

**裁剪指南**

文档版本号：1.0

Document Version: 1.0

日期：年-月-日

Date: <dd month, yyyy>

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文档概述Document Overview

目的Purpose

本文档为组织的现有过程的裁剪提供指南，以满足项目需求。

This document provides guidelines for tailoring organization’s existing processes to suit project requirements.

适用范围Scope

本文档适用于SunGard China 的所有项目。

This document is applicable to all projects at SunGard China.

目标读者Intended Audience

本文档主要为项目团队和SQA提供参考借鉴。

This document is primarily for the reference of project team and SQA

缩写和定义Acronyms and Definition

|  |  |
| --- | --- |
| 缩写/术语Acronym/Term | 定义Definition |
| <PD | 人天Person Days |
| PL | 项目主管Project Leader |
| PM | 项目经理Project Manager |
| PMP | 项目管理计划Project Management Plan |
| SQA | 软件质量保证Software Quality Assurance |
| QMS | 质量管理系统Quality Management System |
| VP | 副总裁Vice President> |

裁剪指南Tailoring Guidelines

裁剪事件Tailoring Events

过程可以在如下的大事件或者场景中进行裁剪：

Process can be tailored at following events or scenarios:

| 编号  Sr. No. | 裁剪场景  Tailoring Scenarios | 描述  Description | 采取行动  Action to be taken |
| --- | --- | --- | --- |
| 1 | 客户特定过程Customer specific processes | 客户可能会坚持走他们的质量过程，这些过程可能与组织特定的过程有差异  Customer may insist on following their Quality Processes which could be different from the Organization specific process. | 在这样的情况下，需要双方对偏差达成一致，并在《裁剪检查表》或者《项目管理计划》文档中做简明扼要的记录。  In such cases, deviation need to be mutually agreed upon and recorded explicitly in the Tailoring Checklist or the Project Management Plan document.  偏差不应该过滤在组织质量管理系统中定义的最基本的过程。偏差可能取代组织质量管理系统过程文档。  Deviation should not dilute the basic minimum processes as defined in organization quality management system. Deviation could be replacing organization quality management system process document. |
| 2 | 项目特殊过程Project Specific Processes | 如果项目有属于自己的工作指南或者过程详情，比如说，构建流程，那么这些指南或详情应该融入过程中。  If project is having its own set of work instructions or process details, for example, Build Procedure then those shall be incorporated in the process. | 在这些情况下，工作指南或者过程详情可能会部分或者全部当作单独的文档进行维护，应该在《裁剪检查表》或者《项目管理计划》文档中记录偏差情况。  In such cases, work instructions or process details could be partially or fully maintained as a separate document and deviation shall be recorded in the Tailoring Checklist or the Project Management Plan document. |
| 3 | 阶段性进行的项目工作  Project work carried out in phased approach | 在某些情况下，项目可能根据客户的需求采取阶段性交付的办法执行，--可能按照交付物、在每个阶段进行的不同等级的测试等等进行阶段划分。  In some cases, project may get executed in a phased delivery approach based on customer’s requirement – Phasing could be in terms of deliverables, level of testing done at each stage and so on. | 应该按照组织质量管理系统中的交付物和过程，定义适用于项目相关阶段的交付物和过程。  Such projects shall define deliverables and processes as applicable to the relevant phase(s) of the project, as derived from organization quality management system. |
| 4 | 工具实施  Tool Implementation | 项目因为特定活动使用工具或者某些工具的实施可能会改变过程活动。  Project is using Tool for certain set of activities   * Or -   Decision pertaining to implementing tool for certain activities may change the process activities. | 在这些情况下，《项目管理计划》或者《裁剪检查表》应该包括工具所涵盖的详情和活动的偏差。  In such cases, Project Management Plan or Tailoring Checklist shall cover deviation in terms of the tool details and activities that are covered by tool. |
| 5 | 有限的资源  Limited number of resources | 团队和项目中仅有一个或者两个，并且项目由客户管理。  There are only one or two resources in the team and project is managed by Customer. | 在这样的情况下，应该实施核心过程。对于剩下的过程，过程咨询师、项目团队应该做出决定并更新裁剪检查表。  In such cases, core processes shall be implemented. For remaining processes, Process Consultant, project team shall take a decision and update the Tailoring checklist with the details. |

裁剪元素Tailoring Elements

政策Policy

|  |  |  |
| --- | --- | --- |
| 裁剪类型  Tailoring Type | 批准人Approver | 限制/条件  Limits/Conditions |
| 删除或者修改  Exclusion or modification | - | 不允许  Not allowed |

过程Process

| 裁剪类型  Tailoring Type | 批准人Approver | 限制/条件  Limits/Conditions |
| --- | --- | --- |
| 删除整个过程  Exclusion of a whole process | <过程主管>  <Process Lead> | 如果过程在SGC项目/客户的适用范围之外，那么只能删除过程。  If the process is out of scope of SunGard China project / Client engagement then only the process can be excluded.  如果过程被删除，过程下的相应模板会自动地被删除。  If the process is excluded, the corresponding templates under process will automatically be excluded. |
| 用替代过程替换Replacement by a alternate process | <过程主管>  <Process Lead> | 需由客户要求并得到双方同意，并应与SunGard China的各项政策保持一致。项目有责任通过恰当的裁剪将过程整合到组织的质量管理系统。如果替代过程是由产品线开发的，建立在实践的基础之上的最佳过程，同样要得到<SEPG>的批准并作为试用过程实施。  If requested by the customer and mutually agreed upon.  Compliance with all SunGard China policies should be maintained. The project is responsible for integrating the process with the Organization quality management system through the proper tailoring.  - Or -  If alternate process is a best practices-based process developed by the product line, same to be approved by <SEPG> and implemented as a pilot. |
| 增加新的过程  Adding a new process | <过程主管>  <Process Lead> | 如果现有的过程没有覆盖，并与现有的政策或者过程不冲突，允许增加新的过程。  Allowed if not covered by existing process, and does not contradict any existing policy or process. |
| 细化过程  Elaborating Process | <过程主管>  <Process Lead> | 允许  Allowed |
| 删除入口准则Excluding Entry Criteria conditions | - | 不允许  Not allowed |
| 增加新的入口准则  Adding new Entry Criteria conditions | <过程主管>  <Process Lead> | 允许  Allowed |
| 删除出口准则  Excluding Exit Criteria conditions | - | 不允许  Not allowed |
| 增加新的出口准则  Adding new Exit Criteria conditions | <过程主管>  <Process Lead> | 允许  Allowed |
| 更改和增加过程验证Changing/adding Process verification | <过程主管>  <Process Lead> | 如果现有的过程没有覆盖，同时与现有的政策或者过程不冲突，允许更改和增加过程验证。  Allowed if not covered by existing process, and does not contradict any existing policy or process. |
| 修改流程图Modifying Flowchart | <过程主管>  <Process Lead> | 只在反映过程中的有效变更的时候才允许  Allowed only to reflect valid changes in the process. |
| 增加相关文档、支持文档或者相关过程  Adding Related Documents, Supporting Documents, or Related Processes | <过程主管>  <Process Lead> | 允许  Allowed |

活动Activity

| 裁剪类型  Tailoring Type | 批准人Approver | 限制/条件  Limits/Conditions |
| --- | --- | --- |
| 增加一个新的活动Adding a new activity | <过程主管>  <Process Lead> | 允许  Allowed |
| 删除一个活动  Excluding an activity | <过程主管>  <Process Lead> | 如果活动与项目无关，允许删除一个活动，条件是这个删除不改变过程的基本原则。  Exclusion is allowed if the activity is irrelevant to the project, and provided that such exclusion does not change the basic principles of the process.  应该在《裁剪检查表》或者《项目管理计划》记录活动删除原则  A rationale should be documented in the Tailoring Checklist or Project Management Plan for exclusion. |
| 修改活动名称  Changing activity Name | - | 不允许  Not allowed |
| 输入-增加输入  Inputs – Adding inputs | <过程主管>  <Process Lead> | 允许  Allowed |
| 输入-删除输入  Inputs – Deleting an input | <过程主管>  <Process Lead> | 允许  Allowed |
| 修改输入名称  Changing Input Name | <过程主管>  <Process Lead> | 允许  Allowed |
| 细化输入描述  Elaborating on Input Description | <过程主管>  <Process Lead> | 允许  Allowed |
| 过程活动-增加一个任务  Process Activities – Adding a task | <过程主管>  <Process Lead> | 允许  Allowed |
| 过程活动-删除一个任务  Process Activities – Deleting a task | <过程主管>  <Process Lead> | 只有活动不相关时，才允许删除任务  Allowed only, if irrelevant |
| 过程活动-细化任务以解释如何实施任务，如何建立活动参数。  Process Activities – Elaborating the description of a task to explain how to implement it, in particular setting up activity parameters. | <过程主管>  <Process Lead> | 允许  Allowed |
| 删除输出（工作产品）Exclusion of an output (work product) | <过程主管>  <Process Lead> | 如果在活动中规定为任选或者由一个替代工作产品替代，该工作产品由两个或者两个以上的最初工作产品组成，则允许  Allowed if: It is specified in the activity as optional.  - Or - It is replaced by an alternate work product consisting of two or more original work products |
| 增加输出  Addition of an output | <过程主管>  <Process Lead> | 允许  Allowed |
| 更改输出标题  Changing output title | <过程主管>  <Process Lead> | 增强型工作产品时允许  Allowed for a consolidated work product. |
| 更改角色和职责Changing Roles & Responsibilities | <过程主管>  <Process Lead> | 如果为了适应项目组织结构，可以调整。  Roles can be adapted to the Project’s organization, provided the required authority and expertise are maintained. |

模板Template

| 裁剪类型  Tailoring Type | 批准人Approver | 限制/条件  Limits/Conditions |
| --- | --- | --- |
| 用新的模板替换Replacement by a new template | <过程主管>  <Process Lead> | 由于客户的要求或者原来模板中的所有方面都涉及。  Per customer’s requirement  - Or -  If all aspects of original skeleton are covered. |
| 删除  Exclusion | <过程主管>  <Process Lead> | 如果项目允许两个以上的方式文档化或者根据过程可选择  If process allows for more than one way of documentation  - Or -  If optional, according to the process |
| 修改  Modifications | <过程主管>  <Process Lead> | 省略框架中规定的任选部分或者视需要，增加更多章节  Omitting optional sections specified in the skeleton  - Or -  Adding additional sections as deemed necessary |

检查表Checklist

| 裁剪类型  Tailoring Type | 批准人Approver | 限制/条件  Limits/Conditions |
| --- | --- | --- |
| 用替代检查表替代Replacement by alternate checklist | <过程主管>  <Process Lead> | 由于客户的要求或者原来模板中的所有方面都涉及。  Per customer’s requirement  - Or -  If all aspects of original skeleton are covered. |
| 删除  Exclusion | <过程主管>  <Process Lead> | 如果根据过程可选，或者评审人经验丰富不需要检查表  If optional according to the process  - Or -  Reviewer is experienced and do not need checklist |
| 修改  Modifications | <过程主管>  <Process Lead> | 省略NA（不适用）问题或者视需要，增加更多问题  Omitting NA questions  - Or -  Adding additional questions, as necessary |

裁剪流程Tailoring Procedure

裁剪流程图Tailoring Flow Chart



裁剪步骤Tailoring Steps

* 阅读裁剪指南，理解裁剪步骤Read the tailoring guideline and understand the steps involved in tailoring.
* 使用裁剪检查表识别适用的组织过程Identify applicable Organization processes using tailoring checklist.
* 识别项目已定义的工作产品Identify the artifacts that are already defined by the project.
* 确定用以完成特定项目活动的工具Identify the tools used to complete the project specific activities.
* 找出组织过程和项目过程之间的区别Identify differences between Organization and project processes.
* 识别需要裁剪的要素（参考《裁剪要素》章节）Identify the elements where tailoring is needed (Refer Section Tailoring Elements).
* 在《裁剪检查表》中记录裁剪的具体情况Record the tailoring details in the Tailoring Checklist.
* <过程顾问>评审裁剪检查表<Process Mentor> reviews Tailoring checklist.
* <项目总监>和<过程主管>评审和批准《裁剪检查表》<Director-Projects> and <Process Lead> review and approve Tailoring Checklist.
* 根据《配置管理计划》中的规定，保存项目特殊的裁剪过程Store project specific tailored processes as defined in Configuration Management Plan.
* SQA在进行SQA审计之前应该参考裁剪检查表SQA shall refer the tailoring checklist before conducting SQA audits.

项目裁剪常见问题FAQs for Project tailoring

什么是裁剪？What is Tailoring?

软件开发中的裁剪指的是从已经建立了的过程、任务和工作产品的组织中提取一组过程、任务和工作产品的过程以最佳地适应项目，进而达到项目的目标。

Tailoring in software development is the process of extracting a set of processes, tasks and artifacts from the organizations established processes, tasks and artifacts so as to best suit a project to achieve its objectives.

裁剪时按照您的项目的适用性增加或者修改.可按照如下方式记录裁剪：

Tailoring is the activity that adds / modifies certain set of activities as per applicability of your project. Tailoring can be recorded as follows:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 编号# | 过程名称  Process name | 过程步骤  Process step | 裁剪详情  Tailoring details | 裁剪原因  Reason of tailoring |
|  |  |  |  |  |

如：过程活动需要获得<副总裁>对项目管理计划的批准。但是，就一个项目而言，<副总裁，项目总监>应该批准项目管理计划。这是活动级的裁剪。

E.g. Process Activity requires <VPs> approval on project management plan. However in case of a project the <VP, Director-Projects> shall approve the project management plan. This is activity level tailoring.

所有类型的改进活动需要进行单元测试。但是，<项目经理>决定只对大的改进点执行单元测试。这也是活动级的裁剪。

Process activity requires Unit Testing to be done for all types of enhancements. However, <PM> decides to perform unit testing for only large enhancements. This again shall be activity level tailoring.

过程定义三种类型的输出，如周报，项目状态报告，里程碑状态报告，但是项目还保存一个类型的报告作为项目状态季报。在此情况下，输出的清单上应该有4个类型的状态的报告。这应该是对输出的裁剪的补充。

Process defines 3 types of outputs like weekly status report, project status report, milestone status report, but project maintains one more type of report as quarterly project status report. In this case, list of outputs shall be having 4 types of status reports. This shall be addition of output type of tailoring.

什么是豁免？What is Waiver?

软件开发中的豁免是不执行某一特定项目或子项目的一组过程、任务、工作产品的过程。Waiver in software development is the process of not implementing the set of processes, tasks, artifacts for the given project or subproject.

比如说，如果UAT过程和构建&发布过程在SunGardChina项目范围之外，因此，这些活动不应该在SunGardChina中执行而应该为一个豁免的请求。

For example, if UAT process and Build & Release process is outside SunGard China project scope. So, these activities shall not be executed at SunGard China and shall be a waiver request.

什么可以裁剪？What can be tailored?

描述过程如何执行的，如：阶段或者活动的数量、角色和职责、文件格式、形式、报告或者评审的频率等可以进行裁剪。

Attributes that describes how the process is performed like, number of phases or activities, roles and responsibilities, document formats, formality, frequency of reports or reviews can be tailored.

如果我的项目太小，如只有2PD或者7PDs，那情况又如何？适合我的过程有哪些？What if my project is too small like 2 PDs or 7 PDs? What all processes shall be applicable for me?

在这样的情况下，项目的启动、计划和结项过程应该视为可适用的。

In this case, Project Initiation, Planning and Closure processes shall be applicable.

我们可以裁剪检查表吗？Can we tailor the checklists?

是的，您可以裁剪检查表。检查表可以根据项目的需求进行裁剪。您可以根据你的需求，增加，删除或者修改检查表。组织级检查表可以作为参考使用。

Yes, you can tailor the checklists. Checklists can be tailored based on the project’s requirement. You can add, remove or modify the checklists as per your requirement. Organization checklists can be used as reference.

文档控制

Document Control

|  |  |  |  |
| --- | --- | --- | --- |
| 标题  Title | 裁剪指南 | | |
| 标识符  ID | TMP\_过程 | | |
| 版本号  Version No. |  | 有效日期  Effective Date | 2010-08-02 |

文档修订历史

Document History

<本表格含有对过程文档所做的修订历史。>

<This table contains a history of the revisions made to this process document.>

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 版本号  Version No. | 修订日期  Date | 变更理由  Reason for change | 作者Author | 评审人Reviewed by | 批准人  Approved by |
| 1.0 |  | 创建  Initial Draft | CoE-PPM | Vivek Kulkarni |  |
|  |  |  |  |  |  |

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