

# Kingdee Way Implementation Methodology

## 金蝶实施方法论简介

### - Brief Introduction

Phases/ Milestones	Activities	Deliverables
Project Launch	Project overall/general scope definition and contracting	Project scope and contract
	Project organization, mutual responsibilities, coordination and communication mechanism definition	Plan of approach
	Project scheduling	Implementation schedule
	Software installation	Installed software
Blueprint	Standard product training	Training report
	Requirement study and functional scope definition	General workflow and functional requirement description
	Conference room piloting / System simulation and testing	Detailed workflow and tailored user manual documentation

	Transaction forms layouts and management reports definition	Reports Request Form, Form Layouts
	Customization planning and definition	Customization Specification Agreements, Customization Development and Implementation Planning
Blueprint realization	Customization development and testing	Customization confirmation
	Transaction form layout and management report development	Form layout and customized report confirmation
	Functional/end user training	Functional training report
	System administrator training	Administrative training report
	Master data coding, preparation/migration	Master data report
Go-live	System parameter setting	System parameter report
	User access authority definition and setting	User authority report
	Opening balance	Opening balance report
	Final checking and testing for go-live	Go live approval report
	Go live	Live run report
	Project review and acceptance	Acceptance report
	Handover to maintenance	

- Detailed Description

Phase	Activities	In Charge	Man-days
1. Project Launch			
	<b>110 Discuss Project Organization &amp; Plan of Approach</b> <b>Tasks:</b> <ul style="list-style-type: none"> <li>Forming Client and Kingdee project organization, Nominating project team,</li> <li>Discussing Plan of Approach: Defining project organization, describing the structure of project organization; defining roles, tasks and responsibilities, mutual communication schemes; Defining project scope and boundaries, Specifying the main project activities and deliverables, project risk analysis.</li> </ul> <b>Documents / Templates:</b> Consultancy Confirmation, Visit Report, Service Sheet, Progress Report, Plan of Approach		
	<b>120 Site Survey</b> <b>Tasks:</b> <ul style="list-style-type: none"> <li>Studying the processes to be supported by the software</li> <li>Proposing implementation project strategy and implementation schedule</li> </ul> <b>Documents / Templates:</b> Site Survey Questions, Site Survey Report,		
	<b>130 Project Plan and Schedule</b> <b>Tasks:</b> <ul style="list-style-type: none"> <li>Formulating and discussing project schedule (Detailed phases, activities, allocation of resources, assignment of responsibilities)</li> </ul> <b>Documents / Templates:</b> Implementation Schedule		
	<b>140 Kickoff Meeting</b> <b>Tasks:</b> <ul style="list-style-type: none"> <li>Outline project objectives and strategies, Introducing implementation methodology and schedule, Illustrating project risks, commonly occurring problems and pitfalls, reviewing key factors for success</li> </ul> <b>Documents / Templates:</b> Kickoff meeting PPT		
	<b>150 Software Installation</b>		

	<p><b>Tasks:</b></p> <ul style="list-style-type: none"> <li>■ Finalizing hardware preparation</li> <li>■ Training client systems administrator on software installation</li> <li>■ Installation of Kingdee K/3 system at client site</li> <li>■ Installation check and preliminary set-up of the software with the standard demo file</li> </ul> <p><b>Documents / Templates:</b> Installation guideline and checklist</p>		
	<b>Deliverables</b>	<p><b>Site Survey Report</b></p> <p><b>Plan of Approach</b></p> <p><b>Implementation Schedule</b></p> <p><b>Installed Software</b></p> <p><b>Kickoff Meeting</b></p> <p><b>Training System Installation</b></p>	
<b>2. Blueprint</b>			
	<b>210</b>	<b>Product Training/Orientation</b>	
	<p><b>Tasks:</b></p> <ul style="list-style-type: none"> <li>■ Standard product training,</li> </ul> <p><b>Documents / Templates:</b> Standard module training material</p>		
	<b>220</b>	<b>Requirement Study / General Workflow</b>	

<p><b>Tasks:</b></p> <ul style="list-style-type: none"> <li>■ Studying current status of the organization, including organizational structure, functional procedures and methods, forms and reports, master data etc.</li> <li>■ For those current processes covered by K/3 system functions: discussing future working method on function level, steps to be performed through the system to support company processes.</li> <li>■ For those current processes not covered by K/3 system functions: analyzing the justification of the idiosyncratic requirements, either suggesting client to reengineer current processes to fit K/3 imperatives, or resorting to customization.</li> <li>■ Documenting general workflow</li> <li>■ Documenting customization requirement</li> </ul> <p><b>Documents / Templates:</b> General Workflow Documentation (UML format), Customization Requirement Report</p>			
<b>230</b>	<b>Conference Room Pilot</b>		
<p><b>Tasks:</b></p> <ul style="list-style-type: none"> <li>■ Simulation: Simulating functional business processes supported by the system to verify and optimize the workflow defined in the blueprint phase. Checking and testing the whole structure of procedures.</li> <li>■ Blueprint revision and optimization: Based on this test, adjustments may need to be made in the procedures or work-instructions.</li> </ul> <p><b>Documents / Templates:</b> General Workflow Adjustments</p>			
<b>240</b>	<b>Documenting Detailed Procedures / User Manual</b>		
<p><b>Tasks:</b></p> <ul style="list-style-type: none"> <li>■ Documenting detailed functional working procedures and K/3 system operating instructions</li> </ul> <p><b>Documents / Templates:</b> Detailed Procedures / User Manual</p>			
<b>250</b>	<b>Customization Planning</b>		
<p><b>Tasks:</b></p> <ul style="list-style-type: none"> <li>■ A separate plan for customization, specifying realization approaches, budgets and schedules</li> </ul> <p><b>Documents / Templates:</b> <b>Customization Specification Agreements, Customization Development and Implementation Planning</b></p>			
<b>260</b>	<b>Defining Operational and Management Reports, Transaction Form Layouts</b>		

	<p><b>Tasks:</b></p> <ul style="list-style-type: none"> <li>■ Defining the operational and management reports</li> <li>■ Defining transaction form layouts</li> <li>■ Planning customization report development schedule and budgets</li> </ul> <p><b>Documents / Templates:</b> Reports Request Form, Form Layouts, Report Development Schedule</p>		
	<p><b>Deliverables</b></p>	<p><b>Training Confirmation</b></p> <p><b>General Workflow</b></p> <p><b>Detailed Procedures</b></p> <p><b>Customization Specifications, Development and Implementation Planning Standard Production</b></p> <p><b>Operational and Management Reports Definition</b></p>	
<b>3. Blueprint Realization</b>			
	<b>310</b>	<b>Customization development and testing</b>	
	<p><b>Task:</b></p> <ul style="list-style-type: none"> <li>■ Customization development and testing</li> </ul> <p><b>Documents / Templates:</b> Customization confirmation</p>		
	<b>320</b>	<b>Transaction form layout and management report development</b>	
	<p><b>Task:</b></p> <ul style="list-style-type: none"> <li>■ Transaction form layout and management report development</li> </ul> <p><b>Documents / Templates:</b> Form layout and customized report confirmation</p>		
	<b>330</b>	<b>Data Migration / Conversion</b>	

<b>Tasks:</b>			
<ul style="list-style-type: none"> <li>■ Discussing on data migrations details, including what and WHAT master data, HOW MANY PERIOD transaction data, data format, technical approach for conversion</li> <li>■ Execute a test-conversion in order to determine what will be converted, how much time is involved and what actions are needed in order to prepare and execute the live conversion.</li> <li>■ Set up a separate detailed activity plan for the preparation, execution and checking of the conversion.</li> <li>■ Live conversion: the delivery and preparation of the files and tables, the placement of the migrated data into the Kingdee database</li> </ul>			
<b>Documents / Templates:</b> Data Conversion Planning, Data Conversion Confirmation			
<b>340</b>	<b>Master Data Coding and Preparation</b>		
<b>Tasks:</b>			
<ul style="list-style-type: none"> <li>■ Training clients on master coding instructions</li> <li>■ Designing master data coding scheme</li> <li>■ Preparing master data dictionary</li> <li>■ Entering master data</li> <li>■ Checking master data completeness and accuracy</li> </ul>			
<b>Documents / Templates:</b> Master Data Coding scheme, Master Data Dictionary, Enterprise Master Data			
<b>350</b>	<b>End User Training</b>		
<b>Tasks:</b>			
<ul style="list-style-type: none"> <li>■ Train the end users the new workflow through a short and intense training course</li> </ul>			
<b>Documents / Templates:</b> Trainer Attendance Report, Detailed Procedures / User Manual			
<b>Deliverables</b>	<b>Data Conversion Planning</b> <b>Master Data Coding Scheme and Master Data Dictionary</b> <b>Master Data Completeness and Accuracy Confirmation</b> <b>End User Training Report</b>		
<b>4. Go-live Preparation and live run</b>			
<b>410</b>	<b>Parameter Setting</b>		

	<b>Tasks:</b> <ul style="list-style-type: none"> <li>Deciding and setting system parameters</li> </ul> <b>Documents / Templates:</b> System Parameters Setting Sheet		
420	<b>System Administration and Initialization Training</b>		
	<b>Tasks:</b> <ul style="list-style-type: none"> <li>System administration training</li> <li>System initialization training</li> </ul> <b>Documents / Templates:</b> Standard Training Material		
430	<b>System Initialization</b>		
	<b>Tasks:</b> <ul style="list-style-type: none"> <li>Defining and configuring users rights and security</li> <li>Detailing opening balance</li> <li>Preparing, collecting and entering opening balance</li> <li>Deciding on changeover date</li> <li>Final Check of opening balance</li> <li>System go live</li> </ul> <b>Documents / Templates:</b> User Authorities Definition Sheet, Opening Balance Sheet		
440	<b>Live Run</b>		
	<b>Tasks:</b> <ul style="list-style-type: none"> <li>Live run onsite support</li> <li>Problems identification, resolution and procedures revision</li> </ul> <b>Documents / Templates:</b> Detailed Procedures Revision		
	<b>Deliverables</b>	<b>System Parameter Setting Sheet</b> <b>System Initialization and Administration Training Confirmation</b> <b>System Initialization Confirmation</b> <b>System Live Run Confirmation</b>	
450	<b>Project Review and Acceptance</b>		

<b>Tasks:</b>	
<ul style="list-style-type: none"> <li>■ Checking and evaluating system running status on all modules and aspects, collecting and checking system reports</li> <li>■ Writing project review report and project acceptance report</li> </ul>	
<b>Documents / Templates:</b> Project Documents Collection, Project Review Report, Project Acceptance Report	
<b>460</b>	<b>Handover to Maintenance</b>
<b>Tasks:</b>	
<ul style="list-style-type: none"> <li>■ Implementation project closure</li> <li>■ Introduction maintenance support</li> <li>■ Project handover to maintenance support department</li> </ul>	
<b>Deliverables</b>	<b>Project Review Report</b> <b>Project Documents (all phases) Collection</b> <b>Project Acceptance Report</b>