new software implementations with some trepidation and many customers can find this period daunting. In fact, for some customers, this may be the first software roll out they have managed. We recognise this and we have designed our best practise, remote-first implementation services to help ensure you have a great experience and are looked after along the way, so that the whole process is less daunting... this is our FlightPath implementation approach.

Seamless implementation, delivered 100% remotely

Our FlightPath services have been designed to be remote-first, providing you with an improved low-risk implementation journey, no matter how your organisation is structured or wherever your employees are working.

We use video technology to facilitate face to face contact, so you still get the hands-on benefit of working with an Access expert and our years of software deployment expertise. We have also invested in product e-learning, so your users can learn our products at their own pace.

Our remote-first approach means that you have regular, accessible communication with us to keep you on track at every step of your journey and that your software can be delivered flexibly to suit the needs of your organisation and employees.

All our FlightPath consultants and on-boarders are not only certified in our products, they are also trained and certified in our remote-first FlightPath implementation methodology, including training in effectively delivering remote customer projects.

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Our Flightpath implementation was top notch, our expectations set at the beginning of the project were met and we felt well supported throughout.

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FlightPath: your six-stage journey to success

We'll be sending you regular updates to keep you on track and ensure it is clear where you are on the journey - every step of the way.



6. Review

Check-in to see how you are progressing

5. Launch

Get the product into your colleagues' hands

4. Validation

Ensure all is working to your expectation

3. Learning

See what the product can do and train your colleagues

2. Preparation

Configure your systems in readiness

1. Getting started

Familiarise yourself with the process and product

You have control, but we are never far from your side.

Each FlightPath implementation programme from Access follows a well- defined journey with key milestones. These milestones represent – at a high level – the individual phases of your implementation journey. We'll be using these milestones to help us both track and communicate progress towards successfully launching to your users. Our aim is to give you value from your investment as quickly and as fully as possible. Using our years of software deployment expertise, we have defined the FlightPath methodology. This is a journey based on best practice and designed to deliver timely value to you and your colleagues. And while it is ultimately your journey, we are here to support you all along the way.

Clear roles and responsibilities

At the 'Getting Started' milestone phase, you will receive a Welcome Pack. In here you'll find clarity on roles and responsibilities. What you'll need to do, and what we will do. Crucially our FlightPath approach also clarifies our joint expectations, helping us both understand the process that we will jointly commit to, in order to successfully launch your chosen software to your end-users in a timely and efficient manner.

Your onward journey

Even when your implementation has successfully landed, and you are in a position to go live with our software, we will ensure that you are successfully transitioned to the care of our Success Team.

The Success Teams include our support colleagues and Customer Success Managers and will be available to support you as you use your software and realise the benefits of your investment in your Access Solution.

To ensure The Access Group can continue to support all our products, we have made sure 100% of our support teams can work securely and seamlessly from home. We have increased the capacity of our telephone system so support teams can be contacted wherever they are working using our usual support phone numbers.

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Sarah was an amazing coach and support throughout our Flightpath implementation - her help in getting this module off the ground was invaluable.



FlightPath for Association Financials

The tables below summarise what's included within the FlightPath package. We will help you choose the package that's right for you but please review this table to ensure your understanding.

FlightPath A
<p>Overview</p> <p>Roll out of 10 Access Financial databases within a single Workspace organisation. Based on a template database with pre-defined chart of accounts and template document layouts. Includes the roll out of a standard reporting pack (scoping of reports additional), roll out of standard analytics dashboards and e-learning material via Learning lite.</p>
<p>FlightPath Content</p> <p>Core Finance processes including:</p> <p>Nominal ledger processing, cashbook with auto bank rec, sales and purchase ledger invoices and payment, BACS exports, document storage for purchase invoices, and standard finance reporting</p> <p>Financial Apps Access Analytics standard dashboards</p>
<p>Included FlightPath Services</p> <p>Up to 3 hours on boarding support per association to assist with the loading of static SL and PL data, fixed asset records and opening balances. Access to e-learning content for Access Financials.</p>
<p>Additional Services available</p> <p>Custom Workspace Template provisioning Project kick off meeting Scoping and design of template system Custom template system build with review and changes Custom reporting pack / Dashboard build with review and changes HQ administrator training Custom UAT process Custom cut over planning Digital content creation and e-learning material Review sessions and training webinars Monthly PM time to support roll out</p> <p>Additional Training Services available</p> <p>End user training Administrator training</p> <p>Consultancy Services</p> <p>Bespoke configuration</p> <p>Reporting Services</p> <p>Bespoke Crystal Reports Additional Analytics Dashboards</p> <p>Development Services</p> <p>Bespoke workflow work Bespoke third party integration</p>

Greater detail can be found in the tables on the following pages.

Product features enabled per FlightPath package for Access Financials: Associations

Feature	Summary	FlightPath A
Core Finance Features		
Nominal Ledger	Advanced Nominal ledger with two entry segments (e.g. nominal code and cost centre) plus six further reporting categories	●
Sales Ledger	Standard sales ledger functionality including posting invoices, credit notes, receiving payments, producing statements and the ability to run aged debtor reports. Module also includes Access's standard document layouts (invoices, credit notes and statements) with the addition of your company details and logo.	●
Purchase Ledger	Standard purchase ledger functionality including posting invoices, credit notes, making payments via BACS, producing statements and the ability to run aged creditor reports. Module also includes Access's standard document layouts (remittances and supplier statements) with the addition of your company details and logo.	●
Cash book with bank reconciliation	The bank reconciliation module provides the ability to import a bank statement. The system will then attempt to automatically reconcile the transactions. When no match is found the user is able to manually add transactions and continue the reconciliation. A single bank statement format has been allowed for in your estimate.	●
Corrections	The corrections module allows users to correct transactions as well as amend or merge some records	●
Reporting Modules		
Standard system reports	Standard system reports (see solution description document for full list of reports)	●
Workspace Modules		
Workspace 'Collaborate'	Collaborate application in Workspace for sharing and storing documents	●
Document storage	Attaching documents to records and transactions including barcode scanning for PL invoices	●
Access Digital Tax	Electronic submission of VAT return to HMRC via Workspace App	●
Workspace Financial Apps	Find Customer, Customer Transactions, Find Supplier, Supplier Transactions	●
Access Analytics	Access Analytics with standard charts for all Workspace users with a 1Gb shared Data Engine database, 1 Data Engine editor and Access Only Data Sources	●
Learning Lite LMS	Access to software product training material and a small selection of general training material including: COVID-19 Response for Employees , Personal Development – Remote Working, Teamwork – Collaborative Working, Social & Corporate Resp. – Cyber Security, Social & Corporate Resp. – Fraud Awareness, GDPR, Personal Development - Time Management, Mental Health, Workstation Setup	●

Implementation Services included in FlightPath for Access Financials

		FlightPath A
System Provisioning	We provision your Access Financials databases based on an agreed template with template document layouts and the addition of association logos. Format consistent for all associations	●
e-learning and digital content	E-learning material via Learning Lite within Workspace.	●
Reporting pack and Dashboards	Roll out of a standard reporting pack (scoping of reports additional option), roll out of standard analytics dashboards (additional charts can be added as an option)	●
Static data load	Up to 1.5 hours on boarding support per association to assist with the loading of static SL and PL data, fixed asset records	●
Opening balance import	Up to 1.5 hours on boarding support per association to assist with the loading of opening balances	●

Additional Services available for Association Financials

On top of the services included within the standard FlightPath packages, the table below highlights the additional value added services that our consulting teams can provide. Please take some time to review these.

Additional software deployment services	
Custom Workspace Template provisioning	We will provision a custom template Workspace system with template Financials databases.
Project kick off meeting	Project kick off meeting to agree timeframes, roles and responsibilities, methods of working and measures of success.
Scoping and design of template inc write up, sign off and build team handover	We can undertake scoping exercises to drive out system requirements from multiple stake holders during workshops. These requirements can then be translated into system design and specification documents. The scoping can include reporting packs, dashboards and consolidation of Financial databases. Once the specification is signed off there is a handover process whereby the Build Team take on responsibility for the system build.
Custom template system build with review and changes	System build work including the import or chart of accounts, document design work and other system settings. After system is built presentation and review sessions are scheduled and time is allowed for other changes.
Custom reporting pack / Dashboard build with review and changes	Reporting and Dashboard build work. After system is built presentation and review sessions are scheduled and time is allowed for other changes.
HQ administrator training	A training course for your HQ administrators on how to administer Workspace and the multiple Access Financials databases. This assumes that your HQ Finance team are already proficient on the basic Finance functions of Access Financials.
Custom UAT process	We will design a custom UAT programme for you and provide UAT support whilst you test the template database(s) prior to roll out.
Custom cut over planning	We will design a custom cut over plan for you to support roll out to your associations
Digital content creation and e-learning material	We will collaborate with you to build custom digital content and e-learning material for your rollout so that your end user associations can adopt the new Financials package.
Review sessions and training webinars	During roll out and throughout the following year we will run a series of review sessions and training webinars to support the user adoption process.
Monthly PM time to support roll out	We will undertake additional project management services to ensure that your project runs smoothly. We will co-ordinate multiple Access resources and ensure that your dedicate project manager is available to help keep the project on track. Price per month
Training	
Remote Training	Additional remote training delivered using web conference technology. Price per ½ day
Administrator Training	Administrator training. Delivered remotely using web conference technology. Price per ½ day.
Consultancy	

Bespoke Configuration	We can undertake bespoke configuration outside of the Small Business Financials Flightpath
Reporting	
Bespoke Finance Reports	Where you require existing reports to be modified or new reports written as an addition to the suite of standard reports provided.
Bespoke Dashboards	We can create custom Dashboards in Access Analytics
Development Services	
Bespoke Third Party Integration	We can integrate Access Financials with other third party applications using web services APIs.
Bespoke workflow form	We can create bespoke 'Workflow Forms' which extend your database and give you the ability to capture and process additional data.



About The Access Group:

The Access Group has been recognised in The Sunday Times Tech Track 100 in 2019 and is a leading provider of business software to mid-sized UK organisations. It helps more than 32,000 customers across commercial and not-for-profit sectors become more productive and efficient. Its innovative Access Workspace cloud platform transforms the way business software is used, giving every employee the freedom to do more.

Established in 1991, The Access Group, with an enterprise valuation of over £1billion, employs more than 2,300 staff.

For more information about The Access Group, visit: www.theaccessgroup.com

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