



***Checkpoint #4***  
***Phase 4: After the Installation***

## Using the Checkpoint #4 Phase 4: After the Installation

<b>Completed by:</b>	Customer and FACTS Implementation Consultant
<b>Purpose:</b>	<p>To review status of the Implementation Project through the completion of the Installation and going live, and to determine on-going needs and requirements after the system has gone into Production.</p> <p>This phase consists of the ongoing support required after the system goes into production. There are two steps involved in the After the Installation Phase.</p> <ul style="list-style-type: none"><li>&gt; During the First 30 Days, support is provided during the first live processing cycle to ensure that the system is operating properly, and that users and system managers understand the system.</li><li>&gt; In Ongoing Assistance, periodic reviews are conducted to ensure that the Project Leader has a solid understanding of the functionality and flexibility of the system, and that the system is being used to its maximum potential.</li></ul>
<b>How it is used:</b>	This form is completed by the Customer and Local Facts Implementation Team to assess the ongoing requirements and needs of the Customer once the system is in Production.
<b>When it is used:</b>	Complete at the end of the implementation project.
<b>Who uses it:</b>	Local FACTS Office and Customer
<b>File under:</b>	After the Installation/Checkpoint #4
<b>Last revised:</b>	05/01
<b>File:</b>	<p>Checkpoint #4 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 #4 - After The Installation

#### (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:

**First 30 Days**—Support from the local FACTS office is critical during the first processing cycle. This support ensures that the Customer has a clear understanding of the daily business operations and procedures and weekly and monthly execution of business cycles and reporting. Also during this period, additional tuning of the system is performed for optimum performance.

---

---

---

---

---

---

**Ongoing Assistance**—Periodically it is important to review how the system is being used. This step ensures that the Project Leader/System Manager has a solid understanding of the functionality and flexibility of the system, and that all FACTS users are utilizing the system to its maximum potential. In these periodic audits, you should also review system usage (disk and memory) and any other hardware and software requirements.

---

---

---

---

---

---

#### Other Comments

---

---

---

---

---

---

---

Customer Name: \_\_\_\_\_

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

## Partnership in Action

### Checkpoint #4- After The Installation

#### (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:

**First 30 Days**—Support from the local FACTS office is critical during the first processing cycle. This support ensures that the Customer has a clear understanding of the daily business operations and procedures and weekly and monthly execution of business cycles and reporting. Also during this period, additional tuning of the system is performed for optimum performance.

---

---

---

---

---

---

**Ongoing Assistance**—Periodically it is important to review how the system is being used. This step ensures that the Project Leader/System Manager has a solid understanding of the functionality and flexibility of the system, and that all FACTS users are utilizing the system to its maximum potential. In these periodic audits, you should also review system usage (disk and memory) and any other hardware and software requirements.

---

---

---

---

---

---

#### Other Comments

---

---

---

---

---

---

Facts Office: \_\_\_\_\_  
Name: \_\_\_\_\_

Date: \_\_\_\_\_  
Title: \_\_\_\_\_