



Checkpoint #2
Phase 2: Installing the System

Using the Checkpoint #2 Phase 2: Installing the System

Completed by:	Customer and FACTS Implementation Consultant
Purpose:	<p>To review status of the Implementation Project through the System Installation Phase and determine additional action required to accomplish goals of System Installation Phase.</p> <p>In the System Installation Phase, the foundation of the system is prepared and set up for the Facts implementation. Three steps comprise this phase.</p> <ul style="list-style-type: none">> Setup includes setting up the Facts and Providex software.> In the Modifications step, any modifications and software interfaces required to customize the Facts system for the Customer's environment are developed.> During Data Conversion, existing files to be converted are identified, converted and verified.
How it is used:	This form is completed by the Customer and Local Facts Implementation Team to assess the progress on the project through the System Installation Phase.
When it is used:	Complete at the end of the Installing the System Phase.
Who uses it:	Local FACTS Office and Customer
File under:	Installing the System/Checkpoint #2
Last revised:	05/01
File:	<p>Checkpoint #2 Feedback Form.exe</p> <p>This is a self-extracting zipped MS Word document and must be printed/viewed through MS Word. This file is located in the Software Solutions Nexus – Facts/Documentation and Education/PIA.</p> <p>Note: The Software Solutions Nexus is a private extranet and is available for local Facts personnel only.</p>

Partnership in Action

Checkpoint #2- Installing The System

(Customer Comments)

This checkpoint offers the Customer and local FACTS office the opportunity to review all steps accomplished in this phase of the implementation, review all action items for each step to ensure they are completed satisfactorily and examine areas where adjustments must be made as well as areas that need improvement. You should also determine if any open action items or issues must be resolved in order to progress to the next phase. Please communicate your comments, suggestions or concerns for each step in this phase.

STEP:

Delivery and Setup—This step includes setting up the Facts and Providex software. The software is loaded including the Facts, Providex, and any third party software. Initial software testing and tuning is completed.

Modifications—In this step, the FACTS team and the Customer defines any modifications and/or software interfaces required to tailor the FACTS system for the Customer's environment. This begins a process which includes development of requirement specifications, custom programming, delivery of a prototype (if applicable), testing, documentation, installation, training and final acceptance of the custom software modifications.

Data Conversion—This step includes identifying existing files to be converted, converting the files, creating and editing new files, and backup of the new files. File layouts are exchanged, the method of conversion is determined (manual, diskette/tape or serial/parallel communications) and default values to be used for initial file setups are defined. If files are electronically converted by the local FACTS office, testing and acceptance of the conversion must be completed by the Customer prior to the final conversion before going live. A final conversion plan, as well as a contingency plan should be established if all files cannot be converted by the targeted date.

Partnership in Action

**Checkpoint #2- Installing The System
(Customer Comments)**

STEP:

Other Comments

Customer Name: _____

Date: _____

Name: _____

Title: _____

**Partnership in Action
Checkpoint #2- Installing The System
(Local FACTS Office Comments)**

This checkpoint offers the Customer and local FACTS office the opportunity to review all steps accomplished in this phase of the implementation, review all action items for each step to ensure they are completed satisfactorily and examine areas where adjustments must be made as well as areas that need improvement. You should also determine if any open action items or issues must be resolved in order to progress to the next phase. Please communicate your comments, suggestions or concerns for each step in this phase.

STEP:

Delivery and Setup—This step includes setting up the Facts and Providex software. The software is loaded including the Facts, Providex, and any third party software. Initial software testing and tuning is completed.

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Partnership in Action Checkpoint #2- Installing The System (Local FACTS Office Comments)

STEP:

Other Comments

[illegible]

Facts Office: _____	Date: _____
Name: _____	Title: _____