



DATA MANAGEMENT STEERING COMMITTEE

THURSDAY, AUGUST 18, 2011

9:30 A.M. – 12:00 P.M.

CONFERENCE CALL #: (888) 850-4523 pin # for Participants: 769638
pin # for AOC: 7696380

AOC Conf. Room: Wynoochee, Bldg. 1, Floor 2, Rm #227

**This will be an online meeting.*

AGENDA

1) Call to order

- a) Introductions
- b) Approval of April 21, 2011 minutes
- c) Review action items

2) Enterprise Data Warehouse Update

- a) EDW Monthly status report
- b) Accounting project update

3) Data Exchange Update

- a) VRV DX status update
- b) RMS Project Update
- c) Superior Court DX

4) Next Steps / Motions / Decisions

5) Future Meetings

- September 15, 2011 9:30 a.m. – 12:00 p.m., Conference Call
- October 20, 2011 9:30 a.m. – 12:00 p.m., Conference Call
- November 17, 2011 9:30 a.m. – 12:00 p.m., Conference Call

Attachments

April 21, 2011 Draft Minutes

Enterprise Data Warehouse Monthly Status Report

Accounting Project Charter

Accounting Project Team Roster

Accounting Project Work Breakdown Structure

Vehicle Related Violations DX Monthly Status Report

Superior Court DX Monthly Status Report



WASHINGTON
COURTS

DATA MANAGEMENT STEERING COMMITTEE (DMSC)

THURSDAY, APRIL 21, 2011

9:30 A.M. TO 11:10 A.M.

CONFERENCE CALL #: (888) 850-4523 AND ADOBE CONNECT WEB MEETING

AOC Conf. Room: Crystal, Bldg. 2, Floor 2, Rm #209

DRAFT MEETING MINUTES

Members and Alternates Present: Rich Johnson, Chair, Larry Barker, William Holmes, Lynne Jacobs, Frank Maiocco, Barb Miner, Judge Brian Tollefson, and Jenni Christopher (for Carl McCurley).

AOC Staff: Jennifer Creighton, Bill Burke, Mike Walsh, Pam Payne, and Kathie Smalley.

Call to Order

Rich Johnson called the meeting to order. As to the March 17, 2011 minutes, it was agreed to add an Action Item to the Superior Court Data Exchange section stating that Barb Miner had been tasked with identifying someone to the SCDX project work group.

The March 17, 2011 Data Management Steering Committee Meeting Minutes were approved, as amended.

Previous Action Items Review

- Jennifer Creighton worked with Sarah Veele-Brice from AOC's Research (WSCCR) Division to write an update to the definition of the PACT project, which is now included in the Enterprise Data Warehouse Monthly Status Report.
- Barb Miner sent a request to Lea Ennis of King County to assist in the SCDX work group, and reported that Lea had agreed to be included in that project.
- Bill Burke sent the Inventory of Services (58) list to the DMSC on April 7, 2011.

Enterprise Data Warehouse Update – Jennifer Creighton

EDW Monthly Project Status Report

The project team continues to spend most of their time working on the PACT Juvenile Risk Assessment Tool, currently receiving data from Assessments.com and loading the information into development in order to begin creating the user interface and some of the reports.

An AOC staff member attended the Juvenile Court Administrators' conference in May and presented a demonstration of PACT and what it would look like in the data mart. Attendees were receptive and liked what they saw. William Holmes commented that he was pleased with the AOC's efforts because it assisted juvenile courts in getting funding from the Legislature for their programs.

The scheduled date to begin work on the Accounting project is August 2011. Ms. Creighton planned to contact the original project work group in June or July to garner willingness to assist on the implementation work group. **ACTION ITEM:** Rich Johnson suggested sending the names of the original work group to the DMSC members for review and for them to determine their needs, as required, to represent their particular constituencies. Barb Miner offered a couple of her staff to operate on a consulting basis to the EDW team, if needed.

Data Exchange Update

Vehicle Related Violations (VRV) Data Exchange Status Update – Mike Walsh

Mr. Walsh reported that the DIS JINDEX Records Management System (RMS) project continues to hold up the VRV Data Exchange project. The good news is an implementation target date of May 2011 has been set, which means the VRV can look forward to its first rollout of the Tier 1 on boarding courts currently scheduled for August 2011. The DIS JINDEX strategy is to alternate a VRV rollout with a RMS rollout. This would position the VRV Tier 2 courts (Tacoma, Lynnwood, and Fife) for an October 2011 target date.

AOC met on April 14 with Issaquah, Kirkland, and Lakewood and their IT departments to engage in working towards meeting the August date for on-boarding. At the meeting, the group reviewed the changes to the portal, how to utilize the portal to identify court needs from both the business and technical perspectives, and the courts' need to start engaging their own teams and build their project plans. There will be bi-monthly stand-up meetings to collaborate on the various court projects and to offer assistance, as needed. Everett Court, the initial Pilot court, is currently submitting tickets through the VRV Data Exchange. They have been instrumental in sharing their experience and providing content to the portal for other courts to use as a guideline for creating their own on data exchange planning.

Tier 1 and Tier 2 on boarding courts will be completed October 31. Following the pilot phase, the VRV Data Exchange will be handled by AOC Operations. Mr. Johnson asked for a timeframe to engage the Tier 2 courts (Lynnwood, Tacoma, and Fife) and Mr. Walsh responded that the strategy is to get the first three courts on board and to look at commonalities found and separate that work from what are the integration needs specific for each court.

Superior Court Data Exchange (SCDX) Status Update – Bill Burke

There was brief discussion about the role of the DMSC and the need to establish a DMSC Superior Court Data Exchange (SCDX) Working Group to review SCDX project plans and deliverables. Mr. Burke requested Court review of the Business Capability documents for each SCDX Service to ensure that the service meets the Court's data exchange needs. Mr. Burke stated that if the current planned set of SCDX Services are insufficient, that additional SCDX Services could be developed as a separate Production Increment, once the current project scope has been completed. Additional SCDX project funding would be required for implementing any additional SCDX Services. The current SCDX project scope was developed to meet the needs of Pierce County to interface their LINX System to the AOC SCOMIS and JIS Systems.

Both Judge Tollefson and Frank Maiocco stated they would be willing to be a part of this work group effort.

The project scope will deploy a data exchange that can be used by all local superior court systems, and is currently scoped to provide 58 web-enabled services that will be implemented via a data push/pull method. The AOC is drafting a Request for Proposal (RFP) to select a vendor to do this development work. The goal is to ensure that the SCDX is usable and extendable for future AOC projects that will implement the JIS Future State Architecture.

At the request of Mr. Johnson, Mr. Burke provided a detailed explanation to the committee as to how the project was originally scoped and why the current approach was chosen. He added that the current project scope and plan going forward was the right path to take.

The SCDX project released a Request for Qualification and Quote (RFQQ) to select a web-messaging expert. The AOC evaluation team selected Soos Creek Consulting as the winning vendor. Their consultant will begin work with the SCDX project starting April 25.

Mr. Burke reviewed the project schedule template and a draft project schedule (not published), noting that the vendor would produce their own schedule once onboard, but the AOC believes this project can be implemented in approximately 12-14 months. AOC plans to have the RFP for a vendor to perform project development released by May 5. Contract signing would occur in the June timeframe, with work slated to begin on July 1.

ACTION ITEM: Mr. Burke agreed to add a DMSC representative on the SCDX proposal evaluation team and will send a communication to the committee regarding the particular skill set that would be most effective in this effort. The selected DMSC representative on this evaluation team will need to commit a week (week of May 23) to this evaluation.

ACTION ITEM: Mr. Burke will establish an SCDX website accessible via Inside Courts, similar to what the Superior Court Management Feasibility Study (SCMFS) project has developed. The SCDX website will be used for posting SCDX project documentation for DMSC review.

The SCDX Work Group needs to be formed prior to the next DMSC meeting on May 19. Frank Maiocco will give an update on the status of the DMSC at the next Superior Court Administrators Annual Conference and will solicit for work group participation.

ACTION ITEM: The DMSC members agreed to provide the list of names for participation in the SCDX Work Group to Mr. Burke by May 6.

The committee liked using the Adobe Connect product for the meeting, and discussed its continued use for future conference call meetings.

Next Steps / Open Action Items / Decisions

- o Jennifer Creighton will send the list of the previous Accounting Project work group members to DMSC members for review and match up with skill sets for the implementation work group.
- o Bill Burke will establish a SCDX website accessible from the Inside Washington Courts for posting SCDX documentation.
- o Bill Burke will communicate with DMSC members on skill sets desired for evaluating the development contractor RFP proposals.
- o DMSC members will provide a list of names for the SCDX Work Group to Bill Burke by May 6.

The meeting adjourned 11:10 a.m.

Future Meetings

- May 19, 2011, 9:30 a.m. – 12:00 p.m., TBD

Reporting Period: July 1st – July 31st 2011

Operational Area: Data Management

Jennifer Creighton, Data Management Manager

Includes: Database Unit, Development Unit, Data Warehouse Unit

Description: *The Data Management Section is comprised of three separate units:*

Data Warehouse Unit: The enterprise data warehouse is a repository of historical information that allows courts to query data for managerial and historical reporting. Case and person data is consolidated from SCOMIS, JIS, ACORDS, and JCS for reporting across all court levels. Court specific data marts provide users the ability to query information by specific court level. The information in the warehouse is accessed using a query tool called Business Objects XI (AKA BOXI). The ability to run queries and reports on historical information on court data provides business intelligence and insight into patterns, trends, issues and gaps in that data that can be used for research analysis, improvement of business functions, risk assessment and other business needs. Reports from the enterprise data warehouse can be run on demand or scheduled on a preset basis and the output can be sent to the desktop, or sent to an email address or a file folder making the information easy to share and obtain.

Development Unit: The development team is tasked with staffing active projects. They complete requirements analysis, coding, unit testing, and implementation to production of new applications. Work performed by the Development Unit is reported separately under the project(s) to which the staff is currently assigned.

Database Unit: The database unit provides a support role to the data warehouse team, the development team, and the operations section (legacy maintenance). They are responsible for reviewing and approving the design of underlying table structures, creating indices to improve performance, maintaining data dictionaries, providing review of proposed changes and additions to the database tables, and creating standards for the creation and maintenance of the databases.

Data Management Team: The data management team is comprised of individuals from each of the three units in the Data Management section. They have the responsibility of managing data from an enterprise perspective, including data quality and tracking compliance to data policies. Their activities are reported separately rather than repeating the work for each specific unit.

Activities Completed this Reporting Period	Impact/Value
Data Warehouse Unit	
<ul style="list-style-type: none"> ◦ PACT: completed development of the Assessment Questions and Assessment Statistics report; 	The juvenile courts have a rich database of criminogenic information on juvenile offenders. The PACT implementation gives the courts the ability to conduct real time queries on this data allowing them to better understand the needs of the youth they serve, more efficiently determine where to allocate resources, and continue to provide the most effective evidence based programs.
<ul style="list-style-type: none"> ◦ Maintenance activities included: <ul style="list-style-type: none"> • Updating for legislative changes to cause codes which impacted the superior court caseload reports (HB 1267); • Quarterly run of Washington State Institute for Public Policy data dumps; • COA time in process reporting • 	Continual maintenance of the data warehouse improves response times, increases functionality of the warehouse, maintains the integrity of the data, and ensures the latest versions of related software are implemented.
<ul style="list-style-type: none"> ◦ Accounting Project: continued design specifications; loaded data to the development environment; 	Adding accounting information to the data warehouse will provide: <ol style="list-style-type: none"> 1. Better tracking of accounting information 2. Budget and revenue forecasting

	<p>3. Audit and operational reports 4. Ability to answer inquiries from other agencies</p>
<ul style="list-style-type: none"> Responded to requests for reports from the courts and data dissemination requests, including felon voter registration report; attorney email addresses for King County; mental health reports for the Joint Legislative Audit and Review Committee (JLARC). 	<p>Completing requests for information assists the courts in being more efficient in their work, aids research into a variety of issues by WSCCR and outside research organizations, provides information to the legislature in their work to craft bills, and provides the courts and AOC with information regarding the efficiency and effectiveness of the judicial process.</p>
<u>Database Unit</u>	
<ul style="list-style-type: none"> Completed data base design review requests. 	<p>The work of the database unit supports the ongoing maintenance and improvement of the courts' applications (JIS, SCOMIS, ACORDS, JABS, e-ticketing, etc.)</p>
<u>Data Management Team</u>	
<ul style="list-style-type: none"> Continued planning for the Information Network Hub (INH) project, including potential impacts on data warehouse. 	<p>The INH project will stand up the architecture designed to support the exchange of data between the existing databases and any databases a new, purchased application will bring.</p>

Activities Planned for Next Reporting Period	Impact/Value
<u>Data Warehouse Unit</u>	
<ul style="list-style-type: none"> PACT: updates to universe to allow additional reporting; user testing; user acceptance testing of Assessment Questions and Assessment Statistics Report 	<p>The juvenile courts have a rich database of criminogenic information on juvenile offenders. The PACT implementation gives the courts the ability to conduct real time queries on this data allowing them to better understand the needs of the youth they serve, more efficiently determine where to allocate resources, and continue to provide the most effective evidence based programs.</p>
<ul style="list-style-type: none"> Maintenance activities. 	<p>Continual maintenance of the data warehouse improves response times, increases functionality of the warehouse, maintains the integrity of the data, and ensures the latest versions of related software are implemented.</p>
<ul style="list-style-type: none"> Accounting Project: begin documentation of business requirements; begin coding ETL mappings; 	<p>Adding accounting information to the data warehouse will provide:</p> <ol style="list-style-type: none"> Better tracking of accounting information Budget and revenue forecasting Audit and operational reports Ability to answer inquiries from other agencies
<ul style="list-style-type: none"> Respond to data dissemination requests. 	<p>Completing requests for information assists the courts in being more efficient in their work, aids research into a variety of issues by WSCCR and outside research organizations, provides information to the legislature in their work to craft bills, and provides the courts and AOC with information regarding the efficiency and effectiveness of the judicial process.</p>
<u>Database Unit</u>	
<ul style="list-style-type: none"> Support data base design review requests. 	<p>The work of the database unit supports the ongoing maintenance and improvement of the courts' applications (JIS, SCOMIS, ACORDS, JABS, e-ticketing, etc.)</p>
<u>Data Management Team</u>	

<ul style="list-style-type: none">◦ Continue work on the INH project.	The INH project will stand up the architecture designed to support the exchange of data between the existing databases and any databases a new, purchased application will bring.
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Project Charter

ITG 009: Add Accounting Information to the Data Warehouse

Authored By: Jennifer Creighton

Date: 08/02/2011

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Document History

Author	Version	Date	Comments
J Creighton	1.0	8/2/2011	Initial draft

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A. General Information

Project Name:	Add Accounting Information to the Data Warehouse	Creation Date:	August 2, 2011
Controlling Agency:	AOC – ISD	Revision Date:	
Prepared by:	Jennifer Creighton	Authorized by:	ITG 009
Project Manager:	Wendy Loewen		

Key Stakeholders:

- Data Management Steering Committee
- Superior Courts
- Courts of Limited Jurisdiction
- Accounting Project Work Group
- AOC – Management Services Division
- AOC – Judicial Services Division

B. Project Executive Summary

This project is a result of the approval and prioritization of [IT Governance request 009 \(ITG 09\)](#). This request identified eleven reports that are either unworkable in the mainframe format or are new reports to be created. These reports will give the courts better tracking of accounting information, better budget and revenue forecasting, new or improved audit and operational reports, and the ability to answer accounting inquiries from other agencies.

This is a multi-court level request, bringing value to both the Superior Courts and to the Courts of Limited Jurisdiction.

C. Project Overview

The addition of accounting information to the data warehouse was originally requested when the current data warehouse was implemented in 2008. Project schedules and resources at that time precluded its inclusion. The business problems prompting the request still exist:

- Although the data is available, current reporting facilities in JIS do not meet the business needs of the courts.
 - Many accounting reports are time sensitive as to when they must be run; if not run on a designated date (such as last day of the quarter), the point in time data is lost and cannot be recreated.
 - Many large courts cannot run reports as they are a tremendous resource drain on the system while they are being run. The reports regularly fail, resulting in lost data, and the resource drain degrades response time for users.
- Other reports are simply not available, for example, remittance summary by A/R or a listing of checks voided during the month.
- The JIS reports currently available to the users do not adequately provide accounting data essential for statistical analysis which is frequently being requested.
- Financial reports are lacking important information, and are based upon estimates when Generally Accepted Accounting Standards require actual, and auditable figures.

For these reasons, an IT Governance request was sent through the multi-court level user group to the JISC, requesting the addition of accounting information and reporting capabilities in the

data warehouse. The request was approved and prioritized by the JISC. This project is the end result of that request.

D. Project Objectives

This project will meet the following objectives:

- Transition seven reports from the mainframe to the data warehouse, allowing them to be run without the current time constraints they currently are under;
- Create four new reports to answer additional business needs at the courts;
- Make all the information available on mainframe accounting screens available in report format (either through one of the eleven reports already identified or through up to five additional reports);
- Set the technical stage for a second phase which will allow ad hoc queries to be run against an accounting data mart.

Project Success Criteria

- All eleven reports (new and transitioned) pass user acceptance testing and are implemented in production;
- Each report is completed within the time frame estimated for it to be done.
- A second phase, to implement ad hoc queries, has been analyzed and work effort estimated. This will enable the work group to submit an ITG request for phase II, if they so desire.

E. Project Scope

The scope of this project includes and excludes the following items:

1. In Scope

- Reports to transition
 - Detail and summary accounts receivable reports
 - By account receivable type code
 - By billing status (billed or paid)
 - Payment monitoring report
 - Cases with accounts receivable paid in full
 - Remittance summary by BARS code
 - Limited to obligations

- Monthly interest accruals associated with accounts receivable type codes
- New reports
 - Legal financial obligation report
 - Cases with finding date and accounts receivable in potential status
 - Accounts receivable balancy by type and payment aging
 - Collection reports for parking cases
- Present data from following mainframe screens, either through one of the previously defined reports or through up to five additional reports
 - Create Accounts Receivable (CAR)
 - Case Obligation Status (COS)
 - Case Financial History – Accounts Receivable (CFHA)
 - Adjustments (CFHJ)
 - Receipts and Receipt Detail (CFHR)
- Updated online documentation to support transitioned and new reports

2. Out of Scope

- Ad hoc query capabilities in the accounting data mart
- Any reports or screens not listed above
- Classroom or web based training

3. Deliverables Produced

- Detail and summary accounts receiveable by account receivable type code
- Detail and summary accounts receivable by billing status
- Payment monitoring report
- Cases with accounts receivable paid in full
- Remittance summary by BARS code
- Limited to obligations
- Monthly interest accruals associated with accounts receivable type codes
- Legal financial obligation report
- Cases with finding date and accounts receivable in potential status
- Accounts receivable balancy by type and payment aging
- Collection reports for parking cases

4. Acceptance Criteria

- Transitioned reports
 - Output matches output of currently existing JIS reports
 - Passed user acceptance testing
- New reports
 - Output verified through use of queries run against DB2 tables
 - Passed user acceptance testing

5. Organizations Affected or Impacted

Organization	How Are They Affected or How are They Participating?
Judicial Information Systems Committee (JISC)	Authorized and prioritized the project; oversight of funds and resources expended
Data Management Steering Committee (DMSC)	Project oversight
Washington State Association of County Clerks (WSACC)	End users of the accounting data mart
District and Municipal Courts Management Association (DMCMA)	End users of the accounting data mart
AOC Management Services Division (MSD)	Work with the courts on accounting issues; may be end users of the accounting data mart
AOC Judicial Services Division (JSD)	Work with the courts on accounting issues; may be end users of the accounting data mart

F. Project Estimated Effort/Duration

1. Estimated Effort Hours

AOC Group	Hours	Tasks
Court Education	200	Communication, documentation
Data Architect	32	Database design review of 10 tables in operational data store (ODS) and statewide data repository
Database Administrator (SQL)	55	Building and loading ODS objects and overall system performance testing
Maintenance (JIS)	800	Support data warehouse staff in analyzing current system and data
MSD Fiscal	75	Contributing to requirements and SME
Data Warehouse	3113	Analysis, design, coding, testing, report development, implementation
Quality Assurance	150	Testing of reports
Project Management	800	1/3rd FTE for length of project
TOTAL	5225	+/- 20%

2. Estimated Duration

Milestone	Date Completed	Deliverable(s) Completed
Project Planning	09/13/2011	<ul style="list-style-type: none"> Project Charter Schedule Communications Plan
Rreport names will be added after they are prioritized by work group.	Dates will be added after the reports are prioritized.	<ul style="list-style-type: none"> Requirements specification document Test plan and results User acceptance results Report implemented in production
Report 2	mm/dd/yy	<ul style="list-style-type: none"> Requirements specification document Test plan and results User acceptance results Report implemented in production
Report 3	mm/dd/yy	<ul style="list-style-type: none"> Requirements specification document Test plan and results User acceptance results Report implemented in production
Report 4	mm/dd/yy	<ul style="list-style-type: none"> Requirements specification document Test plan and results User acceptance results Report implemented in production
Report 5	mm/dd/yy	<ul style="list-style-type: none"> Requirements specification document Test plan and results User acceptance results Report implemented in production
Report 6	mm/dd/yy	<ul style="list-style-type: none"> Requirements specification document Test plan and results User acceptance results Report implemented in production
Report 7	mm/dd/yy	<ul style="list-style-type: none"> Requirements specification document Test plan and results User acceptance results Report implemented in production
Report 8	mm/dd/yy	<ul style="list-style-type: none"> Requirements specification document Test plan and results User acceptance results Report implemented in production
Report 9	mm/dd/yy	<ul style="list-style-type: none"> Requirements specification document Test plan and results User acceptance results Report implemented in production
Report 10	mm/dd/yy	<ul style="list-style-type: none"> Requirements specification document Test plan and results User acceptance results Report implemented in production

Report 11	mm/dd/yy	<ul style="list-style-type: none"> Requirements specification document Test plan and results User acceptance results Report implemented in production
Project Conclusion	01/31/2013	<ul style="list-style-type: none"> Project Closeout Report Lessons Learned

G. Project Assumptions

Certain assumptions and premises need to be made to identify and estimate the required tasks and timing for the project. Based on the current knowledge today, the project assumptions are listed below. If an assumption is invalidated at a later date, then the activities and estimates in the project plan should be adjusted accordingly.

- ISD resources will be available for the time and duration they are scheduled
- Work group members will fully participate in requirements gathering and user acceptance testing
- Reports designated with equal business priority will be completed based on technical priority

H. Project Risks

Risk Area	Level)	Risk Plan
1. Length of project	High	Phased implementation of reports in priority order
2. Lack of understanding around accounting data by data warehouse team	Medium	Inclusion of JIS legacy developers on project team for knowledge transfer

I. Project Constraints

- Work group members are court staff who have other time commitments. Scheduling around them will be done as much as possible, but some work group meetings may need to proceed without all members or be postponed until all are available.
- Other project commitments for non-core project staff will constrain opportunities for knowledge transfer.

J. Project Authority

1. Funding Authority

Judicial Information Systems Committee (JISC)

2. Project Oversight Authority

Data Management Steering Committee (DMSC)

K. Project Organization / Project Management Structure

An appropriate project organization structure is essential to achieve success. The following list depicts the proposed organization:

1. Project Team

Project Executive Sponsor: JISC

Project Sponsor: DMSC

Project Manager: Wendy Loewen

Data Warehouse Manager: Jennifer Creighton

Project Advisors:

Aimee Vance, Kirkland Municipal Court Administrator

Cynthia Marr, Pierce District Court

Ela Selga, Clark District Court Administrator

Eva Heitzman, Yakima District Court

Joel McAllister, King County Clerk's Office

Kim Eaton, Yakima County Clerk

Kim Morrison, Chelan County Clerk

Paula Davis, Yakima District Court

Sandy Ervin, Okanogan District Court Administrator

Sharon Vance, Skamania County Clerk

Tari Cook, Yakima District Court

Tawni Sharp, Thurston County Clerk's Office

Tricia Kinlow, Tukwila Municipal Court Administrator

Technical Team Members:

AJ Yates, report development

Charlene Allen, report development

Cheree Dossier, AOC accounting SME

Heidi Chu, data base administrator

Janice Winn, AOC accounting SME

Jon Bell, ETL development

Rhonda Rankin, JIS accounting developer

Tariq Rathore, data base architect

Tom Schuettke, data base administrator

Tracy Wheeler, ETL development

Yun Bauer, report development

2. Roles and Responsibilities

Role	Time Commitment	Responsible for
All	<ul style="list-style-type: none">Varies	<ul style="list-style-type: none">Completing assigned tasks on timeRaising issues immediately to project manager, data warehouse manager or project sponsor

Role	Time Commitment	Responsible for
Project Sponsor	<ul style="list-style-type: none"> • Varies 	<ul style="list-style-type: none"> • Has ultimate authority over and is responsible for the project • Approves changes to project scope • Provides overall vision and direction for the project • Resolves issues requiring management attention • Approving completion of out-of-scope activities and budgets
Project Manager	<ul style="list-style-type: none"> • 30% time • Attends key sessions and status meetings 	<ul style="list-style-type: none"> • Providing overall leadership oversight to program/project • Vendor management and oversight • Managing personnel and related issues • Defining scope and approving work plans • Reviewing and approving milestone deliverables • Ensuring that schedules and activities are coordinated within the programs and that dependencies are identified, communicated to involved parties, and efficiently managed • Managing budgets • Procuring/creating/managing contracts; recommending policy directives to senior management
Data Warehouse Manager	<ul style="list-style-type: none"> • 60% time • Attends key sessions and status meetings 	<ul style="list-style-type: none"> • Provides day-to-day project guidance • Approves project deliverables • Communicating with stakeholders • Preparing project plan/schedules • Documenting changes to scope, risks, assumptions • Documenting and managing impediments and blocking issues to closure and resolution • Daily coordination of AOC project team staffing and resources across vendors and courts • Daily coordination of deliverables • Directing and managing workload • Making decisions to keep the project on budget and on time • Working with AOC to define and enforce project standards and scope management • Daily coordination of issue management and resolution process

Role	Time Commitment	Responsible for
Project Advisors	<ul style="list-style-type: none"> As needed Attend requirements gathering sessions Participate in user acceptance testing 	<ul style="list-style-type: none"> Clarifying business and functional requirements Performing assessments and reviews Communicating with respective professional organization and court level staff Representing all user viewpoints Participating in as-needed communication, work sessions, and reviews for input/feedback Participating in user acceptance testing
Technical Team	<ul style="list-style-type: none"> Full time Attend key sessions and status meetings 	<ul style="list-style-type: none"> Creating system/technical level requirements Clarifying system/technical requirements Developing project deliverables Performing assessments and reviews Participating in as needed communication, work sessions, and reviews for input/feedback Representing all AOC ISD technical viewpoints Participating in quality assurance and unit testing

3. Project Management Structure

Project meetings

Project advisors – bi-monthly requirements gathering and report review

Technical team – weekly status meetings

Project status reporting

Monthly to JISC and DMSC

Bi-weekly to ISD management

L. Signatures

Title	Name	Signature	Date
Project Sponsor	Rich Johnson, DMSC Chair		
AOC Standards and Policies Manager	Mike Davis		
AOC Project Manager	Wendy Loewen		
Data Warehouse Manager	Jennifer Creighton		
Accounting Work Group Lead			

ITG 09 Team Roster		
ISD Sponsor		
DMSC	richard.johnson@courts.wa.gov	Chair, Data Management Steering Committee
Project Manager		
Wendy Loewen	wendy.loewen@courts.wa.gov	PM
Jennifer Creighton	jennifer.creighton@courts.wa.gov	
Subject Matter Experts		
Eva Heitzman	eva.heizman@co.yakima.wa.us	Yakima District Court
Tari Cook	tari.cook@co.yakima.wa.us	Yakima District Court
Paula Davis	paula.davis@co.yakima.wa.us	Yakima District Court
Joel McAllister	joel.mcallister@kingcounty.gov	King County Clerk's Office
Kim Eaton	kim.eaton@co.yakima.wa.us	Yakima County Clerk
Sharon Vance	vance@co.skamania.wa.us	Skamania County Clerk
Tawni Sharp	sharpt@co.thurston.wa.us	Thurston County Clerk's Office
Kim Morrison	kim.morrison@co.chelan.wa.us	Chelan County Clerk
Cynthia Marr	cmarr@co.pierce.wa.us	Pierce District Court
Aimee Vance	avance@kirklandwa.gov	Kirkland Municipal Court Administrator
Ela Selga	ela.selga@clark.wa.gov	Clark District Court Administrator
Tricia Kinlow	tkinlow@ci.tukwila.wa.us	Tukwila Municipal Court Administrator
Sandy Ervin	servin@co.okanogan.wa.us	Okanogan District Court Administrator
Technical Matter Experts		
Tracy Wheeler	tracy.wheeler@courts.wa.gov	ETL development
Jon Bell	jon.bell@courts.wa.gov	ETL development
Yun Bauer	yun.bauer@courts.wa.gov	report development
Charlene Allen	charlene.allen@courts.wa.gov	report development
AJ Yates	aj.yates@courts.wa.gov	report development
Cherree Dosser	cherree.dosser@courts.wa.gov	AOC accounting SME
Janice Winn	janice.winn@courts.wa.gov	AOC accounting SME
Rhonda Rankin	rhonda.rankin@courts.wa.gov	JIS accounting developer
Tom Schuettke	tom.schuettke@courts.wa.gov	data base administrator
Heidi Chu	heidi.chu@courts.wa.gov	data base administrator
Tariq Rathore	tariq.rathore@courts.wa.gov	data base architect
TDB		QA/tester
Rebecca Grauman	rebecca.grauman@courts.wa.gov	JIS accounting developer

Project Name: ITG 09 - Accounting in the Data Warehouse

Activities		Role Required	Estimated Effort
Planning			
Project Charter		PM	42
Kick off meeting		All	8
Operational Data Store	move data from production to staging		
add 44 new tables to ER Studio		ETL developer; DB architect	26
present to review committee for approval		ETL developer; DB architect	8
add staging tables to change data capture (CDC)		ETL developer; DB administrator	1
create CDC views		DB administrator	46
create prod to staging mappings		ETL developer	353
testing		ETL developer	160
Statewide data repository	move data from staging to warehouse	Report development is dependent on SDR, but it does not have to be entirely complete before reports can start.	
Design 35 new tables		ETL developer; DB architect	240
Changes to universes		ETL developer; report developer	200
add new tables to ER Studio		ETL developer; DB architect	22
present to review committee for approval		ETL developer; DB architect	8
create staging to warehouse mappings		ETL developer	1401
ETL testing		ETL developer	160
Report development		Report development through deployment will be iterative, cycling 11 times through the process until all reports are complete.	
Review report logic and gather requirements analysis and design		work group; ETL developer; report developer; JIS accounting developer	$11 * 71 = 781$
user interface modifications		report developer	$11 * 35 = 385$
data mart implementation		report developer	192
Report development		report developer	$11 * 35 = 385$
universe and report testing		report developer	$11 * 35 = 385$
universe and report testing		report developer	768
QA			
universe testing		QA tester	40
report verification		QA tester	$11 * 10 = 110$
user acceptance testing		work group	$11 * 3 * 13 = 429$
Deployment			
create supporting documentation		report developer; JIS-Ed	$11 * 8 = 88$
deploy reports to production		report developer	$11 * 4 = 44$

MONTHLY ISD REPORT

Approved Project: Vehicle Related Violations (VRVDX) Operational Readiness	Reporting Period: July 1 – 31, 2011
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Executive Sponsor(s) Data Management Steering Committee Rich Johnson, Chair of Committee	IT Project Manager: Michael.walsh@courts.wa.gov 360-705-5245 Consultant/Contracting Firm: NA
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Description: Vehicle Related Violations (VRV) was designed to automate the input and submittal of parking violations as received by local courts through local law enforcement agencies (LEAs). The VRV website provides a service for jurisdictions to get access to the technical information and data needed for them to setup and build data exchanges for use on the jurisdictions' side. The AOC has successfully implemented the VRV DX solution with Everett Municipal Court and is now preparing to execute the final two planning steps required before making VRV broadly available statewide. The final steps include collaborating with the Department of Information Services (DIS) to finalize the on-boarding steps required for LEA to send messages to DIS' messaging service which will in turn communicate with the AOC VRV services to consume the messages and process the tickets. The final step is to extend the pilot program to six additional municipal courts (Lakewood, Issaquah, Kirkland, Tacoma, Lynnwood, and Fife) prior to turnover for ongoing support and maintenance.

Business Benefits: The VRV Operational Readiness Project will prepare a solution for extended pilot use and eventual statewide implementation. The ongoing work will improve performance for the VRV pilot application with the goal of handling anticipated workload and transaction capacity, perform infrastructure cleanup and ensure optimal environment configuration for ongoing support and maintenance. The Customer Website for Data Services is ready for the extended pilot.

Business Drivers (place x in box)	Improve Decision Making <input type="checkbox"/>	Improve Information Access <input checked="" type="checkbox"/>	Improve Service or efficiency <input type="checkbox"/>	Manage Risks <input type="checkbox"/>
	Maintain the business <input type="checkbox"/>	Manage the costs <input type="checkbox"/>	Increase organizational capability <input checked="" type="checkbox"/>	Regulatory compliance or mandate <input type="checkbox"/>

JISC Approved Budget	Allocated (thru July 31st 2010)	Actual
	\$ 0.00 (Budget will be pulled from MSD)	\$0.00 (Budget will be pulled from MSD)

Current Status	Scope	●	Schedule	▲	Budget	●
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Status Notes: Tier 1 teams (Lakewood, Issaquah, and Kirkland) are fully engaged in their development efforts. The DIS assessment documents have been submitted and DIS is preparing to receive the courts into their testing process and release schedule.

Next steps for the courts will be to test the VRV web services for end-to-end processing.

Tier 2 on-boarding partners (Tacoma, Fife, and Lynnwood) are tentatively planned for October 2011. Tacoma and Fife utilize the same vendor solution as Lakewood (RedFlex). Lynnwood uses the same vendor solution as Issaquah (ATS). Tier 2 partners are expected to leverage the work being done during the Tier 1 integration projects to accelerate their project integration efforts.

Progress (Update progress in % and fill in bar)	July - 50 % 	100%
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MONTHLY ISD REPORT

Project Phase (place x in box)	<input type="checkbox"/> Initiate	<input type="checkbox"/> Planning	<input checked="" type="checkbox"/> Execute	<input type="checkbox"/> Close
Schedule (use JISC approved plan dates if avail)	Planned Start Date: 3/22/2010		Planned Completion Date: 11/30/2011	
	Actual Start Date: 3/24/2010		Actual Completion Date:	

Activities Completed this Reporting Period (Indicate significant completions or ongoing work here for the reporting period only.)	Impact/Value (For each activity there should be a statement describing why we are doing and what the benefit or impact to the court community will be)
<ul style="list-style-type: none"> ✓ The JINDEX on-board readiness assessment forms. 	As part of the RMS project DIS is creating a new release management process. The VRV Tier 1 partners will be the initial JINDEX customers to pilot the process.
<ul style="list-style-type: none"> ✓ Issaquah development and unit testing is complete. 	Issaquah is ready for the DIS testing process and release schedule.
Activities Planned Next Reporting Period (Indicate upcoming work here for the next reporting period only)	Impact/Value (For each activity there should be a statement describing why we are doing and what the benefit or impact to the court community will be)
<ul style="list-style-type: none"> ◦ Transition support responsibilities to operations/maintenance. 	Move the VRV data exchange services to the organizations that are resourced to support and sustain the business process.
<ul style="list-style-type: none"> ◦ Meet regularly with Kirkland, Issaquah, and Lakewood to track progress on their on-boarding integration activities and to maintain focus on the August 2011 schedule. 	We need to meet with these partners to focus on meeting the DIS JINDEX on-boarding windows.
<ul style="list-style-type: none"> ◦ 	

MONTHLY ISD REPORT

Approved Project: Records Management System (RMS)	Reporting Period: July 1 – 31, 2011
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Executive Sponsor(s) eTRIP – AOC Dirk Marler	IT Project Manager: Michael.walsh@courts.wa.gov 360-705-5245
	Consultant/Contracting Firm: NA.

Description: RMS allows Law Enforcement communities and courts broader business rules, additional message types, increase efficiency and highly accurate data by minimizing double data entry and improved process flows. This is a multi agency endeavor sponsored by eTRIP.

Business Benefits: RMS is a multi-agency state initiative that will benefit law enforcement agencies. The RMS project is a significant upgrade to JINDEX, the DIS data exchange service. AOC is impacted by the RMS project as we have two systems, eTicketing and VRV, which use JINDEX and are required to make modifications to support the upgrade.

Business Drivers <small>(place x in box)</small>	Improve Decision Making <input type="checkbox"/>	Improve Information Access <input type="checkbox"/>	Improve Service or efficiency <input checked="" type="checkbox"/>	Manage Risks <input type="checkbox"/>
	Maintain the business <input type="checkbox"/>	Manage the costs <input type="checkbox"/>	Increase organizational capability <input type="checkbox"/>	Regulatory compliance or mandate <input type="checkbox"/>

JISC Approved Budget	Allocated (thru July 31st 2010) \$ 0.00 (Budget will be pulled from MSD)	Actual \$0.00 (Budget will be pulled from MSD)
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Current Status	Scope ●	Schedule ■	Budget ●
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Status Notes:
The project deliverables are all complete. AOC resources have been released to return to other assignments. The Inter-Agency Aggrement (IAA09425) cannot be closed until all invoices have been submitted and paid. AOC is responsible for payment of the final invoice which is expected around 9/20/11.

Progress (Update progress in % and fill in bar)	July - 100 % 
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Project Phase <small>(place x in box)</small>	<input type="checkbox"/> Initiate	<input type="checkbox"/> Planning	<input type="checkbox"/> Execute	<input checked="" type="checkbox"/> Close
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Schedule (use JISC approved plan dates if avail)	Planned Start Date: 3/22/2010	Planned Completion Date: 6/12/2011
	Actual Start Date: 3/24/2010	Actual Completion Date: 7/1/2011

Activities Completed this Reporting Period <small>(Indicate significant completions or ongoing work here for the reporting period only.)</small>	Impact/Value <small>(For each activity there should be a statement describing why we are doing and what the benefit or impact to the court community will be)</small>
✓ Complete the project Closeout	Audit all project activities, archive completed work, transfer ongoing tasks and open issues to operations and maintenance, and dismiss the project staff to return to their

MONTHLY ISD REPORT

	other duties.
Activities Planned Next Reporting Period (Indicate upcoming work here for the next reporting period only)	Impact/Value (For each activity there should be a statement describing why we are doing and what the benefit or impact to the court community will be)
<ul style="list-style-type: none"> ◦ Make final payment to OBS under contract IAA08425. 	Make the final payment to the contract will allow the PM to close the contract and closeout the project.

MONTHLY ISD PROJECT REPORT

Initiative: Superior Court Data Exchange (SCOMIS DX)

JIS Operational Plan: (Design)

Reporting Period: July 1 – 31, 2011

Executive Sponsor(s)
Data Management Steering Committee
Rich Johnson, Chair of Committee

IT Project Manager:
Bill Burke (360) 704-4024
bill.burke@courts.wa.gov

Business Area Manager: Jennifer Creighton

Consultant/Contracting Firm: N/A

Description: The Superior Court Data Exchange project will deploy a Data Exchange that will enable all local court information systems to access the Superior Court Management Information System (SCOMIS) and Judicial Information System (JIS) services via a web interface using a standard web messaging format. The project scope consists of deploying (60) Data Exchange web services that will be available to all local court information systems.

Business Benefit: The project will produce a consistent, defined set of standards and standard technology solutions for sharing data between Judicial Information System (JIS) applications supported by the AOC and its customers (Courts and Justice Partners) to:

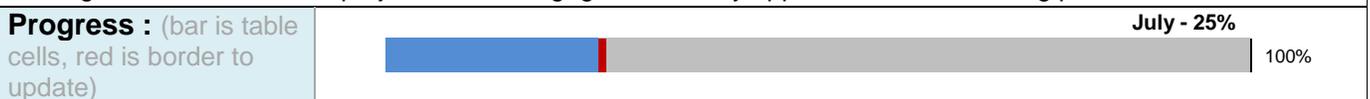
- Eliminate redundant data entry
- Improve data accuracy
- Provide access to real-time information for decision making
- Reduce support costs through a common technical solution for sharing data

Business Drivers (please X box)	Improve Decision Making <input checked="" type="checkbox"/>	Improve Information Access <input checked="" type="checkbox"/>	Improve Service or efficiency <input checked="" type="checkbox"/>	Manage Risks <input type="checkbox"/>
	Maintain the business <input type="checkbox"/>	Manage the costs <input checked="" type="checkbox"/>	Increase organizational capability <input checked="" type="checkbox"/>	Regulatory compliance or mandate <input type="checkbox"/>

JISC Approved Budget	Allocated (Don't fill in)	Actual (Don't fill in)
	\$	

Current Status	Scope	●	Schedule	●	Budget	◆
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Status Notes: Sierra Systems' price proposal for implementing the Superior Court Data Exchange exceeds JISC funding authorization. AOC project team is engaged to identify opportunities for reducing price.



Phase (what phase is project currently in)	<input type="checkbox"/> Initiate	<input checked="" type="checkbox"/> Planning	<input type="checkbox"/> Execute	<input type="checkbox"/> Close
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Schedule	Planned Start Date: 5/15/2009	Planned Completion Date: TBD
	Actual Start Date: 5/15/2009	Actual Completion Date:

Activities Completed	Impact/Value
<p>✓ The AOC has been engaged in contract negotiations with Sierra Systems for implementing the SCDX. The negotiations have focused on the specific technical scope of work for the 1st SCDX Production Increment, to ensure that the AOC has web services that can be deployed to support an interface between SCOMIS and the Pierce Co LINX System. These negotiations are nearing completion with Sierra Systems agreeing that the 1st Production Increment</p>	<p>Once contract negotiations have been completed, Sierra Systems can begin implementing the SCDX infrastructure & initial (10) web services.</p>

MONTHLY ISD PROJECT REPORT

<p>will include all RFP specified SCDX infrastructure functionality and (10) SCDX web services. Included in these initial SCDX web services are the (5) SCDX Docket web services that account for 30% of the dual data entry performed by Pierce County.</p>	
<p>✓ A Technical Meeting was held with the Pierce County LINX team to begin discussing the SCDX web services that are planned for deployment. The purpose of these meetings is to confirm the web service designs to ensure that Pierce County can use these services for interfacing with SCOMIS. These meetings are intended to occur bi-weekly until all SCDX web service designs have been reviewed by the Pierce County team.</p>	<p>These meetings are necessary to verify that the SCDX web service designs can be used effectively from an external system. While Pierce County is the initial County that will use the SCDX, the design is intended to support other external systems.</p>
<p>✓ A Database Analyst will be added to the SCDX project team to evaluate synchronizing the LINX Case Management records with the Pierce County case management records in SCOMIS, prior to transitioning the SCDX to Production. This synchronization will be necessary to ensure that any case management record updates initiated in LINX are applied to the corresponding case management records in SCOMIS. To ensure this unique mapping, the LINX system will need to store the SCOMIS case docket unique identifier.</p>	<p>A Database Analyst is being added to the project to assist in developing a plan on how the LINX and SCOMIS case management records can be synchronized prior to the SCDX being transition into Production.</p>
Activities Planned	Impact/Value
<p>◦ Finalize contract negotiations with Sierra Systems and have Sierra Systems begin implementation planning.</p>	<p>Finalize scope & price for development contractor engagement and have the development contractor begin developing an implementation plan.</p>
<p>◦ Finalize the remaining SCDX project documentation for the 1st Production Increment.</p>	<p>These specifications are needed by Sierra Systems to implement the 1st Production Increment. These documents define the SCDX infrastructure functionality and the the Jagacy development required to perform SCOMIS/JIS screen scraping.</p>
<p>◦ Begin developing a plan for case management record synchronization between LINX and the SCOMIS/JIS systems.</p>	<p>Required to ensure any case management record updates initiated by the LINX system is applied to the correct corresponding case management record in SCOMIS/JIS.</p>
<p>◦ Continue to hold bi-weekly meetings with Pierce County to review all SCDX web service designs to ensure that these web services can be used by the Pierce County LINX team to interface to the SCOMIS & JIS systems.</p>	<p>Validate the SCDX web service designs.</p>