

Project Notebook Checklist

A methodical and efficient project checklist can prevent the loss of time while trying to develop a plan for establishing the need for necessary project documentation. It is hoped that the Project Notebook Checklist, located on the following page, will prove useful as a place to begin.

Project Notebook Checklist

PHASE	PROJECT DOCUMENT
INITIATION	PROJECT CONCEPT
	BUSINESS CASE
	PROJECT CHARTER
PLANNING	PROJECT PLAN
	WORK BREAKDOWN STRUCTURE
	RESOURCE PLAN
	PROJECT SCHEDULE
	RISK MANAGEMENT PLAN
	QUALITY PLAN
	COMMUNICATIONS PLAN
	CHANGE MANAGEMENT PLAN
	PROJECT BUDGET ESTIMATE
	PROJECT PLANNING TRANSITION CHECKLIST
EXECUTION/ CONTROL	TECHNICAL PROJECT COMPONENTS
	PROJECT STATUS REPORTS
	CHANGE CONTROL REQUEST / CHANGE CONTROL LOG
CLOSEOUT	ISSUE DOCUMENT / ISSUE TRACKING LOG
	TECHNICAL PROJECT COMPONENTS
	POST IMPLEMENTATION EVALUATION REPORT
	TECHNICAL PROJECT COMPONENTS

PMM Training

There are currently three types of PMM Training.

- One Day PMM Express course – part of the Project Management Novice Certification Program
- Half Day Advance Topics course – part of the Project Management Intermediate Certification Program
- Intuitive Self Learning, via reading the PMM Desk Reference

The One Day PMM Express course is offered monthly, free of charge for Department of Information Technology staff that is enrolled in the PM Novice Certification Program. This session can also be provided for an agency (maximum 16 attendees, standard PMRC charge back rates apply). Contact us for more information, including course syllabus and scheduling dates.

The half-day PMM Express course is offered periodically, free of charge for Department of Information Technology staff that is enrolled in the PM Intermediate Certification Program. Contact us for more information, including course syllabus and scheduling dates.

We are also exploring an e-Learning training component as well.

Contact Information

The PMM can be found in its entirety on the Project Management Resource Center’s website, located at <http://www.michigan.gov/projectmanagement>.

The **Project Management Resource Center** has established a four-prong approach for implementing project management in state government:

- **Training:** Employee development opportunities that contribute to our utilization of the project management discipline.
- **Methodology:** On-line set of procedures and techniques for managing all types of projects.
- **Tools:** Software tools that help plan, analyze, schedule and track projects.
- **Center of Excellence:** A forum to foster and acknowledge achievements in project management excellence.



**STATE OF MICHIGAN
PROJECT MANAGEMENT METHODOLOGY
QUICK REFERENCE**



**MICHIGAN DEPARTMENT OF
INFORMATION TECHNOLOGY
PROJECT MANAGEMENT RESOURCE CENTER
www.michigan.gov/projectmanagement**

DECEMBER 2004

Project Management Resource Center’s Vision
"Excellence in Project Performance"

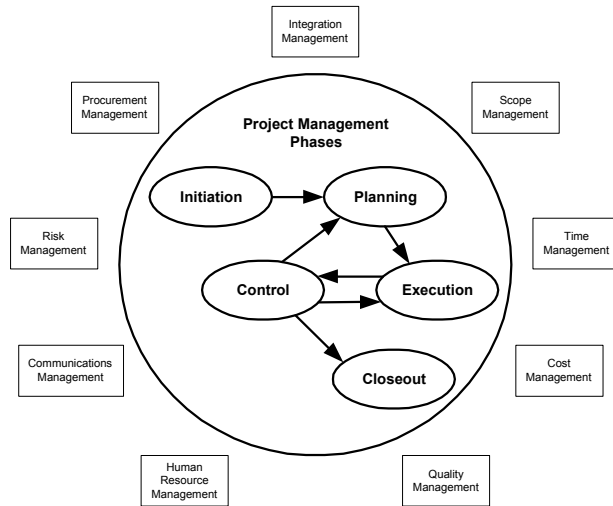
Project Management Resource Center’s Mission
"To Improve Our Customers' Business Operations by
Providing and Promoting Project Management"

The Project Management Methodology consists of three components:

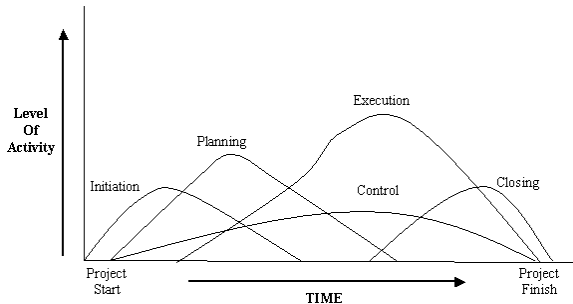
- The PMM Methodology Manual (361 pages)
- The PMM Desk Reference (100 pages), and
- The PMM Templates (19 templates)

The PMM is a "template-driven" methodology, in that the project manager steps through the various PMM Templates as the project progresses through Initiation, Planning, Control/Execution, and Closeout.

PROJECT MANAGEMENT PHASES AND KNOWLEDGE AREAS

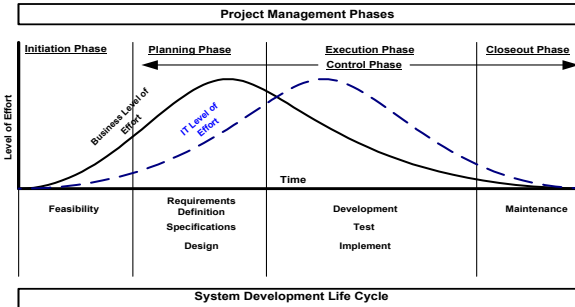


Although the project phases have been established to complement the project teams' involvement with the tasks, these phases are not stand alone as may be indicated in the "phases" portion depicted in the figure above. These phases overlap and can typically resemble something as portrayed in the following figure.



Project Management and The System Development Life Cycle

The Project Management Methodology that is summarized within this guide is intended to be used on any type of generic project effort. However, with the immersion of technology into almost every aspect of the way the State of Michigan does business, Information Technology (IT) Projects have become the most prevalent types of new project efforts. These projects include software development, telecommunications, and hardware installation. Information Technology projects typically have their



own life cycle called the *System Development Life Cycle (SDLC)*. The System Development Life Cycle has its own types of deliverables and processes that are focused on the more technical portions of the project. The diagram above is a graphical representation of the Project Management Phases (top portion) as compared to the System Development Life Cycle (bottom portion). Note that the two processes are performed in parallel and not in place of one another. Project Management is a combination of processes to aid the project manager in order to guarantee complete and correct project management, while the System Development Life Cycle is typically carried out by the technical staff. Because of the large number of Information Technology projects within the agencies, this guide makes several references to the processes that take place at the same time as Project Management efforts. These sections are clearly labeled throughout the desk reference for your use.

Project Initiation Phase

The Project Initiation Phase is the conceptual element of project management. The purpose of the Initiation Phase is to specify what the project should accomplish and to gain management support.

Project Initiation Documents:
Project Concept Document Project Charter
Business Case

Project Planning Phase

The purpose of the Project Planning Phase is to identify and document scope, business requirements, tasks, schedules, risk, quality, and staffing needs. This process should continue until all relevant areas of the chartered project have been addressed.

Project Planning Documents:
The ultimate deliverable from the Planning Phase is the **Project Plan**, which is composed of inputs from the following documents:

Work Breakdown Structure	Communications Plan
Risk Management Plan	Resource Plan
Project Schedule	Quality Plan
Change Management Plan	Project Planning Transition Checklist
Project Budget Estimate	

Technical Project Components: Requirements Definition, Specifications, Design, Implementation, and Training

Project Control Phase

Project Control involves managing the processes that compare actual project performance with planned performance and taking corrective action to yield the desired outcome when significant differences exist.

Project Control Documents: Change Control Request, Issue Document

Technical Project Components: Develop, Test, Implement, Train, and Document

Project Execution Phase

The Execution Phase is when the actual work is done to create the product of the project. During Project Execution, the project effort focuses on participating in, observing, and analyzing work being done.

Project Execution Documents: Status Reports

Technical Project Components: Develop, Test, Implement, Train, and Document

Project Closeout Phase

The Project Closeout Phase involves the administrative and financial efforts needed to close out a project after the work has been completed. Also, during the Closeout Phase the product is transferred to the customer/client.

Project Closeout Documents: Post Implementation Evaluation Report

Technical Project Components: Maintenance Agreements and Service Level Agreements