

**Operational Transfer Plan—Activity Definition****Purpose:**

The objective of this activity is to lay down the pre-requisites of rolling out an application. This is to ensure the smooth transition from the ‘project’ to the ‘going live’ stage.

**Participants:**

The Project Manager, the Project team, and the customer

**Inputs:**

Work Plan [1], Change management plan [3], Resources Plan [4]

**Process:**

1. Identify the person(s) responsible for, and involved in, all aspects of the installation process, and define their roles.
2. Document what must be completed before installation can begin.
3. Identify what must be achieved for the installation to be deemed complete.
4. Develop a schedule of all activities involved in the installation.
5. Identify all manpower and resources required for each activity.
6. Prepare a list of the backups, if any, which must be taken prior to, and on completion of the installation.
7. Verify that the software product meets requirements and is fully operational.
8. Verify that the product has been tested in the target environment using test cases established in the Test Plan. Document problems and corrective actions. Retest all equipment and software after a repair, replacement, or modification. At the completion of acceptance testing, conduct an Operational Readiness Review, which includes a physical configuration audit.
9. Conduct stress and other operational tests.
10. Obtain the customer’s acceptance and approval of the product.
11. Ensure that user training has been conducted.
12. If a current system exists, prepare a checklist to ensure that the system and data conversion is done after backups and other safety measures are taken.
13. The installation needs to be coordinated with the system owner, operations staff, support staff, and other affected organizations.
14. Transfer responsibility of the system from the project team to the system owner and support staff.
15. Ensure that maintenance support begins as planned.
16. For major software systems involving multiple organizations and interfaces with other systems, ensure that a formal announcement of the transition to production has been done.
17. Turn over all project file materials, operating documents, and other pertinent records to the maintenance staff.

**Outputs:**

Operational Transfer Plan, Checklists

**Operational Transfer—Guidelines**

1. Check if the product meets requirements.
2. Check if the product is fully operational.
3. Ensure that the customer accepted and approved the product.
4. Has the future system owner and support staff been identified?
5. Ensure that user training has been conducted.
6. If a current system exists, check to see if the system and data conversion has been performed.
7. At each installation site, has the facility been inspected to assure that the site preparation is complete and in accordance with the Installation Plan?
8. Check to see if people with whom the installation should be coordinated have been identified. Have they been informed of the installation schedule?
9. Ensure that all necessary modifications to the physical installation environment have been completed.
10. Has the hardware been tested?
11. Has the product been installed on the target environment and tested?
12. Ensure that all problems and corrective action have been documented.
13. Has all equipment and software been retested after a repair, replacement, or modification?
14. Has Acceptance Testing been conducted in the production environment using acceptance test data and test procedures established in the Acceptance Test Plan?
15. At the completion of acceptance testing, has an Operational Readiness Review, which includes a physical configuration audit, been conducted?
16. Ensure that stress and other operational tests have been conducted.
17. Will maintenance support begin as planned?
18. At end of transition period, will a formal transfer of all responsibilities to the support staff be conducted?
19. For systems involving multiple organizations and interfaces with other systems, has a formal announcement of the transition to production been done?
20. Ensure that all project file materials, operating documents, and other pertinent records have been turned over to the maintenance staff.
21. Ensure that all the person(s) responsible for, and involved in, all aspects of the installation process, have been identified.
22. Have arrangements for access to installation site (e.g. badges, etc.) been identified?
23. Has the required availability of the environment for the system to be installed in been established?
24. Has the data to be recorded at the installation site and collected after installation been identified? e.g., hardware and software configurations.