Appendices

Appendices

This section provides Project Managers with a compilation of references and resources to use as they seek to further their education and skills in project management.

Appendix 1 is a **Glossary** of the project management terms used throughout the Guidebook.

Appendix 2 is a repository of all the **Templates** used throughout the ***Guidebook*** (but without the annotations, instructions, and field descriptions). This has been included to facilitate individual Project Managers' use of templates for their projects. These may be copied or downloaded from the PMO website for easy adaptation and use.

Appendix 3 includes **Suggested Reading** materials, websites and resources that may be of use to Project Managers.

1 GLOSSARY

Acceptance Management – A process to be used throughout the project to obtain approval from an authorized Customer Decision Maker for work done on the project to date. This process is defined and included in the Project Plan. The approval at each stage means that the deliverable(s) for that stage are completed to the satisfaction of the Customer. In order for a deliverable to be considered "complete" and "acceptable", it is measured against pre-determined acceptance criteria.

Accessibility – Access to information and data for Customers with disabilities comparable to that accorded Customers who do not have disabilities.

Activity – Is equivalent to a process and is a piece of work accomplished during a project. A process can be broken down into tasks.

Attribute – A data element that holds information about an object (entity).

Audit – *See* Project Audit.

Baseline – An initial measurement that can serve as the basis for future comparisons. Applies to the Project Schedule.

Benchmark – A standard against which measurements or comparisons can be made.

Best Practices – Certain procedures recognized during the course of the project by the Project Manager, Project Sponsor, or Project Team, that, when exercised, improved the production of a deliverable, streamlined a process, or ways to improve standardized templates, etc. These best practices must be documented and shared with other Project Managers so that they can be repeated.

Brainstorming – A technique used to stimulate creative thinking and overcome impasses to problems. Team members gather in a room and offer ideas for solutions to a problem(s). No idea is rejected no matter how absurd or impractical. Often a practical solution surfaces and a decision is reached by group consensus.

Business Rules – Practices associated with certain business processes that are required by regulation, law, accounting controls or business practices. Rules should be defined in as much detail as possible using techniques such as structured English.

Business Continuity Planning/Disaster Recovery (BCP/DR) – The process of developing advance arrangements and procedures that would enable an organization to respond to a disaster and resume its critical business functions within a predetermined period of time, minimize the amount of loss, and repair or replace the damaged facilities as soon as possible. Source: Disaster Recovery Institute International – Glossary of Industry Terms (www.drii.org).

Business Process Re-engineering (BPR) – A technique used to optimize organizational processes.

Capability Maturity Model (CMM) – A description of the stages through which software organizations evolve as they define, implement, measure, control, and improve their software processes. This model provides a guide for selecting process improvement strategies by facilitating the identification of current process capabilities and the issues most critical to software quality and process improvement.

Change Control – A plan for handling changes to a project aimed at minimizing the negative effect on a projects outcome. Change is defined as ANY adjustment to any aspect of the Project Plan or to any already approved deliverable(s).

Charter – *See* Project Charter.

Client-Server – A system architecture where a host computer or 'server' provides data and services to requesting or 'client' workstations.

Computer-Aided Software Engineering (CASE) – A tool that automates and improves aspects of the System Development Life Cycle (SDLC).

Configuration Management – A discipline applying technical and administrative direction to identify and document the functional and physical characteristics of a system component, control changes to those characteristics, record and report change processing and implementation status, and verify compliance with specified requirements.

Constraint – Something that establishes boundaries, restricts, limits or obstructs any aspect of the project.

CSSQ – The interdependent quadruple constraints of the project (scope, cost, schedule and quality), represented by project scope, project budget, project schedule, and quality management plan.

Consumer – *See* Roles and Responsibilities, Section 1 Introduction.

Cost/Benefit Analysis – A comparison of the cost of the project to the benefits it would realize, to determine whether the project or portion of the project should be undertaken.

Critical Success Factor (CSF) Interviewing – A process in which a series of strategic questions are asked to identify what objectives and goals need to be met in order for the project to demonstrate success.

CRUD Matrices – *See* Matrix Diagram. A tool used to cross reference the Process Model to the Logical Data Model and to identify which business functions map to which data elements. CRUD is defined as follows: C (for CREATE), R (for REPLACE), U (for UPDATE) and D (for DELETE).

Customer – *See* Roles and Responsibilities, Section 1 Introduction.

Customer Representatives – *See* Roles and Responsibilities, Section 1 Introduction.

Customer Decision-Makers – *See* Roles and Responsibilities, Section 1 Introduction.

Database – An integrated collection of data (entities and attributes) organized to avoid duplication of data and allow for easy retrieval.

Database Schema – A view of the physical database detailing the specifics of the tables, fields and their relationships, and identifying keys, indexes, and triggers.

Data Flow Diagram – A picture diagramming how data flows through a system. It depicts the external entities (which are sources or destinations of data), the processes which transform that data, and the places where the data is then stored.

Data Dictionary – Reference material that describes and defines each piece of data used in a system. This may include entity and attribute definitions, discuss relationship characteristics and provide sizing information.

Decision Trees – A branching chart showing the actions that occur from various combinations of conditions and decisions.

Defect – A flaw in a system or system component that causes the system or component to fail to perform its required function.

Defect Tracking – The process of ensuring that all test cases have been executed successfully. If cases have not executed successfully and defects have been identified, a log is generated to track the defects so that the Project Team can correct them and perform a retest.

Deliverable(s) – A product or service satisfying one or more objectives of the project.

Effort Estimate – An estimate of the amount of effort necessary to perform each project task.

Encryption – The coding of data either at its source or as part of a data stream to prevent unauthorized access to the data. For example, information transmitted over a telecommunications line is scrambled at one end, and unscrambled at the other.

Entity – A distinct object that is represented in the database containing source data or acting to collect data. An example would be a Customer table.

Entity Relationship Diagram (ERD) – A pictorial representation of the relationships between entities. This diagram can be helpful in communicating information needs with business users and can also provide information to technical specialists for design of physical databases, foreign keys, business views, and so forth.

External Stakeholder – *See* Roles and Responsibilities, Section 1 Introduction.

Flowchart – A graphical representation of the flow and interaction of a process or system.

Functional Decomposition – The process of dividing higher-level functions into sub-functions and processes.

Gap Analysis – *See* Matrix Diagram.

Graphical User Interface (GUI) – The front-end of an application through which the user interacts with the system by utilizing buttons, the mouse, drop down menus, etc. The GUI is the face of the application where the user will see data displayed.

Hosting – A service in which a provider or organization may house an application and support the software and hardware needs required to run that application. This may also include the housing and management of a networking and or telecommunications infrastructure.

Internal Stakeholders – *See* Roles and Responsibilities, Section 1 Introduction.

Issue Management and Escalation – A process for capturing, reporting, escalating, tracking, and resolving problems that occur as a project progresses.

Joint Application Design (JAD) – A process that brings the Project Team, Customers, and Stakeholders together to clarify, define, and gain consensus on business requirements. JAD sessions are formal meetings involving a detailed agenda, visual aids, and a facilitator who moderates the session and an analyst who records the specifications. By utilizing JAD, Customers become directly involved in the application design.

Local Area Network/Wide Area Network (LAN/WAN) – Local area networks provide a means to link multiple computers within a single location. LANs may be interconnected with one another or with wide area networks, using interface devices such as bridges, routers and gateways. WANs provide a link for widely separated locations.

Lessons Learned – Information resulting from feedback on the project, and based on the assessment of project performance, that may benefit the Project Manager as well as managers and team members of similar projects.

Matrix Diagram – A format used to clarify or highlight the relationship between two factors. For example, the matrix diagram may be used during gap analysis to validate that all business requirements identified during JAD sessions have been accommodated in the process and logical data model deliverables. The matrix displays requirements down the left side of the grid, while processes or data elements are tracked across the top of the grid. A checkbox at the intersection of a requirement and a process or data element would indicate that the requirement has been successfully accounted for in a deliverable.

Mission – The mission of the organization drives the development of the business case. When the business case is developed, it will explain how the expected outcome of the project supports the organization's mission.

Multi-Tier/Client-Server (MT/CS) – A client-server system architecture (*See* Client-Server), where a software application is decomposed into operational areas or layers (e.g., database, business objects, and presentation layers), which are then physically distributed across multiple computers.

Normalization – A process by which complex data relationships are simplified with the goal being to eliminate redundancies in the database design. This process simplifies data management and software development efforts while improving data consistency and optimizing system performance.

Outsourcing – The practice of contracting out a project, a portion of a business, or an IT operation.

Parallel Testing – The concurrent testing of both the current and new system with identical data to compare the outputs for consistency and accuracy.

Peer Code Reviews – A formal repeatable review technique that gathers peers to examine a deliverable or work product for defects so they can be corrected early in the development cycle.

Performing Organization – *See* Roles and Responsibilities, Section 1 Introduction.

Phase – A series of processes organized into a distinct stage of project development. The end of a project phase usually coincides with the approval of a major deliverable.

Post-Implementation Report – A summary of information gathered as a result of conducting the Post-Implementation review. The report documents the successes and failures of the project and provides a historical record of the planned and actual budget and schedule. It also contains recommendations for improvement to be used by other projects of similar size and scope.

Process – A series of tasks performed to bring about a result.

Process Flow Diagram – A diagram used to analyze the flow of a process, find problems, create solutions, and measure efficiency. Symbols are used in a visual representation that can quickly point out delays, unnecessary events, and other problem areas.

Project – A temporary endeavor undertaken to create a unique product or service.

Project Audit – A process designed to ensure that the Quality Assurance activities defined in Project Planning are being implemented and to determine whether quality standards are being met.

Project Lifecycle – A collection of phases whose number and names are determined by the control needs of the Performing Organization.

Project Management – Direction and coordination of human and material resources for a project using management techniques to achieve cost, scope, schedule, quality, and customer satisfaction objectives.

Project Manager – *See* Roles and Responsibilities, Section 1 Introduction.

Project Repository – A collection or archive of all information and documents from the project.

Project Sponsor – *See* Roles and Responsibilities, Section 1 Introduction.

Project Team – *See* Roles and Responsibilities, Section 1 Introduction.

Proof-of-Concept – A technique used to confirm the feasibility of one or more components of the technical solution. A Proof-of-concept approach helps to minimize cost by 'testing the waters' first on an idea or a design.

Prototyping – The process of building a small working version of a system design as a means of hedging risk, and attaining Customer buy-in. Prototyping can provide a better understanding of Customer requirements, validate those requirements, and sometimes perform as a proof-of-concept tool.

Pseudo Code – A tool for specifying program logic in English-like readable form, without conforming to the syntactical rules of any particular programming language.

Quality Assurance – Evaluation of project performance on a regular basis to ensure that the project will satisfy the established quality standards.

Quality Control – Monitoring of project results to ensure compliance with the appropriate established quality standards and to eliminate causes of non-compliance.

Quality Standards – Criteria established to ensure that each deliverable created meets a certain level of quality agreed to by the Customer and Project Manager.

Rapid Application Development (RAD) – A technique that allows users to participate in an iterative design and development process. Conceptually, the project 'loops' through the Design, Construction and Acceptance stages, followed by a re-Design, revised Construction, Acceptance, and so on.

Regression Testing – The process of testing new software components in an environment where other existing modules (or the entire application) are also tested to ensure that the new components do not negatively impact any existing software. Prior to a release to production, the Project Team will execute test cases that have previously been successfully executed to determine that the new piece of software works within the context of the system.

Release Management – A process used to manage the release of software into different test environments. It is typical for projects to identify a release engineer or department to monitor versions of software and their release into the next environment. For example, if modifications to existing code are made and tested in the QA environment, the process to move that code to acceptance would be executed according to the procedure outlined in the release management process.

Risk – An anticipated event with the potential to positively or negatively affect the project.

Risk Assessment – A process to identify which risks are likely to affect a project, documenting them, and determining which require a mitigation plan.

Skills Inventory – A record of the skills learned and used on the project by the Project Team.

Software Engineering Institute (SEI) – The Software Engineering Institute (SEI) is a federally funded research and development center sponsored by the U.S. Department of Defense through the Office of the Under Secretary of Defense for Acquisition, Technology, and Logistics [OUSD (AT&L)]. The SEI's core purpose is to help others make measured improvements in their software engineering capabilities. (*See* www.sei.cmu.edu.)

Software Quality Assurance – (1) A planned and systematic pattern of all actions necessary to provide adequate confidence that a software work product conforms to established technical requirements. (2) A set of activities designed to evaluate the process by which software work products are developed and/or maintained. (Derived from IEEE-STED-610.)

Stakeholders – *See* Roles and Responsibilities, Section 1 Introduction.

Storyboarding – A technique to use during a JAD session to aide in the brainstorming process. Ideas are written down on cards and posted immediately on a wall by the participants. Once all the ideas are posted, several passes of categorization take place. Some ideas may be dropped via group consensus; others may be enlarged or improved.

Strategic Plan – A formal document produced by the Performing Organization outlining organizational goals and direction over a designated period of time. The Strategic Plan drives the proposed solution developed during Project Origination.

Structured English – A precise form of English that uses the logical structures of structured coding to represent policies and procedures.

System Context Diagram – A graphical representation of how the system fits into the current environment. It shows all interfaces to and from the system and allows the Project Team to visualize how the new system will interact with other systems, outside entities and Consumers.

System Load Analysis – A process to ensure that the application or system developed will operate under peak usage conditions. For example, if transaction levels are consistent every day and every month except during peak holiday hours, system load analysis will help identify the performance requirements necessary to avoid failure for those instances. It is important to consider these requirements during the Requirements Analysis and Design phases of the SDLC.

Task – A single piece of work itemized in the Project Schedule to which effort and resources must be applied.

Test Cases – Individual test scenarios that may be executed singularly or in combination to test modules or strings of modules. Test cases should be developed by the Project Team to test what is expected, as well as what should not be expected.

Test Plan – A series of test cases that when compiled into a whole constitute a testing plan for the Project Team to follow. A well-formulated test plan should ensure that all internal components and system interfaces operate as they should according to the Functional and Technical Specifications.

Test Scripts – Pieces of code which when executed for a test case or a test plan are automatic. The advantage of developing test scripts are to help save time when testing components on a regular basis with large amounts of data, or if planning to execute a test plan on a recurring basis, such as with regression testing.

Total Quality Management (TQM) – Both a philosophy and a set of guiding principles that represent the foundation of a continuously improving organization. The application of quantitative methods and human resources to improve the materials and services supplied to an organization, all the processes within an organization, and the degree to which the needs of the Customer are met, now and in the future.

Unified Modeling Language (UML) – UML is a modeling language used to define a system prior to construction, much like a blueprint is used prior to building a house. It allows the Project Team to specify, visualize, and document an application, including its structure and design, in a way that meets all of the user business requirements. There are several tools on the market that utilize the UML methodology. For more information see www.uml.org.

Use Cases – A modeling technique within UML, used to define business requirements from the point of view of the user. Use cases help provide an understanding of the functionality of the system and interactions among objects and form the basis of both system construction and system testing. A use case is a sequence of actions that an actor (usually a person), but perhaps an external entity, (such as another system) performs within a system to achieve a particular goal.

Walkthroughs – A technique for performing a formal review which takes place at review and inspection points throughout the lifecycle being utilized, to observe and verify what has been accomplished.

Work Breakdown Structure (WBS) – A grouping of project elements or components which defines the total project scope. A WBS is deliverable-oriented and each descending level represents an increasingly detailed definition of a component.

Work Flow Diagram – A graphical representation of the organization's workflow. Which is helpful when documenting the current working model and when looking for opportunities to improve a process.

2 GUIDEBOOK TEMPLATES

New York State
Project Business Case

PROJECT IDENTIFICATION

Project Name: _____ Date: _____
Agency: _____
Business Unit/Program Area: _____
Project Sponsor: _____ Project Manager: _____

Business Need/Problem:

Solution (as described in Proposed Solution):

Consistency/Fit with Organization's Mission:

New York State
Project Business Case

Anticipated Benefits: (both qualitative and quantitative)

Original Cost Estimate: (from Proposed Solution)

Cost/Benefit Analysis:

Special Fund Sources:

New York State
Proposed Solution

PROJECT IDENTIFICATION

Project Name: _____ Date: _____

Business Unit/Program Area: _____

Project Sponsor: _____ Project Manager: _____

Summary of Business Need for the Project (from the Business Case):

Proposed Solutions / Project Approach:

Alternatives considered	Why chosen/not chosen

Project Objectives:

Consistency/Fit with Organizational Strategic Plan:

New York State
Proposed Solution

BUDGET/RESOURCES:

Estimated Costs:			
Type of Outlay	Initial (Development)	Annual (Recurring)	Remarks
Hardware			
Software			
Supplies			
User Training			
Consultant Services			
Other:			
TOTAL			
Estimated Resources/Personnel:			
Program Areas	hours	hours	
	hours	hours	
	hours	hours	
Information Services	hours	hours	
Consultant Services	hours	hours	
	hours	hours	

Risks:

Organizational Impact:

Additional Comments:

New York State
Proposal Decision Notice

PROJECT IDENTIFICATION

Project Name: _____ Date: _____

Agency: _____

Business Unit/Program Area: _____

Project Sponsor: _____ Project Manager: _____

Proposal Decision:

Decision	Indicator	Date
Project Proposal Approved		
Additional Information is Required for Decision		
Project Proposal Declined		

Project Selection Committee Signatures:

Project Selection Committee Member Name	Signature	Date

Project Proposal Approved:

Target Date for Project Initiation start:

Project Sponsor Assigned:

Project Manager Assigned:

New York State
Proposal Decision Notice

Additional Information Required for Decision:

Specific Additional Information Required:

Proposal re-submission date for the next Project Selection Cycle:

Other comments:

Project Proposal Declined:

Explanation of decision:

Screening results:

Evaluation results:

Prioritization/Selection results:

New York State
Project Charter

PROJECT IDENTIFICATION

Project Name: _____ Date:_____

Project Manager: _____ Project Sponsor: _____

New York State
Project Charter

PROJECT DESCRIPTION

Project Background:

Project Objective:

Critical Success Factors:

Required Resources:

Constraints:

Project Authority:

New York State
Project Charter

PROJECT CHARTER APPROVAL

Project Sponsor Name: _____

Action: Approve: ☐ Reject: ☐

Comments:

Project Sponsor Signature: _____

Date: _____

AGREEMENT TO SECURE REQUIRED RESOURCES

Approver Name: _____ Role: _____

Approver Comments:

Approver Signature: _____

Date: _____

Project Initiation Kick-off Meeting Agenda

Project: _____

Date:_____

Time: From: _____ To: _____

Location: _____

Invitees:

Attendees:

AGENDA

	Presenter Name	Time (minutes)
Introductions		
Sponsor's Statement		
Project Request & Background		
Project Goals & Objectives		
Project Scope		
Roles & Responsibilities		
Next Steps		
Questions		

ADDITIONAL INFORMATION

Handouts:

Project Initiation Kick-off Meeting

Project: _____

Date:_____

Time: From: _____ To: _____

Location: _____

DECISIONS

Decision Made	Impact	Action Required?

ISSUES

Issue Description	Impact	Action Required?

ACTION ITEMS FOR FOLLOW UP

Action	Responsible	Target Date

New York State
Project Scope Statement

PROJECT IDENTIFICATION

Project Name: _____ Date: _____

Project Sponsor: _____ Project Manager: _____

New York State
Project Scope Statement

A. BUSINESS NEED/PROBLEM:

B. PROJECT OBJECTIVES (FROM PROJECT CHARTER):

C. PROJECT RESULTS:

D. PROJECT CONTENT:

New York State
Project Schedule Worksheet

PROJECT IDENTIFICATION

Project Name: _____ Date: _____

Project Sponsor: _____ Project Manager: _____

New York State
Project Schedule Worksheet

PROJECT SCHEDULE INFORMATION

Phase	Process	Task	Estimated Hours	Dependent Upon	Role

New York State
Project Quality Management Plan

PROJECT IDENTIFICATION

Project Name: _____ Date: _____

Project Sponsor: _____ Project Manager: _____

New York State
Project Quality Management Plan

PART A. QUALITY PLANNING – IDENTIFIED QUALITY STANDARDS

New York State
Project Quality Management Plan

PART B: QUALITY ASSURANCE ACTIVITIES

New York State
Project Quality Management Plan

PART C: QUALITY CONTROL ACTIVITIES

New York State
Preliminary Budget Estimate

PROJECT IDENTIFICATION

Project Name: _____ Date: _____

Project Sponsor: _____ Project Manager: _____

New York State
Preliminary Budget Estimate

BUDGET INFORMATION

Phase	Process/Task	Labor Cost	Material Cost	Travel Cost	Other Cost	Total Cost	Planned Date of Expenditure
	TOTAL Budget						

COMMENTS: (List any assumptions pertaining to the costs entered above.)

Agency Name
Project Name

Project Status Report

As of (Date)

Distribution:

Original Copy
Project Repository

Project Team
(List names)

Stakeholders
(List names)

Prepared By:
(Project Manager name)

Project Status Report

STATUS SUMMARY:

SCHEDULE:

Project Phase	Project Process	Planned Start	Actual Start	Planned End	Actual End	Explanation of Variance

FINANCIAL INFORMATION:

A	B	C	D	E	F	G
Original Project Estimate	Total Approved Changes	Total Current Estimate	Amount Expended to Date	Estimated Amount to Complete	Forecast Total	Project Variance
Explanation of Variance:						

Project Status Report

ISSUES AND ACTION ITEMS:

Issue Identification					**Action Plan**			
Issue #	Date	Priority	Issue Name	Description	Action	Owner	Due Date	Status
1.								
2.								
3.								

Project Status Report

ACCOMPLISHMENTS THIS REPORTING PERIOD:

For Reporting Period of xx/xx/xxxx – xx/xx/xxxx

PLANNED ACTIVITIES FOR NEXT REPORTING PERIOD:

For Reporting Period of xx/xx/xxxx – xx/xx/xxxx

ACCEPTANCE AND CHANGE MANAGEMENT:

Deliverable Acceptance Log

Deliverable Name	Sent for Review (Date)	Sent for Approval (Date)	Action Approve/Reject	Action Date

Change Control Log

Change #	Log Date	Initiated By	Description	Action Accept/Reject	Action Date	Reject Description

Lost Time:

Project Status Report

Closed Issues:

Staffing

Team Member	Role	Information/Notes

New York State
Project Communications Plan

PROJECT IDENTIFICATION

Project Name: _____ Date: _____

Project Sponsor: _____ Project Manager: _____

New York State
Project Communications Plan

Stakeholder	Message/Information Need	Delivery Vehicle	Frequency
Project Sponsor			
Project Manager			
Project Team Member			
Quality Team Member			
Procurement Team Member			
Other Stakeholder			

New York State
Project Communications Plan

EXISTING SYSTEMS:

METHOD FOR UPDATING THE COMMUNICATIONS PLAN:

OTHER COMMUNICATIONS INFORMATION:

New York State
Project Plan

PROJECT IDENTIFICATION

Project Name: _____ Date: _____

Project Sponsor: _____ Project Manager: _____

REVISION HISTORY

Revision #	Revision Date	Section Revised	Revision Description

New York State
Project Plan

EXECUTIVE SUMMARY

New York State
Project Plan

DESCRIPTION OF STAKEHOLDER RESPONSIBILITY

Name/Title	Agency/ Department	Project Role	Responsibility	Phone	Email

New York State
Project Plan

PROJECT PLAN DOCUMENTS SUMMARY

Documents to be Created in Project Initiation	**Documents to be Created in Project Planning**
Project Charter	
Project Scope Statement	*Refined* Project Scope
Project Schedule Worksheet	Project Schedule
Project Quality Management Plan	*Refined* Project Quality Management Plan
Preliminary Budget Estimate *Including Staff Acquisition Plan and Materials Acquisition Plan*	Project Budget
List of Risks	Risk Management Worksheet
Description of Stakeholder Involvement	*Refined* Description of Stakeholder Involvement
Communications Plan	*Refined* Communications Plan
	Change Control Process
	Acceptance Management Process
	Issue Management and Escalation Process
	Organizational Change Management Plan
	Project Team Training Plan
	Project Implementation and Transition Plan

New York State
Project Deliverable Approval Form

PROJECT IDENTIFICATION

Project Name: _____ Date: _____

Project Sponsor: _____ Project Manager: _____

DELIVERABLE INFORMATION

Project Phase: _____ Date: _____

Deliverable Name: _____ Author: _____

ACCEPTANCE CRITERIA

Criteria:

New York State
Project Deliverable Approval Form

REVIEWER INFORMATION

Reviewer Name: _____ Role: _____
Deliverable Name: _____
Recommended Action: Approve: ☐ Reject: ☐
Reviewer Comments:

Reviewer Signature: _____
Date: _____

APPROVER INFORMATION

Approver Name: _____ Role: _____
Action: Approve: ☐ Reject: ☐
Approver Comments:

Approver Signature: _____
Date: _____

New York State
Project Deliverable Approval Form

PROJECT MANAGER INFORMATION

_____
Name (Print)

_____ _____
Signature Date

Project Planning Kick-off Meeting Agenda

Project: _____

Date: _____

Time: From: _____ To: _____

Location: _____

Invitees:

Attendees:

AGENDA

	Presenter Name	Time (minutes)
Introductions		
Sponsor's Statement		
Project Request & Background		
Project Goals & Objectives		
Project Scope		
Roles & Responsibilities		
Next Steps		
Questions		

ADDITIONAL INFORMATION

Handouts:

Project Planning Kick-off Meeting

Project: _____

Date:_____

Time: From: _____ To: _____

Location: _____

DECISIONS

Decision Made	Impact	Action Required?

ISSUES

Issue Description	Impact	Action Required?

ACTION ITEMS FOR FOLLOW UP

Action	Responsible	Target Date

New York State
Project Budget

PROJECT IDENTIFICATION

Project Name: _____ Date: _____

Project Sponsor: _____ Project Manager: _____

New York State
Project Budget

BUDGET INFORMATION

Phase/Process/Task	Labor Cost	Material Cost	Travel Cost	Other Cost	Total Cost per Activity	Planned Date of Expenditure
TOTAL Budget						

COMMENTS: (List any assumptions pertaining to the costs entered above.)

New York State
Project Risk Management Worksheet

Order Risks Risk Probability/Impact: Very Low - Low - Medium - High - Very High Priority Level: 1.00 - 10.00

Project Duration: Less Than 3 Month 3–6 Months 6–12 Months 1–3 Years More Than 3 Years

Baseline As-of Date: _____

Risk	Risk Probability	Impact Description	Level of Impact	Date of Impact	Priority Level	Risk Management Plan

New York State
Project Change Request

PROJECT IDENTIFICATION

Project Name: _____

Project Manager: _____

CHANGE REQUEST INFORMATION

Request Date: _____

Requested By: _____ Agency: _____

Description of Change:

Scope Impact:

Schedule Impact:

Quality Impact:

Cost Impact:

New York State
Project Change Request

REVIEWER INFORMATION

Reviewer Name: _____ Role: _____

Recommended Action: Approve: ☐ Reject: ☐

Reviewer Comments:

Reviewer Signature: _____

Date: _____

New York State
Project Change Request

APPROVER INFORMATION

Approver Name: _____ Role: _____

Action: Approve: ☐ Reject: ☐

Approver Comments:

Approver Signature: _____

Date: _____

PROJECT MANAGER INFORMATION

_____

Name (Print)

_____ _____

Signature Date

New York State
Organizational Change Management Plan

PROJECT IDENTIFICATION

Project Name: _____ Date: _____

Project Sponsor: _____ Project Manager: _____

New York State
Organizational Change Management Plan

PEOPLE CHANGE MANAGEMENT

Organizational Change Activities	Individual/Group(s) Affected	Individual/Group(s) Responsible for Implementation	Required Completion Date	Status

New York State
Organizational Change Management Plan

PROCESS CHANGE MANAGEMENT

Organizational Change Activities	Individual/Group(s) Affected	Individual/Group(s) Responsible for Implementation	Required Completion Date	Status

New York State
Organizational Change Management Plan

CULTURE CHANGE MANAGEMENT

Organizational Change Activities	Individual/Group(s) Affected	Individual/Group(s) Responsible for Implementation	Required Completion Date	Status

New York State
Project Team Training Plan

PROJECT IDENTIFICATION

Project Name: _____ Date: _____

Project Sponsor: _____ Project Manager: _____

TRAINEE INFORMATION

Name	Project Role	Agency	Phone	Email	Skills Required

New York State
Project Team Training Plan

TRAINING PLAN

Name	Type of Training	Description	Planned Start	Planned Completion	Actual Start	Actual Completion	Certification

New York State
Project Implementation and Transition Plan

PROJECT IDENTIFICATION

Project Name: _____ Date: _____

Project Sponsor: _____ Project Manager: _____

New York State
Project Implementation and Transition Plan

PROJECT IMPLEMENTATION PLAN

Implementation Activity	Owner	Who is Affected?	Who is Involved?	Timing/ Dependency

New York State
Project Implementation and Transition Plan

PROJECT TRANSITION PLAN

Transition Activity	Owner	Who is Affected?	Who is Involved?	Timing/ Dependency

Project Execution and Control Kick-off Meeting Agenda

Project: _____

Date: _____

Time: From: _____ To: _____

Location: _____

Invitees:

Attendees:

AGENDA

	Presenter Name	Time (minutes)
Introductions		
Sponsor's Statement		
Project Request & Background		
Project Goals & Objectives		
Project Scope		
Roles & Responsibilities		
Next Steps		
Questions		

ADDITIONAL INFORMATION

Handouts:

Project Execution and Control Kick-off Meeting

Project: _____

Date:_____

Time: From: _____ To: _____

Location: _____

DECISIONS

Decision Made	Impact	Action Required?

ISSUES

Issue Description	Impact	Action Required?

ACTION ITEMS FOR FOLLOW UP

Action	Responsible	Target Date

New York State
Progress Report

To:	Report Period Ending:
From:	Project Name:

The tasks I completed this reporting period are:
■

The tasks I plan to complete next reporting period are:
■

I lost time due to: (Specify hours and cause):
■

Issues:

Description	Date Identified	Impact

Scheduled Vacation/Training:

Description	Start Date	End Date	# of Hours

Time Reporting by Task:

Task ID	Description	Original Estimate	Hours this Week	ETC	Hours to Date
	Reporting Period Total				

New York State
Project Acceptance Form

PROJECT IDENTIFICATION

Project Name: _____ Date: _____

Project Sponsor: _____ Project Manager: _____

PROJECT SPONSOR INFORMATION

Project Sponsor Name: _____

Action: Accept: ☐ Reject: ☐

Project Sponsor Comments:

Project Sponsor Signature: _____

Date: _____

PROJECT MANAGER INFORMATION

_____

Name (Print)

_____ _____

Signature Date

New York State
Project Post-Implementation Survey

GENERAL INFORMATION

Project Name: _____ Date: _____

Your Name: _____ Your Performing Organization: _____

Your Role on the Project: _____ Dates of Your Involvement: _____

Questions	Rating (1-3)	Comments (What worked well? What could have been done better? What recommendations do you have for future projects?)
PRODUCT EFFECTIVENESS		
How well does the product or service of the project meet the stated needs of the Performing Organization?		
How well does the product or service of the project meet your needs?		
When initially implemented, how well did the product or service of the project meet the stated needs of the Performing Organization?		
To what extent were the objectives and goals outlined in the Business Case met?		
What is your overall assessment of the outcome of this project?		
CSSQ MANAGEMENT		
How well did the scope of the project match what was defined in the Project Proposal?		
How satisfied are you with your involvement in the development and/or review of the Project Scope during Project Initiation and Planning?		
Was the Change Control process properly invoked to manage changes to Cost, Scope, Schedule, or Quality?		

New York State
Project Post-Implementation Survey

Questions	Rating (1-3)	Comments (What worked well? What could have been done better? What recommendations do you have for future projects?)
PRODUCT EFFECTIVENESS		
Were changes to Cost, Scope, Schedule, or Quality, effectively managed?		
Was the established change budget adequate?		
As project performance validated or challenged estimates, were the estimates effectively revised and the current and future tasks re-scheduled?		
How closely does the initial Project Schedule compare with the actual schedule?		
How did the estimated Project Budget compare with the total actual expenditure?		
How effectively was the Quality Management Plan applied during Project Execution?		
How effective was the quality assurance process?		
How effective were project audits?		
How effective was the utilization of best practices from prior projects in the Performing Organization?		
RISK MANAGEMENT		
How well were team members involved in the risk identification and mitigation planning process?		
To what extent was the evolution of risks communicated?		
How accurate were the risk probabilities on the Risk Management Worksheet?		
How effectively was the Risk Management Worksheet updated or reviewed?		
How comprehensive was the Risk Management Worksheet? (i.e. did many events occur that were never identified?)		

New York State
Project Post-Implementation Survey

Questions	Rating (1-3)	Comments (What worked well? What could have been done better? What recommendations do you have for future projects?)
COMMUNICATIONS MANAGEMENT		
How effective were the informational materials available to orient team members?		
How satisfied were you with the kick-off meetings you participated in?		
How effectively were the project team meetings conducted?		
How effectively and timely were Progress Reports provided by Team Members to the Project Manager?		
How effectively were stakeholders involved in the project?		
Was communication with stakeholders adequate?		
How well were your expectations met regarding the frequency and content of information conveyed to you by the Project Manager?		
How well was project status communicated throughout your involvement in the project?		
How well were project issues communicated throughout your involvement in the project?		
How well did the Project Manager respond to your questions or comments related to the project?		
How useful was the format and content of the Project Status Report to you?		
How useful and complete was the project repository?		
ACCEPTANCE MANAGEMENT		
How effective was the acceptance management process?		
How well prepared were you to receive project deliverables?		

New York State
Project Post-Implementation Survey

Questions	Rating (1-3)	Comments (What worked well? What could have been done better? What recommendations do you have for future projects?)
ACCEPTANCE MANAGEMENT (Continued)		
How well defined was the acceptance criteria for project deliverables?		
Was sufficient time allocated to review project deliverables?		
How closely did deliverables match what was defined within Project Scope?		
How complete/effective were the materials you were provided in order to make a decision to proceed from one project lifecycle phase to the next? If materials were lacking, please elaborate.		
ORGANIZATIONAL CHANGE MANAGEMENT		
How effectively and timely was the organizational change impact identified and planned for?		
How pro-active was the Organizational Change Management Plan?		
Was sufficient advance training conducted/ information provided to enable those affected by the changes to adjust to and accommodate them?		
Overall, how effective were the efforts to prepare you and your organization for the impact of the product/service of the project?		
How effective were the techniques used to prepare you and your organization for the impact of the changes brought about by the product or service of the project?		

New York State
Project Post-Implementation Survey

Questions	Rating (1-3)	Comments (What worked well? What could have been done better? What recommendations do you have for future projects?)
ISSUES MANAGEMENT		
How effectively were issues managed on the project?		
How effectively were issues resolved before escalation was necessary?		
If issue escalation was required, how effectively were issues resolved?		
How effectively were issues able to be resolved without impacting the Project Schedule or Budget?		
PROJECT IMPLEMENTATION & SUPPORT		
How effective was the documentation that you received with the project product/service?		
How effective was the training you received in preparation for the use of the product/service?		
How useful was the content of the training you received in preparation for the use of the product/service?		
How timely was the training you received in preparation for the use of the product/service?		
How effective was the support you received during implementation of the product/service?		
PERFORMANCE OF THE PERFORMING ORGANIZATION		
How effectively and consistently was sponsorship for the project conveyed?		
How smooth was the transition of support from the Project Team to the Performing Organization?		

New York State
Project Post-Implementation Survey

Questions	Rating (1-3)	Comments (What worked well? What could have been done better? What recommendations do you have for future projects?)
PERFORMANCE OF THE PERFORMING ORGANIZATION (Continued)		
Was there a qualitative difference in the level of support provided by the Project Team during implementation and by the Performing Organization after transition?		
Did the Project Team adequately plan for and prepare the Performing Organization for its ongoing responsibilities for the product or service of the project?		
PERFORMANCE OF THE PROJECT TEAM		
Overall, how effective was the performance of the Project Manager?		
How well did the Project Team understand the expectations of their specific roles and responsibilities?		
How well were your expectations met regarding the extent of your involvement in the project (effort time commitments etc.)?		
How effective was each Project Team member in fulfilling his/her role?		
How effective was team member training?		

New York State
Project Post-Implementation Survey

GENERAL QUESTIONS

Question	Response
What were the most significant issues on this project?	
What were the lessons learned on this project?	
What on the project worked well and was effective in the delivery of the product?	
What other questions should we have asked? What other information would you like to provide to us about this project?	

New York State
Project Post-Implementation Report

PROJECT IDENTIFICATION

Project Name: _____ Date: _____

Project Sponsor: _____ Project Manager: _____

Report Prepared By: _____

CATEGORIES: Categories of the report correspond to the categories in the Project Post-Implementation Survey.

For each category, the Overall Rating is the average of the ratings provided on completed survey forms for that category (1=Not at All, or Poor, 2=Adequately, or Satisfactory, 3=To a great extent, or Excellent)

A. PROJECT EFFECTIVENESS

_____

Overall Survey Rating:

New York State
Project Post-Implementation Report

B. CSSQ MANAGEMENT

Overall Survey Rating:

C. RISK MANAGEMENT

Overall Survey Rating:

D. COMMUNICATIONS

Overall Survey Rating:

New York State
Project Post-Implementation Report

E. ACCEPTANCE MANAGEMENT

Overall Survey Rating:

F. ORGANIZATIONAL CHANGE MANAGEMENT

Overall Survey Rating:

G. ISSUES MANAGEMENT

Overall Survey Rating:

New York State
Project Post-Implementation Report

H. PROJECT IMPLEMENTATION AND TRANSITION

Overall Survey Rating:

I. PERFORMANCE OF PERFORMING ORGANIZATION

Overall Survey Rating:

J. PERFORMANCE OF PROJECT TEAM

Overall Survey Rating:

New York State
Project Post-Implementation Report

K. KEY PROJECT METRICS

Cost

Schedule

Scope

Quality

New York State
Project Repository Table of Contents

PROJECT IDENTIFICATION

Project Name: _____ Date: _____

Project Sponsor: _____ Project Manager: _____

TABLE OF CONTENTS

- Project Proposal
- Business Case
- Project Charter
- Project Scope Statement
- Project Schedule
- Quality Management Plan
- Budget Estimate
- List of Risks/Risk Management Worksheet
- Description of Stakeholder Involvement
- Communications Plan
- Post-Implementation Survey(s)
- Post-Implementation Report
- Change Control Forms
- Signed Approval Forms
- Meeting Notes/Minutes/Correspondence
- Project Status Reports
- Progress Reports
- Project Work Products/Deliverables
- End of Phase Checklists

< Name of Agency >

Business Requirements Document

< System Name >

Agency	
Project Name	
Project Sponsor	
Project Manager	
Document Date	
Prepared By	

Business Requirements Document

TABLE OF CONTENTS

Business Requirements Document

3.0 SPECIFIC REQUIREMENTS

3.1 Business Unit

Description

3.1.1 Business Function 1

Description

- Business Requirement 1 (Priority)
- Business Requirement 2 (Priority)
- Etc.

3.1.2 Business Function 2

Description

- Business Requirement 1 (Priority)
- Business Requirement 2 (Priority)
- Etc.

Business Requirements Document

4.0 BUSINESS REQUIREMENTS NOT BEING IMPLEMENTED

APPENDIX A – Requirements Definition Supporting Details

< Name of Agency >

Functional Specification

< System Name >

Agency	
Project Name	
Project Sponsor	
Project Manager	
Document Date	
Prepared By	

Functional Specification

TABLE OF CONTENTS

Functional Specification

3.1 Sub-system

Sub-System Description

3.1.1 Component Type

Component Type Description

3.1.1.1 Component 1

- Component Description
- Component Mockup (where appropriate)
- Component Business Flow
  - Cross-reference to Business Requirement(s), Logical Data and Process Models
  - Flowchart
  - Detailed Business Rules for each Flowchart element

3.1.1.2 Component 2

- Component Description
- Component Mockup (where appropriate)
- Component Business Flow
  - Cross-reference to Business Requirement(s), Logical Data and Process Models
  - Flowchart
  - Detailed Business Rules for each Flowchart element

Functional Specification

4.0 OTHER SPECIFICATIONS

4.1 Technical Specifications

4.2 Operational Specifications

4.3 Transitional Specifications

5.0 BUSINESS REQUIREMENTS NOT BEING IMPLEMENTED

Functional Specification

APPENDICES – SUPPORTING DOCUMENTS

< Name of Agency >

Technical Architecture

< System Name >

Agency	
Project Name	
Project Sponsor	
Project Manager	
Document Date	
Prepared By	

Technical Architecture

TABLE OF CONTENTS

Technical Architecture

2.0 OVERALL TECHNICAL ARCHITECTURE

2.1 System Architecture Context Diagram

2.2 System Architecture Model

2.2.1 Overall Architectural Considerations

2.3 System Architecture Component Definitions

2.3.1 System Architecture Component A

2.3.2 System Architecture Component B

Technical Architecture

3.0 SYSTEM ARCHITECTURE DESIGN

3.1 System Architecture Component A

3.1.1 Component Functions

3.1.2 Technical Considerations

3.1.3 Selected Product(s)

3.1.4 Selection Rationale

3.1.5 Architecture Risks

3.2 System Architecture Component B

Technical Architecture

4.0 SYSTEM CONSTRUCTION ENVIRONMENT

4.1 Development Environment

4.1.1 Developer Workstation Configuration

4.1.2 Supporting Development Infrastructure Configuration

4.2 QA Environment

4.2.1 QA Workstation Configuration

4.2.2 Supporting QA Infrastructure Configuration

4.3 Acceptance Environment

4.3.1 Acceptance Workstation Configuration

4.3.2 Supporting Acceptance Infrastructure Configuration

< Name of Agency >

System Standards

< System Name >

Agency	
Project Name	
Project Sponsor	
Project Manager	
Document Date	
Prepared By	

System Standards

TABLE OF CONTENTS

System Standards

2. 0 MODULE DEVELOPMENT STANDARDS

2.1 Graphical User Interface

2.2 Reporting

2.3 Application Navigation

2.4 Error Prevention and Correction

2.5 Programming

2.6 Documentation

2.7 Naming Conventions

2.8 Database, Data Access and Data Views

2.9 Miscellaneous Standards

System Standards

3.0 CONFIGURATION MANAGEMENT STANDARDS

3.1 Development Environment

3.1.1 Software Management

3.1.2 Database Management

3.2 QA Environment

3.2.1 Software Management

3.2.2 Database Management

3.3 Acceptance Environment

3.3.1 Software Management

3.3.2 Database Management

System Standards

4.0 RELEASE MANAGEMENT STANDARDS

4.1 Migration from Development to QA Environments

4.1.1 Software Migration

4.1.2 Data Migration

4.2 Migration from QA to Acceptance Environments

4.2.1 Software Migration

4.2.2 Data Migration

System Standards

5.0 TESTING STANDARDS

5.1 Unit Testing

5.1.1 Unit Testing Standards

5.1.2 Unit Testing Tools

5.2 Integration and System Testing

5.2.1 Integration/System Testing Standards

5.2.2 Integration/System Testing Tools

5.3 Acceptance Testing

5.3.1 Acceptance Testing Standards

5.3.2 Acceptance Testing Tools

< Name of Agency >

Technical Specifications

< System Name >

Agency	
Project Name	
Project Sponsor	
Project Manager	
Document Date	
Prepared By	

Technical Specifications

TABLE OF CONTENTS

Technical Specifications

2.0 SYSTEM ARCHITECTURE

2.1 Refined System Context Diagram

2.2 Refined System Architecture Context Diagram

2.3 Refined System Architecture Model

2.4 Refined Business Flow Diagram

2.5 Refined System Interface Diagram

2.6 System Development Diagram

Technical Specifications

3.0 MODULE SPECIFICATIONS

3.1 Sub-System A

3.1.1 Module A-1

3.1.1.1 Module Overview

3.1.1.2 Interface Prototype

3.1.1.3 Customer Decision-Maker(s)

3.1.1.4 Customer Representative(s)

3.1.1.5 Business Requirement(s)

3.1.1.6 Inputs

3.1.1.7 Interfaces

3.1.1.8 Security Considerations

3.1.1.9 Logic Flow

3.1.1.10 Outputs

3.1.1.11 Database Access

3.1.1.12 Common Elements Used

3.1.1.13 Module Review Process

3.1.1.14 Audit Tracking

3.1.1.15 Special Considerations

Technical Specifications

3.1.1.16 Unit Test Plan

Unit Test Case

Unit Test Case Number:
Unit Test Case Name:
Purpose of Test Case:
Unit Test Data:
Data Source A Value(s):
Data Source B Value(s):
Navigation:
Navigation Directions
Expected Results:
Narrative
Comments:
Additional Testing Consideration

Unit Test Results:

Tester:
Name
Date Time
Results:
Passed: _____ Failed: _____
Justification:

3.1.2 Module A-2

3.2 Sub-System B

3.2.1 Module B-1

3.2.2 Module B-2

Technical Specifications

4.0 INTEGRATION TEST PLAN

4.1 Integration Packet 1

Integration Test Case
Integration Test Case Number:
Integration Test Case Name:
Module List:
Purpose of Integration Test Case:
Integration Test Data:
Data Source A Value(s):
Data Source B Value(s):
Navigation:
Navigation Directions
Expected Results:
Narrative
Comments:
Additional Testing Consideration
Integration Test Results:
Tester:
Name:
Date: Time:
Results:
Passed: _____ Failed: _____
Justification:
Verifier:
Name:
Date: Time:

4.2 Integration Packet 2

Technical Specifications

5.0 SYSTEM TEST PLAN

5.1 System Test Packet 1

System Test Case
- System Test Case Number:
- System Test Case Name:
- Module List:
- Purpose of System Test Case:
- System Test Data:
  - Data Source A — Value(s):
  - Data Source B — Value(s):
- Navigation:
  - Navigation Directions
- Expected Results:
  - Narrative
- Comments:
  - Additional Testing Consideration

System Test Results:
- Tester:
  - Name:
  - Date: — Time:
- Results:
  - Passed: _____ — Failed: _____
  - Justification:
- Verifier:
  - Name:
  - Date: — Time:

5.2 System Test Packet 2

Technical Specifications

6.0 ACCEPTANCE TEST PLAN

6.1 Acceptance Test Packet 1

Acceptance Test Case
- Acceptance Test Case Number:
- Acceptance Test Case Name:
- Module List:
- Purpose of Acceptance Test Case:
- Acceptance Test Data Preparation:
  - Data Preparer:
- Data Sources and Values:
- Acceptance Case Description:
  - Business Rules, Requirements and Conditions being tested:
  - Navigation directions:
- Expected Results:
  - Narrative
- Comments:
  - Additional Testing Consideration
- Acceptance Test Results:
  - Tester:
    - Name:
    - Date: Time:
  - Results:
    - Passed: _____ Failed: _____
    - Justification:
  - Defect Resolution:
    - Application Developer:
    - Resolved Date:
  - Re-Tester:
    - Name:
    - Date: Time:
  - Results:
    - Passed: _____ Failed: _____
    - Justification:
  - Approval:
    - Name:
    - Date: Time:

6.2 Acceptance Test Packet 2

Technical Specifications

7.0 DEPLOYMENT AND TRANSITION PLANS

7.1 Consumer Training and Deployment

7.2 Data Preparation

7.3 Software Migration

7.4 Production Start-up

7.5 Production Verification

7.6 Performing Organization Training and Transition

8.0 OPERATIONAL CONSIDERATIONS

< Name of Agency >

Defect Log for <Testing Performed>

< System Name >

Agency	
Project Name	
Project Sponsor	
Project Manager	
Document Date	
Prepared By	

Defect Log for <Testing Performed>

DEFECT SUMMARY

Defect Identification		Test Results			Defect Resolution		Approval		
Defect #	Status	Test Case #	Tester	Date	Application Developer	Resolved Date	Re-Tester Date	Date	Approved

Defect Log for <Testing Performed>

DEFECT DETAILS

Defect #:		Defect Details Updated By:		Date:	
Defect Description					
Resolution Description **or** **Action Plan**					

3 SUGGESTED READINGS

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Internet Resources

www.cio.com - Internet site for "CIO Magazine" featuring articles and information on technology management.

www.fastcompany.com - Internet site for "Fast Company" magazine featuring articles and information on project management trends and issues.

www.pmblvd.com - Project management "portal" site offering links to a wide variety of management-related information.

www.pmi.org - Home site for the Project Management Institute offering resources, links and information about the institute and general project management issues.

www.projectworld.com - Resource for seminars and conventions related to the project management discipline.

www.gantthead.com – Project management advise site developed "by project managers for project managers." A key feature includes templates and descriptions of "typical" project deliverables.

Like any subject on the Internet, there are millions of pages dedicated to project management. And like any other subject, finding the useful information is a challenge. Although this is not an exhaustive list of project management resources on the web, these sites are an excellent launch point for additional information.

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