

Horizon Release Management

Memorandum

To: Vince Gaskell

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Date: 23 September 1998

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Meeting on 24th September 1999

In addition to the discussion on testing progress we would like to take the opportunity to cover some other points with you at the meeting tomorrow. In part these are a follow-up to the meeting we had with Parry Jenkins at the end of August which provided ourselves and Pathway with more information on the CAPS activities within the Replan. I attach our notes of this meeting. The points we would like to cover are:

- we are still awaiting written confirmation of the contents of the CAPS releases 3.5, 4.0 and 4.5. These are needed for Pathway to confirm their delivery plan in support of multi-benefit and for NR2+. We at least need to agree assumptions if confirmation is not yet possible.
- in particular we have received a note from Colin Galloway indicating that On-line Enquiries will now be in CAPS 3.5 not 4.0 as Parry then believed. We have not received any communication from CAPS however as to whether they require Pathway to bring forward their corresponding facility from NR2+. Is there a proposed change to the required date? Is this based on clearer estimates of the projected rate of Help Desk calls that would otherwise be required?
- Pathway have prepared a CCN offering more free calls to the Help Desk if this would be an acceptable interim solution to the sponsors which would provide more flexibility over when they would need to deploy On-line Enquiries. Is this CCN still relevant?
- we need to confirm with BA/CAPS the specific functional exclusions for multi-benefit processing that will not be included in the Release Authorisation for NR2 Child Benefit only.
- CAPS Seals of Approval are understood to be required for the release authorisation of NR2 with Child Benefit only, although this is a non-CAPS release and will only cover deployment to the POCL live trial offices. Do CAPS have the necessary actions in hand?

It would be helpful if we could agree with you at least the next steps on these points tomorrow.

Andrew Simpkins
Horizon Release Management

PLAN OF ACTIVITIES FOR TESTING REVIEW**ON 6TH OCTOBER 1998**

1. Prepare draft 'terms of reference' for the review	AS	23/9
2. Discuss with Vince Gaskell	DM	24/9
3. Discuss with M.Coombs	DM	25/9
4. Agree data to be supplied by Pathway	DM/MC/SR	25/9
5. Develop detailed agenda/approach	DM/SR/AS	28/9
6. Agree participants with all parties	AS	29/9
7. Agree detailed meeting agenda and presenters	DM/MC/VG	29/9
8. Walkthrough of proposed agenda and contents	DM/MC+ teams	1/10 (A)
9. Review final preparations	Checkpoint Meeting	6/10 am
10. Testing Review Meeting	Horizon/BA/Pathway	6/10 (B)

Notes**A. Meeting 1.30 to 3.30 in Feltham****B. Meeting starts at 1.30 - open ended**

Joint Testing Review Meeting

6th October 1998

Proposed Framework

Purpose: To review testing progress on the POCL Single Benefit Model Office stage and to agree outstanding issues and further actions required.

Note: This meeting is not a forum in which decisions can be made to change dates in the agreed Replan.

Areas to be covered:

1. Progress against plan since June 1998 - Horizon and CAPS
2. Current plans to complete Model Office - Horizon and CAPS
3. Model Office test coverage to date - number of scripts run, passed, failed
4. Pathway System, BIT and Regression test coverage to date
5. Releases into MO cycles - release notices and exclusions
6. Closure reports for MOR1 and E2E cycle 1
7. Fault Status - items raised, cleared and outstanding by cycle (Horizon, and CAPS and Pathway Systems Test/BIT)
8. Fault Status - trend analysis
9. Fault Status - itemisation of current 'severe' faults and impact assessment
10. Fault Status - analysis by functional area
11. Objectives for remaining cycles
12. Issues/risks to be addressed

IS 18TH DECEMBER A REALISTIC DATE ?

RESPONSE TO CONCERNS

1. Pathway's Track Record is not Credible

Pathway clearly have had a history of failure on the Programme. Since April 1998 the position has changed. Although BA/CAPS have cast doubts in advance of every significant Horizon testing milestone since this date they have all been consistently achieved i.e

- start of DIT2 on schedule (Direct Interface Testing)
- end of DIT2 on schedule
- environment available to support JSA Model Office on 8 June
- Horizon Model Office started 3 August
- MOR1 finished ahead of schedule on 27 August when BA claimed a multi-benefit MOR1 would take 4 (four) times as long
- E2E finished on schedule including multi-benefit testing when BA claimed it would take twice as long
- MOR2 has started on time with CAPS

BA must recognise the recent good progress and not only refer to the difficulties experienced under the PDA.

2. What do the 'Experts' Advise ?

DSS/BA have many years experience of large systems implementation, and believe the 18th December is risky. But they do not have full visibility of testing activity and they lack the 'inside information' available to Pathway as the supplier.

From Horizon's formal and informal contacts with the senior technical managers in Pathway, who have the best informed view of progress, we know that they believe the 18th December date is achievable. This does not mean it is guaranteed. But so far there is no evidence of any compelling nature which would cause them to change this view.

We believe the evidence arising from our close contact with Pathway is of more substance than the more remote assessments of BA senior management.

3. Is the Plan Realistic ?

Pathway re-baselined their plan for the Model Office phase on 11 September. The plan therefore now covers a period only slightly more than 3 months, and takes into account more than 6 months of testing experience to date. The margin for error is now significantly less than it was when the 18th December date was first set in May. If all the Pathway activities could not be synchronised around the 18th December it would have come out in this new baseline.

The overall plan provides a contingency period of up to 4 weeks more testing in January. This is a high level of contingency (30%) given the remaining planned test period.

4. Analysis of Testing Errors ('pinnacles')

BA have placed much emphasis on this area and it is clearly a critical measure. A comprehensive analysis of experience to date will be presented at the meeting on 6th October. It will also be necessary however to take into account the full picture of testing progress which should include:

- analysis of the percentage of test scripts run in Model Office and the success rate (which were on target in the first cycle)
- a similar analysis for Pathway's internal system test environment
- ability to run the remaining test cycles within the planned periods (for which good evidence has now been obtained in the completion of the first cycles on schedule)
- the completeness of functionality in the delivered system (no hangouts are expected to remain by 12th October)
- assessment of Pathway's 'fast track' capability to correct and retest any errors found late in the testing programme.

We intend that the meeting on 6th October will form a balanced judgement on all these aspects.

5. Other Factors

Two other key factors have to be taken into account in managing this test phase:

- BA and POCL do not have the contractual right to tell Pathway to extend the testing period which would be interpreted as causing a delay. Their sanction is to decline the quality of the system submitted for release authorisation into live running.
- The goal of this testing phase is to achieve release authorisation for the live trial in 300 post offices for the period January to June 1999. While the system has to be adequate for live use the overall 'quality hurdle' for the live trial does not have to be quite as high as for the national rollout in July 1999. There are a further 6 months during the trial period when any outstanding non-critical technical and functional problems can be addressed as well as the new problems that can be expected to emerge in the trial. The judgement to proceed with release into live trial on 18th December must reflect some commercial realism of the risks involved and not be based on an idealistic standard of 'no errors'.

Horizon Release Management
23rd September 1998