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Project Management Plan

Version *<1.0>*

*<mm/dd/yyyy>*

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REVISION HISTORY

[Provide information on how the development and distribution of the Project Management Plan was controlled and tracked. Use the table below to provide the version number, the author implementing the version, the date of the version, the name of the person approving the version, the date that particular version was approved, and a brief description of the reason for creating the revised version.]

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| **Ver #** | **Date** | **Comment** | **Prepared By** | **Reviewed By** | **Approved By** |
| 1.0 | *<MM/DD/YY>* | *<Description>* | *<Author name>* | *<Author name>* | *<Author name>* |
|  |  |  |  |  |  |
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***Note to the Author***

[This document is a template of a Project Management Plan document for a project. The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the project.

* Blue italicized text enclosed in square brackets ([text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.
* Blue italicized text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a particular project.
* Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate to a specific project. These are offered only as suggestions to assist in developing project documents; they are not mandatory formats.

When using this template for your project document, it is recommended that you follow these steps:

1. Replace all text enclosed in angle brackets (e.g.,, <Project Name>) with the correct field values. These angle brackets appear in both the body of the document and in headers and footers. To customize fields in Microsoft Word (which display a gray background when selected):
	1. Select File>Properties>Summary and fill in the Title field with the Document Name and the Subject field with the Project Name.
	2. Select File>Properties>Custom and fill in the Last Modified, Status, and Version fields with the appropriate information for this document.
	3. After you click OK to close the dialog box, update the fields throughout the document with these values by selecting Edit>Select All (or Ctrl-A) and pressing F9. Or you can update an individual field by clicking on it and pressing F9. This must be done separately for Headers and Footers.
2. Modify boilerplate text as appropriate to the specific project.
3. To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the Section Headings are Heading 1, Heading 2 and Heading 3. Style used for boilerplate text is Body Text.
4. To update the Table of Contents, right-click and select “Update field” and choose the option- “Update entire table”
5. Before submission of the first draft of this document, delete this “Notes to the Author” page and all instructions to the author, which appear throughout the document as blue italicized text enclosed in square brackets.]

# Introduction

This Project Management Plan (PMP) provides detailed plans, processes, and procedures for managing and controlling the life cycle activities of the *<Project Name>* project. It describes the processes and approaches for managing (i.e., planning, monitoring, and controlling) the project. The information in this PMP provides the basis for communication and understanding among project team members and all other stakeholders.

## Purpose of PMP

[Provide the purpose of the project PMP.]

The intended audience of the *<Project Name>* PMP is all project stakeholders including the project sponsor, senior leadership and the project team

# Project Overview

[Provide an Overview of the approved project. Sample overview are as follow;]

*<*To eliminate the current paper process for servicing homebound clients and the staff’s necessity to enter the same data into two separate systems, *<Client Name>* wishes to implement a *<Project Name>* with equivalent functions that are consistent with the requested workflows. The mobile application will be developed following *<Client Name>* standard guidelines of Application Development that include using a hybrid platform. The solution will seamlessly integrate with current systems and applications without sacrificing needed functions.*>*

# Scope

## Project Objectives

[Insert the project’s scope management plan or provide a reference to where it is stored. Sample objectives are as follow;]

### Business Objectives

| Number | Description |
| --- | --- |
| Bus. Objective 1 | *<The goal is to build single data entry system which will allow one-time entry of data for all integrated applications and supported programs.>* |
| Bus. Objective 2 | *<Insert business objective>* |
| Bus. Objective 3 | *<Insert business objective>* |
| Bus. Objective 4 | *<Insert business objective>* |
| Bus. Objective 5 | *<Insert business objective>* |

Table 1 : Business Objectives

### Technical Objectives

[Insert the project’s technical objectives plan or provide a reference to where it is stored. Sample objectives are as follow;]

| Number | Description |
| --- | --- |
| Tech. Objective 1 | *<To build the platform independent application which will work on both Android and iOS.>* |
| Tech. Objective 2 | *<Insert technical objective>* |
| Tech. Objective 3 | *<Insert technical objective>* |
| Tech. Objective 4 | *<Insert technical objective>* |

Table 2`: Technical Objectives

### Quality Objectives

[Insert the project’s Quality objectives plan or provide a reference to where it is stored. Sample objectives are as follow;]

| Number | Description |
| --- | --- |
| Qual. Objective 1 | To ensure that performance of the solution meets client expectation |
| Qual. Objective 2 | To deliver the solution with minimal bugs. |
| Qual. Objective 3 | To deliver the solution as per the agreed scope. |

Table 3 : Quality Objectives

## Deliverables

### Project Management Plan

|  |  |
| --- | --- |
|  |  |
| The Project Management Plan (PMP) provides the industry accepted guidelines to plan, execute, control, and close a project.  | **Deliverable Acceptance Criteria** - Includes the processes and procedures to manage the project, including:* Project Overview
* Scope
* Deliverables and Acceptance Criteria
* Risk Management Plan
* Issue Management Plan
* Scope Management Plan
* Change Request Management Plan
* Schedule Management Plan
* Communication Management Plan
* Quality Management Plan
* Configuration Management Plan
 |
|  |
| **Quality Review** - Review by Project Managers. Final approval by Engagement Director |

Table 4 : Project Management Plan

### Microsoft Project Plan and Schedule

|  |  |
| --- | --- |
|  |  |
| The Microsoft Project Plan is a schedule of tasks showing assigned resources, estimated effort, duration, start and finish dates. The Project Manager uses the Project Plan to manage the project and report on status and variances to the customer. | **Deliverable Acceptance Criteria** - Includes the following data items:* Lists all the project milestones
* Displays dependencies
* Assigns one or more resources to each task
* Display estimates of effort
* Shows start and finish dates
 |
|  |
| **Quality Review** - Review by Project Managers. Final approval by *<Client Name>* teams and *<Client Name>* PMO. |

Table 5 : Microsoft Project Plan and Schedule

### Client Requirements -

|  |  |
| --- | --- |
| TITLE | TITLE |
| The Client requirements as documented using Jira (User Stories) specifies business owner expectations, requirements, acceptance criteria, and deliverables.  | **Deliverable Acceptance Criteria** – User Stories include the acceptance criteria |
|  |
| **Quality Review** - Review by Project Team and Project Managers. Final approval by *<Client Name>* team and Business/Program team. |

Table 6 : Client Requirements Document

### Application Design

|  |  |
| --- | --- |
| TITLE | TITLE |
| The high-level overview of the design considerations, architecture, workflow, and database design of the project documented in a word document.  | **Deliverable Acceptance Criteria** – Includes the following sections:* Design Considerations
* Security
* Architecture description
* Application Workflow
* Application Design including sequence diagrams
* Interface Specifications
* Database Design
 |
|  |
| **Quality Review** - Review by Project Team and Project Managers. Final approval by *<Client Name>* Enterprise Architect and Application Delivery Head |

Table 7: Application Design

### Application Code

|  |  |
| --- | --- |
| TITLE | TITLE |
| Complete application code, Cue-me licenses and Configuration files that are part of the project.  | **Deliverable Acceptance Criteria** – *<Client Name>* QA and UAT sign off |
|  |
| **Quality Review** – Code review by Project Team. Final approval by Architect |

Table 8: Application Code

### Test Scripts

|  |  |
| --- | --- |
| TITLE | TITLE |
| All the Test Scripts that are used for System testing  | **Deliverable Acceptance Criteria** – Should cover all the application features and functionalities  |
|  |
| **Quality Review** - Review by Project Testing Team. Final approval by Project Manager |

Table 9: Test Scripts

### Training Guide

|  |  |
| --- | --- |
| TITLE | TITLE |
| Training guide used for training the trainers | **Deliverable Acceptance Criteria** – Should cover all the application features and functionalities. |
|  |
| **Quality Review** - Review by Project Team and Project Manager. Final approval by *<Client Name>* and Business teams. |

Table 10: Training Plan

### Release Notes / Run Book

|  |  |
| --- | --- |
| TITLE | TITLE |
| Release Notes and Run Book for production release | **Deliverable Acceptance Criteria** – NA |
|  |
| **Quality Review** - Review by Project Team and Project Manager |

Table 11: Release Notes/Rule Book

# Project Management and Controls

[Insert the project’s risk management plan or provide a reference to where it is stored.]

## Risk Management Plan

A risk is an event or condition that, if it occurs, could have a positive or negative effect on a project’s objectives. Risk Management is the process of identifying, assessing, responding to, monitoring, and reporting risks. This Risk Management Plan defines how risks associated with the *<Project Name>* project will be identified, analyzed, and managed. It outlines how risk management activities will be performed, recorded, and monitored throughout the lifecycle of the project. The Risk Management Plan is created by the project manager in the Planning Phase of the project and is monitored and updated throughout the project.

### Risk Management Strategy

The project manager working with the project team and project stakeholders will ensure that risks are actively identified, analyzed, and managed throughout the life of the project. Every effort will be made to proactively identify risks ahead of time in order to implement a mitigation strategy from the project’s onset.

The most likely and highest impact risks were added to the project schedule to ensure that the assigned risk managers take the necessary steps to implement the mitigation response at the appropriate time during the schedule. Risk managers will provide status updates on their assigned risks in the weekly project team meetings, but only when the meetings include their risk’s planned timeframe.

Upon the completion of the project, during the closing process, the project manager will analyze each risk as well as the risk management process. Based on this analysis, the project manager will identify any improvements that can be made to the risk management process for future projects. These improvements will be captured as part of the lessons learned knowledge base.

| Risk Owner | Role | Responsibility / Ownership |
| --- | --- | --- |
| *<owner Name>*  | PM | * Overall owner for the risk management process
* Risks related to delivery schedule and budget
* Risks related to implementation and System testing
* Risks related to Project resources
* Verification of Risk register
* Implementation of Risk Mitigation
 |
| *<owner Name>* | PM | * Risks related to schedule for project subsidiary plans
* Risks related to *<Client Name>* UAT, training and roll out
* Verification of Risk register
* Implementation of Risk Mitigation
 |
| *<owner Name>*  | Architect | * Risks related to overall System and Application architecture
 |
| *<owner Name>*  | Project Lead | * Risks related to Scope
* Risks related to Training
* Risks related to Application design and implementation
* Risks related to Development Schedule
 |
| *<owner Name>*  | QA | * Risks related to Quality assurance processes
 |
| *<owner Name>*  | Test Lead | * Risks related to Application Testing
* Risks related to Testing Schedule
 |
| *<owner Name>*  | Infrastructure Support | * Risks related to Infrastructure
 |

Table 12: RM Roles and Responsibilities

### Risk Identification

Risk identification will involve the project team, appropriate stakeholders, and will include an evaluation of environmental factors, organizational culture and the project management plan including the project scope. Careful attention will be given to the project deliverables, assumptions, constraints, WBS, cost/effort estimates, resource plan, and other key project documents.

A Risk Register will be created and updated as needed and will be stored electronically in the SharePoint. The risk will be categorized as Schedule Risk, Budget Risk, Scope Risk, Business Risk, Technology/Architecture Risk, Training Risk, Security Risk, Infrastructure Risk, Resource Risk, Quality Risk, Roll Out Risk, Migration Risk, Organizational Risk.

### Risk Analysis

All risks identified will be assessed to identify the range of possible project outcomes. Risk analysis is an evaluation of the identified risk events to determine the likelihood of the events occurring and their impact, to assign a risk rating based on the project criteria and to prioritize the risks. Quantification will be used to determine which risks are the top risks to pursue and respond to and which risks can be ignored. For each risk event, the following risk analysis guidelines are used:

**Risk Quantification**

Risk quantification is done based on the combination of likelihood of risk occurrence and consequence of risk. Evaluation of likelihood and consequence is based on the following parameters:

1. Schedule
2. Cost
3. Effort

The likelihood of identified risks can be quantified and assessed in a scale of 1 – Rare/ unlikely), 3 – Possible to occur, and 9 – Likely to occur. The following table may be referred to in assessing the likelihood of identified risks:

| **Level** | **Likelihood** | **Description** |
| --- | --- | --- |
| 1 | Unlikely | * Extremely unlikely; May only occur in exceptional cases; Has never occurred before unlike to occur, but possible; Occurred only once till now
 |
| 3 | Possible to occur | * May occur, but not definite; Has occurred once or twice before
 |
| 9 | Likely to occur | * Will probably occur; Has occurred several times before; Continuous exposure to risk; Has occurred before regularly and frequently
 |

Table 13: Likelihood of Identified Risk

The consequence of identified risks can be quantified and assessed on a scale of 1 – Low, 3 – Medium, and 9 – High. The following table may be referred to in assessing the consequence of identified risks:

| **Level** | **Consequence** | **Description** |
| --- | --- | --- |
| 1 | Low | * No financial loss; No impact on work and schedules; Very less financial loss; Slight impact on work and schedules; Preventive actions required (loss < 0.25% of budget amount)
 |
| 3 | Medium | * Less or moderate financial loss; May affect one or two departmental objectives (loss > 0.35% of budget amount)
 |
| 9 | High | * Considerable financial loss; Departmental objectives cannot be achieved (loss > 0.5% of budget amount)
 |

Table 14: Consequence of Identified Risk

Risk quantification will be done based on the following table:

| **Risk Consequence 🡪** | **High (9)** | **Medium (3)** | **Low (1)** |
| --- | --- | --- | --- |
| **Risk Likelihood**  |
| Likely to occur (9) | 81 | 27 | 9 |
| Possible to occur (3) | 27 | 9 | 3 |
| Rare/ unlikely (1) | 9 | 3 | 1 |

Table 15: Risk Quantification

### Risk Mitigation Approach

Mitigation and contingency plans will be prepared for risks, where Risk Score is 9 and above and will be documented in risk management plan. While implementing the mitigation plans, evaluate the cost benefit analysis of the mitigation plan.

Each major risk (those equal and above Risk Score 9) will be assigned to a project team member for monitoring purposes to ensure that the risk will not “fall through the cracks”.

For each risk, one of the following approaches will be selected to address it:

* **Avoid** – eliminate the threat by eliminating the cause
* **Mitigate** – Identify ways to reduce the probability or the impact of the risk
* **Accept** – Nothing will be done
* **Transfer** – Make another party responsible for the risk (buy insurance, outsourcing, etc.)

For each risk that will be mitigated, the project team will identify ways to prevent the risk from occurring or reduce its impact or probability of occurring. This may include prototyping, adding tasks to the project schedule, adding resources, etc.

For each risk that is to be mitigated or that is accepted, a course of action will be outlined for the event that the risk does materialize in order to minimize its impact (mitigation plan will be mentioned in Risk Register).

### Risk Monitoring, Controlling, And Reporting

The project risks will be tracked, monitored and reported throughout the project lifecycle. There are 2 levels of risk monitoring – Each Risk Owner monitoring and reporting, and PM is also monitoring the risks. Overall risk register status reporting will be taken care by PM and reported to as per below.

* Once the risk is occurred then PM will take necessary actions as per the risk mitigation plan present in the risk register.
* All risks with score 27 or higher will be reported as a component of the project status reporting process for this project.
* All project change requests will be analyzed for their possible impact to the project risks.
* Risk owners will provide status updates on their assigned risks in the weekly project team meetings

[The Risk Log is normally maintained as a separate document. Provide a reference to where it is stored.]

Risk Register will be used to track the project risks and will be stored on SharePoint Online. The Risk Register will be updated weekly and shared internally with Engagement Director. The key risks which may have impact to timeline or budget will be shared with DSS in the weekly report. The location of Risk Register for this project is provided in [Appendix C](#_Appendix_C:_Risk).

### Risk Escalation Strategy

PM will escalate all those risks as per the [escalation matrix](#_DSS_Escalation_Matrix_1), which are most likely to occur or have occurred and whose risk mitigation plan is not getting implemented for any reason and PM needs corrective action to mitigate the risk that has occurred. DSS stakeholders as mentioned in escalation matrix will provide the final decision for next steps and updated mitigation plan accordingly is updated in the Risk Register.

## Issue Management Plan

[Insert the project’s issue management plan or provide a reference to where it is stored.]

An issue is a problem, opportunity, query, concern or situation that will impede the progress or successful completion of the project and requires immediate resolution. This issue management plan defines activities and business rules to manage and control issues that arise during the project. Issues should be resolved as quickly as possible to minimize the impact.

### Issue Management Strategy

The purpose of the plan is to bring visibility to issues and accountability for how issues are acted upon and helps ensure issues are resolved effectively and in a timely manner. Observing business rules for prioritization and escalation ensures that issue management is consistent with the project’s objectives. The two major goals of issue management plan are -

* Issues are identified, evaluated, prioritized and assigned for resolution.
* Issue resolutions or decisions are documented and communicated to all affected parties

### Issue Prioritization

Priority categories provide a ranking to help determine the order of importance or urgency to address the issue. The project sponsor, key stakeholders, and project manager should agree on the business rule that underlies each priority. The driving project constraints and the impact of the issue determine whether the resolution of an issue receives a critical, high, medium, or low priority.

| **Priority** | **Description** |
| --- | --- |
| Critical | The project cannot proceed without issue resolution |
| High | The project can proceed, but there is a high potential for rework if the issue is not resolved soon |
| Medium | The project can proceed, but there is a medium potential for rework if the issue is not resolved soon |
| Low | Quick resolution is not urgent. The project can proceed, but the issue will need to be resolved prior to project completion |

Table 16: Issue Prioritization

### Issue Monitoring, Controlling, And Reporting

The project issues will be tracked, monitored and reported throughout the project lifecycle by project team and stakeholders. Issue Log will be used to track the project issues for closure and will be stored on SharePoint Online. Once issue is logged, Project Lead, Test Lead, or PM (as required) will follow up for issue resolution. The Issue Log will be reviewed by PM for timely update and any escalations.

| Team Member | Role | Responsibility / Ownership |
| --- | --- | --- |
| *<owner Name>*  | PM | * Overall owner for the Issue management process
* Issues related to schedule for project subsidiary plans
* Issues related to *<Client Name>* UAT, training and roll out
* Verification of Issue Log
* Implementation of Issue resolution
 |
| *<owner Name>*  | PM | * Issues related to delivery schedule and budget
* Issues related to implementation and system testing
* Issues related to project resources
* Verification of Issue Log
* Implementation of Issue resolution
 |
| *<owner Name>*  | Architect | * Issues related to overall System and Application architecture
 |
| *<owner Name>*  | Project Lead | * Issues related to Scope
* Issues related to Application design and implementation
* Issues related to Development Schedule
 |
| *<owner Name>*  | QA Manager | * Issues related to Quality assurance processes
 |
| *<owner Name>*  | Test Lead | * Issues related to Application Testing
* Issues related to Testing Schedule
 |
| *<owner Name>*  | Infrastructure Support | * Issues related to Infrastructure
 |

Table 17: Issue Monitoring, Controlling and Reporting

All high and critical issues will be maintained and reported by Project Manager as a component of the project status reporting process for this project. All “Change requests” will be analyzed for their possible impact to the project risks.

[The Issue Log is normally maintained as a separate document. Provide a reference to where it is stored.]

The location of Issue Log for this project is provided in [Appendix D](#_Appendix_D:_Issue).

### Issue Escalation and Resolution Process

PM will escalate all “High” and “Critical” priority issues as per [escalation matrix](#_DSS_Escalation_Matrix). PM will take directions from the persons listed in escalation matrix.

## Scope Management Plan

The purpose of this Scope Management Plan is to document the defined scope management approach and processes, as well as the roles and responsibilities for stakeholders participating in those processes. It describes how the project team will define and develop the project scope, create the Work Breakdown Structure (WBS), validate the scope, verify completion of project deliverables, control the scope baseline, and handle scope changes.

### Scope Definition

The scope for this project is defined by the requirements as documented in *<JIRA/TFS User Stories.>* *<JIRA/TFS>* User Stories will be prepared based on the requirement gathering sessions with the DSS stakeholders. It will capture in detail all the use cases, wireframes and API details.

SRS (*<JIRA/TFS>* User Stories) will be reviewed and signed off by *<Client name>* team. Once the SRS (*<JIRA/TFS>* User Stories) is signed off, it will become the project scope baseline for comparing the deliverables with requirements. The project scope is to be sub-divided into smaller deliverables in WBS and will also include the major milestones and dependencies.

### Roles and Responsibilities

The following table describes the Roles and Responsibilities of those involved in the Scope Management process

| **Team Member** | **Role** | **Responsibility** |
| --- | --- | --- |
| *<owner Name>*  | Project Sponsor | * Reviews escalated scope issues and provide direction for resolution.
* Approves major scope change requests.
* Overall decision-making responsibility for Scope Management activities.
 |
| *<owner Name>*  | Change Control Board members | * Participates in Scope definition activities.
* Provides final approval of Scope Management Plan (if decision-making committee).
* Reviews major scope change requests and makes final decision or recommendations to the Project Sponsor.
 |
| *<owner Name>*  | Project Manager | * Overall responsibility for scope management.
* Oversees the scope change management process.
* Overall responsibility for updating and responding to comments in User Stories in DSS Jira and keeping SVAM Jira in sync for requirements only
* Interacts with client for scope change reviews and approvals
* Escalates scope and change issues.
* Ensures that scope changes are incorporated into appropriate project documents
 |
| *<owner Name>*  | Project Manager | * Approves scope change requests within his/her authority.
* Verifies updates made to SVAM Jira
* Escalates scope and change issues.
* Ensures that scope changes are incorporated into appropriate project documents
 |
| *<owner Name>*  | Project Lead | * Help develop the project scope statement.
* Submit scope change requests.
* Review Scope Change requests when assigned.
* Provide feedback as and when required.
* Participate in team-level scope change reviews.
* Update RTM
 |
| *<owner Name>*  | Test Lead | * Help evaluate testing impact for scope changes
* Update test scripts
* Update RTM
 |
| *<owner Name>*  | QA Manager | * Provides an ongoing independent review and analysis of project scope management practices.
* Monitors scope changes and provide feedback.
* Verifies RTM update
 |

Table 18: Roles and Responsibilities

### Scope Monitoring, Control and Reporting

The project scope will be as documented in Jira User Stories (location provided in [Appendix E](#_Appendix_E:_DSS)). The scope will be monitored and controlled throughout the lifecycle of the project. Controlling the project scope involves monitoring the status of the project, finding whether the deliverables meet documented requirements, and managing changes to project scope baseline. After the scope is signed off, proposed scope changes may be initiated by the Project Manager, Stakeholders or any member of the project team.

For each change request, a formal Change Request document will be created. The scope change request will be documented in the Change Log (location provided in [Appendix F](#_Appendix_F:_)). All change requests will be submitted to the Project Manager who will then evaluate the requested scope change. If the scope change is within acceptable limit (<5 days), the Project Manager may approve the change. The cumulative requests for scope change should be capped at 30 days, beyond which any further request for scope change will be reviewed by Change Control Board (CCB) as defined in [Change Management Plan](#_Change_Control_Board).

If the level of effort for Change Request is more than 5 days or the quota of 30 days is exhausted, the Project Manager will submit the scope change request to the Change Control Board for acceptance. Upon approval of scope changes by the Change Control Board the Project Manager will ensure that all relevant project artifacts are updated and communicated regarding the scope change to all relevant stakeholders.

At minimum, below documents needs to be updated and reviewed for each change request –

| **Document** | **Submitted / Updated By** | **Reviewed / Approved By** |
| --- | --- | --- |
| Change request Form | Project Lead | PM |
| Change Request Approval | Project Lead | PM or CCB |
| User Story update | Project Lead | PM |
| RTM Update | Project Lead / Test Lead | PM |
| Test plans and cases | Test Lead | PM |
| Milestone Plan | Project Lead | PM / CCB |
| Project Schedule | Project Lead | PM  |

Table 19: Project Articles Affected By Scope Change

The Project Sponsor is responsible for formally accepting the project’s final deliverable. This acceptance will be based on a review of all project documentation, testing results, and completion of all tasks/work packages and product functionality. The Change Log will be updated weekly and all the open change requests will be reported in the weekly status report.

### Scope Verification/Validation

Scope verification is the process of determining how deliverables will be compared to the original project scope. Project deliverables will be verified against the project scope (as documented in User Stories) throughout the life of the project. MPOS project will use Requirement traceability matrix (RTM) to track the deliverable against the project scope. The verification of RTM update will be done by the QA team member.

## Change Request Management Plan

[Example of Change Control: If a development server for your project is administered by another organization that is responsible for installing machine upgrades and there are scheduled outages that will impact your project schedule. Changes to the project will need to be made to deal with the potential impact of the scheduled outage.]

This Change Request Management Plan documents and tracks the necessary information required to effectively manage project change from project inception to delivery. Its intended audience is the project manager, project team, project sponsor and any senior leaders whose support is needed to carry out the plan.

### Change Request Management Process

The Change Management process establishes an orderly and effective procedure for tracking the submission, coordination, review, evaluation, categorization, and approval for release of all changes to the project’s baselines.

### Change Request Management Process Flow

The following outlines the change request process for this project –

| **Step** | **Responsible** | **Description** |
| --- | --- | --- |
| Generate CR | Project Lead | Project Lead generates a CR based on the changes suggested by *<Client Name>* team. |
| Log CR Status | Project Lead | Project Lead enters the CR into the Change Log. The CR’s status is updated throughout the CR process as needed. |
| Evaluate CR | Project Lead and team | Project Lead along with the team analyze the CR and provide an estimated level of effort to process, and develop a proposed solution for the suggested change |
| Review CR | Project Manager | PM reviews the CR and decides if required to be sent to CCB |
| Authorize | Project Manager / CCB | PM or CCB either approves or rejects the CR |
| Implement | Project Team | If approved, make the necessary updates to the artifacts to carry out the requested change and communicate CR status to the submitter. |

Table 20: Change Request Process

 

Figure 1 : Change Request Process Flow

### Change Request Evaluation & Impact Analysis

To evaluate and prioritize a change request, the “priority” and “type” of the change are taken into consideration. The first and second tables below lists and defines the “priority” and “type” data elements that are applicable for this project.

Change requests are evaluated using the following priority criteria:

| **Priority** | **Description** |
| --- | --- |
| Critical | Change is required for compliance |
| High | Change is required by business  |
| Medium | Change affects overall user experience |
| Low | Change is good to have but not critical to user experience |

Table 21: Change Priority list

Change requests are evaluated and assigned to one or more of the following change types:

| **Type** | **Description** |
| --- | --- |
| Schedule | Change affecting time |
| Cost | Change affecting cost |
| Effort | Change affecting effort |
| Deliverables | Change affecting deliverables |
| Processes | Change affecting process |

Table 22: Change type list

Evaluation and impact analysis document is prepared by the Project Lead with help from the development team.

### Change Control Board

A Change Control Board (CCB) is a formally constituted group of stakeholders responsible for reviewing, approving or rejecting changes to the project baselines. This group may meet on a predefined schedule or on an as needed basis. The table below provides a brief description of personnel acting as the members of CCB.

| **Name** | **Contact** | **Responsibility** |
| --- | --- | --- |
| *<Owner Name>*  | *< emaili*d*@abc.com >* | Change Approver |
| *<Owner Name>*  | *< emaili*d*@abc.com >* | Change Approver |
| *<Owner Name>*  | *< emaili*d*@abc.com >* | Change Coordinator |
| *<Owner Name>*  | *< emaili*d*@abc.com >* | Change Approver |
| *<Owner Name>*  | *< emaili*d*@abc.com >* | Change Approver |
| *<Owner Name>*  | *< emaili*d*@abc.com >* | Provides Business Justification for change |
| *<Owner Name>*  | *< emaili*d*@abc.com >* | Provide oversight for change management process |
| *<Owner Name>*  | *< emaili*d*@abc.com >* | Coordinate with client and shares the effort and impact analysis |
| *<Owner Name>*  | *< emaili*d*@abc.com >* | Provides Overall project impact due to change and level of effort |
| *<Owner Name>*  | *< emaili*d*@abc.com >* | Prime Vendor to get the legal process in motion, once the CR is approved |
| *<Owner Name>*  | *< emaili*d*@abc.com >* | Prime Vendor to get the legal process in motion, once the CR is approved |

Table 23: Change Control Board Roles and Responsibilities

### Change Request Management Monitoring and Control

The change management activities will be monitored to ensure timely response to outstanding CRs. A Change Log will be maintained, which will list all the changes and status of each change. The Change log will be updated weekly by Project Lead and will be stored in SharePoint. PM will review the Change Log for timely updates and accuracy.

All critical, high and medium priority changes will be included in weekly status report. Change requests are evaluated and assigned one of the following status types and these statuses will be part of the Change log:

| **Status** | **Description** |
| --- | --- |
| Open | Entered/Open but not yet approved or assigned |
| Pending Internal Approval (SVAM/*Client)*, | CR pending internal review and approval |
| PM Approved | CR Approved by PM |
| Pending CCB Approval | CR pending CCB review and approval |
| CCB Approved | CR approved by CCB |
| CCB Rejected | CR rejected by CCB  |
| On Hold by CCB  | CR put on hold by CCB |
| Work in Progress | CR approved, assigned, and work is progressing |
| In Review | CR work is completed and in final review by PM prior the testing |
| Testing | CR work has been reviewed and is being tested |
| Closed | CR work is complete, has passed all tests, and updates have been released to UAT and then to Production. |

Table 24: Change Request Status Type

Once any change request is approved then all the impacted artifacts and deliverables are mentioned in the impact analysis document and implementation of those artifacts or deliverables are monitored as well by project manager.

The Change Log for this project is provided in [Appendix D](#_Appendix_F:_Change).

## Schedule Management Plan

[Example of schedule management approach: Establish a baseline within the first two weeks of the project and monitor progress against the baseline on a weekly basis. The Project Manager will be responsible for ensuring the project schedule is updated with the latest information and never more than three business days out of date.]

This section will describe how the project schedule will be established and managed, including how schedule changes will be determined, obtaining agreement on schedule changes, managing schedule changes, and measuring and reporting schedule performance.

The plan identifies the process and procedures used to manage the schedule during the course of the *<Project name>* Project. The plan defines who is responsible for tracking and reporting schedule progress, how schedule updates are received and incorporated, how variances and changes will be addressed, and how to baseline the schedule. The plan briefly describes the project’s schedule management tool.

### Roles and Responsibilities

Schedule-related responsibilities of team members and stakeholders involved in managing and controlling the project schedule are noted as follows:

| Team Member | Role | Responsibility |
| --- | --- | --- |
| *<Owner name>*  | Executive Sponsor | Will review and approve the final baseline schedule and only significant changes through the schedule change control process. |
| *<Owner name>*  | Business Sponsor | Will review and approve the final baseline schedule and only significant changes through the schedule change control process. |
| *<Owner name>*  | DSS PM | Will review and approve the final baseline schedule and only significant changes through the schedule change control process. |
| *<Owner name>*  | Project Manager | * Overall in charge of Schedule Management Plan
* Will oversee, provide input to the schedule (via the change control process) and review schedule status reports provided by the Project Lead.
* Will evaluate time-risk recommendations from the Project Lead to avoid schedule issues.
* Will lead the schedule management effort for application implementation and system testing
* Will review the internal MPP as per the timesheet filled by the project team to indicate the percentage completion of tasks. This activity will be done fortnightly
* Responsible to complete the Implementation and System Testing phase on the approved schedule (internal and *<Client name>*) unless deviation of schedule is approved by internal and *<Client name>* stakeholders
* Responsible to maintain the Project schedule in MS project (can use internal team members to update MPP) and share updated MPP with Engagement Director every 2 weeks. If there is any impact on the plan that is submitted to *<Client name>*) then the updated plan is released to *<Client name>*) after approved by Engagement Director
 |
| *<Owner name>*  | Project Manager | * Responsible to update the schedule for subsidiary plans in project milestone plan
* Will lead the schedule management effort for UAT, Training and Roll Out
* Overall responsibility for maintaining the external MPP (shared with client).
* Responsible to complete the project on the approved schedule unless deviation of schedule is approved by internal and *<Client name>* stakeholders
 |
| *<Owner name>*  | Quality Manager  | * Will update the MPP as per the timesheet filled by the project team to indicate the percentage completion of tasks. This activity will be done fortnightly
* Will periodically audit scheduling practices to validate compliance with this Schedule Management Plan.
 |
| *<Owner name>*  | Project Team | * Will fill the daily timesheet against the task assigned to them and provide the status of task completion on weekly basis.
 |

Table 25: Roles And Responsibilities

### Baseline Schedule

The baseline schedule is the first complete, agreed upon schedule approved for capture or copy for future reference. It is also the schedule from which future work will be measured. The frequency of re-establishing the schedule baseline for this project is only after an approved scope change. The first baseline will be created once the project plan is approved by *<Client name>*

The baseline will be re-established only upon scope change as approved by the project sponsor as described in roles and responsibilities section.

Major scope change or deliverables or major timeline change will change the baseline. Small CR’s or small slippages do not require new baseline. As a guideline, any change costing more than 5% of project budget or any schedule change more 90 calendar days will require re-baseline.

### Scheduling Development Tool

For this project schedule, data is consolidated and updated in Microsoft Project (MPP).

* Project schedule will be developed and defined in Microsoft Project. Against each work item, resource(s) will also be assigned in the Microsoft Project itself.
* IQMS will used by the project team for filling the timesheet
* MS PowerPoint will be used for creating project status report

### Schedule Management, Monitoring & Reporting

* Once the project schedule is finalized and baselined, Quality manager or appointee will create the timesheet item in IQMS for each team member based on the work item assigned in the Microsoft project.
* Team members will fill the daily timesheet in IQMS.
* Quality manager will take the weekly timesheet report from the IQMS and update the MPP to indicate the percentage completion of tasks
* Project manager will review the MPP to track the progress in terms of planned vs actual.
* If the tasks are not progressing as planned, project manager will initiate the corrective action.
	+ This might include adding additional resources.
	+ Discussion with team members
	+ Reassigning task to another team member
	+ Replacing underperforming team member
* Quality manager will do the monthly schedule audit and will notify the project manager to take the corrective actions.

#### Schedule Control

Schedule control begins when the project schedule is first baselined. Any proposed change to that scope will drive a schedule change management process that is described in next section. Changes happen if there is a change in requirements or the planned dates for tasks are not achievable.

As actual completion dates are monitored against the baseline, control tools and techniques are applied when to anticipate, avoid, and mitigate time loss as well take advantage of extra time due to early completions.

#### Schedule Control Techniques

Schedule control processes serve to minimize schedule changes. Control techniques are designed to reveal the status of the schedule and suggest corrective action to bring the project back on schedule. A technique like the Critical Path Method calculates theoretical early start and early finish dates by performing forward and backward pass analysis through the network version of the schedule enabling the Project Manager to assess schedule risk.

|  |  |
| --- | --- |
| Technique | Definition |
| Critical Path Method | Predicts project duration by analyzing the sequence of activities (network path) that has the least amount of scheduling flexibility (i.e. float). Early dates are calculated by a forward pass using a specified start date. Late dates are calculated by a backward pass starting from a specified completion dated (usually forward pass’s calculated early finish date for the project.) |

Table 26: Critical Path Method

Schedule Planning Analysis takes place early in the project when the WBS is formulated. The Project manager will use MS Project to run What-if Scenarios to align the project sponsors vision of the project with the likely timeframe for completion. What-if Scenarios will again be run when a new completion date must be determined as a result of a requested change to the WBS during the course of the project.

### Schedule Change Request Process & Reporting

The Project manager monitors the project schedule by reviewing and incorporating updates on a fortnightly basis. The Schedule Change Management Process is applied when:

* New tasks or deliverables cause **baselined milestones** to slip
* The project scope is changed
* A new constraint impacts the planned delivery date of the final project deliverable
* A key resource is redirected, and no backup is planned

Project Manager will share the updated MPP with percent-complete status of deliverables and tasks every fortnight.

The baseline will be re-established if there is a major change in scope or schedule based on the guidelines described above. New schedule must be approved by “Engagement Director” and project sponsor. After schedule is approved, updated plan is communicated to all relevant stockholders.

### Milestone Plan

The detailed milestone plan for this project has been created in Microsoft Project. The location of milestone plan is provided in [Appendix B](#_Appendix_B:_Project).

## Communications Management Plan

[Insert the project’s communication management plan or provide a reference to where it is stored.]

The purpose of the Communications Management Plan is to define the communication requirements for MPOS project and how information will be distributed to ensure project success.

This Communications Management Plan sets the communications framework for this project. It will serve as a guide for communications throughout the life of the project and will be updated as communication requirements change. This plan identifies and defines the roles of MPOS project team members as they pertain to communications. It also includes a communications matrix which maps the communication requirements of this project, and communication conduct for meetings and other forms of communication. Stakeholder register contains list of all project stakeholders with names, roles and contact details.

The Project Manager will take the lead role in ensuring effective communications on this project. The communications requirements are documented in the Communications Matrix below. The Communications Matrix will be used as the guide for what information to communicate, who is to do the communicating, when to communicate it, and to whom to communicate.

### Communication Matrix

[Insert the project’s communication matrix or provide a reference to where it is stored.]

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Communication Type | Description | Frequency & Format | Participants/ Distribution | Team Member | Role |
| Weekly Status Report | Summary of project status | Weekly by Email | Project Team and *<Client name>* Stakeholders | *<Owner name>*  | Project Manager |
| Weekly Project Team Meeting | Review Project status and issues | Weekly by Tele Conference | Project Team, and *<Client name>* Stakeholders | *<Owner name>*  | Project Manager |
| Project Monthly Review (PMR) | Present metrics and status  | Monthly by Tele Conference | *<Client name>* Stakeholders | *<Owner name>*  | Engagement Director / Project Manager |
| Weekly updates from DSS teams | Status update for Subsidiary plans | Weekly by Email | *<Client name>* Stakeholders | *<Owner name>*  | Project Manager |
| Fortnightly External MPP Update | Updated MPP | Fortnightly by Email | *<Client name>* Stakeholders | *<Owner name>*  | Project Manager |
| Fortnightly Internal MPP Update | Updated MPP | Fortnightly by Email | SVAM Management | *<Owner name>*  | Project Manager |
| Deliverable Sign Off from DSS | Email | As required by Email | *<Client name>* Stakeholders\* | *<Owner name>*  | Project Manager |
| Change Requests Update | Email | Weekly by Email | SVAM Management and Project Team | *<Owner name>*  | Project Manager |
| Risk Register Updates | Email | Weekly by Email | SVAM Management and Project Team | *<Owner name>*  | Project Manager |
| Invoicing to *<Invoicing Company name>* | Email | After deliverable sign off by *<Client name>* | *< Invoicing Company name >* | *<Owner name>*  | Engagement Director |
| Budget Update | MPP | Fortnightly | SVAM Management | *<Owner name>*  | Project Manager |
| Issue Log Update | Email | Weekly by Email | SVAM Management and Project Team | *<Owner name>*  | Project Manager |

Table 27: Communication Matrix

**Meetings**:

The Project Manager will share a meeting agenda at least 2 days in advance for all important meetings. Meeting minutes will be distributed no later than 24 hours after each meeting is completed or the by the end of next business day.

**Email**:

All email pertaining to the *<Client name>*Project should be professional, free of errors, and provide brief communication. Email should be distributed to the correct project participants in accordance with the communication matrix above based on its content. If the email is to bring an issue forward then it should discuss what the issue is, provide a brief background on the issue, and provide a recommendation to correct the issue. The email group clientemialid@abc.com should be included on any email pertaining to the *<Project name>*Project with *<Client name>*and SVAM’s PM and Engagement Director to be included in all internal SVAM emails. clientemialid@abc.com should be included on any email pertaining to the *<Project name>*Project with *<Client name>*and SVAM’s PM and Engagement Director to be included in all internal SVAM emails.

**Informal Communications**:

While informal communication is a part of every project and is necessary for successful project completion, any issues, concerns, or updates that arise from informal discussion between team members must be communicated to the Project Manager, so the appropriate action may be taken.

### <Client name> Escalation Matrix

| Level | Role | Responsible |
| --- | --- | --- |

|  |  |  |
| --- | --- | --- |
| Level1 | Engagement Director / *<Client name>*SPOC | *<Owner name>, <Owner name>* |
| Level 2 | *<Client name>*PM | *<Client name>* Contact person name |
| Level 3 | *<Client name>*Application delivery Head | *<Owner name>,*  |
| Level 4 | *<Client name>* Business Sponsor | *<Owner name>,*  |

Table 28: <Client name>, Escalation Matrix

### Status Meetings

Project Status meeting will be held every week starting from the requirements phase. The agenda of the meeting will be as below –

1. Project Status
2. Milestone achieved and next week’s plan
3. Issues
4. Risks & Mitigations

### Project Status Reports

Project Status report will be produced every week and shared with DSS stakeholders. The weekly status report will be stored in SharePoint as provided in [Appendix G](#_Appendix_G:_Status).

The status report will contain below sections –

1. Project Health
2. Risks
3. Issues
4. Milestones met & next week’s plan
5. Overall Project Comments

## Quality Management Plan

[Example: For an information system, controlling the consistency of screen layouts would include reviewing all screens to make sure they match the standards. Quality measures may be no bugs or defects for certain critical requirements, consistent screen layouts, or correctly calculating variables. Quality may be ensured through inspections, audits, formal testing and documentation of defects in a defect tracking system to ensure defects are fixed, retested and closed. Some projects may choose to use a traceability matrix to determine if critical requirements have been met.]

The Quality Management Plan documents the necessary information required to effectively manage project quality, from project planning to delivery. It defines *<Project name>*project’s quality policies, procedures, and roles, responsibilities. Its intended audience is the project manager, project team, and stakeholders whose support is needed to carry out the plan.

### Roles and Responsibilities

Project quality is the responsibility of every member of the project team. Below are the specific roles that have essential responsibilities as part of the project’s quality management effort.

| Team Member | Role | Quality Responsibility |
| --- | --- | --- |
| *<Owner name>* | Project Manager | * Overall responsible for Quality management plan
* Develop and track project metrics for application implementation and system testing phase
* Develop and maintain project management plans
* Monitor and control the system, load and performance testing
* Communicate project status, quality issues and risks to SVAM management
 |
| *<Owner name>* | Project Manager | * Develop and track project metrics for QA, UAT and Training phase
* Perform defect tracking and monitor bug fixes during QA and UAT phase
* Communicate project status, quality issues and risks to *<Client name>*stakeholders
* Serve as liaison for internal and external stakeholders for issues related to quality
 |
| *<Owner name>* | Quality Manager / Configuration Manager | * Quality Manager is responsible for managing the day-to-day quality management activities.
* Identifying and escalating any critical project issues to the Project Manager.
* Providing QA inputs for developing project work products.
* Providing oversight of *<Project name>*processes and procedures and providing evaluation reports related to standards compliance, process variances, and identifying process improvement opportunities.
* Auditing adherence to *<Project name>* standards on a periodic basis.
* Collecting and analyzing project metrics.
* Work with the Project manager and the Test Team to define and baseline all quality measures, metrics, and acceptance criteria in a Quality Management Repository.
* Support Requirements Traceability Planning.
 |
| *<Owner name>* | Test Lead | * Responsible for defining acceptance criteria, test plan, and for performing acceptance testing
* Responsible for performing Load and Performance testing
* Responsible for following testing standards
 |
| *<Owner name>* | Project Lead (PL) | * Work with the Project Manager, Quality Manager to keep them informed about quality related issues, quality management, system testing, system change requests, problem reporting and project requirements and definition.
 |

Table 29: Roles and Responsibilities

### Approach to Quality Management

Quality Management (QM) consists of two components, Process Quality and Product Quality. Process and Product Quality objectives will be achieved by an integrated quality program consisting of Define Quality, Measure Quality and Improve Quality.

The project defines quality by identifying and documenting quality criteria. The quality criteria consist of standards and metrics based on project requirements. The establishment of quality criteria will set quality expectations for project processes and products.

Process Quality focuses on the processes used to create the project deliverables. In this project, Process Quality also includes the project management plan. Process Quality ensures the project’s policies and procedures are being adhered to by project participants. Standards will include but not be limited to the following:

* Project Management Plan
* Design Standards
* Coding Standards
* Testing Standards

Product Quality focuses on the project deliverables. Product Quality ensures the deliverables are of acceptable quality and that they are complete and correct. The following is a list of product quality reviews:

* System Requirements Specifications Review
* Application Design Review
* Functional Audit
* Configuration Management Plan Review
* Code Review
* Test plan and Test Cases Review
	+ Regression Testing
	+ Smoke testing
	+ Load Testing
	+ Performance testing

### Quality Control Strategy

The below table lists Quality Control reviews, their frequency & responsibility

|  |  |  |  |
| --- | --- | --- | --- |
| **S. No.** | **Item** | **Frequency** | **Responsibility** |
| 1 | PMP review | When a new version is ready | PM, Engagement Director |
| 2 | MPP review | Fortnightly | PM, Engagement Director |
| 3 | Jira User Story Review | When a new version is ready | Project Lead, PM |
| 4 | Design Document Review | When a new Design is released | PL, Architect, PM |
| 5 | Code Review | Fortnightly | PL, Team members |
| 6 | Test Plan Review | When a new version is ready | Test Lead, PM |
| 7 | Test Cases Review | When a new version is ready | Test Lead, PM |
| 8 | RTM | When a new version is ready | Test Lead, PL, PM |
| 9 | Functional Testing | As per planned test iterations, during system testing | Tester, Test Lead |
| 10 | Integration/Validation Testing | As per planned Integration testing | Test Lead |
| 11 | Performance Testing | As per planned test iterations, during system testing  | Test Lead |
| 12 | Load Testing | As per planned test iterations, during system testing  | Test Lead |
| 13 | Risk Register Review | When a new version is ready | PL, PM, Engagement Director |
| 14 | Issue Log Review | When a new version is ready | PL, PM |

Table 30: Quality Control Reviews

**Software Quality Audit Activities**

|  |  |  |  |
| --- | --- | --- | --- |
| **S. No.** | **Item** | **Frequency** | **Responsibility** |
| 1 | Process Audit | Starting and end phase | Quality Manager |
| 2 | Configuration Audit | Starting and end phase | Configuration Manager |
| 3 | Product and Release Audit | Starting and end phase | Quality Manager |
| 4 | Security Audit | Starting and end phase | Quality Manager |

Table 31: Software Quality Audit Activities

### Project Metrics Reporting

The following metrics will be used for evaluating the project performance. The input for metrics will come from MPP. These metrics will be calculated and reported by the Project Manager on fortnightly basis.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Metrics** | **Data Source** | **Formula for Metric** | **Frequency****of the Data** | **Responsibility for data collection and analysis** |
| Defect Removal Effectiveness | Test Reports | (Internal QC Defects / (Internal + Customer Reported Defects)) \*100 | On Client Release | Test Manager |
| Cost Variance (CV) | MPP | BCWP-ACWP (BCWP - The BCWP (budgeted cost of work performed) fields contain the cumulative value of the task's, resource's, or assignment’s percent complete multiplied by the time phased baseline costs. BCWP is calculated up to the status date or today's date. This information is also known as earned valueACWP - The ACWP (actual cost of work performed) fields show costs incurred for work already done on a task, up to the project status date or today's date ) | Biweekly | Project Manager |
| BCWP(EV) | MPP | BCWP = Total Cost \* % completeThe BCWP (budgeted cost of work performed) fields contain the cumulative value of the task's, resource's, or assignment’s percent complete multiplied by the time phased baseline costs. BCWP is calculated up to the status date or today's date. This information is also known as earned value | Biweekly | Project Manager |

Table 32: Project Metrics Reporting

## Configuration Management Plan

The Configuration Management (CM) plan describes the methods, tools, roles and responsibilities of the Configuration Management environment. It also describes the process for CM administration, which includes configuration identification (i.e., naming standards, types of baselines, project inventory storage, and retention), configuration control (i.e., change requests, tracking and controlling changes), and configuration integrity (i.e., configuration status accounting and configuration audits).

### Configuration Management Resources and Responsibilities

The goals of a change control procedure usually include minimal disruption to services, reduction in back-out activities, and cost-effective utilization of resources involved in implementing changes.

| Team Member | Role | Responsibility |
| --- | --- | --- |
| *<Owner name>* | Engagement Director | Approve any changes to configuration items.  |
| *<Owner name>* | Project Manager | Overall responsible for Configuration Management PlanReview any changes to configuration itemsApprove any changes to configuration items. |
| *<Owner name>* | Project Manager | Approve any changes to configuration items.  |
| *<Owner name>* | Configuration Manager  | Perform/Review the changes to configuration items.  |
| *<Owner name>* | Project Lead | Perform the changes to configuration items. |
| *<Owner name>* | Test Lead | Perform the changes to configuration items. |

Table 33: Configuration Management Resources and Responsibilities

### Configuration Management activities

#### Change Control

The Project lead, PM, CM and Test Lead would be responsible for updating the code/document as required. PM and Engagement Director would be responsible for reviewing and approving the changes.

### Configuration Items

*<Hyperlink reference to below mentioned document>*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **CIs** | **Tool** | **Team Member** | **Approver** | **Location** |
| Source Code  | *<Git/TFS>* | *<Member name>* | *<Owner name>* | $\SVAM*\<Client Name><Project name>* |
| User Stories | *<Jira/TFS>* | *<Member name>* | *<Owner name>* | User Stories |
| Design Document | MS Word | *<Member name>* | *<Owner name>* | Design doc |
| Project Management Plan | MS Word | *<Member name>* | *<Owner name>* | Project Management Plan |
| RTM | MS Excel | *<Member name>* | *<Owner name>* | RTM Document |
| Test Plan | SharePoint | *<Member name>* | *<Owner name>* | Test Plan |
| Test Cases | MS Excel | *<Member name>* | *<Owner name>* | Test Cases |
| Project Schedule(MPP) | MS Project | *<Member name>* | *<Owner name>* | Project Schedule |
| Risk Register | MS Excel | *<Member name>* | *<Owner name>* | Risk Register |
| Issue Log | MS Excel | *<Member name>* | *<Owner name>* | Issue Log |
| Change Log | MS Excel | *<Member name>* | *<Owner name>* | Change Log |

Table 34: Configuration Items

### Baseline criterion

The baseline schedule is the first complete, agreed upon schedule approved for capture or copy for future reference. It is also the schedule from which future work will be measured. The frequency of re-establishing the schedule baseline for this project is only after an approved scope change.

The baseline will be re-established if there is a major scope change as approved by the project sponsor.

### Working Baselines

*<Git/TFS>* with Team Foundation Server will be used for daily maintenance and release of code for the *<Client name><Project name>* project.

All developers will have the latest version of the code from the Team Foundation Server that will be used in their local machines for the development. All the code developed by the user will be backed up daily into the Team Foundation Server to avoid any type of loss due to any hardware or software failure. The following structure will be used.

#### WIP (SVAM\ *<Client name>\<Project name>* \Work in Progress) Developer Branch

Developer will carry out their development on their local machine. Developers are required to get the latest code from the Team Foundation server in order to ensure the consistency of the development environment among the team. Developers can check out the relevant files and can work on that. Once developers are ready with their code, they can check in and it will be reflected in the repository. Another developer can take the latest code again if they need to. But everyday code check in is required by everyone by EOD. Code should not be sent in any other mode of communication like mail, social network etc.

#### Baseline Folder ($\SVAM\ *<Client name>\<Project name>* \Baseline) Master Branch

All the code for the build purpose will be maintained in the baseline folder. This will be the baseline code and the developer can get the latest working code from here. The code in this folder will be integrated by the respective team lead.

Developer can apply a label before requesting for the release for system testing by configuration manager.

For bug resolution, the developer will check out the related code from the TFS repository and will follow the same process as mentioned above for fixing the code in TFS followed by release for system testing. Testing team will be informed by email about the defect number fixed in the label supplied by configuration manager for testing.

#### Client Project Structure

Code will be released into another environment (QA, UAT) by the configuration manager on the request of Project lead or Project manager. The release notes (along with scope) for a certain build release need to be communicated to configuration manager along with the request.

Once the scope of any release/work package is finished, Team lead can request the configuration manager to release the code for tester to test in appropriate environment. Also, team lead is responsible to release the QA build to testing team with release notes.

#### Naming convention

1. The Naming convention for labeling project Code will be:

 Client Code\_Project Code\_RelaseNumber\_VersionNumber

 For ex- *<Client name\_Project name>***\_REL1\_V1.0**

1. The Naming convention for labeling apk/ipa will be:

 Client Code\_Project Code\_Flavor\_type\_VersionNumber

 For ex- *<Palmbay\_PriceManagement>***\_qa\_release\_1.0.apk**

1. The folder and subfolders for storing build will be:

 Client Code\_Project Code/Type/Flavor/build

 For ex- *<Palmbay\_PriceManagement>***/Dev/Release/test.zip**

### Storage and retrieval of CIs

The Access rights are given to all the team members for the respective code, documents and other CIs. The storage and retrieval would be done as per the access rights.

## Project Tailoring

Tailoring means adapting for a particular purpose. Tailoring is “For any given project, the project manager, in collaboration with the project team, is always responsible for determining which processes are appropriate, and the appropriate degree of rigor for each process.

*<Example: Consider configuration management as an example. Your organization shall expect all the project managers to ensure their team members check-in the code daily onto the local repository.*

*However, for a new project, the contract could be to check-in the code remotely at Client’s site and not locally. This means your Client has not approved to keep the code locally - no transmission of code howsoever. This could be for various reasons.*

*As a project manager, you would be tailoring the process for configuration management and update all the relevant registers like Risk, and Communication and ensure all the stakeholders are kept in the loop.>*

*<Tailoring example>*

* For CR’s greater than 6-man days size estimation will be done. For small CR’s experience based estimation is done and is updated in scope bank.
* PIN will not be created because project was already initiated by SVAM.
* User manual not required for the project.

## RACI Matrix

The RACI Matrix is a powerful tool to assist in the identification of roles and assigning of cross-functional responsibilities to a project deliverable or activity.

RACI represents: R - Responsibility, A - Accountable, C - Consulted, and I - Informed

**RACI Definitions:**

Responsibility = person or role responsible for ensuring that the item is completed

Accountable = person or role responsible for actually doing or completing the item

Consulted = person or role whose subject matter expertise is required to complete the item

Informed = person or role that needs to be kept informed of the status of item completion

## DAR

Decision analysis and resolution is used to analyze decisions using a formal, structured process to evaluate identified alternative solutions against established criteria. It identifies alternatives to issues that have a significant impact on meeting project objectives, analyzes the alternatives, and selects one or more alternatives that best support prescribed objectives

Typical criteria for triggering DAR include, but are not limited to:

* A specified program cost increase threshold
* Capital expenditures over a specified cost
* Make, buy, reuse decisions
* Significant architectural changes
* Significant schedule slip
* Deployment of a Major release
* Selection of third-party solution providers
* Selection of organizational tools
* Modification of organizational processes

# Glossary

## Acronyms and Abbreviations

| Acronym | Abbreviations |
| --- | --- |
| **EVM** | Earned Value Management |
| **PMP** | Project Management Plan |
| **PPA** | Project Process Agreement |
| **CM** | Configuration Management |
| **SPIP** | Software Process Improvement Plan |
| **WBS** | Work Breakdown Structure |

Table 35: Acronyms and Abbreviations

## Definitions

| Term | Definition |
| --- | --- |
| Work Breakdown Structure (WBS) | A deliverable-oriented grouping of project components that organizes and defines the total scope of the project; work not in the WBS is outside the scope of the project.  |
| Change Control Board | Team reviewing and approving the changes in scope |

Table 36: Definitions

# Appendix

*<Hyperlink reference to below mentioned Appendix>*

## Appendix A: Work Breakdown Structure

## Appendix B: Project Schedule

## Appendix C: Risk Register

## Appendix D: Issue Log

## Appendix E: [SVAM Jira](https://svaminc.atlassian.net/secure/RapidBoard.jspa?projectKey=MPOS&rapidView=3&view=planning)

## Appendix F: Change Log

## Appendix G: Status Report

## Appendix G: RACI Matrix

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