**Scope Statement and Project Management  
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**Purpose:**

The purpose of this document is to provide a unique project document including the scope and project management policies.

Table of contents

[1. Scope Management 4](#_Toc447097556)

[1.1. What is covered 4](#_Toc447097557)

[1.2. What is not covered 4](#_Toc447097558)

[1.3. WBS - Work Breakdown Structure 4](#_Toc447097559)

[1.3.1. WBS Schema 4](#_Toc447097560)

[1.3.2. WBS Dictionary 4](#_Toc447097561)

[1.4. List of deliverables 4](#_Toc447097562)

[1.5. Risks, Dependencies, Constraints 4](#_Toc447097563)

[1.6. Change Request Procedure 4](#_Toc447097564)

[1.7. Acceptance Procedure 4](#_Toc447097565)

[2. Project Management 4](#_Toc447097566)

[2.1. Assignment of roles 4](#_Toc447097567)

[2.2. Project Follow up and Reporting 4](#_Toc447097568)

[2.3. Tolerance Levels 4](#_Toc447097569)

[2.4. Effort and timeframe 4](#_Toc447097570)

[2.5. Detailed Schedule – First baseline 4](#_Toc447097571)

[2.6. Documentation Management 4](#_Toc447097572)

[2.6.1. Storage and classification 4](#_Toc447097573)

[2.6.2. Naming convention 4](#_Toc447097574)

[2.7. Quality Management 4](#_Toc447097575)

[2.8. Communication Management 4](#_Toc447097576)

[2.8.1. Communication Matrix 4](#_Toc447097577)

[2.8.2. Other Communication Aspects 4](#_Toc447097578)

[2.9. Description and frequency of meetings 4](#_Toc447097579)

[2.10. Risk Management 4](#_Toc447097580)

[2.11. Procurement Management 4](#_Toc447097581)

[3. Annex - Document control 4](#_Toc447097582)

[3.1. Circulation 4](#_Toc447097583)

[3.2. Change history 4](#_Toc447097584)

[3.3. Applicable documents 4](#_Toc447097585)

[3.4. Reference documents 4](#_Toc447097586)

[3.5. Glossary 4](#_Toc447097587)

[3.6. Usage conventions 4](#_Toc447097588)

[4. Other Annexes 4](#_Toc447097589)

[4.1. Contingency Plan (IT projects only) 4](#_Toc447097590)

[4.2. Transition Plan 4](#_Toc447097591)

# Scope Management

This section identifies exactly what the project does and does not cover (it is advisable to provide a functional architecture chart). The description of the project and its related objectives are included in the 'Project Charter' (see 3.3).

## What is covered

User interface - editor

Storage

Rendering

Exchange platform

## What is not covered

Pre-adoption finalisation that will be managed in a separate, subsequent, project

## WBS - Work Breakdown Structure

According to the PMBOK Guide, a Work Breakdown Structure (WBS) is a hierarchical decomposition oriented to the deliverables and of the work to be carried out in order to accomplish the project objectives. The WBS can be done with Excel, Visio or any relevant tool with a dedicated dictionary.

1. Package 1 -
2. Package 2 -
3. Package 3 -
4. Package 4 -

### WBS Schema

### WBS Dictionary

The WBS dictionary is a document that provides detailed deliverable, activity, and scheduling information about each component in the WBS. The WBS dictionary is a document that supports the WBS. Information in the WBS dictionary may include, but is not limited to:

* Identifier,
* Description of work,
* Assumptions and constraints,
* Responsible organisation,
* Schedule milestones,
* Associated schedule activities,
* Resources required,
* Cost estimates,
* Quality requirements,
* Acceptance criteria,
* Technical references and Agreement information.

## List of deliverables

The list of the deliverables is included in the Communication Matrix (cf.**2.8.1**2.8).

## Risks, Dependencies, Constraints

## Change Request Procedure

This section describes the resources deployed to deal with changes while the project is under way (change requests, new requirements etc.). It comprises all the necessary procedures, resources and steps to be taken in order to respond to change requests. It also defines everyone’s responsibilities.

Use of PMM4EP Change Request Procedure and Form

In the case of another procedure, please describe it:

## Acceptance Procedure

Use of **PMM4EP** - Acceptance procedure and report

In case of another procedure is used, please describe it:

# Project Management

This chapter describes the organisation set up to carry out the project through the project’s actors and committees.

## Assignment of roles

| **Role** | | **Steering Committee** | **Name/Initials** | | **DG or Company** |
| --- | --- | --- | --- | --- | --- |
| **Business** | Sponsor | Y |  |  |  |
| Project Owner | Y |  |  |  |
| Business Analyst | Y/N |  |  |  |
| Key user | Y/N |  |  |  |
|  |  |  |  |  |
| **IT** | Project Manager | Y |  |  |  |
| Functional analyst | Y/N |  |  |  |
| Developer | Y/N |  |  |  |
| Tester | Y/N |  |  |  |
|  |  |  |  |  |
| **Other** |  |  |  |  |  |
|  |  |  |  |  |
| Contract Manager | Y/N |  |  |  |
| Permanent/LSA | Y/N |  |  |  |

## Project Follow up and Reporting

Use of **Clarity dashboard**

Use of **PMM4EP** project 'Dashboard' if Clarity Dashboard is not applicable

Justify:

**Clarity Project Survey**

Other:

Justify:

## Tolerance Levels

These thresholds are used for the Steering Committee escalation process, for more information see Project Governance Guide Ch. **3.4**.

|  |  |
| --- | --- |
| **Tolerance level** | **Description** |
| **Cost** | 0% overrun |
| **Time** | 0% overrun |
| **Risk** | Each risk must be mitigated and submitted to the SteerCo |
| **Change Request** | Each change request must be approved by the SteerCo |
| **…..** |  |

## Effort and timeframe

| **Phase / Iteration** | **Effort (man-days)** | **Deadline** |
| --- | --- | --- |
| Definition |  |  |
| Realisation |  |  |
| Iteration 1 |  |  |
| Iteration 2 to N |  |  |
|  |  |  |
| Closure |  |  |
| **Total** |  |  |

## Detailed Schedule – First baseline

This detailed schedule (Microsoft Project MPP or equivalent) must be provided. Please indicate the reference of the document in section 3.3.

## Documentation Management

### Storage and classification

All the PMM4EP's project documents (Project Management documents and IT documents) must be managed in a unique repository. Code or modules must be managed by a SCM (Source Control Management**)**. For more information, consult the MAQ (see 3.3).

|  |  |
| --- | --- |
| Standards.net repository:  Other:  Localisation (server):  Hierarchical Structure: | **Confluence**  please specify  please specify |

### Naming convention

If the naming convention in the project is different from the PMM4EP naming convention defined in the Quality Assurance Manual (see 3.3), it will have be specified and justified.

Use of EP naming convention

Or specify:

## Quality Management

Quality assessment is performed by the Project Manager itself (self-assessment). A quality Support can be requested [**Standards.net**](http://www.standardsnet.ep.parl.union.eu/standards/cms/Accueil/preconisations/P_Methodologie/Frm_Req_Prj).

Use of Project Quality Assessment (QA)

If QA not used, please describe your Quality Plan:

## Communication Management

This section informs those involved in the project to which deliverables must be sent.

It outlines distribution and approval circuits for every type of deliverable (product documents, follow-up documents, meeting minutes, reviews etc.) sent between all participants (precise the *Roles*: Client/Sponsor, Project Owner, Business Analyst, Project Manager, Functional Analyst, etc.).

### Communication Matrix

This matrix must be updated with all the deliverables required for executing the project.

| **Deliverables (use RACI[[1]](#footnote-1) code)** | | **Business Team** | | | **IT Project Team** | | | **Standards** | **Operations** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| *Role* | *Role* | *Role* | *Role* | *Role* | *Role* |
| Monitor and control | Schedule |  |  |  |  |  |  |  |  |
| Dashboard |  |  |  |  |  |  |  |  |
| Change Request Form |  |  |  |  |  |  |  |  |
| Steering Committee Minute |  |  |  |  |  |  |  |  |
| Quality Assessment |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| Initial Risks Assessment |  |  |  |  |  |  |  |  |
| Project Charter |  |  |  |  |  |  |  |  |
| Initial Environment Request (if required) |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| Definition Phase | Scope Statement and Project Management |  |  |  |  |  |  |  |  |
| Initial Risks Assessment (updated) |  |  |  |  |  |  |  |  |
| Tests Risks Analysis |  |  |  |  |  |  |  |  |
| Functional specification |  |  |  |  |  |  |  |  |
| Master Test Plan |  |  |  |  |  |  |  |  |
| Technical Architecture |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| Realisation phase and iterations | Functional specification (updated) |  |  |  |  |  |  |  |  |
| Technical Specification |  |  |  |  |  |  |  |  |
| Specific Test Plan |  |  |  |  |  |  |  |  |
| Tests Cases |  |  |  |  |  |  |  |  |
| Tests Report |  |  |  |  |  |  |  |  |
| User Findings Report (if required) |  |  |  |  |  |  |  |  |
| Acceptance Report |  |  |  |  |  |  |  |  |
| CarAp modelling Report (if required) |  |  |  |  |  |  |  |  |
| User Manual |  |  |  |  |  |  |  |  |
| Technical Architecture (updated) |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| Closure Phase | Project Review |  |  |  |  |  |  |  |  |
| Transfer of Knowledge |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

### Other Communication Aspects

## Description and frequency of meetings

|  |  |  |  |
| --- | --- | --- | --- |
| **Meeting** | **Participant** | **Frequency** | **Purpose** |
| Internal project meeting | Project team | Weekly | Weekly review, follow-up |
| Work meeting | Project team | Weekly | Resolving a problem, etc. |
| Follow-up meeting | Project team | Monthly | Project follow-up, planning adaptation |
| Steering committee meeting | Steering committee | Bi-monthly | Agenda and documents for the SteerCo must be sent **at least two days** before. |
|  |  |  |  |

## Risk Management

All the risks[[2]](#footnote-2) must be tracked according to the EP recommendations.

In case of another procedure is used, please describe it:

## Procurement Management

The purpose of this chapter is to describe which products will be acquired from external suppliers, as well as when they will be acquired. The plan includes:

* A breakdown of the products acquired from external suppliers, including a detailed description of each product;
* A plan giving the schedules for acquiring the products.

The term "product" is general and includes goods and services.

The following table gives a summary of the products and/or services needed to acquire for the project and the expected delivery date:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **ID** | **Product/Service description** | **Schedule** | **Budget** | **Contract Type** | **Supplier** |
| 1 |  |  |  |  |  |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |

# Annex - Document control

## Circulation

| **DG or Company** | **Role** | **Name/Initials** | | **RACI[[3]](#footnote-3) code** |
| --- | --- | --- | --- | --- |
|  | BUSINESS-Sponsor |  |  | **A** |
|  | BUSINESS-Project Owner |  |  | R |
|  | BUSINESS Analyst |  |  | C |
|  | IT-Project Manager |  |  | C |
|  | Data Protection Officer[[4]](#footnote-4) (DPO) |  |  | I |
|  | Key User |  |  | I |
|  |  |  |  |  |

By approving this document (''**A"** in the column "**RACI**"), key project stakeholders approve its content.

## Change history

| **Version number[[5]](#footnote-5)** | **Status[[6]](#footnote-6)** | **Date** | **Initials** | **Summary of changes** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |

## Applicable documents

Applicable documents are standards, specimen plans which need to be applied and whose application is verifiable.

| **N°** | **Document name** | **Description[[7]](#footnote-7)** |
| --- | --- | --- |
| [1] | Quality Assurance Manual (MAQ) | [MAQ](http://www.standardsnet.ep.parl.union.eu/standards/cms/Accueil/preconisations/P_Methodologie) |
| [2] | Project Mandate ( | With the selected business scenario selected  [PMM4EP Templates](http://www.standardsnet.ep.parl.union.eu/standards/cms/Accueil/preconisations/P_Methodologie/templates_pmm4ep) |
| [3] | Initial Risks Assessment (IRA) | [PMM4EP Templates](http://www.standardsnet.ep.parl.union.eu/standards/cms/Accueil/preconisations/P_Methodologie/templates_pmm4ep) |
| [4] | Project Charter (CHP) | [PMM4EP Templates](http://www.standardsnet.ep.parl.union.eu/standards/cms/Accueil/preconisations/P_Methodologie/templates_pmm4ep) |
| [5] | Project Schedule (MPP) | [PMM4EP Templates](http://www.standardsnet.ep.parl.union.eu/standards/cms/Accueil/preconisations/P_Methodologie/templates_pmm4ep) |
| [6] | Change Request Procedure | [PMM4EP Procedures](http://www.standardsnet.ep.parl.union.eu/standards/cms/Accueil/preconisations/P_Methodologie/guide-procedure) |
| [7] | Acceptance Procedure | [PMM4EP Procedures](http://www.standardsnet.ep.parl.union.eu/standards/cms/Accueil/preconisations/P_Methodologie/guide-procedure) |

## Reference documents

Reference documents a help or a support but are not directly applicable (e.g. software reference manuals, sample files from outside firms, meeting papers).

| **N°** | **Document name** | **Description** |
| --- | --- | --- |
| [1] | Project governance Guide | [PMM4EP Guides](http://www.standardsnet.ep.parl.union.eu/standards/cms/Accueil/preconisations/P_Methodologie/guide-procedure) |
| [2] | Scope Management Guide | [PMM4EP Guides](http://www.standardsnet.ep.parl.union.eu/standards/cms/Accueil/preconisations/P_Methodologie/guide-procedure) |
| [3] | How to build a WBS | [PMM4EP Guides](http://www.standardsnet.ep.parl.union.eu/standards/cms/Accueil/preconisations/P_Methodologie/guide-procedure) |

## Glossary

| **Abbreviation** | **Description** |
| --- | --- |
|  |  |
|  |  |

## Usage conventions

Where a chapter or section is not considered to be applicable, put "**NOT APPLICABLE**". Feel free to insert new sections (chapter, paragraph) as needed.

**Click on the Show/Hide  button in the toolbar to display/hide guidance.**

Guidance displayed.

# Other Annexes

You can change the title of the Annex and precise all information needed for the document.

## Contingency Plan (IT projects only)

**PMM4EP - Template** 'Contingency Plan'

If the template mentioned above is not used, please describe your process:

## Transition Plan

The Transition Plan describes how project deliverables will be brought to full operational status, integrated into on-going operations and maintained.

1. **R**: Responsible, **A**: Approval, **C**: Consulted, **I**: Informed [↑](#footnote-ref-1)
2. See [Risk Management](http://www.standardsnet.ep.parl.union.eu/standards/cms/Accueil/preconisations/P_Methodologie/guide-procedure) Guide. [↑](#footnote-ref-2)
3. **R**: Responsible, **A**: Approval, **C**: Contribution, **I**: Informed [↑](#footnote-ref-3)
4. The role of the **DPO** is to ensure that the institutions and bodies comply with their obligations with regard to protection of personal data. If relevant, contact: [**data-protection@europarl.europa.eu**](mailto:data-protection@europarl.europa.eu) [↑](#footnote-ref-4)
5. Naming convention: Procedure 'Program & Project naming convention' ([Standards.net](http://www.standardsnet.ep.parl.union.eu/standards/cms/Accueil/preconisations/P_Methodologie)) [↑](#footnote-ref-5)
6. Status: Draft, Final, Approved [↑](#footnote-ref-6)
7. Description: Note, summary, link, etc. [↑](#footnote-ref-7)