<table>
<thead>
<tr>
<th>Activities</th>
<th>Deliverables / Phase Gate</th>
<th>Tools &amp; Templates</th>
</tr>
</thead>
</table>
| • Create project request  
• Use solution decision framework  
• Review and assign priority  
• Add project to Smartsheet and attach elevator pitch  
• Create business case  
• Initiate Service Management process checklist  
• Initiate Security Controls checklist  
• Project request created and prioritized  
• Decision on direction (build, buy, hybrid)  
• Business case approved by Senior Leader and Project Mgr.  
• Service Management Process Engagement Checklist Initiated  
• Information Security Controls checklist Initiated  
• Smartsheet  
• Solution decision framework tree/matrix  
• Business case template  
• IT Service Management Process Engagement Checklist (link TBD)  
• Information Security Controls Checklist (link TBD)  
• Project charter template  
• Financials template  
• Smartsheet  
• Security assessment template  
• ADA assessment template  | • Project charter reviewed by OCIO and Enterprise Security Senior Leadership team  
• Project financials  
• Security approval  
• ADA approval  
• Project charter template  
• Financials template  
• Smartsheet  
• Security assessment template  
• ADA assessment template  | • Project plan templates  
• Project plan templates  
• Project work breakdown structure template  
• Project schedule template  |
| | | • See SDLC |
| | | | EXECUTING:  
• Work the schedule  
• Report project status via Smartsheet and refine elevator pitch  
• Project plans (ex. communication plan, stabilization plan, training plan, etc.)  
• Project work breakdown structure  
• Project schedule  
• Resource assignments  
| | | CONTROLLING:  
• Document and track issues and risks  
• Project status reports  
• Continually updated project schedule  
• Documented issues and risks  
• Project status report template(s) and Smartsheet  
• Issue / Risk log  |
| | | • See SDLC |
| | | • Project status reports  
• Continually updated project schedule  
• Documented issues and risks  
• Project status report template(s) and Smartsheet  
• Issue / Risk log  | • Complete Warranty Plan (XX days of support)  
• Close out project and update Smartsheet  
• Hold Project Implementation Review (PIR) and document lessons learned  
• Warranty plan including RACI  
• Lessons learned template  
• Completed project close out checklist  |

**OCIO Project Management Life Cycle Process**

**Phase**
- Discovery  
- Initiation  
- Planning  
- Execution & Control  
- Closing  

**Activities**
- Create project request  
- Use solution decision framework  
- Review and assign priority  
- Add project to Smartsheet and attach elevator pitch  
- Create business case  
- Initiate Service Management process checklist  
- Initiate Security Controls checklist  
- Create charter  
- Create financials template  
- Update Smartsheet including elevator pitch  
- Update Smartsheet entry with ballpark estimates (include confidence level)  
- Conduct Security assessment  
- Conduct ADA assessment  
- Create project plans  
- Determine work breakdown structure (WBS)  
- Create project schedule  
- Identify Resource assignments  
- Update Smartsheet entry with ballpark estimates (include confidence level); update elevator pitch  
- See SDLC  
- Work the schedule  
- Report project status via Smartsheet and refine elevator pitch  

**Deliverables / Phase Gate**
- Project request created and prioritized  
- Decision on direction (build, buy, hybrid)  
- Business case approved by Senior Leader and Project Mgr.  
- Service Management Process Engagement Checklist Initiated  
- Information Security Controls checklist Initiated  
- Project charter reviewed by OCIO and Enterprise Security Senior Leadership team  
- Project financials  
- Security approval  
- ADA approval  
- Project charter template  
- Financials template  
- Smartsheet  
- Security assessment template  
- ADA assessment template  
- Project plans (ex. communication plan, stabilization plan, training plan, etc.)  
- Project work breakdown structure  
- Project schedule  
- Resource assignments  
- See SDLC  
- Project status reports  
- Continually updated project schedule  
- Documented issues and risks  

**Tools & Templates**
- Smartsheet  
- Solution decision framework tree/matrix  
- Business case template  
- IT Service Management Process Engagement Checklist (link TBD)  
- Information Security Controls Checklist (link TBD)  
- Project plan templates  
- Project work breakdown structure template  
- Project schedule template  
- See SDLC  
- Project status report template(s) and Smartsheet  
- Issue / Risk log  

**Closing**
- Complete Warranty Plan (XX days of support)  
- Close out project and update Smartsheet  
- Hold Project Implementation Review (PIR) and document lessons learned  
- Celebrate success!
## OCIO Software Development Life Cycle

<table>
<thead>
<tr>
<th>Phase</th>
<th>Requirements</th>
<th>Design</th>
<th>Development</th>
<th>Testing</th>
<th>Implementation</th>
</tr>
</thead>
</table>
| **Activities** | • Document requirements  
• Update project schedule  
• Create test plan(s)/cases | • Create design documents (ex. configuration, integration, custom development, etc.)  
• Create architectural designs  
• Create object data models  
• Engage Infrastructure | • Update previous artifacts (as needed)  
• Build / configure solution  
• Unit test | • Execute test plan (ex. system, performance, user acceptance, etc.)  
• Document results/outcomes  
• Create implementation plan  
• Record bugs (i.e. defects) | • Deployment decision (Go/No Go)  
• Finalize implementation plan  
• Deploy to production  
• Validate production launch  
• Follow change management process (ITSM)  
• Finalize training materials  
• Finalize production support plan |
| **Deliverables / Phase Gate** | • Approved Requirements  
• Updated project schedule  
• Revised project estimate (+/- 25%)  
• Approved test plan(s)/cases | • Approved design documents  
• Architecture design  
• Object data models  
• Revised project schedule  
• Project estimate (+/- 10%) | • Updated artifacts  
• Completed unit testing | • Completed tests or approved exceptions (includes user acceptance testing approval)  
• Testing bugs resolved or approved workarounds | • Approved implementation plan  
• Deliver training  
• Production support plan |
| **Tools & Templates** | • Requirements document template (i.e.; JIRA)  
• Test plan/case template (i.e.; JIRA) | • Design document templates  
• Architecture design document template  
• Data model template | • Unit test template | • Implementation plan template  
• Bug Tracking (i.e.; Jira) | • Service Now (Change Management Process)  
• Production support plan |