XBCIS7329

System Implementation Plan

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| --- | --- |
| **Team Number:** | Insert team number here |
| **Team Name:** | Insert team name here |

# Project Team

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| --- | --- | --- | --- |
| **Team Members** | **Role in Team** | **IIEMSA e-mail** | **Personal e-mail** |
| Insert member name here | Insert member role here | Insert IIEMSA e-mail | Insert personal e-mail |
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# Project Client

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| --- | --- |
| **Client Organisation Name:** | Insert organisation name here |
| **Client Contact Person:** | Insert name of the contact person here |
| **Client Contact Details:** | Insert phone and email contact details for the contact person here |

***NOTE:***

* ***All the red text included in this document template must be deleted and replaced with your own content.***
* ***Some of the work you were tasked to do in Semester 1 for SAD was intended to help you prepare for this document. Use that content, but make sure that you update, review, and insert only the appropriate parts in this document******.***

**Background:**

When you are ready to deliver your final system towards the end of Semester 2, it is important that all aspects of the implementation have been considered and completed, so the system can be handed over to the client and go live. Some implementation tasks require many months to complete so must be planned for well in advance of actual delivery, so that you do not have delays because of things such as:

* Client does not have hardware / software to use the system;
* No host server for the system, or host server not suitable for the system;
* System available but data required to run the system not uploaded, and is going to take months to upload;
* Client does not know how to use the system, and finds the User Documentation very difficult to use;
* There is no-one to fix any problems or enhance the system when the IE team is no longer there;
* The System does not meet the client’s requirements, and they want many changes.

# Executive Summary

This section always precedes the table of contents, so that someone could read only this first page if they wanted to get a quick understanding of the project and the system.

The Executive Summary should provide a summary of the key points of the document:

* This may include a brief description of the implementation approach, the major tasks which are needed for a successful implementation, major challenges which need to be resolved, and the timeframe for implementation and handover of the final system.

This section should not exceed one page

**Table of Contents**

[Project Team i](#_Toc478565002)

[Project Client i](#_Toc478565003)

[Executive Summary ii](#_Toc478565004)

[1. Introduction 1](#_Toc478565005)

[2. Implementation Plan 1](#_Toc478565006)

[2.1. Implementation Approach 1](#_Toc478565007)

[2.2. Key Contacts for Implementation 1](#_Toc478565008)

[2.3. Client Site/Environment 1](#_Toc478565009)

[2.3.1. Hardware 2](#_Toc478565010)

[2.3.2. Software 2](#_Toc478565011)

[2.3.3. Hosting 2](#_Toc478565012)

[2.3.4. Facilities 2](#_Toc478565013)

[2.4. Installation 3](#_Toc478565014)

[2.5. Data Conversion 3](#_Toc478565015)

[2.6. User Training 4](#_Toc478565016)

[2.7. Documentation 5](#_Toc478565017)

[2.7.1. Training 5](#_Toc478565018)

[2.7.2. User Documentation 5](#_Toc478565019)

[2.7.3. System Documentation 5](#_Toc478565020)

[2.8. Handover to Maintenance 5](#_Toc478565021)

[2.9. Testing 6](#_Toc478565022)

[2.9.1. Overall Testing Strategy 6](#_Toc478565023)

[2.9.2. Acceptance Testing 6](#_Toc478565024)

[2.9.3. Backup and Recovery Testing 6](#_Toc478565025)

[2.10. Post-Implementation Review 7](#_Toc478565026)

[3. Implementation Schedule 7](#_Toc478565027)

[4. Implementation Impact 7](#_Toc478565028)

[5. Implementation Plan Signoff 8](#_Toc478565029)

[6. Appendices/Attachments 9](#_Toc478565030)

*Note: Make sure you update the table of contents before finalising the document.*

# Introduction

The introduction indicates the purpose of the document. It must include a short description of the project and describe the current stage it is at.

This section should clearly state the nature, purpose, audience and scope, limitations and constraints of the plan, and describe the methodology used to gather the information in the plan. It should identify any known factors that may limit the accuracy or completeness of the plan, and provide a list of terms, acronyms and abbreviations used in the plan.

This section should not exceed one page.

# Implementation Plan

In the following subsections you should include the details related to your system implementation and handover. This should include but not be limited to:

* An overall description of the implementation approach.
* Key contacts for the implementation
* Summary of each major task to be performed specifically for your project during the implementation. **DO NOT provide a generic description of each task – we want to know exactly what is required** to implement your system. Details should include:
  + Task description
  + Resources (including human resources) required to complete the task, highlighting any external (client, vendor involvement)
  + Criteria for successful completion
* Implementation schedule – a schedule of the implementation tasks, chronological order with beginning and end dates, milestones, dependencies.

## Implementation Approach

An overall description of the implementation approach.

## Key Contacts for Implementation

This should include key contact people at your client, together with their contact details. It could also include external contacts, such as vendors, service providers, etc.

## Client Site/Environment

In the following subsections provide details of any hardware (e.g. computers, servers, peripheral equipment, networks, etc.), software (e.g. applications, databases, operating systems, utilities, etc.), hosting requirements, physical facilities (e.g. offices, server rooms, ISP, etc.) required for implementation.

### Hardware

Details of any hardware (e.g. computers, servers, peripheral equipment, networks, etc.)

* What does the client have currently?
* Is it suitable for the system in both the short and the long term?
* If it is not suitable:
  + What do they require? When must the purchase be finalised by? How often are you going to remind them? What will you do if the site is not prepared on time?
  + What are you going to do to facilitate the purchase?
    - Specify criteria to consider, requirements
    - Do the research, make recommendations
* What are backup options?

### Software

Software (e.g. applications, databases, operating systems, utilities, etc.)

* Does the client have the required software?
* If not?
  + What do they require? When must the purchase be finalised or when must the software be acquired by? How often are you going to remind them? What will you do if the software is not available by the required date?
  + What are you going to do to facilitate the purchase or acquisition of software?
* How are version changes going to be managed?

### Hosting

Details of any requirements for online systems

* What does the client have currently?
* Is it suitable for the system in both the short and the long term?
* If it is not suitable:
  + What do they require? When must the purchase be finalised by? How often are you going to remind them? What will you do if the site is not prepared on time?
  + What are you going to do to facilitate the purchase?

### Facilities

Does your system introduce any new requirements related to physical facilities (e.g. offices, server rooms, ISP, etc.)

* What special physical facilities (if any) are required?
  + Eg. Does the server room need to be air conditioned?

## Installation

This task will describe how the system will be deployed into production.

What installation method are you going to install the final system?

* Direct cut over, Parallel, Phased (you will need mentor approval for Phased installation as that means that you are installing different versions of the system as you go through your builds) – you may be using a combination of these methods
* What are the advantages and disadvantages of each of these methods?
* What is the method that best suits your client’s project and requirements? How are you going to manage the disadvantages associated with the method?

## Data Conversion

This task will describe the process for the creation, conversion and/or import of data required for the system.

What data must be uploaded/entered into the database of the system before it can go live?

* You will need to review each table in your database to ascertain
  + No. of records – this may be 0 if the client is a new business or does not want any of their previous data in the system, or in the 1000s if the client wants all their data moved across. Some of this data is administration type data eg. products, categories, etc. which are essential to use the system. This will vary substantially for each project.
  + No. of fields per record
  + Current form of data – paper based, database in another system, excel spreadsheet, etc.
* Method of data conversion
  + Enter all the data using your system
    - How long is this going to take? Is it practical? Are there alternate methods that are quicker?
  + Create a data entry system just for data conversion, where the focus is on speed rather than usability and aesthetics
    - How long will it take to develop this system? How long will it take to enter the data? How much time will it save compared to other methods?
  + Upload the data into your database using a .csv file
    - How long will it take to put the data into this format? How will you ensure that the data is valid?
  + Transfer the data from another database
    - What method will you use for the transfer? Will the data need to be reviewed, revised to suit your database? How long will it take?
* When do you need to start the Data Conversion process?
* Once you start the Data Conversion process, how are you going to keep all data up-todate?
  + EXAMPLE:
    - 1/8/13 – 30/8/13: Enter all product data into the database
    - 4/8/13: Client changes price for Product 1 in their paper based system. Product 1 was entered into the database on 1/8/13. It is now incorrect in your new system.
    - 4/9/13: Client deletes Product 99 from their paper based system as it is no longer available. Product 99 was entered into the database on 18/8/13. It is still available in your new system.
  + As soon as you start Data Conversion you must have a process to ensure that all updates are applied to the data that has already been converted.
* Who is going to do the Data Entry?
  + Client or are they going to hire someone? Students do NOT do data entry, unless it is just a few records.
* Is the data secure? This is especially important for sensitive data, and you may not have all your processes for data security in place yet.
* Is the data backed up? You must ensure that all data converted is backed up regularly.

## User Training

This task will describe the training schedule and training plan/processes for current staff, and on-going training for future staff

What sort of training will your client and their employees require? You need to assess the type of client you have, in conjunction with the complexity of your system. Keep in mind that you will need to train them not only on how to use all aspects of the system, but also how to backup and recover the system.

* How long will it take? Will it be hours / days? Will it be over a number of days? Will it be in phases eg. Phase 1 General Training, then leave it with them for a while, followed by Phase 2 Problem Solving Training.
* Where will it be held?
* Does the client need to put the dates in their business calendar?
* Do they need to plan for it from a business perspective? Eg. If they have 5 employees and all the employees are going to be trained at the same time, how will the business function during that time period?
* Do you need to prepare specific training documentation? What is the timeline for preparing this documentation? What form is this documentation going to take?

## Documentation

Details of the documentation to be provided for training, on-going use of the system – users and operational, maintenance of the system.

### Training

Do you need to prepare specific training documentation? (See User Training section above)

### User Documentation

* What form is the documentation going to take?
* What are you going to include in the User Documentation?
* When are you going to start preparing the template for the documentation?
* When are you going to put all the User Documentation together?
* When/how are you going to do the Usability testing for your User Documentation?

### System Documentation

* What form is the documentation going to take?
* What are you going to include in the System Documentation? Is it going to be a thorough description of the system suitable for the person/team maintaining your system?
* When are you going to start preparing the template for the documentation?
* When are you going to put all the System Documentation together?
* When/how are you going to do the Usability testing for your System Documentation?

## Handover to Maintenance

This task details the handover process to staff responsible for the on-going maintenance of the system.

* Who will be maintaining the system once it has been handed over? The staff responsible for maintenance of the system MUST be available before the system goes live.
* What does the client need to look for in a maintenance organisation? What are their criteria – relevant software skills, cost, availability, turnaround time, reliability, etc.
* What process are you going to follow to ensure that this happens? The client MUST be informed of the high risk to the business if this is not organise.
  + How often are you going to remind the client that this must be organised?

## Testing

For this plan please put in:

* a summary of your overall testing strategy
* Acceptance Testing: This task details how and when acceptance testing will be conducted;
* Backup and Recovery Testing: Details of how and when this will be conducted.

### Overall Testing Strategy

What is your Overall Testing Strategy?

* Unit Testing – for each functions,
* Integration Testing – Integrate each function, Integrate each Build to all previous Builds.
* System Testing – Test the final working system. Must be scheduled before Acceptance Testing.

### Acceptance Testing

With Agile development, User Acceptance Testing should happen at the end of each Build, so hopefully there will be no surprises at the end when the client conducts Acceptance Testing for the whole system.

* When will all the Acceptance Criteria happen?
* When will Acceptance Testing for the final system happen?
* When will the client be informed so that they can plan for it in their schedules and not delay the project?
* Have you left enough time to cater for any last minute changes after Acceptance Testing?

### Backup and Recovery Testing

Details of how and when this will be conducted.

* When will the instructions be written on how to conduct this?
* When will the test be conducted?
* What needs to be available for the test to be conducted?

## Post-Implementation Review

This task provides details of the review of the system to be conducted after the system has been operational for a short time.

* When is this going to happen?
* What will happen if the system does not go live?
* When will the client be informed so that they can plan for it in their schedules?

# Implementation Schedule

Provide a schedule of the implementation tasks, chronological order with beginning and end dates, milestones, dependencies.

After you have reviewed all the Implementation Tasks (see above section), you will be in a position to create a schedule with the key tasks and sub-tasks, reminders, and the key dates. This should be a key planning document for your team. As always, the plan will need to be updated depending on project progress and client availability.

# Implementation Impact

This section should include (if appropriate) but not be limited to:

* Details on any ongoing operational tasks the organisation will be required to perform after the implementation.
* Details on any ongoing system maintenance tasks the organisation will be required to perform after the implementation.
* Details of any changes to existing business processes or new business process that will be required by the implementation.
* Details of other systems that may be impacted temporarily during or permanently after the implementation.

# Implementation Plan Signoff

BEFORE YOU PRESENT THE FINAL VERSION OF THIS DOCUMENT TO YOUR CLIENT FOR SIGN-OFF:

* YOU MUST SEE THE LECTURER TO REVIEW YOUR DOCUMENT FOR COMPLETENESS AND CLARITY.
* ONCE SIGNED OFF BY THE CLIENT SUBMIT A PRINTED COPY OF THE DOCUMENT FOR SIGN-OFF BY THE LECTURER.

It is agreed by The Client, **insert Client Organisation Name** and **IIEMSA** that this Implementation Plan is an accurate description of the implementation tasks that must be carried out for The Project that will be developed for The Client by the following IIEMSA students:

|  |  |
| --- | --- |
| **Project Team Members** | **IIEMSA Student ID** |
| Insert member name here | Insert member role here |
|  |  |
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The Client verifies that:

* this document has been read and reviewed, and explained to The Client by The Project Team listed above;
* this document shows that the students in The Project Team have a clear understanding of the tasks and implementation steps needed to implement The Project;
* it is understood that once the system has been developed and implemented The Project Team and IIEMSA will provide no further support and carry no liability for the system.

Dated this ddth day of mmmm 20yy

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| --- | --- |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signed by insert Client Contact for and on behalf of insert Client Organisation Name | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signed by Project Team Leader: insert name of Team Leader |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signed for and on behalf of IIEMSA by the team’s supervisor, Yolanda Kanyama |  |

# Appendices/Attachments

Materials that support the Plan are included here.

This might include specifications for existing/new hardware, software; service provider information, etc.