

# OCIO Project Management Life Cycle Process

Phase	Discovery	Initiation	Planning	Execution & Control	Closing
Activities	<ul style="list-style-type: none"> <li>• Create project request</li> <li>• Use solution decision framework</li> <li>• Review and assign priority</li> <li>• Add project to Smartsheet and attach elevator pitch</li> <li>• Create business case</li> <li>• Initiate Service Management process checklist</li> <li>• Initiate Security Controls checklist</li> </ul>	<ul style="list-style-type: none"> <li>• Create charter</li> <li>• Create financials template</li> <li>• Update Smartsheet including elevator pitch</li> <li>• Update Smartsheet entry with ballpark estimates (include confidence level)</li> <li>• Conduct Security assessment</li> <li>• Conduct ADA assessment</li> </ul>	<ul style="list-style-type: none"> <li>• Create project plans</li> <li>• Determine work breakdown structure (WBS)</li> <li>• Create project schedule</li> <li>• Identify Resource assignments</li> <li>• Update Smartsheet entry with ballpark estimates (include confidence level); update elevator pitch</li> </ul>	<ul style="list-style-type: none"> <li>• See SDLC</li> </ul> <p><u>EXECUTING:</u></p> <ul style="list-style-type: none"> <li>• Work the schedule</li> <li>• Report project status via Smartsheet and refine elevator pitch</li> </ul> <p><u>CONTROLLING:</u></p> <ul style="list-style-type: none"> <li>• Document and track issues and risks</li> </ul>	<ul style="list-style-type: none"> <li>• Complete Warranty Plan (XX days of support)</li> <li>• Close out project and update Smartsheet</li> <li>• Hold Project Implementation Review (PIR) and document lessons learned</li> <li>• Celebrate success!</li> </ul>
Deliverables / Phase Gate	<ul style="list-style-type: none"> <li>• Project request created and prioritized</li> <li>• Decision on direction (build, buy, hybrid)</li> <li>• Business case approved by Senior Leader and Project Mgr.</li> <li>• Service Management Process Engagement Checklist Initiated</li> <li>• Information Security Controls checklist Initiated</li> </ul>	<ul style="list-style-type: none"> <li>• Project charter reviewed by OCIO and Enterprise Security Senior Leadership team</li> <li>• Project financials</li> <li>• Security approval</li> <li>• ADA approval</li> </ul>	<ul style="list-style-type: none"> <li>• Project plans (ex. communication plan, stabilization plan, training plan, etc.)</li> <li>• Project work breakdown structure</li> <li>• Project schedule</li> <li>• Resource assignments</li> </ul>	<ul style="list-style-type: none"> <li>• See SDLC</li> </ul> <ul style="list-style-type: none"> <li>• Project status reports</li> <li>• Continually updated project schedule</li> <li>• Documented issues and risks</li> </ul>	<ul style="list-style-type: none"> <li>• Warranty plan including RACI</li> <li>• Lessons learned report</li> <li>• Completed project close out checklist</li> </ul>
Tools & Templates	<ul style="list-style-type: none"> <li>• Smartsheet</li> <li>• Solution decision framework tree/matrix</li> <li>• Business case template</li> <li>• IT Service Management Process Engagement Checklist (link TBD)</li> <li>• &lt;Information Security Controls Checklist (link TBD)</li> </ul>	<ul style="list-style-type: none"> <li>• Project charter template</li> <li>• Financials template</li> <li>• Smartsheet</li> <li>• Security assessment template</li> <li>• ADA assessment template</li> </ul>	<ul style="list-style-type: none"> <li>• Project plan templates</li> <li>• Project work breakdown structure template</li> <li>• Project schedule template</li> </ul>	<ul style="list-style-type: none"> <li>• See SDLC</li> </ul> <ul style="list-style-type: none"> <li>• Project status report template(s) and Smartsheet</li> <li>• Issue / Risk log</li> </ul>	<ul style="list-style-type: none"> <li>• Warranty plan template</li> <li>• Lessons learned template</li> <li>• Project close out checklist</li> </ul>

# OCIO Software Development Life Cycle

Phase	Requirements	Design	Development	Testing	Implementation
Activities	<ul style="list-style-type: none"> <li>Document requirements</li> <li>Update project schedule</li> <li>Create test plan(s)/cases</li> </ul>	<ul style="list-style-type: none"> <li>Create design documents (ex configuration, integration, custom development, etc.)</li> <li>Create architectural designs</li> <li>Create object data models</li> <li>Engage Infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>Update previous artifacts (as needed)</li> <li>Build / configure solution</li> <li>Unit test</li> </ul>	<ul style="list-style-type: none"> <li>Execute test plan (ex. system, performance, user acceptance, etc.)</li> <li>Document results/outcomes</li> <li>Create implementation plan</li> <li>Record bugs (i.e. defects)</li> </ul>	<ul style="list-style-type: none"> <li>Deployment decision (Go/No Go)</li> <li>Finalize implementation plan</li> <li>Deploy to production</li> <li>Validate production launch</li> <li>Follow change management process (ITSM)</li> <li>Finalize training materials</li> <li>Finalize production support plan</li> </ul>
Deliverables / Phase Gate	<ul style="list-style-type: none"> <li>Approved Requirements</li> <li>Updated project schedule</li> <li>Revised project estimate (+/- 25%)</li> <li>Approved test plan(s)/cases</li> </ul>	<ul style="list-style-type: none"> <li>Approved design documents</li> <li>Architecture design</li> <li>Object data models</li> <li>Revised project schedule</li> <li>Project estimate (+/- 10%)</li> </ul>	<ul style="list-style-type: none"> <li>Updated artifacts</li> <li>Completed unit testing</li> </ul>	<ul style="list-style-type: none"> <li>Completed tests or approved exceptions (includes user acceptance testing approval)</li> <li>Testing bugs resolved or approved workarounds</li> </ul>	<ul style="list-style-type: none"> <li>Approved implementation plan</li> <li>Deliver training</li> <li>Production support plan</li> </ul>
Tools & Templates	<ul style="list-style-type: none"> <li>Requirements document template (i.e.; JIRA)</li> <li>Test plan/case template (i.e.; JIRA)</li> </ul>	<ul style="list-style-type: none"> <li>Design document templates</li> <li>Architecture design document template</li> <li>Data model template</li> </ul>	<ul style="list-style-type: none"> <li>Unit test template</li> </ul>	<ul style="list-style-type: none"> <li>Implementation plan template</li> <li>Bug Tracking (i.e.; Jira)</li> </ul>	<ul style="list-style-type: none"> <li>Service Now (Change Management Process)</li> <li>Production support plan</li> </ul>