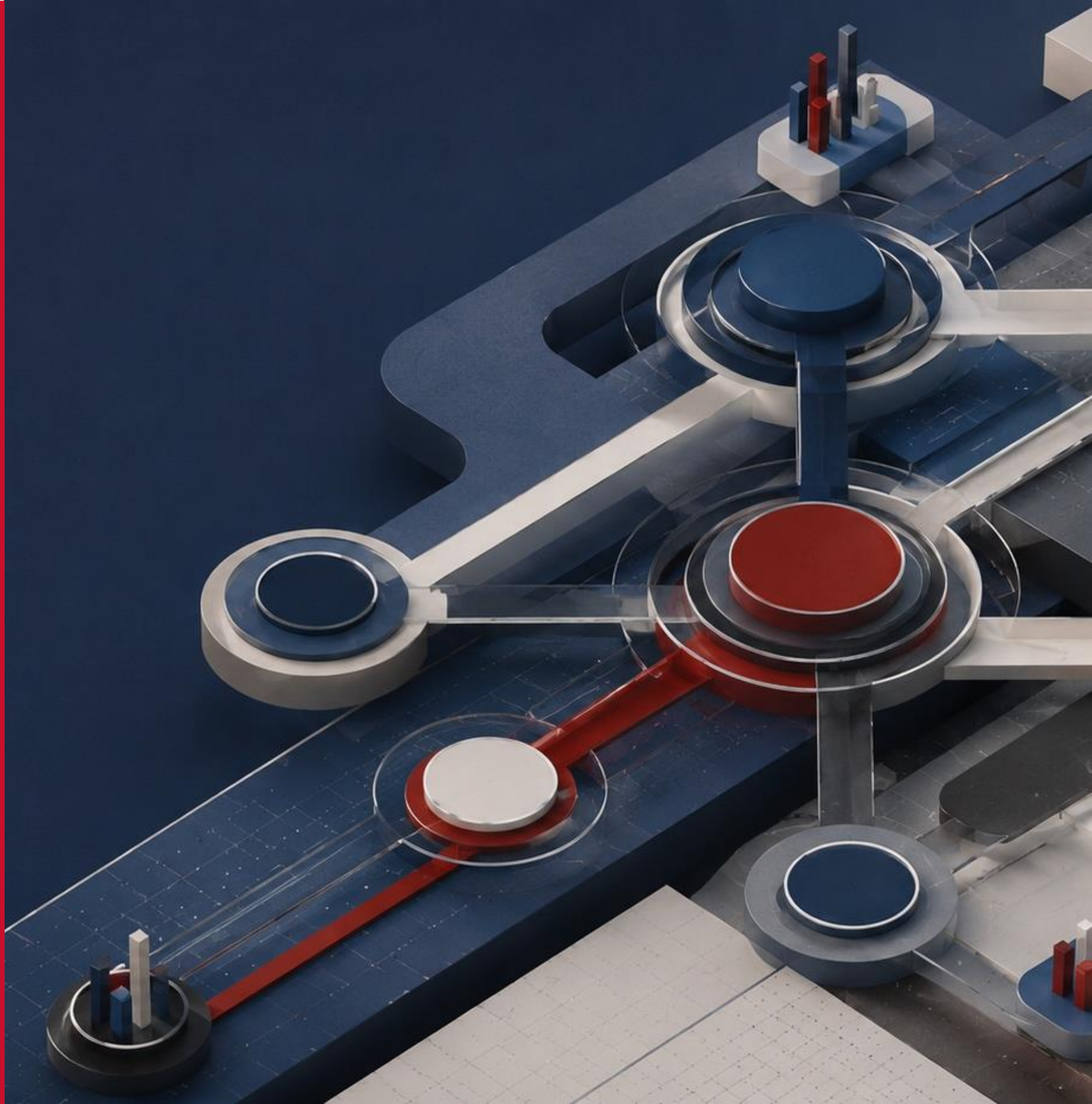
MUFK INTEGRATED

IMPLEMENTATION GUIDE

DISCOVERY TO CONTROLLED GO-LIVE

A practical guide for sponsors, process owners, administrators and delivery teams.

OWNERSHIP **EVIDENCE** **READINESS**



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PURPOSE AND USE

Start small enough to test completely

Successful implementation depends on clear ownership, disciplined scope, usable workflows, verified data and trained users.

Core principle

Configure the smallest complete process that can be tested with real users, real scenarios and controlled data before expanding scope.

Who should lead the work

- Executive sponsor and steering committee
- Business or process owner
- Project manager and implementation lead
- IT, security, privacy and records management
- Administrators, trainers and acceptance testers

Implementation discipline

- Approve scope and acceptance criteria before configuration.
- Assign decisions to named owners and record approvals.
- Collect and migrate only data needed for an agreed purpose.
- Test complete business scenarios, not isolated screens.
- Treat privacy, access and incident readiness as go-live gates.
- Use pilot and hypercare evidence to guide improvement.

GOVERNANCE

Clear roles turn decisions into controlled delivery

One person may hold more than one role, but each outcome, approval and risk still needs a named owner.

Executive sponsor

Owns the outcome and removes blockers.

APPROVES

Scope, funding, go-live

Business owner

Defines process, rules, users and success measures.

APPROVES

Workflow, forms, UAT

Project manager

Coordinates plan, risks, dependencies and communication.

APPROVES

Milestones, readiness

Technical lead

Coordinates environments, integrations and migration.

APPROVES

Technical design, cutover

Security / privacy

Reviews access, data handling and control evidence.

APPROVES

Security and privacy gates

MUFK delivery lead

Coordinates configuration, defects and handover.

APPROVES

Configuration baseline

Five phases move the solution toward operational control

Every phase produces evidence and ends with a decision, not simply a completed task list.

01

Mobilise & discover

Scope, current state, success measures

02

Design the solution

Workflow, access, data and acceptance

03

Configure & migrate

Build, integrate, reconcile and control

04

Test, train & prepare

Evidence, readiness and approval

05

Launch & improve

Cutover, hypercare and handover

Decision discipline

Maintain one approved scope baseline, record risks and decisions with owners and dates, and hold design and readiness reviewswith decision-makers present.

Define the outcome before designing the system

Discovery establishes the implementation boundary, decision structure and evidence required to proceed.

01

Mobilise governance

Confirm sponsor, business owner, project manager, workstream leads and the communication rhythm.

02

Map the operating context

Identify processes, exceptions, teams, locations, users, information sources and record categories.

03

Define success and constraints

Agree measurable outcomes and identify regulatory, contractual, privacy, security and retention requirements.

Discovery outputs

- Approved scope and assumptions
- Current-state map and pain points
- Stakeholder, user and data inventory
- Measures, acceptance and initial logs

Exit gate

Sponsor and business owner approve discovery outputs and authorise solution design.

Translate operating needs into testable design

The design must connect process behaviour, access responsibility and data handling to clear acceptance criteria.

Process & workflow

- Intake, required information and validation
- Priorities, statuses and closure conditions
- Assignments, approvals, escalations and exceptions
- Reports and operational review routines

Roles & access

- Each role's operational purpose
- Create, view, update, approve and export rights
- Privileged administration separation
- Access request, review and removal procedures

Data, privacy & retention

- Purpose for every collected field
- Sensitive record classification and restrictions
- Retention, deletion and legal-hold rules
- Operators, integrations and transfer locations

Design gate

Business owner, technical lead and security/privacy reviewers approve the configuration specification and testable acceptance criteria.

Build with control and reconcile before production

Configuration, integration and migration evidence must remain traceable to the approved design.

Configure

Implement approved roles, forms, fields, workflows, categories and reports. Demonstrate completed workflow slices and maintain a configuration register.

Integrate

Document source, destination, exchanged data, triggers, authentication, monitoring, failure handling, support ownership and recovery.

Migrate

Profile and clean source data, approve mappings, complete a test migration and reconcile counts, totals and representative records.

Required control evidence

- Approved configuration changes and demonstration outcomes
- Integration design, monitoring and recovery procedure
- Business-approved migration reconciliation

Migration rule

No production migration proceeds without an approved mapping, successful reconciliation and a documented rollback or recovery approach.

Go-live approval depends on evidence, not optimism

Test complete scenarios, train by role and close every readiness dependency before cutover.

Configuration

Forms, rules, workflows and reports

EVIDENCE

Results and defects

End-to-end

Complete scenarios, exceptions and closure

EVIDENCE

Scenario outcomes

Integration

Exchange, failure handling and recovery

EVIDENCE

Logs and reconciliation

Migration

Completeness, accuracy and record usability

EVIDENCE

Signed reconciliation

Security / privacy

Access and data-handling requirements

EVIDENCE

Approved review record

User acceptance

Trained users complete agreed work

EVIDENCE

Signed UAT outcome

Readiness gate

Scope, defects, reviews, users, training, support, cutover, rollback, retention and sponsor approval are all confirmed.

Launch is a controlled transition into operations

Cutover verifies immediate control, hypercare stabilises usage, and handover creates durable ownership.

01

Controlled cutover

Freeze unauthorised changes, execute the approved sequence, verify key journeys and reconciliation, communicate launch and record deviations.

02

Hypercare

Review adoption, defects, support demand, bottlenecks, data quality and operational risks at an agreed cadence with assigned owners.

03

Transition to operations

Confirm ownership, hand over documentation, transfer remaining risks, review outcomes and approve an improvement backlog.

Operational outcome

A supported production service with named owners, current documentation, transferred risks and an evidence-led improvement backlog.

Production approval requires current technical evidence

Confirm the controls relevant to the agreed solution before publishing claims, contracting or approving go-live.

Control areas to verify

- Hosting, production, backup and recovery regions
- Transport and storage encryption, including key responsibility
- Authentication, multi-factor and role-based access settings
- Audit events, log access, retention, monitoring and alerting
- Backup frequency, protection, restoration and recovery objectives
- Patch, vulnerability, testing and remediation arrangements
- Incident response, notification and disclosure procedures
- Retention, secure deletion, operator and subprocessor arrangements

Publication control

Do not publish or contract on unverified technical claims. Use the approved Security and Data Handling Overview and supporting evidence register.

APPROVAL GATE

Responsible reviewers confirm relevant controls against current evidence before production use.

IMPLEMENTATION RECORDS

The evidence pack becomes the operational memory

Keep the records that explain what was approved, how the solution was tested and who owns it after launch.

Scope & governance

- Approved scope, assumptions and acceptance criteria
- Stakeholder map, governance structure and responsibility matrix

Design & data

- Process maps, configuration specification and access matrix
- Data inventory, field map, retention schedule and migration reconciliation

Assurance & decisions

- Integration designs, test evidence and support procedures
- Decision, risk, issue, defect and change logs

Adoption & handover

- Training materials, attendance and UAT evidence
- Cutover plan, go-live approval, hypercare log and handover pack

Practical rule If a decision, control or acceptance result matters after go-live, preserve the evidence and assign its owner.

NEXT STEP

Begin with a scoped discovery workshop

Bring the decision-makers

- Executive sponsor
- Business owner
- Project manager
- Technical lead
- Security / privacy representatives

Workshop outcome

- **Shared implementation boundary**
  The process, teams, users, information and modules in scope.
- **Named ownership and gates**
  Decision-makers, reviewers, evidence requirements and approval points.
- **A practical delivery proposal**
  Phases, responsibilities, assumptions, dependencies and next actions.

Talk to MUFK Integrated

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