Process Tailoring Guidelines

Version 1.1

**Revision History**

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| --- | --- | --- | --- | --- | --- |
| Version (x.y) | Date of Revision | Description of Change | Reason for Change | Affected Sections | Approved By |
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**Approval History**

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# Introduction

This document defines the guidelines for tailoring the process documents/templates. Any changes to the document templates not listed should be with the approval of SEPG.

# Process Scope

Applies to the Development, Maintenance and QA projects in Company Name

# Process Tailoring

| **Process** | **Tailoring** |
| --- | --- |
| Project Initiation | This process should be followed before initiating the project with or without the formal contract. |
| Configuration Management | Baseline audits need not be conducted if the configuration management is done at the customer’s site. |
| Requirements Document | Requirements can be in form of SRS, SFS, Use Cases. The requirements can be in a single document or multiple or merged with other documents like Design or Scope document |
| Metrics | Project specific process and product goals, which may differ from the organizational goal, can be defined in the Quality Plan and shall be monitored continuously.  If the project is using organization goals, then it need not be described in the PMP |
| Meeting minutes (MOM) | Can be in a free form, if at least the following is maintained:   1. Date of the meeting 2. Minutes recorded by 3. Action items 4. Owner 5. Closure date |
| RTM | RTM template can be modified to suit the project needs, but should be able to exhibit the traceability from requirements to test cases. |
| Project Plan | Project plan can be made in either of tools like Microsoft Power-point, Excel, Word or client provided tools.  Also the project plans for project can be in different formats for different milestones / phases of the project. For ex : In testing phase, Bugzilla can be used for work allocation |
| Document format | The tabular MS-Word templates can be converted to MS-Excel templates without changing the data, for ease of use. Ex: RTM, Review Form etc. |
| Estimates | The task level estimates can be maintained in effort of person days, person hours. |
| Status Reports | The weekly or monthly status reports to the client can be as per the customer specific format. However the report should contain   1. Week Start/Ending date 2. Planned tasks for the week 3. Status of the planned tasks 4. Tasks planned for the next week 5. Issues and risks to be communicated, if any |
| IQA Schedule | Schedule for IQA can be made and sent as meeting invite, task calendar or placed in intranet page. |