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|  |  | PMLCProject Management Life Cycle |

**The George Washington University**

**[Project Name]**

**Project Definition Document**

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| **Prepared By:** | [Name(s) of Preparer(s)] |
| **Version:** | [Version Number #.#] |
| **Date:**  | [Date] |
| **Project Owner:** | [Name & Title of Project Owner][Department] |
| **Project Manager:** | [Name of Project Manager][Department][Contact Information] |

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| **Status:** | **[x]  Draft** |
|  | **[ ]  Routing for Document Approval** |
|  | **[ ]  Approved** |
|  | **[ ]  Unapproved** |

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# Revision History

| **Version Number** | **Date**  | **Author** | **Notes** |
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\*Begin revision history after first, non-draft release.

Project Executive Summary

*<If required, summarize the project at a sufficient level to provide an Executive Summary for senior management review without having to review this entire document.>*

***Purpose / Instructions:*** *The purpose of this document is to document how the project will be organized, managed and executed. While some elements will be copied from the Project Charter, it is important that this document include all overview elements of the project and project management methodology. The sections in this document can be modified as necessary to fit each individual project. The instructions in this document are the italicized paragraphs and are meant to be deleted once they are no longer needed.*

# Introduction

*<Copy information from the charter and expand upon it where necessary and appropriate.>*

## Scope

*<Describe the overall goals, objectives and boundaries of the project by detailing the output expected after completion of the project.>*

## Objectives / Benefits

*<Describe the specific objectives and benefits of the project if not already captured in section 1.1.>*

## Exclusions

*<List the specific related items which will not be delivered as part of this project in order to clearly define that which is out of scope.>*

# Project Approach

This project will follow the Project Management Lifecycle (PMLC) and from this point forward will consist of the following phases; Plan (2.2), Development (2.3.1), Testing & Readiness (2.3.2), Deployment & Post Go‐Live (2. 3.3), and Closing (2.5). There are also activities which will occur throughout the project for Monitoring & Controlling (2.4) which are described in this section.

Details on the PMLC can be found in the *PMLC Toolkit eRoom* located here at the following URL: https://eroom.gwu.edu/eRoom/EVPT/PMToolkit. For access to this eRoom, or more information on the PMLC, please contact **<*Insert PM Name>*** at **<*Insert PM email address>*** and/or **<*Insert PM Phone #>***

## Define

*<Describe the process for defining the project (i.e. location of the project charter, process for completing this document, establishing/engaging the project team, determining methodology to be used [PMLC phases, SDLC, ILC, others]).>*

## Plan

### Planning, Analysis & Design

####  Planning

The majority of the activities in this phase will be led by the Project Manager, in collaboration with the project team. The planning activities for this project consist of the project team collaborating and completing the following tools:

##### 2.1.1.1 **Deliverables**

* Project Definition Document (PDD): Created to set forth the Project Management Plan (i.e. this document).
* Project Schedule Development: The Project Manager will work with the project team to create a detailed project schedule. This schedule will be the master schedule and will include detailed tasks for Planning, Development, Testing, Deployment and Closing. The Project Manager will own the maintenance of the overall project schedule.
* Communications Plan and Matrix: This document will lay out the plan to communicate with the Project Team, Executive Sponsors and the project owners. In addition it will lay out the communications which need to be disseminated to notify specific groups of the system changes to be implemented. This matrix will be stored and maintained in the eRoom referenced below:

***<Insert the project eRoom link where the Communication Matrix is located>***

#### Analysis & Design

This phase of the project will be led by the project technical lead and the requirements document will be used as the starting point for discussion. In a situation where the requirements document is not available, the team will develop the requirements based on information in the charter document. The following subsections describe the deliverables for this phase as well as the major activities.

##### **Deliverables**

* Architecture Diagram: A diagram of the environments, showing connectivity information will be produced and approved by a committee of representatives from IT Information Security and Compliance Services and Communications Engineering Services.
* Requirement Document: The requirement document will be developed if this is not prepared at the proposal stage.
* Specification Document: The team will work together to analyze the requirement and develop a specification document.
* Deployment Plan: The Project Manager will work with the project team to develop a plan to deploy the product of the project into the production environment with minimal disruption to the user community.

##### **Activities**

* Analysis: The team will identify aspects of the project which require further analysis and testing to determine if additional work will be required to support this project, Time for this analysis has been built into the schedule and timeline estimates. These activities will be tracked via the schedule described in Section 2.1.
* Design: The team will work together to design the solution and make recommendation on what is required to implement the solution.

####  Phase Gate Review

This phase will culminate in a Phase Gate Review where the Phase Gate reviewers will review the planning, analysis and design activities, validate the schedule and deliverables and approve entering the Execute/Development Phase.

## E**xecute**

### Development

The majority of the activities in this phase will be led by the either Division of Information Technology (IT) and/or the vendor, where a third party solution is to be implemented with support from the users where required and the Project Manager. The following subsections describe the deliverables for this phase as well as the major activities.

#### Deliverables

* Unit Testing, Functional Testing and User Acceptance Testing (UAT) Test plans.
* Test Plan & Procedures: The user will develop a plan for testing.
* Results of the Unit Testing and Functional Testing (where applicable)
* Deployment Plan: The Project Manager will work with the project team to develop a plan to deploy the changes into the production environment with minimal disruption to the user community.

#### Activities

* Network Configuration & Environment Setup: The team will work together to configure the network and the development/test environments to enable analysis and development to be performed. These activities will be tracked via the schedule described in Section 2.1.
* IT Development: IT will identify modifications/development which are required to support this project and will perform this development during this phase. Test Plan & Procedures: The team members that will be required to test will develop a plan for testing as well as documented procedures to lead UAT testing, and enable traceability, tracking and resolution of issues discovered during testing
* Testing: Unit testing and Functional testing will be conducted in this phase.

#### Phase Gate Review

This phase will culminate in a Phase Gate Review where the Phase Gate Reviewers will review the development activities, validate the deliverables, verify testing preparedness and approve entering the Testing & Readiness Phase.

### Testing & Readiness

The majority of activities in this phase will be led by the users who will manage execution of the UAT test plan and gather test results.

#### Deliverables

* Test Results: Results from the users End‐to‐End Testing and UAT in sufficient detail to enable a Go – No - Go decision by the Executive Sponsors.
* Deployment Plan (Validated): A validation of the deployment plan developed in the previous phase to ensure all proper planning is completed prior to deployment of the solution into production.

#### Activities

* UAT is performed.
* Issues from UAT are reported.
* Issues from UAT are resolved.
* Re-testing is of the resolved issues is done.

### Deployment / Post Go-Live

*<Briefly discuss the methodology and documentation to be included for this specific project, potentially including the Implementation Plan.>*

## Monitor & Control

*<Describe the activities and artifacts which will be used by the Project Team to control the project.>*

### Documentation Management

* eRoom: Documents will be managed and stored in the project eRoom (***Insert the Project eRoom link here)***
* RACI (Responsible, Approve, Consult, Inform) Matrix: Will be used to describe each of the artifacts, including related project team roles.

### Change Management

* Change Management Process: Any changes requested which may impact Schedule, Scope or Resources of this project will follow the standard IT Change Management Process which can be accessed through the eRoom referenced in section 2.4.1 and is located in the *Project Management ‐> Change Management* folder.
* Change Request Form: In order to initiate the Change Management Process described above, the requestor should complete a Change Request Form, which can be accessed through the eRoom referenced in section 2.4.1 and is located in the *Project Management ‐> Change Management* folder. This form should then be sent to the Project Manager.
* Change Control Board: The following group comprises the Change Control Board and will approve any changes submitted through the Change Management Process which will impact project scope, schedule or resource needs.

The purpose of the Change Control Board is to help control change within the project. The board consists of representatives from departments with a significant vested interest in this project. The representatives on this board should always have decision making authority.

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### Communication Management:

Key project communications points will be tracked through the Communications Matrix which is located. This is a living matrix which can and will be updated as the project progresses.

### Action & Issue Management

Project Actions and Issues will be tracked and managed through the PPM. The report from PPM will be reviewed regularly at project team meetings and should be used by project team members to keep track of their own responsible actions and issues.

### Risk Management

Project Risks will be tracked and managed through the PPM. This will be reviewed at intervals by the project team and leadership.

### Gate Review Process

From this point forward, this project will have Phase Gate Reviews at the end of the Planning, Analysis & Design (2.2.1), Development (2.3.1), Testing & Readiness (2.3.2), and Closing (2.5) phases. The Deployment / Post‐Go Live Phase (2.4) will not have a Phase Gate Review at the end due to the short duration of the phase.

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| **[Project] Gate Review Board** |
| **Name** | **Office / Department** |
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### Governance

*<List any additional governing committees, such as steering or advisory committees, who will provide oversight or guidance for the project.>*

#### Project Escalation Procedure

The project team will work diligently to resolve all issues at the project team level. However, there may be a point at which an issue must be escalated in order to be resolved. This project will escalate all issues transparently and through the following process:

1. When an issue cannot be resolved by the project team, the issue shall be raised by the Project Manager to the Project Owner and Key Stakeholders listed below:

2. If resolved, the Project Manager will document the resolution as minutes and store these in the eRoom listed in section 2.6.1.

3. If the issue is unable to be resolved by this group, the issue will be raised by the Project Manager to the Executive Sponsors listed below:

## Close-Out

*<Describe the process to be used for Lessons Learned and Project Transition to operational teams. List any documentation to be used including links to the intended storage location, including the Lessons Learned and Project Transition documents. Provide a link to the Lessons Learned process or detail that process in this section.>*

# Project Milestones

## High-Level Project Timeline (pre-detailed schedule development)

*<Include a diagram showing the high-level project timeline. If unchanged from project charter, paste that timeline here.>*

## High-Level Project Milestones

*<List the high-level milestones and the expected due dates. This is merely a preliminary view of the overall milestones. These will be revised as necessary, within the time constraints dictated by the project charter, as the schedule is developed.>*

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| --- | --- | --- | --- |
| **Milestone & Major Activities** | **Expected Date** | **Notes** | **Phase** |
| Planning |  |  | Planning, Analysis & Design |
| Analysis & Design |  |  |
| Planning, Analysis & Design Gate Review |  |  |
| Development |  |  | Development |
|  |  |  |
| Development Gate Review |  |  |
|  |  |  | Testing & Readiness |
|  |  |  |
| Testing & Readiness Gate Review |  |  |
|  |  |  | Deployment/Cutover |
|  |  |  |
|  |  |  |
| Lessons Learned |  |  | Closing |
| Archive Project Documents |  |  |
| Closing Phase Gate Review |  |  |

# Assumptions, Dependencies, Constraints

## Assumptions

*<List the major assumptions from the project charter, or from subsequent discussions, which if changed will impact the successful delivery of this project.>*

## Dependencies

*<List the major dependencies which impact the ability to successfully complete this project.>*

## Constraints

*<List the major known constraints affecting scope, schedule, resources or cost within which this project will be expected to be executed (i.e. a fixed deadline for delivery, limited resources, etc.).>*

# Roles & Responsibilities

## Project Organization Chart



## Project Team & Role Description

*<Describe team members and their roles. If you have a RACI (Responsible, Approver, Consult/Support, Inform) matrix for the project, refer to the location of that matrix in this section or refer to section 2.4.1 of this document if the RACI matrix was covered in that section.>*

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| **Name** | **Role** | **Responsibility** |
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## Participating Departments/Third Parties

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| --- | --- | --- |
| **Department / Third Party** | **Responsibility** | **Resource(s)** |
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# Approval

By signing, the individuals listed below have approved this Project Definition Document.

|  |  |  |
| --- | --- | --- |
| Name:  |  | Name:  |
| Title: |  | Title: |
| Role: Manager, Functional Resources |  | Role: Manager, Technical Resources |
| Date: |  | Date: |
|  |
| Name:  |  | Name:  |
| Title: |  | Title: |
| Role: Manager, Functional Resources |  | Role: Manager, Technical Resources |
| Date |  | Date |
|  |

*<For an approval received via electronic means, such as email, please indicate by placing “Electronic Approval” on the approval line. Please then place a copy of the electronic approval in the same project file folder where the approved version of this document is stored.>*

# Appendix A – Related Documents

*<Link or referenced location of the Project Charter, Project Definition Document, Business Requirements, Project Schedule, Requirements Traceability Matrix and any other related documentation.>*

| **File Name** | **Document Owner** | **Document Location or Link** |
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# Appendix B – Glossary

*<List any acronyms or terms which were used in the document and their meaning / definition.>*

| **Term / Acronym** | **Definition** |
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