

Transition to Global Customer Support - Checklist Template

Customer:

Project:

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# Implementation Transition to Global Customer Support Checklist

The purpose of this checklist is to confirm that a customer is stable and ready to be transitioned to Support and to Cloud Services if a Cloud customer.

JDA Cloud Services (CS) team’s involvement in a software implementation project will depend on the services JDA Cloud Services is contractually responsible to deliver. This information is mandatory for the JDA Global Customer Services and Cloud Services teams to effectively run post go-live operations for the Customer.

In the follow section deliverables must be stored on the Customer’s jCES site. Tasks should be completed *prior* to scheduling the pre-transition meeting between Consulting, Global Customer Services and Cloud Services. Document names and jCES locations must be detailed in the Transition to Global Customer Services document.

* **Design Phase**
* Functional and Technical Design specification
* **Construct Phase**
* Batch Functional and Technical Specifications
* About Your Installation – Application and Configuration Management Document
* Cloud has shared the environment checklist
* **Validate Phase**
* SIT sign-off with test cases and test results
* UAT sign-off test cases and test results
* Performance and batch benchmark results test cases and test results
* Cloud Services Protocols and Procedures Document has been shared
* CS Post Go-Live support processes established
* **Deploy Phase**
* Go Live checklist
* Deployment Plan
* End User training conducted
* Golden version of Code transitioned to CS
* CS code branch setup in Version control tool
* **Go-Live Verification Checkpoint Completed by Strategic Services**
* **Transition phase**
* Open Issues List
* Open Issues – No Sev 1 or Sev 2 issues outstanding unless agreed to by Global Customer Services and Cloud Services in advance
* Open Product Issues list in JIRA/JPower as Sev 1 or Sev 2 issues
* Final Project documents uploaded to jCES and CS SharePoint
* Action plan published and agreed upon with customer for all open issues
* Completed Transition to Global Customer Services document
* All known product modification issues are logged and are in the process of being addressed by Consulting Services or Development Services
  + **Customer** 
    - Key users have been trained and demonstrated the ability to run the software without continuing Consulting Services assistance.
* The Customer has signed all Phase signoffs, milestone signoffs. The final Project sign off will take place prior to the formal handover to Global Customer Services.
* Audit reports and action plan for NC’s and recommendations met (CS)
* All other open issues have been reported and logged appropriately with Global Customer Services, with a customer assignee as the contact.
* Customer understands, at a high level, the roles of Support, Education, and Consulting Services.
* **If the Go-Live Verification Checkpoint Completed by Strategic Services recommends that the Customer postpone go-live has the Customer elected to move forward and acknowledged the associated risks?**
* After the Transition to Global Customer Services Document has been completed and sent to the Support Manager for each product, a pre-transition call/meeting with the Consulting Services, Global Customer Services and Cloud Services has been scheduled or has taken place.

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| Review Required | Name | Sign-off |
| JDA Consulting Services Project Manager |  |  |
| JDA Cloud Services Project Manager |  |  |
| JDA Global Customer Services Manager |  |  |