



Unit: Implementation Tools

Topic: Implementation Methodology

1.1. Create a new project plan based on a template

Choose *Administration* → *System Initialization* → *Implementation Center* → *Implementation Project*.

In the **Plan** tab, select the *Detailed Project Plan* template from the dropdown list.

Choose the *Duplicate Template* icon to create a copy of the Detailed Project Plan.

Enter **Light & Music** as the name and provide a description.

Choose OK.

Select the task called “Project Handover” and remove it from the plan by choosing the *Remove Step* icon (minus sign). If you choose a task that has child entries, you are given the option to remove the child entries as well as the task.

Select a task row and add a new task by choosing the *Add Step* icon (+ sign).

Add a task called “**Learn the implementation tasks**”.

Choose the up and down arrows to move this task up to the start of the plan.

1.2. Add a link to a configuration screen

Select the row for the new task and right-mouse click to open the context menu.

Choose *Add Link*.

In the *Menu Selection Form*, navigate to *Administration* → *System Initialization* → *Implementation Center* → *Implementation Tasks*.

Choose OK.

Test the link. The *Implementation Tasks* window will open. You can close this window.

Choose **Update** to save your changes to the new plan.

1.3. Record progress in the plan

In the **Plan** tab, choose Level 1 to see the high level tasks (phases).

Enter a value of 4 hours in the Planned Time column for the new task.

Switch to the **Progress** tab and choose the drill-down arrow in the Actual Duration column for the new task.

In the Time Record window, enter today’s date, the current time as the Start Time, and the current time + 2 hours as the End Time.

If the *Owner* column is not visible, use *Form Settings* to make this field visible and active.

Select an owner from the list. If there is no employee master data, choose New to create an employee record for yourself. Enter your own name as the employee name, then choose **Add**.

Select the employee name and choose **Update**.

The **Progress** column will show the actual progress based on the planned time.

Save your changes to the plan.
