Appendix B: Sample Project Plan Outline and Role Responsibilities

LEGEND:	
Primary Responsibility for the Task =	•
Involved in the Task =	0
Provides Input to the Task =	•
Informed Task Results =	
Optional Involvement in the Task =	

	Project Task	Business End Users	Business Sponsor	IS Sponsor	Business Driver	Business Project Lead	Project Manager	Business Sys. Analyst	Data Modeler	DW DBA	Data Staging Designer	DW Educator	E/U Appl'n Developer	Tech/Security Architect	Tech Support Specialist	Data Staging Programmer	Data Steward	DW QA Analyst
	PROJECT MANAGEMENT AND REQUIREMENTS																	
	PROJECT DEFINITION																	
1	Assess Data Warehousing Readiness		0	0		•		•	•	•	•			•				
2	Develop Preliminary Project Scope		0	0		•		•	•	•	•			•				
3	Build Business Justification	•	•	•	•	•	9	•										
	PROJECT PLANNING & MANAGEMENT				************	•	коооооо						*********					**********
1	Establish Project Identity				******	•							*****					
2	Identify Project Resources		0	0		•												
3	Prepare Draft Project Plan					٠		٠	•	•	•	•		•	•	•	•	
4	Conduct Project Team Kick-Off & Planning					0	•	0	\mathbf{O}	O	\mathbf{O}	O		0	0	O	O	
5	Revise Project Plan					٠		٠	•	•	•	•	*****	•	•	•	•	
6	Develop Project Communication Plan		•	•		0		•	•	•	•		****	٠		•		
7	Develop Program to Measure Success		0	0		•												
8	Develop Process to Manage Scope					0												
9	Ongoing Project Management					O	•											

1	Identify and Prepare Interview Team				******	○	0				*******			
2	Select Interviewees		•	•	•									
3	Schedule Interviews				C									
4	Conduct User Kick-Off & Prepare Interviewees	O	0	O	₩ ₩ ο	C	O							
5	Conduct Business User Interviews	O	0		₩ ⊃	•								
3	Conduct IS Data Discovery Interviews					•	•	O	0				O	
7	Analyze Interview Findings				C	•								
8	Document Findings and Review	•			C	•	•							
9	Publish Requirements Deliverables				C	•	•							
10	Prioritize and Revise Project Scope	•	•	•	•	•	•				****			
11	User Acceptance/Project Review	•			•)	0	0	•	-	•	•	0	•
	DATA DESIGN													
	DIMENSIONAL MODELING													
1	Build Matrix				× 0	•	•	0	•					
2	Choose Data Mart		0	0	•	•	•							
3	Declare Grain				C	C	•							
4	Choose Dimensions					C	•							
5	Develop Fact Table Diagram					C	•							
6	Document Fact Table Detail					C	•							
7	Design Dimension Detail					C	•							
8	Develop Derived Fact Worksheet	0			C	•	0							
9	User Review & Acceptance	0			•	C	0							
10	Review DB Design Recommendations for E/U Tool						0	•	0				0	
11	Review DB Design Recommendations for DBMS						0	•						
12	Complete Logical Database Design					*****	0	•						
13	Identify Candidate Prestored Aggregates	*			· 💥 O	· 💥 O	•	0						
14	Develop Aggregation Table Design Strategy					**** ~	0	•	~	_			~	
15	Review Logical Database Design w/Team					O	0	•	0				0	
16	Certify DB Design with DSS Tool Vendor			_	**** _	**** ~	\circ	•	\sim	_	**** _	_	_	_ 🗱
17	User Acceptance/Project Review	0			•	9	0))	•		•		
	ANALYZE DATA SOURCES				XXXXXXXXXX	***********					***********			>>>>>>
1	Identify Candidate Data Sources					■	O	0	•					
2	Browse Data Content					■	O	O	•					
3	Develop Source to Target Data Map						0	O	•				•	

4 5	Estimate Number of Rows User Acceptance/Project Review	0	0	п	•	• •	0	•	O	•	• •	•	O	•	
	ARCHITECTURE														
	TECHNICAL ARCHITECTURE DESIGN														
1	Create Architecture Task Force				O						•	0			
2	Gather & Document Technical Requirements					•	•	•	•		•	O			
3	Review Current Technical Environment				•	C	O	•	0		•	O			
4	Create Architecture Plan					•	•	•	•		•	0			
5	Determine Phased Implementation Approach				0						•	0			
7	Create Infrastructure Plan				3						•	0			
8	Develop Configuration Recommendations										•	0			
9	User Acceptance/Project Review				•						3 0	0			
	IMPLEMENT TACTICAL SECURITY MEASURES			******	8	******					******				********
1	Develop Tactical Security Plan				O						•	0			
2	Secure Physical Environment										C	•			
3	Install Virus Checking Software										C	•			
4	Secure Access into Environment				{						•	O			
5	Secure Access out of Environment				{						•	O			
6	Implement Rigorous Password Scheme				\$						•	O			
7	Implement Controls for Software Installation										C	•			
8	Audit Security Violations				0						•	0			
9	Monitor Security Privileges by Individual				•						· 💥 O	0			
10	User Acceptance/Project Review				•							0			
	DEVELOP STRATEGIC SECURITY PLAN			*******	\$	*******					******				*********
1	Design Security Architecture				{						•	0			
2	Implement Access Tokens (Elim. Passwords)				{						•	O			
3	Implement Public/Private Keys for Authentication				\$						•	O			
4	Implement Secure Tunneling for Remote Access										•	0			
5	Centralize Authentication & Access Control				}						•	\circ			
6	Impl. Signed Certificates for Software Downloads				3						•	0			
7	User Acceptance/Project Review				•						3	•			
	PRODUCT SELECTION			******	8	*******					*******				********
	(Repeat for each selection area)				1										

1 2 3 4 5	Develop Evaluation Matrix Research Candidate Products Develop Product Short List Evaluate Product Options Optional Prototype (May repeat for diff. products) Select Business Process / Data for Evaluation Define Completion Criteria Acquire Resources (Internal/Vendor) Determine Test Configuration Install Evaluation Prerequisites & Components Train the Evaluation Team Develop & Tune Prototype Conduct Tests Analyze & Document Results Determine Product Recommendation Present Findings / Results To Management Negotiate Contract User Acceptance/Project Review	•	000				000000000000000000000000000000000000000	0000		•			•		
	PRODUCT INSTALLATION			000000000		B00000000					xxxxxxxx				>>>>>
	(Repeat for each product)										***	_			
1	Installation Planning										•	0			
2	Meet Prerequisites Install Hardware / Software											•			
4	Test Hardware / Software														
5				•	0	• • • • • • • • • • • • • • • • • • •	\circ	\circ	\circ	_		0	_	_	
3	User Acceptance/Project Review	_	'		•		•	•	•	_		•	-	-	
	IMPLEMENTATION			*******		*******					*********				********
	IMPLEMENTATION														
	PHYSICAL DATABASE DESIGN														
1	Define Standards	i i		******		******		•			******				
2	Design Physical Tables & Columns	j					•	•							
3	Estimate Database Size					•	•	•	•						
4	Develop Initial Index Plan					•	•	•			*****				
5	Develop Initial Aggregation Plan					₩	O	•							
6	Develop Initial Partitioning Plan							•							
7	User Acceptance/Project Review					C	O	O	O	•	•	•	O	•	
1				\$\$\$\$\$\$\$\$\$\$\$\$\$		^XXXXXXXXXXXX					5888888888				***************************************

	PHYSICAL DATABASE IMPLEMENTATION															
1	Determine DBMS Fixed Parameters			*****	}	*****		•			******					
2	Install DBMS	-						•				0	0			
3	Optimize DBMS Changeable Parameters				ĺ			•								
4	Build Physical Storage Structure				}			•								
5	Setup RAID				{			•				O	O			
6	Complete Table and Index Sizing	_			Š.		•	•								
7	Create Tables and Indexes							•								
8	User Acceptance/Project Review		_	п	□	• 0	0	0	0	•	•	•	•	•	•	•
	DATA STAGING DESIGN & DEVELOPMENT			******	1						*****					
1	Design High Level Staging Process				{				•					0		
2	Develop Detailed Staging Plan by Table				{				•					O		
3	Set Up Development Environment							•	O			O	O	O		
4	Define & Implement Staging Metadata						•	•	•					•		
5	Develop 1st Static Dimension Table Process (Extract, Transformation & Load)						•	•	•					•		
6	Develop 1st Dimension Maintenance Process						•	•	0					•		
7	Develop Remaining Dimension Table Processes	-					•	•	0					•		
8	Develop Fact Table Process (Extract, Transformation & Load)						•	•	•					•		
9	Develop Incremental Fact Table Process				ĺ		•	•	0					•		
10	Design & Implement Data Cleansing	_				•	•	•	•					•	O	
11	Design & Develop Aggregation Process					•	•	•	•					•		
12	Automate Entire Process								O					•		
13	Develop Data Quality Assurance Processes				\$	C	O	0	O					0	\mathbf{O}	
14	Implement DB Administration (Archive, Backup & Recovery)							•	•					•		
15	User Acceptance/Project Review		_	•	O	• 0	•	0	•	0	•	•	•	0	0	
	POPULATE & VALIDATE DATABASE			********	*	*********					*********					***********
1	Set Up Production Environment				{			•			*****	O	0			
2	Load Initial Test Data				Š.				0					•		
3	Initial Data Validation/Quality Assurance				O				0					0	O	
4	Load Historical Data								0					•		
5	Perform Data Validation/Quality Assurance				0				0					0	O	
6	User Acceptance/Project Review		-	9	•	O	O	•	•	•	9	-	•	0	•	•

	PERFORMANCE TUNING														***
1	Set Up Benchmark Queries				0	O	O	•			C	O			***
2	Review Indexing & Aggregation				0	₩	•	•							***
3	Review Tool Specific Tuning				0			O							***
4	Conduct Ongoing Database Monitoring				□			•							***
5	User Acceptance/Project Review			•	0	• =	-	0	0	•	9 -	•	•	•	
	END USER (E/U) APPLICATION SPECIFICATION			******		******									***
1	Identify & Prioritize Candidate Reports	•			•	C	•								*
2	Design Template Navigation Approach				•	•	•								***
3	Develop E/U Application Standards				0	•	•								*
4	Document Detailed Template Specifications				•	₩	•								***
5	Review End User Application Specs w/Users	0			•	₩	\mathbf{O}								***
6	Revise End User Application Specs				•	•									***
7	Revise Project Scope				•	•	•	•	•	•	•	•	•	•	
8	User Acceptance/Project Review			9	•)	•	0	0	•	•		0	•	
	END USER (E/U) APPLICATION DEVELOPMENT			******											***
1	Select Implementation Approach	0			0	C	O								***
2	Review Application Specifications	0			0	C	\mathbf{O}								***
3	Review Application Standards				0	C									***
4	Populate E/U Tool Metadata				•	•	•	•	•				•	•	***
5	Develop E/U Applications					C									***
6	Provide Data Accuracy & Cleanliness Feedback				0	₩			O				O	\mathbf{O}	
7	Develop E/U Navigation				•	C									*
8	Review w/Users	0			0	C									***
9	Document E/U Applications				•	C									***
10	Develop E/U Application Maint. Procedures				0										
11	Develop E/U Application Release Procedures				0										
12	User Acceptance/Project Review	0			•	9	0	0	0	0	•	•	•	-	
	DEPLOYMENT & GROWTH														
	DEPLOYMENT PLANNING														
1	Develop Desktop Infrastructure Checklist			*****	{						•	•			***
2	Develop Initial User Education Strategy	•			•	₩ ₩ ο	0			•				\mathbf{O}	***
3	Define User Support Strategy				•	₩ ₩ ο									***
	Define Release Plan			- WWW	1	× × × ×					*******				***

5	Review Deployment Strategies & Release Plan					•	C	O	O	O	\mathbf{c}	C	•	O	O	
6	Develop User Course Materials	•				•	•	•			•					
7	Develop Support Procedures					•	• O	•	0	0				0		
8	User Acceptance/Project Review					•)	0	0	0	0		•	•	0	9
	COMPLETE SYSTEM TEST															
1	Run Complete Data Staging Process								•	•				•		
2	Perform Standard QA Procedures					0			0	0				O	O	
3	Run Core End User Applications					O	O									
4	Review Overall Process					•	• O	O	0	O	O	₩	O	O	0	
5	User Acceptance/Project Review					•	O	0	O	0	O	O	0	0	O	
	DEPLOYMENT (ALPHA, BETA & PROD'N)															
1	Assess Deployment Readiness				******	•	******	-	' ·		-	******		_		
2	Configure & Test Desktop Infrastructure												•			
3	Set Up Security Privileges	j							0			•	0			
4	Educate Users	0				0	O				•					
5	User Acceptance/Project Review					•	C	O	O	O	0	C	0	O	O	
	DATA WAREHOUSE MAINTENANCE				********		anaman r	Ī						Ī		*********
1	Provide Ongoing User Support	0				•	C				0		0		0	
2	Provide Ongoing User Education	0				0	•	•			•				•	
3	Maintain Technical Infrastructure								•			•	•			
4	Monitor End User Query Performance					•	•		•							
5	Monitor Data Staging Performance								•	•				•		
6	Monitor Ongoing Success	•				•	•	•	•	•	•	•	•	•	•	
7	Communicate Continuously and Market Success	0	0	O		•	C	O	O	0	O	C	O	O	O	
8	User Acceptance/Project Review					•	O	O	0	0	O	O	O	O	0	
	DATA WAREHOUSE GROWTH															
1	Establish Data Warehouse Steering Committee				********		********					**********				*********
2	Establish Enhancement Prioritization Strategy			•		0										
3	Iteratively Use Business Dimensional Lifecycle	0				•		\circ	\circ	\circ	\circ	****	\circ	\circ	O	
J	iteratively use business difficultar checycle	9		•		_	****	<u> </u>	•	<u> </u>	•)	<u> </u>)	

Kimball, Ralph, et al, <u>The Data Warehouse Lifecycle Toolkit</u>, New York, NY:Wiley, 1998