INSURANCE AGENT PORTAL

IAP - 001

Project Management Plan

**Record of Release**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Version No.** | **Modified By** | **Reviewed By** | | **Authorized By** | **Release Date** | **Modifications Done** |
| 1.0 | Simran Kumari | | Simran Kumari | Jitesh Mishra | 01/08/2020 |  |
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# Introduction

This document describes the practice of software development to be followed by Project managers, Project leaders and Project members. It provides an explicit guidance to project managers and leaders to take the initiative up front to specify software management practices, quality plans, and plans for developers, managers and reporting teamwork. Nevertheless IAP – 001 does not contain any subproject.

# Project Information

|  |  |
| --- | --- |
| Name of the project: | INSURANCE AGENT PORTAL |
| Name of the customer: | Chandravadan Prajapati |
| Project ID: (NMIMS Internal) | IAP - 001 |
| Customer’s Project ID | IAP - 001 |
| Planned start date: | 08-07-2020 |
| Planned end date: | 05-12-2020 [End of Sem-III] |
| Estimated Efforts: (in person-months) | 2.5 |
| Estimated Size (FP / CI / KLOC) | FP: 190; KLOC:975 |
| Warranty period | Up to 1 year after the delivery of software |
| Project Type | Development |
| Billing Type | Fixed price and T&M |
| **Customer Contacts** | |
| Main Contact | Chandravadan Prajapati  Contact No.: 9987011420 |
| Senior Manager | Chandravadan Prajapati  Contact No.: 9987011420 |
| **NMIMS Contacts** | |
| Marketing contact | Name: Kartik Padave  Email ID: kartik.padave39@nmims.edu.in  Contact no.: 123456789 |
| Senior Manager | Name: Jitesh Mishra  Email ID: Jitesh.mishra35@nmims.edu.in  Contact no.: 123456789 |
| Project Manager | Simran Kumari  email ID: Simran.kumari31@nmims.edu.in  Contact no.: 123456789 |
| Project Leader | Simran Kumari  Email ID: Simran.kumari31@nmims.edu.in  Contact no.: 123456789 |
| Onsite Coordinator | Varun Khadayate  Email ID: varun.khadayate28@nmims.edu.in  Contact no.: 123456789 |
| Quality Leader | Shreyash Agrawal  Email ID: [Shreyash.agrawal01@nmims.edu.in](mailto:Shreyash.agrawal01@nmims.edu.in)  Contact no.: 123456789 |
| Configuration Librarian | Kartik Padave |
| Configuration Control Board | Kartik Padave |
| Defect Prevention Group Members | Shreyash Agrawal |

# Project Scope

This system helps clients to manage their customers effectively and efficiently. This Software gives customers an online presence. The software saves agents time to interact with customers for menial tasks by doing it by itself. This software also helps clients to give its customers a luxurious experience by minimizing their work.

## Project objectives

Following are the objectives of the project:

* Developing product Insurance Agent Portal in a short span effectively and efficiently.
* Building a profitable relationship with customers.
* Delivering products efficiently on time and under the budget.

## Critical success factors

Success factors of the project are stated as follows:

* **Customer Management Support**: The coordination with the customer management support shall play a crucial role in the success of the project. Through efficient communication with the customer this shall be kept in check.
* **Clarity of Requirements:** The finalized requirements should be clarified to everyone involved in the project.
* **Minimum Changes:** The project team was trained in coding, testing, and documentation so there shall be minimal changes in the project. However, every documentation should be thoroughly reviewed to avoid changes.
* **Proper Planning:** Proper planning and execution of the plan based on the analysis of requirements and estimation will play a significant role in the success of the project.
* **Training of Staff members:** Training and experience of staff members in their respective domains is one of the key aspects of the success of a project. Nevertheless, staff members in this project are experts in their domains with appropriate skill sets required in this project.
* **Hard Working and focused staff:** A hard-working and focused staff will play a crucial role in the success of a project which was displayed by the team and its members. Appropriate measures are taken by the firm to ensure productivity of the staff.
* **Open Communication:** To make a project work communication shall play a critical role in the project. In this project, the team members are open to each other and hence were able to resolve issues that shall occur in the future. Senior management is taking appropriate measures to maintain open communication between the team as well as with customers.
* **Project Leadership**: Good leadership will play a major role in the success of a project. Managers and project leads involved in the project are well trained and are effective leaders.
* **Team Retention till project completion:** Team Retention affects the success factor of the project that’s why any team member should give at least 1 month prior notice.
* **Expectation management in terms of scope and time:** In the project PL and PM are well trained in this field to maintain team effectiveness.

## Deliverables and Acceptance Criteria

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Phase** | **Deliverables** | **Responsibility** | **Acceptance Criteria** | **Remarks\*** |
| Initial document | Raw initial requirements of customers. | Chandravadan Prajapati | Reviewed and accepted by SM. | The requirements mentioned were acceptable to the team and are achievable. |
| Requirements | Specification of customer requirements. | PM, PL | Review and sign-off from the customer | Requirements were clear and as per customer’s specifications. |
| Design | Software design best suitable for the given requirements. | PM, PL | Review and sign-off from the customer. | Proper design was done as per the specifications mentioned |
| Development | Developed software to the design. | PM, PL | Review and sign-off from the customer. |  |
| Release | Implementation and setup of the tested software. | PM, PL | Review and sign-off from the customer. |  |

The schedules for these deliverables are available in the Project plan.

## Service Level Agreements

## N.A

# PROJECT PROCESS

## Process

**Planning**

|  |  |  |
| --- | --- | --- |
| **Stage** | **Activity/ Input/ Output** | **Responsibility** |
| Entry | Acceptance of proposal and project awarded  Any form of intimation to start a project  Approval to start an internal initiative | SM |
| Tasks | * To make a comprehensive plan of the project which will be the basis for project monitoring. * To draw a plan that will ease project management tasks. | PL,PM |
| Verification | Self-Review & Peer Review, group review, joint review | PM,PL |
| Exit | Start audit is conducted and metrics goals are set  PMP and MPP updated for every phase  OR  1st version of PMP is released | PM |

**Requirement**

|  |  |  |
| --- | --- | --- |
| **Stage** | **Activity/ Input/ Output** | **Responsibility** |
| Entry | Acceptance of contract regarding the project Insurance Agent Portal given by customer. | SM, Marketing |
| Tasks | * Ensuring that requirements for the project are properly defined and understood. * Production a document that covers all the requirements of the customer. | Requirements Team |
| Verification | Self-Review & Peer Review, group review, joint review | PM |
| Exit | Signoff / Approval of Requirements Specification by the customer | PM, Marketing, SM |

**Design**

|  |  |  |
| --- | --- | --- |
| **Stage** | **Activity/ Input/ Output** | **Responsibility** |
| Entry | Acceptance of Estimation documentation. | SM |
| Tasks | Designing software architecture most appropriate for the project requirement. | PL |
| Verification | Self-Review & Peer Review. | PM |
| Exit | Acceptance of the presented design by the customer. | SM,PM |

**Development**

|  |  |  |
| --- | --- | --- |
| **Stage** | **Activity/ Input/ Output** | **Responsibility** |
| Entry | Acception of design for the proposed software. | PM |
| Tasks | Development of software according to the requirements and design within the given estimate of time and cost. | PL |
| Verification | Self-Review & Peer Review | PM |
| Exit | Completion of development with zero bugs. | PM |

**Testing**

|  |  |  |
| --- | --- | --- |
| **Stage** | **Activity/ Input/ Output** | **Responsibility** |
| Entry | Completion of development of the software. | PM |
| Tasks | Testing of the developed software using different stages of testing. | PL |
| Verification | Self-Review & Peer Review, group review. | PM |
| Exit | No bugs are found in the testing phase and acceptance of software by the customer. | PM |

**Release and Implementation**

|  |  |  |
| --- | --- | --- |
| **Stage** | **Activity/ Input/ Output** | **Responsibility** |
| Entry | Clearance of testing phase. | PM |
| Tasks | Implementing the developed software in the real world. | PL |
| Verification | Self-Review & Peer Review, group review. | PM |
| Exit | Acceptance of customers regarding implementation of the software. | PM |

**Maintenance**

|  |  |  |
| --- | --- | --- |
| **Stage** | **Activity/ Input/ Output** | **Responsibility** |
| Entry | Maintenance requirement by customer after release and implementation phase. | PL, PM |
| Tasks | Completion of maintenance task given by customer under discussed guidelines. | PL |
| Verification | Self-Review & Peer Review. | PM |
| Exit | Completion of maintenance requested. | PM |

## Tailored Process

No tailored processes are required for this project.

## Test Plan

Scope:

To provide the developers with bugs and errors in the program. It also provides the customer with compatibility and performance of Insurance Agent Portal in real-world to deal with loads of data and real-time users.

Stages and Types of testing to be followed are:

* Unit Testing
* integrated Testing
* System Testing
* Acceptance Testing

Test coverage:

* Every module of the project goes under different testing phases before delivering it to the client.

Testing Strategy:

* In the event no bugs are found we should move to the next stage.
* If a bug is reported then the testing department should send the module back to the developer.
* If a bug is a major issue then based on the issue it should be added to the issue log and appropriate measures should be taken to resolve it.
* The reports of bugs, test results for every testing stage should be monitored and documented.

# Resource Plan

## Staffing

Staffing details are available in the Resource Register PM-01-05-Resource\_Register.xls document.

## H/W S/W resources

Hardware, software, and tools required for the development and test environment in the project are identified and listed in the resource register: PM-01-05-Resource\_Register.xls

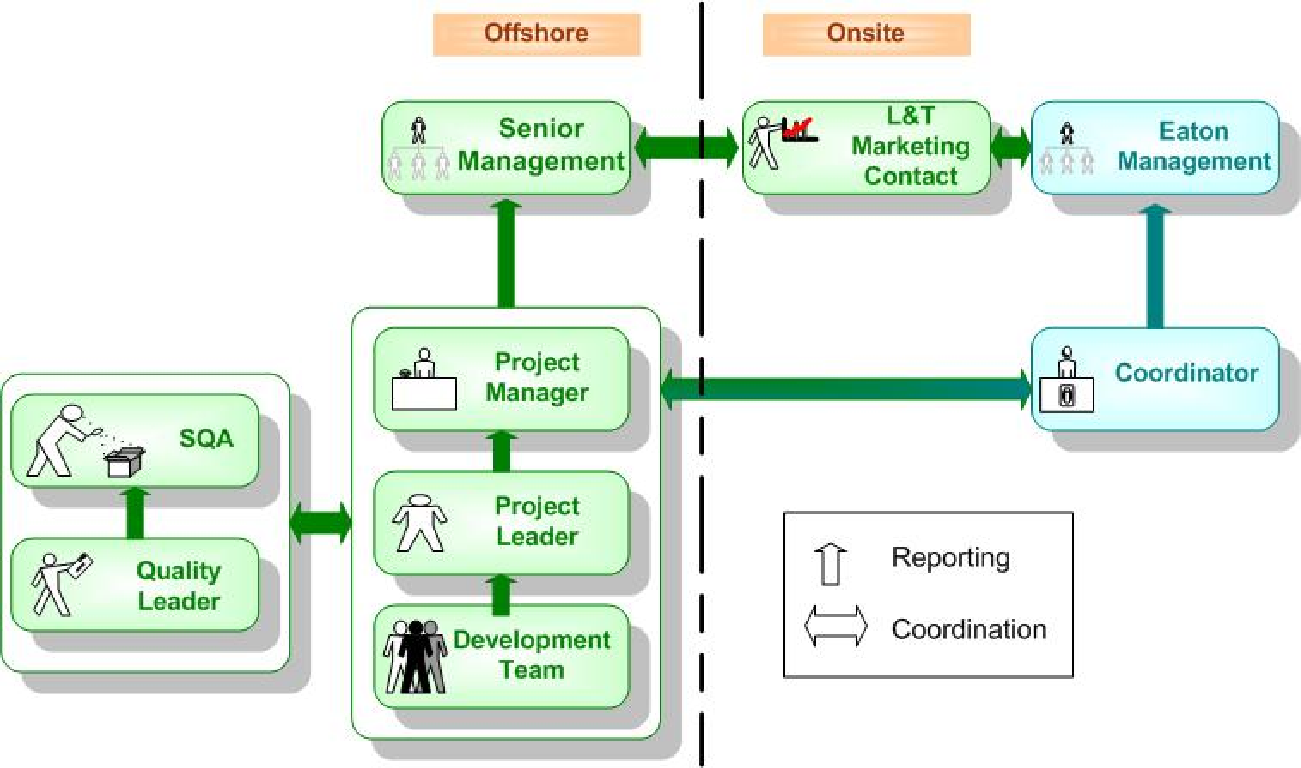
# Project Plan with Milestones

Project Plan and different milestones of the project are mentioned in PM-01-02-WAS.

Refer doc PM-01-02-WAS

# Project Organization

## Team Structure



1. Above given diagram represents structure of the team for project: Insurance Agent Portal
2. The techniques used for communication in the project are:

* Team Communication happens weekly via MS Teams on Friday, Saturday, and Sunday.
* Knowledge sharing is done using documentation of various aspects using MS Word.
* College emails are used for formal communication.
* Refer Doc Contact Details to connect with team members.

## Delegation and Empowerment

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Decision to be Delegated/Empowered** | **Delegated/Empowered By** | **Delegated/Empowered to** | **Delegation/Empowerment Date** | | **Empowerment details** | |
| **Decision making process after empowerment** | **Workforce process impact** |
| **From** | **To** |
| Coding in HTML | PL | Team Member class I | 08-07-20 | 05-12-20 | Shared Responsibility | performance management objectives |
| Coding in CSS | PL | Team Member class II | 08-07-20 | 05-12-20 | Shared Responsibility | performance management objectives |
| Coding in Angular | PL | Team Member class III | 08-07-20 | 05-12-20 | Shared Responsibility | performance management objectives |
| Leave Approval | SM | PM,PL | 08-07-20 | 05-12-20 | Shared Responsibility | performance management objectives |
| Reviewing of documents | PM | PL | 08-07-20 | 05-12-20 | Consensus | Training need |
| Authorization | SM | PM | 08-07-20 | 05-12-20 | Consensus | performance management objectives |

Team Member class I :Excellent HTML coders

Team Member class II :Excellent CSS coders

Team Member class III :Excellent Angular coders

# Monitoring and Controlling Mechanisms

## Frequency of monitoring

|  |  |  |  |
| --- | --- | --- | --- |
| **Sl No** | **Description** | **Frequency** | **Details** |
|  | Senior Management Review (SMR) | Monthly | Review of monthly project progress. |
|  | Status Review Meeting | Weekly – Every Friday, Saturday, and Sunday | Onsite coordinator will be invited every 3rd meeting |
|  | Preparation of MAP | Fortnightly | Or for set of 15 SPR for maintenance projects |
|  | Updating of MPP | Weekly | NA |
|  | Filling-up of timesheet in MPC | Daily | NA |
|  | Tracking of customer SLAs | Weekly | NA |
|  | Status report to customer | Weekly | Communication by Conference |
|  | Tracking RML | Weekly | NA |
|  | Tracking issue log | Weekly | Updating the review log after every stage |

## Issue resolution

For resolution of any issue contact PL. If a specified issue is not resolved in a prescribed timeframe, it will escalate to the next level as defined in the project team structure. The list of issues will be maintained in Issue Log Document.

## Escalation

Threshold periods and details of person to who to be escalated are as follows:

|  |  |
| --- | --- |
| **Threshold period** | **Escalate to** |
| **Issues raised by Prajapati Insurances** | |
| 3 days | Project Leader |
| 7 days | Project Manager |
| **Issues raised by NMIMS** | |
| 3 days | Project Leader |
| 7 days | Project Manager |
| Above 7 days | Senior Manager |
|  | Onsite coordinator |
|  | Front-end marketing |

# Change Management

Changes in the project will be managed according to defined change management process.

All change requests will be logged in “RTT’s CR/PR breakup details Log”.

Configuration Control Board (CCB: Shreyash Agrawal) analyzes the change request to evaluate its impact on the various PDLC phases and other requirements. PM will communicate the impact of change requests to the customer and carryout the actual implementation after acceptance by the customer.

# Quality Plan

## Audit Plan

<Mention the various types of audits that are planned for the project and their frequency along with the responsibilities. >

|  |  |  |
| --- | --- | --- |
| **Audit Type** | **When / frequency** | **Audit by** |
| Start Audit | 9th July-2020 | SQA |
| Work product audit | Before each deliverable | QL  Additional audit by technical experts for design delivery |
| Process audit | Once in a month | QL |
| Configuration audit | Once in a month | QL |
| Additional configuration audit | Once in three months | SQA |
| Closure audit | 10th October-2020 | SQA |

## Metrics Plan

Metrics is used to analyze the actual data on Schedule, Effort & Defects and comparing with Goals. This helps in quantitative control of projects. Metrics goals for projects are defined as MAP.

Data is collected and updated in the same file as per the frequency defined in the PMP.

For MAP refer PM-04-01-MAP\_Dev (1).

## Defect Prevention Plan

Defect prevention (DP) activity involves identifying, analyzing commonly caused defects in projects and taking actions well in advance to prevent them from occurring again.

Defect prevention activity is carried-out throughout the project life cycle. Major defects identified for the project type are entered in the project DP Log. Trend analysis is carried out for the Design, Coding phases and in the project end.

Project DP log is available in \_\_\_\_\_\_\_document.

Project specific approach for defect prevention:

< DP activity specific to the project other than what is mentioned in DP procedure should be documented here >

DP meeting schedules are mentioned in Project plan.

## Review Plan

Review activity for the following items will be carried-out as per review procedure. The work product to be reviewed will undergo self-review process before peer reviews. Review findings will be recorded in Review Log / DTS.

<Give list of system items including documents (like PMP, design document, Test plan etc.) that need to be reviewed. Mention how review is planned, which method of review will be adopted – peer review or intermediate review, or collective review etc., and whether review will be done 100% for critical modules / stringent review for critical modules / technology. Give reference to the project specific review guideline document / Checklist used for review. >

|  |  |  |  |
| --- | --- | --- | --- |
| **Review item** | **Review objective** | **Review type / extent** | **Review guidelines / checklist to be used** |
| PMP | Ensuring successful development of the project's procedures of initiation, planning, execution, regulation, and closure within the set scope, time, quality and budget standards. |  |  |
| Requirement analysis |  |  |  |
| RTT | Ensure that requirements are covered 100% |  |  |
| HLD |  |  |  |
| DLD | GUI standards like earlier product of customer |  |  |
| Code |  |  |  |
| Test plan |  |  |  |
| Unit test cases |  |  |  |
| Integration test cases |  |  |  |
| System test cases |  |  |  |
| Unit Test results |  |  |  |
| Integration test results |  |  |  |
| System test results |  |  |  |
| Release notes |  |  |  |
|  |  |  |  |
|  |  |  |  |

Schedule for review activities are available in Project plan.

# Assumptions, External & Internal Dependencies, Constraints and Exclusions

**Assumption:** NMIMS assumes that the software developed is evaluated by Prajapati Insurances before implementing it in any projects. The developed software is very basic and we also assume that no user training is required for the developed software (IAP-001).

**External dependencies**: Timely feedback from customers for NMIMS queries.

**Internal dependencies:**

* Timely resources like Human resources and mentioned software if not delivered in time then it can create a roadblock in project development.
* There should be a good internet connection or a minimum internet connection of a 2G data.
* There should be a web server with wifi bandwidth of 802.11b, 2.4Ghz, 11 Mbps.
* Database server with basic configuration is maintained for future references.
* As of software , you only need a web browser with stable internet connection.
* The link will be available at the end of the phase.

**Constraints:** The security constraints are as per the guidelines mentioned in National CyberSecurity Act of 2013 and Information Technology Act (2000) as per geographical location shall be followed during the development of the project. Nevertheless no legal constraints are identified till date.

**Exclusions:** No such exclusions are yet identified.

# Risks management plan

Risks are the potential for realization of unwanted negative consequences of events and measured with the probability and severity of adverse effect. Risk management plan serves as a planning and management mechanism in identifying potential problems in advance and proactively focuses on preventing problems and executing mitigation plans for major risks. However if any risk is identified other than the assumed risks it should be added in the risk monitoring log and appropriate action should be taken for neutralizing it.

## Risk Management and Action Plan

Potential risks will be identified during the entire course of the project shall be recorded with impact and probability in the risk-monitoring log. This log will be reviewed and updated frequently with an action plan to neutralize the risk. Action plan for preventive risk responses to mitigate risks will be included in the Project plan.

Project risks are identified and recorded in the risk monitoring log.

# Configuration Management Plan

The objective of Configuration management plan is to establish the methodology for the project’s Configuration Management process. It includes configuration identification, configuration library management, access rights management, version control and change control procedures to be followed in the project.

This plan applies to all documentation and software work products developed during the course of project execution.

## Configuration Identification

|  |  |  |  |
| --- | --- | --- | --- |
| **Sr No** | **Name** | **Controlled/ Controlled & Managed/ Base lined** | **Criteria / event to establish baseline and to revise the baseline** |
|  | Estimation | Controlled and Managed | After review |
|  | PMP | Controlled and Managed | After review |
|  | Requirements Specification document | Controlled and Managed | After review |
|  | Design Specification | Controlled and Managed | After peer review |
|  | Source Code | Controlled and Managed | After Code review |
|  | Test Plans | Controlled and Managed | After Design phase |
|  | Inputs from customer | Controlled and Managed | After customer review of every document |

<Revision of baseline: mention the criteria / event when the baselines would get revised. It can be time triggered or event triggered>

## Document naming & Classification

< Define project specific naming conventions and customer specific naming conventions applicable in the project.

Classify all documents as per IT security guidelines of document classification, as appropriate

Eg: ‘NMIMS General Business ‘

‘NMIMS Internal Use’

‘NMIMS Confidential’

‘NMIMS Proprietary’

>

## Configuration control

< Specify the configuration control method to be followed for different CI. Explain whether the change to impacted items will be done at a predefined interval or after every change is received immediately or after a fixed number of changes are received. Mention how to maintain baseline versions or the CL, where will change histories are maintained (In code or in VSS or combination of the two?)>

## Version control

< Specify

* Tool used for version control
* Events when labeling will be done and conventions for labeling
* The conventions which are going to be followed for writing comments while check in / check out of a Configuration Item (CI) >

## Release mechanism

< Write the mechanism to build and release the deliverable >

## Backup and Archival

|  |  |  |
| --- | --- | --- |
| **Sr No** | **Description** | **Details** |
|  | Backup Frequency | Monthly |
|  | Backup Method | Digital database (CXIAP Bangalore) |
|  | Backup Media | CXIAP Bangalore |
|  | Location of backup | < > |
|  | Availability of backups before recycling | < For 4 weeks> |
|  | Archival mechanism used for soft copies as well as hard copies of all project related documents | < > |
|  | Frequency of archival in Central database. | <Once in 6 months for medium & large projects or at project completion for small projects> |
|  | Location of Archive |  |
|  | Media of archive for soft copies |  |

# Business Continuity Plan

Business Continuity Plan for the project are:

* Backup delivery will include all the deliverables in the original deliverables. Maintenance update of prior 10 days may not be available since it takes upto 10 days for any maintenance update to be uploaded in the backup server.
* Allowable outage time for the project is 1 hour.
* The backup of the software is stored in a Git-Hub account and a backup server in Chennai along with an operation center in Mumbai. Recovery can be done through either site from a remote location.

# Related Documents

Following are the documents referenced in PMP and PMP shall be read in conjunction with these documents.

|  |  |  |
| --- | --- | --- |
| **PMP Sections** | **Document description** | **File Name** |
| 5.1 | Resource Register | PM-01-05-Resource\_Register |
| 12.1 | Risk Monitoring Log | PM-06-01-Risk\_Monitoring\_Log |

# References

* Customer’s documents: Notepad – Insurance Agent Portal