Process Tailoring Guidelines

Version No: 1.2

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**Revision History**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Version (x.y) | Date of Revision | Description of Change | Reason for Change | Affected Sections | Approved By |
| 1.1 | 10/08/2018 | Baseline Version |  |  | Nagoor Inaganti |
| 1.2 | 10/10/2018 | Tailoring of Lifecyle | Tailoring to match business need | Lifecycle Model | Nagoor Inaganti |

**Approval History**

|  |  |  |  |
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| 1.1 | Sravanthi Yerramsetti | Eswara Prasad Gatamaneni  10/8/2018 | Nagoor Inaganti 10/8/2018 |
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# Purpose

Purpose of the Process Tailoring Guidelines is

* To tailor the Standard Processes of Tanvi IT Solutions Inc to the Red Turf project specific processes and document the same in the Project Management Plan.
* By doing the above, project plan may address any specific characteristics of a project that are different from the Standard Processes of Tanvi IT.

# Scope

The scope of process tailoring is applicable to projects managed and controlled at Tanvi IT.

# Guidelines Description

Tailoring is the process of modifying the Organization’s standard process to obtain a project defined software process that is suitable for the business or technical needs of the project.

Typically tailoring can be viewed as the process of adding, deleting or modifying the activities of a process, such that the resulting process is better suited for executing the project.

Process tailoring guidelines define the permissible rules for modifying the standard procedures and implementing them as per the scope of a project. Tailoring guidelines try to capture the experience and judgment of people regarding how tailoring can be done effectively.

Project Characteristics

Tailoring Guidelines

Project specific process

Standard Processes

## Projects Categorization

Projects in Tanvi IT are categorized as Large, Medium and Small based on the criteria given below:

| **Estimated Effort** | **Estimated Duration of the Project** | | | |
| --- | --- | --- | --- | --- |
| **<=2M** | **<=5M** | **<=10M** | **>10M** |
| <10 PM | SMALL | SMALL | SMALL | NA |
| 10 to 25 PM | SMALL | MEDIUM | MEDIUM | MEDIUM |
| 25 TO 50 PM | MEDIUM | MEDIUM | MEDIUM | LARGE |
| >50 PM | LARGE | LARGE | LARGE | LARGE |

## Tailoring Guidelines

For LARGE projects, process Tailoring is not allowed. For SMALL and MEDIUM projects, some amount of Tailoring is allowed as given in the following sections. If there is any deviation required other than what has been specified, the deviation must be documented in the Project Management Plan and should obtain the approval from SQA/ Head-Quality.

## Tailoring Guidelines for SMALL Projects

For small projects, all the features of process like planning, requirement analysis, design, configuration management etc. are as important as in large projects.

The following is the tailoring that can be done for projects categorized as Small Projects at different phases of the project life cycle:

| **Phase** | **Activities Involved** | **Can be Tailored (Yes/No)** | **Details of tailoring that can be made** |
| --- | --- | --- | --- |
| Project Initiation and Planning | Preparation of PIN | No |  |
|  | Conduct Project Kickoff meeting | Yes | This meeting need not be conducted for pilot/ POC projects with duration of less than 3 weeks. |
|  | Preparation of PMP | No | These plans can be combined into one document without losing the table of content. |
|  | Preparation of CMP | No |
|  | Preparation of QMP | No |
|  | Preparation of detailed project schedule | Yes | Project schedule can be tailored based on the change requests |
|  | Review of PMP, CMP, QMP | Yes | Documents can be tailored based on business requirements |
| Requirements | Preparation of SRS Document | Yes | SRS document can be tailored based on changes in the software requirements |
|  | Review of SRS | No |  |
| Design | Preparation of High-Level Design Document | Yes | These plans can be combined into one document without losing the table of content. |
|  | Preparation of Detailed Design Document | Yes |
|  | Review of Design | Yes | Design process can be tailored based on the design plan |
|  | Preparation of Unit test Plans | Yes | Unit test plans can be tailored using different test case scenarios |
|  | Preparation of Integration test Plans | Yes | Integration test plans can be tailored based on the client’s need. |
|  | Preparation of System test plans | Yes | System test plans can be tailored based on the business requirement. |
|  | Review of Test plans | No |  |
| Coding | Coding of items | Yes | Coding is tailored based on the design plan |
|  | Review by independent team of every item | No |  |
| Testing | Unit testing | Yes | Unit test plans can be tailored using different test case scenarios |
|  | Independent Integration testing | Yes | Integration test plans can be tailored based on the client’s need. |
|  | Independent System testing | Yes | System test plans can be tailored based on the business requirement. |
| Configuration management | Appoint a CC | No |  |
|  | Define baseline criteria | Yes | Baseline criteria is tailored based on client requirements. |
|  | Define directory structure | No | The directory is structured and doesn’t have to be tailored. |
|  | Track configuration items for changes | Yes | Track requests are tailored based on the changes. |
|  | Conduct status accounting and audits | Yes | Audits are documented and tailored based on the business requirements |
| Quality Assurance | Status Review meetings | Yes | Meetings are tailored according to the communication meetings. |
|  | Causal Analysis | Yes | Analysis is tailored based on requirement. |
|  | Metrics collection and analysis | Yes | Metrics collection and analysis are based on the design plan. |
| Customer feedback | Capturing Customer feedback and analysis | No |  |
| Project Closure | Project Closure Report preparation | No |  |
|  | Project closure Meeting | No |  |

## Tailoring guidelines for Migration Projects

| **Phase** | **Activities Involved** | **Can be Tailored (Yes/No/NA)** | **Details of tailoring that can be made** |
| --- | --- | --- | --- |
| Project Initiation and Planning | Preparation of PIN | No |  |
|  | Conduct Project Kickoff meeting | Yes | This meeting need not be conducted for pilot/ POC projects with duration of less than 3 weeks. |
|  | Preparation of PMP | No | These plans can be combined into one document without losing the table of content. |
|  | Preparation of CMP | No | These plans can be combined into one document without losing the table of content. |
|  | Preparation of QMP | No | These plans can be combined into one document without losing the table of content. |
|  | Preparation of detailed project schedule | Yes | Project schedule can be tailored based on the change requests |
|  | Review of PMP, CMP, QMP | Yes | Documents can be tailored based on business requirements |
| Requirements | Preparation of SRS Document | Yes | SRS document can be tailored based on changes in the software requirements |
|  | Review of SRS |  |  |
| Design | Preparation of High-Level Design Document | Yes | These two documents can be clubbed into one document as Integrated Design Document |
|  | Preparation of Detailed Design Document | Yes |
|  | Review of Design | No |  |
|  | Preparation of Unit test Plans | Yes | Unit test plans can be tailored using different test case scenarios |
|  | Preparation of Integration test Plans | Yes | Integration test plans can be tailored based on the client’s need. |
|  | Preparation of System test plans | Yes | System test plans can be tailored based on the business requirement. |
|  | Review of test plans | No |  |
| Coding | Coding of items | Yes | Coding is tailored based on the design plan |
|  | Review by independent team of every item | No |  |
| Testing | Unit testing | Yes | Unit test plans can be tailored using different test case scenarios |
|  | Independent Integration testing | Yes | Integration test plans can be tailored based on the client’s need. |
|  | Independent System testing | Yes | Independent system tests can be tailored depending on the test plans. |
| Configuration management | Appoint a CC | Yes | Configuration controller tailors the project based on the change requests. |
|  | Define baseline criteria | Yes | Baseline criteria is defined and tailored based on the business requirement. |
|  | Define directory structure | No |  |
|  | Track configuration items for changes | Yes | Configuration controller tracks all the changes |
|  | Conduct status accounting and audits | Yes | Audits are tailored based on the change requests. |
| Quality Assurance | Status Review meetings | Yes | Meetings are structed based on the communication plan. |
|  | Causal Analysis | Yes | Analysis is tailored based on requirement. |
|  | Metrics collection and analysis | Yes | Metrics collection and analysis are based on the design plan. |
| Customer feedback | Capturing Customer feedback and analysis | No |  |
| Project Closure | Project Closure Report preparation | No |  |
|  | Project closure Meeting | No |  |

## Template related tailoring guidelines

The list of the standard templates to be used across the organization is defined in the QMS.

Template related to tailoring of QMS processes might be carried out by projects whenever the project is expected to use templates supplied by the customer for ease of reporting and uniformity of usage.

# References

None