



PROJECT **PERFECT**
Pty Ltd

Implementation Checklist

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Version 1.0

1 Feb 09

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Document Origin

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Change History

Version	Date	Changes
1.0	1 Feb 09	Initial Version

Overview

**General
comments**

There can be no set of questions to ask in all situations. The following topics are typical issues for implementation.

Approach

Go through the list and identify what is applicable to your implementation. Through a workshop, identify other activities that may be specific to this solution implementation. Also discuss with the vendor, or invite the vendor to the workshop.

Physical Installation

Overview The environment needs to be set up for the solution:

- Planning**
- What is required
 - Who authorises
 - What is the procedure
 - Delivery lead times
 - Schedule for implementation
 - Contracts
-

- Hardware**
- New hardware
 - Location for equipment
 - Cabling
 - Power/UPS
 - Backup
 - Testing hardware
-

- Software**
- Installation of operating system
 - Installation of the solution
 - Set up database
 - Database security
-

- The people**
- Training technicians
 - Setting up system procedures
-

- Environments**
- Production environment
 - Testing environment
 - Training environment
 - Development environment
 - Version Control
-

- Security**
- Create profiles
 - Set up profiles
 - Test profiles
-

Testing

Overview Arranging testing and carrying out rectification

- Planning**
- Test Strategy
 - What sort of testing to take place
 - Location for testing
 - Who will do testing
 - Acceptability criteria
 - Test scenarios
 - Test plans
-

- Types of testing**
- Integration testing
 - Load testing
 - User Acceptance Testing
 - Print testing
 - Regression testing
-

- Logistics**
- Location of testing
 - Equipment
 - Staff
 - Testing software
 - Managing suspected bugs
 - Sign off procedures
-

- Acceptance Criteria**
- What criteria
 - Timing of delivery (e.g. if we do not reach this point by Sunday 12 pm we revert to old system)
 - Validation of criteria
 - Who signs off
-

Training

Overview Setting up the training for the new users

- Planning**
- Training strategy
 - Skills Assessment
 - Training plan and schedule
 - Book venues
 - Book equipment
 - Book people
 - Book catering
 - Book travel and accommodation
 - Produce training materials
-

- Delivery**
- Train the trainer
 - Deliver and install equipment (projectors, PCs)
 - Set up network
 - Deliver sessions
 - Receive feedback
-

- Close down**
- Return rental equipment
 - Clean venues
-

Data

Overview Focus on data conversion

- Planning**
- Identify all data to be transferred
 - Identify data quality issues that must be fixed at conversion
 - Identify data modifications at conversion
 - Create a schedule for conversion
-

- Preparation**
- Close off old system entry
 - Reconcile data
 - Run data checks
 - Run correction scripts
-

- Transfer**
- Identify validation processes
 - Run conversions
 - Validate data
-

Resources

Overview Managing the people directly involved in the implementation effort

- Planning**
- Identify resource availability and non availability
 - Draw up resource plan
 - Gain agreement to plan
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Overview The people who will be involved in the conversion

- Who**
- Identify roles
 - Identify when required
 - Arrange availability
 - Brief staff
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- Engage**
- Book any travel and accommodation
 - Arrange local travel e.g. car, taxi voucher
 - Arrange facilities
-

Support

Planning

- Develop support strategy
 - Develop support plan
-

Implementation support

- Set up help desk
 - Train help desk staff
 - Produce help desk support documentation
 - Identify vendor support required
 - Gain vendor agreement to provide support
-

Problem handling

- Procedure for handling problems on implementation
 - Resource staff to address problems
 - Create feedback on problem resolution
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Contingency

- Create a contingency plan
 - Test plan
 - Brief people on the plan
 - Identify triggers (e.g. if the system is down for 2 hours we implement the plan)
 - Identify catch up process
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