



Promoting IT Efficiency

**ABC COMPANY  
Extended Accounting System (EAS)  
Project Procedures  
Sample**



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## 1. CONTEXT

**This section provides a basis for why the document has been prepared - it gives the reader an understanding of what they should expect to see in the remainder of the document.**

The ***Project Procedures*** deliverable is used to define all of the procedures the Extended Accounting System (EAS) project team will utilize throughout the life of the project. Project Procedures can range from approving deliverables to migrating code to reporting status. The Project Procedures ensure the EAS project team has applied an appropriate level of rigor for administering the project.

## 2. PROGRESS/STATUS REPORTING

The following sections identify the specific procedures the project team will utilize throughout the completion and implementation of the project. In this example specific procedures have been identified for project/status reporting, configuration management, and deliverable administration.

### 2.1 Project Status – High Level

The Project Manager and Project Director will deliver a project status to the Project Owner once per week. The Project Plan/Schedule/WBS will be used as a basis for delivering the status. At each weekly status meeting, project resources (Project team, Business Analysts, Technical Team Leads) will provide a status of their deliverables to the Project Manager. The Project Manager will ensure this status information is reflected in the applicable plans and schedules of the project. The Project Manager will also prepare and deliver a written (see status report template) project status report to System Owner. The status should reflect the progress on all project deliverables as well as outstanding issues and risks. This weekly status report will be maintained in both electronic and hard copy.

#### Cycle

- Project Team Meeting will be held every Wednesday PM – Each Sub-Project Team members will be asked to provide status on progress to date, issues, impediments, opportunities, etc.
- Meet with Bob Jones either every Wednesday afternoon at 4:00 PM or Thursday mornings at 9:00 am to prepare agenda and follow-up item(s) list for meeting with Terry Smith.
- Develop all necessary documentation to be distributed at the weekly status meeting.
- Meet with Terry Smith and provide update. The meeting is scheduled to take place on Friday morning. Calvin Peters is tasked to prepare record of decision and/or list of action items that result from this meeting. This record of decision and/or list of action items is to be presented to the members at the next Project Team meeting the following Wednesday. If applicable, project document may be updated after the Project Team meeting.
- All items requiring immediate attention as a result of our meeting with Terry Smith are to be dealt with by Daniel Boyton. Progress against these items will be reported and tracked using the processed outlined above.

### 2.2 Project Status – Team

The project team will meet on a weekly basis. Each project team meeting will have an agenda item specifically aimed at obtaining an overall status of the project. Status is to include deliverables, issues, and risks. The author of each deliverable will be scheduled to provide an update on the status of their specific deliverable (status is to include progress, issues, risks associated with the deliverable). The status information provided by the team members at the weekly team meeting will be used to maintain a current version of the project schedule. The project schedule will act as a basis to ensure the System Owner is made aware of project status on a regular basis.

## 2.3 Stakeholder Communication/Status

A bi-weekly meeting is scheduled for the project Stakeholders from Apr 30 2012, through Oct 30 2012. This meeting serves two specific purposes. First, it enables the project team a forum to keep all of the Stakeholders informed on the project activity and status. Second, it establishes a vehicle the project team uses to remain synchronized with the Stakeholders and the progress/status the Stakeholders are making on their specific deliverables.

### 2.3.1 Training Plan

The project team will meet on a weekly basis. Each project team meeting will have an agenda item specifically aimed at addressing the project **Training & Support Plan**. The author of this deliverable will keep the team informed on the overall status of the project training. This includes updating the team on the training strategy, the training modules that will be built by the project team, and the delivery methods/forums that will be applied for training Department resources.

### 3. CONFIGURATION MANAGEMENT

All deliverables prepared by the project team will be subject to the discipline of configuration management. This discipline will ensure the appropriate deliverables are being prepared and controlled. In applying this discipline the deliverables will always reflect the ongoing status on the project. Project files are secured at

#### 3.1 Deliverable Formatting Standard

To ensure uniformity, cohesion, and integrity of the project documentation, each formal deliverable (see Deliverable Descriptions deliverable) will be formatted to incorporate the deliverable documentation standards. Deliverable documentation standards include

- a) title page (company name and deliverable by name)
- b) authorization page (to obtain final authorization/approval of the deliverable)
- c) version control (to ensure project documentation is kept up to date)
- d) table of contents (list all sub-sections of the deliverable)
- e) context (identifying the purpose of the deliverable)
- f) body (informational requirements of the deliverable)
- g) footer (company logo)

#### 3.2 Deliverable File Naming Standard

To ensure a consistency in the naming of project deliverable filenames the following standard will be applied

EAS<DeliverableName>.V<XX>.<YYYYMMDD>

(ie)

EAS.ProjectProcedures.V01.2012Mar17

EAS.FunctionalSpecification.V01.2012May05

#### 3.3 Deliverable “Status”

A lifecycle will be applied for every project deliverable. The following definitions will be applicable to the deliverables. As deliverables mature (through official review and approval) they will be promoted accordingly. All project deliverables will be stored

**“Draft”**– A deliverable has been prepared by an author. Deliverable has not been subjected to the formal “Review” or “Approval” procedures. These deliverables will be stored and maintained at

**“O:/ExtendedAccounting/ProjectDeliverables/Drafts<Project Phase>”.**

**“UnderReview”**– A deliverable has been prepared by an author. Deliverable is in the process of being “Reviewed” but has not been subjected to the “Approval” procedure. These deliverables will be promoted and maintained at

**“O:/ExtendedAccounting/ProjectDeliverables/UnderReview<ProjectPhase>”.**

**“Approved”**– A deliverable has been prepared by an author. Deliverable has successfully passed through the “Review” and “Approval” procedure. These deliverables will be promoted and maintained at

**“O:/ExtendedAccounting/ProjectDeliverables/Approved<ProjectPhase>”.**



### 3.4 Deliverable Version Control

As project deliverables are created, updated, reviewed, and approved the following practices will be applied to ensure an audit trail exists between and among all project documentation/deliverables.

“Draft” – Multiple versions of each deliverable will be present in this directory. In preparing their deliverables, each author will be responsible for incrementing and maintaining the version numbers of their specific deliverable.

“UnderReview” – Multiple versions of each deliverable can be present in this directory. To be promoted into this environment, the author of the deliverable will inform the Configuration Management Lead that the document has been “reviewed” and can be promoted. The Configuration Management Lead will promote this “reviewed” deliverable to the “UnderReview” directory and increment the version number accordingly.

“Approved” – Only one version of each deliverable can be present in this directory. To be promoted into this environment, the author of the deliverable will inform the Configuration Management Lead that the document has been “approved” and can be promoted. The author will forward both an electronic version and a hard copy (signed with approvals) of the deliverable to the Configuration Management Lead. The electronic copy will be promoted to the “approved” directory (version reset to 01) and the hard copy will be maintained/filed with the other project deliverables under the purview of the Configuration Management Lead.

## 4. DELIVERABLE ADMINISTRATION

All deliverables produced by the project team will undergo both a “review” process (incorporating information/suggestions from other project team members) and an “approval” process (scrutinized by the appropriate project authority) before they can be deemed as complete. The following sub-sections identify the method/approach the team will utilize for the “review” and “approval” of all its project deliverables.

### 4.1 Deliverable Creation

The ***Roles & Responsibilities (Responsibility Matrix)*** deliverable will be used as a basis and reference for the purpose of reviewing all deliverables. The Responsibility Matrix deliverable will be prepared and maintained by the Project Manager. The Responsibility Matrix deliverable contains a table that identifies the project team member responsible for authoring the specific deliverable, and the project resources that will be responsible for reviewing the deliverable.

### 4.2 Deliverable Review

Once the author has completed an initial draft of the specific deliverable, they will inform the Project Manager and the “reviewers” of that deliverable it is ready for their review – an electronic copy of the deliverable will be forwarded to the “reviewers”. An initial review meeting will be scheduled (within three days of sending out the deliverable for review) by the “author” of the deliverable – reviewers will provide critique, comments and suggestions pertaining to the deliverable. The author will take notation of comments received from the “reviewers”. Upon entering the required changes (as suggested by the reviewers) the author of the deliverable will schedule a final review meeting (within one week of the initial meeting) with the reviewers to ensure the deliverable can be sent for approval. The author will ensure that project standards (document templates, file naming conventions and version control) have been applied in the creation of the deliverable. Once the deliverable has been effectively reviewed, the author will inform the Project Manager that it is available for approval and will promote the deliverable to a status of “Under Review” – see “Document Administration” deliverable.

### 4.3 Deliverable Approval

The appropriate project team resources (see roles and responsibilities - deliverable matrix) conducts a weekly (as is required) meeting for the purpose of reviewing and/or approving deliverables prepared by the project team members (authors). During this review/approval meeting, each deliverable will be scrutinized to ensure it satisfies its required informational requirements. The author will take notation on comments and suggestions made during the meeting. Upon completion of the meeting the deliverable will be deemed to have a status of “approved” or “under review”. If deemed to be “approved” the deliverable will be promoted to the “approved” directory/folder and secured accordingly.

### 4.4 Deliverable Distribution

Distribution of any project deliverable will be limited based on the discretion of the Project Manager. Upon receiving instruction from the Project Manager, the Configuration Management Lead will distribute/forward copies (hard/electronic) of project deliverables.

