



## ***First 30 Days Checklist***

## Using the First Thirty Days Checklist

<b>Presented by:</b>	FACTS Implementation Consultant
<b>Completed by:</b>	FACTS Implementation Consultant
<b>Purpose:</b>	To provide a list of activities that should be completed during the first live processing cycle.
<b>How it is used:</b>	Complete each activity on the checklist. Note any problems or open issues on the Open Issues Log.
<b>When it is used:</b>	During the First 30 Days.
<b>Who uses it:</b>	Local FACTS Office Project Team and Customer
<b>File under:</b>	After the Installation/First 30 Days
<b>Last revised:</b>	05/01
<b>File:</b>	First 30 Days Checklist.exe

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.

Note: The Software Solutions Nexus is a private extranet and is available for local Facts personnel only.

## First 30 Days Checklist

- ☐ Complete open tasks from Project Plan.
- ☐ Review daily, weekly, and monthly processing including execution of reports and registers.
- ☐ Review available support resources and how to use them:
  - ☐ Policies and Procedures Manual
  - ☐ FACTS Documentation and On-line Help
  - ☐ FACTS Implementation Consultant
  - ☐ Programmer Analyst
  - ☐ Technical Support Hotline
- ☐ Review and discuss system usage (disk, memory, terminals, printers, etc.) and perform hardware and/or software tuning as required.
- ☐ Identify any future application requirements with timelines.
- ☐ Assess the need for additional training
- ☐ Perform a Post-Implementation Review
- ☐ Continually review Open Issues Log. Resolve open action items, provide specific resources where necessary. Follow up to ensure satisfaction.
- ☐ Read Software Solutions newsletters and distribute to appropriate personnel. Helpful tips and techniques are included in every issue.
- ☐ Find out if the Customer is referenceable. If so, let the Sales Organization know. If not, identify what is keeping the Customer from being satisfied, and enter the issues on the Facts Open Issues Log. Work to get the issues resolved.
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