



# Performance Budgeting

## Project Q4 PMP Report

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# **1 Introduction**

## **1.1 Purpose**

The purpose of this document is to review the Performance Budgeting (PB) Project Management Plan (PMP) and each of its component documents, as well as to identify activities that occurred during Quarter 4, May 1, 2010 and June 30, 2010, of the project.

Now that the PB Configuration Management Plan is approved, this document will include all of the changes made to Non-Project Management Plan Document Control Items as identified in the PB Configuration Management Plan since each Control Item was approved by COVA and baselined.

## **1.2 Organization**

This document is intended as a summary for the Commonwealth of Virginia (COVA) Project Manager. It is organized into a section for each document with the following subsections in each:

- Activities Related to the Plan
- Content Changes to the Plan

## **2 PB Project Management Plan**

### **2.1 Activities Related to the Plan**

- Specific activities related to the PB Project Management Plan are included in the supporting plan summaries in this document.

### **2.2 Content Changes to the Plan**

- Change will be made to Phase 2 dates after Phase 1 Go-Live.

### **3 PB Project Budget Plan**

#### **3.1 Activities Related to the Plan**

The following deliverables were accepted by COVA during Q4:

- PB System and Integration Test Cases
- PB User Docs – Decision Packages and GA Changes
- PB Training Module – System Overview
- PB Management Hosting Environment – Sept 2009 – May 2010
- PB Test Scripts – System and Integration
- PB Unit Test Results
- PB Project Q3 PMP Report
- PB Project Q3 Summary Report
- PB Performance Test Plan
- PB User Docs – Budget Execution
- PB User Docs – Base Budget
- Entered monthly project status reports into ProSight

#### **3.2 Content Changes to the Plan**

- Updated WBS

## **4 PB Project Communication Plan**

### **4.1 Activities Related to the Plan**

- Communiqué created and distributed to DPB staff in June
- Steering Committee presentations
- PB Project Management Team meeting presentations
- Agency Out-Reach meeting and webinar – Training and UAT completed
- Meeting minutes for Steering Committee and PB Project Management Team created and distributed
- Action item logs for Steering Committee and PB Project Management Team created
- PB Project Repository updated regularly
- Risk, Issue, and Change Management logs updated regularly
- Entered monthly project status reports into ProSight

### **4.2 Content Changes to the Plan**

- None since COVA approval

## **5 PB Project Performance Management Plan**

### **5.1 Activities Related to the Plan**

- None since COVA approval

### **5.2 Content Changes to the Plan**

- None since COVA approval

## **6 PB Project Procurement Plan**

### **6.1 Activities Related to the Plan**

- Received User Acceptance Testing Environment from VITA/NG.
- Received Production Environment from VITA/NG.
- Procured office supplies and Polycomm.

### **6.2 Content Changes to the Plan**

- None since COVA approval

## **7 PB Project Quality Plan**

### **7.1 Activities Related to the Plan**

- Created PB Project Q4 PMP and Q4 Quarterly Summary Report.
- Produced Biweekly Status Reports and presented in PB Project Management Team meetings.
- Conducted inspections (i.e., peer reviews and tech edit) of each deliverable prior to delivery to the client.
- Agency out-reach meeting and webinar – Training and UAT completed.
- Project team members attended a system demo session of PB System capabilities.
- Action items created and assigned.
- Meeting minutes created and available on the PB Project Repository.

### **7.2 Content Changes to the Plan**

- None since COVA approval

## **8 PB Project Resource Management Plan**

### **8.1 Activities Related to the Plan**

- Jr. BIDS Specialist, Greg Smith, rolled off the project.

### **8.2 Content Changes to the Plan**

- None since COVA approval

## **9 PB Project Risk and Issue Management Plan**

### **9.1 Activities Related to the Plan**

- Created a new risk related to changes the new administration could make that would impact the project.
- Reranked the project risks based on ongoing changes to the project.
- Presented updated risks to Steering Committee and PB Project Management Team.

### **9.2 Content Changes to the Plan**

- None since COVA approval

## **10 PB Project Schedule Management Plan**

### **10.1 Activities Related to the Plan**

- Updated WBS approved by COVA.
- Schedule progress and deliverables reviewed in weekly internal PPC team meetings.
- Schedule progress and deliverables shared with PB Project Management Team during Biweekly Team Meetings.
- Schedule progress and deliverables shared with the PB Project Steering Committee.

### **10.2 Content Changes to the Plan**

- None since COVA approval

## **11 PB Project Scope and Change Management Plan**

### **11.1 Activities Related to the Plan**

- Work Breakdown Structure (WBS) reviewed, updated, and approved by COVA
- 61 Change Requests to affect the PB System created and moving through the process
- Change Requests to reflect documentation changes created and moving through the process (see Table 1 and Table 2 below)

### **11.2 Content Changes to the Plan**

- None since COVA approval

## **12 PB Fit/Gap Plan**

### **12.1 Activities Related to the Plan**

- The Fit/Gap Analysis established a baseline for project scope as part of the development of the detailed project plan. The Fit/Gap Analysis built upon the analysis was performed as part of the In-Depth Demonstrations conducted during the Proposal Evaluation process and further refined the scope definition in order to appropriately assign resources and schedule project work. Results of the In-Depth Demonstrations and Fit/Gap Analysis were documented using the Requirements Traceability Matrix (RTM) and Requirements Traceability Matrix for Design.

### **12.2 Content Changes to the Plan**

- None since COVA approval

## **13 Requirements Traceability Matrix and Requirements Traceability Matrix for Design**

### **13.1 Activities Related to the Plan**

- Documented the results of the In-Depth Demonstrations and Fit/Gap Analysis

### **13.2 Content Changes to the Plan**

- None since COVA approval

## **14 PB Data Conversion and Migration Plan**

### **14.1 Activities Related to the Plan**

- Identified the logistical steps required to convert and/or migrate data from selected legacy systems into the new Performance Budgeting (PB) System for Phase I of the project. Discussed only those systems being replaced by the new PB System and the source data systems being affected.
- Detailed assumptions and prerequisites for the conversion along with a summary of all the impacted external source systems, conversion schedule, mitigation plans, and high-level procedures and techniques that will be followed.

### **14.2 Content Changes to the Plan**

- None since COVA approval

## **15 Preliminary and Final PB Data Conversion and Migration Design**

### **15.1 Activities Related to the Plan**

- Discussed the design for migrating and converting data from older existing systems (“source systems”) into the new PB System (“target system”).

### **15.2 Content Changes to the Plan**

- None since Q3 COVA review and approval

## **16 PB Coding Structure and Data Standards Document**

### **16.1 Activities Related to the Plan**

- Defined the overall VITA Performance Budgeting Project Coding Structure and Data Standards and covered design and implementation activities in four major areas: (1) custom code development, (2) database development, (3) report development, and (4) BIDS development.

### **16.2 Content Changes to the Plan**

- None since Q3 COVA review and approval

## **17 PB Abbreviations and Glossary**

### **17.1 Activities Related to the Plan**

- Defined the abbreviations used for coding and project management documents for the Performance Budgeting (“PB”) Project.

### **17.2 Content Changes to the Plan**

- None since COVA review (this was not a billable deliverable)

## **18 Preliminary and Final PB External System Interfaces Design Document**

### **18.1 Activities Related to the Plan**

- Identified the technical design whereby data from external systems is brought into the new PB System. Identified the data needs of the new PB System vis-à-vis the external systems, the technologies employed, the databases required to support interface operations (to include data models), the logical system architecture, the physical system architecture, the service designs, and the process flow.

### **18.2 Content Changes to the Plan**

- None since Q3 COVA review and approval

## **19 Preliminary and Final PB Application Design Document and Addendum**

### **19.1 Activities Related to the Plan**

- Identified the application design that will be used for the Phase I deliverable.

### **19.2 Content Changes to the Plan**

- Changes to PB Final Application Design are in process.

## **20 Preliminary and Final PB Report Design and Specifications Document**

### **20.1 Activities Related to the Plan**

- Identified the design and specifications of the 24 reports that will be produced as part of Phase I of the PB System.

### **20.2 Content Changes to the Plan**

- None since Q3 COVA review and approval

## **21 PB Database Design Document**

### **21.1 Activities Related to the Plan**

- Identified the overall design adopted for the new PB System.

### **21.2 Content Changes to the Plan**

- None since Q3 COVA review and approval

## 22 PB Security Plan

### 22.1 Activities Related to the Plan

- Identified how users will be validated in accessing the system and what roles and permissions will be assigned.

### 22.2 Content Changes to the Plan

Content Changes are part of CR#64065. The changes are reflected in

- Table 1 below:

Table 1 – Content Changes to PB Security Plan

Change/Version Number	Date of Change	Impacted Section/Description of Change	Person Entering Change
1.1	04/21/2010	<ol style="list-style-type: none"> <li>Updated <b>Error! Reference source not found.</b> Removed the Logi Info Reporting Component.</li> <li>Replaced the PBInterface.[pbw] schema with the PBApp.[dbo] schema for the PBReportWriter service account.</li> <li>Added the PBReporting.[...], PBApp.[...] and PBInterface.[pbw] schemas to the PBAdHocWriter in the pbreader role.</li> <li>Added PBApp.[...] schema to the PBReportWriter service account in the db_owner role.</li> </ol>	A. Lewandowski

## **23 PB Organizational Change Management Plan**

### **23.1 Activities Related to the Plan**

- Identified how PPC and COVA will assist nearly 600 Commonwealth of Virginia (COVA) employees in preparing for the organizational, business, and operational changes that will occur with the implementation of the new Performance Budgeting (PB) System

### **23.2 Content Changes to the Plan**

- None since COVA approval

## **24 PB Integrated Training Plan**

### **24.1 Activities Related to the Plan**

- Identified the strategies, course curriculum, and high-level schedule for training stakeholders, project team members, system users, and system support personnel on the new PB System.

### **24.2 Content Changes to the Plan**

- None since COVA approval

## **25 PB Test Plan**

### **25.1 Activities Related to the Plan**

- Identified the test plan approach and high-level test methodology, scope, and logistics to validate the implementation of each component of the PB System.

### **25.2 Content Changes to the Plan**

- None since COVA approval; still need to finalize changes to approach and baseline.

## 26 PB Data Conversion and Migration SSIS Packages Document

### 26.1 Activities Related to the Plan

- Identified SQL Server Integration Services (SSIS) packages which, together with associated database utility scripts, have been developed to migrate data from legacy data systems scheduled to be replaced by the new PB System.

### 26.2 Content Changes to the Plan

- Content Changes are part of CR64068. The changes are reflected in Table 2 below:

**Table 2 – Content Changes PB Data Conversion & Migration SSIS Packages Document**

Change/Version Number	Date of Change	Impacted Section/Description of Change	Person Entering Change
1.1	05/19/2010	Breaking up PBReporting packages CapSix data flow tasks because encounter deadlocks while doing testing.	Lisa Li

## **27 PB Performance and Capacity Planning Approach Document**

### **27.1 Activities Related to the Plan**

- Identified the approach for performance testing and capacity planning that is both systematic and practical.

### **27.2 Content Changes to the Plan**

- None since COVA approval

## **28 PB Configuration Management Plan**

### **28.1 Activities Related to the Plan**

- Identified the definition and controls for the PB System configuration items (CI). Listed all existing CIs for the project, how they are managed, and the process for adding a new item.

### **28.2 Content Changes to the Plan**

- None since COVA approval

## **29 PB Performance Test Plan**

### **29.1 Activities Related to the Plan**

When the new Performance Budgeting System (PB System) goes live on August 15, 2010, it will be the central budgeting application for the Department of Planning and Budget (DPB) and several agencies. It is expected that different user populations, performing different specialized budget tasks, will make use of the PB System throughout the fiscal year and that usage spikes will occur just before task completion cutoff dates. Some of these tasks will be CPU, memory, and database intensive.

This document discusses the performance test plan, giving a high-level description of the following facets:

1. The performance criteria as specified in the project requirements.
2. The Team Foundation Server (TFS) Test Load Agent 2008 test tool and test rig architecture.
3. The test plan, which includes a discussion of the environments, schedule, and test methodology.

### **29.2 Content Changes to the Plan**

- Approved by COVA on June 21; incorporating comments recommended by COVA,