

COMPANY NAME

Project Documentation Checklist

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Revision History

Document Version	Revision Date	Originator	Revision Description
1.0	xx-xx-20xx	Flo Samuels	Initial Release.
1.1	xx-xx-20xx	Flo Samuels	Reasons for revisions
1.2	xx-xx-20xx	Flo Samuels	Reasons for revisions
1.3	xx-xx-20xx	Flo Samuels	Reasons for revisions
1.4	xx-xx-20xx	Flo Samuels	Reasons for revisions

COMPANY NAME

Project Documentation Checklist

Product/Project/Development Managers: Use this Checklist to ensure all project management related activities are completed during the software development lifecycle. The Date column is optional as these activities should be in the MS Project Schedule.

Initiation and Feasibility Study

Date	Step	Sub-Step	Primary Role	Additional Roles	Activity
	1		Product Manager		Product Manager/Marketing notified of new service or major enhancement request through MRD, or other means.
	2		Product Manager		Contacts Development Manager or designee to determine server location for proposed project documents.
	3		Product Manager		Uses MS Project Plan Procedure and MS Project Central Procedure in <i>server/projectA/CMM/Proj Planning/Documents</i> to start MS Project Schedule to capture effort. Uses ProdMgt.mpt in <i>server/projectA/CMM/Proj Planning/MS Project Templates/</i>
		3a	Product Manager		Add activities, as needed, to capture time expended for Feasibility study.
		3b	Product Manager		Add resources to Feasibility tasks; assign through Project Central.
		3c	Product Manager		During Feasibility study, update schedule weekly with hours from feasibility study team.
	4		Product Manager		At end of Feasibility study, completes Stage End Summary Report , in <i>server/projectA/CMM/Proj Tracking/Documents/</i> .
	5		Product Manager	SCM	If project is not funded, stop here. Request SCM group archive documents.

Project Documentation Checklist

Requirements (Feasibility study supports project funding)

Note: All documentation is stored in Requirements software system or Configuration Management software system.

Date	Step	Sub-Step	Primary Role	Additional Role	Activity
	1		Product Manager		Notifies QS, Development, Tech Pubs, and IT Managers of project funding (save e-mail to <i>_RM directory</i>). Updates MS Project Plan by adding Requirements activities, resources, and estimates. Statuses plan weekly with hours from Project Central.
	2		QA	Develop. Manager	Start project plans, using MS Project Plan Procedure and MS Project Central Procedure in <i>server/projectA/CMM/Proj Planning/Documents</i> . QS uses QS.mpt in <i>server/projectA/CMM/Proj Planning/MS Project Templates/</i> and Development uses Devel.mpt in <i>server/projectA/CMM/Proj Planning/MS Project Templates/</i>
	3		Product or Develop. Manager		Creates Master Plan for project and links to individual group plans (Product Management, QS, Development) per MS Project Plan Procedure.
	4		Product Manager	Develop. Manager, QA/SCM	Concurrently,
		4a	Product Manager		Develops Scope using Scope Template in <i>server/projectA/CMM/Req Mgt/Documents/</i>
		4b	Product Manager		Develops Requirements Overview using Requirements Overview Template in <i>server/projectA/CMM/Req Mgt/Documents/</i>
		4c	Product Manager		Creates Use Cases using Use Case Template in <i>server/projectA/CMM/Req Mgt/Documents/</i> .
		4d	Develop. Manager		Reviews Use Cases as they are developed.
		4e	Product Manager	Develop. Manager, QA/SCM	If <u>no</u> system Quality Plan and/or SCM Plan exists, uses templates to start plans and complete Product Manager sections, then forwards to Development Manager, QA and SCM to complete their sections. Templates are in <i>server/projectA/CMM/[SQA or SCM]/Documents/</i> . (Note, large systems will have plans at a major component level, such as <i>/Calc, /Gui, and /Utilities+Tools.</i>)

Project Documentation Checklist

Date	Step	Sub-Step	Primary Role	Additional Role	Activity
		4f	Product Manager	Develop. Manager, QA/SCM	If a system Quality Plan and/or SCM Plan exists, Product and Development Managers , then QA and SCM update plans to include new project. Plans are in <i>server/projectA/system_plans/[system name]/</i> .
	5		Product Manager	SCM	Requests SCM to set up project directories in Configuration Management software system, per SCM Plan.
	6		SCM		Sets up project directories, sets up views for Product and Development Managers.
	7		QA		Sets up project in change tracking system to record inspection defects.
	8		Product Manager	Develop. Manager, QA	If project is active (starts within three months), notifies QA and Develop. Manager of inspection meeting, sign-off on Use Cases using Use Case Checklist in <i>server/projectA/CMM/Checklists/</i> .
	9		Product Manager		Obtains approval and sign-off of Use Cases from Customers.
	10		Product Manager		Obtains approval and sign-off of Use Cases from Development team.
	11		Product Manager	Develop. Manager	Concurrently,
		11a	Product Manager		Develops Requirements from Use Cases using the Requirements Template in requirements tracking system.
		11b	Product Manager	Develop. Manager, QA	Performs Risk Assessment / Creates Risk Management Plan using the Risk Management Plan Template and the Risk Management Plan Procedure in <i>server/projectA/CMM/Req Mgt/Documents/</i> . This includes Assumptions and Constraints.
		11c	Product Manager		Starts Issues Log using Issues Log Template in <i>server/projectA/CMM/Req Mgt/Documents</i> .
		11d	QA		If project is active (starts within three months), outlines/drafts Test Cases using the Test Cases checklist in <i>server/projectA/CMM/Checklists/</i> as requirements are developed to validate/inspect Requirements. (<i>Test Cases must be outlined/drafted before QA inspection of Requirements and customer sign-off</i>)

Project Documentation Checklist

Date	Step	Sub-Step	Primary Role	Additional Role	Activity
		11e	QA		If project is active (starts within three months), starts the Test Plan using the Test Plan Template in <i>server/projectA/CMM/SQA/Documents/</i> .
	12		Product	Develop. Manager	Create Change Control Board per the Change Management Procedure in <i>server/projectA/CMM/SCM/Documents/</i> .
	13		Product Manager	Develop. Manager, QA, IT	If project is active (starts within three months), notifies QA, Develop. Manager, and IT of inspection meeting and sign-off on Requirements and Risk Management Plan using Requirements Checklist and Risk Management Plan Checklist at <i>server/projectA/CMM/Checklists/</i> . IT attends, inspects, and signs-off at IT's option.
	14		Product Manager		Obtains approval of Requirements and Risk Management Plan from Customers.
	15		Product Manager		Obtains approval of Requirements and Risk Management Plan from Development team.
	16		QA		Performs a Stage End CMM Process Assessment if the project is over six months. Otherwise, the assessment will be done at the end of the project.
	17		Product Manager		Completes Status Report Template , in <i>server/projectA/CMM/Proj Tracking/Documents/</i> , used to report to R&D management on project progress at the end of each major stage. The purpose is to document Level 2 activities and identify project issues and resolutions.
	18		Product Manager		Completes Stage End Summary report, in <i>server/projectA/CMM/Proj Tracking/Documents/</i> , directed towards providing the Executive Council with project progress.
	19		Product Manager		Schedules meeting with senior R&D management to review Status Report and Stage End Summary.
	20		Product Manager	SCM	At end of Requirements stage, if funding for project is not continued, stop here. Request SCM archive documents.

Project Documentation Checklist

Design/Project Planning

Note: All documentation is stored in DOORS or ClearCase.

Date	Step	Sub-Step	Primary Role	Additional Role	Activity
	1		Develop. Manager	Tech Pubs Manager	Concurrently
		1a	Develop. Manager		Updates MS Project Development Plan by adding, if necessary, high-level design/project planning tasks, resources, and estimates. Developers charge time to these tasks for developing Work Breakdown Structure tasks and estimating WBS task effort. Statuses plan weekly. Reviews Master Plan weekly.
		1b	Tech Pubs		Starts MS Project Tech Pubs Plan . Statuses plan weekly.
		1c	All	QA, Tech Pubs, Develop., Product Manager	Review Master Plan weekly for schedule impacts, issues
	2		QA		Expands MS Project QS Plan by adding, if necessary, design related tasks.
	3		Develop. Manager	Tech Pubs, IT, Product Manager	Concurrently,
		3a	Develop. Manager	Product Manager, Tech Pubs, IT	Has team create Architectural, Logical, Physical Design, Data Models and detailed design documents using checklists at <i>server/projectA/CMM/Checklists/</i> and referenced standards and templates at the Project Notebook website (<i>//projectnotebook</i>). Product Manager, Tech Pubs and IT are notified of design document repositories to allow reviews and, at their options, attend meetings to provide input.
		3b	Develop. Manager		Develops Software Development Plan using SDP template and Software Development Plan Procedure in <i>server/projectA/CMM/Proj Planning/Documents/</i> .

Project Documentation Checklist

Date	Step	Sub-Step	Primary Role	Additional Role	Activity
		3c	Tech Pubs		Creates Documentation Plan from Template in <i>server/projectA/CMM/Proj Planning/Documents/</i> to complete the documentation portion of the size estimate.
		3d	Develop. Manager		Directs developers to use the WBS.xlt spreadsheet in <i>server/projectA/CMM/Proj Planning/MSProject Templates/</i> to prepare the Work Breakdown Structure for their modules.
		3e	Develop. Manager	Tech Pubs, IT	Uses the Estimating Template.xls in <i>server/projectA/CMM/ProjPlanning/Documents/</i> to estimate Size (software and documentation), Effort, Cost, and Critical Computer Resources for the SDP (IT consulted on last item).
		3f	Tech Pubs		Provides preliminary list of Help topics to Development.
	4		QA		Updates the Test Plan and Test Cases , based on design documentation, to confirm testability.
	5		Develop. Manager		Updates the MS Development Project Plan and Master Project Plan with WBS tasks, resources, and estimates, baselines the plan.
	6		CCB		Change Control Board documents, tracks, resolves change requests and defects, and ensures all affected parties are notified per the Change Management Procedure in <i>server/projectA/CMM/SCM/Documents/</i> .
	7		Develop. Manager	SCM	Updates SCM Plan with Software Configuration Items.
	8		Develop. Manager	QA, Product Manager	Update Risk Management Plan with newly determined Risks.
	9		Develop. Manager	Product Manager, IT, QA	Notifies Product Manager, IT, and QA of inspection meeting and sign-off on Design documents using checklists in <i>server/projectA/CMM/Checklists/</i> IT attends, inspects, and signs-off at IT's option.
	10		Product Manager	Develop. Manager,	Obtain sign-off on the design documents with the customer.

Project Documentation Checklist

Date	Step	Sub-Step	Primary Role	Additional Role	Activity
	11		QA		Performs a Stage End CMM Process Assessment if the project is over six months. Otherwise, the assessment will be done at the end of the project.
	12		Develop. Manager	QA, SCM, Product Managers	Completes Status Report Template , in <i>server/projectA/CMM/Proj Tracking/Documents/</i> , used to report to R&D management on project progress at the end of each major stage. The purpose is to document Level 2 activities and identify project issues and resolutions.
	13		Develop. Manager	QA, SCM, Product Managers	Completes Stage End Summary report, in <i>server/projectA/CMM/Proj Tracking/Documents/</i> , directed towards providing the Executive Council with project progress.
	14		Develop. Manager		Schedules meeting with senior R&D management to review Status Report and Stage End Summary.

Project Documentation Checklist

Coding/Documentation

Note: All documentation is stored in DOORS or ClearCase.

Date	Step	Sub-Step	Primary Role	Additional Role	Activity
	1		Develop., Tech Pubs, and QS Managers	Product Manager	Status MS Project Plans on a weekly basis. Meet to review Master Project Plan
	2		SCM		Creates SCM Status Accounting Report and reviews with Development Team.
	3		Develop. Team	Tech Pubs, DBA, Data Modeler,	Concurrently
		3a	Develop. Team		Codes (code is stored in Configuration Management software system).
		3b	Develop. Team		Updates Designs as needed.
		3c	Develop. Team		Starts Application Run Book using the Run Book Template in <i>server/projectA/CMM/SCM/Documents/</i> .
		3d	Develop. Team		Provides technical input to Tech Pubs for preparation of documentation drafts.
		3e	Develop. Team		Develops Unit Tests per Unit Test Specifications in <i>server/projectA/CMM/Standards/Tests/</i>
		3f	Develop. Team		(OPTIONAL) Integrates draft-version of Help into the Application.
		3g	Develop. Team		Unit tests code.
		3h	Data Modeler	DBA	Prepares schema changes per Data Modeling and DBA Procedures , <i>server/projectA/CMM/SCM/Documents/</i>

Project Documentation Checklist

Date	Step	Sub-Step	Primary Role	Additional Role	Activity
		3i	Tech Pubs		Utilizes use cases, requirements, design, early version of the application, technical input to prepare draft of documentation or Help.
		3j	Tech Pubs		Sends drafts to technical experts for review as to technical accuracy.
		3k	Tech Pubs		Has Subject Matter Experts review documentation for usability.
		3l	Tech Pubs		Checks QS-ready documentation or Help into Configuration Management software system.
	4		Develop. Team	QA	Conduct/participate in code walk-throughs/reviews using the checklists and guidelines in <i>server/projectA/CMM/Checklists/</i>
	5		Tech Pubs	Develop. Team, QA	After completion of code walk-throughs/reviews, Tech Pubs notifies Development Team and QA of inspection of Tech Pubs documentation or Help for technical correctness and usability using the checklist in <i>server/projectA/CMM/Checklists/</i>
	6		Develop. Team		Integrates Help into the Application.
	7		Develop. Team or QA		Perform integration testing of modules/ components. QA takes lead for multiple integrated projects.
	8		CCB		Documents, tracks, resolves change requests and defects, and ensures all affected parties are notified per the Change Management Procedure in <i>server/projectA/CMM/SCM/Documents/</i>
	9		Develop. Manager		Reviews, updates, and statuses the Software Development Plan Estimates SCM Plan Quality Plan Risk Management Plan
	10		QA		Finalizes the Test Plan and Test Cases .

Project Documentation Checklist

Date	Step	Sub-Step	Primary Role	Additional Role	Activity
	11		SCM		Creates SCM Status Accounting Report and reviews with Development Team.
	12		QA		Performs a Stage End CMM Process Assessment if the project is over six months. Otherwise, the assessment will be done at the end of the project.
	13		Develop. Manager	QA, SCM, Product Managers	Completes Status Report Template , in <i>server/projectA/CMM/Proj Tracking/Documents/</i> , used to report to R&D management on project progress at the end of each major stage. The purpose is to document Level 2 activities and identify project issues and resolutions.
	14		Develop. Manager	QA, SCM, Product Managers	Completes Stage End Summary report, in <i>server/projectA/CMM/Proj Tracking/Documents/</i> , directed towards providing the Executive Council with project progress.
	15		Develop. Manager		Schedules meeting with senior R&D management to review Status Report and Stage End Summary.

Project Documentation Checklist

Build/Test/Release (and Beta Acceptance Testing)

Note: All fixes, builds, and schema changes completed during Beta Acceptance Testing must follow this process.

Date	Step	Sub-Step	Primary Role	Additional Role	Activity
	A		Develop. Team	SCM/QA	At all steps, all defects are entered into the change tracking system. Emergency fixes, per the Emergency Change Procedure , <i>server/projectA/CMM/SCM/Documents/</i> , must be entered into tracking system after the fix has been tested and implemented.
	B		CCB		Throughout stage, documents, tracks, and resolves defects per Change Management Procedure , <i>server/projectA/CMM/SCM/Documents/</i> .
	1		Develop., Tech Pubs Managers	QA, Product Manager	Status the MS Project Plans on a weekly basis. Meet to review Master Project Plan.
	2		Develop. Manager	DBA, Data Modeler	Requests a build. DBA provides new database structure, schema changes, and scripts per Data Modeling and DBA Procedure , <i>server/projectA/CMM/SCM/Documents</i>
	3		QA	SCM	Verifies code and scripts/schema changes are complete for a build. Software Configuration Manager performs the build, utilizing build procedures applying to the product in <i>server/projectA/CMM/SCM/Documents/</i> , implements schema changes and scripts per the Build/Release Management Procedure , and performs MATs (Minimum Acceptance Test) and FATs (Functional Acceptance Test) system test.
	4		SCM	QA	If build passes MATs and FATs 100%, prepares Build Release Notes and notifies QA. If build does not pass MATs and FATs, records defects, notifies Development Manager and process stops. (Defects must be corrected per Developer Defect Management Procedure , <i>server/projectA/CMM/SCM/Documents</i> before re-initiating step 2.)
	5		QA		Performs system tests of CRUD (Create, Read, Update, Delete), GATs (GATs on selected applications), regression, etc. as necessary. Records defects as needed.
	6		Develop. Manager	Develop. Team	Start Acceptance Test Turnover Checklist in <i>server/projectA/CMM/Checklists/</i> .
	7		Develop. Manager	QA	Repeat steps 3, 4, and 5 until build has no more level 1 and 2 defects (levels 3 and 4 are at management discretion).

Project Documentation Checklist

Date	Step	Sub-Step	Primary Role	Additional Role	Activity
	8		QA		Completes Release Checklist. Certifies Build for Release to Production/Acceptance Testing.
	9		Develop. Manager	Develop. Team	Complete Acceptance Test Turnover Checklist at <i>server/projectA/CMM/Checklists/</i> .
	10		Develop. Manager	Develop Team	Completes Application Run Book .
	11		QA Develop. Manager	IT, QA	Notifies QA and IT of inspection meeting for Application Run Book using checklists at <i>server/projectA/CMM/Checklists/</i> .
	12		SCM		Performs final audits and housecleaning to close out release and project per Software Configuration Management Procedure in <i>server/projectA/CMM/SCM/Documents/</i> .
	13		QA		Performs a CMM Process Assessment .
	14		Develop. Manager	QA, SCM, Product Managers	Completes Status Report Template , located in <i>server/projectA/CMM/ProjTracking/Documents/</i> , used to report to R&D management on project progress at the end of each major stage. The purpose is to document Level 2 activities and identify project issues and resolutions.
	15		Develop. Manager	QA, SCM, Product Managers	Completes Stage End Summary report, in <i>server/projectA/CMM/Proj Tracking/Documents/</i> , directed towards providing the Executive Council with project progress.
	16		Develop. Manager	QA, SCM, Product Managers, Develop. Team	Completes Project Post-Mortem , in <i>server/projectA/CMM/Proj Tracking/Documents/</i> , to assess the project's process and recommend changes for future projects.
	17		Develop. Manager		Schedules meeting with senior R&D management to review Status Report, Stage End Summary, and Post-Mortem.