

























**Synergy Business Solutions, Inc.**  
Example Implementation Project Plan

ID		WBS	Task Name
0			<b>Sample Project Plan</b>
1		<b>1XXX</b>	<b>PLANNING</b>
2		<b>1100</b>	<b>Planning</b>
3			<b>Implementation Setup</b>
4			<b>Client Team</b>
5			Signed Work Order to Proceed
6			Project Charter Worksheet
7			Network - Preinstallation Worksheet
8			<b>Synergy Team</b>
9			Project Setup
10			Communication and contact information
11			<b>Project Charter (Define Scope In Writing)</b>
12			Completed from worksheet
13			Submitted for approval
14			Approve
15			<b>Project Plan (Detail Project Plan and Timing)</b>
16			Draft
17			Updated
18			<b>Other Project Planning Activites</b>
19	 		Kickoff Meeting Team Members
20	 		SynergyPCentral Web Site Setup
21			Setup Status Review Meeting
22		<b>2XXX</b>	<b>NETWORK AND SOFTWARE INSTALL</b>
23		<b>2000</b>	General Matters/Preparation
24		2100	Microsoft Software
25		<b>2700</b>	Install SharePoint technologies
26		<b>2900</b>	Fixed Assets
27		2990	Other Applications
28		<b>2999?</b>	<b>Validation of Network and Software Installation</b>
29			Validate all software is installed and o/s items resolved/flagged for follow-up
30			Validate all network documentation is complete and uploaded
31		<b>3XXX</b>	<b>CONCEPTUAL DESIGN DOCUMENTS</b>
32		<b>3000</b>	<b>General System</b>
33			Key, critical process defined and sign-off
34			Security setups




















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ID		WBS	Task Name
35			Shared Information
36		<b>3100</b>	<b>Financials</b>
37			Multi-Company (Multiple databases?)
38			Chart of Accounts
39			Subaccounts
40			Flexkey Definitions
41			Financial Statements
42			Financial Budgeting
43			Accounting for Currency Transactions
44			Accounting For Financial Statement Translation
45			Accounting For Intercompany Transactions
46		<b>3199??</b>	<b>Validation of Financial Conceptual Design</b>
47			Validate all Conceptual Designs are accounted for
48			Validate Conceptual Designs are signed and uploaded to Shared Doc'mts
49		<b>3200</b>	<b>Project Controller</b>
50			Project Types and Setup
51			Project Work Breakdown Structure
52			Allocation Methods
53			Rate Tables
54			Project Budgeting
55			Accounting For Direct Labor
56			Accounting For Indirect Labor
57			Accounting for Indirect Costs
58			Accounting for Material Costs
59			Accounting for Subcontract Costs
60			Accounting for Travel Expenses
61			Accounting for Reimbursable Costs
62		<b>3299?</b>	<b>Validation of Project Costs Items</b>
63			Validate that all project costs have been accounted for
64			Validate that all Sign Off documents have been uploaded to Shared Doc'mts
65			Accounting For Revenue - T&M
66			Accounting for Revenue - Cost Plus
67			Accounting For Revenue - Fixed Fee
68		<b>3299?</b>	<b>Validation of Project Revenue Items</b>
69			Validate that all project revenues have been accounted for
















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ID		WBS	Task Name
70			Validate that all Sign Off documents have been uploaded to Shared Doc'mts
71		<b>3400</b>	<b>Materials Management</b>
72			<b>Procurement</b>
73			Requisitions Management
74			Purchase Order Management
75			Inventory Management
76			<b>Validation of Procurement Items</b>
77			Validate that all procurement components have been accounted for
78			Validate that all Sign Off documents have been uploaded to Shared Doc'mts
79		<b>3600</b>	<b>Payroll</b>
80			Define payroll integration (if applicable)
81			Accounting For Payroll
82			Accounting for Direct Deposit
83			Accounting for Benefits
84		<b>3700</b>	<b>Portal/SharePoint</b>
85			Business Portal
86		<b>3800</b>	<b>Reporting</b>
87			Financial Statements
88			FRx Security
89			<b>Validation of Reporting Items</b>
90			Validate that all reporting components have been accounted for
91			Validate that all Sign Off documents have been uploaded to Shared Doc'mts
92		<b>3900</b>	<b>Fixed Assets</b>
93			Fixed Asset Templates
94			Fixed Asset Additions
95		<b>4XXX</b>	<b>CONFIGURATION LIVE SYSTEM</b>
96		<b>4000</b>	<b>General System</b>
97			Setup Standard Security and Access Rights
98			Approve General System Setup
99		<b>4100</b>	<b>Financials</b>
100			Setup Multi-Company
101			Setup General Ledger
102			Setup Accounts Receivable
103			Setup Accounts Payable
104			Setup Cash Manager


















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ID		WBS	Task Name
105			Setup Currency Manager
106			Setup Financial Translation
107			Setup Configure FRx Statements (1BS and 1 IS)
108			Approve Financial Setups
109		<b>4200</b>	<b>Projects</b>
110			Setup Project Controller
111			Setup Allocator Module
112			Setup Time and Expense Module
113			Setup Flexible Billing
114			Setup Billing Rules
115			Setup Invoice Format (Single Format Only)
116			Approve Project Setups
117		<b>4400</b>	<b>Materials Management</b>
118			<b>Procurement</b>
119			Set up Requisitions Module
120			Set up Purchase Order
121			Set up Inventory
122			Approve Procurement Setups
123		<b>4600</b>	<b>Payroll</b>
124			Setup GL Update Process
125			Setup basic payroll
126			Setup advanced payroll options
127			Approve Payroll Setups
128		<b>4700</b>	<b>Portals</b>
129			Business Portal Configuration
130			Approve Business Portal Configuration
131		<b>4800</b>	<b>Financial Statements</b>
132			Setup FRx Balance Sheet
133			Setup FRx Income Statement
134			Setup FRx Security
135			Approve FRx Statement Setup
136		<b>4900</b>	<b>Fixed Assets</b>
137			Setup Fixed Asset Templates
138			Setup Fixed Asset Setup
139			Approve Fixed Assets Setup
























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ID		WBS	Task Name
140		4999??	<b>System Configuration Review - Synergy</b>
141			<b>General Setups</b>
142			Setup screens
143			<b>Master record schemas\setup</b>
144			Chart of Accounts
145			Subaccounts
146			Account Categories
147			Customers
148			Vendors
149			Inventory Items
150			Projects
151			Rate Table
152			Allocation Methods
153			<b>Configuration document</b>
154			Approve Configuration
155		5XXX	<b>PROCESS DOCUMENTS AND TESTING</b>
156		5000	<b>General System and Planning</b>
157			Develop Testing Plan from key, critical processes
158			Monthly Close Calendar
159		5100	<b>Financials</b>
160			Multi-Company Accounting
161			Foreign Currency Accounting
162			Financial Statement Translation
163		5200	<b>Projects</b>
164			Project Setup
165			Time and Material
166			Fixed Price
167			Cost Plus Fee
168			Internal Projects
169		5600	<b>Payroll</b>
170			Employee Setup
171			Timecard Processing
172			Payroll Calculations and Check Processing
173			ACH Processing
174			Payroll Journal Entries


















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ID		WBS	Task Name
175			Payroll Taxes
176		<b>5700</b>	<b>Portal/SharePoint</b>
177			Timecard
178			Expense Reports
179			Requisitions
180		<b>5800</b>	<b>Reporting</b>
181			Balance Sheet
182			Income Statement
183		<b>5900</b>	<b>Fixed Assets</b>
184			Fixed Asset Additions
185			Fixed Asset Disposals
186			Fixed Asset Detail Reports
187		<b>5999??</b>	<b>Process Documentation\Testing Review</b>
188			<b>Documentation Review</b>
189			Financial
190			Projects\Allocator\Flexible Billing
191			Other
192			Monthly Calendar Updated
193			Approval to proceed
194			<b>Testing Review</b>
195			Review testing plan for completeness
196			Review outstanding issues for resolution
197			Approval to proceed
198		<b>6XXX</b>	<b>TRAINING</b>
199		<b>6000</b>	<b>General System</b>
200			<b>Planning</b>
201			Develop Training Plan
202			<b>Classroom</b>
203			System Administration
204			Customization Manager
205			Crystal Reports
206			<b>Custom</b>
207			Mutli Company Accounting
208		<b>6100</b>	<b>Financials</b>
209			<b>Classroom (Web Based Training Free)</b>












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ID		WBS	Task Name
210			General Ledger
211			Accounts Payable
212			Accounts Receivable
213			Cash Manager
214			<b>Custom</b>
215			Currency Manager
216			Financial Statement Translation
217		<b>6200</b>	<b>Projects</b>
218			<b>Custom</b>
219			Project Controller
220			Allocator
221			Time and Expense for Projects
222			Flexible Billing
223			Analyzer
224			Project Budgeting
225			Contract Manager
226		<b>6400</b>	<b>Materials Management</b>
227			<b>Classroom (Web Based Training)</b>
228			Inventory
229			Purchase Order
230			Requisitions
231			<b>Custom</b>
232			None
233		<b>6600</b>	<b>Payroll</b>
234			<b>Classroom</b>
235			Payroll
236			<b>Custom</b>
237			Payroll
238		<b>6700</b>	<b>Portal/SharePoint</b>
239			<b>Classroom</b>
240			System Adminsitration
241			User
242			<b>Custom</b>
243			None
244		<b>6800</b>	<b>Reporting</b>

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ID		WBS	Task Name
245			<b>Classroom</b>
246			Frx Beginning
247			FRx Advanced
248			<b>Custom</b>
249			None
250		<b>6900</b>	<b>Fixed Assets</b>
251			<b>Classroom</b>
252			None
253			<b>Custom</b>
254			Fixed Asset
255		<b>6999?</b>	<b>Training Assessment</b>
256			Assess training and go-live readiness
257		<b>7XXX</b>	<b>CONVERSION</b>
258		<b>7000</b>	<b>Planning</b>
259			<b>Preliminary</b>
260			Preliminary Conversion Plan
261			Provide Transaction Import Files
262			<b>Final</b>
263			Final Conversion Plan
264		<b>7100</b>	<b>Financials</b>
265			<b>Preliminary</b>
266			<b>General Ledger</b>
267			General Ledger Transactions
268			<b>Accounts Payable</b>
269			Vendors
270			Open Accounts Payable
271			<b>Accounts Receivable</b>
272			Customers
273			Open Accounts Receivable
274			<b>Cash Manager</b>
275			Bank Reconciliations
276			<b>Final</b>
277			<b>General Ledger</b>
278			General Ledger Transactions
279			<b>Accounts Payable</b>

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ID		WBS	Task Name
280			Vendors
281			Open Accounts Payable
282			<b>Accounts Receivable</b>
283			Customers
284			Open Accounts Receivable
285		<b>7200</b>	<b>Projects</b>
286			<b>Preliminary</b>
287			Project Master File
288			Project Beginning Balance
289			Flexible Billing Billed-to-date
290			<b>Final</b>
291			Project Master File
292			Project Beginning Balance
293			Flexible Billing Billed-to-date