



Performance Budgeting

Project Q6 PMP Report

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Commonwealth of Virginia
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Prepared by:

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Record of Changes/Version History

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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 6, October 1, 2010 and December 31, 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. The only over-arching activity related to this plan is Go-Live was achieved.

2.2 Content Changes to the Plan

- Phase 2 Planning is finalized. Changes were made to Section D, Item 6, the Critical Milestone Summary. This summary was updated to reflect the major milestones and dates for Phase 2.

3 PB Project Budget Plan

3.1 Activities Related to the Plan

The following deliverables were accepted by COVA during Q6:

- PB Project Q5 PMP Report.
- PB Project Q5 Summary Report.
- PB CR (Enhancement Bundle 1) – Exhibit D-7 (partial approval)
- PB Exhibit D-9 (i.e. Change Requests).
- PB Training Module – Base Budget.
- PB Training Module – Base Budget Adjustment.
- PB Training Module – Budget Reduction Strategies.
- PB Training Module – Capital Budget Request & Maintenance Reserve.
- APA Access.
- PB Management Environment – October and November.
- VITA Outage.
- PB Release Management Plan.
- PB User Documentation – Reporting.
- PB User Documentation – Base Budget Adjustments.
- PB Go-Live Plan.
- TFS License Transfer.
- PB Publication Scoping Deliverable.
- Phase 2 – PB Project and Deliverable Schedule.
- Phase 2 – PB Project Management Plan Updates.
- Entered monthly project status reports into ProSight.

3.2 Content Changes to the Plan

- Phase 2 Planning is finalized. Changes were made to Section D, Schedule. This schedule was updated to reflect the major milestones and dates for Phase 2.

4 PB Project Communication Plan

4.1 Activities Related to the Plan

- Steering Committee presentations.
- PB Project Management Team meeting presentations.
- Agency Out-Reach Meeting and Webinar for Phase 2 kick-off.
- Daily Help Desk calls.
- 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

- IV&V completed by NorthHighland.
- Budget Document Development completed by Finite Matters.
- Strategic Planning Process Improvement recommendations completed and presented by Zelos.
- Procured office supplies.

6.2 Content Changes to the Plan

- Phase 2 Planning is finalized. Changes were made to Section D, Schedule. This schedule was updated to reflect the major milestones and dates for Phase 2.

7 PB Project Quality Plan

7.1 Activities Related to the Plan

- Created PB Project Q6 PMP and Q6 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 meetings and webinars – Phase 2 kick-off.
- 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

- Phase 2 of the Project has started and roles of each member of the Project Team has changed to reflect the needs for Phase 2
- Training Lead, Bernie Hill, rolled-off of the project

8.2 Content Changes to the Plan

- Phase 2 Planning is finalized. Changes were made to Section D; an Organizational Breakdown Structure was added to reflect Phase 2 staffing. Changes were made to Section F to reflect staff assignments for Phase 2. Changes were made to Section G to reflect the percentage of time allocation per month for each resource on Phase 2.

9 PB Project Risk and Issue Management Plan

9.1 Activities Related to the Plan

- Created a new risk: 67457 regarding the impact of the delay of Load Testing.
- 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

- Baselined updated schedule for Phase 2.
- 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

- Change Requests to affect the PB System created and under review
- 2 CRs (Exhibits D-7 and D-9) approved and implemented

11.2 Content Changes to the Plan

- None since COVA approval

12 PB Fit/Gap Plan

12.1 Activities Related to the Plan

- None since COVA approval.

12.2 Content Changes to the Plan

- None since COVA approval

13 Requirements Traceability Matrix and Requirements Traceability Matrix for Design for Phase 1

13.1 Activities Related to the Plan

- None since COVA approval.

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

- Performed 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

- Performed 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

- Utilized 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

- Utilized 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

- Refined 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 Q5 approval

19 Preliminary and Final PB Application Design Document and Addendum

19.1 Activities Related to the Plan

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

19.2 Content Changes to the Plan

- None since initial approval.

20 Preliminary and Final PB Report Design and Specifications Document

20.1 Activities Related to the Plan

- Refined 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

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

21.2 Content Changes to the Plan

- None since Q5 approval.

22 PB Security Plan

22.1 Activities Related to the Plan

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

22.2 Content Changes to the Plan

- None Since Q3 COVA Review and approval.

23 PB Organizational Change Management Plan

23.1 Activities Related to the Plan

- Performed 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

- Performed 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. Completed and posted course curriculum to KnowledgeCenter.

24.2 Content Changes to the Plan

- None since COVA approval.

25 PB Test Plan

25.1 Activities Related to the Plan

- Performed 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.

26 PB Data Conversion and Migration SSIS Packages Document

26.1 Activities Related to the Plan

- Performed 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

- None Since Q3 COVA Review and approval.

27 PB Performance and Capacity Planning Approach Document

27.1 Activities Related to the Plan

- Performed 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

- Performed 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, 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.

Performance Testing is still underway.

29.2 Content Changes to the Plan

- None since Q5 approval

30 PB Help Desk Plan

30.1 Activities Related to the Plan

- The Performance Budgeting (PB) Help Desk Plan defines the services and activities required to coordinate and to respond to Problems and Service Requests made by the PB End-Users and Commonwealth of Virginia (COVA) technical staff. Since we have achieved Phase 1 Go-Live, Help Desk are underway.

30.2 Content Changes to the Plan

- None since COVA approval

31 PB User Documentation and Training

31.1 Activities Related to the Plan

- PB User Documentation and Training is designed to aid the PB System user community in using the new system. We have achieved Phase 1 Go-Live, the User Documentation and Training will is in use.

31.2 Content Changes to the Plan

- All User Documentation and Training modules have been written and accepted by COVA.

32 PB Release Management Plan

32.1 Activities Related to the Plan

- Numerous releases have gone into Production since Go-Live.

32.2 Content Changes to the Plan

- None since COVA approval, but expecting comments from COVA Project Manager on this document

33 PB Disaster Recovery Plan

33.1 Activities Related to the Plan

- None since COVA approval.

33.2 Content Changes to the Plan

- None since COVA approval, but expecting comments from COVA Project Manager on this document