



Production Readiness Review (PRR)

FP Data Mart
Release 1

May 24, 2001





Business Case

The FP Data Mart Release 1 provides the following capabilities for SFA:

- Infrastructure/system for consolidating customer information for employees and partners
- More efficient access to customer information from the FFEL system
- Access to information for external financial partners

The FP Data Mart Release 1 meets the objectives of the PBO as follows:

- Reduce unit costs – eliminates the need for additional extracts (coded by contractors) from the source system while concurrently providing increased analytic capabilities (e.g.: proactive identification of potential risks which might result in overpayments).
- Improve customer satisfaction – promptly satisfying requests from customers (e.g.: the GAO, IG, Legislature, other Channels) for information from the FFEL system related to GAs and Lenders.
- Improve employee satisfaction – allows employees to focus on the customer and providing assistance.





Summary of Approach

- **Analysis and Design:** During this task, the team analyzed the functional and data requirements and mapped the source data (FFEL system) to the target data (FP Data Mart). The team also designed the technical architecture in accordance with user needs (e.g., number and location of users, data access, security, etc.). This work effort also involved coordinating the FP Data Mart requirements with the retirement of the FFEL system.
- **FP Data Mart Development:** During this stage, the team created the data base, developed the Extract, Transform and Load (ETL) process from the source data to Oracle (using Informatica), and developed the views, report formats and layouts for the users (using MicroStrategy).
- **Testing:** This task consisted of system and product (user acceptance) testing to ensure that the FP Data Mart provided accurate and complete information in accordance with the documented functional and technical requirements.
- **User Training:** During this task, the team prepared for and conduct user training prior to deployment of of the FP Data Mart.
- **FP Data Mart Deployment (Release 1):** This task involves migrating the FP Data Mart components into the production environment and providing transition support to the users.





Overview of Cost and Schedule Results and Issues

- Schedule
 - Project Kickoff January 18
 - Analysis and Design January 2 – April 18
 - FP Data Mart Development March 26 – May 16
 - Testing (system/product/stress) April 30 – May 23
 - User Training May 10 – May 22
 - FP Data Mart Deployment May 29

- The team agreed to delay the deployment by one week to make sure that a quality product was delivered by conducting additional data validation and testing.

- The application will be deployed on budget.





Testing Summary

Level Of Testing	Testing Team	
	Development	SFA
Unit	x	
System	x	
Product/User Acceptance		x
Stress	x	





Testing Summary Continued

- Summary of Test Findings by category:

Type of Investigation Request	Status Of Request	
	Closed	Open
Clarification	2	2
Data Related	7	0
Expected Results	8	0
Defect	8	1
Total	25	3

- Clarification - A question that requires further research or spelling and minor wording changes.
- Data Related – Data not properly copied into the table from Development, a new version of an input file was required, or data was not loaded properly from ETL.
- Expected Results – The expected results did not agree with the data that was actually on the FFEL system and thus copied to the Data Mart system.
- Defect – a problem with a report in MicroStrategy such as missing a requested field on a report, ability for external financial partners to select reports that do not prompt for GA or Lender id, incorrect report descriptive text, and having too many fields in the ‘page by’ area (this item was logged as an issue with MicroStrategy).





Testing Summary Continued

- Tools Used:
 - Rational TestManager used for stress test
- Results
 - Successful conclusion of test phases





Collaboration

Area	Responsible Party	Recommendation
VDC	Dave Lass	Approved
Security	Andy Boots	Pending
SFA CIO IT Management	Wayne Wright/Denise Hill	Pending
Applications Maintenance	Anna Allen	Pending
Procedures	Katrina Turner/Anna Allen	Pending
Financial Partners Sponsor	Johan Bos-Beijer	Pending
Users	Anna Allen	Pending
QA/QC	Mike Rockis	Pending





Independent Quality Assurance

- The project followed a hybrid of IPT, SDLC, and MicroStrategy Methodology. Rapid Application Development (RAD) and Decision Support System (DSS) development approaches presented challenges for the ‘standard’ QA approach.
 - **IT Management plans to adopt the MicroStrategy Methodology for development of data marts. It is planned that the SDLC will be updated to reflect this approach.**
- The external QA vendor
 - Started on the project 2.5 months into a 5 month project
 - Possessed minimal to no prior experience in development of data marts or the use of data mart tools
 - Reviewed documents and submitted opinions and comments
- Recommendation from External QA
 - ????





Summary of Outstanding Issues and Compliance

- Section 508 Standards not fully met for Release 1
 - Department of Education conducted an independent test of the MicroStrategy product. Report of the findings is available.
 - Department of Education CIO received and accepted a letter from MicroStrategy indicating their intention to upgrade their product to comply with Section 508 requirements.
- A very complex report, the Lender Scorecard, is not yet completed. This report will be completed by June 1st.
- Initial deployment is to internal SFA personnel. Deployment to the external financial partners (e.g., GAs and Lenders) will depend upon their signing an MOU and acceptance of their Rules of Behavior.
- Several items on the PRR Checklist are dependent upon an Application Maintenance task order. The appropriate parties are working together to get this approved.
 - Application Management Task Order Reviewed and Approved
 - Escalation Process
 - Change Control Procedures
 - Application Service Level Agreement
 - Application Operation Level Agreement
 - Application Help Desk Established
 - Support Available for Software Package
 - Organizational Design and Skills Identified
 - Knowledge Transfer Plan

