

 **EMSONline and RosterCoster**

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| Org: our ref | A JPAC |
| Project | > Attachment 51: Parent project for apps and projects hosted via EMSONline |
| Project status | 500 Project plan (current as at date of plan) |
| Addressed to | <i>Name, position, program, organisation, phone, email.</i> <i>May or may not be the project manager. Typically, addressed to the manager with the relevant financial delegation, and cc'd to the project manager. Name, position, program, organisation, phone, email.</i> |
| Addressed from | Damien Ryan-Green Director Jandapac T/A RosterCoster ("RosterCoster.com") Mobile: 0438 388 922 Email: Damien.Ryan@RosterCoster.com Web: www.RosterCoster.com |
| Your project manager | > Vacant, Position |
| Our project contacts | > Ryan, Damien; > Ryan, Tony; > Staub, Claude; > Tiernan, Christine; > Thomas, Guy; > Tran, Minh |
| 010 About us | <i>Optional: attach screenshots of relevant webpages at RosterCoster.com</i> EMSONline and its apps and projects, including RosterCoster.xls and RosterCoster.com , are supplied by Jandapac Pty Ltd (Australia) ACN 121 761 699, ABN 57 121 761 699. For more information, visit RosterCoster.com . |

050 Introduction

Disclaimer

This document is continuously added to as a "living document" in response to, and therefore shadow-authored by, the numerous project managers at the customer-end that we work with.

The needs of one customer may not match the needs of another, in terms of the words used under each section.

As such, we request that you discuss with us alternative text that should apply with respect to your app or project, and that text (written into your own project plan, same layout as this document) will take precedence over the text in the same section as in this document.

Finally, please refer also to our "standard term & conditions on the home page of both *EMSONline* and www.RosterCoster.com: the above paragraph applies to those as well.

About this document

The current document is in the first instance geared to ensure that our platforms and apps comply with the requirements of the Department of Human Services (our largest customer), and this benchmark standard is then extended and adapted as required for CSOs and beyond.

The document is a "parent document" that is attached to the project plan for any "app" that is hosted at one of our platforms.

The downside of this document is that it is lengthy and detailed, as it captures ongoing the sum total learnings and issues arising out of all projects / apps hosted.

The upside is that it has the significant advantage of excising this detail from individual project plans, while still including it as an attachment, for the purposes of the many procurement, contracting and compliance rules that apply when developing apps for DHS and, by extension and adaptation, beyond.

Benefits of this document

Benefits include:

- A trend towards standardisation driven by our customers
- A comprehensive project management and risk framework for even the smallest of projects
- The child document does not need to duplicate items covered by this parent document.

Our app-hosting "platforms"

Jandapac Pty Ltd T/A RosterCoster is the supplier for "platforms" that host "apps", or functionality. For example:

- An online platform ("www.RosterCoster.com")
- An intranet-based platform for ("*EMSONline*")

EMSONline is the result of a long and gradual process (since 2001/02) that has, and continues to, network into a single system a large number of previously "standalone" tools and processes within DHS and beyond.

Why multiple platforms?

The imperative for multiple platforms is dictated by the needs of our customers, which have different data management and user access requirements for different functionalities. For example:

- For apps that contain client-related data, we typically recommend the intranet-based platform, which live within the organisation's firewall.
- For apps that have lower data sensitivity, but which also require staff (including casual staff) access from home, iPhones etc., for example, "logging staff availability", we opt for the online platform.
- Office use only: ARCHIVE_100903_1633

Project plans too extensive? Prefer a more accessible "executive summary"?

- In large part, a comprehensive document like this one exists to cover all bases in for example, DHS's Purchasing Guidelines and Standard

Contract, and is not a good forum for time-poor stakeholders to comprehend a project.

- Typically, an executive summary of each project is established and maintained as a permanent slideshow (we have a standard template for this) out of *EMSONline*.
- This slideshow is presented to stakeholders at key points in time during the project, starting out as an "options" document during project initiation, converting into a "project plan" after a quotation is accepted, and then converting into a "progress document" during the lifetime of the project right through until project review.
- After the project, the slideshow acts as a permanent reminder of the project, viewable at any time.

Our project management software

- The key tool that controls all activities relating to developments at *EMSONline*, and which acts as a virtual project manager (along with Damien Ryan-Green and his project management team) is *EMSPProjects*, our project management software.

100 Project team

EMSONline's management team

- Tony Ryan, Manager Technology and Applications Development, phone 0407 139 796
- Damien Ryan-Green, Coordinator Products and Projects, phone 0438 388 922
- Claude Staub, Manager Strategic Marketing, phone 0433 888 889

Project team members for a specific project will be nominated in the child document.

105 Key project roles

If your app or project is hosted via EMSONline, consider attaching the EMSONline continuous improvement plan, rather than duplicating information covered in that document in this section.

Overview

Our app development and project management is a production line, which, for even for a project of less than a day, we include three levels of project management and four stages of development (App Design, Test App, Pilot App and Release App").

A practical consideration. When we log tasks at *EMSPProjects* that happen to arise from emails, perhaps with very large attachments, we typically forward the email to ourselves and you with a "reference no.", for example "ARCHIVE_100922_1730", which we can link back to (via "search" functions in email programs). This avoids the clear inefficiency and time and hosting expense of shifting attachments from emails into our change request system.

Project marketing

For smaller projects, this comprises a slideshow that summarises the project at all points in time.

The rationale for this is that a document in the layout of the one you are reading is rarely comprehended (in large part, a document like this one is to cover all bases in for example, DHS's Purchasing Guidelines and Standard Contract, and not as a good forum for communication.

Project controller

The project manager for us sets up the project online from the moment of initiation / quotation for the project manager. The key role that, via *EMSPProjects*, (automated project management) manages the people, milestones and tasks to project completion.

The KPI for the project manager for us is that neither the customer nor us as developers should ever get a "surprise" with respect to what the customer expects, and what we deliver. Even small gap in understanding is unacceptable, for example, the customer thinking X will be ready any day now, and the developer having it in mind that there is still weeks off hard work involved.

App Designer

Historically, our developments have been "organic" developments, with no sketches or "specs" prior to coding commencing that were reasonably close to the final look and feel.

The final look and feel for a module or tool was slowly (sometimes over many months) arrived at via a large succession of fully coded drafts.

Increased demands re *EMSONline's* growth, along with increasing budget and timeline pressures, make this a luxury no longer possible.

From Sep 2010, we have the services of non-coders Christine Tiernan, Claude Staub and others who are will collect from you your "App Design" (or "specs" or "pseudo-specs") so that coders can "see" the final product before they start coding.

The core benefit of this approach will be that "drafting of ideas and exploring of options" will happen before coding starts, rather than after. A dramatic increase in efficiency, as drafting ideas and piloting ideas "within" a developed piece of software is extremely expensive in code time, whether chargeable or not.

A value-added benefit is that the first time a user sees the new app or module, it will be the final look and feel, or very close to it (too often, we have brought users along for the entire development journey, and while this has saved money on specs development and project teams, it does make your app seem, in the mind of the user, to be constantly in draft.

The key tool for app design is the "TQC App Design Quality Control Tool", a collaboration between Christine Tiernan and Damien Ryan-Green.

110 Stakeholders

Key stakeholders are as follows:

- The project manager at your end
- Jandapac's directors (Jandapac is the supplier of *EMSONline*)
- The *EMSONline* management team (see "project team")
- Other stakeholders may be nominated by you or us.

120 Terms of reference

The requirements of *EMSONline* are that it:

- Be configured to meet the requirements of your environment (upgrades relating to changes to your environment, the scope of which is controlled by you, are raised as one off projects on an as needs basis. Recent examples include an upgrade to ThinClient by one of our

customers, and an organisational restructure, both of which were funded).

- The status of *EMSONline* is that it is an 'evolved' system over a period of more than 10 years.
- The current continuous improvement program ensures that we actively request maximum available security and robustness at all times, as you assess as being appropriate risk management against the data being hosted.
- Contains, as a minimum, the functionality that every app hosted at *EMSONline* requires of it.

| | |
|--|---|
| 130 Background | The background to the project are developed / confirmed with you. |
| 140 Issues and special considerations | Any issues, sensitivities and special considerations are developed / confirmed with you. |
| 150 Scope of project | <p>PLEASE NOTE: For very small projects, or miscellaneous tasks, a project plan separate to this parent document (or a similar <i>EMSONline</i>-wide document) may not be required. Note ARCHIVE_100922_1411 which states: "We at our end are able to raise miscellaneous tasks directly against the attached continuous improvement program, if the task is deemed ... to be "EMSONline-wide" rather than [app-specific]".</p> <p>The scope of the project are developed / confirmed with you.</p> |
| 160 Project outputs | <p>Key functionality and features of hosted apps are pre-coded within <i>EMSONline</i> (see also: "215 Cost driver: start-up (pre-code) hosting for new modules"). These should nevertheless be noted, as they are delivered to each app hosted:</p> <ul style="list-style-type: none"> • See ARCHIVE_100805_1437: "[The EMSONline] data control centre is now a tool in its own right, and is becoming the most significant and complex tool at <i>EMSONline</i>, inasmuch as every other tool will be increasingly "losing" data entry fields to it, and as a consequence, these are "shrinking"... The data fields the individual tools will "lose" are all data entry fields that can be related to staff, houses and clients." As such, the removal of fields previously included in a hosted tool are an output of a project. • Permissions control and workflows (which take templates that a user can "saveas" and, for example, lose, out of circulation, and which also allows for electronic signatures, where previously paper and pen were required. A key to our ability to promise this functionality is that we have achieved a critical mass of apps and users after a decade in development, and our lists of houses, clients, staff and user permissions are continuously up to date. • App creation wizards; similar to e-forms, except in Microsoft Excel and other applications, our pre-doce allows us to "plug in" your designs to a pre-coded templates. • User support systems: user support is assured at the point of "App Design" via the TQC App Design Quality Audit Tool. Comprises online user manuals, quick guides, FAQs and escalating supports that may recommend targeted training. |

170 Methodology

Our production line

Our app development and project management is a production line, which, for even for an app or project delivered inside a single day, upwards of 5 or 10 people at our end may be involved.

The rationale for this is that a production line approach, for example, allows millions of dollars worth of management & admin, research & development, robot automation and human skills and input to go into the production of a single, inexpensive motor car.

Our standard methodology

Our standard simplified (minimum) development process for apps and modules is a 4-step process as follows:

- Development (with or without us) of a **Design Version** of the app or module, literally, the finished product as a paper-based package. Hand-drawn screens are acceptable for small budget projects, and should include a user manual (or "cheat sheet" for very small developments), data validation instructions (for example, "this data entry field should contain only integers greater than zero") and access to help desk for the user with escalating help.
- Development (by us) of a **Test Version**. Coding must not commence until the coders can "see" the finished product in the package "Design Version", and testing will usually be carried out by the customer, with feedback via our change request system.
- Release (by us) of a **Pilot Version**. Must not be released until the customer has signed off on the "Test Version". This is actually a live release, except only to a "pilot group" of users. Users will log feedback from within the tool via our change request system, which our project manager will use to get approval for changes, get them coded, and get them signed off by the customer.
- **Release Version**. If the first 3 steps above are done properly, this is simply a rubber stamp. But in reality, real world users always identify additional improvements not identified by pilot users.

Risk management considerations

Typically for apps and modules at *EMSONline*, customers request a simplified development process that excludes formal specifications development and formal testing/debugging, all of which would exceed most budgets before coding commenced. In risk management terms, this can be an "acceptable" risk, balancing likelihood and consequence of issues against budget. A key consideration is that apps at *EMSONline* are higher quality / lower risk than the pre-existing tools or models upon which they are based.

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| 175 Change management | <i>Change management must be included as part of the project plan for all apps, in cases where an app is being implemented, varied or decommissioned.</i> |
| 180 Milestones and timelines | <p>The milestones and timelines for the project are developed / confirmed with you.</p> <p>For larger projects, the detail may be extended, and covered separately, in our standard Attachment 3: milestones.</p> |
| 190 Quotation / budget (see also: 'cost drivers') | <p><i>Include: quotation, budget, amt invoiced to date, future hosting funds committed, balance of funds remaining at hourly rate, comment regarding works still to be done v. funds remaining.</i></p> <p>See also: our product / price guide at www.RosterCoster.com, which contains a set of sample quotations for different types of apps and projects. We welcome you to use these as a guide for quotations you would like to see developed for your own specific apps and projects.</p> |
| 200 Cost driver: start-up costs (platform functionality to create new apps / modules) | <p><i>Guide only: In July 2010, \$10k one-off was applicable for WCCalculator'.</i></p> <p>Applicable to new apps only, or new modules within apps, only. Provides you with access to pre-prepared functionality and rollout processes.</p> <p>For enhancements to current modules, write "NOT APPLICABLE".</p> |

300 Cost driver: weekly hosting costs (platform functionality & maintenance)

Guide only: for "WCCalculator", \$240 per week was applicable for a tool covering staff for approx. 200 accom. services.

The costs for the project are developed / confirmed with you.

For consulting projects and tasks not involving ongoing app hosting, write "NOT APPLICABLE".

400 Cost driver: project management

In line with the production line approach, project management has two drivers: EMSPProjects (automated project management) and the project manager (after a project is setup, the project manager manages the projects people, milestones and tasks towards project close).

- See also: "**105 Key project roles**".
- As a guide only, approximately 25% of a budget for a new enhancement: for a \$20k development lasting 3 months, \$1k for project setup and starting project plan, \$3k allowance for one day per month for project control, and \$1k for review and project close at end, including continuous improvement plan.
- For onsite meetings and visits beyond 50km, allow for travel time.

Please note: a minimum level of project management as seen above must be allowed for, to avoid risks such as a "gap" between the expectations of a project manager at your end, and the understanding of the deliverables at our end.

440 Cost driver: marketing and communications for stakeholders and users

Not forgetting to market the project to stakeholders and users, and to keep them updated on progress, is a major factor in eventual user acceptance even before coding commences. It is easy to do (for smaller projects, a simple slideshow via a link at EMSOnline that lists the outputs, features, benefits and our progress is sufficient), and it is easy to not do.

This process typically starts before all others, even as the idea for a project is being developed, see our standard slideshow "Towards a business case: opportunities and benefits of hosting a template or design idea at EMSOnline as a networked app", which converts into a project progress slideshow, and is then maintained for the lifetime of the project as a link out of EMSOnline.

510 Cost driver: help desk

This is based on usage, and is in general minimised by ensuring maximum automated user supports (such as well-thought through app / module design and data validation, numerous links to handy tips, FAQs and user manuals).

Please note that help desk costs depend on the level of attention given to:

- 240 Cost driver: implementation, orientation and training support (as a minimum, users should receive "train the trainer" orientation - the help desk is in general not funded as a training resource).
- 260 Cost driver: App or module design version (including user supports from within the app including data validation, handy tips, FAQs, user manuals and access to escalating human supports such as orientation and training).
- 270 Cost driver: formal testing (typically, the customer elects to do this, as a budget saving measure but also to guide the development).

Where compromises need to be made on the above (which can be acceptable, in risk management terms; likelihood v. consequences) this must be noted in this section.

520 Cost driver: implementation,

Typically, in order to reduce costs, this is a joint effort between the customer and us.

orientation, training Where compromises need to be made in this area (which can be acceptable, in risk management terms; likelihood v. consequences) this must be noted in this section.

Please note: a minimum safety net for orientation of users must be included, typically via "train the trainer orientation by a line manager or similar, combined with access from within apps to user supports such as data validation, handy tips, FAQs, user manuals. If this safety net is not possible, then in general, we will be unable to quote, due to risks of adverse user acceptance and damage to the reputation of *EMSONline* platform and other hosted apps.

700 Cost driver: App testing Typically for *EMSONline* apps, this is carried out by the customer, who logs changes at "Log a request..." at www.RosterCoster.com. Then, the project manager compiles the results in the "future options" screen at *EMS Projects*, and seeks approval from the customer and / or agreement from the developers.

N.b. for all "future options" that are not in scope, the project manager must collect these together for review at the next project team meeting.

710 Cost driver: App design version *Must be attached to our standard App Design Cover Sheet. Typically, in order to reduce costs, this is a joint effort between the customer and us. The developers must be able to 'see' the final product, including links to user supports and help desk, prior to coding commencing.*

Typically, this "Design Version" is drawn up (hand-written is acceptable) by the customer, however, our project manager and developers need to review the document to ensure that they can "see" the final product prior to coding commencing, and request a resubmit if necessary.

The person designing the app may also need to seek advice from the developer during the design period, in terms of:

- What is and is not possible (though as a rule of thumb, if it is logical, it can be done); and
- Whether there are better ways of doing things (for example, instead of a "pop-up instruction telling a user what to do next", get the software to push the user towards where he or she should go next (as a rule of thumb, pop-up instructions means poor design).

720 Cost driver: App test, pilot and release versions Key roles to include here are: (a) code; (b) test; (c) debug.

The costs for the project are developed / confirmed with you.

800 Cost driver: project-specific consulting & admin support *Consulting and admin arising from the project. Typically, in order to reduce costs, this is a joint effort between the customer and us.*

900 Risk mgt: terms & conditions **Thank you for visiting or downloading our standard form contracts**

This document, like other documents you may have received from us or downloaded, is in a "standard form", and is part of the overall standard form contract we offer you as a starting point for whatever individual terms you may (or may not) wish to create with us.

The benefits of a standard form contract?

Standard form quotations, like standard form terms & conditions, apps, project management and standard form just about everything else keeps costs low.

Even our reports - that is, the key headings that are common to most reports - are databased: we avoid the idea of creating reports in Microsoft Word, for example.

In short, your job is largely pre-coded, pre-planned and pre-implemented before you even come to us: all the heavy labour, in terms of paperwork and software alike, is pushed back to a pre-project-initiation phase.

When should we depart from standard form contracts?

Actually, we actively encourage you to depart from our standard form contract, for reasons laid out in our standard form terms & conditions, which read as follows:

"Standard form contracts are typically highly advantageous to the party drafting the terms (in the current case, us), with an implication that the other party has no opportunity to vary the terms. The Trade Practices Amendment (Australian Consumer Law) Bill (no. 2) 2010, when it enters legislation, is apparently going to be unsupportive of standard form contracts where the other party does not have a reasonable opportunity to negotiate individual terms.

"While there is a clear benefit in this for you the customer, we think that individual terms is better in the long run for us as vendors as well: better contracting habits are usually win-win for all.

"As such, we invite you to contact us to negotiate individual terms in relation to any services we supply (see below). For convenience, you may prefer not to 'start from scratch', but rather, sit with us and create an additional attachment that spells out where our individuals terms differ from your and our standard form contracts.

"Having made this invitation, we note that many of our services are easily obtained online or remotely, and as such, there can be a time lag between you obtaining our services, and you and us negotiating individual terms, if in fact we ever do. In which case, we need default terms..."

When should we depart from standard form apps, or standard form anything else?

We can supply you tailored apps that depart from our generic apps, for example, however, there will be a one-off cost for the actual tailoring, and an ongoing cost for version control (version control ensures that your tailored app is not overwritten by future upgrades of the generic app, and also allows you to receive upgrades coded into the generic apps, which without version control would bypass your tailored app).

905 Risk mgt: contracting and intellectual property

Intellectual property

As regards apps owned by you, but hosted by us (for example, in the case of apps hosted at our *EMSONline* platform), on a technical, as distinct from legal, level, these apps are inseparable from the hosting platform.

The reason for this is that only a portion of the functionality is in the app: the rest was in *EMSONline* prior to the development of the app.

This inseparability is the trade-off for the app getting access to the pre-coded functionality in *EMSONline*, which if coded into the app to make it a standalone app, would make that app prohibitively expensive, and block other economies of scale offered by a platform, such as a shared database for staff, client,

permissions and other details.

The practical implication of this is that "IP for an app resting with the customer" means that we cannot on-provide these designs (or indeed, the apps themselves) to others unless you invite us to.

EMSONline and competition

EMSONline has evolved organically in a number of organisations and this has, as it turns out, given it a competitive edge over platforms, which tend to be more generic and "off the shelf" than *EMSONline*.

For example, a recent RFQ included an item "platform and data maintenance", which meant that other applicants were forced to quote to first build a platform, and then have it populated with an extraordinarily large amount of house, staff, client and permissions data, and workflows, and only then, deal with that item. We, on the other hand, had all that covered.

Having said that, this should not be interpreted as an uncompetitive advantage. Other vendors have competitive advantages that we do not have, and we have been disappointed from time to time to have been unable to compete for projects that we have been uniquely intimate with, but which have been won by high profile multi-nationals.

EMSONline policies, procedures and processes

In addition to our project plan layout (the current document), which ticks most of the known boxes, we voluntarily offer, in the interests of promoting good overall governance, to take all reasonable steps to ensure all the right "good process" boxes at both our end and your end (we have a lot of exposure to the latter), subject in certain cases to your directions.

Our project management processes have been upgraded in 2010 as a response to significant growth and discussions with key customers, and we demonstrate, as a minimum compulsory standard, continuous "readiness" in terms of contracting and project management, where *EMSONline* is selected as the provider of an app.

The key documents that drive our processes are (a) the current parent document, and (b) a project plan for each hosted app.

However, it is frequently the case that works must proceed before a contract is agreed, on the basis that we provide live software. In such cases, we make sure the paperwork summarising these works and their costs are covered at our end, but note that at the customer end, especially in larger organisations, "the contract" and purchase order can be months after the fact (the longest we have on record for this is 13 months, after which we were duly paid).

We expect there will continue to be some delays in contracting and other matters from time to time, as our chosen sector is human services, which inevitably has competing and often emergency priorities that out-rank software development.

However, we will continue to facilitate these processes as much as we are in a position to.

Trigger for a change to procurement arrangements, July 2010

Historically, before July 2010, the apps we hosted "chipped in" on *EMSONline*-wide responsibilities on behalf of all apps at *EMSONline*. For example a

rostering project might be responsible for the accuracy of "house and staff details", a client funds management app might be responsible for client details, and another app might be responsible for the email addresses of managers who should receive workflow emails.

However, in July 2010, after we completed a major update of house details for a customer, a "surprise" change of strategy occurred, and the customer recommended that such "EMSONline-wide costs" would be better attributed to an EMSONline-wide project.

While a good idea, such a project did not exist, so we were obliged to work quickly to get such an "EMSONline-wide project" established, and now, miscellaneous works that are judged to be "EMSONline-wide" can be matched against either this current document, or a separate document if the works are large enough to be considered to be a "formal project".

Parallel to this, two key audits of EMSONline regarding data protection and other processes triggered an imperative for us to tick certain additional planning and other boxes (audits are always a valuable source of the sorts of compliance boxes that an organisation needs to have "ticked". This is a continuous process, as an org is always free to introduce additional requirements at any time, and the key is not to have anticipated all of these, but to respond as quickly as is practicable, upon being made aware.

Our processes ensure that we are able, and do, respond quickly and effectively.

Procurement arrangements, July 2010 onwards

The current document is provided as a "parent project" and standard attachment to all projects relating to apps hosted at EMSONline.

The relevant project managers for *EMSONline*-wide activities are the managers that RFQ for these activities.

RFQs at all times means multiple applicants. However, like all providers, some RFQs in the past have been for tailoring of an app provided by us, and not providable by another vendor, which has from time to time forced us into a waiver situation:

- Any activity that relates specifically to a given app is charged to the project for that app.
- Any activity that is judged from time to time to be "*EMSONline*-wide" may be quoted as a mini-project separate to the hosted apps, with the current continuous improvement program acting as the relevant formal project document.
- As a guide, in the second half of 2010, we carried out three *EMSONline*-wide projects, one being the aforementioned "house update", another being an upgrade of EMSONline to allow it to run in a certain specific (new)environment, and another to carry out the two aforementioned audits.

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910 Risk mgt: project control

EMSONline and hosted apps / consulting are managed via *EMSPProjects* at www.RosterCoster.com.

The driver for project control at *EMSPProjects* is regular project team meetings (minutes of these meetings are typed into the *EMSPProjects* project plan screen) with a minimum agenda as follows:

- Introductions
- Table current project plan (if any adjustments since previous project team meeting, project plan is subject to feedback post-meeting)
- Review milestones, tasks and timelines
- Review response to most likely future "unknowns" (risks)
- Next meeting

All change requests and tasks must be logged at "log an order or request" at www.RosterCoster.com:

- We cannot accept requests by email (email requests cannot be efficiently tracked for a resolution).
- Further, change requests must be logged as single tasks (a logged change requests cannot be efficiently split into branches, with each branch having a different path towards resolution).

915 Risk mgt: limitations to project scope

Redefining out-of-scope tasks as EMOnline-wide tasks

Due to limitations of scope and budget, or because a proposed task would benefit all apps, and not just the app that identified the task, individual apps on limited scope and budgets from time to time need to define/redefine tasks as "*EMOnline-wide*", quoted directly out of this parent doc, and not out of that app's budget.

For a rationale for an *EMOnline-wide* "project" (via the current document), where previously the apps drove the platform, including risk management relating to hosting pre-existing apps, see ARCHIVE_100827_2044.

About 'old system' and 'transitional' tools

A major *EMOnline* activity is to upgrade pre-existing standalone files to full *EMOnline* networking and databasing.

This means that until they are signed off as fully networked ("new system") tools, apps at *EMOnline* are called "transitional tools" or, in certain special cases where the tool is earmarked to be superseded, "old system" tools.

- Orgs may from time to time opt, however, in respect of certain tools that are earmarked to be superseded, for partial networking and databasing, and to not keep pace with the fully networked apps.
- This can be 'acceptable' risk in terms of a risk matrix.
- As a strategy, "old system tools" bypass significant upgrade costs, and upgrading is done on an "as needs basis" (testing is done by users "live", and debugged as issues are logged).
- In particular, old system databases (for example, house / client / staff / permissions) are partially linked to *EMOnline*, and so any ongoing changes made in *EMOnline* generally need to be duplicated within the old
- The cost-benefit of this for orgs has been that the costs of this approach (against our own predictions in past years) have been significantly less than if the tools had kept pace with continuous improvement. In short, large savings in past years translates as smaller costs ongoing.
- Special cases. Some interim systems last for an atypically long period of time.

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Competing requirements in a large organisation

Projects for individual projects within a large org frequently need to reject quote items relating to a requirement of another part of that org. Our response to a recent such issue (a data protection audit that a project was ordered to do by its I.T. area, but for which it could not pay) was as follows, an excerpt from ARCHIVE_101007_1450:

"... if information is brought to anyone's attention in relation to sensitive data (in the end, *EMSONline* contains a lot of this), either your end or mine, even in the form of a survey, we have to act on it as soon as it is practicable.

- A yes/no response ... would leave you at your end ... with no option other than to send it back for more info.
- In making me aware of the data protection headings that currently matter to [I.T.] ... no choice but build up my (written) policy, standards, processes and procedures to comply, and then fill in your survey, and fully."

| | |
|--|---|
| 920 Risk mgt: recovery covered by parent program | The current project is the parent project. Recovery plans to be developed in project team meetings. |
| 930 Risk mgt: recovery specific to current project | <p>In regular risk management meetings for the current project, any item not covered by any parent project are documented.</p> <p>Risks are identified in the context of risk matrix (risk level based on likelihood and consequence), risk controls, and recovery plans.</p> |
| 940 Risk mgt: insurances | Insurances with QBE via our brokers Marsh are public liability \$5m, product liability \$5m, professional indemnity \$2m. |
| 950 Risk mgt: confidentiality | <p>All project workers for RosterCoster.com sign a confidentiality agreement.</p> <p>See ARCHIVE_101203_0148, arising from audit of EMSONline by Deloitte: Confidentiality agreements. [The auditor] recommended that we should re-sign confidentiality agreements every year. This is new to us, "once only" has always been our rule. So, I've put it in our calendar that every year on Dec 2 each year, starting ... we will each sign the attached ... N.b. for those of my colleagues with no current access to [confidential] information, I will tell them they can hold off [signing] the attached until they next do. ... This allows us to be covered from today on what we'll call our "annual sign rule", without everyone having to sign something [immediately].</p> |
| 960 Risk mgt: quality control of app designs (incorporating user support systems) | <p><u>Employing internal audits to improve quality</u></p> <p>The <i>TQC App Design Quality Audit Tool</i> allows the project team to document which user support items are included and not excluded. Certain items are identified as compulsory, relating to risks associated with (a) user dissatisfaction for a system associated with our brand, and (b) undue pressure being placed on help desks.</p> <p><u>Employing external audits to improve quality</u></p> <p>An external audit (for example, EMSONline was audited twice in 2010) provides an opportunity for a vendor to augment its quality framework with any new quality assurance items that were not listed in a previous audit.</p> <p>Our standard response, then, to audits is to employ them as an additional quality assurance tools, such that over time, our own systems and processes</p> |

come to capture the content of the combined requirements of multiple audits, thereby exceeding the content of each individual auditor's requirements.

This response also ensures that during the lifetime of a specific audit is completed, we have upgraded (if necessary) all items raised in that audit, allowing the auditor to give us the best possible report.

965 Risk mgt: quality of project management processes

We are experts in project management, and all apps and projects are initiated, planned, controlled, executed and closed within our *EMSPProjects online* project management software. For a demonstration of this software, contact Damien.Ryan@RosterCoster.com, developer of *EMSPProjects*.

970 Risk mgt: testing & debugging process

For upgrades other than miscellaneous adjustments (to be defined in project meetings), all upgrades must be tested and signed off by a person other than the coder.

Typically, testing is carried out on a 'control group' of records that has predictable and known results.

980 Risk mgt: data protection

See also: "Attachment 55: Data protection."

Please note that given orgs are maintaining staff and client details, apps at *EMSONline* are subject to data entry errors with that. The project plan for each app must risk manage that, or recommend changes the the *EMSONline*-wide project. Other items arising:

- See ARCHIVE_100719_1853: handover of data control centre to orgs.
- See ARCHIVE_100805_1437: "... all people with access to the [*EMSONline*] data control centre ... are agreeing to get "phone orientation" ... before proceeding to use it".
- ARCHIVE_100827_1514: The risk management for *EMSONline* "new systems" is that *EMSONline* is provided with the maximum level of data protection permitted by orgs... This does not apply to "old system apps", which for historical reasons, have certain databases saved in Excel format on central group drives.
- See ARCHIVE_101006_1413, 101006 assessment of *EMSONline* of 6 October 2010 relating to formal compliance re data protection.

990 Risk mgt: developer death, injury or inability

See ARCHIVE_101203_0148, arising from audit of *EMSONline*: "[In addition to our own team, provision for Loop software or one of our other business partners ...] being an additional safety net. This would allow for at least five or six coders (so far) being in a position to cover *EMSONline*."

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