

LEAD Project Review

Fiscal and Oversight Committee

February 6, 2018

Prepared by Das Nobel

Executive Project Dashboard

Category	Prev Week	Current Week	Comments
Overall Project Assessment			<p>DN 2/2: Final UAT feedback session concluded on 1/31/2018. The dev team is resolving remaining few issues and plan for regression test on 2/7. Major dev effort is shifted to the data migration activities.</p> <p>Phase 2 Visit Mode redesign is available for the business to go through UAT activities starting on 2/5 with the expectation that all testing and sign off will be completed by 2/16.</p>
Schedule			DN 2/2: No issues
Budget			DN 2/2: No issues
Scope			DN 2/2: No issues. BRC forms to exclude notarization for LEAD phase 3 go live.
Resources			DN 2/2: No issues Licensing SME transition plan needs more clarity.
Risk			DN 2/2: Data migration and system integrations are being monitored and anticipate risks before they become issues. Business unit to return feedback on the open transactions from the regional offices.

Legend	Description
	On track for completion on or before planned completion date, no issues.
	Behind schedule or risk of falling behind. Date will be missed unless issues are resolved quickly. Budget at risk of going over budget. Expectations need management or resetting.
	Project at risk of stoppage, major delays, budgetary constraints. Executive decisions must be made to mitigate.

Phase 3 Schedule - REVISED

Key Dates	Key Milestones	Notes
1/31/2018	Last day for final feedback from UAT testers	
2/1/2018 to 2/7/2018	System stabilization	
2/7/2018 to 2/14/2018	Regression testing	
2/16/2018 to 3/2/2018	Training - Part I	ECC staff and Provider training sessions
3/5/2018 to 3/9/2018	Make up days or remote training/checkpoints	
3/17/2018 to 3/20/2018	Production deployment and sanity test	System will NOT be accessible by providers or licensors
3/21/2018	Go Live	
3/22/2018 to 4/27/2018	Support and Checkpoints	
4/9/2018 to 5/29/2018	Training - Part II	Specific dates are TBD

Revised training schedule is available [\[link\]](#)

Detail project plan in Google sheet [\[link\]](#).

Data Migration Activities

Bucket 1 - Closed Transactions	Bucket 2 - Open Transactions	Bucket 3 - 30K Programs	Bucket 4 - Compliance and Non-Compliance Visit Data
<p>In Progress</p> <ul style="list-style-type: none"> Validate data mapping (dev) <p>Queue</p> <ul style="list-style-type: none"> Validate data mapping (business) Load data in sandbox Validate data in sandbox <p>Completed</p> <ul style="list-style-type: none"> Draft data mapping from Licensing Manager to LEAD 	<p>In Progress</p> <ul style="list-style-type: none"> Validate data mapping (dev) Validata sample data in staging sandbox (dev) <p>Queue</p> <ul style="list-style-type: none"> Validate data mapping (business) Load data in sandbox Validate data in sandbox <p>Completed</p> <ul style="list-style-type: none"> Load sample data in sandbox Draft data mapping from Licensing Manager to LEAD 	<p>In Progress</p> <ul style="list-style-type: none"> Draft data mapping from Licensing Manager to LEAD Analyze 30K programs <p>Queue</p> <ul style="list-style-type: none"> Validate data mapping (business) Load data in sandbox Validate data in sandbox <p>Completed</p> <ul style="list-style-type: none"> 	<p>In Progress</p> <ul style="list-style-type: none"> Validate data mapping (dev) <p>Queue</p> <ul style="list-style-type: none"> Validate data mapping (business) Load data in sandbox Validate data in sandbox <p>Completed</p> <ul style="list-style-type: none"> Draft data mapping

Note: Compliance and Non-Compliance data dating back to 1/1/2007. We already have Non-Compliance data dating back to 7/1/2010.

Phase 3 - UAT Readiness to Production Go Live Deliverables

	Milestones	Stage	Status	Comments	Est. Complete Date	Actual Complete Date	Vendor Lead	EOE/EEC Lead
1	Phase 3 dev issues	100%	Complete	DN 11/24: 404/407 defects are closed. We need to complete regression test for these issues in addition to the remaining issues.	11/24	11/24	Harshit	Das
2	UAT Readiness	100%	Complete	DN 12/1: Kicked off UAT on 11/27	11/24	11/27	Harshit	Das
3	UAT Support	99%	In Progress	DN 2/2: Resolve remaining handful of issues to close out this milestone.	12/31 1/31		Harshit	Das
4	Training Support - Part I	0%	Not Started	DN 1/19: Updated schedule is available. Communication strategy is in progress.	2/9 3/9		Harshit, Pete	Das
5	Data Migration	55%	In Progress	DN 2/2: Parallel workstream across all 4 buckets.	2/28		Harshit	Das

6	Production Deployment	0%	Not Started		2/14		Harshit	Das
7	Production Go Live Support	0%	Not Started		2/15		Harshit	Das
8	Training Support - Part II	0%	Not Started	DN 1/5: Schedule to be finalized	3/20		Pete	Lynne
9	Architecture Changes	95%	In Progress	DN 1/5: Incremental progress with architecture changes. Please see this list . One item is remaining from the Phase 3 release list items.	12/31		Harshit	Das
10	Data Dictionary Activities 90% Target Completion by 11/27 100% Target Completion by 12/31	99%	In Progress	DN 12/29: Solid coverage and we will keep this open until end of UAT.	12/31 1/31		Gaurang	Das
11	Decommission Systems	25%	In Progress	DN 1/19: Damjan to send updated request for further analysis.	2/14		Das	Jennifer

Note: N/A

OPEN Issues / Risks

#	Description	Priority	Status	Mitigation Plan
1	Software quality	High	Open	<p>DN 10/13: Our observation of phase 2 and phase 3 software quality is poor. Several things are contributing to this:</p> <ul style="list-style-type: none"> • Resource changes within Incapsulate team over the past few months • Beginner level expertise within the Salesforce platform demonstrates blatant infraction with design decision [qdoc] • Lack of process control - inability to lock down requirements, build and get proper sign off from business <p>DN 11/24: A number of architecture changes are made to improve quality. Additional work is remaining for continuous improvement over the next few months.</p> <p>DN 12/4: We tackled a few items that needed immediate attention to improve quality. There is a significant technical debt that we inherited that requires a short term and a long term strategy. By end of Dec 2017, we will be able to put together a roadmap for post phase 3 changes.</p> <p>DN 12/29: Visit mode and corrective action review pages will be redesigned to minimize user frustration. Wireframes will be presented on 1/2/2018 for the business unit to review.</p> <p>DN 1/19: Phase 2 Visit mode is approved for development and is in progress with the dev team.</p>
2	Data migration: profiling and data cleansing	High	Open	<p>DN 11/13: Expectation is to bring to additional licensing activities data. Potential risk of going back too far where the data quality may degrade. Proper data profiling activities are being taken to address this potential risk.</p> <p>DN 1/12: Great progress with the data mapping and analyzing the open transactions data.</p>
3	System integration and downstream impact	High	Open	<p>DN 11/13: To avoid hiccups after phase 3 go live, the team is going to push data from LEAD to Licensing Manager 2010. Possible challenges around creating new providers data and handling business rules within the data level.</p>
4	LEAD AWS Account	High	Open	<p>DN 12/1: Incapsulate may have used their own contracted AWS account and we are working with them to transfer the account to EOE.</p> <p>DN 12/29: We have full access to the account and will need to figure out how the renewal process will be handled from procurement perspective.</p>

5	SME Transition is unclear	High	Open	DN 1/12: The core project team is requesting clarity over the transition plan for the SME. The team can significantly benefit especially within the R&P program area.
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RESOLVED Issues / Risks

#	Description	Priority	Status	Proposed Solution
1	Updated BRC forms are pending	High	Closed	DN 1/2: Remaining BRC forms are pending that is contributing to the delay in schedule. These forms are critical for the licensing business processes and we are not able to work around it. DN 1/12: Felicia updated that the BRC documents are completed; however, she will review them early this week before sharing with the dev team.

Note: Removed resolved items as of 1/12

Key Decisions

#	Date	Topic	Description	Approver
1	11/09/17	Consent form and notarization activities within LEAD. Wet signature is not needed for notarization.	<ol style="list-style-type: none"> Can we accept scanned copy of the notarized form or does EEC need a hard original copy with wet signature ? If we need Wet signature what are the reasons ? Yes, we can accept a scanned copy of the notarized consent form. When do we need to go live with the Notarized signature process ? I recommend that we go live as soon as possible because we are presently not in compliance with this requirement. 	Felicia
2	11/17/17	EEC Review - Due Diligence	Transaction due diligence list is introduced as part of the application review. The licensing team is preparing the complete list and help prepare a matrix by transaction types/forms.	Donna, Lynne, Das

3	12/28/17	Extend UAT schedule for further feedback for phase 3	The licensing team and the project team collectively decided to extend the UAT stage for another iteration of feedback and resolution. The team will utilize some of the existing training sessions for the feedback process by Jan 19, 2018 and resolve all high priority issues by Jan 31, 2018.	Donna, Das
4	1/19/18	Open transactions from Licensing Manager to be migrated and processed in LEAD	Approximately 2,500 open transactions are identified to be migrated to LEAD and process with a simplified approach. In addition, legacy transactions will NOT be visible to the LEAD portal users. The overall number may be reduced upon regional offices feedback.	Donna, Lynne, Gaurang, Das
5	TBD	Determine cut off date for the licensing managers data especially open transaction	Pending decision--	TBD