

ProServe

Overview

The ProServe project has been initiated by BravePoint executives. The project will consist of building an executive dashboard that will display Key Performance Indicators (KPI's) gathered from the MoneyPenny application. The dashboard will be used by the executives at BravePoint as a tool to assist with measurement and analysis of past and current trends. The software that is currently available does not provide data visualization or an analysis tool. The current system is time consuming to query, therefore there is a need for a dashboard to visually and intelligently relay information to key executives within BravePoint.

The objective of the project is to develop an executive dashboard that exceeds the expectations of the stakeholders. The application must provide high-level KPI's with the ability to drill-down to smaller details pertaining to the KPI. There will be a minimum of three KPI's with the possibility of more. The KPI's will be determined through the discovery process where the stakeholders will be interviewed by the team. The information will be compiled and examined in order to design the Business Intelligence (BI) blueprint. The blueprint must be approved by the stakeholders before design is to begin. Once the blueprint is approved, the dashboard will be developed and tested.

The scope of the project will include planning, discovery, design, development, and testing. The scope will also include the completion of all documentation including end-user instructions and a formal presentation to the executives. Completion of the project will occur when the software has been approved and accepted by the BravePoint executives.

Project team

Roles	Name	Major role and responsibilities	Contact
Project owner/sponsor	Alex Oliveri	To provide project details and maintain communication with team.	_____
	Mike Marriage	To provide project details and maintain communication with team.	_____
Team leader	Lisa Meeks	Organize meeting with team and project owners. To monitor progress of project and submit deliverables.	_____
Team members	Matthew Butler	Technical Specialist: analyze, design and develop technical solutions.	
	Girum Demissie	Technical Specialist: analyze, design and develop technical solutions.	

	Lisa Rehberg	Technical Writer: prepares all documentation including presentation and poster materials	
--	--------------	--	--

Major milestones and deliverables

Overall final deliverables

- KPI list
- BI Blueprint based on discovery engagement using sample template
- Dash board application built in Qlikview, with complete documentation
- Formal presentation to BravePoint Executives

Milestone

By 9/29/2013

- Discovery phase complete
- KPI list is complete
- Wireframes are designed

By 10/27/2013

- Design phase is complete
- BI Blueprint is approved
- Prototype of dashboard

By 11/24/2013

- Dashboard application is complete
- Testing Complete
- Presentation draft

Communication and Meeting Plan

The main source for communication for the team will be through Gmail, Google Drive and Google Hangouts. The team will meet weekly on each Monday at 1:00 P.M. either on SPSU campus or Google Hangouts. The goal of each meeting will be to obtain a status report of each member's progress in the project.

The team leader will conduct meetings with Professor Zheng no later than one week before each Milestone report is due. The team leader will also communicate with the project owners, Mr. Olivier and Mr. Marriage via email and occasionally at BravePoint headquarters.

Resources and Materials

List any resource and material that will be used for the project, including technology, product, book, data, report, web sites, etc.

- QlikView
- QlikView license key
- <http://community.qlikview.com/welcome>
- <http://www.qlikview.com/us/services/training/free-training>
- SQL server
- ERD of MoneyPenny
- MoneyPenny database
- Microsoft Suite
- Internet connection

Project schedule and tasks

Please see the “Progress Planning and Tracking” attachment.

*Last names are used to avoid first name conflicts.



Progress Planning
and Tracking_ProServ

Other planning

Additional planning is not necessary at this time.