Process Asset Library (PAL) Guidelines

Version: 1.1

**Revision History**

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# Purpose

The purpose of this document is to provide guidance on the Organizational Process Assets and to describe the practice overview, requirements, best practices, activities, and key terms related to these requirements. In addition, templates relevant to this practice are provided at the end of this guide.

# Practice Overview

Organization process assets represent the organizations’ learning, knowledge from previous projects, formal and informal policies, procedures, plans, templates and guidelines whose effects must be considered in the future; for e.g.: completed schedules, risk data and estimations.

When developing the project charter; subsequent project documentation and all of the assets that are used to influence the project’s success can be drawn from Organizational process assets. Organization process assets can be organized differently depending on the Organization. Process Assets could be grouped in to two categories

1. Project Knowledge base for storing and retrieving information (PAL):

* Metrics database used to collect and make available measurement data on Processes and Products.
* Project files (E.g.: Estimation sheets, schedule, cost, and quality baselines, project schedules, Project status reports, Planning documentation and Lessons learned).
* Organizational risk database.
* Audit findings database for individual projects and functions.
* Training Materials from the organization trainings and Project trainings.
* Meeting Agenda Database.
* SEPG Components.
* Change Request logs for project.

2. Organizations processes and procedures for conducting work (QMS):

* Organizational standard processes and policies.
* Standard guidelines.
* Templates.
* Guidelines and criteria for tailoring the organizational set of standard processes to satisfy the specific needs of the project.

**Note**: SEPG/ SQA will initiate the changes in QMS through mail mechanism to senior management / project managers (when necessary). If any best practices in the projects are identified or suggestions are received from external/internal reviews; QMS policies/procedures/templates/checklists/guidelines can be changed with the proper change control mechanism

# Deploying Organizational Process Assets

**3.1 For Each Phase end of the Project**

Documentation resulting from project activities which include, project management plan, project schedules and project schedules and risk logs, risk impact and also Issue logs must be sent to Process Asset Library. Lessons learned documentation for each phase can be submitted to the Process Asset Library from each project team member.

Project Manager/ Project lead are responsible for collecting the information and intimate SQA through mail about updates for process assets and deploy in the Process Assets Library

## Project Closure

This section refers to Administrative closure process which defines activities, interactions, and related roles and responsibilities of the project team members and other stakeholders involved in executing the administrative closure procedure for the projects.

Performing the administrative closure process includes integrated activities to collect project records, analyze project success or failure, gather lessons learned, and archive project information for future use by the organization. Project closure documentation includes,

* Formal documentation indicating completion of the project.
* If the project was terminated prior to completion, the formal documentation indicating why the project was terminated and formalized procedures for the transfer of the finished and unfinished deliverables of the cancelled project.
* Historical information and lessons learned information are transferred to the lessons learned knowledge base for use by future projects.

Other administrative closure activities include:

* Confirming the project has met all customer, and stakeholder requirements.
* Verifying that all deliverables have been delivered and accepted.
* Validating exit criteria have been met.

For any updates to the Organizational process assets, Project Manager/Project lead has to send the formal email to SQA about updates to the process assets and need to deploy the project specific files and lessons learned in the repository

## Lessons Learned and Historical Information for the Projects

Lessons learned are documented by all the project team members and also by all the stakeholders, so they can become part of the historical databases for both the project and the organization. Lessons learned knowledge base contains historical information which includes –

* + Root causes of variances.
  + The reasoning behind the corrective action chosen.
  + Other information on schedule, cost, quality, scope, risks and issues.
  + Project successes and failures

## List of project documents which needs to be archived

* Project Charter.
* Project Management Plan and Sub plans.
* Scope documentation.
* Estimation sheets.
* WBS.
* Project schedule.
* Metric sheets.
* Audit Findings.
* Training Materials.
* Reusable components.
* Project Management Control Documents
* Meeting notes.
* Status reports.
* Contract files.
* Technical Documents.
* All Checklists.
* Information that had been placed under configuration control.
* Lessons Learned.
* Best practices from the project.
* Post-project Review/evaluation.

# Best Practices:

The following approaches are recommended best practice to practice Organizational Process Assets:

* **Involve all the Stakeholders** - Involve all project participants and stakeholders and gather lessons learned.
* **Archive Data and use project files as a Reference** - Archive all project data in a central repository. Include best practices, lessons learned, and any other relevant project documentation and use them for future reference.
* **Phased Close-Out** - The project closing process is generally phased over a period of time, rather than being a single event. Depending on the project type, project close out can begin as deliverables are completed, iterations/phases closed, or at the end of the project. The project manager must ensure that the sponsor and steering committee understand and support the project closing process to reduce final project implementation risks.
* **Share Lessons Learned** – Use lessons learned for future projects in the organization.

**Estimation sheets:** Use estimations for projects which has similar complexity and size for the better estimations

**5. Related Templates/Tools**

* Lessons Learned / Closure reports (Post Project Survey).
* Project Closure Checklist.