

**过渡策略模板**

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<The text in <> is Guidelines for filling section. Please delete the Guideline after filling the details in the section.>

文档概述Document Overview

文档目标Purpose

*<过渡计划的目标是对需要开展的任务和活动进行安排，为了有效地推动一个产品支持或者客户服务。>*

*<The purpose of transition planning is to layout the tasks and activities needed to carry out, to efficiently move a product support/customer service.>*

适用范围Scope

*<本章节应定义文档的适用范围。>*

*<This section shall contain the scope of the document.>*

目标读者Intended Audience

*<本章节应该定义本文档的目标读者清单。>*

*<This section shall contain the list of intended users of this document.>*

缩写和定义Acronyms and Definitions

*<本部分应列举文档中所使用的所有缩写和定义。>*

*<This section shall list all the acronyms and definitions used in the document.>*

|  |  |
| --- | --- |
| 缩写和术语Acronym/Term | 定义  Definition |
|  |  |
|  |  |

参考文献References

*<本章节应罗列所有支持过渡计划的制定的参考文献的清单。包括所有与产品支持或者客户服务相关的文档，关于安全或者隐私问题的保护文档，以及关于产品的任何软件或者硬件许可信息。*

*<This section shall provide a list of all references used in support of the development of the Transition Plan. Include a list of all the documentation related to the product support/customer service that is to be transitioned to the operations area, Include any security or privacy protection consideration associated with its use. Include any software/hardware licensing information for the product.*

1. *工作说明书Statement of Work*
2. *服务等级协议Service Level Agreement*
3. *产品信息Product information*

产品支持或者客服概述Product Support/Customer Service Overview

产品支持或者客服Product Support/Customer Service

*<本章节应该定义适用于本文档的产品支持或者客服目的的简单说明。同时还应描述产品支持或者客户服务的总体特性；识别项目的发起人、收购商、用户、开发商、经销商和维护组织；识别当前和计划的运行服务器以及列出其他相关文档等。同时提及产品支持或者客服的适应范围。>*

*<This section shall include a brief statement of the purpose of the product support/customer service to which this document applies. It shall also describe the general nature of the product support/customer service; summarize the history of development, operation, and maintenance; identify the project sponsor, acquirer, user, developer, vendor, and maintenance organizations; identify current and planned operating sites; and list other relevant documents.*

*Also mention scope of product support / customer service>*

关系Relationships

*<本章节应该描述和其他任何产品、项目和代理商之间的产品支持或者客服关系，可以使用图表和流程图来说明。>*

*<This section shall describe the relationship(s) of the product support/customer service being transitioned to any other products, projects and agencies. Include a diagram, flow chart to indicate these relationships.>*

策略Strategies

识别和选择策略Identify and Select Strategy

*<本部分应说明过渡计划中的过渡策略和工具。识别将产品支持或者客服从当前状态转移到SunGard中国的所有可能选择方式。可以是阶段性的、并行执行（现场-海外）等等。*

*<This section shall identify the transition strategies and tools to be used as part of the Transition Plan. Identify all the options for moving the product support/customer service from its present state to SunGard China. The options may include Phased Approach, Parallel execution (Onsite-Offshore) etc*

*每个选择方式应说明*

*Each option shall also identify the*

* *优缺点Advantages and disadvantages,*
* *风险Risks,*
* *估计的时间范围Estimated time frames, and*
* *估计使用资源Estimated resources.*

*同时本章节还应该包括对每个过渡选项的评估、和过渡的需求进行比较，以选择一个最适合本项目的选项。过渡策略一旦选定，应记录并被批准。>*

*This section shall also include an evaluation of each of the transition options, comparing them to the transition requirements, and selecting the one that is most appropriate for the project. Once a transition strategy is selected, justification shall be documented and approved.>*

过渡进度计划、任务和活动Transition Schedule, Tasks and Activities

进度计划Schedule

*<本章节应该定义所选的过渡策略的详细进度计划或者提供该进度计划的参考。本进度计划应该包括设备安装、培训、转换、部署或现有系统的退役（如果适用的话），以及把产品从开发商或者经销商移交到运行人员所需的过渡活动。进度计划应该体现开展过渡活动的所有里程碑。>*

*<This section shall include, or provide reference to, detailed schedule for the selected transition strategy. This schedule shall include equipment installation, training, conversion, deployment,* *and/or retirement of the existing system (if applicable) as well as any transition activities required to turn over the product from developers or vendors to operational staff. The schedule shall reflect all milestones for conducting the transition activities.>*

安装Installation

*<本章节应该描述SGC所需的安装、对当前安装的所有必要修改、目标环境的检查和客户验收流程。如果出现问题，应该识别并报告这些问题；解决问题的流程需要在此识别并定义。此外，还应该描述临时性的“应急措施”(若有的话)。*

*<This section shall describe installation required at SunGard China, any required modifications to the current installations, checkout in the target environment(s), and customer acceptance procedures. If problems arise, these shall be identified and reported; procedures shall be addressed here as well. Temporary “work-around(s)”, if any shall also be described.>*

运行和支持Operations and Support

*<本章节应该识别并定义用户运行和所需的在线支持活动。支持包括提供技术支持、咨询和通过维护支持请求日志来记录用户支持请求。对现有项目的监控活动或者问题和变更日志可以触发维护活动，应该描述这个过程，或者提供相关文档的参考。>*

*<This section shall address user operations and all required ongoing support activity. Support includes providing technical assistance, consulting with the user, and recording user support requests by maintaining a log of support requests. The Operations and Support activities may trigger maintenance activities via the ongoing project monitoring and controlling activities or problem and change logs and this process shall be described, or a reference to associated documentation shall be provided.>*

移交Conversion

*<本部分应识别并定义在移交产品过程中涉及的数据或者数据库和组件。>*

*<This section shall address any data or database transfers to the product and its underlying components, which shall occur during the transition.>*

维护Maintenance

*<维护活动主要是指识别改进点和解决产品问题、失误和故障。通过使用已经定义的问题和变更管理报告流程，软件维护的需求触发“服务等级变更”或者“产品修改请求”。本章节应该描述所有在过渡期间与产品维护相关的问题和活动。>*

*<Maintenance activities are concerned with the identification of enhancements and the resolution of product errors, faults and failures. The requirements for software maintenance initiate “service level changes” or “product modification requests” by using defined problem and change management reporting procedures. This section shall describe all issues and activities associated with product maintenance during the transition.>*

资源需求Resource Requirements

*<本章应对所有资源（硬件、软件和设施）、特定的资源（服务和维护合同）和人员安排等进行估算。应明确每个被任命的人员、代理商和经销商的职责安排。让经理和项目团队成员按照此计划和其他任务进行协调。如果在制定过渡计划时无法识别特定人员，可以使用一般称呼，一旦识别了资源就更新。>*

*<All estimates for resources (hardware, software, and facility) as well as any special resources (service and maintenance contracts), and staffing for the selected transition strategy shall be described in this section. The assignment of staff, agency, and vendor responsibility for each task identified shall be documented. This allows managers and project team members to plan and coordinate the work of this project with other assignments. If specific individuals cannot be identified when the transition plan is developed, generic names may be used and replaced with individual names as soon as the resources are identified.>*

软件Software

*<本章应该描述维护已交付产品所需的软件和相关文档。应该明确名称、识别码、版本号、发布号、配置、用户手册或者指南等。确认每个产品项目的信息，是本公司所拥有的还是需要另外购买。还包括供应商信息、许可证、使用和所有权、目前该项目是否获得供应商支持、在交付时是否获得支持、公司是否已获得许可证以及许可证的有效时间等。同时还应包括所需的服务和维护合同费用以及支付职责。>*

*<A description of any software and associated documentation needed to maintain the deliverable product shall be included in this section. The description shall include specific names, identification numbers, version numbers, release numbers and configurations as applicable. References to user/operator manuals or instructions for each item shall be included. Identify for each product item, whether it is currently owned by the organization, or to be purchased. Include information about vendor support, licensing, and usage and ownership rights, whether the item is currently supported by the vendor, whether it is expected to be supported at the time of delivery, whether licenses shall be assigned to the maintenance organization, and the terms of such licenses. Include any required service and maintenance contract costs as well as payment responsibility.>*

硬件Hardware

*<本章节应该维护已交付产品所需的所有硬件和相关文档的描述。硬件可以包括计算机、外围设备、模拟器、仿真器、诊断设备以及非计算机设备。说明过内容应包括特定的模板、版本以及配置、用户手册或者使用说明。识别每一个硬件，是否需要给维护组织提供硬件、当前维护组织是否拥有或者需要采购硬件。（如果需要采购硬件，包括当前供应商的信息、订货信息以及预算情况。）包括制造商支持信息、许可证、使用权和占有权、许可证是否应该分配到维护组织，以及许可证的有效日期等。）*

*<This section shall include a description of all hardware and associated documentation needed to maintain the deliverable product. This hardware may include computers, peripheral equipment, simulators, emulators, diagnostic equipment, and non-computer equipment. The description shall include specific models, versions, and configurations. References to user/ operator manuals or instructions for each item shall be included. Identify for each hardware item, whether it shall be provided to the maintenance organization, or the maintenance organization currently owns or needs to acquire. (If the item is to be acquired, include information about a current source of supply, and order information as well as what budget is to pay for it.) Include information about manufacturer support, licensing, usage and ownership rights, whether the items are currently supported by the manufacturer, or shall be in the future, and whether licenses shall be assigned to the maintenance organization and the terms of such licenses.>*

设施Facilities

*<本章节应该描述维护已交付产品所需的设施。设施可以包括特定的建筑、房间、模型以及建筑特征等。如需要高层，可以支持安全和隐私保护的建筑特征、特定的供电需求等等。包括可能适用的图表。>*

*<This section shall describe any facilities needed to maintain the deliverable product in this section. These facilities may include special buildings, rooms, and mock-ups, building features such as raised flooring or, building features to support security and privacy protection requirements, safety requirements, special power requirements, and so on. Include any diagrams that may be applicable.>*

人力资源Human Resources

*<本章节应描述维护已交付产品所需的所有人员，如计划人员数量、支持人员的类型（工作描述）、技术等级和专业技术需求以及安全检查等。〉*

*<This section shall include a description of all personnel needed to maintain the deliverable product, include anticipated number of personnel, types of support personnel (job descriptions), skill levels and expertise requirements, and security clearance.>*

沟通Communication

*<定义客户联系人和步骤。定义客户组织结构、SunGard中国以及其他有关组织、报告类型和频率等。>*

*<Define customer interaction points and processes. This may include defining the structure of a customer organization, SunGard China and any other parties. Types of Reports and its frequency shall be defined>*

过渡团队Transition Team

*<本部分应包括过渡团队的组织架构、每个活动的角色和职责、以及所需的工具、技术、方法或流程。>*

*<This section shall include the transition team’s organization, roles and responsibilities for each activity, as well as the tools, techniques, and methodologies and/or procedures that are needed to perform the transition.>*

过渡状态监督Transition Status Monitoring

*<本部分应定义过渡阶段的监督和状态报告流程。内容包括评估方式（状态评审会议、审计或测试）以及状态报告的格式。>*

*<This section shall define the monitoring and status reporting procedures for the transition period. Include such things as type of evaluations (status review meetings, audit, or test) and status report format.>*

假设和约束Constraints and Assumptions

*< 本章节应该说明过渡活动的假设和约束。>*

*<This section shall state the constraints and assumptions for the transition activity.>*

风险管理Risk Management

*<本部分应定义过渡过程面临的所有已知风险。可直接参考风险管理计划，说明缓解风险措施、风险跟踪以及风险报告等信息>*

*<This section shall identify all known risks faced by the transition process. Reference to risk management plan shall be provided here. A description of risk mitigation, tracking, and reporting shall be presented.>*

验收标准Acceptance Criteria

*<确认产品交付的标准或者验收标准时十分重要的。这些标准决定了交付工作产品的接受程度。交付组织和接收组织的代表应正式签字确认，如服务等级协议等。在协议中应该说明产品验收所需的技术过程方法、工具和性能基准等。>*

*<It is important to establish the exit or acceptance criteria for transitioning the product. These criteria determine the acceptability of the deliverable work products and shall be specified in this section. Representatives of the transitioning organization and the acquiring organization shall sign a formal agreement, such as a Service Level Agreement, that outlines the acceptance criteria. Any technical processes methods, or tools as well as performance benchmarks required for product acceptance, shall be specified in the agreement.>*

文档控制

Document Control

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文档修订历史

Document History

<本表格包含对模板文档所作的修订历史。>

<This table contains a history of the revisions made to this template document.>

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