**Instituto Superior Técnico**

**DM4iRetail – 3ª Entrega – 20 de Novembro de 2015**

**Turno: 5ª 17h30 – Prof. Alberto Silva**

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**Introduction**

GPIGrupo2 is a spinoff from Instituto Superior Técnico specialized in deploying Document Management Systems.

This Final Proposal…

**Description of the project**

**What?**

From the developer’s side, our corporation, this project is to develop a new information system for the company iRetail, made of the following modules:

* Document management and workflow;
* Invoices approval;
* Purchasing management

The project will also include the management, design and conception of the product, and the phases of deployment and operationalization.

**Why?**

For the client company, iRetail, the purpose is to keep up with its fast growth, which caused problems related to the limitations of paper documents: saturation of the information flows, difficulty of storing documents and lack of control over information including loss.

**Success Factors**

* Requirements shall be clearly defined to avoid wrong or unneeded operations;
* There should be clear and concise means of communication between the two companies;
* The documentation and manuals must be accurate and complete to be useful;
* The training should be effective so it allows K-users and technicians to adapt to the new system and work more efficiently;
* Roles and responsibilities must be clearly defined;
* There should be a common technical language between the team established beforehand by the team leaders;
* The testing (pilot and acceptance) should verify the efficacy of the product and that it complies with the established required functionality;
* The design and architecture of the system should be done with all the required functionality in mind.

**Success Criteria**

* Time
  + The Pilot must not last more than one month;
  + The system should be operational five months after the approval of the project plan, with less than two weeks tolerance;
  + The external supplier shall offer a minimum warranty period of three months;
* Cost
  + Do not exceed the € 400 000 budget for the whole project (excluding network structures and hardware) with a variance of 6%;
* Quality
  + The number of non-conformities during acceptance tests should not be greater than 10%;
  + The time for correction of conformities should be less than 48 hours;
  + The evaluation of the training sessions shouldn't score lower than 3.75, from 0 to 5.

**Expected Benefits**

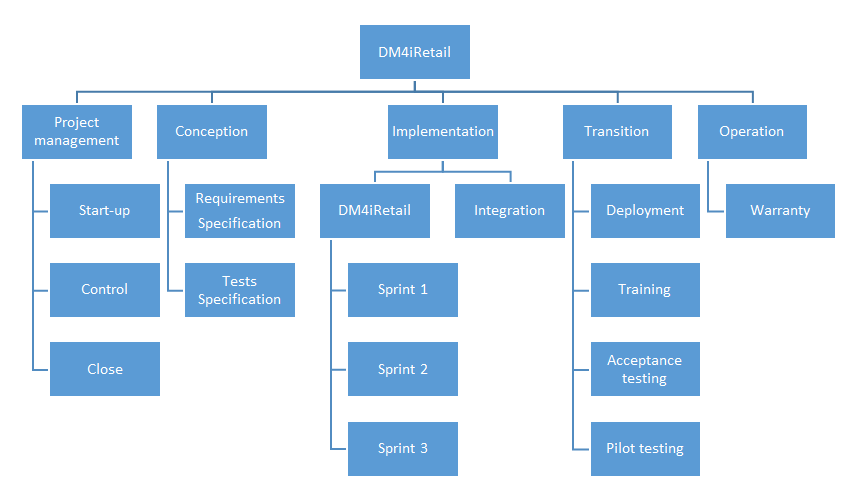
After one year:

* Reduction by 50% of employees’ complaints, considering the expected overall employees satisfaction, ensuring the reimbursement of expenses no later than 5 working days after submission;
* Ensure supplier’s invoices get approved less than 10 working days after reception;
* Based on the previous benefit, allow iRetail to negotiate better discounts from suppliers;
* Allow classification and search of documents, based on content attributes;
* Reduce paper costs and physical space for archiving paper by 50%;
* Reduce administrative and post costs by 20%.

**Total Price**

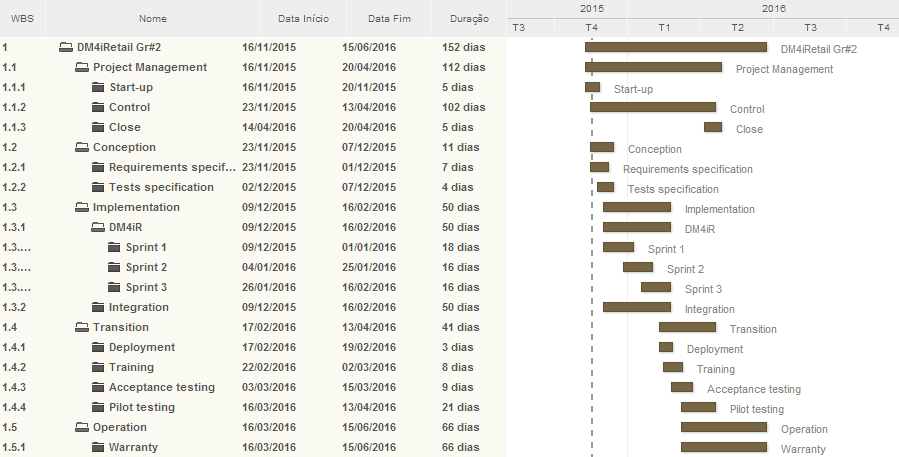
**Total Project Duration**

**Work Breakdown Structure**

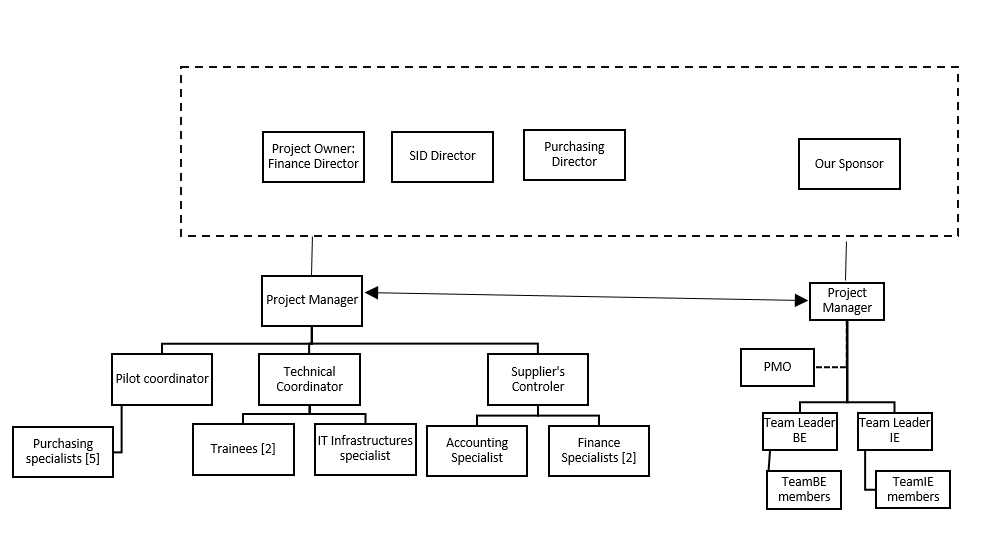


|  |  |  |  |
| --- | --- | --- | --- |
| **Work Package** | **Description** | **Milestones** | **Deliverables** |
| 1.1.1 – Start-up | Definition of the charter, management and team members, and project planning activities | Project plan approved | Project plan |
| 1.1.2 – Control | Project control and replanning to verify compliance with requirements and quality assurance | None | None |
| 1.1.3 – Close | Feedback and closure meetings, and production and delivery of the report | Project finished | Project report |
| 1.2.1 – Requirements Specification | Analysis and specification of requirements | Requirements approved | Requirements specification document |
| 1.2.2 – Tests Specification | Specification of tests | Tests approved | Tests specification document |
| 1.3.1.1 – Sprint 1 | Scrum meetings and implementation of Purchase Module | Sprint 1 complete | Purchase Module and its manuals, documentation, specification document and training materials |
| 1.3.1.2 – Sprint 2 | Scrum meetings and implementation of Invoices Approval module | Sprint 2 complete | Invoices Approval and its manuals, documentation, specification document and training materials |
| 1.3.1.3 – Sprint 3 | Scrum meetings and implementation of Documents Management module | Sprint 3 complete | Documents Management and its manuals, documentation, specification document and training materials |
| 1.3.2 – Integration | Integration of the developed modules with the ERP | Integration finished | None |
| 1.4.1 – Deployment | Deployment of the system including its installation and configuration | Deployment complete | Working information system |
| 1.4.2 – Training | Training of technicians and K-users, and its evaluation. | Training complete | None |
| 1.4.3 – Acceptance Testing | Validation of the information system and correction of non-conformities | Acceptance tests passed | None |
| 1.4.4 – Pilot Testing | Pilot test done before the go-live of the system | Pilot test passed | None |
| 1.5.1 – Warranty | Warranty work provided by the supplier (our company) during the three months | Warranty concluded | None |

**Project Scheduling**



**Organization Breakdown Structure**

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**Responsibility Assignment Matrix**

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | PO:  Finance  Director | SID Director | Purchasing Director | Pilot coord. | Technical Coord. | Supplier Control | PM | Sponsor | PM | Team Leader BE | Team Leader IE |
| Start-up | D | C | C |  |  | A | I | d | XP | C | C |
| Control |  |  |  |  |  | A | I |  | XP |  |  |
| Close | D |  |  |  |  | A | I | d | XP |  |  |
| Requirement Spec. | D |  |  |  |  |  | I | C | P | X |  |
| Test Spec. |  | C | C | A |  |  | I |  | P | X |  |
| Sprint 1 |  |  |  |  |  |  | I |  | P | X |  |
| Sprint 2 |  |  |  |  |  |  | I |  | P | X |  |
| Integration |  | A |  | C | A | T |  |  | P |  | X |
| Deployment |  |  |  |  | A |  | I |  | P | X | C |
| Training |  |  |  |  | X |  |  |  | P | T |  |
| Acceptance | D |  |  |  | X |  | I |  | P | d | d |
| Pilot |  |  |  | X |  | C | P |  | I | A | A |
| Warranty |  |  |  |  |  |  |  |  | I | X |  |

**Communication Plan**

**Communication Flow**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **From** | **To** | **What** | **When** | **How** |
| Project Manager | Finance Director (PO)  Sponsor (Supplier) | Status Report | Every Month  Weekly (test phase) | Email |
| Team Leaders (BE and IE) | Project Manager  (Supplier) | Progress Report | Weekly | Collaborative Tool |
| Team Leaders (BE and IE) | Project Manager(Supplier) | Estimative Report | Weekly | Collaborative Tool |
| Project Manager  (Supplier) | Team Leader BE  Scrum Master | Tasks Specification | Every 2 Weeks | In person |
| Project Manager  (Supplier) | Team Leaders | Planning Documents | Beginning of project | Collaborative Tool |
| Project Manager  (Supplier) | Finance Director  (PO) | Functional Specification document | After requisites revision | Collaborative Tool |
| Project Manager  (Supplier) | Finance Director  (PO) | Technical documentation for each module | After system specification | Collaborative Tool |
| Team Leader BE | Project Manager (Supplier) | Test Specification Document | After approval of tests specification | Collaborative Tool |
| Team Leader BE | Team BE members | Tasks Distribution | Weekly | In Person |
| Team Leader IE  Two Finance Specialists | Project Manager (Supplier) | Integration Report | After System Integration | Email |
| Team Leader BE | Project Manager (Supplier) | Acceptance tests report | After acceptance tests | Collaborative Tool |
| Pilot Coordinator | Project Manager (Supplier) | Pilot Report | After doing Pilot | Email |
| Team Leader BE | Project Manager (supplier)  Finance Director (PO) | User Manual | After acceptance tests | Collaborative Tool |
| Team Leader BE | Project Manager (supplier)  Finance Director (PO) | Installation Manual | After acceptance tests | Collaborative Tool |
| Team Leader BE | Project Manager (supplier)  Finance Director (PO) | Configuration  Manual | After acceptance tests | Collaborative Tool |
| Team Leader BE | Project Manager (supplier)  Finance Director (PO) | Training Materials | After acceptance tests | Collaborative Tool |
| Project Manager  (Supplier) | Finance Director (PO) | DM4iRetail | After acceptance tests | Collaborative Tool |
| Sponsor | Finance Director (PO) | Warranty | After acceptance tests | Email |

**Meetings Plan**

|  |  |  |
| --- | --- | --- |
| Meeting type | Who | When |
| Steering | Finance Director (PO)  Our Sponsor | Monthly |
| Progress | Project Manager (Supplier)  Team Leaders BI and IE | Weekly |
| Kick-off | Finance Director (PO)  Our Sponsor | Beginning of the project |
| Requisites specification approval | Finance Director (PO)  Our Sponsor  Both PM | After requirements gathering |
| Tests specification approval | Project Manager (Supplier)  Finance Specialists  Team Leaders BI and IE | After tests specification |
| Plan specification and tasks attribution | Project Manager (Supplier)  Team Leaders BI and IE | In the start of the dev phase |
| Planning | Team BI  Team BI members | Daily (in every sprint) |
| Revision | Project Manager (Supplier)  Team BI  Team BI members | Weekly (in every sprint) |
| Retrospective | Team BI  Team BI members | By the end of every sprint |
| Dev progress | Project Manager (Supplier)  Team Leaders BI and IE | During dev phase  (every 15days) |
| Acceptance tests approval | Finance Director (PO)  Project Manager (Supplier)  Finance Specialists  Team Leaders IE | After doing acceptance tests |
| Pilot meeting | Finance Director (PO)  Both PM  Finance Specialists | Before the go live of the system |
| Project closing | Finance Director (PO)  Project Manager (Supplier) | After pilot test |

**Project Resources**

The resources of the client company (iRetail) are not represented on our resource table since they are not our company’s employees.

|  |  |  |
| --- | --- | --- |
| **Triskell resource** | **Rate type** | **Description** |
| Project manager | Project Manager | Manager of the project, as stated in the case study |
| BE Team Leader | Middle Consultant | Leader of the BE Team, as stated in the case study |
| IE Team Leader | Middle Consultant | Leader of the IE Team, as stated in the case study |
| Artur José Lourenço Fonseca | Junior Consultant | BE Team member assigned to the Sprints, and Installation of the system during the Deployment. |
| Tiago Miguel Pedro do Nascimento | Junior Consultant | BE Team member assigned to the Sprints, and Configuration of the system during the Deployment. |
| Miguel de Oliveira Martins Melícia Cruz | Junior Consultant | IE Team member assigned to the Integration work.  BE Team member assigned to the Warranty period. |

**Project Quality**

**Quality Assurance Activities**

Carefully made plan for the project, along with control/monitoring and replanning activities to ensure the requirements are met.

Clear specification of requirements to avoid ambiguities and conflict, after a thorough analysis.

Clear specification of the tests for the system.

Use the sprint planning meetings to approach better solutions to the due work.

Adapt the training materials, documentation and manuals to improve the K-user and technician experience.

**Quality Control Activities**

Quality

**Acceptance Criteria**

Quality

**Project Risks**

Risks

**Price and Supplier Conditions**

Conditions

D1 .req for prosal

Invoince . fatures

Payment -30 dias etc

Risk register – tryskell template

D2

Usar resources para fzer evaluation