**IDOCUMENTS PROJECT INITIATION DOCUMENT (PID)**

Customer: [Customer]

Version Number: 1.0

Document Date:

Synantix order reference:

Version Control

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Version** | **Produced by** | **Details** |
|  | 1.0 | Synantix | First draft |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Distribution

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Version** | **Name** | **Organisation** |
|  | 1.0 |  |  |
|  | 1.0 |  |  |
|  | 1.0 |  |  |

©2017 Synantix Ltd. All rights reserved.

The copyright in this work is vested in Synantix and the information contained herein is confidential. This work is confidential (either in whole or part) and must not be modified, reproduced, disclosed or disseminated to others or used for purpose other than that for which it is supplied, without the prior writtem permission of Synantix.Synantix endeavours to ensure that the information in this document is correct and fairly stated, but does not accept liability for any errors or omissions.

Contents

[Version Control 1](#_Toc493063073)

[Distribution 1](#_Toc493063074)

[1. Background 3](#_Toc493063075)

[2. Document references 3](#_Toc493063076)

[3. Business goals and anticipated benefits 3](#_Toc493063077)

[4. Project success criteria 3](#_Toc493063078)

[5. ERP/Finance system integration 3](#_Toc493063079)

[6. Project methodology approach 4](#_Toc493063080)

[7. Modules purchased by [Customer] 5](#_Toc493063081)

[8. Professional Services purchased by [Customer] 5](#_Toc493063082)

[9. Deliverables in scope 5](#_Toc493063083)

[10. Companies 6](#_Toc493063084)

[11. Items highlighted as out of scope 6](#_Toc493063085)

[12. Project milestones 7](#_Toc493063086)

[13. [Customer] project team and roles 7](#_Toc493063087)

[14. Communications and reporting strategy 8](#_Toc493063088)

[15. External dependencies 9](#_Toc493063089)

[16. Change Management 9](#_Toc493063090)

[17. Project Initiation Document Approval 10](#_Toc493063091)

[Appendix 1 – Project milestone plan 11](#_Toc493063092)

1. Background

This document describes the scope of the project and roles, tasks and responsibilities covering design, configuration, user acceptance testing and operation of iDocuments for [Customer]. Once the Project Initiation has been completed, the document will be updated and circulated to [Customer] for approval.

1. Document references

This document should be reviewed together with the following related documents:

* Implementation Plan (this document)
* iDocuments Technical Specification
* Installation Pre-requisites
1. Business goals and anticipated benefits
* Please detail
1. Project success criteria
* All scope deliverables in section 7 of this document have been delivered;
* The new solution is fully operational and in day-to-day use by all appropriate employees.
1. ERP/Finance system integration

iDocuments will integrate with SAP Business One Version 9.2.

1. Project methodology approach

Implementation of iDocuments applications is grouped into major stages, each with clearly defined deliverables that are necessary for subsequent stages as shown in the diagram below.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Stage 1** | **Stage 2** | **Stage 3** | **Stage 4** | **Stage 5** |
| **PROJECT INITITIATION** | **SYSTEM DESIGN** | **CONFIGURATION** | **TRANSITION** | **GO-LIVE** |
| Handover from sales | System design workshop | Installation software | [Customer] project team prepare user documentation and training | Execute cut-over plan |
| Project kick-off | Data capture spreadsheets | Configure system | End user training | Review plan for open issues |
| Project team definition | Product installation document | Handover | Data migration if required | Go-live support |
| PID | Create SDD | System admin training | Create production and test  | Plan next phase |
| Prepare Project Plan | Present and review SDD | Data migration (if required) | Readiness review |  |
| Review technical Specification and requirements | SDD revisions | User acceptance testing |  |  |
|  | Data capture spreadsheets | Freeze system |  |  |
|  |  | Prepare cut-over plan |  |  |
| **Sign off PID** | **Sign Off SDD** | **Sign off UAT** | **System readiness sign off** | **Support handover** |

1. Modules purchased by [Customer]

The following iDocuments application modules have been purchased and will be installed on [Customer] environment as described in this document:

|  |  |
| --- | --- |
| **Application** | **Licenses** |
|  |  |

1. Professional Services purchased by [Customer]

The following Professional Services days have been purchased by [Customer] for this project:

|  |  |
| --- | --- |
| **Task** | **Days** |
| Project Management | 0 days |
| System Design | 3 days |
| Installation | 1 day |
| Configuration and testing  | 12 days |
| ERP integration | 0 days |
| [Customer] specific PO template | 0 days |
| [Customer] specific reports | 0 days |
| Data migration | 0 days |
| Handover/Training/UAT support | 2 days |
| Production system implementation planning and deployment | 1 day |
| Go-live support | 1 day |
| **TOTAL** | **20 days** |

1. Deliverables in scope

iDocuments will be configured to manage the following functions and processes:

* Please detail
1. Companies

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Companies** | **Localisation** | **Language** | **Local currency** | **System Currency** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

1. Items highlighted as out of scope

The following are **out of scope** for this project:

* To be discussed at the initiation meeting
1. Project milestones

The following are the key milestones. Once the System Design Workshop is completed a detailed Project Plan will be agreed – see Appendix 1.

|  |  |  |
| --- | --- | --- |
| **Activity** | **Date** | **Comments** |
| Project initiation meeting  |  |  |
| Requirements definition workshop |  |  |
| Availability of test environment |  |  |
| Availability of live environment  |  |  |
| Intended live date |  |  |
| Any other critical or dependent dates |  |  |

1. [Customer] project team and roles

|  |  |  |
| --- | --- | --- |
| **Role** | **Name** | **Contact details** |
| [Customer] Project Sponsor |  |  |
| [Customer] Project Manager |  |  |
| [Customer] Systems Manager |  |  |
| [Customer] User representatives |  |  |
|  |  |  |

1. Communications and reporting strategy

Synantix will produce a Project Plan at the beginning of the project review and agree this with [Customer] Project Manager.

Project Status meetings will involve key project personnel involved in the project from [Customer] and Synantix. The purpose of the meetings will be to discuss any pertinent issues and actions plans required throughout the whole of the project. Minutes will be prepared which will allow for permanent records of topics discussed, decisions agreed upon and actions to be taken. They can also be used as the basis for preparing change requests in the event of changes in the direction, scope or schedule of the project.

The minutes of the meeting should be formalized and distributed as soon as possible after the meeting, whilst the discussions are still clear in the mind of each attendee.

The frequency of the Project Status meetings will be agreed between Synantix and [Customer] Project Managers and scheduled accordingly.

1. External dependencies

None have been identified.

1. Change Management

**Definition of Scope Change Request**

A scope change is when an enhancement or change in required project resources is requested by [Customer] that is beyond the scope of the system as defined in the System Design Document (SDD).

**Change Management Process**

Major project deliverables, e.g. System Design Document (SDD) will be placed under ‘change control’ as soon as they have been completed, reviewed and approved. For example, once the SDD has been approved, all changes in succeeding phases that affect the set-up of the system for your organization needs to be reflected in a revised version of the SDD.

Any changes or variations to the project are controlled through Change Request Forms (CRF). A CRF is used to notify all parties of any specific condition which may change the costs or target date of a project and/or change the scope of the agreed work.

1. Project Initiation Document Approval

By approving this document:

* The scope of the work is defined and it is agreed upon by both parties.
* The deliverables of the project from both [Customer] and Synantix are agreed by both parties
* The milestones outlined are achievable and both parties understand the input they are required to make to achieve said milestones

Accepted On Behalf Of:

**[Customer] Synantix**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Authorised Signatory) (Authorised Signatory)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Name) (Name)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Title) (Title)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Date) (Date)

Appendix 1 – Project milestone plan

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Stage 1 – Project initiation** | **Who** | **Start** | **End** | **Related Documents** |
| Handover from sales | Synantix |  |  | Project Handover Document |
| Project kick-off | Synantix/[Customer] |  |  | Draft Project Initiation Document (PID) |
| Project team definition | Synantix/[Customer] |  |  |  |
| Prepare Project Plan | Synantix |  |  | Project Plan Appendix in PID |
| **Sign Off PID** | [Customer] |  |  | Completed PID |
| **Stage 2 – System design** | **Who** | **Start** | **End** | **Related Documents** |
| System design workshop | Synantix/[Customer] |  |  | Workshop Agenda |
| Configuration Data | [Customer] |  |  | Data Capture Spreadsheet |
| Product installation  | Synantix/[Customer] |  |  | Product installation document |
| Create SDD | Synantix |  |  | Draft System Design Document |
| SDD revisions | Synantix |  |  | Revised System Design Document |
| **Sign Off System Design Document** | [Customer] |  |  | Final System Design Document |
| **Stage 3 - Configuration** | **Who** | **Start** | **End** | **Related Documents** |
| Installation software | Synantix |  |  |  |
| Data migration (if required) | Synantix |  |  |  |
| Configure system | Synantix |  |  |  |
| Handover | Synantix |  |  | Test Scripts |
| System admin training | Synantix |  |  |  |
| User acceptance testing | [Customer]/Synantix |  |  |  |
| Freeze system | Synantix |  |  |  |
| Prepare cut-over plan | Synantix/[Customer] |  |  |  |
| **Sign Off UAT** | [Customer] |  |  | UAT sign-off form |
| **Stage 4 - Transition** | **Who** | **Start** | **End** | **Related Documents** |
| [Customer] project team prepare user documentation and training | [Customer] |  |  |  |
| End user training | [Customer] |  |  |  |
| Data migration if required | Synantix |  |  |  |
| Create production and test  | Synantix |  |  |  |
| Readiness review | [Customer]/Synantix |  |  | Go-live Checklist |
| **Sign Off go-live readiness** | [Customer] |  |  | Go-Live sign-off form |
| **Stage 5 – Go live** | **Who** | **Start** | **End** | **Related Documents** |
| Execute cut-over plan | Synantix |  |  | Cut-Over Plan Doc |
| Review plan for open issues | Synantix/[Customer] |  |  |  |
| Go-live support | Synantix |  |  |  |
| Post Go-live Review | Synantix/[Customer] |  |  |  |
| **Support handover** | Synantix |  |  |  |