Transition Plan

|  |  |
| --- | --- |
| Prepared by: |  |
| Project #: |  |
| Submitted to: |  |
| Date submitted |  |
| Document version: |  |

**Document Instructions**

*<This document template contains directions for use or sample entries. These directions are enclosed in brackets (< >) and are italicized. They are included to help you fill out the form. As you complete the form, delete these instructions.*

*Please follow this document naming convention to facilitate document search and retrieval:*

*<project code (if appropriate)> <project name (abbreviated)> <document name (abbreviated)> <version (if appropriate)>*

*All documents should be posted to the appropriate project folder in SharePoint. >*

**Document History**

*<The document history is a log of changes that are made to the document, who made the changes, and when. For example, the initial creation of the document may contain the following: Version 0.1, Date 1/1/2004, Author Charlie Brown, Status Initial creation. Subsequent updates to the document will be Version 0.2, 0.3, etc. The first published version of the document should be Version 1.0.>*

**Table: Document History Table**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Version** | **Date** | **Author** | **Status** | **Revision Descriptions** |
| 0.1 | Mm/dd/yy |  | Initial Draft |  |
| 1.0 | Mm/dd/yy |  | First Published |  |
|  |  |  |  |  |

**Approvals**

*<In lieu of this Approval section, which requires multiple signatures on one document, you may elect to use the Approval Memo template. Distribute both this document and the Approval Memo, requesting that only the memo be printed, signed and returned to indicate approval.>*

Your signature below indicates that this document meets its objectives and is acceptable.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Signature |  |  | Signature |  |
| Name |  |  | Name |  |
| Title |  |  | Title |  |
| Date |  |  | Date |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Signature |  |  | Signature |  |
| Name |  |  | Name |  |
| Title |  |  | Title |  |
| Date |  |  | Date |  |

**Table of Contents**

[1 Purpose of This Document 4](#_Toc144703569)

[2 Acronyms 4](#_Toc144703570)

[3 Introduction 5](#_Toc144703571)

[3.1 Goals 5](#_Toc144703572)

[3.2 Assumptions 5](#_Toc144703573)

[3.3 Risks 5](#_Toc144703574)

[3.4 Other Considerations 5](#_Toc144703575)

[4 Transition Team 5](#_Toc144703576)

[5 Transition Tasks 6](#_Toc144703577)

[6 Transition Planning 6](#_Toc144703578)

[6.1 Release Process 6](#_Toc144703579)

[6.2 Data Migration 7](#_Toc144703580)

[6.3 Problem Resolution 7](#_Toc144703581)

[7 Resources 7](#_Toc144703582)

[7.1 Facilities 7](#_Toc144703583)

[7.2 Hardware 7](#_Toc144703584)

[7.3 Software 7](#_Toc144703585)

[7.4 Documentation 7](#_Toc144703586)

[7.5 Personnel 8](#_Toc144703587)

[7.5.1 Production Support Resources 8](#_Toc144703588)

[7.5.2 Transition Resources 8](#_Toc144703589)

[8 Transition Training 8](#_Toc144703590)

[8.1 Required Skill Levels 8](#_Toc144703591)

[8.2 Training Needs 8](#_Toc144703592)

[8.3 Training Plan 8](#_Toc144703593)

[9 Communication Plan 9](#_Toc144703594)

[10 Timelines and Milestones 9](#_Toc144703595)

[11 Appendices 9](#_Toc144703596)

[12 Glossary of Terms 9](#_Toc144703597)

# Purpose of This Document

The purpose of this *Transition Plan* is to establish the activities, roles and responsibilities for transitioning an application from the testing environment to the production environment.

# Acronyms

*<Provide all acronyms that may be used within this document.>*

**Table: Acronyms Used in This Document**

| **Acronym** | **Definition** |
| --- | --- |
| SDLC | Software development lifecycle |
|  |  |
|  |  |

# Introduction

<Provide a brief overview of the transition goals, any assumptions that the plan is based on, and any risks that have been identified that could severely limit your ability to complete the transition on schedule.>

## Goals

[Enter text here]

## Assumptions

[Enter text here]

## Risks

[Enter text here]

## Other Considerations

[Enter text here]

# Transition Team

<List the members of the transition team, providing the name of the person who will fulfill each role.>

| **Transition Role** | **Assigned Resource** |
| --- | --- |
| Project Manager / Application Lead |  |
| Transition Team Lead |  |
| Application Development |  |
| Radio  |  |
| Video |  |
| Voice  |  |
| Data Networking |  |
| Server |  |
| Security |  |
| Desktop |  |
| Administrative Support |  |
| Project Management Office |  |
| Database Administration - Oracle |  |
| Database Administration – SQL Server |  |
| Help Desk |  |
| Web Services |  |

# Transition Tasks

<List the tasks that must be accomplished during the transition process. Some tasks will be repeated for each deliverable—be sure to include each task for each deliverable. This list of tasks can then be given to the project manager to be included in the MS Project plan for the development project. The following table suggests tasks, roles for who is responsible for each task, and a general timeframe for when the task is due. You will probably also have additional tasks to add to the list>.

The transition tasks include:

|  |  |  |  |
| --- | --- | --- | --- |
| **ID #** | **Transition Task** | **Responsible Person** | **Due Date** |
|  | Coordinate transition planning meeting |  |  |
|  | Develop matrix of required transition resources / skills |  |  |
|  | Conduct skill gap analysis against IT support staff |  |  |
|  | Identify project activities to be completed before transition can begin |  |  |
|  | Determine transition timeline |  |  |
|  | Assign support staff to the application |  |  |
|  | Determine transition training needs |  |  |
|  | Establish support expectations |  |  |
|  | Obtain access / privileges |  |  |
|  | Acquire software license agreements for production support |  |  |
|  | Develop and conduct transition training |  |  |
|  | Notify business area(s) of production support procedures |  |  |
|  | Notify Customer Service group of transition to production status |  |  |
|  | Establish new on-call lists |  |  |
|  | Move development documentation and code to production repository |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Transition Planning

## Release Process

<Document the release process for the deliverable software. Refer to any Configuration Management standards that define an acceptable release, and indicate how Configuration Management will be applied to the operational software product.>

[Enter text here]

## Data Migration

<Describe any data that must be migrated into the deliverable software product. List any special issues with regard to data reconstruction or the migration of historical data.>

[Enter text here]

## Problem Resolution

<Specify the procedure for identifying, tracking, and resolving problems with the operational software product.>

[Enter text here]

# Resources

## Facilities

<Describe the facilities needed to support the deliverable software. This description may include safety and security requirements, special power needs, cabling, room construction, etc.>

[Enter text here]

## Hardware

<Describe the hardware and associated documentation needed to support the deliverable software. Include a description of any network or data communication requirements.>

[Enter text here]

## Software

<Describe any software and associated documentation needed to support the deliverable software. This may include database platforms, compilers, operating systems, utilities, etc.>

[Enter text here]

## Documentation

<List any additional documentation needed to support the deliverable software.>

[Enter text here]

## Personnel

### Production Support Resources

<Estimate the resources required to support the application in steady-state production and during the shakedown period. Provide the estimate as both a head count, and an FTE count, for example: 2 people at 50% (1 FTE).>

[Enter text here]

### Transition Resources

<Estimate the resources needed for the transition>.

[Enter text here]

# Transition Training

## Required Skill Levels

<Estimate the necessary level of skill to support the application, in terms of business knowledge, application knowledge, and software knowledge. List the skills, making sure not to forget the system software knowledge required>.

|  |  |  |  |
| --- | --- | --- | --- |
| **Description of Skill** | **Level of Expertise** | **Availability Requirement** | **Degree of Applicability** |
|  | Trainee, moderate, expert, etc. | Indicate where the skill must be available in the organization | Rate the applicability of the skill to the system, using a scale of 1-5, with 1=light and 5=heavy |
|  |  |  |  |
|  |  |  |  |

## Training Needs

<Based on the estimated skill levels, and some knowledge of the skill levels of the production support staff, estimate the training needs. List recommended knowledge transfer activities. List any courses that will be required, and include a schedule of when those courses are offered>

[Enter text here]

## Training Plan

<Provide a training plan, including a schedule for completing any necessary course work, and for knowledge transfer activities>.

[Enter text here]

# Communication Plan

<Establish a schedule for transition team meetings, for transition reviews, and for reports to the development project team, the production support manager, and any other DOH units involved in the transition of this application. Determine how reports are to be made (at project status meetings, at project review meetings, through email, etc.). Use the project stakeholder table to determine who has a stake in the transition progress>.

The following methods will be used to keep stakeholders and outside parties informed and involved in the transition process:

|  |  |  |
| --- | --- | --- |
| **Stakeholder** | **Method of Communication** | **Frequency of Communication** |
| Transition Team |  |  |
| Project Team |  |  |
| Project Sponsor |  |  |
| End Users |  |  |
| Outside groups, such as vendors, the public, etc. |  |  |
|  |  |  |

# Timelines and Milestones

<Estimate the length of the transition period, and the extent of overlap with development. Also estimate the length of the expected shakedown period. Assign a production delivery date. Estimated dates for the milestones of Ramp-up, going live, and entering steady-state production should be included. In addition, include the dates for any expected outside training classes for support staff that will be required>.

[Enter text here]

# Appendices

*<Include all data, facts, charts, matrices, materials and graphics that support the System Test Plan.>*

[Enter text here]

# Glossary of Terms

<Include all terms that may not be familiar to the reader>.

**Table: Glossary of Terms used in This Document**

| **Term** | **Definition** |
| --- | --- |
|  |  |