Incident Management Process / System Implementation Task Plan

ID	TASK NAME	% COMP	STATUS	EST START DATE	ACTUAL START DATE	ACTUAL END DATE	ASGN	DELIVERABLES
100	**PROJECT MANAGEMENT**							**Implementation Task Plan**
110	Create Task Plan							Implementation Task Plan
120	Define Project Objectives/Scope (Scope = who, what, when)							Project Objectives Document
130	Select Project Leader & Team							Team Roles & Responsibilities
140	Prepare/Present Project Kick-Off							Meeting Agenda/Minutes
150	Obtain Commitment to Proceed							Agreement to Proceed
160	Develop Communication Plan							**Communication Plan**
160	Ongoing Project Management							Bi-weekly Status Reports / Updated Implementation Task Plan
170	Ongoing Communication							Updated Communication Plan
200	**BEGIN PROCESS IMPLEMENTATION**							
210	Publish Final Process Definition Document							**Process Definition Report**
220	Determine Needed/Document Procedures and Work Instructions							**Process-Related Procedures and Work Instructions**
230	Develop Process Education Materials							Process Education Materials
240	Submit for Review							
250	Revise as Needed							**Final Process Education Materials**
260	Schedule Process Education							
270	Conduct Process Education – Core Process Implementation Team							
280	Conduct Process Education – IT Management							
290	Conduct Process Education – IT Staff							
300	**CONDUCT SOFTWARE EVALUATION (As Needed)**							**Software Selection Report**
310	Define Goals							Documented Project Goals

Incident Management Process / System Implementation Task Plan

ID	TASK NAME	% COMP	STATUS	EST START DATE	ACTUAL START DATE	ACTUAL END DATE	ASGN	DELIVERABLES
320	Define/Weight Requirements							Request for Information (inc. project goals and Requirements Matrix)
330	Select Candidates							Vendor Contact List
340	Evaluate Candidates							Completed Evaluation Matrix
350	Evaluate Finalists							Software Selection Report
350.1	Conduct Demonstrations							Completed Evaluation Forms
350.2	Conduct Hands-On Testing							Complete Requirements Checklists
350.3	Contact Vendor References							Complete Questionnaires
350.4	Review Demo / Testing / Reference Results							
360	Select Product							Product Recommendation
360.1	Schedule Site Visit for Selected Product							
360.2	Visit Site							Completed Reference Questionnaire
370	Prepare and Present Recommendation to Management							Recommendation Presentation / Report
380	Finalize Software Selection							Final Software Selection Report
390	Negotiate Purchase							Signed Contract(s)
400	**DESIGN MANAGEMENT SYSTEM**							**System Design Document**
410	Design/Document Mgmt System Configuration / Modifications							
410.1	Identify / Design Required Changes (if any) to Application Flow							
410.2	Identify / Design Required Changes (if any) to Screens / Fields							
410.3	Identify / Design Required Changes (if any) to Interfaces							
410.4	Identify / Design Required Changes (if any) to Reports							
420	Prepare System Design Document							System Design Document
430	Submit for Review / Approval							

	Incident Management Process / System Implementation Task Plan							
ID	TASK NAME	% COMP	STATUS	EST START DATE	ACTUAL START DATE	ACTUAL END DATE	ASGN	DELIVERABLES
440	Revise Design Document as Needed							Final System Design Document
500	**CONVERSION PLANNING**							**Conversion Plan**
510	Define Conversion Approach (i.e., what (if any) data will be converted / map to fields in new system) – Consider relevancy and cleanliness of existing data							
520	Determine Conversion Process (i.e., how the conversion will be performed)							
530	Define Conversion Resource Requirements							
540	Develop Conversion Plan							Conversion Plan
550	Submit for Review / Approval							
560	Revise Conversion Plan as Needed							Final Conversion Plan
600	**DEVELOP TRAINING PROGRAM**							**Training Plan**
610	Determine Training Needs (consider system administration, database administration, system and report development and customization, and end-user requirements)							
620	Determine How Training Will be Provided (i.e., by vendor, in-house)							
630	Determine and Document Training Facility Requirements							
640	Develop Training Plan (which reflects needs, how training will be provided, facility requirements and a schedule).							Training Plan
650	Submit for Review / Approval							
660	Revise Training Plan as Needed							Final Training Plan
670	Schedule Training Facilities							

	Incident Management Process / System Implementation Task Plan							
ID	**TASK NAME**	**% COMP**	**STATUS**	**EST START DATE**	**ACTUAL START DATE**	**ACTUAL END DATE**	**ASGN**	**DELIVERABLES**
680	Begin Executing Training Plan (e.g., the System Administrator may want to attend training prior to installing the software)							
700	**HARDWARE / SOFTWARE INSTALLATION**							**Hardware / Software Installation Plan**
710	Determine and Document Hardware / Software Requirements as Needed to Support System (including client, server, RDBMS, network)							
720	Prepare Purchase Order(s) / Obtain Required Approvals							Approved Purchase Order(s)
730	Order Hardware / Software							
740	Prepare Hardware / Software Installation Plan							Hardware / Software Installation Plan
750	Execute Hardware / Software Installation Plan							
800	**DEVELOP SYSTEM**							**System Environment(s)**
810	PREPARE SYSTEM ENVIRONMENT							
810.1	Establish Test Environment							Test Environment
810.2	Establish Training Environment (typically the same Application level as the production environment but with its own database)							Training Environment
810.3	Establish Production Environment							Production Environment
820	USER PROCEDURES & TRAINING							**Training Materials**
820.1	Develop Procedures							Procedures Guide

Incident Management Process / System Implementation Task Plan

ID	TASK NAME	% COMP	STATUS	EST START DATE	ACTUAL START DATE	ACTUAL END DATE	ASGN	DELIVERABLES
820.2	Develop / Refine Training Materials (including System Users Guide, Quick Reference Card, and exercises that span the life cycle of a Incident)							Training Materials
830	PRODUCT CUSTOMIZATION							
830.1	Configure Product (e.g., Setup security classes, create user profiles, etc.)							Configured Product
830.2	Customize Product Using System Design Document (i.e., modify screens / fields)							Customized Product
830.3	Develop / Customize Reports							Customized Reports
830.4	Develop / Customize Interfaces							Customized Interfaces
830.5	Prepare System Document							System Documentation
840	TESTING							
840.1	Develop System Test Plan							System Test Plan
840.2	Prepare Test Data							
840.3.1	Conduct Unit Testing							Incident Log
840.3.2	Resolve Incidents Identified During Unit Testing							
830.3.3	Re-Test as Needed							Updated Incident Log
840.4.1	Perform Integration Test							Incident Log
840.4.2	Resolve Incidents Identified During Integration Test							
840.4.3	Re-Test as Needed							Updated Incident Log
840.5.1	Perform User Acceptance & Stress Test							Incident Log
840.5.2	Resolve Incidents Identified During User Acceptance & Stress Test							
840.5.3	Re-Test as Needed							Updated Incident Log
850	CONVERSION PREPARATION							
850.1	Develop Conversion Programs							Conversion Programs
860	PRODUCTION TURNOVER							

	Incident Management Process / System Implementation Task Plan							
ID	**TASK NAME**	**% COMP**	**STATUS**	**EST START DATE**	**ACTUAL START DATE**	**ACTUAL END DATE**	**ASGN**	**DELIVERABLES**
860.1	Prepare Documentation Required for Production Turnover							Turnover Package
860.2	Setup Backup Programs and Provide for Disaster Recovery							Backup / Recovery Programs in Place
860.3	Execute Turnover to Production							Approved Turnover Package
900	**CONDUCT TRAINING**							
910	Setup Training Facility (e.g., install the client software, make sure the necessary security has been setup on the system)							Training Facility Ready
920	Conduct User Training							User Training
930	Clean-up the Training System (i.e., remove the client software from the PCs in the training facility)							Training Facility Restored
1000	**IMPLEMENT SYSTEM**							
1010	Initialize & Tune Production Environment (i.e., verify production database is empty and optimally sized and tuned)							Production Environment Ready
1020	CONVERT DATA							
1020.1	Freeze and Secure the Existing Production Environment (to ensure no additional records are added)							
1020.2	Create Conversion Files							Conversion Files
1020.3	Purify Conversion Files							Clean Conversion Files
1020.4	Verify Conversion Files are Clean							
1020.5	Note Input Count							Input Count
1020.6	Convert Files							Output Count
1020.7	Verify the Results (i.e., verify output count matches input count)							Verified Results

	Incident Management Process / System Implementation Task Plan							
ID	**TASK NAME**	**% COMP**	**STATUS**	**EST START DATE**	**ACTUAL START DATE**	**ACTUAL END DATE**	**ASGN**	**DELIVERABLES**
1020.8	Resolve Any Conversion Incidents							Conversion Status Report
1030	Complete System Implementation							Go Live!
1040	MONITOR IMPLEMENTATION							
1040.1	Monitor System							Incident Log
1040.2	Monitor Processes/Procedures							Incident Log
1040.3	Record/Resolve Incidents							Updated Incident Log
1500	**POST IMPLEMENTATION REVIEW**							
1510	Perform 30 Day Follow Up Review							
1510.1	Review Objective Attainment							
1510.2	Review System & Process Performance							
1510.3	Solicit Feedback from Users							
1510.4	Document Review Results							Implementation Review Results
1520	Fine-tune System / Processes							Fine-tuned System / Processes
1530	Document Future Enhancements							Include in Project Completion Report
1540	Prepare Project Completion Report							Incident Completion Report