PROJECT MANAGEMENT METHODOLOGY
FOR
CSOFT PRODUCT IMPLEMENTATION

Prepared by
Bryan Krenzin
Csoft Corporation
6980 Santa Teresa Ave., Suite 240
San Jose, CA 95119

Phone 408-578-2302
Fax 408-578-2945
support@csoftcorp.net
www.csoftcorp.net

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1.0 PROJECT EVENTS

In order to complete projects in a professional manner, Csoft employs a project management framework that includes the following key milestones and events for the customization and installation of its Software.

Proposal	A document resulting from Csoft personnel's dialogue with the Customer that sets out the commercial terms of the project, provides a description of the components that make up the deliverables, and provides costs and options available to the customer.
Purchase Order	The Customer places an order after the proposal has been accepted. A Project Manager is assigned within Csoft who is responsible for managing all aspects of the project through to system delivery. Once a Purchase Order has been received, any changes must be formally notified through a change control procedure aimed at controlling costs and preventing misinterpretations.
Requirements and Design	The Customer's requirements are written out in a specification document and Csoft software components are mapped to the requirements. If any items that were not in the original proposal are added at this time an addendum to the proposal will have to be approved.
Development, Customization and Configuration	The customer's requirements are configured into the mTrak engine and any custom objects are created.
Delivery	The System is delivered or installed as appropriate to its size, complexity, and requirements in accordance with the provisions agreed upon during the Proposal stage.
Acceptance	Subsequent to system delivery by Csoft the Customer should perform whatever tests they deem necessary to prove that the application functions to the agreed specification in the full environment. This process should be completed within 3 weeks (or agreed upon time) of delivery so that any discrepancies can be rectified.
Support	Continuing support of hardware and software is provided by a Csoft per the support plan that is negotiated.

2.0 PROFESSIONAL SERVICES

The most critical difference between successful and unsuccessful bar code installations is how the technology is applied to a particular work environment. Csoft's Product Support Group is positioned to install your system rapidly and train you staff in how to get the most out of your investment. The vast amount of materials management, enterprise development, and bar code data collection experience we bring to the table will ensure that your CSOFT solution performs as designed and is up and running quickly.

The Csoft Professional Services consist of the following offerings and are included in the Budgetary Analysis:

System Design Survey	A detailed survey of your specific application will take place using a combination of telephone conversations and/or on-site visits. Issues discussed during this survey will include: • megaWare™ Configuration Requirements • megaWare™ Module Requirements • Required field names, types, lengths, etc. for the host database and portable programs • Required reports—report layout and data content • Bar code label specifications and/or bar code label design • Import/Export file formats • Host computer hardware requirements • Portable data terminal (PDT) program flow • Implementation schedule
Csoft System Customization and Configuration	Once the design phase has been completed, Csoft's software will be tailored to match your needs. This may include custom reports and label formats, if specified.
Software Installation and End-User Training	A Csoft Systems Integration Specialist will go on-site and perform the following functions: • Testing of all hardware supplied by Csoft • Csoft Software installation and system testing • End-User software and hardware training
System Support	Csoft has a central support organization. Our central organization will quickly identify and route any customer problems to the proper individual(s) at Csoft for problem resolution. The first year of the annual Software Support Agreement is included in the final price of the system. This entitles a designated user from your company to utilize a hotline number for system support and problem resolution after the initial thirty (30) day warranty period. Annual Support Agreements for subsequent years are available at a rate of 15% of current software investment at start date if a custom project or as outlined in the support section below. Enhancements and version releases are made available to Csoft customers who contract for annual support.

3.0 CSOFT SYSTEM DEVELOPMENT METHODOLOGY

Purpose	This section is intended to introduce the Systems Development Methodology (SDM) Guide, how and why it was created, as well as provides a high level overview of Csoft Systems Development Methodology.
Why the SDM Guide was developed	The introduction of a development methodology providing standards and common frameworks for Csoft is a major step towards achieving solid project control. With that in mind, the Systems Development Methodology (SDM) guide has been developed as a means of communicating and implementing these standards. The SDM is tailored to meet each client's specific needs, so not all items apply to every project
How to Use the SDM Guide	This guide has been organized such that can be used as a quick reference manual, not as a source for detailed information on SDM. This guide is intended to be used as: • A high level outline of Csoft Systems Development Methodology (SDM) phases, major deliverables and milestones • A general guide for setting up a specific framework for each client. • An introduction to the terminology used in the Systems Development Methodology • A quick reference

High Level Overview

What is the SDM	Systems Development Methodology (SDM) is a set of guidelines that will provide: • Guidance throughout the software development life cycle • Support for project planning and administration • Predictability and repeatability of processes over a number of software projects • Quality
SDM Phases	SDM consists of seven phases ranging from the initial planning of a project through its implementation and evaluation. Table 1-1 presents a high level overview of these phases and defines each in terms of: • Purpose • Major deliverables • Major milestones
Post Implementation Review	The Post Implementation Review occurs three to six months after system implementation as a quality review of the end product delivered. The purpose of this review is to evaluate whether the system had delivered a total solution to the business problem. If the solution was not fully met, an Enhancement Service Request could be generated through the use of a new project number.

Table 1-1
SDM Phases: High Level Overview

Phase Name	Description	Major Deliverable(s)	Major Milestone(s)
Phase 1: Project Planning and Control	How will the project be executed and managed? This is when the Project Lead lays the foundation and the path for the project.	• Project Charter • Risk Assessment • Project Plan • Responsibility Matrix • Project Notebook • Phase 1 Acceptance Criteria	♦ Approved Charter ♦ Approved Project Plan ♦ Project Kickoff
Phase 2: Requirements Definition	What is the problem? The problem is stated from the customer's perspective. The required features of the system are described.	• Requirements Definition Document • Logical Data Model • Logical Process Model • Current system assessment • Phase 2 Acceptance Criteria	♦ Documented Requirements ♦ Requirements Sign-off
Phase 3: Functional Design	What is the solution? The solution is provided in terms of business functions that the system provides to satisfy the stated requirements.	• Functional Specifications Document. • Prototype • Training Requirements • Data Conversion Specification. • Phase 3 Acceptance Criteria	♦ Functional Specifications Sign-off ♦ Acceptance Criteria Sign-off ♦ Conversion Specifications Sign-off
Phase 4: Infrastructure Design and Procurement	What infrastructure is best suited to support the solution? In this phase, the infrastructure to support the installation is defined and purchased.	• Server Specifications • Access Points • Site Survey • Mobile Computer Selection • Scanner Selection • Printer Selection • 3rd Party Software • Phase 4 Acceptance Criteria	♦ Technical Design Sign-off ♦ Hardware Purchases ♦ 3rd Party Software Purchases
Phase 5: Configuration and Coding	How is the solution constructed? This is when the actual construction of the solution takes place.	• System Configuration • Data Conversion • Custom Coding • Test Environments • Test Plans: ∗ String ∗ System ∗ Acceptance • Phase 5 Acceptance Criteria	♦ Configuration Acceptance ♦ Code Walkthroughs ♦ Modules Migrated to Test Environment. ♦ Test Plan Sign-off

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Table 1-1: SDM Phases Overview, Continued

Phase Name	Description	Major Deliverable(s)	Major Milestone(s)
Phase 6: Testing	Did the system deliver the required solution? This phase validates that the solution developed met the stated objectives.	• Unit Test Results • String Test Results • System Test Results • User Manuals • Finalized System Documentation • Tested System • Debug Configuration • Phase 6 Acceptance Criteria	♦ (Unit) Tested Modules/ Database & Files. ♦ System Test Environment Established ♦ Users Manuals Delivered ♦ System Test Results Sign-off
Phase 7: Implementation	Can the customer use the solution? The customer base accepts the solution delivered.	• User Training • User Acceptance Test Results • Production System • Production Data • Operations Manuals • Problem Escalation Process & Support • Change Control Procedures • Project Post Mortem • Phase 7 Acceptance Criteria	♦ Trained Customers ♦ Acceptance Test Results Sign-off ♦ System Documents Handed Off ♦ Help Line Established ♦ Production Support Established ♦ SLA Sign-off