**Implementation Checklist**

**<Project Name or Release Name>**

When complete, delete all the blue instructions

The purpose of this checklist is to assist the project manager in leading the project team through the discussions and decisions that will be required for implementation of the release or system. This checklist is not meant to serve as a place to document the decisions, tasks, responsibilities, or schedules, but instead as a reminder for the topics to cover with the team

If the vendor is responsible for providing an implementation and/or transition plan deliverable, this checklist can be used to verify that the vendor’s plan covers all necessary information. If this is an NDIT build or the project manager is responsible for providing an implementation and/or transition plan, then decisions related to this checklist should be added to existing project documents. If the project manager wants to produce an independent document, an Implementation and Transition Plan template can be found on the PMO website.

# questions to consider

* What is the project team implementing? (The full system? A specific release? Certain functionality?)
* Will the system go live to all users at the same time?
* Will there be a mock go live?
* Will there be a pilot?
* What is NDIT’s involvement?

# items to note

* At least one month prior to go live, depending on the size of your project, determine detailed go-live tasks with the team If there is no implementation plan to document these, they can be added to the schedule, or an Excel spreadsheet, or Word table
* Determine roles and responsibilities during implementation If there is no implementation plan to document these, they can be added to the RACI in the project plan

# IMPLEMENTATION CHECKLIST

Multiple options are provided, choose the ones that are applicable to your project.

**General Communication**

Work with change practitioner, if one is assigned

Determine what communications you need to send to keep users and stakeholders informed

Determine who will be authoring and sending communications

Determine when communications should be sent and by what method

**Operational Setup**

Communicate and incorporate organizational changes

Review and communicate policy changes

Communicate and review interim business process for Mock Go Live or Pilot Go Live

Communicate and review issue identification and escalation

**User Setup**

Set up all user accounts

Validate user access at all security levels/groups

Remediate user access issues

Verify all users have workstations that meet minimum requirements, with appropriate configurations and correct browsers installed

**Training**

Verify users have been trained

Verify users have access to training materials for future reference

**Code Merge (merging code into previous releases)**

Merge code into all appropriate environments (UAT, production, etc.)

Merged code is validated and tested in all environments

**Code Freeze**

Determine code freeze timeframe

Define scope of code freeze

Determine how defects are handled during code freeze

Execute code freeze

**Change request if an NDIT-hosted system (1-2 weeks before Go Live)**

Create Change in Service Management application

Define justification

Summarize implementation plan

Summarize risk and impact analysis

Summarize backout plan

Summarize test plan

Summarize who is impacted

Determine if public notification is required and to which group (only people who have signed up will receive this)

**Notify Service Desk (at least 1 week before Pilot or Go Live)**

Email Randy Jensen ([rwjensen@nd.gov](mailto:rwjensen@nd.gov))

Provide high-level information on what the system is

Provide information on how system is accessed

Provide information on where to send tickets if there is a problem (e.g., if they go to the vendor)

Optional: meet with service team to demonstrate system at high level and explain what it does

**Notify Accounting – at Go Live for projects that require NDIT billing outside of hourly costs (e.g., servers)**

Notify Brandee Rensch

Provide project name and what service/product needs to be billed

Include original quote if we provided one to the customer

**Mock Go Live or Pilot Data Conversion**

Determine data conversion approach

Determine preparation activities

Convert and validate data

**Mock Go Live or Pilot Interfaces**

Identify interfaces that will be active for Mock Go Live or Pilot

Identify necessary environments

Configure any necessary interface environments

Validate interface configurations

**Mock Go Live or Pilot Site Support**

Determine site support resources

Determine how issues will be addressed, monitored, and escalated

Determine how defects will be addressed and retested

**Mock Go Live or Pilot Cutover**

Determine cutover timeline

Develop detailed activities required for cutover and their dependencies

Identify activity owners

Identify decision points

Finalize Mock Go Live or Pilot entry and exit criteria

Communicate cutover plan

Execute the cutover

**Mock Go Live or Pilot Entry Criteria (example)**

Participants have been identified

User setup activities are complete

Participants have been trained

Mock Go Live or Pilot cutover plan has been developed, reviewed, agreed-upon, and tested

Mock Go Live or Pilot cutover activities are complete

Mock Go Live or Pilot communications have been delivered

Interface readiness activities are complete

Data conversion preparation activities are complete

Site support resources have been identified

Situation room has been set up to begin resolving issues

**Mock Go Live or Pilot Exit Criteria (example)**

Priority defects identified during Mock Go Live or Pilot have been resolved and retested

Mutually-agreed-upon remaining defects not fixed during Mock Go Live or Pilot have been reviewed and there is a mutually-agreed-upon plan to resolve those defects

Mock Go Live or Pilot lessons learned have been documented, reviewed, and incorporated into the implementation plan

**Mock Go Live or Pilot Rollback Plan**

Identify rollback triggers

Define rollback procedures

Determine rollback activities and owners

**Go/No Go Decision**

Determine go/no go decision process

Determine go/no go decision points

Identify who will make the go/no go decision

Determine what information will be needed for the go/no go decision

**Data Conversion**

Determine data conversion approach

Determine preparation activities

Convert and validate data

**Interfaces**

Identify necessary environments

Configure any necessary interface environments

Validate interface configurations

**Site Support**

Determine site support resources

Determine how issues will be addressed, monitored, and escalated

Determine how defects will be addressed and retested

**Cutover**

Determine cutover timeline

Develop detailed activities required for cutover and their dependencies

Identify activity owners

Identify decision points

Finalize Go Live entry and exit criteria

Communicate cutover plan

Execute the cutover

**Go Live Entry Criteria**

All agreed-upon fixes and or system updates

Training activities are complete

User setup activities complete

Cutover plan has been developed, reviewed, agreed-upon, and tested

Cutover activities are complete

Interface readiness activities are complete

Data conversion preparation activities are complete

Problem resolution process identified

Communications have been delivered

**Rollback Plan**

Identify rollback triggers

Define rollback procedures

Determine rollback activities and owners