



***Project Plan Template and
Detail Task Worksheets***

Using the Project Plan Template and Detail Task Worksheets

Completed by: FACTS Implementation Consultant

Purpose: This template is helpful if you decide to layout the project in Microsoft Project, an automated project manager. By providing a pre-configured plan based on Partnership in Action, it serves as a guide to the methodology and saves you the time required to enter the individual project tasks.

The Detail Task Worksheets provide the same pre-configured project tasks in more detail. It can be used by the Implementation Consultant and the Customer on a daily basis. These worksheets are developed in MS Word, thus they do not offer the automated tracking and updating that MS Project provides.

How it is used: Use the template as a guide to the individual tasks required to complete the implementation. Edit the steps to tailor them to your project. Then enter the start date and the expected duration for each task. The program will create a Gantt Chart of the project, showing you a projected completion date for each milestone and for the project as a whole.

As changes occur, they can be entered into the Project Plan Template. The software will automatically update the schedule. For more information on how to modify the template, refer to your MS Project Reference Manual or on-line help.

You may want to use the Project Plan Template to plan and track the project at a high level, while using the Detail Task Worksheets to track the project on a daily basis. Use the Detail Task Worksheet to create a more detailed plan, listing all tasks required to complete each step, including prerequisites and follow-up tasks.

When it is used: The template and/or worksheets are used during the Project Plan step to set up the project. They are used throughout the project to keep the entire Team informed of tasks accomplished (time, when, where and how) and upcoming tasks.

Who uses it: Local FACTS Office and Customer

File under: Planning/Project Plan

Last revised: 05/01

File: Project Plan Worksheets.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.

FACTS Project Plan Template

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Project Definition Detail Task Worksheet

ID#	Task	Responsibility	Onsite/ Offsite	Apprx Time	Actual Time	Start Date	Completion Date
	Prerequisites						
	Signed contract by customer and local FACTS office	Sales Rep	Offsite				
	Select local FACTS office Implementation Team	Management	Offsite				
	Project Definition meeting scheduled by Sales Rep	Sales Rep	Offsite				
	The following tools submitted by Sales Rep: a) Business Needs Analysis b) Project Scope Assessment c) System Configurator (approved by Team; forward to Administrator) d) Customer FACTSheet	Sales Rep	Offsite				
	Order software from Software Solutions	Administration	Offsite				
	Order third party software	Administration	Offsite				
	Tasks						
	Overview of customer account (Customer FACTSheet)	Sales Rep	Offsite				
	Review contract conditions	Sales Rep	Offsite				
	Review Business Needs Analysis and other sales notes (RFP, RFI)	Sales Rep	Offsite				
	Review preliminary modifications from sales cycle	Sales Rep	Offsite				
	Review customer expectations	Sales Rep	Offsite				
	Confirm hardware and software delivery dates	Sales Rep	Offsite				
	Follow-up						
	Contact Forms Division or Forms Supplier	Sales Rep	Offsite				
	Send Welcome Letter to Customer	Professional Services Mgr.	Offsite				
	Schedule Project Strategy Meeting with Customer	Implementation Consultant	Offsite				

Project Strategy Detail Task Worksheet

ID#	Task	Responsibility	Onsite/ Offsite	Apprx Time	Actual Time	Start Date	Completion Date
	Prerequisites						
	Confirm Project Strategy Meeting with customer. Ensure Customer received Welcome Letter and Customer Planning Guide.	Implementation Consultant (IC)					
	Complete action items on Project Strategy Agenda	Customer					
	Tasks						
	Tour Customer's facilities and meet key personnel	FACTS Project Team	Onsite				
	Present overview of Partnership in Action - Implementation Methodology	IC					
	Define Customer's project goals and expectations	IC and Customer					
	Present Local FACTS office goals and commitments	IC					
	Select and finalize the FACTS Implementation Team	IC and Customer					
	Define communication channels throughout project and beyond	IC and Customer					
	Discuss high level education requirements	IC and Customer					
	Discuss high level custom modification requirements	IC and Customer					
	Discuss site planning and preparation requirements	IC and Customer					
	Discuss high level data conversion requirements	IC and Customer					
	Discuss special forms requirements	IC and Customer					
	Discuss Operations Analysis Survey Meeting(s) a) identify people to be surveyed b) areas to concentrate on	IC and Customer					
	Present preliminary Project Plan template. Information gathered can be customized into a Project Plan and used to determine Live date.	IC					
	Present Gordon Graham prerequisite reading	IC					
	Follow-up						
	Schedule Operations Analysis Survey Meeting(s) a) send letter b) confirm date	IC					

Project Plan Detail Task Worksheet

ID#	Task	Responsibility	Onsite/ Offsite	Apprx Time	Actual Time	Start Date	Completion Date
	Prerequisites						
	Information gathered at Project Strategy Meeting	Implementation Consultant (IC) and Customer					
	MS Project (Project Plan) or MS Word (Detail Task Worksheet)	Local FACTS Office					
	Tasks						
	Update Project Plan and/or Detail Worksheets with resources, milestones, constraints, and additional tasks identified from Project Strategy Meeting	IC and Customer					
	Present and agree on updated Project Plan / Worksheets	IC and Customer					
	Begin project tasks	IC and Customer					
	Follow-up						
	Confirm Operations Analysis Meeting	IC					
	Update Project Plan and/or Worksheets with tasks completed and setbacks. Review periodically to ensure agreement.	IC and Customer					

Operations Analysis Detail Task Worksheet

ID#	Task	Responsibility	Onsite/ Offsite	Apprx Time	Actual Time	Start Date	Completion Date
	Prerequisites						
	Confirm meeting with Customer.	Implementation Consultant (IC)					
	Management understands importance and supports time/resources needed.	Customer Executive Mgmt.					
	Interviewees have completed survey questionnaire for their dept.	Key End Users					
	Review Business Needs Analysis to prepare	IC					
	Tasks						
	Conduct Operations Analysis Surveys of each department. Gather information on current system. (current policies, procedures, forms, reports, etc.) <ul style="list-style-type: none"> Identify values for system and application setup parameters Review security and data conversion requirements Identify additional reports required (Report Writer or mod) Identify any other special forms required 	IC and Project Leader					
	Follow-up						
	Review findings with Executive Management <ul style="list-style-type: none"> System and application setup parameters and implications Areas requiring special attention (workarounds, mods, new policies and procedures that need to be established, Report Writer reports needed, other) 	IC and Project Leader					
	Resolve open issues	All					
	Obtain Executive Management's approval on: <ul style="list-style-type: none"> additional modifications/enhancements system and application setup parameters 	IC					
	Begin development of Policies and Procedures Manual	Customer					
	Order forms	Customer					
	Complete Checkpoint #1 - Planning	IC and Customer					

Delivery and Setup Detail Task Worksheet

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Modifications and Interfaces Detail Task Worksheet

ID#	Task	Responsibility	Onsite/ Offsite	Apprx Time	Actual Time	Start Date	Completion Date
	Prerequisites						
	Review desired modifications and prioritize; risks, constraints, and budget	Implementation Consultant (IC) and Customer					
	Tasks						
	Develop Modification Requirement Specifications for required modifications	IC/Programmer & Customer					
	Estimate and propose modification requirements. Obtain approval	Programmer					
	Develop modifications	Programmer					
	Develop prototype and walk through with customer. Obtain approval (Optional)	Programmer					
	Perform initial testing and document modifications	Programmer					
	Install and train at customer site	Programmer					
	Perform testing	Customer					
	Obtain final Customer approval	Programmer					
	Modify custom forms and test (if required)	Programmer					
	Follow-up						
	Provide support of modifications as stated in estimate	Local FACTS Office					

Data Conversion Detail Task Worksheet

ID#	Task	Responsibility	Onsite/ Offsite	Apprx Time	Actual Time	Start Date	Completion Date
	Prerequisites						
	Determine if electronic data conversion is needed (use Project Scope Assessment)	IC & Project Leader					
	Provide a cost estimate for electronic data conversion and obtain signed contract	IC					
	All existing data files are cleaned up prior to electronic conversion	Customer					
	Identify contingencies if data cannot be converted by date required	IC and Project Leader					
	Tasks						
	Review new FACTS files required	IC and Customer					
	Map files to be electronically converted and define default data	IC and Customer					
	Export existing files to a common format, i.e. ASCII & media	Customer					
	Write conversion program, convert data and perform initial testing	Programmer					
	Create conversion checklist for customer (use Mapping Worksheet) & install at customer site	Programmer					
	FACTS supporting files and others not elec. converted are keyed into system. (electronic)	Customer					
	All FACTS files are keyed into system. (manual)	Customer					
	Perform daily backup of data	Customer					
	Electronically converted files are tested - Pass #1- submit changes (use Testing Checklist)	Customer					
	Electronically converted files are tested - Pass #2 - submit changes (use Testing Checklist)	Customer					
	Final conversion plan is co-developed for static and dynamic data prior to going live	IC and Customer					
	Perform final data conversion and testing	IC/Programmer and Customer					
	Obtain final Customer acceptance of data conversion	IC and Customer					
	Follow-up						
	Completed Checkpoint #2 - Installing the System	IC and Customer					

FACTS Training Detail Task Worksheet

ID#	Task	Responsibility	Onsite/ Offsite	Apprx Time	Actual Time	Start Date	Completion Date
	Prerequisites						
	Project Leader participated in Operations Analysis surveys	Project Leader					
	Executive Management approved all FACTS parameters	Implementation Consultant (IC) and Customer					
	FACTS demonstration data loaded	FACTS System Administrator					
	Policies and Procedures Manual is completed	Customer					
	Tasks						
	Project Leader Training - (see sample outlines)	IC					
	Hardware Administration Training - (see sample outlines)	IC and/or FACTS Sys. Administrator					
	End User Training - (see sample outlines)	FACTS Trainer and/or Customer Trainer					
	Obtain Customer acceptance of training	IC					
	Follow-up						

Readiness Assessment Detail Task Worksheet

ID#	Task	Responsibility	Onsite/ Offsite	Apprx Time	Actual Time	Start Date	Completion Date
	Prerequisites						
	Modifications are completed and approved	Programmer					
	Data Conversion has been completed and approved (1st and 2nd pass)	Programmer					
	User Training is complete and approved	FACTS Trainer and Customer					
	Tasks						
	Refine test plan to include specific testing of mod's, specific data from conversion, specific FACTS features, third party software, etc.	Implementation Consultant (IC) and Customer					
	Perform Integration testing and User testing	Customer					
	Identify problem areas that need correcting	IC and Customer					
	Correct problems and review status with Project Team	IC and Customer					
	Obtain customer acceptance of new system	IC					
	Identify any additional policies and procedures prior to going live	Customer					
	Execute the Going Live Checklist	IC and Customer					
	Follow-up						
	Follow-up with open issues until resolved.	IC and Customer					
	Complete Checkpoint #3 - Training and Testing	IC and Customer					

First 30 Days Detail Task Worksheet

ID#	Task	Responsibility	Onsite/ Offsite	Apprx Time	Actual Time	Start Date	Completion Date
	Prerequisites						
	Tasks						
	Complete open tasks from Project Plan	IC and Customer					
	Review daily, weekly, and monthly processing including execution of reports and registers	IC and Customer					
	Review available support resources and how to use	IC and Customer					
	Review and discuss system usage. Perform tuning if required	IC and Customer					
	Identify any future application requirements and timeframe	IC and Customer					
	Assess the need for additional training	IC and Customer					
	Read Software Solutions newsletters for tips and techniques	Customer					
	Perform Post-Implementation review	IC and Customer					
	Follow-up						
	Continually review Open Issues Log	IC and Customer					
	Complete Checkpoint #4 - After the Installation	IC and Customer					

Ongoing Assistance Detail Task Worksheet

ID#	Task	Responsibility	Onsite/ Offsite	Apprx Time	Actual Time	Start Date	Completion Date
	Prerequisites						
	Tasks						
	Complete open tasks from Project Plan	IC and Customer					
	Review daily, weekly, monthly, and <u>annual</u> processing including execution of reports and registers	IC and Customer					
	Review available support resources and how to use	IC and Customer					
	Review and discuss system usage. Perform tuning if required	IC and Customer					
	Identify any future application requirements and timeframe	IC and Customer					
	Assess the need for additional training	IC and Customer					
	Read Software Solutions newsletters for tips and techniques	Customer					
	Complete Customer Satisfaction Survey (6 mths)	Customer					
	If going live with Gordon Graham replenishment: (6 mths) <ul style="list-style-type: none"> • Read G. Graham books • Attend Advanced Inventory Class • Start with one product line to feel comfortable 	Customer					
	Attend bi-annual Software Solutions Affiliate/Customer conference	Customer					
	Review new FACTS features and update to newest release	IC and Customer					
	Follow-up						
	Continually review Open Issues Log						

Detail Task Worksheet

ID#	Task	Responsibility	Onsite/ Offsite	Apprx Time	Actual Time	Start Date	Completion Date
	Prerequisites						
	Tasks						
	Follow-up						