



# THE FBMS EXPRESS

THE FINANCIAL AND BUSINESS MANAGEMENT SYSTEM (FBMS)  
QUARTERLY NEWSLETTER

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## Upcoming Events

### August 2011

9<sup>th</sup> FBMS Executive Steering Committee Meeting

10<sup>th</sup> Project MGNT Review

22<sup>nd</sup> D6 Test Readiness Review-User Acceptance

### September 2011

7<sup>th</sup> Project MGNT Review

13<sup>th</sup> FBMS Executive Steering Committee Meeting

### October 2011

11<sup>th</sup> FBMS Executive Steering Committee Meeting

12<sup>th</sup> Project MGNT Review

14<sup>th</sup> D6 Production Readiness Review

17<sup>th</sup> D6 End User Training Begins

# FBMS's Internet Payment Platform Interface Updated

On May 1, 2011, DOI began using the Internet Payment Platform (IPP) for the electronic submittal of invoices and the exchange of payment information to its vendors of goods and services. The use of IPP for the submittal of invoices became a mandatory requirement for any new contract vehicle where new awards would be made on and after May 1, 2011 for BLM, BOEMRE, OSM, and USGS.

On July 5, 2011, a FBMS IPP interface update was implemented that enabled vendors using a Social Security Number instead of a Taxpayer Identification Number to submit invoices via IPP.

The Internet Payment Platform (IPP) is a secure web-based electronic invoicing and payment information service made available to all Federal agencies and their vendors by the U.S. Treasury's Financial Management Service. IPP allows Federal agencies and their vendors to exchange electronic purchase orders (POs), blanket POs, invoices, and payment information in one easy to access web portal that streamlines the order to pay process.

IPP is benefitting DOI by: (1) eliminating

the time-consuming and expensive paper-based processes in the order-to-pay cycle; (2) enabling compliance with Prompt Pay requirements; (3) expediting invoice approvals via online routing within IPP; and (4) improving relationships with vendors.



Beginning on/after October 1, 2011, the U.S. Fish and Wildlife Service (FWS) and the DOI Departmental Offices – including the National Business Center (NBC) will require the use of IPP for the electronic submittal of invoices. This notice will be updated as the use of IPP is mandated throughout the remaining DOI bureaus. The remaining bureaus include: BOR, NPS, and IA will begin using IPP when they deploy FBMS.

Currently, 10,522 DOI vendors are registered to use IPP and to date, over 1,600 invoices submitted via IPP have been paid. Beginning in November 2011, FWS and the DOI Departmental Offices will begin using IPP for the electronic submittal of invoices.

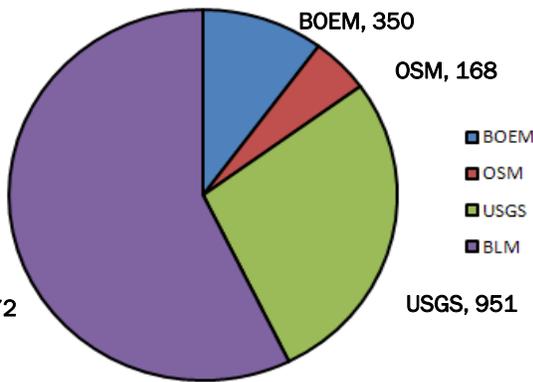
*"FBMS is the cornerstone of a fully integrated business management system, supporting DOI as a world-class organization acknowledged for management excellence and effective mission delivery"*

*- FBMS Executive Steering Committee*



# PRODUCTION NEWS/INFO

Active System Users During July 2011



This is a snapshot of FBMS users during a 7 day period in July. Typically, there are over 1,200 users on the system daily during a normal workweek (M-F). Most weekends, there are 10 to 30 users on the system.



The tool will also be used to document SOD rules, provide ongoing SOD violation reports, and perform SOD checks within the automated UAM process. The new software tool is based on SAP's Governance, Risk, and Compliance (GRC) Access Control suite of products.

SOD reviews are required as a part of the FBMS role assignment and approval process to ensure that the combinations of roles mapped to a single position with duties that are potentially conflicting in nature are identified, addressed, and that appropriate action is taken to

prevent the creation of internal or financial control issues. SOD review determinations result in SOD rules. SOD rules are based on Governmental and Departmental Guidance. Rules can be defined by the FBMS Program Management Office's (PMO) Business Process Team, PMO Information Assurance Team, PMO Security Team, Departmental policy offices, DOI Bureaus, and Audit/Risk Managers. Rules are determined at the transaction level and identified at the role level.

The PMO conducted three live demos of the Compliance Software tool for the Bureaus in May and June 2011. The tool is currently being tested as part of D6 integration testing. Compliance Software training will be conducted in November and December 2011.

## FBMS's New Compliance Software Tool

When FBMS's Deployment 6 goes live on November 7, 2011, the system will begin using a new automated user account management (UAM) and separation of duties (SOD) compliance software

tool. FBMS Compliance Software is an integrated, workflow-based solution that will automate the FBMS user registration, role request and approval, and user deactivation processes.

## NBC FBMS Customer Support Center Survey Highlights



The purpose of the survey was to get feedback from FBMS Users who reported system incidents to the NBC Customer Support Center during the period January 1, 2011 to June 17, 2011. The survey was conducted via telephone between June 27, 2011 to July 15, 2011, using a random sampling of 475 users.

NBC's Customer Support Center (CSC) Team and the PMO's Operations and Maintenance Team will work to improve CSC assistance efforts using the

results of the survey.

The results were briefed to the FBMS Executive Steering Committee during their August 9<sup>th</sup> meeting. Here are some highlights:

The overall service satisfaction feedback is positive, with 68% of the respondents rating their overall satisfaction between an eight and a ten on a scale from one to ten, where one equaled "Very Dissatisfied" and ten equaled "Very Satisfied".

The overall satisfaction results

are delivered with a 95% confidence level and +/- 5.74 confidence interval, based on the 250 responses received from the population of 18,388 reported incidents.

The highest percentage of negative responses was received on the question "Your inquiry was answered to your satisfaction", receiving 8 % negative results from the 248 customers who responded, scoring it between a one and three.

The questions "You received

timely customer service" with 248 responses and "The customer service representative was knowledgeable of the FBMS and/or functional area", with 244 responses; are tied for the highest percentage of neutral results with 33% of respondents scoring these questions between a four and seven.

"The customer service representative was courteous and professional" received the highest percentage of positive responses, with an 88% satisfaction rate.



# DEPLOYMENT 6 NEWS / INFO

## Deployment 6 Role Mapping Workshop II



**Dan Johnson,** FBMS PMO Core Financial Team, discussing changes to the existing 4 Controlling Project System (COPS) Roles and the addition of a new FBMS COPS Role.

On June 7<sup>th</sup> and 8<sup>th</sup>, the FBMS Program Management Office (PMO) conducted the second Deployment 6 (D6) Role Mapping Workshop.

The objectives of the workshop were to: (1) discuss new FBMS end user roles; (2) high-

light significant changes to existing end user roles; (3) discuss changes to separation of duty rules, rules that preclude role conflicts; (4) provide update guidance on the End User Role Mapping Worksheet and Role Mapping Certifica-

tion; and (5) provide insights on the relationship between D6 Role Mapping and D6 Training.

Managers involved in the Role Mapping and Certification Process from the Departmental Offices (DO), the U.S. Fish

and Wildlife Service (FWS), the U.S. Geological Survey (USGS), the Bureau of Land Management (BLM), the Bureau of Ocean Energy and Management (BOEM), and the Office of Surface Mining (OSM) attended the workshop. Managers from Indian Affairs, the National Park Service, and the Bureau of Reclamation were invited to attend the workshop as observers. They are the next Bureaus to receive FBMS.

The workshop was a WEBEX hosted from the FBMS PMO's Sky Leshner Conference Center in Herndon, with DO and Bureau managers participating from over 70 locations from across the country.

## Deployment 6 Cycle 2 Integration Testing



Richard Daigle, Quality Manager, FBMS PMO briefing Cycle 2 Bureau Testers, Bureau representatives, and PMO Team members on the objectives of Cycle 2 Integration Testing.

D6 Cycle 2 Integration Testing began on July 11, 2011. The purpose of this testing cycle is to give D6 Bureau subject matter experts (SMEs) an opportunity to: (1) analyze and validate the Finan-

cial and Business Management System; (2) measure the system's quality and reliability; and (3) expose any defects in the system, so FBMS Program Management Office (PMO) resources can correct them.

SMEs from the Departmental Offices (DO), FWS, USGS, BLM, BOEM, and OSM are participating in the testing.

The testing was conducted in PMO test labs in Herndon, Virginia and Denver, Colorado. During the testing, DO and FWS testers tested all of FBMS's existing and D6 business process functions; while USGS, BLM, BOEM, and OSM testers tested changes to exist-

ing FBMS functionality. Cycle 2 Testing was completed on August 19, 2011.

On August 22, 2011, User Acceptance Testing (UAT) began. During UAT, members of DO and FWS's workforces and the workforces of Bureaus using FBMS, selected by Bureau tester managers are conducting the final validation testing of the system's D6 functionality. UAT is scheduled to be completed on September 9, 2011.



Testers wearing their favorite team shirts during one of several Spirit Days.

**Contact The  
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**Deployment 6  
Go-Live  
November 7, 2011**

# DEPLOYMENT 6 TRAINING PREPARATIONS

Since the D6 Training Kick-off was held on March 24, 2011, the FBMS Program Management Office's (PMO) Training Team, the Departmental Offices' (DO) Training Lead, and the FWS Training Lead have been working very hard preparing for D6 Pilot Training and the actual training of over 2,000 new FBMS users.

PMO Training Team members have been busy implementing the D6 Training Strategy; scheduling and hosting PMO / Bureau training meetings; coordinating with PMO business process subject matter experts (SMEs) to develop a variety of training materials and to resolve training content issues; reviewing final drafts of training materials; populating the training environment with training data; developing the D6 Training Schedule; assisting instructors prepare for their classes; and providing support to DO and FWS Training Leads.

DO and FWS Training Leads have also been busy coordinating training room readiness activities (i.e., room capacity, equipment, connectivity, etc.); identifying DO and FWS SMEs to work with PMO instructors as assistant instructors; and reviewing and providing feedback to the PMO Training Team on train-



**Training from an earlier time**—The US Bureau of Mines conducts mine rescue and First aid training sometime after 1910, when the Bureau was created to promote mine safety and minerals technology.

ing materials.

Training Leads from USGS, BLM, BOEM, and OSM are also involved in D6 training preparation activities. They are involved because new roles have been developed or existing roles have changed, and in many cases new training requirements exist.

The scheduling of DO and Bureau employees for D6 Training will be accomplished during the August - September timeframe. FBMS PMO instructors and DO and Bureau assistant instructors will conduct the final review of the training materials and rehearsals of the instructor led classes in September. Train-

ing materials will be reproduced for the classes in October. The computer based training class materials are being developed or updated concurrently with the instructor led training course materials and will be completed early September 2011.

D6 instructor led and computer training will begin on October 17, 2011 and end on January 13, 2012. Computer based training classes are for roles that are not complex and are suitable to self-paced instruction anytime after September 12, 2011.

## Upcoming D6 Training Activities

9/12/ 11–9/23/11:	Pilot Training
10/5/11–10/12/11:	New System Users Assigned to Learning Plans
10/6/11 to 10/13/11:	New System Users Notified of Training Requirements
10/11/11 to Indefinitely:	Computer Based Training
10/17/11 to 1/13/12:	End User Instructor Led Classes

THE FBMS EXPRESS



# DEPARTMENTAL OFFICES DEPLOYMENT 6 ACTIVITY HIGHLIGHTS



To assist Departmental Office (DO) role mapping leads with their responsibilities, the Implementation Management Office (IMO) developed a D6 redeploy roles to current position mapping report in collaboration with the PMO.

The IMO team obtained access and received training on Approva BizRights Separation of Duties (SOD) tools. This allowed the IMO to conduct record-level SOD analysis across OS, target SOD violations, and make corrections, preliminary to submission to the PMO; results were incorporated into OS Role Mapping Workshop #3 meeting materials.

Conducted two (2) OS Role Mapping Workshops on April 19-21 and May 17-19, the purpose of which was to:

- Review and share end user role
- mapping worksheets and related Core Role Profiles
- Provide role mapping guidance to enable organizations to continue to refine their EURMWs and CRPs
- Generate collaborative discussions across FBMS functions and across OS Offices pertaining to role mapping, re-defined processes, and separation of duties
- Provide FBMS D6 Training and Security Overview
- Discuss opportunities for streamlining business processes
- Review SOD results and any waiver determination based on revised Core Role Profiles and EURMW



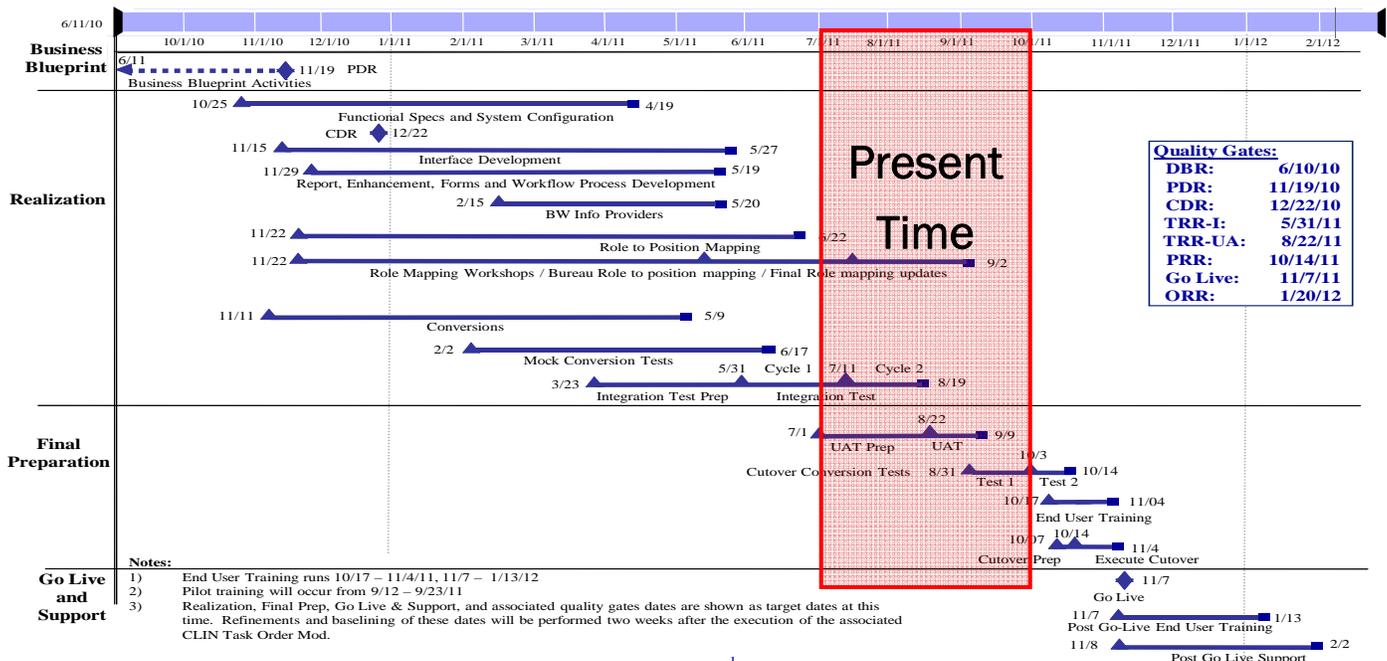
- Provide guidance to enable organizations to finalize EURMW for re-deployed roles
  - Provide an update on FBMS Testing efforts
  - Provide an update on Training activities
- Managed test script review process with test coordinators and SMEs, including submitting comments on the new scripts to the PMO Portal.

For delivery to OS Testers: Prepared Cycle 2 tester vetting documentation, including initial tester assignment list and roster as per PMO templates, an accompanying communication, and an additional tester request form.

DO conducted a two-day FBMS D6 Cycle 2 Tester Preparation Workshop (June 24 and July 8) jointly with the Fish and Wildlife Service, the purpose of which was to provide an overview of Cycle 2 testing:

- Review testing schedule and tester assignments
- Discuss testing roles and responsibilities, including coordination with FWS
- Answer any testing related questions and address concerns that we may have to date
- Conduct additional demonstrations of FBMS business processes and their integration points

## D6 Timeline & Quality Gates





# DEPLOYMENT 6 UPDATE



The U.S. Fish and Wildlife Service (FWS) Financial and Business Management System (FBMS) Project Management Team (PMT) has been actively engaged in preparing for Deployment 6 (D6) Go-Live on November 7, 2011.

To effectively prepare the FWS FBMS end-user community for the changes ahead, the FWS FBMS PMT facilitated Deployment Preparation Workshops (DPWs) in Atlanta, GA, Portland, OR, Denver, CO, Anchorage, AK, and Washington, D.C., which were attended by more than 1,000 FWS employees.

In an effort to reach an even larger audience, the FWS FBMS Project Manager and Deputy Project Manager also

recorded a National Conservation Training Center (NCTC) Supervisory Update Broadcast in June. The 35-minute segment provided a general overview of FBMS and an introduction to some of the changes that all FWS employees can anticipate as a result of the deployment. The FWS FBMS PMT hopes that more than 7,000 FWS employees will ultimately view the broadcast when NCTC makes it available on its website.

The FWS FBMS PMT has also been developing the FWS FBMS training strategy in coordination with NCTC and the Department of the Interior (DOI or the Department) FBMS Project Management Office (PMO).



Based on June role mapping results, FWS expects to train approximately 2,700 FBMS end users. Throughout these activities, members of the FWS FBMS Implementation Team and the DOI FBMS PMO continued regular meetings to discuss other topics and functional areas critical to the bureau's transition to FBMS,

such as real property and data cleansing. In the coming months, FWS will continue to prepare for Go-Live, focusing specifically on training, role mapping, data cleansing and preparation, and Deployment 7 (D7) blueprinting.

## UPCOMING FWS D6 ACTIVITIES

Over the next few months, the U.S. Fish and Wildlife Service (FWS) Financial and Business Management System (FBMS) Project Management Team (PMT) will continue day-to-day deployment preparation activities, including data cleansing, training preparation, Deployment 7 (D7) blueprinting, and role mapping. The FWS FBMS Data Preparation and Cleansing (DP&C) Team is in the process of assessing Mock 1

results to continue to improve the rate with which FWS data successfully converts to FBMS. As part of this process, the FWS FBMS DP&C Team is working with each FWS Region to address cleansing areas prior to Mock 2, which begins in July and is scheduled to continue through mid-August.

The FWS FBMS Training Team plans to complete its training strategy in early July. A key

component of the strategy includes development of a one week "field training" course that will equip FWS administrative personnel located at more than 600 field stations with the skills they need to perform their duties in FBMS. To ensure the success of this important piece of the FWS training strategy, two members of the FWS FBMS Training Team will be integrated into the Department of the Interior (DOI or the Depart-

ment) FBMS Project Management Office (PMO) Training Team for approximately three months. Since role mapping activities go hand-in-hand with training, the FWS FBMS Role Mapping and Training Teams will be closely coordinating activities to shape the final role assignments FWS will provide in September.

# DEPLOYMENT 7 NEWS



## NPS FBMS KICK-OFF EVENT HELD



NPS Comptroller and Project Sponsor, Bruce Sheaffer, opened the meeting with a keynote discussion on the history of the financial systems in the bureau

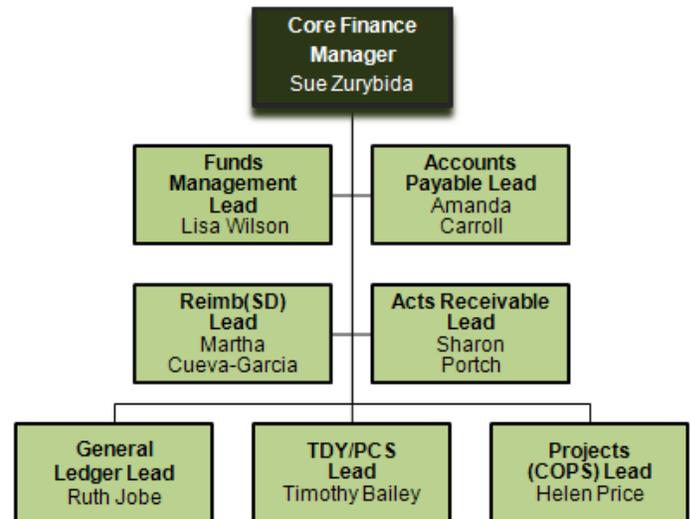
On May 5, 2011, approximately 150 NPS employees attended the FBMS Kickoff Event at the National Conservation Training Center in Shepherdstown, WV.

This event provided park, region, and WASO attendees with the opportunity to learn about the overall FBMS effort, stages of the project's implementation, and their role on the FBMS project team. Participants also had an opportunity to network with other team members and share ideas on the FBMS implementa-

tion.

Eric Stone, NPS FBMS Program Manager, introduced FBMS to the attendees. This introduction included the FBMS hierarchy and organizational chart, roles and responsibilities, as well as the project schedule. The project managers provided summaries of their areas of the project and introduced team leads. The afternoon breakout sessions provided Subject Matter Experts with the opportunity to network and learn about project team member expectations.

## UPDATE: CORE FINANCIAL



On June 20, 2011, the Core Financial and Master Data teams began attending blueprinting sessions that offered an overview of the basic FBMS logic and processes. These sessions are integral to decisions on the establishment of the NPS FBMS schema (funds/cost center, functional area, and work breakdown structure). The Funds Management and Master Data teams are working with the subject matter experts to review current NPS processes and reporting requirements which will help identify gaps in business processes that need to be incorporated into FBMS.

The structure and nomenclature of the current NPS organization codes, project numbers, and Program Work Elements (PWEs) will

look significantly different than we know today. These two teams continue to work through the myriad of potential changes to ensure they capture each element's function, from initial establishment of the string to document entry and resulting reports. The remainder of the teams will gain insight with each blueprinting session to confirm that the FBMS design will meet the NPS needs. Gaps will be identified for cases in which NPS business process or specific regulatory requirements are not covered. Core Financials impacts every functional area of the project and so the team will continue to examine how NPS processes will be impacted by the implementation of FBMS.



Deployment 7  
Go-Live  
November 5, 2012

## FBMS REQUIREMENTS IMPACT FINANCIAL ASSISTANCE

The implementation of FBMS will require the NPS to adhere to standardized requirements and processes which are used by all DOI agencies. One of the changes the NPS must make involves the standardized usage of Catalog of Federal Domestic Assistance (CFDA) codes on Financial Assistance actions. The CFDA is a government-wide compendium of Federal programs, projects, services and activities that provide

assistance or benefits to the American public. It contains financial and nonfinancial assistance programs administered by departments and establishments of the Federal Government.

While the National Park Service currently has 35 CFDA numbers established, many Financial Assistance actions today are still being executed using pseudo codes. Prior communications have indi-

cated an exception for one-of-a-kind, unique, or temporary Financial Assistance actions. However, when the NPS converts to the FBMS system in October 2012, a valid CFDA will be needed for all Financial Assistance actions and pseudo codes will no longer be allowed. This will apply to both existing Financial Assistance actions as well as new Financial Assistance actions to be awarded in FBMS. Managers of programs where ap-



propriated funding is used to enter into Cooperative Agreements or grants are responsible for the initial development of the CFDA program description listing for the program.

## THE "SERVICE" WELCOMES INDIAN AFFAIRS



*"The FWS Workshop gave a big picture overview of the implementation process, yet touching on almost every business process, procedure or departmental impact and how little or big the change would be."*

*Lisa Callahan, Accounting Officer, Northwest Region*

By Lynn Stapor

The Fish and Wildlife Service (FWS), commonly known as –The Service| extended a warm welcome to Indian Affairs as their D6 Deployment progresses. The Service hosted a series of Deployment workshops throughout the United States and IA had a front row seat in Portland, Oregon; Anchorage, Alaska and Arlington, VA. Lessons learned from previously deployed DOI bureaus indicated that hosting employee workshops, in advance of the formal computer-based and instructor lead training courses is critical for a successful migration to FBMS.

These workshops were intended to provide employees most impacted by the transition with early exposure to FBMS, helping them under-

stand the basis for change, including the associated benefits and anticipated challenges as well as an opportunity to help shape our future state of activities through constructive feedback.

The sessions describe in detail the changes employees can expect to administrative operations and activities were highlighted where employee participation was paramount. In addition, the workshops provided a mechanism for discussing Regional and Program specific challenges as well as identifying and addressing barriers to the implementation. The target audience was defined as –substantial users of FBMS.

## DOI Facts



- Interior manages 394 units of the national park system
- The Department maintains relationships with 565 federally recognized Tribes in the lower 48 States and Alaska
- Interior provides data to the public from over 7,600 stream gauges and 900 earthquake sensors.
- The Department is the largest supplier and manager of water in the 17 western States.

## THE FBMS EXPRESS

## PROJECT PREPARATION INDIAN AFFAIRS –AS-IS BUSINESS PROCESSES



By Sharon Abel

As the D7 Blueprinting Phase is upon us, Functional Leads, Lead Subject Matter Experts (SMEs) and SMEs are preparing to participate in the blueprinting workshops beginning on June 20, 2011 and running into early September. The workshops will include representatives from the National Park Service (NPS), the Bureau of Reclamation (BOR), and all previously deployed bureaus. Because Workshop Leads will be the voice of Indian Affairs (IA) at the workshops, it is paramount that they understand IA current business processes along with any laws, directives, and/or regulations that affect those processes. Several areas of preparation are required for anyone who participates in a blueprinting workshop:

- Understand the current (As-Is) Indian Affairs business processes related to each workshop along with any laws, directives, or regula-



tions that affect those processes.

- Become familiar with D7 Baseline Business Process Design (BPD) documents.
- Downloading and becoming familiar with workshop materials on the PMO Portal as they become available.
- Having the FBMS Acronyms and Terms document handy as a reference tool.

Functional Leads, Lead SMEs and SMEs have been busy in the last month documenting their As-Is business processes at a very high level – the flow of work and what is done, rather than how each task is performed. These as-is processes can be documented in step-by-step format or as flow charts.

## ADDITIONAL OUTREACH EFFORTS



### NORTHERN NAVAJO AGENCY SHIPROCK, NEW MEXICO



From left to right: Mary Lujan, Agency Realty Officer; Selena Winney, Realty Assistant; and Rosalita Thomas, Legal Administrative Specialist.

Rocky Mountain Regional Office – April 2011: Carol Gilham conducted an FBMS PowerPoint Demonstration to a combination of program personnel including; Irrigation, Realty, Administration, Self-Governance, Natural Resources, Range, Law Enforcement, and Facilities. Attendees were from the Blackfeet Agency, Crow Agency, Fort Belknap Agency, Fort Peck Agency, Northern Cheyenne Agency, and the Wind River Agency.

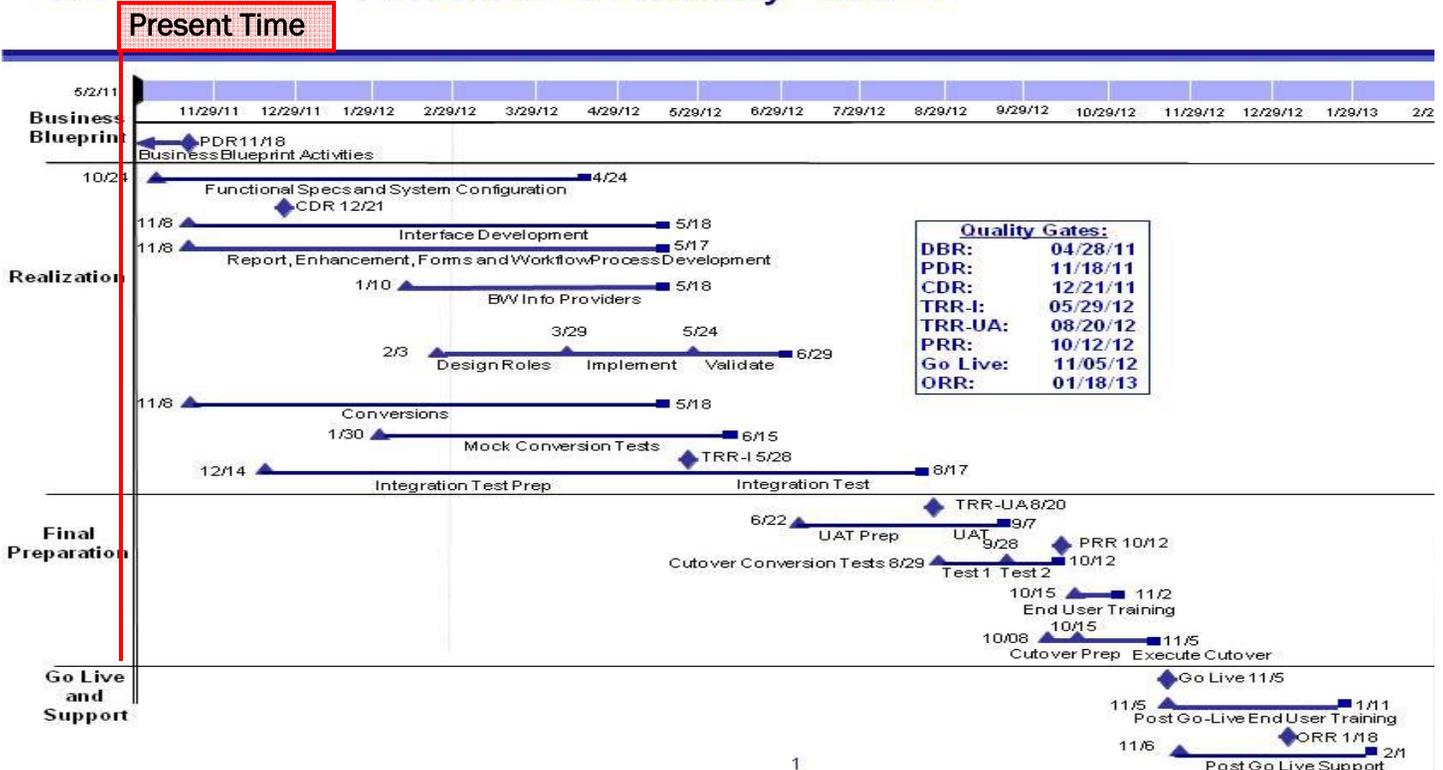
Federal Agency Travel Administrators at SIPI – May 2011: Kellie Starkie briefed over sixty attendees on FBMS by conducting a PowerPoint Demonstration in conjunction with a GovTrip Workshop. She discussed the who, what, why, and when in reference to FBMS. The audience consisted of BIE, BIA, and Law Enforcement.

**THE FBMS EXPRESS**

**Quality Gates** serve as go-no go checkpoints to verify that all necessary tasks and deliverables have been completed for a given phase and that the PMO and bureaus are ready to begin the next phase of activities. Detailed checklists and deliverables are reviewed at each gate.

Gate	Description
DBR	Deployment Baseline Review (DBR) – Present the agreed upon scope, confirm that adequate budget and resources are available, establish tasks in the Integrated Master Schedule (IMS) and identify and mitigate risks.
PDR	Preliminary Design Review (PDR) – Validate that Functional Requirements are defined and mapped to business process documentation, the proposed design is sustainable both technically and functionally and scope is defined and documented to an adequate and appropriate level of detail.
CDR	Critical Design Review (CDR) – Eliminate or mitigate risk to the deployment and confirm the application design to a more detailed level than was defined in the FBMS Scope Definition Document produced during the Project Preparation phase.
TRR-I	Test Readiness Review, Integration (TRR-I) – Confirm the system is configured per the design and that objects are documented, coded, unit tested, transported and are ready for Integration Testing Cycle 1. Verify that functional requirements are testable, have data and are mapped to test cases, and that critical risks are resolved or have appropriate mitigation plans.
TRR-UA	Test Readiness Review, User Acceptance (TRR-UA) – Confirm the software development is complete, and changes since PDR and TRR-I have been properly integrated into the software and project documentation. Verify test plans and test cases/scenarios have been reviewed by the project team, Integration Testing is complete, and critical risks (relevant to testing) are resolved or have appropriate mitigation plans.
PRR	Production Readiness Review (PRR) – Confirm readiness for cutover and that communications are prepared. Validate that Cutover Conversion Test activities are underway and are being tracked appropriately, and that end user training material is complete and ready to be delivered. Verify UAT is complete and support and maintenance procedures and resources are in place and tested.
GO-LIVE	Go-Live – In contrast to the other quality gate reviews, the purpose of the Go-Live is to conduct a session with FBMS project personnel and stakeholders in order to demonstrate the readiness of the deployment and bureau readiness.
ORR	Operational Readiness Review (ORR) – Confirm the system is stable, support procedures are documented and in place, knowledge transfer is complete, and that the Government is ready to support the system without direct SI support (other than the ticket work-off and necessary support for unexecuted batch jobs).

## D7 Notional Timeline & Quality Gates



# Bureau of Reclamation News

## Reclamation Kicks-Off FBMS Deployment



On May 16 and 17, 2011, the Financial and Business Management System (FBMS) Project Management Team (PMT) conducted a Kick-Off Workshop in Denver to discuss the upcoming FBMS deployment and the Blueprinting process. More than 100 employees responsible for finance, budget, acquisition, property management, and other administrative functions from all regions and key directorates across Reclamation attended the kick-off.

Day 1 of the Kick-Off Workshop was devoted to key topics and introduced FBMS project goals, project management strategies, and Blue-

printing requirements. Following the welcome from FBMS Executive Sponsor, Liz Cordova-Harrison, an FBMS project overview was provided by Ms. Debra Sonderman, FBMS Co-Executive Sponsor/DOI Executive Procurement Officer, followed by an FBMS Project Management

Office (PMO) overview provided by Rayleen Cruz, DOI FBMS Business Process Manager. Along with these presentations, Reclamation introduced its Project Management Team, governance structure, and other supporting teams, including a Controlling Team to help address account structure issues expected

from the deployment of FBMS. Information also was provided on Reclamation's Blueprinting effort as part of D7, which is scheduled to start June 20, 2011, along with a planned data management and conversion strategy.

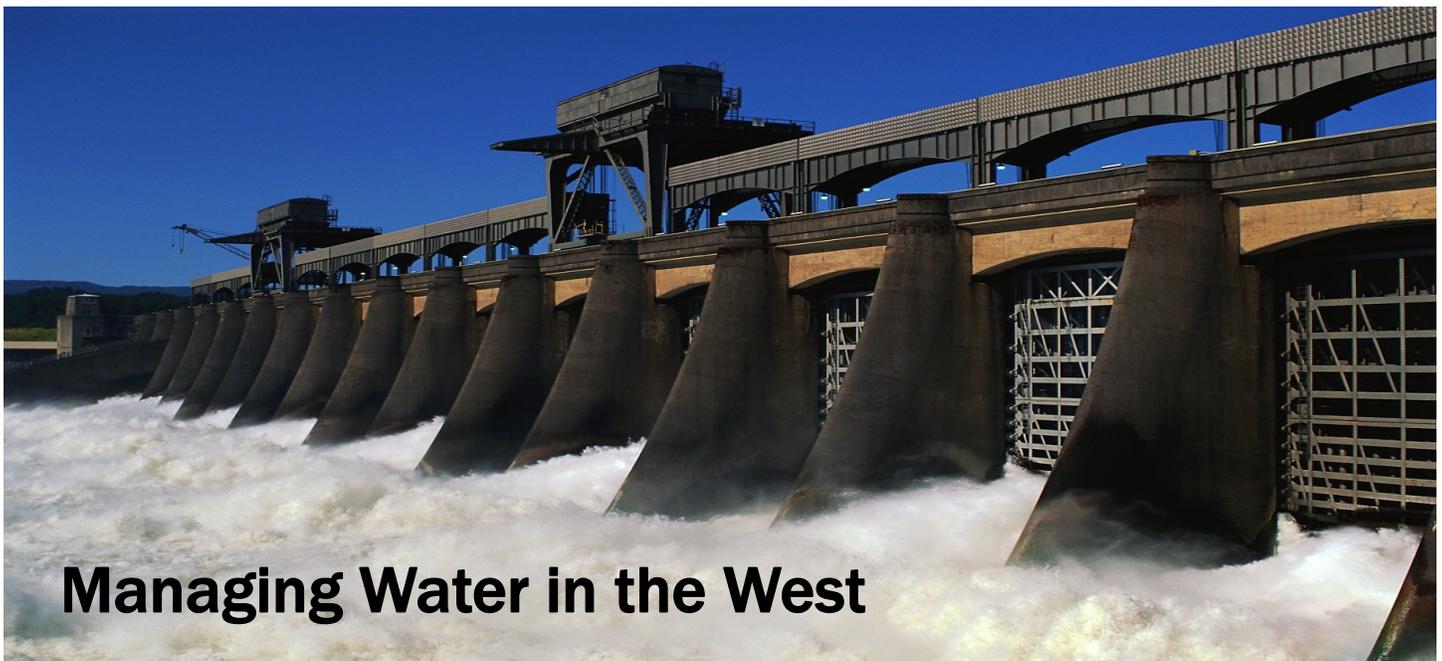
Day 1 also included input and lessons learned from other bureaus (USGS, Fish & Wildlife Service, and the Office of Surface Mining) that have already successfully deployed FBMS. As part of the panel discussion, employees had the opportunity to ask bureau representatives questions regarding the FBMS deployment. On Day 2, the PMT hosted multiple breakout sessions to provide insight on the various functional areas re-

garding enhancements offered by FBMS. The breakout sessions addressed Finance, Enterprise Management

Information System, Controlling Team, Acquisitions, Financial Assistance, Property, Regional Coordinators' Team, and

Executive Steering Committee issues. The second day ended with a wrap-up on

Reclamation's legacy systems, communications strategies, and closing remarks from Ed Abreo, Project Manager. Employees were asked to provide an evaluation of the kick-off at the conclusion of Day 2.



## Managing Water in the West

## Our Iceberg Is Melting: FBMS Call to Embrace Change

During the FBMS Kick-Off, FBMS PMT Organizational Management Lead Shelly Wisner presented a film based on the book, "Our Iceberg Is Melting," by John Kotter and Holger Rathgeber.

The book presents a story of a community of penguins in Antarctica whose existence is changed when one of their flock notices the iceberg they call home is melting—an analogy for the way many respond to organizational change. Some will be heroes; some will be No-Nos.

With the FBMS deployment ahead, the story became the theme for the FBMS PMT workshop to help illustrate the need for all team members to embrace change and support the efforts needed to migrate to a better environment.

Looking at key legacy DOI financial systems as the "iceberg," one sees the need for championing the migration of functionality to FBMS. As noted in the workshop, FFS and other supporting systems are older (FFS,

for example, is more than 20 years old) and have become costly to maintain and operate.

In the shift from using FFS, which is slated to be retired, to FBMS, the changes anticipated from D7 include reduction of double entry of data in multiple systems and a decrease in manual paper processing as the legacy systems are retired.

With this theme in mind, the workshops encouraged attendees to ask themselves how they would accept the need to migrate to FBMS and what role they would play in the process. According to the book, there are eight steps to implement successful change:

1. Create a sense of urgency.
2. Pull together the guiding team.
3. Develop the change vision and strategy.
4. Communicate for understanding and buy-in.
5. Empower others to act.
6. Produce short-term wins.



  
The BOR  
FBMS PMT mascot  
embodies the  
concept of  
organizational change



## The Survey Says...

Surveys were gathered during the FBMS Kick-Off Workshop. In order to prepare for the initiative and D7 Blueprinting, the FBMS PMT requested workshop attendees to offer their thoughts and feedback.

The survey asked attendees about the workshop objectives and materials and solicited additional comments from attendees regarding the effectiveness of various aspects of the workshop.

The workshop received positive scores across the board. Nearly 90% agreed that the team met the workshop objectives to help attendees gain information and understanding of the FBMS and the upcoming blueprinting process.

Attendees consistently chose "Strongly Agree" or "Agree" when asked if the workshop helped them gain a basic understanding of FBMS, including goals, scope, and the deployment schedule, and 64% indicated the workshop provided insight into how Reclamation is managing its FBMS deployment and coordinating

with Regions and other participants.

Comments regarding the workshop, such as "The kick-off was a great formal introduction to the FBMS effort," demonstrated the success of the workshop itself. The organizational efforts of the PMT to host and present the workshop were recognized by many attendees as well, with comments such as, "Great job, well done!"

Additional comments from attendees, such as questions and rumors heard about FBMS, indicated areas of concern to those affected by the changes in the system. Questions and queries for clarification will become part of the FBMS Intranet—Rumors and Frequently Asked Questions.

Suggestions regarding the meeting facilities were also requested by the PMT. This feedback prompted discussion among the PMT, who will ensure more appropriate facilities are available for upcoming workshops off-site or in a different location to better accommodate attendees.