

WebPM

Project Management System

Vision and Scope Document
Version 1.0 (DRAFT)

Prepared for

State Farm Insurance

by

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on

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Problem Statement

Project Background

Business analysts at State Farm Insurance in Bloomington, IL, are required to track and update a myriad of details about past, ongoing, and future projects. From these details, analysts must be able to quickly produce reports describing project costs in terms of dollar amounts and resource utilization. They must manage multiple projects across business cases, and multiple business analysts must share access to the same pool of data.

Currently, project data is tracked by way of maintaining multiple unrelated spreadsheets. This approach works well when the number of managed projects and business cases is small, and when only a single analyst requires access to the data involved. However, it introduces substantial problems when information that is embedded in multiple sources needs to be updated. Redundancy of work results when an analyst is required to make the same changes to multiple documents. Problems also arise when an analyst needs to generate a report that draws on data from multiple sources. Maintaining project data in such a distributed manner is error prone and inefficient.

State Farm Insurance has decided that a centralized mechanism for project management is required to enable multiple business analysts to concurrently maintain project data and generate reports. Therefore, the goal of this project is *to provide a centralized project management system in the form of a web-based application, specifically designed for use by business analysts at State Farm Insurance.*

Customer Needs

Business Analyst, State Farm Insurance

Business Analysts represent the primary users of the software. Business Analysts are required to track the status of multiple projects across business cases, and generate reports. They will benefit from WebPM in the following ways:

- They will be able to maintain (add, delete, update, search) business case, project, and resource information from a single location;
- They will be able to generate, view, print, export, and save reports in PDF and XLS format;
- Their data will be managed by a SQL database which provides secure and efficient access for multiple users.

Risks

One risk that this project faces is the potential of producing a final product that does not meet the customer's requirements. The source of this risk is a lack of communication between the project team and stakeholders. This risk may be mitigated by frequent and communication between the project team and stakeholders.

Assumptions and Dependencies

The following is a list of assumptions that have been made by the project team during the development of this document:

1. Because this project will span two semesters, we assume that the same project team members will be available and committed to the development of this software during the entire course of this project.
2. The data elements and report formats will not change.

Vision Statement

The finished WebPM product will be a web-based project management system that provides access to a centralized repository of project data. It will enable business analysts to add, delete, update, and search information about business cases, projects, and resources. WebPM will be able to generate reports from stored project data including project *road-maps* and *work initiation plans*. WebPM will have the ability to generate these reports in Microsoft Excel (XLS) and Postscript (PDF) formats. WebPM will manage concurrent access to project data, and will be able to restrict application access to authorized users only.

Major Features

Major features of WebPM include the following:

- Ability to generate project road-map reports (shared services and detailed views)
- Ability to generate project work initiation plan
- Ability to generate resource utilization reports
- Ability to generate all reports in Microsoft Excel (XLS) or Postscript (PDF) format
- Ability to restrict application access to authorized users
- Ability to timeout application after 30 minutes of inactivity

Reports

Shared Services Project Road-map

The shared service project road-map provides a chronological view of all managed projects across business cases. This report enables the analyst to view the status of all projects by year (quarter). In this report, projects are:

- Active
- On deck
- Potential
- On radar
- Completed

Detailed Project Road-map

The Detailed Project Road-map report provides a tabular view of managed projects organized by business case. It include the following information:

- Year of activation
- Start date
- Close date
- Sponsor/project POC information
- Original hourly estimates
- Comments

Work Initiation Plan

The Work Initiation Plan is a report that describes the status of all managed projects, across all business cases. The WIP provides a more detailed tabular view of managed projects than the Project Road-map. The Work Initial Plan has the following fields:

- Project status
- Business case
- Release number
- Release name
- Start date
- End date
- Estimated hours
- WIC Coordinator/WIA Contact
- System Sponsor
- Sponsoring Component
- Project Manager
- Comments

Resource Report

Management needs the ability to track resources and their workloads across multiple projects. This report indicates resource dispersion across all of the projects with which the resource is associated.

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