Project Management Life Cycle (PMLC)

Section 2
Outline
Project Management Life Cycle

→ PMLC Review

→ Phases In Depth
  ▪ Planning
  ▪ Analysis, Design & Development
  ▪ Testing & Readiness
  ▪ Post Go Live
  ▪ Closing

→ Wrap Up
Process Comparison

Project Management Life Cycle

Initiating → Planning → Executing → Closing

Idea → Proposal → Planning → Analysis, Design & Development → Testing & Readiness → Post Go Live → Closing

Request → Chartered Project

Monitoring & Controlling
Planning

Project Management Life Cycle

- Develop schedule, plans and requirements for implementation
- Acquire resources and engage the project team
Monitoring & Controlling

Project Management Life Cycle

- Schedule / Resource Management
- Change Management
- Risk Management
- Stakeholder Management
Executing
Project Management Life Cycle

- Transform business requirements into actionable items
- Design and develop the planned solution

- Validate the solution against the business requirements
- Verify deployment readiness

- Verify solution deployment per plan
- Prepare to transition project to operational organization
Closing

Project Management Life Cycle

- Receive approval to close the project
- Transition project items to the operational owner
- Perform Lessons Learned
Planning Phase - Process

Project Management Life Cycle

Input

Activities

- Baseline Business Requirements
- Acquire Project Team
- Create Project Definition Document
- Develop WBS - Schedule
- Develop Communications Plan
- Obtain Signed Contract(s)

Gate Review

Authorize to begin Development?

Yes

Close or delay the project, Complete open planning items

No

Plan Gate

Project Manager

Receives Charter
Planning Phase - Activities

Project Management Life Cycle

- Document the “what” of the idea at an actionable level
- If not baselined by Proposal Gate, must be by Planning Gate Review.

Activities

- Baseline Business Requirements
- Acquire Project Team
- Create Project Definition Document
- Develop WBS - Schedule
- Develop Communications Plan
- Obtain Signed Contract(s)
Planning Phase - Activities

Project Management Life Cycle

- Contact managers of resources committed by charter
- Establish expectations of resource usage
- Conduct a kickoff meeting
  - Present the project, including timelines
  - Introduce members, roles & expectations
  - Establish meeting frequency
  - Begin communications planning
  - Receive feedback on project

Activities

- Baseline Business Requirements
- Acquire Project Team
- Create Project Definition Document
- Develop WBS - Schedule
- Develop Communications Plan
- Obtain Signed Contract(s)

Idea → Proposal → Planning → Analysis, Design & Development → Testing & Readiness → Post Go Live → Closing
Planning Phase - Activities

Project Management Life Cycle

**Activities**
- Baseline Business Requirements
- Acquire Project Team
- Create Project Definition Document
- Develop WBS - Schedule
- Develop Communications Plan
- Obtain Signed Contract(s)

**Scope Management**
**Time Management**
**Cost Management**
**Quality Management**
**HR Management**
**Communications Mgt**
**Risk Management**
**Procurement Mgt**
**Project Integration**
Planning Phase - Activities

Project Management Life Cycle

Activities

- Baseline Business Requirements
- Acquire Project Team
- Create Project Definition Document
- Develop WBS - Schedule
- Develop Communications Plan
- Obtain Signed Contract(s)

Table of Contents

Revision History ................................................................. 3
Project Executive Summary .............................................. 4
1 Introduction ........................................................................ 5
  1.1 Scope ............................................................................ 5
  1.2 Objectives / Benefits .................................................. 5
  1.3 Exclusions ..................................................................... 5
2 Project Approach .............................................................. 5
  2.1 Define ............................................................................ 5
  2.2 Plan .............................................................................. 5
  2.3 Execute .......................................................................... 5
    2.3.1 Analyze, Design & Development ............................. 5
    2.3.2 Testing .................................................................. 6
    2.3.3 Deployment .......................................................... 6
  2.4 Monitor & Control .......................................................... 6
    2.4.1 Documentation Management .................................. 6
    2.4.2 Change Management ............................................. 6
    2.4.3 Communication Management ............................... 7
  2.5 Governance .................................................................... 7
  2.6 Gate Review Process ..................................................... 7
3 Project Milestones ............................................................. 7
  3.1 High-Level Project Timeline (pre-detailed schedule development) .... 7
  3.2 High-Level Project Milestones ....................................... 7
4 Assumptions, Dependencies, Constraints ................................ 8
  4.1 Assumptions ............................................................... 8
  4.2 Dependencies .............................................................. 8
  4.3 Constraints ................................................................. 8
5 Roles & Responsibilities ..................................................... 8
  5.1 Project Organization Chart .......................................... 8
  5.2 Project Team & Role Description .................................. 9
  5.3 Participating Departments/Third Parties ....................... 9
6 Approval .......................................................................... 10
## RASI Matrix
### Project Management Life Cycle

<table>
<thead>
<tr>
<th>Document Name</th>
<th>Phase Created</th>
<th>Project Owner</th>
<th>Process Initiator</th>
<th>Project Manager</th>
<th>Functional Resources</th>
<th>Technical Resources</th>
<th>Project Exec Sponsor</th>
<th>Project Stakeholder (Mg Dir or Higher)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Request Form / Request Summary</td>
<td>Idea</td>
<td>I</td>
<td>R</td>
<td>S</td>
<td></td>
<td></td>
<td>I</td>
<td></td>
</tr>
<tr>
<td>Proposal</td>
<td>Proposal</td>
<td>A</td>
<td>R</td>
<td>S</td>
<td>S</td>
<td>A</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td>Project Charter</td>
<td>Planning</td>
<td>A</td>
<td>R</td>
<td>A</td>
<td></td>
<td></td>
<td>A</td>
<td></td>
</tr>
<tr>
<td>Contract (If Required)</td>
<td>Planning</td>
<td>A</td>
<td>R</td>
<td>I</td>
<td>S</td>
<td>S</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td>Business Requirements</td>
<td>Planning</td>
<td>I</td>
<td>R</td>
<td>S</td>
<td>S</td>
<td>I</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td>Project Definition Document</td>
<td>Planning</td>
<td>I</td>
<td>R</td>
<td>A(^4)</td>
<td>A(^4)</td>
<td>I</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Schedule</td>
<td>Planning</td>
<td>I</td>
<td>R</td>
<td>S</td>
<td>S</td>
<td>I</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ASP System Security Plan</td>
<td>Planning</td>
<td>I</td>
<td>I</td>
<td>R</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Status Report</td>
<td>Planning</td>
<td>I</td>
<td>R</td>
<td>S</td>
<td>S</td>
<td>I</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Risks, Issues &amp; Actions Log</td>
<td>Planning</td>
<td>I</td>
<td>R</td>
<td>S</td>
<td>S</td>
<td>I</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meeting Minutes</td>
<td>Planning</td>
<td>I</td>
<td>R</td>
<td>I</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change Request Log</td>
<td>Planning</td>
<td>I</td>
<td>R</td>
<td>I</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communications Plan</td>
<td>Planning</td>
<td>I</td>
<td>R</td>
<td>I</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Functional Design Spec</td>
<td>Analysis, Design &amp; Development</td>
<td>I</td>
<td>S</td>
<td>R</td>
<td></td>
<td></td>
<td></td>
<td>I</td>
</tr>
<tr>
<td>Requirements Traceability Matrix</td>
<td>Analysis, Design &amp; Development</td>
<td>I</td>
<td>S</td>
<td>R</td>
<td></td>
<td></td>
<td></td>
<td>I</td>
</tr>
<tr>
<td>Test Plan</td>
<td>Analysis, Design &amp; Development</td>
<td>A</td>
<td>R</td>
<td>S(^3)</td>
<td>S(^3)</td>
<td>I</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td>Detailed Design Document / Technical Specifications</td>
<td>Analysis, Design &amp; Development</td>
<td>I</td>
<td>S</td>
<td>R</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service Level Agreement (SLA)</td>
<td>Analysis, Design &amp; Development</td>
<td>A</td>
<td>R</td>
<td>S</td>
<td>S</td>
<td>I</td>
<td>A</td>
<td></td>
</tr>
<tr>
<td>Deployment Plan</td>
<td>Analysis, Design &amp; Development</td>
<td>A</td>
<td>R</td>
<td>S</td>
<td>S</td>
<td>I</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td>Test Result Analysis &amp; Approval (UAT)</td>
<td>Testing &amp; Readiness</td>
<td>A</td>
<td>R</td>
<td>I</td>
<td></td>
<td></td>
<td></td>
<td>I</td>
</tr>
<tr>
<td>User &amp; Administrator Training &amp; Support Documentation</td>
<td>Post Go Live</td>
<td>I</td>
<td>R</td>
<td>I(^2)</td>
<td>R(^3)</td>
<td>R(^3)</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td>Project Transition Document (includes approval)</td>
<td>Post Go Live</td>
<td>A</td>
<td>R</td>
<td>R</td>
<td></td>
<td></td>
<td>A</td>
<td>I</td>
</tr>
<tr>
<td>Project Lessons Learned</td>
<td>Closing</td>
<td>I</td>
<td>R</td>
<td>I</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Financial Report/Budget</td>
<td>Closing</td>
<td>I</td>
<td>R</td>
<td>S</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GRB Summary</td>
<td>All</td>
<td>I</td>
<td>R</td>
<td>I</td>
<td></td>
<td></td>
<td></td>
<td>I</td>
</tr>
</tbody>
</table>

* For EVP\&T Contracts, the Executive Vice President & Treasurer is often the final signatory.
* The Project Manager can coordinate completion of these artifacts. However, responsibility rests in the functional and/or technical resources.
* Responsibility for these documents will be determined by the nature of the project and should be agreed upon prior to entry into the phase in which they are required.
* The appropriate managers for the functional and technical resources committed to the project serve as the approval authority for the PDD.

R = Responsible - The assigned owner of the artifact who is responsible for its creation.
A = Approval - Person responsible for approving the artifact once complete.
S = Support - Persons directly involved in the completion of the artifact. These people do much of the work required to complete the artifact.
I = Informed - Persons who ‘need to know’ regarding the progress and completion of the artifact.
Planning Phase - Activities

Project Management Life Cycle

Work Breakdown Structure (WBS)

“Software Implementation Project”

Activities

- Baseline Business Requirements
- Acquire Project Team
- Create Project Definition Document
- Develop WBS - Schedule
- Develop Communications Plan
- Obtain Signed Contract(s)

- Stakeholder Communications WBS1
  - Postcards / Mailings WBS 1.2
  - Initial announcement email WBS 1.3.1
- Email WBS1.3
  - First reminder email WBS1.3.2
- Meetings / Seminars WBS 1.4
  - Last reminder email WBS 1.3.3
- Website Development WBS2
  - Graphics Design WBS2.1
Activities

- Baseline Business Requirements
- Acquire Project Team
- Create Project Definition Document
- Develop WBS - Schedule
- Develop Communications Plan
- Obtain Signed Contract(s)
Communications Planning

Project Management Life Cycle

The written strategy for getting the right information to the right project stakeholders at the right time.

OR

Who needs to know what, when and how at what level of detail and informed by whom.

Activities

- Baseline Business Requirements
- Acquire Project Team
- Create Project Definition Document
- Develop WBS - Schedule
- Develop Communications Plan
- Obtain Signed Contract(s)
Communications Planning

Project Management Life Cycle

- Develop plan to actively communicate with stakeholders
  - “Internal” to the project
    - Project team meetings
    - Project team status reports & meeting minutes
    - Action Item registers
  - “External” to the project
    - Letters to stakeholders
    - Blast emails & news
    - Formal and informal stakeholder meetings
Communications Planning

Project Management Life Cycle

- Vertical & Horizontal
- Top-down & Bottom-up
- Targeted & Tailored
- Written & Oral
- Concise
- Timely With Reminders
- Proper Perspective & Tone
# Communications Planning

## Project Management Life Cycle

- Matrix to organize and track progress
  - Deliverable/Communication
  - Description
  - Audience
  - Delivery Method
  - Delivery Date/Timing/Deadline
  - Frequency
  - Approval/Reviewer
  - Responsible Party/Owner

---

<table>
<thead>
<tr>
<th>Idea</th>
<th>Proposal</th>
<th>Planning</th>
<th>Analysis, Design &amp; Development</th>
<th>Testing &amp; Readiness</th>
<th>Post Go Live</th>
<th>Closing</th>
</tr>
</thead>
</table>
### Activities

- Baseline Business Requirements
- Acquire Project Team
- Create Project Definition Document
- Develop WBS - Schedule
- Develop Communications Plan
- Obtain Signed Contract(s)

### Planning Phase - Activities

- Engage OGC in contracts approval process
- Monitor to ensure GW Executive signature
- Confirm all necessary parties have signed
Planning Phase – Gate Review

Project Management Life Cycle

If Planning Approved:
- Decision to proceed to the Analysis, Design & Development Phase
- Resources can begin the planned work
- Determination of artifacts required, participants required and/or action items for next phase
- Meeting minutes with decisions made
- Gate Review Approval Document

If Planning Rejected:
- If project cancelled, proceed to Closing Phase
- Address planning issues and re-review
- Meeting minutes with decisions made

Activities
- Baseline Business Requirements
- Acquire Project Team
- Create Project Definition Document
- Develop WBS - Schedule
- Develop Communications Plan
- Obtain Signed Contract(s)
Project Monitoring & Controlling

Project Management Life Cycle

Schedule / Resource Management
- Monitoring activities & variation from dates
- Adding and updating action items
- Document Management

Change Management
- Documenting & facilitating change requests
- Guarding scope through disciplined change management

Stakeholder Management
- Status Reporting
- Communications

Risk Management
- Risk register
- Status reporting

Triple Constraints
- Schedule
- Quality
- Cost

Monitoring & Controlling
Change Management FAQs
Project Management Life Cycle

What change requests will go through process?
- **Schedule** - Anything impacting committed deliverable dates.
- **Costs** - Anything increasing resources required.
- **Scope/Quality** - Any requested change in the requirements.

Who approves changes?
- The project owner can approve a change, if impact not significant.
- The Change Review Board has ultimate authority.
- In PMLC, the Gate Reviewers could be the Change Reviewers.

Where is this documented?
- The plan, including the Change Reviewers, can be documented in PDD or separate Change Management Plan.
- Change requests should be documented in a running log.
Analysis, Design & Development Phase - Process
Project Management Life Cycle

Input

![Project Definition Document]

**Activities**
- Create Test Plan & Procedures
- Create Deployment Plan
- Complete System and / or Process Development
- Complete Requirements Traceability Matrix
- Develop Service Level Agreement
- Update Project Schedule

Gate Review

Authorize to begin Testing?

- Yes
- No

Close or delay the project, Complete open development items

Project Manager

![Project Timeline Diagram]
Analysis, Design & Development Phase - Activities
Project Management Life Cycle

- **Test Plan** - Describes methodology and coordination of testing
- **Test Procedures** - Describe the test scenarios and test cases to be executed as part of testing

<table>
<thead>
<tr>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Create Test Plan &amp; Procedures</td>
</tr>
<tr>
<td>✓ Create Deployment Plan</td>
</tr>
<tr>
<td>✓ Complete System and / or Process Development</td>
</tr>
<tr>
<td>✓ Complete Requirements Traceability Matrix</td>
</tr>
<tr>
<td>✓ Develop Service Level Agreement</td>
</tr>
<tr>
<td>✓ Update Project Schedule</td>
</tr>
</tbody>
</table>
Analysis, Design & Development Phase - Activities
Project Management Life Cycle

Test Plan

- System / Process Testing Methodology
  - Test the integration of the development
  - Ensure development against Functional Specifications

- User Acceptance Testing Methodology
  - Engages the users in testing the solution
  - Ensure development against Business Requirements

- Regression Testing Methodology
  - Re-tests the solution after fixing
  - Ensure nothing else was broken through fixing
## Test Procedures / Cases

<table>
<thead>
<tr>
<th>STEP</th>
<th>OPERATOR ACTION</th>
<th>EXPECTED RESULTS</th>
<th>OBSERVED RESULTS*</th>
<th>A</th>
<th>CA</th>
<th>R</th>
<th>Priority (1, 2, 3)</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Log into the test Bill+Payment system using the login information for an Administrator User</td>
<td>Login is successful.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Click the “System Settings” link in the Administration Menu, then select the “Announcement” link</td>
<td>The “Announcement/Welcome Message” page is displayed</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>In the Announcement, update the date for housing deposits to include the year, then click the “Save” button</td>
<td>The change is saved</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>Click the “Preview” button</td>
<td>The “Preview” of the announcement is updated to reflect the change in the announcement</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>Log into the Student Account Suite and review the announcement</td>
<td>The “Announcement” text in the Student Account Suite is displayed correctly. All links are correct.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**OVERALL RESULTS (THIS CONCLUDES THIS TEST CASE)**

**SUMMARIZED OBSERVATIONS**

1. Sort order of the output: (correct/incorrect)
2. Performance: (Faster/Same/Slow)
3. Results of Output: (Reasonable/Unreasonable)

(Other testing results should be noted in the “Comments” section or attached to the test case.)
Overall plan to deliver solution

- Cutover plan
- Back out plan
- Site preparation
- Transition support
- Training
Analysis, Design & Development Phase - Activities
Project Management Life Cycle

Activities
- Create Test Plan & Procedures
- Create Deployment Plan
- Complete System and / or Process Development
- Complete Requirements Traceability Matrix
- Develop Service Level Agreement
- Update Project Schedule

Table of Contents

Revision History ................................................................. 3
1 Project Summary .............................................................. 4
2 Deployment Strategy ....................................................... 4
  2.1 Objectives ............................................................... 4
  2.2 Milestones & Schedule ............................................... 4
  2.3 Roles .................................................................. 4
  2.4 Software / Hardware Cutover Plan ................................. 4
  2.5 Support .................................................................. 4
3 Training .................................................................. 4
  3.1 Training Objectives ................................................... 4
  3.2 Training Participants .................................................. 4
  3.3 Training Materials ..................................................... 4
  3.4 Resources Required .................................................... 4
  3.5 High-Level Schedule .................................................. 4
4 Approval .................................................................. 5
5 Appendix A – Related Documents .................................... 6
6 Appendix B – Glossary ..................................................... 7
### Analysis, Design & Development Phase - Activities

**Project Management Life Cycle**

<table>
<thead>
<tr>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Create Test Plan &amp; Procedures</td>
</tr>
<tr>
<td>✓ Create Deployment Plan</td>
</tr>
<tr>
<td>✓ <strong>Complete System and / or Process Development</strong></td>
</tr>
<tr>
<td>✓ Complete Requirements Traceability Matrix</td>
</tr>
<tr>
<td>✓ Develop Service Level Agreement</td>
</tr>
<tr>
<td>✓ Update Project Schedule</td>
</tr>
</tbody>
</table>

![Project Management Life Cycle Diagram](image-url)
Analysis, Design & Development Phase - Activities

Project Management Life Cycle

Business Requirements ➔ Functional Specification ➔ Test Cases

Activities

- Create Test Plan & Procedures
- Create Deployment Plan
- Complete System and / or Process Development
- Complete Requirements Traceability Matrix
- Develop Service Level Agreement
- Update Project Schedule

BR3.1 – Adjustable slots capable of toasting both bread and bagels

TO

FS98.1.2 – Toaster slots expand between 1” and 2”

FS98.2.5 – Tension mechanism will hold toaster slots together in order to secure contents during toasting

TO

TC131.9 - Placing toast & bagel into toaster slots. Verify slot size & tension
### Analysis, Design & Development Phase - Activities

**Project Management Life Cycle**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>NetAnalyst Agents shall support establishing TCP/IP connections to probes on request outside of a testing session</td>
<td>ACH-4.1.01</td>
<td>FRS-18.1.1</td>
<td>7.1.1</td>
<td>ECoE Healthcheck &amp; Monitoring Requirements ver 1.0</td>
</tr>
<tr>
<td>NetAnalyst Agents shall support establishing TCP/IP connections to probes on request outside of a testing session</td>
<td>ACH-4.1.01</td>
<td>FRS-18.1.1</td>
<td>7.1.2</td>
<td>ECoE Healthcheck &amp; Monitoring Requirements ver 1.0</td>
</tr>
<tr>
<td>NetAnalyst Agents shall support establishing TCP/IP connections to probes on request outside of a testing session</td>
<td>ACH-4.1.01</td>
<td>FRS-18.1.1</td>
<td>7.1.3</td>
<td>ECoE Healthcheck &amp; Monitoring Requirements ver 1.0</td>
</tr>
<tr>
<td>NetAnalyst Agents shall support establishing TCP/IP connections to probes on request outside of a testing session</td>
<td>ACH-4.1.01</td>
<td>FRS-18.1.1</td>
<td>7.1.4</td>
<td>ECoE Healthcheck &amp; Monitoring Requirements ver 1.0</td>
</tr>
<tr>
<td>NetAnalyst Agents shall support establishing TCP/IP connections to probes on request outside of a testing session</td>
<td>ACH-4.1.01</td>
<td>FRS-18.1.1</td>
<td>7.1.5</td>
<td>ECoE Healthcheck &amp; Monitoring Requirements ver 1.0</td>
</tr>
<tr>
<td>NetAnalyst Agents shall support issuing healthcheck command(s) to probes on request outside of a testing session</td>
<td>ACH-4.1.02</td>
<td></td>
<td></td>
<td>ECoE Healthcheck &amp; Monitoring Requirements ver 1.0</td>
</tr>
<tr>
<td>NetAnalyst Agents shall support issuing healthcheck command(s) to probes on request outside of a testing session</td>
<td></td>
<td></td>
<td></td>
<td>ECoE Healthcheck &amp; Monitoring Requirements ver 1.0</td>
</tr>
<tr>
<td>NetAnalyst Agents shall support issuing healthcheck command(s) to probes on request outside of a testing session</td>
<td></td>
<td></td>
<td></td>
<td>ECoE Healthcheck &amp; Monitoring Requirements ver 1.0</td>
</tr>
<tr>
<td>NetAnalyst Agents shall support issuing healthcheck command(s) to probes on request outside of a testing session</td>
<td></td>
<td></td>
<td></td>
<td>ECoE Healthcheck &amp; Monitoring Requirements ver 1.0</td>
</tr>
</tbody>
</table>

1 Business Requirement Becomes 2 Functional Requirements Becomes 5 Test Cases
Analysis, Design & Development Phase - Activities

Project Management Life Cycle

Activities

✓ Create Test Plan & Procedures
✓ Create Deployment Plan
✓ Complete System and / or Process Development
✓ Complete Requirements Traceability Matrix
✓ Develop Service Level Agreement
✓ Update Project Schedule

Describes agreements between “customer” and “provider”

- General support agreement
- Hardware support agreements
- Hardware performance agreement
- Disaster recovery agreement
Analysis, Design & Development Phase – Gate Review
Project Management Life Cycle

**If Development Approved:**
- ✓ Decision to proceed to the Testing & Readiness Phase
- ✓ Determination of artifacts required, participants required and/or action items for next phase
- ✓ Meeting minutes with decisions made
- ✓ Gate Review Approval Document

**If Development Rejected:**
- ☞ If project cancelled, proceed to Closing Phase
- ☞ Address development issues and re-review
- ☞ Meeting minutes with decisions made

**Activities**
- ✓ Create Test Plan & Procedures
- ✓ Create Deployment Plan
- ✓ Complete System and/or Process Development
- ✓ Complete Requirements Traceability Matrix
- ✓ Develop Service Level Agreement
- ✓ Update Project Schedule
PMLC "Lite"
Project Management Life Cycle

Can be iterative development & test

~With Executive Sponsor Approval~
Testing & Readiness Phase - Process
Project Management Life Cycle

**Input**

- Execute Test Plan & Procedures
- Compile Test Results
- Track Issues to Resolution
- Begin Execution of Deployment Plan
- Update Project Schedule

**Activities**

**Gate Review**

- **GO LIVE?**
  - Yes
  - No

- Close or delay the project, Complete open issues

Flowchart:

1. **Input**
2. **Activities**
3. **Gate Review**
4. **GO LIVE?**
5. **Yes**
6. **No**
7. Close or delay the project, Complete open issues

Project Manager

**Phase Flow**:

- Idea
- Proposal
- Planning
- Analysis, Design & Development
- Testing & Readiness
- Post Go Live
- Closing
Testing & Readiness Phase - Process
Project Management Life Cycle

- Ensuring System Ready for Test
- UAT Coordination
- Facilitation / Monitoring of Testing Efforts
- Gathering of Testing Results

Activities
- Execute Test Plan & Procedures
- Compile Test Results
- Track Issues to Resolution
- Begin Execution of Deployment Plan
- Update Project Schedule
Testing & Readiness Phase - Process

Project Management Life Cycle

Activities

- Execute Test Plan & Procedures
- Compile Test Results
- Track Issues to Resolution
- Begin Execution of Deployment Plan
- Update Project Schedule

<table>
<thead>
<tr>
<th>Tests Procedure</th>
<th>Test Case</th>
<th>0</th>
<th>Critical</th>
<th>High</th>
<th>Low</th>
<th>Med</th>
<th>Fail Total</th>
<th>Pass Total</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1A</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1B</td>
<td>12</td>
<td></td>
<td></td>
<td>1</td>
<td>5</td>
<td>4</td>
<td>10</td>
<td>67</td>
<td>13%</td>
</tr>
<tr>
<td></td>
<td>11</td>
<td></td>
<td></td>
<td>1</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>10</td>
<td></td>
<td></td>
<td>1</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>13</td>
<td></td>
<td></td>
<td>1</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1</td>
<td></td>
<td></td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>32</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>24</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>36</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>7</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>22</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>9</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>30</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>29</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td>1</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>14</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>31</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>16</td>
<td></td>
<td></td>
<td>2</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>33</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>16</td>
<td></td>
<td></td>
<td>1</td>
<td>1</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>35</td>
<td></td>
<td></td>
<td>1</td>
<td>1</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>17</td>
<td></td>
<td></td>
<td>1</td>
<td>1</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>37</td>
<td></td>
<td></td>
<td>1</td>
<td>1</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>18</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>39</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>19</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td>1</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>20</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1B Total</td>
<td>540</td>
<td>0</td>
<td>0</td>
<td>4</td>
<td>11</td>
<td>0</td>
<td>15</td>
<td>118</td>
<td>11%</td>
</tr>
</tbody>
</table>
Testing & Readiness Phase - Process

Project Management Life Cycle

Activities
- Execute Test Plan & Procedures
- Compile Test Results
- Track Issues to Resolution
- Begin Execution of Deployment Plan
- Update Project Schedule

Distribution of Failures
- High: 315
- Low: 2506
- Med: 15

Issue Tracking Analysis
- Data Configuration: 50
- Site Functionality: 54
- Site Cosmetics & Text: 211

Total Pass / Fail Distribution
- Pass: 2506
- Fail: 315
## Testing & Readiness Phase - Process
### Project Management Life Cycle

#### GWU Mercer Testing Issues Tracking

<table>
<thead>
<tr>
<th>Issue</th>
<th>Priority</th>
<th>Group</th>
<th>Description</th>
<th>Originator</th>
<th>Assigned To</th>
<th>Test Case</th>
<th>Open Date</th>
<th>Est Resolution Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>155</td>
<td>Low</td>
<td>Site</td>
<td>during enrollment, is it possible to use the &quot;Progress...&quot; menu on the right hand side to skip to the next section? It is frustrating to not be able to go back until the entire first pass is complete.</td>
<td>Darcy Czajka</td>
<td>Rebecca Bednarz</td>
<td>Gen</td>
<td>9/25/09</td>
<td>1/1/10</td>
<td>Closed</td>
</tr>
<tr>
<td>339</td>
<td>Med</td>
<td>Functional</td>
<td>[Change in dependent or beneficiary information] - Was able to change beneficiaries but unable to confirm, indicated action required in the FSA sections on the pre confirm page</td>
<td>Janet Monaco</td>
<td>Janet Monaco</td>
<td>UAT3</td>
<td>10/21/09</td>
<td>11/16/09</td>
<td>Closed</td>
</tr>
<tr>
<td>342</td>
<td>Med</td>
<td>Functional</td>
<td>[Supp EE Life / Marriage / Add] - they can't add unless they already had atleast 10k which they didn't</td>
<td>Sara Peake</td>
<td>Sara Peake</td>
<td>UAT3</td>
<td>10/21/09</td>
<td>11/16/09</td>
<td>Closed</td>
</tr>
<tr>
<td>346</td>
<td>Med</td>
<td>Functional</td>
<td>[Supp EE Life / Loss or Gain of Cov / Add] - they can't add unless they already had atleast 10k which they didn't</td>
<td>Sara Peake</td>
<td>Sara Peake</td>
<td>UAT3</td>
<td>10/21/09</td>
<td>11/16/09</td>
<td>Closed</td>
</tr>
<tr>
<td>347</td>
<td>Med</td>
<td>Functional</td>
<td>[Supp Spouse Life / Loss or Gain of Cov / Add] - since EE didn't have it before they should not be able to add</td>
<td>Sara Peake</td>
<td>Sara Peake</td>
<td>UAT3</td>
<td>10/21/09</td>
<td>11/16/09</td>
<td>Closed</td>
</tr>
<tr>
<td>348</td>
<td>Med</td>
<td>Functional</td>
<td>[Supp EE Life / Loss or Gain of Cov / Add] - they can't add unless they already had atleast 10k which they didn't</td>
<td>Sara Peake</td>
<td>Sara Peake</td>
<td>UAT3</td>
<td>10/21/09</td>
<td>11/16/09</td>
<td>Closed</td>
</tr>
<tr>
<td>349</td>
<td>Med</td>
<td>Functional</td>
<td>[Supp Spouse Life / Loss or Gain of Cov / Add] - since EE didn't have it before they should not be able to add</td>
<td>Sara Peake</td>
<td>Sara Peake</td>
<td>UAT3</td>
<td>10/21/09</td>
<td>11/16/09</td>
<td>Closed</td>
</tr>
<tr>
<td>350</td>
<td>Med</td>
<td>Functional</td>
<td>[Supp EE Life / Loss or Gain of Cov / Add] - they can't add unless they already had atleast 10k which they didn't</td>
<td>Sara Peake</td>
<td>Sara Peake</td>
<td>UAT3</td>
<td>10/21/09</td>
<td>11/16/09</td>
<td>Open</td>
</tr>
</tbody>
</table>
Have essential support and user personnel been trained?

Is site / hardware / software ready for Go Live?

Have we communicated the pending changes to stakeholders?

Do we have a cutover and back out plan?
Testing & Readiness Phase - Process
Project Management Life Cycle

Activities
- Execute Test Plan & Procedures
- Compile Test Results
- Track Issues to Resolution
- Begin Execution of Deployment Plan
- Update Project Schedule

Table of Contents
Revision History ............................................................... 3
1 Project Summary ......................................................... 4
2 Deployment Strategy ................................................ 4
  2.1 Objectives ...................................................... 4
  2.2 Milestones & Schedule ......................................... 4
  2.3 Roles .......................................................... 4
  2.4 Software / Hardware Cutover Plan .......................... 4
  2.5 Support ......................................................... 4
3 Training ................................................................. 4
  3.1 Training Objectives ........................................... 4
  3.2 Training Participants ......................................... 4
  3.3 Training Materials ............................................. 4
  3.4 Resources Required .......................................... 4
  3.5 High-Level Schedule ......................................... 4
4 Approval ............................................................. 5
5 Appendix A – Related Documents ............................... 6
6 Appendix B – Glossary ............................................... 7
Testing & Readiness Phase – Gate Review
Project Management Life Cycle

If Testing & Readiness Approved:

- Decision to GO LIVE with solution.
- Determination of artifacts required, participants required and/or action items for next phase
- Meeting minutes with decisions made
- Gate Review Approval Document

Activities

- Execute Test Plan & Procedures
- Compile Test Results
- Track Issues to Resolution
- Begin Execution of Deployment Plan
- Update Project Schedule

If Testing & Readiness Rejected:

- If project cancelled, proceed to Closing Phase
- Address open issues and re-review
- Meeting minutes with decisions made

Idea → Proposal → Planning → Analysis, Design & Development → Testing & Readiness → GO LIVE → Post Go Live → Closing
Post Go Live Phase - Process
Project Management Life Cycle

Input

The George Washington University
Project Deployment Plan

Activities
- Monitor Post Go Live Activity
- Complete Deployment Actions
- Prepare Transition Plan

Gate Review

Move to Close Project?

Yes
No

Resolve open Issues

Project Manager

Activities Flowchart

Idea → Proposal → Planning → Analysis, Design & Development → Testing & Readiness → Post Go Live → Closing

Post Go Live Phase - Process
Project Management Life Cycle

Office of the Senior Associate Vice President for Finance
Post Go Live Phase - Process

Project Management Life Cycle

- Provide support after system / process changes deployed
- Document, track and monitor issues and resolutions
- Escalate as necessary

Activities
- Monitor Post Go Live Activity
- Complete Deployment Actions
- Prepare Transition Plan
Post Go Live Phase - Process

Project Management Life Cycle

- Complete user and administrator training
- Ensure all user and administrator documentation is complete and accessible
- Close any issues remaining from Go Live

<table>
<thead>
<tr>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔ Monitor Post Go Live Activity</td>
</tr>
<tr>
<td>✔ Complete Deployment Actions</td>
</tr>
<tr>
<td>✔ Prepare Transition Plan</td>
</tr>
</tbody>
</table>

- Post Go Live Phase - Process
  - Complete user and administrator training
  - Ensure all user and administrator documentation is complete and accessible
  - Close any issues remaining from Go Live
Post Go Live Phase - Process

Project Management Life Cycle

Activities

✓ Monitor Post Go Live Activity
✓ Complete Deployment Actions
✓ Prepare Transition Plan

Table of Contents

Revision History .......................................................... 2
1 Project Acceptance .................................................. 3
2 Operational Organization Description ....................... 3
3 Service Level Agreement ........................................... 3
3.1 Primary Support Contact ....................................... 3
3.2 Performance Agreements ....................................... 3
3.3 Disaster Recovery Plan ........................................... 3
4 Actions & Issues Transfer ......................................... 3
5 Project Transition Schedule ....................................... 4
6 Approval ................................................................... 5
Appendix A – Related Documents ................................. 6
Appendix B – Glossary .................................................. 7
Post Go Live Phase – Gate Review
Project Management Life Cycle

If Decision to Move to Closing Approved:

☑ Project Transition Plan approved, project moves to closing phase
☑ Determination of artifacts required, participants required and/or action items for next phase
☑ Meeting minutes with decisions made

If Decision to Move to Closing Rejected:

⊗ Address deployment issues and re-review
⊗ Meeting minutes with decisions made

Activities
- Monitor Post Go Live Activity
- Complete Deployment Actions
- Prepare Transition Plan
PMLC “Lite”

Project Management Life Cycle

Move to closing after Go Live.

~With Executive Sponsor Approval~
Closing Phase - Process
Project Management Life Cycle

Input

The George Washington University
[Project Name]
Project Transition Document

Activities
- System/Process Support Handed to Operations
- Project Lessons Learned
- Project Financial Review
- Archive Project Artifacts

Gate Review

Close Project?

Resolve open Issues

Project Manager

Idea → Proposal → Planning → Analysis, Design & Development → Testing & Readiness → Post Go Live → Closing
Closing Phase - Process

Project Management Life Cycle

- Transition process / system support to operation group
- Hand off open project issues
- Notify stakeholders of the transition

**Activities**

- System/Process Support Handed to Operations
- Project Lessons Learned
- Project Financial Review
- Archive Project Artifacts
Closing Phase - Process
Project Management Life Cycle

Activities

- System/Process Support Handed to Operations
- Project Lessons Learned
- Project Financial Review
- Archive Project Artifacts

- Facilitate Project Team & Stakeholder Meeting
- Document lessons learned by project phase
Closing Phase - Process
Project Management Life Cycle

Activities
- System/Process Support Handed to Operations
- Project Lessons Learned
- Project Financial Review
- Archive Project Artifacts

- Compare initial project budget with actual expenditures
- Assess benefits achieved
Closing Phase - Process
Project Management Life Cycle

- Organize and file all project artifacts
- Communicate archiving location to stakeholders

Activities
- System/Process Support Handed to Operations
- Project Lessons Learned
- Project Financial Review
- Archive Project Artifacts

Open Enrollment 2011
- 01 Idea Phase
- 02 Proposal Phase
- 03 Planning Phase
- 04 Development Phase
- 05 Testing Phase
- 06 Implementation Phase
- 07 Closing Phase
- 08 Communications
- Open Enrollment 2011 Document Matrix
- Recycle Bin
Closing Phase - Process

Project Management Life Cycle

If Decision to Close Project Approved:
- Close the project
- Meeting minutes with decisions made

If Decision to Close Project Rejected:
- Address open issues and re-review
- Meeting minutes with decisions made
Project Closed
Project Management Life Cycle