Instruction

This document is used to define the phases, and documents in each phase, which will be used for your project. In addition, this document provides a mechanism for appropriate parties to sign-off on each phase as it is satisfactorily completed.

The assigned project manager should complete this document prior to starting any project. The completed form should be reviewed and approved by designated authorities prior to starting the project.

Project Name:

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| --- | --- |
| **Project Name** | **Requesting Department or College** |
|  |  |

Project Manager:

|  |  |
| --- | --- |
| **Name** | **Title/Department** |
|  |  |

Authorized Approvers (add more lines, if needed):

|  |  |
| --- | --- |
| **Name** | **Title/Department** |
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Phase and Document Selection

Please check off the phases and documents you plan to use for this project, using the following chart. Please provide a brief explanation if you choose not to use a particular phase or document. Your explanation should provide a clear business reason for not using any element of the Project Management Framework.

|  |  |  |  |
| --- | --- | --- | --- |
| **CHECK (USING)** | **PHASE** | **DOCUMENT/TEMPLATE** | **COMMENTS** |
|  | 01\_Intake & Prioritization | Project Request Form |  |
|  | 02\_ Inception | Getting Started |  |
|  | 02\_ Inception | Project Prioritization Scoring Worksheet |  |
|  | 02\_ Inception | High-Level Technical Design Template |  |
|  | 02\_Inception | Budget Estimate |  |
|  | 03\_Project Charter | Project Charter Template |  |
|  | 04\_Project Kick-off | Kick-off Planning Template |  |
|  | 04\_Project Kick-off | Sample Project Timeline |  |
|  | 05\_Requirements & Design | Business Requirements Analysis |  |
|  | 05\_Requirements & Design | Detailed Technical Design Template |  |
|  | 05\_Requirements & Design | Reporting Requirements Template |  |
|  | 06\_Planning | Planning Process Guidelines |  |
|  | 06\_Planning | Sample Project Plan Template |  |
|  | 06\_Planning | Security and Risk Plan |  |
|  | 06\_Planning | Master Test Plan |  |
|  | 06\_Planning | Change Control Plan |  |
|  | 06\_Planning | Transition Plan |  |
|  | 06\_Planning | Support Services Plan |  |
|  | 06\_Planning | Marketing Communications Plan |  |
|  | 06\_Planning | Budget Plan |  |
|  | 07\_Execution | Issue Management Template |  |
|  | 07\_Execution | Status Report Template |  |
|  | 08\_Testing | Test Strategy |  |
|  | 08\_Testing | Performance Test Strategy |  |
|  | 08\_Testing | Test Issue Tracking Guidelines |  |
|  | 08\_Testing | Test Issue Tracking Template |  |
|  | 09\_Training | Sample Training Evaluation |  |
|  | 09\_Training | Training Preparation Checklist |  |
|  | 10\_Deployment | Deployment Sign-off Template |  |
|  | 10\_Deployment | SLA Template |  |
|  | 11\_Post-Implemtnation | Evaluation and Lessons Learned |  |
|  | 12\_Change Control | Change Request & Signoff Form |  |
|  | 12\_Change Control | Sample Change Request Log |  |

All project-specific documents should be saved on the designated location in Depot using the following naming convention: “document name\_project name\_vXXXXXX” where XXXXXX = the most recent revision date.

Review and Approval

This section is used to obtain approval on the choices made in the chart above. The individual who reviews and approves the phase and document selection should sign below.

Name of Reviewer/Approver:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Reviewer/Approver:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date Approved:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phase Completion Approval and Sign-off

Using the chart below, capture proper sign-off from authorized approvers (listed above) at the completion of each phase. The next phase of the project should not start before sign-off on the prior completed phase is obtained in this document.

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| Project Phase | Approval | Sign-off | Date |
| Intake & Prioritization | 🞏Approved | Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| Inception | 🞏Approved | Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| Project Charter | 🞏Approved | Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| Project Kick-off | 🞏Approved | Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| Requirements & Design | 🞏Approved | Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| Planning | 🞏Approved | Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| Execution | 🞏Approved | Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| Testing | 🞏Approved | Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| Training | 🞏Approved | Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| Deployment | 🞏Approved | Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| Post-implementation | 🞏Approved | Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| Change Control | 🞏Approved | Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |

Document Tracking

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| --- | --- | --- |
| Date | Action Taken | By Whom |
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