INITIAL INTEGRATION PLAN

Template

Version 1.1 ● June 28, 2012

**Using This Template**

This and other PDM tools are available. All Sections are required to be addressed, however if a section or subsection is not needed, that section/subsection of the document can be marked as Not Applicable but an explanation must be provided as to why it does not apply. Please also reference the **Lessons Learned** section in the Appendix for additional information that may assist.

To create a deliverable from this template:

1. Delete the template title page (previous page) and this page.
2. Replace [bracketed text] on the cover page (next page) with your project and agency information.
3. Replace [bracketed text] in the tool header area at the top of page i (Contents page) with the same project and agency information as on the cover page.

Note: Please do not remove or modify content in the footer area.

1. Complete the entire template. Each section contains abbreviated instructions, shown in italics, and a content area. The content area is marked with a placeholder symbol (⇒) or with a table. Relevant text from other project deliverables may be pasted into content areas.

Note: Please do not remove the italicized instructions.

1. Update the table of contents by right-clicking and selecting “Update Field,” then “Update entire table.”

**Template Revision History**

| **Version** | **Date** | **Name** | **Description** |
| --- | --- | --- | --- |
| 1.0 | 2/5/2012 | PDM Project team | Initial Creation |
| 1.1 | 6/28/2012 | David Davis | Added user help documentation plan |
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Project Delivery Methodology (PDM)

**INITIAL INTEGRATION PLAN**

**[Functional Office(s) Name]**

**[PROJECT NAME]**

|  |  |
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| VERSION: [Version Number] | REVISION DATE: [Date] |

Approval of the Initial Integration Plan indicates an understanding of the purpose and content described in this deliverable. By signing this deliverable, each individual agrees with the content contained in this deliverable.

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| **Approver Name** | **Title** | **Signature** | **Date** |
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# Section 1 Integration Overview

## 1.1 Purpose

*Specify the purpose and its intended audience.*

⇒

## 1.2 Business Context

*Provide an overview of the business organization sponsoring the development of the software application, including the mission statement and organizational objectives of the business unit.*

⇒

## 1.3 Scope

*Describe the scope of the software application to be produced. This section gives a brief description of the planned project and the purpose of the system to be built. Special emphasis is placed on the project’s deployment complexities and challenges.*

⇒

# Section 2 Integration Strategy

*This section informs the reader what the high level plan is for integration and, most importantly, why the integration plan is structured the way it is. As mentioned before, the Integration Plan is subject to several constraints, sometimes conflicting constraints. Also, it is one part of the larger process of build, integrate, verify, and deploy. All of which must be synchronized to support the same project strategy. So, for even a moderately complex project, the integration strategy, based on a clear and concise statement of the project’s goals and objectives, is described here at a high, but all-inclusive, level. It may also be necessary to describe the analysis of alternative strategies to make it clear why this particular strategy was selected.*

*The same strategy is the basis for the Build Plan, the Verification Plan, and the Deployment Plan. So, it may only be necessary to justify this strategy once, perhaps in the Project Plan, or in the SEMP.*

*This section covers and describes each step in the integration process. It describes what components are integrated at each step and gives a general idea of what threads of the operational capabilities [requirements] are covered. It ties the plan to the previously identified goals and objectives so the stakeholders can understand the rationale for each integration step. This summary level description also defines the schedule for all the integration efforts.*

⇒

# Section 3 Impact Assessment

*List all existing systems impacted by the system interfaces listed in the Requirements Definitions document.*

1. *If the changing existing systems that are impacted are included in the scope of this project provide a detailed plan for how each will be addressed, and if applicable integrated into this system. Detail should include such information as the data attributes that are being affected and old to new information exchanges.*
2. *If Business Processes are changing for the Owning Business Office or related Business Offices’ provide a detailed plan for how each will be addressed.*

# Section 4 Initial Data Conversion Plan

*Describe the steps necessary for data conversion, fall-back plans, and initialization.*

*⇒*

# Section 5 Test Strategy

1. *Identify which types of tests are to be performed (e.g. Unit, Integration System, UAT, etc.) and who is responsible.*
2. *Describe the test environment requirements (e.g. Browser versions, hardware, OS levels, etc.).*
3. *Detail the Critical Success Factors in determining how to organize the test (i.e. identify most important errors or complex processes as early as possible to help lower rework costs)*
4. *Identify areas to be tested, areas that cannot be tested, or cannot be fully tested, and what risks will be incurred*
5. *Identify quality objectives and how they will be measured (e.g. number and severity of defects allowed from one test level to the next)*

 *⇒*

# Section 6 User Help Documentation Plan

*Define who will design the online help, initial user manual documentation (I/O examples and an outline of narrative development), and user guides. If BSSO is providing any of these deliverables, describe the initial design approach for each of the help documentation components BSSO will deliver.*

*⇒*

# Section 7 Phase 1 Integration

*This, and the following sections, define and explain each step in the integration process. The intent here is to identify all the needed participants and to describe to them what they have to do.*

*In general, the description of each integration step should identify:*

* *The location of the activities*
* *The project-developed equipment and software products to be integrated Initially this is just a high level list but eventually the list must be exact and complete, showing part numbers and quantity*
* *Any support equipment [special software, test hardware, software stubs, and drivers to simulate yet-to-be-integrated software components, external systems] needed for this integration step. The same support equipment is most likely needed for the subsequent verification step*
* *All integration activities that need to be performed after installation, including integration with on-site systems and external systems at other sites*
* *A description of the verification activities [as defined in the applicable Verification Plan] that occur after this integration step*
* *The responsible parties for each activity in the integration step*
* *The schedule for each activity*

⇒

## 7.1 Phase [n] Integration [1 or n steps, for multiple steps]

*This, and any needed additional sections, follow the format for section 3. Each covers each step in a multiple step integration effort.*

⇒

# Section 8 Revision History

*Identify changes*

| **Version** | **Date** | **Name** | **Description** |
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