



Division of
Information Technology

Project Management Methodology



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INTRODUCTION

1. Overview

Texas A&M Division of Information Technology (Division of IT) established this methodology to meet the needs of the organization as they engage in information resource projects. It serves as a guide to the organization in project selection, to project teams in planning work, to management in providing oversight, and to sponsors and clients as they collaborate in the design and delivery of new business systems and services. This methodology is intended to facilitate compliance with state, system, and university regulations (e.g., TACs and SAPs). This methodology is consistent with the Project Management Institute's (PMI®) *A Guide to Project Management Body of Knowledge (PMBOK®)*, as well as the *Agile Alliance's Agile Manifesto* (where appropriate), while meeting the unique needs of project management in the Division of IT. It should apply equally well and meet the requirements of large and small projects.

This document describes in detail the process that the Division of IT intends to use during the initiating, planning, managing (controlling and executing), and closing stages of information resource projects. Texas A&M Division of IT staff can find a Project Management Toolkit on ITnet. Also, visit [Project Management Tools and Guides](#) for links to templates and how-to documents.

PHASE 1 – PROJECT INITIATION

The project selection process, when the project idea is defined, evaluated, and authorized, is carried out during initiation. Each line of business within the Division of IT is responsible for submitting proposed projects to the Executive Review Board (ERB). During the ERB meetings, each submitted project is reviewed on financial, strategic, and technological imperatives to determine which resources are needed and if the project is feasible given available resources. This process gives management and other stakeholders an opportunity to validate the project's potential benefits realization.

The amount of effort during project initiation depends in part on the size, complexity, and resources required for the proposed project. Generally, more information is needed to evaluate proposals for big projects that represent substantial investments than for smaller ones.

1. Governance Model

Governance at the Division of IT is facilitated at both the portfolio and project levels. The ERB is chaired by the Vice President and Chief Information Officer (or designee). It authorizes new projects and manages project priorities that affect the division and its clients. For active projects, it also provides a forum for any project changes, risks, or issues that require discussion and/or resolution by the ERB. The group meets bi-monthly. For more information, see [Appendix B, Project Portfolio Management](#).

2. Initiate Project Proposal

Project proposals are initiated using Laserfiche. Only submit proposals that meet these criteria:

- The [definition of an information resource project](#) is met.
 - Do not initiate for operational work or task level work.
 - Do not initiate for non-information resource projects. See [Exceptions and Exclusions](#).
- The project is for the Division of IT.
 - Do not initiate for work for external customers, e.g., non-Division of IT development work, or projects run by external entities, e.g., construction projects. See [Exceptions and Exclusions](#).

The requestor submits a proposal using one of the following Laserfiche forms:

- Project Proposal – use when proposing a project that is not covered by the business strategy proposal and does not require a financial impact analysis.
- Business Strategy Proposal – use when a project is needed in a proposal for adding, changing, or eliminating a product or service, changing an internal business practice, or realigning organizational structure. The business strategy proposal includes a question, “Is a project needed to implement this proposal?”

These Laserfiche forms include project complexity assessment questions that (1) determine if the proposed work is a major information resource project (MIRP), (2) determine if the proposed work is a project or a task, and (3) determine the project size.

See more information on completing the Project Proposal form and the Business Strategy Proposal form.

2. Approve the Project Proposal

After the requestor submits the proposal, it undergoes one of the following approval processes:



- Project Proposal Approval Process – The proposal is sent to the portfolio manager or designee for review. At the ERB meeting, the portfolio manager presents new project proposals and records approvals by the members.
- Business Strategy Proposal Approval Process

3. Add Project to the Project Portfolio

Once a proposal is approved, the portfolio manager creates a demand in ServiceNow, marks it as “Approved,” converts it to a project, and assigns it to the (TAMU) Division of IT portfolio and the appropriate program. Note: a project manager or [project coordinator](#) (PM/PC) must be assigned to the project.

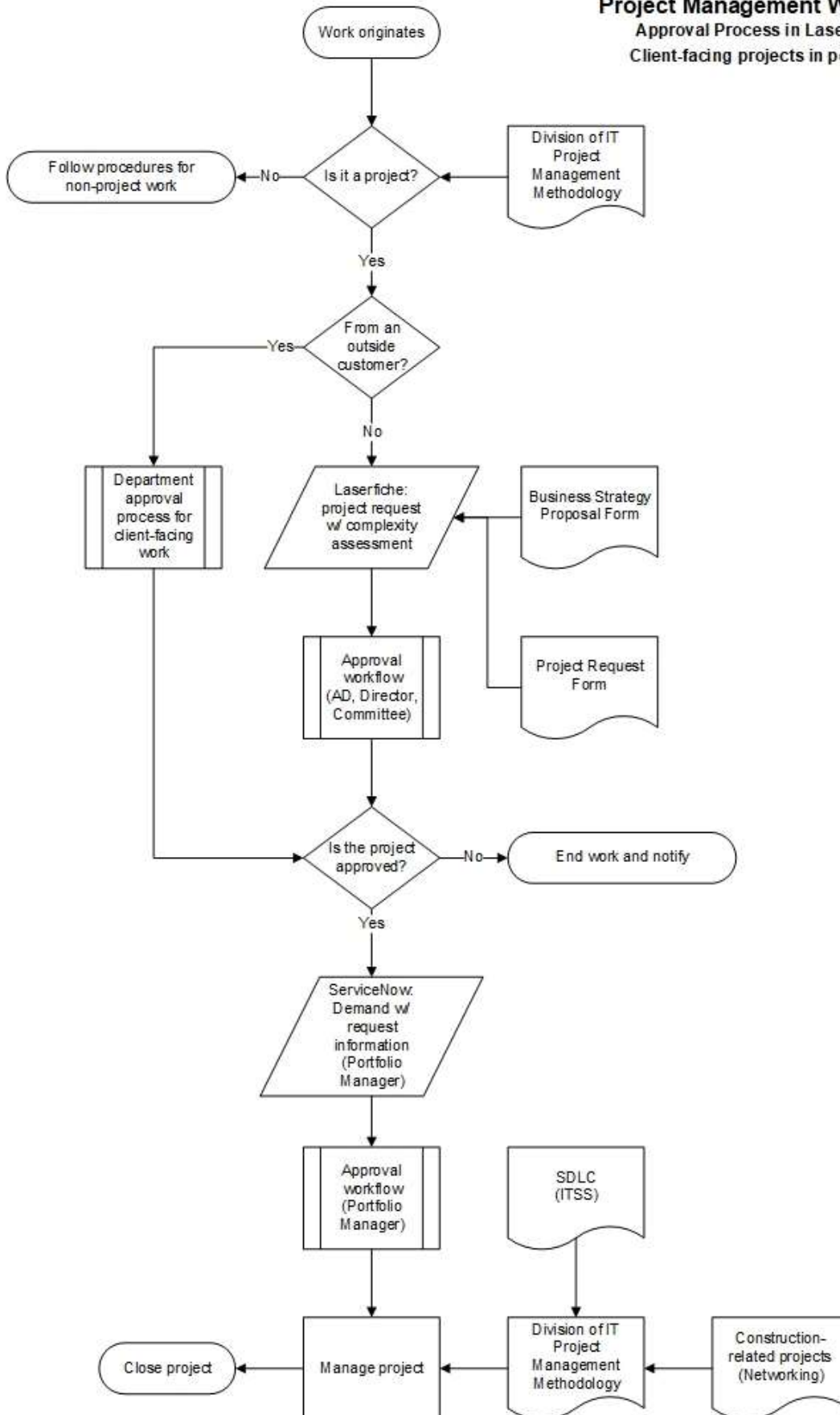
The portfolio manager informs the proposal submitter and the PM/PC of the ServiceNow project name and number.

4. Schedule the Kick-off Meeting (encouraged for Level 2 and required for Levels 3 and 4)

The PM/PC schedules the project kick-off meeting. Team members and other stakeholders should be invited. The scope should be discussed to ensure everyone understands the purpose and extent of the project. High-level milestones and time expectations should be set. A kick-off meeting presentation template is available in Microsoft PowerPoint format.



Project Management Workflow Approval Process in Laserfiche Client-facing projects in portfolio



PHASE 2 – PROJECT PLANNING

Project planning defines project activities and describes how the activities will be accomplished.

The Planning phase provides:

- More clearly defined project scope – such as a list of requirements
- Approval of scope by the project sponsor
- More precise schedule – including a list of milestones and delivery dates
- Named project team members
- Identification of other required resources

Project planning helps ensure a project's success by making sure all players know the project purpose and the extent of the workload and time expectations. Required documentation is based on the size and complexity of the project.

Level 1 and 2 Project Planning

1. Document Project Scope and Milestones (required for Levels 1 and 2)

The PM/PC documents the project scope (project description and/or a list of requirements) and milestones with delivery dates in ServiceNow. The project sponsor should approve the scope, which can be documented via email or a work note in the ServiceNow project. See Starting a Project.

2. Identify Project Team Members and Other Resources (encouraged for Levels 1 and 2)

The PM/PC documents the project team members in ServiceNow in the Team Management tab. See Adding Team Members.

a. Identify Other Resource Requirements

All project teams require tools to successfully perform the tasks assigned. The PM/PC should document the resources necessary to support the project.

3. Schedule Recurring Project Team Meetings (encouraged for Level 1 and required for Level 2)

Schedule the project team's status meeting on a regular frequency, such as weekly, bi-weekly, or monthly. Division of IT locations have conference rooms that can be scheduled through the email calendaring tool, and Zoom is available for remote meetings.

4. Create Status Reports (required for Levels 1 and 2)

The PM/PC creates project status reports in the ServiceNow Status Report tab. Report on the overall health of the project, schedule, cost, resources, and scope. Reports are required monthly for Levels 1 and 2. They should be submitted on the Monday before the Operational Leadership Team (OLT) meeting, which meets on the first Thursday of each month. See Entering a Status Report.

Level 3 and 4 Project Planning

1. Document Project Scope and Milestones (required for Levels 3 and 4)

The PM/PC documents the project scope (project description and list of requirements) and milestones with delivery dates in ServiceNow. The project sponsor should approve the scope, which can be documented via email or a work note in the ServiceNow project. See Starting a Project.

a. Develop a Project Charter (encouraged for Level 3 and required for Level 4)

The project charter provides the basis for future project decisions. A documented project charter is completed by the PM/PC after meeting with the sponsor, associate director (AD), and/or technical lead. The project charter template is available in Microsoft Word format. The project charter includes the following:

- **Project Purpose:** The statement of need/opportunity should explain, in business terms, how the proposed project addresses specific needs or opportunities, and how it provides benefits to the organization. Include how the project meets strategic plan objective or initiative.
- **Project Timeline:** Proposed start and end dates for project phases (e.g., initiation, planning, etc.) and other major milestones.
- **Project Deliverables** - The specific goals of the project. Project objectives, if properly defined and met, lead directly to accomplishment of the business objectives. While business objectives relate to the goals and objectives of the organization, project objectives relate specifically to the immediate goals of the project. For example, the project goal “implement a new time tracking system” has no value in and of itself. That goal only brings value to the organization when it leads to accomplishment of the business objective, “reduce costs and improve productivity through improved resource management.”
- **Project Value:** How the project reduces costs, drives efficiency, and/or adds value.
- **Estimated Work Effort:** List the time estimated to complete the project in hours or FTE percentages.
- **Approval by Sponsor and Key Stakeholders**

2. Create a Work Breakdown Structure (required for Level 4)

A work breakdown structure (WBS) is a visual representation of the work required to produce the project deliverables. The creation of a WBS is an effort to breakdown the deliverables into smaller manageable work packages. The work referred to in a WBS is not an activity, but the work products or deliverables from an activity or group of activities. The WBS created in the planning phase may be essential in scope management during the managing phase. WBS templates are available in Microsoft Project, Excel, Word, and Visio formats.

3. Identify Project Team Members and Other Resources (required for Levels 3 and 4)

During the initiation phase, the estimated team size needed was documented in the sizing/scoping document. During the planning phase, required skills are listed and specific resources are named for each required skill. Negotiation of time commitments may need to occur with respective managers. The outcome is the list of project team members. The PM/PC documents the project team members in the ServiceNow in the Team Management tab. See Adding Team Members.

b. Identify Other Resource Requirements

All project teams require the tools to successfully perform the tasks assigned. In scheduling resources, the PM/PC should ensure that both people and the equipment necessary to support those people are available.

4. Schedule Recurring Project Team Meetings (required for Levels 3 and 4)

Schedule the project team's status meeting on a regular frequency, such as weekly, bi-weekly, or monthly. Find a location that is conducive for the majority of the project team members or is close to the equipment/labs that may be needed. Division of IT locations have conference rooms that can be scheduled through the email calendaring tool, and Zoom is available for remote meetings.

5. Create Roles and Responsibilities (RACI) Documentation (required for Level 4)

A RACI matrix is developed to assign roles and responsibilities for project milestones, decisions, and tasks. RACI stands for Responsible, Accountable, Consulted, and Informed, which defines the level of responsibility assigned to the project team members and stakeholders. The RACI template is available in Microsoft Excel format.

6. Create Project Work Schedule (required for Levels 3 and 4)

The project schedule (or task list) provides the capability to track progress on the project and a mechanism to set expectations for what is expected from whom and by when.

ServiceNow is the official Project Portfolio Management tool of the Division of IT. It is where the list of authorized project list resides. For project tracking, ServiceNow provides multiple capabilities, including project scheduling, visual task boards, and notifications.

Each line of business may utilize project tools best suited for their area. Some tools used at the Division of IT for creating a project schedule include:

- Microsoft Project – provides the capability to include dependencies, to track the critical path, and to run various reports including major milestones and resource usage.
- Microsoft Excel or Microsoft Word tables – could be used for less complex projects.
- Google Apps – provides project tools that could be used.

a. Steps for Creating a Project Schedule

- i. Identify activities based on the project scope and deliverables.
 - Start with high-level milestones and break them down into manageable blocks of work.
 - Be sure to include tasks for the entire project, including requirements, design, implementation, transition management, testing, training, installation, maintenance, and others.
- ii. Estimate activity duration, work effort, and resource requirements.
 - Make sure smallest block of work can be done in a manageable amount of time.
 - Perform high-level resource work-load balancing to make sure everyone on the project has work and that no one is overloaded.
- iii. Determine any dependencies or relationships between tasks.

The Division of IT has managed some projects utilizing Agile or SCRUM methodologies. These projects also have a project schedule, but due to their more cyclical nature, they follow a sprint timeline. See [Scrum/Agile Project Management Methodology](#) for more information.

7. Create Stakeholder Analysis (encouraged for Level 4)

The stakeholder analysis involves identifying stakeholders and analyzing the stakeholders' impact or influence on the project throughout the project's lifecycle. A stakeholder analysis may be instrumental in creating a communication plan and developing your requirements documentation for the project. The stakeholder analysis template is available in Microsoft Word format.

8. Create Additional Requirements Documents (encouraged for Level 4)

Requirements are what the stakeholders need from a project. Requirements should focus on solving problems and achieving the project scope.

a. Create Requirements Management Plan (encouraged for Level 4)

The requirements management plan describes the processes that are used to define and document the stakeholder needs. It documents agreed-upon procedures for requirements definition, traceability, approval, and change. The requirements management plan template is available in Microsoft Word format.

b. Create Requirements Traceability Matrix (encouraged for Level 4)

The requirements traceability matrix helps link the requirements to the objectives and/or other requirements to ensure the project goals are accomplished. Defining the requirements during the planning phase helps manage the scope of the project during the managing phase. Types of requirements that may need to be collected include but are not limited to: business, functional, non-functional, quality, and transition. The PM/PC needs to decide on a technique(s) to collect requirements (i.e., facilitated workshops, interviews, focus groups (SMEs), surveys, group activities, prototypes, wireframes, benchmarking, and document analysis). The requirements traceability matrix template is available in Microsoft Excel format.

9. Create Risk Register (required for Levels 3 and 4)

A risk register is a log of events that could occur, including a probability and impact score, an owner, and a response. The Division of IT has configured ServiceNow to serve this function. For more information, see Project Risk Examples.

10. Create Project Communications Management Plan (required for Level 4)

Project communications planning involves defining the information needs of stakeholders and team members, as well as identifying which people need what information, when it is needed, and how they get it. Communication is the cornerstone of how work is performed by different parties within a project and is a critical component in the process. For complex or cross-divisional projects, a formalized external communication plan may be needed. On these projects, please coordinate with Product Strategy & Communications (PS&C). The communications plan template is available in Microsoft Excel format.

11. Create Training Plan (encouraged for Level 4)

During implementation of a project, user(s) may require training. Creating a training plan helps identify the audience(s), determine the trainer(s), cost of training, training scheduling, and delivery methods of the training. Training may be essential for project's implementation to be accepted by the user group. The training plan template is available in Microsoft Word format.

12. Create Status Report (required for Levels 3 and 4)

A project status report should be created through the ServiceNow Status Report tab. Report on the overall health of the project, schedule, cost, resources, and scope. Status reports are required bi-weekly for level 3 and weekly for level 4. See Entering a Status Report.

13. Create Other Project Documents

Meeting agendas, meeting minutes, issues log, decisions log, and project change log are vehicles for project information distribution. Setting up these documents is very important for more complex projects and cross-divisional projects. They are put in place during the planning phase and are used throughout the execution and the monitoring/control phases. These documents should be stored in the project folder in a collaborative space so that everyone has access to them, e.g., Google Drive, Sharepoint, S:/ Drive, etc.

a. Agenda for Meetings (required for Level 4)

Every formal meeting should have an agenda prepared and distributed to participants prior to the meeting. Depending on the attendees and size, this can be done via email. The meeting agenda template is available in Microsoft Word format.

b. Meeting Minutes (required for Levels 3 and 4)

Minutes of the meeting should be documented for all project meetings. These minutes can be captured in email, Word, Google Docs, or other means. These minutes provide an effective way for participants to know the status from each meeting. The minutes can be particularly beneficial to team members or management that were unable to attend the meeting. The meeting minutes template is available in Microsoft Word format.

c. Issues Log (encouraged for Level 3 and required for Level 4)

The issues log provides a mechanism for organizing, maintaining, and tracking the resolution of issues that cannot be resolved at the individual level. The issues log should include fields for documenting the issue, assessing the impact, making recommendations and determining the cost (people and assets), and time required for resolving the issue. The issues log template is available in Microsoft Excel format.

d. Decisions Log (encouraged for Level 3 and required for Level 4)

The decisions log documents all major decisions that are made on a project. On a large project, management and the team make many decisions. It is very important to keep track of everything that has been agreed upon. It should include, at minimum, description of the decision, what date the decision was made, who agreed to the decision, and why the decision was made. Decisions can be logged in the ServiceNow project in the Decisions tab. Also, a decision log template is available in Microsoft Excel format.



e. Project Change Log (encouraged for Level 3 and required for Level 4)

Project change control describes what happens when major changes occur or are being considered within a project. It determines how review and approvals are made, and how the project adapts to the change. The Project Change Log documents major changes to the project. The log should include documentation of requested change and determination of the impact to the project scope, timeline, resources, and/or budget. Project changes can be logged in the ServiceNow project in the Project Change Requests tab. See Entering a Project Change Request for more information.

f. Executive Status Report (encouraged for level 3 and required for Level 4)

An executive project status report provides management with an accurate assessment of the current project state. The report should provide information on the project description, project health, scope, and list project decisions, risks, and issues. The report may be created at least monthly for Level 3 project and should be created bi-weekly for Level 4 projects. The executive status report template is available in Microsoft Word format.

PHASE 3 – PROJECT MANAGING (EXECUTING AND CONTROLLING)

Once a project moves into the managing (executing and controlling) phase, the project manager's focus shifts to monitoring the work being performed. Managing the project plan ensures that planned project activities are carried out in an effective and efficient manner. A missed activity finish date may require adjustments to the entire project schedule, resource staffing, and other areas.

Level 1 and 2 Project Managing

1. Manage Scope

The PM/PC should document changes to the project scope, and the project sponsor should approve the scope change. The approval can be documented via email or a work note in the ServiceNow project.

2. Manage Schedule

The PM/PC should communicate schedule changes to the sponsor and the portfolio manager:

- a. At the monthly Operational Leadership Team (OLT) meeting, the Associate Directors are asked for status updates on projects that are due to be completed in the next 90 days.
- b. After the monthly OLT meeting, the portfolio manager emails the Division of IT about the status of the project portfolio, including revisions to project completion dates.

3. Manage Communications

The PM/PC should keep the team and stakeholders informed of project status:

- a. Hold regular team meetings.
 - o For Level 2 projects, the PM/PC should document meeting minutes. These minutes can be captured in email, Word, Google Docs, or other means. The meeting minutes template is available in Microsoft Word format.
- b. Generate monthly status reports. See Entering a Status Report.

Level 3 and 4 Project Managing

1. Manage Scope

Scope control aims to identify and manage all elements (e.g., people and requirements) of the project that increase or decrease the project scope beyond the original, agreed-upon scope statement.

Scope changes arise from the perceived need for a change in a project deliverable that may affect its functionality, and in most cases, the amount of work needed to perform the project. A scope change could require a change in resource time and/or project funding.

Scope change should be documented using the project change control process. See Entering a Project Change Request for more information. A scope change may cause changes to be made to other project documents such as the schedule/task list and budget. All scope changes must be communicated to the project team and stakeholders.

2. Manage Schedule

Schedule control allows the project team and stakeholders to know where the project stands with respect to its schedule (e.g., is the project ahead or behind schedule? What tasks need to be completed by what date?). The key to managing the schedule is obtaining statuses from the team members on a regular basis.

As part of the status collection, the PM/PC should confirm:

- Task start and end dates are still accurate.
- Task dependencies (or relationships) are still valid.
- Work effort (or task duration) is still valid.

Also, obtain accurate start and finish dates for completed tasks.

Schedule changes should be communicated to the sponsor. Furthermore, the sponsor needs to be made aware of what is being done to fix issues and the impacts on the project's performance and deliverables. It is a good practice for the PM/PC to hold regular project schedule reviews with the team and sponsor.

Note: It is standard practice to baseline the schedule at the start of the project. This allows all schedule changes to be displayed against the original project schedule. If schedule slippage becomes severe, it may be advisable to re-baseline the project. As this involves change to one of the project baselines, it should only be done through a formal project change control process.

3. Manage Issues

Everyone involved with or affected by the project should be provided a way to report issues or problems with the project. Issues are recorded in an issues log or in meeting minutes. All issues should be reviewed on a regular basis, e.g., in the project status meetings, since this group typically meet on a regular basis.

Typically, when the issue or problem has been resolved and verified, record the actual date the problem was resolved and the approval authority that closes the issue. Some issues may need executive management approval. The appropriate processes should be followed to update applicable contracts and baseline documents.

4. Manage Communications

The project communications plan is an important factor in the managing phase. A large part of a PM/PC's responsibility during this phase is keeping stakeholders informed of project status. Facets of project communications include the following examples:

- Hold regular team and/or status update meetings.
- Make meeting minutes available to stakeholders along with any action items, decision, and/or issues that may have been generated during the meetings.
- Generate status reports to the team and perhaps to executives on a regular basis.
- Make the project schedule and other project documentation available to the stakeholders.
- Stay in communication with the team on an informal basis. Informal discussion is sometimes the best way to determine team morale, true project status, looming difficulties, etc.

5. Manage Cost

Projects may fail to control costs or go over budget for many reasons. Often it is not a single problem, but a series of small problems that, combined, permit cost control to be sacrificed and prevent the project from being completed successfully. Project managers should monitor the costs. If costs increase, the project manager should search out the “why” and take appropriate action and inform the stakeholders of the authorized changes. Cost control is not simply a reporting process.

The Division of IT and each of its lines of business have a defined set of guidelines and policies that provide the infrastructure for project purchasing that should be integrated within the procurement plan. These guidelines outline the policy for solicitation, source selection, and contract administration. Although the solicitation and contracting responsibilities may not be managed by the PM/PC, it is still important that the PM/PC have a fundamental understanding of the division's contracting and procurement policies.

The PM/PC may be responsible for ensuring that the vendors, once contracted to do the work, meet the contractual agreements specified within their contracts. The PM/PC may also be responsible for tracking, reviewing and analyzing the performance of contractors on a project. This performance reporting may be the basis for any contractual changes that need to be made during the life of the contract. Finally, the PM/PC may play an important role in oversight and review of any contract changes that might affect the project.

6. Manage Risk

Risk identification, monitoring, and resolution are important tools for successfully completing a project. The risk register documents known risks and any responses for those risks. The risk register should be reviewed periodically in team meetings.

7. Manage Quality

Quality assurance incorporates a process of evaluating overall project performance on a regular basis to provide confidence that the project satisfies relevant quality standards. Quality control should be performed throughout the project. Project results include both product results, such as deliverables, and management results, such as cost and schedule performance. Quality control is often performed by user acceptance testing. Depending on the nature of the project, developing a test plan that includes test scripts, testing schedule, results verification, and testing signoff may be needed.

PHASE 4 – PROJECT CLOSURE

The last major stage of a project's life-cycle is project closure. Project closure occurs once all defined project tasks and milestones have been completed, and the sponsor accepts the project's deliverables.

Project closure may include the following:

- Verification of formal acceptance by the sponsor
- Re-distributing resources (staff, facilities, equipment, and automated systems)
- Closing any financial issues such as labor charge codes and contract closure
- Documenting the project successes, problems, and issues
- Documenting lessons learned
- Completing, collecting, and archiving project records.

These activities are particularly important on large projects with extensive records and resources.

Level 1 and 2 Project Closure

1. Archive Project Documentation

Closed project files are stored in Laserfiche in the PMO folder structure, which follows the standard university records retention guidelines. Please contact a Division of IT PM or the portfolio manager for assistance with archiving project documentation.

The following project information should be archived:

- ServiceNow project summary – right-click the grey header and select Export > PDF (Portrait)
- Meeting notes
- Correspondence

2. Document Lessons Learned (encouraged for Level 2)

Lessons learned can be logged in the ServiceNow project in the Lessons Learned tab. See Lessons Learned for more information.

Level 3 and 4 Project Closure

1. Prepare Project Closure Document (encouraged for Level 3 and required for Level 4)

The project closure document obtains verification and signoff from the sponsor that deliverables identified in the scope are completed. If for some reason a deliverable was not completed, this should be noted and the reason why this occurred. The project closure document is reviewed in the final project closure meeting. Also, during the meeting lessons learned are identified and documented. The project closure document template is available in Microsoft Word format.

2. Conduct Final Project Closure Meeting (encouraged for Level 3 and required for Level 4)

The issue of primary importance with project closure is the acceptance of the product or project deliverables by the customer for which they were created. The best way to ensure this is convening a final meeting with all necessary stakeholders to review the deliverables against the baseline requirements and specifications. Furthermore, any open action items or program level issues can be officially closed or reassigned to the support organization.

By drawing the stakeholders together in a single meeting, the PM/PC avoids clearing up open issues on an individual basis. The final deliverable of this meeting should be the project closure document created by the PM/PC describing the project's final deliverables in comparison with the authorized project baseline documents. Approval is verified via the signature of a project closure document by the stakeholders who signed the original project scope documentation. This document can be customized for the particular project to include pertinent deliverables, key features, and important information about final product delivery.

3. Document Lessons Learned (required for Levels 3 and 4)

Following a process for lessons learned, e.g., identify, document, validate, disseminate, and archive, promotes desirable project outcomes and minimizes the recurrence of undesirable project outcomes. Documenting and disseminating lessons learned bolsters continuous improvement through improved work processes, operations, and cost effectiveness. Lessons learned can be logged in the ServiceNow project in the Lessons Learned tab. See Lessons Learned for more information.

While formally conducted lessons learned sessions are part of project closure, some project teams choose to document lessons learned throughout the project's duration, while others wait for the lessons learned session at project closure.

A lessons learned session should include, at a minimum, the project team, key stakeholders, and any project support staff. This session can be combined with the final project closure meeting.

Examples of questions to cover during lessons learned sessions include:

- Did the project finish on time? If not, why?
- Was the customer satisfied with the end product?
- Were requirements and goals of the project met? If not, why?
- Did the project remain within budget? If not, why?
- Did the project management methodology work? If not, why?
- What could be done to improve the process?
- What roadblocks or challenges were experienced that impacted the project?



4. Archive Project Documentation (required for Levels 3 and 4)

Historical project data is an important source of information to help improve future projects. The specific information generated by a project varies; however, the following project data should be archived:

- ServiceNow project summary – right-click the grey header and select Export > PDF (Portrait)
- Meeting notes
- Correspondence
- Status reports
- Project closure document
- Technical documents
- Other documents/information

All closed project files are stored in Laserfiche in the PMO folder structure, which follows the standard university records retention guidelines. Please contact a Division of IT PM or the portfolio manager for assistance with archiving project documentation.

Many of the technical records and automated versions should be turned over to the Division of IT personnel responsible for maintenance and operation of the system. Summary technical information should be electronically stored for historical reference to facilitate later review.



PROJECT DOCUMENTATION BY LEVEL

Project Phase	Document	Type	Project Level			
			1	2	3	4
1-Initiate	Proposal Initiated	Laserfiche	X	X	X	X
	Project Initiated (Portfolio Manager)	ServiceNow	X	X	X	X
	Kickoff Meeting	Template		E	X	X
2-Plan	Project Charter	Template			E	X
	Scope					
	Project Description	ServiceNow	X	X	X	X
	Requirements	ServiceNow	E	E	X	X
	Scope Approval	ServiceNow	X	X	X	X
	Schedule					
	Milestones	ServiceNow	X	X	X	X
	Work Breakdown Structure	Template			E	X
	Task List	ServiceNow			X	X
	Resources					
	Team	ServiceNow	E	E	X	X
	Risk					
	Risk Register	ServiceNow			X	X
	Communications					
	Roles and Responsibilities (RACI)	Template			E	X
	Communication Plan	Template			E	X
	Stakeholder Analysis	Template			E	E
	Requirements Traceability Matrix	Template				E
3-Manage	Status Reports					
	Project Status Report / Update	ServiceNow	Monthly	Monthly	Bi-Weekly	Weekly
	Executive Status Report	Template			E (Monthly)	X (Bi-Weekly)
	Ongoing Communications					
	Meeting Notes / Minutes	Template		X	X	X
	Meeting Agenda	Template			E	X
	Decision Log	ServiceNow			E	X
	Issue Log	ServiceNow			E	X
	Project Change Log	ServiceNow			E	X
4-Close	Lessons Learned	ServiceNow		E	X	X
	Project Closure Document	Template			E	X
	Archive Project (Contact PMO)	Laserfiche	X	X	X	X

Key

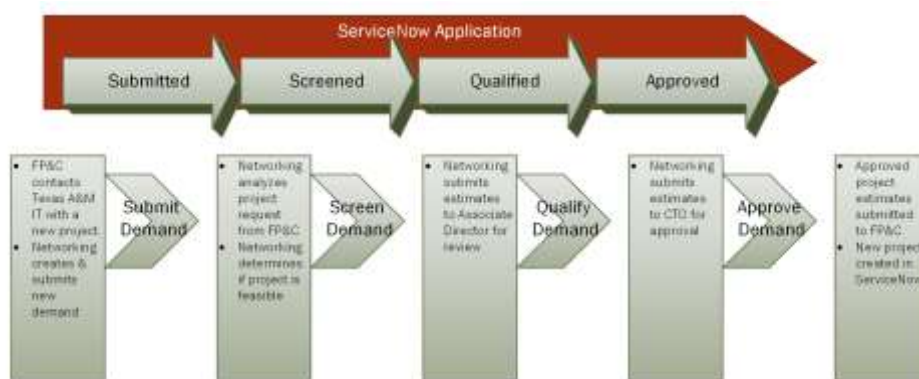
X = Required, E = Encouraged, (blank space) = Optional

EXCEPTIONS AND EXCLUSIONS

1. Construction Initiatives

Projects engaged in by the Division of IT, but managed via a third-party vendor (e.g., FP&C, SSC) for the purposes of campus construction are exempt from the methodology as written. In place of the full methodology, these initiatives are required to:

- a. Utilize a modified demand management process, visually depicted here, inclusive of formal approval of projects prior to the submission of bids and entering into of contracts.



- b. Utilize a custom charter template, specific to FP&C/SSC construction projects.
- c. Generate, at least monthly, a project status report as outlined within this methodology.
- d. Attach all project documentation into the ServiceNow PPM tool.

Specific Exclusions:

- a. Business Case, Risk Register, and Project Schedule are not required.
- b. Construction projects are not required to be reported as Major Information Resource Projects (MIRPs).

2. Information Resource Development Projects for External (non-Division of IT) Units

Information resource projects engaged in by the Division of IT for external (non-Division of IT) customers are exempt from the methodology as written. In place of the methodology, these initiatives are required to:

- a. Utilize the Software Development Lifecycle (SDLC) methodology.

3. Non-Information Resource Projects

Projects that do not involve IT services and/or do not impact division business processes or functions are exempt from the methodology as written. While these projects are encouraged to use this methodology, they are not required. Also, these projects are not tracked within the Division of IT project portfolio.

If a non-information resource project includes a deliverable that involves IT development or other IT services, that project is no longer exempt. For example, a communication project that includes website development is considered an information resource project and is required to use this methodology.



If a non-information resource project may result in major impacts to the division's business processes or other functions, the project is no longer exempt.

APPENDIX A

Definitions

Enterprise IT project portfolio

The enterprise IT project portfolio is the combination of all of a unit's project portfolios to provide an enterprise-wide view of all IT projects. This term does not mean only a portfolio of projects that impact or serve the whole enterprise.

Operational activity

Operational activity refers to ongoing and repetitive tasks whose purpose is to maintain existing systems.

Examples include but are not limited to incident tickets, requests for service, routine maintenance requests.

Project

A project is a temporary endeavor undertaken to create a unique product, service, or result. An information resource project is an effort to acquire or produce information and telecommunications technology systems and services.

A project has a start date, specific goals and conditions, defined responsibilities, budget, plan, fixed end date and multiple parties involved.

Examples include but are not limited to, developing a new product or service, developing or acquiring a new or modified information system, upgrade, or release. The project complexity questions in the Laserfiche project proposal forms provide guidance in determining if an endeavor is a project or a task.

Project Management Methodology (PMM)

The collection of processes, tools, templates and approaches intended to drive efficiency and consistent project delivery. It is designed to meet the needs of all segments of the organization as they engage in technical project work. It serves as a guide to the organization in project selection, to project teams in planning work, to management in providing oversight, and to sponsors and clients as they collaborate in the design and delivery of new business systems. It should apply equally well and meet the requirements of projects large and small.

Project Portfolio Management (PPM)

The coordinated management of the processes, methods, and technologies used by project managers and project management offices (PMOs) with the intent of enabling analysis and management of multiple concurrent proposals and initiatives. Objectives of PPM include realizing organizational strategic and operational goals through proposal approval, prioritization, standardization, efficiencies of scale and repetition, resource management, and financial management.

Portfolio Manager

The person responsible for the oversight of the project portfolio management process and methodology. Additionally, the portfolio manager analyzes the organization's projects to evaluate project status and execution to ensure each initiative is aligned with the expected benefits.

APPENDIX B

Project Portfolio Management

Portfolio Maintenance and Reporting

1. Each Associate Director names a project coordinator, who works with the portfolio manager to provide updates to projects.
2. The portfolio manager emails the liaisons one week before the Executive Review Board (ERB) meeting to request the following:
 - a. Submission of new projects (through Laserfiche)
 - b. Revisions to dates of existing projects
3. At the ERB meeting, the portfolio manager presents new project requests submitted through Laserfiche and records approvals by the members.
4. Projects approved by the ERB are entered into ServiceNow by the portfolio manager.
5. Project priorities are set in the ERB meeting to balance the portfolio.
6. The portfolio manager sends a reminder to the project coordinators to submit monthly updates by COB Monday before the Operational Leadership Team (OLT) meeting, which meets on the first Thursday of each month.
7. The portfolio manager runs the project status report on the Tuesday before the OLT meeting for all work-in-progress projects. The report contains project status, project end date, and the last monthly update.
8. At the monthly OLT meeting, the portfolio manager presents the project portfolio.
 - a. The Associate Directors are asked for status updates on projects that are due to be completed in the next 90 days.
9. After the monthly OLT meeting, the portfolio manager sends an email to the Division of IT about the status of the project portfolio:
 - a. Revisions of project completion dates
 - b. Current projects
 - c. Completed projects
 - d. Upcoming projects
10. Annually, the Associate Directors provide a list of proposed projects in their tactical plans.
11. The portfolio manager conducts an annual review of the project portfolio to ensure completed projects are closed, new projects are approved, and resources are distributed to manage all approved projects.

Monthly Status Reporting

All projects registered in the project portfolio must have project status information updated at least monthly. The PMs/PCs is responsible for posting project status information in ServiceNow and should review all project information to ensure accuracy. See Entering a Status Report for more information.

APPENDIX C

Project Coordinator Program

The project coordinator program (PC) supplements and enhances the Division of IT's ability to manage projects. It is dependent on functional, technical, and/or subject matter experts to engage in project management processes in addition to their normal work duties. This is compared to project managers (PM), whose primary role is to manage projects.

Definition

A PC is:

- Identified by an Associate Director,
- Reports into that AD's line of business (LOB),
- Familiar with project management practices,
- Responsible for reporting on project work.

The role and responsibilities of a PC are usually a subset of that of a PM. The primary responsibility of a PC is to maintain the project records and keep all related processes running smoothly.

Training

PCs have a variety of training tools to help facilitate and guide their project work.

- This guide – The purpose behind this methodology document is to provide high level support of the basic principles that should be applied at the Division of IT.
- Requests for edits, updates or additions should be forwarded to PMO@tamu.edu.
- In-person - The Division of IT will schedule training sessions to assist with project management practices, methodology questions, and tool (ServiceNow) usage. These in-person sessions will be scheduled in advance.
- Online - Several courses are available at no cost through Lynda.com:

Project Management Fundamentals	https://www.lynda.com/Project-tutorials/Project-Management-Fundamentals/424947-2.html
Agile Project Management	https://www.lynda.com/Business-Project-Management-tutorials/Agile-Project-Management/122428-2.html
Managing Technical Projects	https://www.lynda.com/Project-Management-tutorials/Managing-Technical-Projects/450184-2.html

Communications

PCs should engage in regular and periodic communication. At a minimum, the expectations for communications from PCs include:

- Communicate at least weekly to the project sponsor (Associate Director or other executive).
- Communicate at least monthly on the status of your project to the portfolio manager.
 - This can be accomplished through ServiceNow's functionality, detailed in Entering a Status Report.

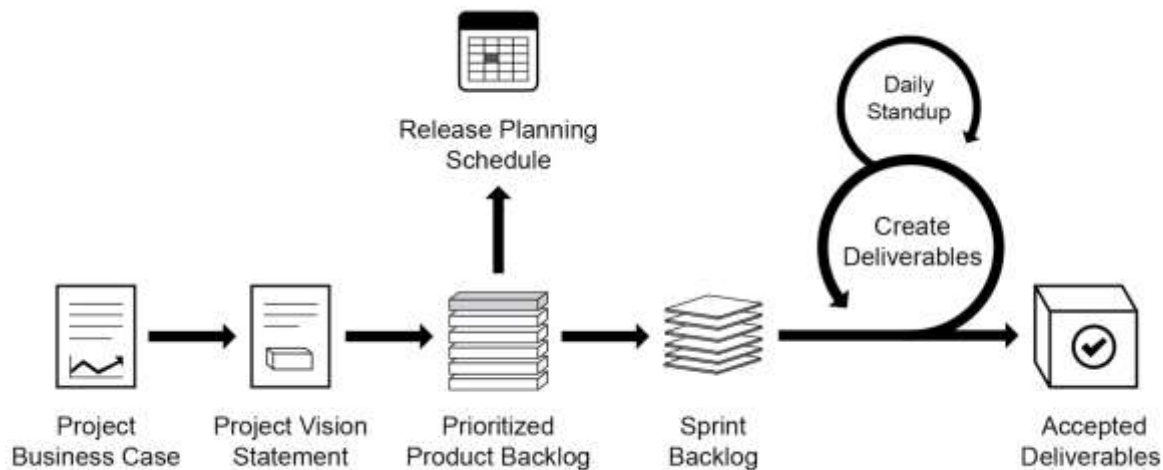
APPENDIX D

Scrum/Agile Project Management Methodology

In addition to the PMBOK Project Management Methodology, the Division of IT has also adopted the practice of SCRUM on certain projects. SCRUM is a framework that employs various processes and techniques. It is an interactive, incremental approach to optimize predictability and control risk.

To determine if a project should use the SCRUM Methodology, the following questions should be considered:

1. Will resources (IT and client) be committed to the project more than 50% of their time?
2. Can requirements and tasks be clearly defined and measured in specific intervals of one to two weeks?
3. Will the resources be co-located?
4. Will resources be able to make daily progress on a task?





Scrum Cheat Sheet by agile42

Product Owner

Owns the Product Backlog

The Product Owner represents the interests of everyone with a stake in the project (Stakeholder) and he is responsible for the final product.

- elicit product requirements
- manage the Product Backlog
- manage the release plan
- manage the Return on Investment

Scrum Master

Owns the Scrum process

The Scrum Master is responsible for the Scrum process. He ensures everybody plays by the rules. He also removes impediments for the Team. The Scrum Master is not part of the Team.

- manage the Scrum process
- remove impediments
- facilitate communication

Development Team

Owns the software

The team figures out how to turn the Product Backlog into an increment of functionality within a Sprint. Each team member is jointly responsible for the success of each iteration and of the project as a whole.

- software quality
- technical implementation of User Stories
- delivery of a "potentially shippable" product increment at every Sprint

Requirements

Make **SMART** Requirements: Simple, Measurable, Achievable, Realistic, Traceable.

User Stories

INVEST in User Stores: Independent, Negotiable, Valuable, Estimable, Small, Testable.

Tasks

Make sure a Task is **TECH**. Time boxed, Everybody (can pick it up), Complete and Human-readable.

Sprint Planning

Commit the deliverable(s) to the PO

Two part meeting. First, the PO presents the User Stories. Second, when the Team thinks they have enough Stories to start the Sprint, they begin breaking it down in Tasks to fill the Sprint Backlog (normally 3 to 4 days of work, than inspect & adapt).

Timebox: 4 hours

Owner: Product Owner

Participants: Team, Scrum Master

Daily Scrum

Inspect and Adapt the progress

In this standup meeting the Team daily inspects their progress in relation to the Planning by using the Burndown Chart, and makes adaptation as necessary.

Timebox: 15-20 minutes

Owner: Scrum Master

Participants: Team, all interested parties may silently attend.

Sprint Review

Demonstrate the achievements

The team demonstrate the PO the result - on the developed product - of the Sprint. The PO can accept or reject features depending on the agreed acceptance criteria.

Timebox: 4 hours

Owner: Team

Participants: Scrum Master, Product Owner, optionally the PO can invite other Stakeholders

Retrospective

Maintain the good, get rid of the bad

At the end of a Sprint, the Team evaluates the finished Sprint. They capture positive ways as a best practice, identify challenges and develop strategies for improvements.

Timebox: 3 hours

Owner: Scrum Master

Participants: Team, (Product Owner)

Product Backlog

Dynamic prioritized list of requirements

The requirements for the product are listed in the Product Backlog. It is an always changing, dynamically prioritized list of requirements ordered by Business Value. Requirements are broken down into User Stories by the PO.

Prioritize the requirements by playing the Business Value game. Buy these at www.agile42.com

Burndown Chart

Displays the remaining work

The Burndown chart shows the amount of work remaining per Sprint. It is a very useful way of visualizing the correlation between work remaining at any point in time and the progress of the Team(s).

Use a tool such as Agilo to automatically create the Burndown Chart. Learn more at www.agile42.com

Sprint Backlog

List of Tasks to fulfill the Sprint Goal

The Sprint Backlog contains all the committed User Stories for the current Sprint broken down into Tasks by the Team. All items on the Sprint Backlog should be developed, tested, documented and integrated in order to fulfill the Sprint Goal.

Estimate Story complexity by playing Planning Poker. Buy these at www.agile42.com

Potentially Shippable Product

Scrum requires at the end of each Sprint that the product is potential shippable to the customer. That means the increment is:

- thoroughly tested and stable
- well-structured
- well-written code
- user operation of the functionality is documented