

Texas State University-San Marcos
Information Technology
Project Management Practices Component Mapping

Components of PMM/Practices	Component Definitions	Required Documents	Technology Resources' Application	Altek Library's Application	ITS-Academic Computing's Application	ITS-Classroom Technology's Application	ITS-Instructional Design's Application	ITS-Educational Technology Center's Application	Security's Application	
Task/Activity	Activities are defined as tasks that are routine or repetitive in nature; that may occur daily, weekly, monthly, quarterly, or annually; almost no risk; have a statement of need or routine request from end-users to align expectations. Tasks are typically technical in nature or walk-in services; to fix items reported as not working; or consultation and training; or to help end-users through a particular issue they are experiencing.	Work Plan	TR Director enters tasks and assignments in Project Professional and publishes to Project Server.	Activity Manager creates work plan/procedures, distributes to appropriate stakeholders, oversees implementation and assesses results (example: clean up activities, updates/upgrades). NOTE: For tasks/activities, the "work plan" consists of internally developed/established policies and procedures related to the work.	Individuals maintain their own task lists and report verbally on new tasks to supervisor. Future plans are for a trouble-ticket system to allow task tracking with assignment and escalations.	Tasks and assignments will be documented through Trouble Call Logs and Maintenance Logs.	Each designer develops their own work plan/task list.	Walk-in Service Request taking less than a week or so to do. Production request maintained in Filemaker Pro database.	Tasks or activities are recurring or take less than 20 hours to complete. They can be ongoing, routine, or one time activities such as firewall rule changes, monthly DIR reports, presenting semesterly security classes, regularly scheduled penetration tests and vulnerability scans, responding to reports of specific security incidents or user queries, etc...	
Projects		Requirements for "All Projects"								
All Projects	A Project is defined as a unique, one-time event that requires definition of both business and technical requirements, has a definite start and finish, and delivers a unique product or service.	Charter	Proposal/Charter developed during Initiation Phase by Users, Stakeholders, or TR staff (U/S/T) using TR Template; TR Director enters into EPM tool, attaches to EPM Proposal (Project Workspace) - A Proposal is an idea for which high level requirements, high level estimates of work and cost, and a communication plan is being defined. At this stage, it is not considered a project. The business requirements will assist in the determination of the classification of the project. Once the proposal is properly defined and documented, then it is available for prioritization and/or activated.	Executive sponsor and/or team leader drafts charge/charter and forms project team. The charge/charter will include the following: Project Description/Goal, Scope Definition, Project Team/Roles, Key Stakeholders and Org Groups Impacted, Desired Results/Deliverables, Resources Available, Constraints, Project Timeframe, Progress Report Schedule, Requirements (Business, Funding, Technical, Policy, Staffing, Communication, Training).	Proposal/Charter developed by Users, Stakeholders, or AC staff (U/S/T) using TR Template and creates a project website in an internal AC tracking website. A Proposal is an idea for which high level requirements, high level estimates of work and cost, and a communication plan is being defined. At this stage, it is not considered a project. The business requirements will assist in the determination of the classification of the project. Once the proposal is properly defined and documented, then it is available for prioritization.	Proposal/Charter developed by Stakeholders in conjunction with Classroom Technologies Staff. Charter document will be posted (use Project Documents Template - Room Diagram Document).	Proposal is submitted by stakeholders or ITS staff using ID Template. Hi-level requirements are clarified and defined and the proposal is accepted or rejected by the team taking on the work. If accepted, it is assigned to a project manager who creates a Project Charter and posts it for public display. A Design Overview describing similar projects under one umbrella (e.g., programmatic course development) is posted to the public server.	Projects use either one of three variations of project charter depending on the type of project: Ultra-Lite (Agile) and Lite use the "Project Skinny"; Full use the "Project Charter".	Project Charter is drafted by Security. Stakeholder input and participation is solicited.	
		Business Requirements (Level 1)	Discussed and developed during Initiation Phase by U/S/T group using TR Template; entered by TR Director to EPM Proposal Work Details; attached to Proposal (Project Workspace).	Included in charge/charter.	Discussed and developed by U/S/T group using TR Template; attached to tracking website.	Developed in conjunction with Classroom Technologies Staff; included in Project Documents (Room Diagram & Equipment List).	Discussed and developed by stakeholders and ITS team. High level requirements are included in the Charter.	High level statement of requirements, or statement of deliverable, whichever is appropriate, is contained within charter.	Discussed and developed by IT Security and a group of impacted stakeholders using TR Template(s), with results placed in the project workspace.	
		Hi-Level Estimates (Level 1)	Discussed and developed during Initiation Phase by U/S/T group using TR Template; entered by TR Director to EMP Proposal Work Details.	Included in charge/charter.	Discussed and developed by U/S/T group using TR Template; attached to tracking website.	Developed in conjunction with Classroom Technologies Staff; included in Project Documents (Estimate Page); includes equipment list and estimate.	Discussed and developed by stakeholders and ITS team. High level estimates are included in the Charter.	High level estimates contained within charter.	Discussed and developed by IT Security and a group of impacted stakeholders using TR Template(s), with results placed in the project workspace.	
		Communication Plan (Level 1)	Discussed and developed during Initiation Phase by U/S/T group using TR Template; attached to Proposal (Project Workspace).	Discussed, developed, implemented by team.	Discussed and developed by U/S/T group using TR Template; attached to tracking website.	Project Documents (Stakeholders) used for Communication Plan; including all major stakeholders.	Developed by project manager using ID template.	Use CommunicationPlan01.	Discussed and developed by IT Security and a group of impacted stakeholders using TR Template(s), with results placed in the project workspace.	
		Work Plan/Schedule	During Planning Phase, TR Director converts EPM Proposal created during Initiation Phase to MS Project Professional Work Plan. Enter tasks, estimates, dependencies, assigns tasks, and Base Line Work Plan.	Team develops tasks to be completed, by whom, timeline, etc.) The work plan will cover: Project Description; Planning; Team Communication; Testing/Assessment/Adjustment; Training; Implementation, Post-Assessment. It could also include an activity diagram if needed.	Project lead or Asst Dir creates work plan in a project diagramming tool (MS Project or other). Enter tasks, estimates, dependencies, assigns tasks, and Base Line Work Plan. Work plan is attached to tracking website.	Work Plan/Schedule dependent on several milestones (See Project Document Templates).	A high-level Schedule is included in the Charter. An overview of the multiple course development schedule is posted for public display. A Detailed Schedule and Work Plan are included in the Status Reports, which are not for public display.	Work plans developed in either MS Project, OmniPlan, or using the hosted ETC project site <i>Basecamp</i> .	Developed by IT Security with input from involved stakeholders as to tools, required level of detail, and progress tracking.	
		Close-Out Report	Post-implementation assessment discussed and developed during Closure Phase by U/S/T group using TR Template; attached to Project Workspace.	Team develops and submits final report including results, recommendations and/or assessment of project activities.	Post-implementation assessment discussed and developed by U/S/T group using TR Template; attached to Project Workspace.	Implementation Assessment discussed and developed; attached to Project Document at completion.	A close-out report using the ITS Template or an evaluation report (if the project is instructional in nature) is posted for public display.	All projects conduct a Project Critique or "lessons learned" at the conclusion of the project.	Discussed and developed by IT Security and a group of impacted stakeholders using TR Template(s), with results placed in the project workspace.	
Ultra-Lite Projects	Requirements in addition to all documents above									
	Ultra-Lite Projects are defined as low risk projects, which meet the following considerations: simple in nature, minor in impact and complexity (both business and technical requirements), limited in cost and work effort, limited requirements for communications; or require progressive development or are done in iterations with reoccurring planning and requirements phases; and meet the Classification Criteria specified by area for an Ultra Lite Project.	Business Requirements (Level 2)	Discussion and development during Planning Phase by U/S/T group, update TR Template; attached to Project Workspace.	Included in the above Charge/Charter.	Discussed and developed by U/S/T group using TR Template; attached to tracking website.	Same as in "All Projects".	Detailed Project Requirements are included in Status Reports and Strategies Matrices. Strategies Matrices are required for full instructional projects but optional for other projects. The Status Reports are emailed to the client and relevant ITS staff and posted to the ISD server. Neither of these documents are for public display.	Use Information in Project Skinny and updated with results from Project Roundtable. Project oversight is provided by the Project One-pager.	Use requirements documents from "All Projects" - no need for level 2 plan.	
	Communication Plan (Level 2)	Discussion and development during Planning Phase by U/S/T group using TR Template; attached to Project Workspace.	Same as above for "all projects".	Discussed and developed by U/S/T group using TR Template; attached to tracking website.	Same as in "All Projects".	Detailed communication plan is included in the Status Reports.	Use communication plan from "All Projects" - no need for level 2 plan.	Use communication plan from "All Projects" - no need for level 2 plan.		
Note: * Level 1 = High Level ** Level 2 = Detailed Level										
Lite Projects	Requirements in addition to all documents above									
	Lite Projects are defined as medium risk projects, which meet the following considerations: intermediate in nature, moderate in impact and complexity (both business and technical requirements), limited in cost, moderate work effort, moderate requirements for training and communications; or require utilization of Media Production Process and associated forms; and meet the Classification Criteria specified by area for a Lite Project.	Activity Diagram	Develop during Planning Phase using TR Template; attached to Proposal (Project Workspace).	Included in Work Plan as needed.	Develop using TR Template; attached to tracking website.	N/A	N/A	Required only for Full projects, optional for Ultra-Lite and Lite projects. Agile and Lite: contained in Project Skinny or produced as separate document; Full: contained in Project Plan.	Only used for Full projects.	
		Work Breakdown Structure (WBS)	Discussion and development during Planning Phase by U/S/T group using TR Template; attached to Project Workspace.	Included in Work Plan as needed.	Discussed and developed by U/S/T group using TR Template; attached to tracking website.	Discussed and developed by stakeholders and Classroom Technologies staff; included in Project Documents.	N/A	WBS is not required for most projects of this type. Included in the complete project plan as needed.	Use most appropriate tool for WBS (MS Project, Excel spreadsheet, product-specific guide, etc.). Place in project workspace.	
		Testing Plan	Develop & document as needed during Planning Phase, attached to Project Workspace. Updated as needed during Execution Phase.	Team develops, documents, and keeps with project files.	Develop & document as needed, attached to tracking website.	All projects are tested for signal flow prior to training and sign off.	QA checklist is developed by Project Manager and posted to ISD server - not for public display.	Utilize Beta-test form. Included in the complete project plan as needed.	Develop and document as needed and place in project workspace	
		Training Plan	Develop & document as needed during Planning Phase, attached to Project Workspace. Updated as needed during Execution Phase.	Team develops, documents, and keeps with project files.	Develop & document as needed, attached to tracking website.	Developed and documented as needed, attached to Project Document at conclusion of Project.	Instructor's Notes, if applicable, are developed by the Project Manager and posted to ISD server - not for public display. Required for full instructional projects; optional for other projects.	Document produced and included in the complete project plan as needed.	Develop and document as needed and place in project workspace.	
	Cost Estimate & Base Line, if applicable	TR Director enters estimates in MS Project Professional Work Plan and Base Line Plan; including Budget estimates and Base Line as needed.	Included in Charge/Charter as applicable.	Cost estimates outlined on tracking website.	All proposals to stakeholders come with a detailed cost estimate, prior to becoming accepted as Projects; included in Equipment List and Estimate.	N/A	Included in the complete project plan as needed utilizing Project Profile.	Develop and document as needed and place in project workspace.		
Full Projects	Requirements in addition to all documents above									
	Full Projects are defined as high risk projects, which meet the following considerations: large in nature, significant in impact and complexity (both business and technical requirements), involves new systems or new products and may involve supplier or consultants with the need to monitor cost expenditures, significant work effort, moderate to significant training, communications, and change management requirements; and meet the Classification Criteria specified by area for a Full Project. Projects costing over \$1,000,000 and duration over 1 year must also follow the Texas Project Delivery Framework.	RFI, RFO, RFQ, if applicable	TR Director works with TR Business Services and procurement department to complete documentation, typically during Initiation Phase as well as in Planning Phase.	If required or anticipated, team works with Business services and procurement department to complete documentation.	Asst Dir works with TR Business Services and procurement department to complete documentation.	Classroom Technologies Coordinator works with Procurement Department on all RFO's, RFI's, RFQ's.	N/A	Included in the complete project plan as needed.	Develop and document as needed and place in project workspace.	
		Vendor Statement of Work/Contract	TR Director works with TR Business Services and legal department to complete documentation, typically in Planning Phase.	If required or anticipated, team works with Business services and procurement department to complete documentation.	Asst Dir works with TR Business Services and procurement department to complete documentation.	Classroom Technologies Coordinator works with legal department if necessary for complete/accurate documentation.	Project Manager works with admin assistant to complete Vendor Statement of work, if applicable.	Included in the complete project plan as needed.	Develop and document as needed and place in project workspace.	
		Risk Assessment/Planning	Develop during Planning Phase using TR Guides/Templates, attached to Project Workspace. Updated as needed during Execution Phase.	Part of work plan developed by team, documented, and kept with project files.	Develop using AC Guides/Templates, attached to tracking website.	Developed as needed. Included in Project Document.	Included in Status Reports which are posted to the ISD server - not for public display.	Included in the complete project plan.	Develop and document as needed and place in project workspace.	
		Change Management Plan	Discussed and developed during Planning Phase by U/S/T group as needed, attached to Project Workspace. Updated as needed during Execution Phase.	Included in Work Plan and/or Training Plan and /or Communication Plan as appropriate.	Discussed and developed by U/S/T group as needed, attached to tracking website.	Discussed and developed by stakeholders and Classroom Technologies staff; included in Project Document.	N/A	Included in the complete project plan.	Develop and document as needed and place in project workspace.	
	Texas Project Delivery Framework Documents, if applicable	Discussed and developed during Planning Phase by Project Management group, which may or may not include Vendor Project Management.	Discussed and developed during Planning Phase by Project Management group, which may or may not include Vendor Project Management.	Discussed and developed during Planning Phase by Project Management group, which may or may not include Vendor Project Management.	Discussed and developed during Planning Phase by Project Management group, which may or may not include Vendor Project Management.	Discussed and developed during Planning Phase by Project Management group, which may or may not include Vendor Project Management.	Discussed and developed during Planning Phase by Project Management group, which may or may not include Vendor Project Management.	Discussed and developed during Planning Phase by Project Management group, which may or may not include Vendor Project Management.		