

# Project Manager Checklist

	Item	Deadline	Done?	Comments
<b>ANALYSIS</b>				
Required	Review project request in JIRA submitted by client, and any accompanying documentation		<input type="checkbox"/>	if this is not thorough enough, complete relevant information in "analysis" phase of project (project charter and scope document)
Required	Check Confluence for existing documentation		<input type="checkbox"/>	i.e., what institutional knowledge already exists?
Required	Start Project Charter, with a focus on the scope and requirements		<input type="checkbox"/>	
Required	Set up project space in Confluence and start your project plan (task list and timeline)		<input type="checkbox"/>	e.g., copy project plan template and modify it for your project
Required	Give stakeholders access to Confluence		<input type="checkbox"/>	internal to IIT only, external folks cannot access Confluence
<b>INITIATION</b>				
If applicable	Create and send out a requirements gathering survey and set up requirements gathering meetings		<input type="checkbox"/>	make sure to ask about single sign-on and API/SAML integration with Okta
If applicable	Related to completing requirements, conduct and document a BPA and BPR when applicable – can use Visio, or Gliffy (in Confluence) for process mapping.		<input type="checkbox"/>	
Required	Conduct requirements gathering meeting/s		<input type="checkbox"/>	
<b>PLANNING</b>				
Required	Complete Project Charter and get relevant <b>sign-offs</b> (this includes Scope and high level Requirements) - first ES lead needs to sign off - Stakeholder sign-off		<input type="checkbox"/>	meet with project team as needed; discuss scope for technical issues vs functional issues
Required	Ensure that lower test environments are ready for the project. Determine which environment you will need to test in.		<input type="checkbox"/>	Meet with project team and determine how to test and where it can be done. Ensure the environment is available.
If applicable	See if test data needs to be refreshed so Stakeholders can test accurate data.		<input type="checkbox"/>	Work with OTS (Lenard) to refresh data.
If applicable	Get other <b>sign-offs</b> , as needed. For Student data: Registrar; Employee data: need sign off from HR; new applications need sign-off by CTS to make sure they have the correct security settings, as well as any vendor using Personally Identifiable Info (PII)		<input type="checkbox"/>	try to get sign off prior to any mapping exercises  Note: PMs and Developers should be working together (~3 days into development work) to show examples of data to end users/stakeholders to check the data and make sure it's what they're looking for. (Do this well before any mapping exercises.)
If applicable	Get technical design <b>sign-off</b> from the ES managers		<input type="checkbox"/>	- have developers check existing documentation for the technology if it is existing technology - developers should confirm resources are aligned with requirements -this will be required 90% of the time
Required	Start implementation plans, including a project timeline, SMART goals, risk plans, and communication plans.		<input type="checkbox"/>	
Required	Schedule the kickoff meeting		<input type="checkbox"/>	create slide deck for larger projects <a href="#">Project Kickoff Process</a>
If applicable	If a new database account is needed, we need to create an application support ticket, asking developers need to create the DB account or schema, when applicable (for new software), eg. [newname].iit.edu		<input type="checkbox"/>	
If applicable	Make the Networking Team aware of the project if applicable (e.g., if new domains are needed).		<input type="checkbox"/>	Domains need to be added to DNS directory which is an overnight job (Contact Upendra for Mies campus; Sejal for Kent)
If applicable	Engage provisioning team (Eric Breese and Sean Knight) when needed		<input type="checkbox"/>	Recommend including someone from Sean's team on training sessions, for new accounts that are needed within a new system
If applicable	Give external/internal developers access to the servers, when applicable		<input type="checkbox"/>	do this sooner rather than later
If applicable	If a vendor is having access trouble, check with NSG to see if their account is active in the Active directory (VPN) auth server.		<input type="checkbox"/>	If it is, have the vendor download a new VPN client by going to <a href="https://vpn.iit.edu">https://vpn.iit.edu</a> in a browser and log in to download the new VPN client using correct credentials. If login fails on <a href="https://vpn.iit.edu">https://vpn.iit.edu</a> then you will probably want a ticket with NSG + system service to restore the VPN access. They can also try the names below if vpn-1.iit.edu stops working: <a href="https://vpn.iit.edu">vpn.iit.edu</a> / <a href="https://vpn-1.iit.edu">vpn-1.iit.edu</a> / <a href="https://vpn-2.iit.edu">vpn-2.iit.edu</a>
If applicable	If needed, ask developers to create a Bit Bucket repository (a place developers submit their code/queries)		<input type="checkbox"/>	
Required	<b>Conduct kickoff meeting</b>		<input type="checkbox"/>	<a href="#">Project Kickoff Process</a>
Required	Schedule weekly touchpoints and timeline review w/stakeholders		<input type="checkbox"/>	
Required	Determine project team communications and meeting cadence		<input type="checkbox"/>	
Required	Create relevant sprints in JIRA and assign tasks		<input type="checkbox"/>	
Required	<b>Create overall project timeline and share with project team</b>		<input type="checkbox"/>	1) Try to anticipate go-live dates in planning phase 2) Assess student needs/requirements when setting a timeline 3) Check the change control freeze schedule when creating your timeline <a href="https://ots.iit.edu/upcoming-events">ots.iit.edu/upcoming-events</a> (exceptions require justification)
Required	Create/refine communication plan/s - match the communications with the project scope/urgency		<input type="checkbox"/>	Plan stakeholder engagement to support project at key times
If applicable	For broader communications to campus community, work with functional users or OTS Communication Director (Illinois Tech Today submissions, Campus Newsletters, etc)		<input type="checkbox"/>	Submission form: <a href="https://today.iit.edu/default-form/">https://today.iit.edu/default-form/</a> Contact <a href="mailto:iitoday@iit.edu">iitoday@iit.edu</a> with any special instructions or questions

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If applicable	As project is being conducted, developers should fully document design and configurations in Confluence		<input type="checkbox"/>	(including application logging, errors, informational events, and warnings)
If applicable	Back-out plan created and discussed with stakeholders/clients		<input type="checkbox"/>	
If applicable	For vendor engagements: discuss data integrity, compliance, and back-ups		<input type="checkbox"/>	Ask if anything needs to be backed up (typically by vendor), and if so, how.
If applicable	Create a project implementation schedule for Go-Live		<input type="checkbox"/>	
If applicable	Consider any Portal changes and SSO; plan accordingly for Testing and Go Live		<input type="checkbox"/>	
If applicable	For anything requiring branding, logos, or color-schemes, get sign-off from M&C		<input type="checkbox"/>	Refer to Illinois Tech logo and branding guidelines: <a href="#">M&amp;C Logo and Branding Guidelines</a>
<b>EXECUTING</b>				
Required	Plan and conduct a <b>user testing planning meeting</b> with ES resources and functional users		<input type="checkbox"/>	Refer to requirements list and testing plan template. Discuss who is testing, what the sample set will be (e.g., if looking at a database), and how the functional users will validate the functionality.
Required	Oversee creation of a finalized testing plan		<input type="checkbox"/>	usually created by vendor or end users
Required	Quality Assurance ES <b>sign-off</b> on technical solution (APIs, etc.) prior to Stakeholder sign-off		<input type="checkbox"/>	review QA checklist a different developer needs to validate the process
Required	Functional user testing		<input type="checkbox"/>	
Required	Stakeholder <b>sign-off</b> on testing and delivered solution (email to PDF, upload to confluence) in lower environment		<input type="checkbox"/>	NOTE: ask stakeholders to provide written documentation as well as <b>justification</b> for their decisions/configurations if they are different from what was originally advised or planned
If applicable	Schedule change control tickets when applicable, and attend Change Control meetings (Wednesdays) to "defend" your project moving to a live/production environment		<input type="checkbox"/>	Include applicable sign-offs and QA checklist sign-off <a href="#">PMO Change Control Instructions</a>
Required	Once technology is live in Production environment, it needs to be validated first by developers, and then by Stakeholder.		<input type="checkbox"/>	
Required	Create and track metrics for success (compare/track against requirements)		<input type="checkbox"/>	
<b>CLOSEOUT</b>				<a href="#">Project Close-out Processes</a>
Required	Schedule a closeout meeting		<input type="checkbox"/>	
Required	Send closeout survey		<input type="checkbox"/>	ask for survey to be completed 3+ days prior to close-out meeting
Required	Complete closeout document from survey response themes		<input type="checkbox"/>	
Required	Conduct closeout meeting		<input type="checkbox"/>	use the closeout form as meeting agenda
Required	Complete closeout summary (1-pager)		<input type="checkbox"/>	
<b>WARRANTY</b>				
If applicable	Conduct any warranty activities required		<input type="checkbox"/>	
If applicable	RAID log, if needed		<input type="checkbox"/>	
If applicable	Metrics meeting, if needed		<input type="checkbox"/>	

On-Site Engagement Checklist				
Project:				
Stakeholder:				
Date:				
PM:				
Item	Responsibility (Role) (PM, BA, Dev., Stakeholder)	Responsibility (Name)	Done?	Comment
Appoint PM			<input type="checkbox"/>	
Get project (and/or business case) approved by senior management			<input type="checkbox"/>	
Appoint engagement participants			<input type="checkbox"/>	
Define project objectives			<input type="checkbox"/>	
Identify initial project risks			<input type="checkbox"/>	
Produce list of deliverables			<input type="checkbox"/>	
Pre-work/Trainings to be done			<input type="checkbox"/>	
Email vendor to make introduction and find out logistics for on-site visit			<input type="checkbox"/>	
Does the vendor need:			<input type="checkbox"/>	
Food?			<input type="checkbox"/>	Provide food options, collect dietary restrictions, etc.
Parking?			<input type="checkbox"/>	
Internet/VPN access?			<input type="checkbox"/>	
Special Software/systems access?			<input type="checkbox"/>	
TV or other AV equipment (projector)?			<input type="checkbox"/>	
Other?			<input type="checkbox"/>	
Book meeting room(s)			<input type="checkbox"/>	
Create user accounts for the team			<input type="checkbox"/>	
Create task lists			<input type="checkbox"/>	
Set up a Confluence page with all documentation, IIT PMO team, and Vendor information			<input type="checkbox"/>	
Send out email to vendors and participants with all logistics prior to the start of the on-site visit			<input type="checkbox"/>	

PHASE	DESCRIPTION	OUTPUT
0) Initiation (pre-project start)	The PMO may seek additional information about the request in order to assess it, like clarifying a problem statement, understanding requirements, and/or conducting a current state business process analysis, when applicable.	Business Case via project request submission form
1) Initiation	In this phase, the PMO focuses redesign are used to determine a clear problem statement and anticipated solution. A project charter is solidified.	IPR Project Charter (scope, requirements, targets)
2) Planning	Determine how the objectives will be met. Create and refine implementation plans, including SMART goals, risk plans, and communication plans. A high level timeline is created, the solution is designed. A project kick off meeting is then conducted.	Detailed requirements and sign-off Design Project timeline Communication plan Kick-off meeting
3) Executing	Track progress on tasks, conduct testing, implement needed revisions, and move the solution into the final, or production environment. Conduct monitoring and controlling activities, including quality analysis, including project team feedback, and capturing success metrics.	Testing and Execution plans Testing plans QA sign-off Metrics tracking Other project plans as needed
4) Closing	Conduct close-out meeting with project team, get feedback, and review warranty period activities. Hand-off future issues to production support.	Close out meeting notes Close out meeting Project summary
5) Warranty	Technology issues go to production support team, but PM stays engaged through the rotation. The PM may schedule short meetings to capture metrics that were unknown at the time of project close-out.	SLA'd log, if needed Metrics meeting, if needed

### Submission and Selection



**\*There are two identical PMO cycles per year.**

- PMO Rotation 1: January-June
- PMO Rotation 2: July-December

### LifeCycle Phases for Active Projects\*













