**Salary and Performance Management Application**

**Project Charter**

**IS Author: Team Buffering**

**Business Champion: N/A**

**Date created: October 6th, 2019**

**Last Revised: (date revised after sign-off)**

**Introduction**

***Project Background*** *(history of how this project came about; list limitations of the current process)*

The IS Managers currently use an application that assists them in tracking salary (e.g., salary, compa ratios, projected increase amounts, etc.) for their direct and indirect reports. This application is written in Metaview which is no longer supported therefore needs to be converted to a new application.

The new application will be used by the entire company and will have different features available based on your job title. Since the application is being rewritten, the functionality and use of this new application should be expanded. The new functionality should also include performance management (e.g., projected and actuals for performance review, staff ranking, etc.) and should include salary changes due to employee promotions. The system should be able to distinguish between role promotions and salary promotions. The use of this application should also be expanded to include all managers and supervisor for the entire company. The system should be able to handle employees being switched to different departments and assigning them their new role along with new supervisor/manager.

***Project Definition*** *(general description of what this project is about)*

This project will analyze the requirements for a salary and performance management tool. Once the requirements are defined, an application will be designed, coded, tested and implemented. This system will be used by all Federated managers, supervisors, and top level executives who have supervision responsibilities. The system needs to be flexible to handle yearly changes in guidelines and deviations for salary budget, performance guidelines, and salary ranges.

Performance guidelines will be based according to a merit guidelines scale. Performance reviews will be given at least once a year, with accessibility to adjust projected and actual performance grades. Based on performance reviews, promotions or demotions may be given. Salary promotions may be given at anytime until salary limit is reached regarding current role.

***RACI Framework*** *(list company stakeholders)*

* **Responsible:** Software Developers
* **Accountable:** CEO and Project Manager
* **Consulted:** Managers/Supervisors
* **Informed:** Employees, C Level Executives, Managers/Supervisors

***Project Benefits and Opportunities*** *(list benefits and opportunities of proposed process)*

* Managers and supervisors will have a supported tool that they can use to assist them with the salary planning process.
* Managers and supervisors will have a supported tool that they can use to assist them with the performance management planning process.
* Reduce manual calculation for salary management thus reducing payment/salary errors
* Allow managers and supervisors the ability to track projected and actuals for salary and performance management.
* Ability to better track and report on projected and actuals compared to annual budgets.
* Allow managers to view and report on direct reports and their aligned staff.
* The system will automatically move employees to the appropriate manager and supervisor for employee transfers and promotions.
* The permission for sensitive information would only be available to the staff who requires it.
* Current employees will be able to view their personal information regarding salary, promotions/demotions, and past performance grade reviews.
* The system would make it easier to generate reports about the employees as well as the budget.
* Based on product success, Federated Insurance could consider outside sales distribution.

***Project Risks and Threats*** *(list any potential risks and threats to the project: Project Definition, Project Management, Structure, Project Size, Project Technology, Sponsorship and Commitment, Staffing, any other areas)*

* Intern may not be able to complete the entire project in length of internship.
* Availability of business partners (i.e., IS Directors) may impact progress of project.
* Availability of consultants (i.e., analysis, project management, screen design) may impact progress of project.
* Availability of training may impact progress of project.
* Getting consensus on requirements from the different business areas.
* Stakeholders: The Company
* The system might be too complicated for the beginning users and might require professional training.
* Employees may be dissatisfied with new format/implementation.
* Problems in migrating from the old system to the new one.

***Project Assumptions*** *(list any potential assumptions for the project: Project Definition, Project Management, Structure, Project Size, Project Technology, Sponsorship and Commitment, Staffing, any other areas)*

* The scope of the application will be significantly different than that of the current salary management application.
* A shared database design will be pursued.
* Access to data will be encrypted.
* The company will analyze how competitors differ in payment according to the current merit guidelines in association to performance reviews.
* The company has the necessary resources to complete the development of the new system (Hardware, Software, Tools, etc).
* System will handle up to two years of data.
* Total years of employment will be taken into consideration when analyzing performance reviews.

**Goals and Objectives/Project Scope**

***Project Purpose*** *(this is the overall project mission)*

The purpose of this project is to replace the current salary management application used by the Federated Insurance IS Management with a supported application that will also be implemented for all managers and supervisors at Federated. The system will automatically use the employee’s information to create their salary/hourly based on performance reviews saving managers and supervisors time and minimizing the possibility of manual calculation errors.

***Project Goals and Objectives*** *(specifically what the project will accomplish)*

* Identify and document the requirements for a salary management application.
* Identify and document the requirements for a performance management application.
* Design the database to be associated with the application.
* Design the application to meet the requirements defined.
* Code and test the application.
* Implement a new system by a target date of 12/2/2019.

***Logical Scope*** *(processes, data, and/or features to be included and NOT included in the project)*

The new salary management application will include the functionality provided by the current application. In addition, the goal is to move from the use of CDs to a shared information that re-entry of data will not be needed. This change will require security issues (e.g., defining access to database, protecting data, etc.) to be addressed.

***Deliverable Scope*** *(Project deliverables and PM deliverables to be produced and those NOT to be produced)*

* Project charter
* Data models
* Work Breakdown Structure (WBS) & Gantt Chart
* A functional database
* Process models (Use Case Diagram)
* Physical data model
* User Interface Design
* Construction of actual software application (during internship if time allows or else following internship by someone else)

***Timing Scope*** *(start date, end date)*

* Start Date: September 10th, 2019
* End Date: December 2nd, 2019

***Organizational Scope*** *(organizational units, departments, or people directly or indirectly affected by the project)*

* Mainly affects the way IS Managers and IS supervisors increase/manage the salary of their direct staff.
* Everyone working in the organization who receives a salary.

***Project Plan*** *(steps to be followed in order to successfully complete the project including internal and external milestones****)***

* Gather project requirements and acquire information to be integrated into the system
* Create a Project Charter
* Create Work Breakdown Structure
* Create a Burndown Chart
* Create Gantt Chart
* Formulate an Entity Relationship Diagram (ERD)
* Normalize Entity Relationship Diagram to 3rd normal form.
* Create functional database based off of Entity Relationship Diagram
* Create Use Cases along with a Diagram
* Design Interface
* Present new Salary Management System

***Related Projects*** *(other projects that affect your project AND projects that your project will affect)*

* If future projects associated with a new grading scale are implemented, this system will not be able to handle the updated guidelines.

## Support Plan

A member of the Training and Specialties area (yet to be determined) will support the application long-term. Help Desk will not be asked to provide support for this application since the information is highly confidential.

**Project Management Approach**

***Project Approach*** *(process to be used when working on the project: e.g. interviews, JADs, modeling)*

The project will include requirements discovery sessions scheduled for 09/10/2019.

Appropriate models (logical data model, process model) and design documents (screen, database) will be created. If time allows, the application will be constructed, tested and implemented during the time permitted.

***Status Reporting*** *(how often, timing, format to use, etc.)*

Status Reports will be created during the first week of the month on a monthly basis. The status reports will contain summarized information regarding activity that occurred in the last month along with any critical issues and scope changes. Also, there will be an overview of planned tasks for the next month. This report will follow the standard format that has been utilized for various projects in Information Services.

***Scope Management Approach*** *(how changes to the project scope will be handled)*

The project scope may change as the project progresses. If needed, all members of Team Buffering may submit a change request. Any changes proposed will be documented, analyzed, and submitted to the project sponsor to be approved, rejected, or deferred until a later time.

***Issues Management Approach*** *(how issues concerning the project will be handled)*

Project issues must be identified and resolved in a timely fashion in order for the project to be brought to a successful conclusion. Anyone involved with the project may identify an issue. Issues will be documented and analyzed by the project manager and the project sponsor. Records of both open and closed issues will be maintained in the project issue log.

***Team Training Approach*** *(any training needed by the project team in order to complete the project)*

* Project Management training
* Software development training
* Basic Business terminologies/concepts
* Teamwork and Team management

**Project Organization and Staffing**

## Project Sponsorship and Management

|  |  |  |  |
| --- | --- | --- | --- |
| Role | **Person(s)**  **Assigned** | **Time**  **Commit-**  **Ment** | **Primary Responsibilities** |
| Executive Sponsor |  |  | * Has ultimate authority over and is responsible for a project * Approves changes to the scope and provides whatever additional funds those changes require * Approves final product |
| Project Sponsor |  |  | * Controls the business aspects of the project * Participates day-to-day in one or more projects * Assists in developing the project charter and project plans * Handles issues and change requests * Approves work products * Assists in tracking action items and budgets * Responsible for the functional quality of the solution |
| Project Manager |  |  | * Controls the technical aspects of the project * Controls the day-to-day aspects of the project * Develops and maintains project charter and project plans * Executes formal reviews and management reviews * Tracks and handles issues * Helps resolve issues and change requests * Tracks action items and budgets * Is responsible for technical quality of the solution |
| Account Manager |  |  | * Responsible for portfolio management of their account |

***Project Team***

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Person(s)**  **Assigned** | **Time**  **Commit-**  **Ment** | **Primary Responsibilities** |
| Application Analyst |  |  | * Assesses current systems * Develops and maintains models of business requirements * Designs business transactions * Designs and organizes procedures * Documents and analyzes business processes using value-added/non-value-added, process modeling tools, cost-time charts, and root cause analysis |
| Key Business Partners |  |  | * Provides source information to the team * Provides expert business understanding of the organization * Represents the business area in identifying current or future procedures |
| Application Designer |  |  | * Designs systems from a business partner perspective * Designs human factors (windowing, ease-of-use) * Designs externals (screens, reports, forms) * Designs usability of the application * Acts as technical design specialist * Designs application software components, including programs, modules, and run units |
| Application Developer |  |  | * Prototypes, develops, and unit tests application software components or fragments * Typically knowledgeable in one or more development environments and/or implementation environments |

***Project Support***

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| --- | --- | --- | --- |
| Role | **Person(s)**  **Assigned** | **Time**  **Commit-**  **Ment** | **Primary Responsibilities** |
| Specialist – overall Project Management |  |  | * Consults, supports and serves as the mentor for project overall |
| Specialist – Analysis |  |  | * Consults on analysis for the project * Consults on development of logical database |
| Specialist – Screen Design |  |  | * Consults on screen design for project |
| Specialist – Testing |  |  | * Consults on test planning for project |
| Specialist – Network Services |  |  | * Consults and supports in Network Services area |
| Database Administrator |  |  | * Reviews and consults on the physical database design * Generates the physical database * Tunes the physical database |

**Project Charter Sign-off**

I have read and reviewed this project charter document and am in agreement with the contents as they relate to the Salary Management Application Rewrite Project. I understand that following sign-off, changes to the scope of the project and the project charter can be requested only by way of the Scope Management Approach documented in the Project Charter.

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| Name: |  |  | Signed: |  |  | Date: |  |
|  | Executive Sponsor |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| Name: |  |  | Signed: |  |  | Date: |  |
|  | Project Sponsor |  |  |  |  |  |  |
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| Name: |  |  | Signed: |  |  | Date: |  |
|  | Project Manager |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| Name: |  |  | Signed: |  |  | Date: |  |
|  | IS Account Manager |  |  |  |  |  |  |
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**Changes to the Project Charter** *(changes made after the Project Charter has officially been signed off)*

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| --- | --- | --- |
| **Section Changed** | **Date Changed** | **Description of Change** |
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