

Review Charge and Process

Bill Boroski and Rich Karuhn

March 11, 2009

Kick-off Meeting

Operational Readiness Walkthrough/Review
of FTL Technology and Business Processes

Charge to the Review Teams

- For each functional area:
 - Are there adequate policies, procedures, trained staff and tools in place to accomplish the goals of the functional area?
 - Are there well-identified owners for the various business processes?
 - Will the system perform as intended?
- Overview slides contain some additional information on areas to cover during the review process.

Process

- Team meets to “walk through” the functional area and to explore the charge questions
- Team reviews project documentation (as needed)
 - Project documents
 - Current list of known risks/issues and their current levels, impacts and plans for dealing with them.
- Teams asks for specific additional input from FTL project or divisions or Payroll/Accounting – as necessary
- Team meets again to digest input and begin preparing report
- All reports completed by March 25
- Recommendations presented in a review closeout on the afternoon of March 25

Report Preparation

- We have prepared a report template, which can be found in DocDB under the topic “Readiness Reviews.”
 - URL: <https://cd-docdb.fnal.gov:440/cgi-bin/ShowDocument?docid=3128>
 - DocDB document path: Computing Division Office/Reviews/Readiness Reviews
- Follows the same approach and format used by FNAL Office of Project Management Oversight (OPMO)
- We’ll use the report during the review closeout presentation, so there will be no need to prepare additional PowerPoint slides.

Report Template

3.0 Financial Management Processes

Functional Area Team Leader: Chander Sehgal

Team Members: Cheri McKenna, Molly Anderson, Jeff Mack, Barb Fetzner,
Colleen Yoshikawa

Facts

-

Observations

-

Recommendations

Need to be addressed before any division uses the system

4.

Need to be addressed before go-live with non-exempts

5.

Need to be addressed after all employees are using the system

6.

Report Preparation

- Please edit your section of the report template.
 - Please don't adjust the automatic numbering in the "Recommendations" sections.
- Reports will be collated into a single document by the CD Project Management office
 - Send completed reports to: cdprojects@fnal.gov
- Report preparation schedule:
 - Draft reports due by noon on Mon, March 23.
 - Final reports due by 10 AM on Wed, March 25.

Contact Information

- Bill Boroski
 - boroski@fnal.gov, x4344, 630-531-8205(cell)
- Rich Karuhn
 - rkaruhn@fnal.gov, x3275
- Brad Trygar
 - btrygar@fnal.gov, x5918

Review Teams

Review Teams

Updated 11-Mar-2009

Functional Area	Team Leader	FTL Project Member	Technical Expert	Technical Expert	FTL Core Team or Mgmt Team Member	Other D/S or Acctg Team Member
1. End User Processes	Chander Sehgal	Cheri McKenna	Griselda Lopez			Colleen Yoshikawa
2. Financial Management Processes	Chander Sehgal	Cheri McKenna	Molly Anderson	Jeff Mack	Barb Fetzner	Colleen Yoshikawa
3. Technical Infrastructure	Rob Kennedy	Sripada Joshi	Julie Trumbo	Ray Pasetes		
4. Application & Information Infrastructure	Jerry Guglielmo	Mike Kaiser	Igor Mandrichenko / Matt Arena	Valena Sibley		
5. User Access & User IT Interface	Jason Allen	Mike Rosier	Rob Kennedy	Matt Arena	Irwin Gaines	
6. Payroll & Accounting Processes	Valena Sibley	Jim Wollwert	Molly Anderson		LindaSue Smith	
7. Cyber Security, Disaster Recovery, and Business Continuity Plans	Stu Fuess	Art Lee	Joe Klemencic			