Executing Projects with IT Methodologies

IT Methodology Webinar

PROJECTinsight
Project & Portfolio Management Software
Things to know...

- All participants will be on mute
- Questions are welcome
- Ask questions in the question box
- Training may be valid for PMI Category C PDUs
- We do not mail out PDU certificates
Cameron Watson

President, QAassist

cwatson@qaiassist.com

www.qaiassist.com
Who’s on the Call?

- I am a Project Manager
- I am a Business or Operational Manager
- I am a software developer or software tester
- I am a member of an organizational PMO, governance or quality assurance function
- I want a better understanding of IT Methodology
Established 2007 – Ottawa, Canada

Pioneer of IT Methodologies for small and mid-sized business (SMB’s)

Maintain and promote an IT Methodology body of knowledge (BOK) SMB’s and practitioners rely on to optimize the delivery of products, services and operational performance

Administer IT Methodology certification - “QAIassist Foundation”

Support practitioners and authorized affiliates in delivering IT Methodology knowledge and expertise
QAlassist Webinar Series - Goals

- Share IT Methodology knowledge
- Develop IT methodology understanding & expertise
- Provide additional insight into several IT (project management, software development, software testing) methodologies
- Discuss best practices on incorporating an organizational IT methodology
2014 Schedule

- **The 3rd Wednesday of Every Month**
  - 8:00 am Pacific - 11:00 am Eastern Time

- **IT Methodology Concepts (60 mins)**
  - This series of six webinars will be presented on a bi-monthly basis. Each webinar will provide you with a context, overview, terminology and general understanding of information technology (IT) methodology.

- **IT Methodology – Tutorials (45 mins)**
  - This series of five webinars will be presented on a bi-monthly basis. Each session is designed to offer a more “hands on” perspective – bridging the concepts into a practical utilization.
2014 “Concepts” Schedule

The 3rd Wednesday of Month (Jan, Mar, May, Jul, Sept, Nov)
- 8:00 am Pacific - 11:00 am Eastern Time

IT Methodology Concepts (60 mins)
- Methodology for the IT Landscape - (Jan)
- Apply PM Fundamentals to IT - (Mar)
- Leverage the Software Development Lifecycle - (May)
- Explore the Software Testing Lifecycle - (Jul)
- Incorporate Organizational Process Governance - (Sept)
- Implementing IT Methodology - (Nov)
2014 “Tutorials” Schedule

- The 3rd Wednesday of Month (Feb, Apr, Jun, Aug, Oct)
  - 8:00 am Pacific - 11:00 am Eastern Time

- IT Methodology Tutorials (45 mins)
  - Applying IT Methodology to Project Initiation - (Feb)
  - Project Planning & Design with IT in Mind - (Apr)
  - Executing Projects with IT Methodologies - (Jun)
  - Project Control & Verification - (Aug)
  - Project Close & Delivery - (Oct)
2013 “Tutorials” Schedule

The 3rd Wednesday of Month (Feb, Apr, Jun, Aug, Oct)

- 8:00 am Pacific - 11:00 am Eastern Time

IT Methodology Tutorials (45 mins)

- Applying IT Methodology to Project Initiation - (Feb)
- Project Planning & Design with IT in Mind - (Apr)
- Executing Projects with IT Methodologies - (Jun)
- Project Control & Verification - (Aug)
- Project Close & Delivery - (Oct)
Executing Projects with IT Methodologies

Agenda

- IT Methodology Context - general terminology, “noun” and “verb”, hierarchy (noun), deliverable construct/format, depictions, integration
- Tutorial Context and Review - Sample Project Definition
  - Project Initiation (Feb 2014)
  - Project Planning and Design (Apr 2114)
- Software Development Lifecycle (SDLC) - objectives, context, integrations, scope definition
- Software Development Lifecycle (SDLC) - deliverables
- Recap
Executing Projects with IT Methodologies

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IT Methodology - Terminology

- IT Framework, IT Methodology, IT Lifecycle
  - Non Standard usage in terminology
  - Terms are used interchangeably between organizations and across the IT industry
  - Examples include
    - Project Management Methodology/Lifecycle/Framework
    - Software Development Methodology/Lifecycle (SDLC)/Framework
    - Software Testing Methodology/Lifecycle/Framework
  - Every IT organization is using an IT Methodology or IT Lifecycle or IT Framework
IT Methodology – Map & Journey

- Methodologies/Lifecycles - “noun”
  - The roadmap
  - Rational Unified Process (RUP), QAassist (IM), PMI, Prince2
- Methodologies/Lifecycles - “verb”
  - The journey taken along the road
  - Waterfall, Spiral, Agile, RAD, Prototyping, etc
All Methodologies/Lifecycles (RUP, QAIassist, PMI, Prince2) define, utilize and rely on their own pre-defined structure, naming conventions, and terminology.

Hierarchy/Structure

- Methodology/Lifecycle (ie Project Management, Software Development, Software Testing)
- Phase/Stage (ie Initiate, Planning, Design, Closeout)
- Deliverable/Artifact/Work Product (ie Project Charter, Testing Strategy)
- Activity (tasks performed to complete deliverables, artifacts, work products)
Deliverable – Construct/Format

- Fixed Sections (always populated)
  - Title Page
  - Deliverable Details (Author, Creation Date, Version, Status, etc)
  - Deliverable History, Reviewers, Sign Off
  - Table of Contents (as per deliverable)
  - Context (purpose of the deliverable)

- Variable Sections (populated based on unique project characteristics)
  - Structure/format defined per deliverable (ie all Project Charter deliverables rely on the same format, all Testing Strategy deliverables rely on the same format)
IBM’s Rational Unified Process (RUP)
PMI’s Project Management Methodology

Initiation → Planning and Design → Executing ↔ Monitoring and Controlling → Closing
# QAlassist Integrated Methodology

## Initiate

- **Business Case**
  - Detailed Business Requirements

## Plan

- **Project Charter**
  - Project Plan
- **Project Schedule/WS**
- **Roles & Responsibilities**
- **Project Deliverables**
  - Config Management Plan
  - Quality Assurance Plan

## Execute & Control

- **All previously created PM deliverables**
  - Project Risk Definition
  - Project Risk Log
  - Project Issue Definition
  - Project Change Request Definition
  - Project Change Request Log

## Closeout

- **Team Status Report**
  - Project Status Report
  - Unit Test (UT) Authorization

## Systems Analysis

- **Entry Deliverables**
  - Business Case
  - Project Charter
  - Detailed Business Requirements

## Design

- **Entry Deliverables**
  - High Level Solution Design
  - Regent’s Traceability Log

## Build

- **Entry Deliverables**
  - Detailed Solution Design
  - Programming Specifications
  - Regent’s Traceability Log

## Test

- **Entry Deliverables**
  - Unit Code
  - (UT) Plan
  - (UT) Evaluation Criteria
  - Regent’s Traceability Log

## Release

- **Entry Deliverables**
  - Unit Code
  - (UT) Authorization
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Tutorial Context – Sample Project

- ABC Company (mid sized)
- Strategic Direction - incorporate outsourcing option into existing operations
- Existing Accounting Application functionality does not
  - meet evolving regulatory legislation (for outsourcing)
  - deliver functionality necessary to administer outsourcing & vendor relations
  - provide stability (up time) to the business users
  - allow for expansion

- Project Name – “Extended Accounting System (EAS)”
Tutorial Context – Resource Availability

- System Owner
- Stakeholders
- Business/Line Manager
- Project Manager
- Business Analysts
- Architects (Functional/Technical)
- Programmers
- Testers
- End Users
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Tutorial I - Identifying the Business Need

Goal/Objective

- what is the origin of the business need (new product, new functionality, strategic objectives, legislative regulations, etc)
- who will benefit from a solution
- where/how will the benefits (tangible and intangible) be recognized
- organizational effects once implementing the solution
- establish basis for executing project management, software development, software testing methodologies

Iterations

- iterative within itself
### QAassist Integrated Methodology

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Tutorial I - Deliverables

- Business Case - (SDLC)
- Detailed Business Requirements - (SDLC)
- Project Charter - (PMLC)
- Roles & Responsibilities - (PMLC)
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Tutorial II – Project Planning & Design

Goal/Objectives
- verify resources available to complete the project
- establish a plan that will allow project to be delivered on time and within budget
- establish a schedule that identifies the work (deliverables, artifacts, work products) to be completed by the project team members
- obtain official authorization of the scope, plan and schedule from project stakeholders

Iterations
- iterative within itself
- iterative utilizing the software development lifecycle and software testing lifecycle
# QAIassist Integrated Methodology

## Initiate
- Business Case
- Detailed Business Requirements

## Plan
- Project Charter
- High-Level Solution Design
- Programming Specifications

## Build
- Unit Code
- Training & Support Plan

## Test
- Unit Test (UT) Evaluation Criteria
- (SIT) Evaluation Criteria
- (UIT) Evaluation Criteria

## Closeout
- Team Status Report
- Project Status Report
- User Acceptance Test (UAT) Authorization

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**Software Development**

- Business Case
- Detailed Business Requirements
- High-Level Solution Design
- Programming Specifications

**Software Testing**

- Business Case
- Detailed Business Requirements
- High-Level Solution Design
- Programming Specifications

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  - Detailed Business Requirements
- Exit Deliverables:
  - High Level Solution Design
  - Requirements Traceability Log

**Design**
- Entry Deliverables:
  - High Level Solution Design
  - Programming Specifications
  - Requirements Traceability Log
- Exit Deliverables:
  - Detailed Solution Design
  - Programming Specifications
  - Requirements Traceability Log

**Build**
- Entry Deliverables:
  - Unit Code
  - Training & Support Plan
  - Requirements Traceability Log
- Exit Deliverables:
  - Unit Code
  - Training & Support Plan
  - Requirements Traceability Log

**Test**
- Entry Deliverables:
  - Unit Code
  - (UT) Evaluation Criteria
  - Requirements Traceability Log
- Exit Deliverables:
  - Unit Code
  - (UT) Evaluation Criteria
  - Requirements Traceability Log

**Release**
- Entry Deliverables:
  - Unit Code
  - (UT) Authorization
  - Requirements Traceability Log
- Exit Deliverables:
  - Unit Code
  - (UT) Authorization
  - Requirements Traceability Log

**Software Development**
- Entry Deliverables:
  - Business Case
  - Detailed Business Requirements
- Exit Deliverables:
  - High Level Solution Design
  - Requirements Traceability Log

**Software Testing**
- Entry Deliverables:
  - High Level Solution Design
  - Testing Strategy
- Exit Deliverables:
  - SIT Plan
  - SIT Evaluation Criteria
  - Requirements Traceability Log

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QAIassist Integrated Methodology

Initiate

- Business Case
- Detailed Business Requirements

Plan

- Project Charter
- Project Schedule/WBS

Execute & Control

- Detailed Solution Design
- Programming Specifications
- Regrets Tracingability Log

Closeout

- Project Closeout
- Team Status Report
- Project Status Report

Test

- Unit Test (UT) Authorization

Release

- Entry Deliverables
  - Unit Code
  - UT Test Log

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# QAllassist Integrated Methodology

## Initiate
- Business Case
- Detailed Business Requirements

## Plan
- Project Plan
- Project Schedule/Work Breakdown Structure (WBS)

## Execute & Control
- All previously created PM deliverables
- Project Risk Management Plan
- Project Change Request Definitions

## Closeout
- Team Status Report
- Project Status Report

## Systems Analysis
- Entry Deliverables
  - Business Case
  - Detailed Business Requirements

## Design
- Entry Deliverables
  - High Level Solution Design
  - Programming Specifications

## Build
- Entry Deliverables
  - Unit Code
  - Training & Support Plan

## Test
- Entry Deliverables
  - Unit Test (UT) Evaluation Criteria
  - Unit Test (UT) Authorization

## Release
- Entry Deliverables
  - User Code (UT) Release
  - User Code (UT) Authorization

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**QAIassist 2014**

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QAIassist Integrated Methodology
# QAIassist Integrated Methodology

## Initiate
- Business Case
- Detailed Business Requirements

## Plan
- Project Charter
- Project Schedule/WS
- Project Deliverables
- Quality Assurance Plan
- Project Procedures

## Execute & Control
- All previously created PM deliverables
- Project Risk Register
- Project Risk Log
- Project Issue Log
- Project Change Request Definition
- Project Change Request Log

## Closeout
- Team Status Report
- Project Status Report
- Unit Test (UT) Authorization
- System Test (ST) Authorization
- User Acceptance Test (UAT) Authorization

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### Systems Analysis
- **Entry Deliverables**
  - Business Case
  - Project Charter
  - Detailed Business Requirements

- **Exit Deliverables**
  - High-Level Solution Design
  - Requirements Traceability Log

### Design
- **Entry Deliverables**
  - High-Level Solution Design
  - Requirements Traceability Log

- **Exit Deliverables**
  - Detailed Solution Design
  - Programming Specifications
  - Requirements Traceability Log

### Build
- **Entry Deliverables**
  - Detailed Solution Design
  - Programming Specifications
  - Requirements Traceability Log

- **Exit Deliverables**
  - Unit Code
  - Training & Support Plan
  - Requirements Traceability Log

### Test
- **Entry Deliverables**
  - Unit Code
  - (UT) Evaluation Criteria
  - Requirements Traceability Log

- **Exit Deliverables**
  - (UT) Test Results
  - (UT) Authorization
  - Requirements Traceability Log

### Release
- **Entry Deliverables**
  - (PT) Authorization
  - (UAT) Evaluation Criteria

- **Exit Deliverables**
  - (UAT) Test Results
  - (UAT) Authorization
  - Requirements Traceability Log
QAllassist Integrated Methodology
Deliverables

- Project Plan (PMLC)
- Project Schedule/WBS (PMLC)
- Project Quality Assurance Plan (PMLC)
- Project Configuration Management Plan (PMLC)
- Project Procedures
- Project Deliverables
Tutorial II – Associated PM Deliverables

- Potential/Associated Project Management Lifecycle Deliverables
  - Issues Log
  - Risk Log
  - Change Request Log
  - Project Status Report
  - Team Status Report
  - Unit Test Defect Log
  - System Integration Test Defect Log
  - User Acceptance Test Defect Log
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Tutorial III – Executing the SDLC

Objectives

- establish a foundation for ongoing collaboration and communication between Business/User Community and Information Technology/IT resources
- necessary functionality is designed and built to reflect the authorized business requirements – appropriate level of documentation is created to maintain and support the functionality in the future
- unit code successfully tested according to the authorized design and business requirements - authorized unit code is made available for additional testing (i.e., system integration testing, user acceptance testing)
- does NOT include System Integration Testing or User Acceptance Testing
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Traditional "V" Diagram
SDLC Context
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**QAlassist Integrated Methodology**

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**QAIassist 2014**
# QAlassist Integrated Methodology

## Methodology Overview

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## Executable Deliverables

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## Software Development

- Software Development

## Software Testing

- Test Case

## Notes

- QAIassist 2014

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**PROJECTinsight**

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**Software Development**

- **Systems Analysis**
  - Entry Deliverables: Business Case
  - Exit Deliverables: High Level Solution Design
  - Entry Deliverables: Detailed Business Requirements
  - Exit Deliverables: Detailed Solution Design

**Design**

- Entry Deliverables: High Level Solution Design
  - Exit Deliverables: Programming Specifications
- Entry Deliverables: Detailed Solution Design
  - Exit Deliverables: Testing Strategy
- Entry Deliverables: Programming Specifications
  - Exit Deliverables: Training & Support Plan

**Build**

- Entry Deliverables: Unit Code
  - Exit Deliverables: Unit Test (UT) Plan
- Entry Deliverables: Unit Test (UT) Evaluation Criteria
  - Exit Deliverables: Unit Test (UT) Evaluation Criteria

**Test**

- Entry Deliverables: Unit Code
  - Exit Deliverables: Unit Test (UT) Plan
- Entry Deliverables: Unit Test (UT) Authorization
  - Exit Deliverables: Unit Test (UT) Evaluation Criteria

**Release**

- Entry Deliverables: Unit Code
  - Exit Deliverables: Unit Test (UT) Plan
- Entry Deliverables: Unit Test (UT) Authorization
  - Exit Deliverables: Unit Test (UT) Evaluation Criteria

**PROJECT insight**

Initiate Project Intelligence®
QAIassist Integrated Methodology

Initiate
- Business Case
- Detailed Business Requirements

Plan
- Project Charter
- Project Plan
- Risk & Responsibility
- Project Deliverables
- Change Management Plan
- Quality Assurance Plan
- Project Procedures

Execute & Control
- All previously created PM deliverables
- Project Risk Definition
- Project Risk Log
- Project Change Request Definition
- Project Change Request Log
- Project Change Request
- Project Status Report
- Project Status Log
- Unit Test (UT) Test Log
- Unit Test (UT) Authorization
- User Acceptance Test (UAT) Test Log
- User Acceptance Test (UAT) Authorization
- Project Closeout

Closeout
- Project Closeout

Systems Analysis
- Entry Deliverables
  - Business Case
  - Detailed Business Requirements
  - High Level Solution Design
  - Test Plan

Design
- Entry Deliverables
  - High Level Solution Design
  - Detailed Solution Design
  - Programming Specifications
  - Regressions Traceability Log

Build
- Entry Deliverables
  - Unit Test (UT) Test Log
  - Unit Test (UT) Evaluation Criteria
  - Unit Test (UT) Authorization

Test
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  - Unit Test (UT) Authorization

Release
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  - Unit Test (UT) Evaluation Criteria
  - Unit Test (UT) Authorization

Software Development
- Entry Deliverables
  - Business Case
  - Detailed Business Requirements
  - High Level Solution Design
  - Test Plan

Software Testing
- Entry Deliverables
  - Business Case
  - Detailed Business Requirements
  - High Level Solution Design
  - Test Plan

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### Systems Analysis
- **Entry Deliverables**
  - Business Case Details
  - Project Charter
  - Detailed Business Requirements

### Design
- **Exit Deliverables**
  - High-Level Solution Design
  - Detailed System Design

### Build
- **Exit Deliverables**
  - Unit Code
  - Training & Support Plan

### Test
- **Exit Deliverables**
  - Unit Test (UT)
  - System Test (ST)

### Release
- **Exit Deliverables**
  - User Acceptance Test (UAT)
  - System Acceptance Test (SAT)

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**PROJECTinsight**

Initiate Project Intelligence

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# QAIassist Integrated Methodology

## Initiate
- Business Case
- Project Charter
- Detailed Business Requirements

## Plan
- Project Plan
- Project Schedule
- Risk & Responsibilities
- Project Deliverables
- Config. Management Plan
- Quality Assurance Plan
- Project Procedures

## Execute & Control
- All previously created PM deliverables
- Project Risk Definition
- Project Risk Log
- Project Change Request Definition
- Project Change Request Log
- Project Status Report
- Project Status Report
- Change Management
- User Acceptance Test (UAT) Authorization

## Closeout
- Project Closeout

## Systems Analysis
- Entry Deliverables
  - Business Case
  - Project Charter
  - Detailed Business Requirements

- Exit Deliverables
  - High Level Solution Design
  - Regt's Traceability Log

## Design
- Entry Deliverables
  - High Level Solution Design
  - Regt's Traceability Log

- Exit Deliverables
  - Detailed Solution Design
  - Programming Specifications
  - Regt's Traceability Log

## Build
- Entry Deliverables
  - Detailed Solution Design
  - Programming Specifications
  - Regt's Traceability Log

- Exit Deliverables
  - Unit Code
  - Training & Support Plan
  - Regt's Traceability Log

## Test
- Entry Deliverables
  - Unit Code
  - (UAT) Evaluation Criteria
  - (UAT) Traceability Log

- Exit Deliverables
  - (UAT) Evaluation Criteria
  - (UAT) Traceability Log
  - (UAT) Authorization

## Release
- Entry Deliverables
  - Unit Code
  - (UAT) Authorization
  - (UAT) Evaluation Criteria

- Exit Deliverables
  - (UAT) Evaluation Criteria
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# PROJECT insight
- Initiate Project Intelligence

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# QAassist Integrated Methodology

## Initiating Phase
- **Business Case**
  - Detailed Business Req's
- **Project Charter**
  - Project Plan
  - Project Schedule/WEB
  - Roles & Responsibilities
  - Project Deliverables
  - Vendor Management Plan
  - Quality Assurance Plan
  - Project Procedures
- **All previously created PM deliverables**
  - Project Risk Definition
  - Project Plan
  - Project Scope Management
  - Project Change Request Log
- **Team Status Report**
  - Project Status Report
  - Unit Test (UT) Authorization
  - System Test (ST) Authorization
  - User Acceptance Test (UAT) Authorization

## Executing Phase
- **Systems Analysis**
  - Entry Deliverables
    - Business Case
    - Project Charter
    - Detailed Business Requirements
  - Exit Deliverables
    - High Level Solution Design
    - Requirements Traceability Log
- **Design**
  - Entry Deliverables
    - High Level Solution Design
    - Programming Specifications
    - Requirements Traceability Log
  - Exit Deliverables
    - Detailed Solution Design
    - Requirements Traceability Log
- **Build**
  - Entry Deliverables
    - Detailed Solution Design
    - Programming Specifications
    - Requirements Traceability Log
  - Exit Deliverables
    - Unit Code
    - Training & Support Plan
    - Requirements Traceability Log
- **Test**
  - Entry Deliverables
    - Unit Code
    - (UT) Evaluation Criteria
    - Requirements Traceability Log
  - Exit Deliverables
    - (UT) Test Log
    - (ST) Authorization
    - Requirements Traceability Log
- **Release**
  - Entry Deliverables
    - (ST) Authorization
    - (UAT) Evaluation Criteria
    - Requirements Traceability Log
  - Exit Deliverables
    - (UAT) Evaluation Criteria
    - Requirements Traceability Log

## Closout Phase
- **Project Closeout**
  - Project Closeout Report
# SDLC – Test Phase Deliverables

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### SDLC – Test Phase Deliverables

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## SDLC – Test Phase Deliverables

### QAssist Integrated Methodology

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**Note:**
- (UT) - Unit Test
- QAssist 2014

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### SDLC – Test Phase Deliverables

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**PROJECTinsight**<br>Initiate Project Intelligence®
# QAassist Integrated Methodology

## Initiate
- Business Case
- Detailed Business Req's

## Plan
- Project Charter
- Project Plan
- Project Schedule
- Roles & Responsibilities
- Project Deliverables
- Config Management Plan
- Quality Assurance Plan
- Project Procedures

## Execute & Control
- All previously created PM deliverables
- Project Risk Def
- Project Risk Log
- Project Status Report
- Issue Log
- Project Change Request Def
- Project Change Request Log

## Closeout
- Team Status Report
- Project Status Report
- Unit Test (UT) Authorization
- System Test (ST) Authorization
- User Acceptance Test (UAT) Authorization

## Systems Analysis
- Entry Deliverables
  - Business Case
  - Project Charter
  - Detailed Business Req's
  - Exit Deliverables
  - High Level Solution Design
  - Requirements Traceability Log

## Design
- Entry Deliverables
  - High Level Solution Design
  - Requirements Traceability Log
- Exit Deliverables
  - Detailed Solution Design
  - Programming Specifications
  - Requirements Traceability Log

## Build
- Entry Deliverables
  - Detailed Solution Design
  - Programming Specifications
  - Requirements Traceability Log
- Exit Deliverables
  - Unit Code
  - Training & Support Plan
  - Requirements Traceability Log

## Test
- Entry Deliverables
  - Unit Code
  - Test Plan
  - UT Evaluation Criteria
  - Requirements Traceability Log
- Exit Deliverables
  - UT Evaluation Criteria
  - UT Test Log

## Release
- Entry Deliverables
  - Unit Code
  - STT Authorization
  - Requirements Traceability Log
- Exit Deliverables
  - STT Evaluation Criteria
  - STT Test Log

## Software Development

## Software Testing
## QAIassist Integrated Methodology

### Initiate
- Business Case
- Detailed Business Requirements
- User Stories
- Project Charter
- Project Plan
- Project Schedule
- Roles & Responsibilities
- Project Deliverables
- Config Management Plan
- Quality Assurance Plan
- Project Procedures

### Plan
- All previously created PM deliverables
- Project Risk Definition
- Project Risk Log
- Project Scope Definition
- Project Scope Log
- Project Change Request Definition
- Project Change Request Log

### Execute & Control
- Team Status Report
- Project Status Report
- Unit Test (UT) Authorization
- System Test (ST) Authorization
- User Acceptance Test (UAT) Authorization

### Closeout
- Project Closure

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### Systems Analysis

### Design
- Entry Deliverables
  - Business Case
  - Detailed Solution Design
  - High-Level Design

### Build
- Entry Deliverables
  - Detailed Solution Design
  - Programming Specifications
  - Requirements Traceability Log

### Test
- Entry Deliverables
  - Unit Code
  - Training & Support Plan
  - Requirements Traceability Log

### Release
- Entry Deliverables
  - Unit Code
  - UT Authorization

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QAIassist Integrated Methodology

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Project Management

Systems Analysis

Design

Build

Test

Release

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# QAlassist Integrated Methodology

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Executing Projects with IT Methodologies

Agenda

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- Tutorial Context and Review - Sample Project Definition
  - Project Initiation (Feb 2014)
  - Project Planning and Design (Apr 2114)
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- Software Development Lifecycle (SDLC) - deliverables
- Recap
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**QAIassist 2014**
# QAIassist Integrated Methodology

## Initiate
- Business Case
- Detailed Business Requirements

## Plan
- Project Charter
- Project Plan
- Project Schedule
- Roles & Responsibilities
- Project Deliverables
- Configuration Management Plan
- Quality Assurance Plan
- Project Procedures

## Execute & Control
- All previously created PM deliverables
- Project Risk Management
- Project Risk Log
- Project Procedure
- Project Issue Log
- Project Change Request Definition
- Project Change Request Log

## Closeout
- Team Status Report
- Project Status Report
- Unit Test (UT) Automation
- System Test (ST) Evaluation Criteria
- User Acceptance Test (UAT) Authorization

## Systems Analysis
- Entry Deliverables
  - Business Case
  - Detailed Business Requirements

## Design
- High Level Solution Design
- Detailed Solution Design
- Programming Specifications
- Report's Traceability Log

## Build
- Entry Deliverables
  - Unit Code
  - Training & Support Plan
  - Report's Traceability Log

## Test
- Entry Deliverables
  - Unit Test (UT) Evaluation Criteria
  - UT Test Log
  - Unit Test (UT) Authorization

## Release
- Entry Deliverables
  - Unit Test (UT) Evaluation Criteria
  - ST Test Log
  - ST Authorization
  - Report's Traceability Log
QAIassist Integrated Methodology

Project Management

Initiate
- Business Case
- Detailed Business Req's

Plan
- Project Charter
- Project Plan
- Project Schedule/WEB
- Roles & Responsibilities
- Project Deliverables
- Change Management Plan
- Quality Assurance Plan
- Project Procedures

Execute & Control
- All previously created PM deliverables
- Project Risk Register
- Project Risk Log
- Project Issues Log
- Project Change Request Definition
- Project Change Request Log

Closeout
- Team Status Report
- Project Status Report
- System Integration Test
- User Acceptance Test (UAT) Authorization
- Project Closeout

Systems Analysis

Design

Build

Test

Release

Software Development

Entry Deliverables
- Business Case
- Detailed Business Requirements

Exit Deliverables
- High Level Solution Design
- Requirements Traceability Log

Entry Deliverables
- High Level Solution Design
- Programming Specifications
- Requirements Traceability Log

Exit Deliverables
- Unit Code
- Training & Support Plan
- Requirements Traceability Log

Entry Deliverables
- Detailed Solution Design
- Programming Specifications
- Requirements Traceability Log

Exit Deliverables
- Unit Code
- Test Documentation
- Requirements Traceability Log

Entry Deliverables
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- Programming Specifications
- Requirements Traceability Log

Exit Deliverables
- Unit Code
- Test Documentation
- Requirements Traceability Log

Entry Deliverables
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Exit Deliverables
- Unit Code
- Test Documentation
- Requirements Traceability Log

Entry Deliverables
- Detailed Solution Design
- Programming Specifications
- Requirements Traceability Log

Exit Deliverables
- Unit Code
- Test Documentation
- Requirements Traceability Log

Software Testing

Entry Deliverables
- Business Case
- Detailed Business Req's

Exit Deliverables
- High Level Solution Design
- (UAT) Evaluation Criteria

Entry Deliverables
- High Level Solution Design
- Testing Strategy

Exit Deliverables
- (SIT) Plan
- (SIT) Evaluation Criteria

Entry Deliverables
- High Level Solution Design
- Testing Strategy

Exit Deliverables
- (UT) Plan
- (UT) Evaluation Criteria

Entry Deliverables
- High Level Solution Design
- Testing Strategy

Exit Deliverables
- (UAT) Plan
- (UAT) Evaluation Criteria

Entry Deliverables
- High Level Solution Design
- Testing Strategy

Exit Deliverables
- (UAT) Plan
- (UAT) Evaluation Criteria

Entry Deliverables
- High Level Solution Design
- Testing Strategy

Exit Deliverables
- (UAT) Plan
- (UAT) Evaluation Criteria
# QAlassist Integrated Methodology

## Initiate
- Business Case
- Detailed Business Req's
- Project Charter

## Plan
- Project Plan
- Project Scheduling
- Roles & Responsibilities

## Build
- Design
  - Entry Deliverables:
    - High Level Solution Design
    - Programming Specifications
  - Exit Deliverables:
    - Unit Test
      - UAT Evaluation Criteria

## Test
- Design
  - Entry Deliverables:
    - Detailed Solution Design
    - Programming Specifications
  - Exit Deliverables:
    - Unit Test
      - UAT Evaluation Criteria

## Execute & Control
- Project Status Reports
- Change Request Definitions
- Issue Log

## Closeout
- Project Closure
- Final Deliverables

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# QAIassist Integrated Methodology

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## Systems Analysis

- **Entry Deliverables**
  - Business Case
  - Detailed Business Requirements

## Design

- **Entry Deliverables**
  - High-Level Solution Design
  - Requirements Traceability Log

## Build

- **Entry Deliverables**
  - Detailed Solution Design
  - Programming Specifications
  - Requirements Traceability Log

## Test

- **Entry Deliverables**
  - Unit Code
  - Training & Support Plan
  - Requirements Traceability Log

## Release

- **Entry Deliverables**
  - Unit Code
  - (UAT) Testing Log

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**QAIassist 2014**
Executing Projects with IT Methodologies

Agenda

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- Recap
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How many requirements (and associated functionality) should/can be developed?

- Too Few – leads to a solution that does not satisfy the business need
- Too Many – leads to a solution that is over priced, over built, over budget and past due (and may still not satisfy the business need)

How can a project team know when they are leveraging an SDLC to develop the appropriate level of functionality?
Software Development Lifecycle
Functionality – multiple definitions

Identifying, Designing, Building and Unit Testing functionality

**** Functionality cannot be delivered in a vacuum  ***

- **Manual Functionality**
  - Processes that deliver or administer the delivery of products and/or services
    (often leverage automated functionality)

- **Automated Functionality**
  - IT Systems/Applications that interface and support the delivery of Manual Functionality
Software Development Lifecycle
Requirements/Functionality – Nomenclature

- Generic Cohesion
  - “Data” and “Process” exist – a correlation exists between them
  - “Data” identifies and defines the information that will be utilized by the application to satisfy the business need
  - “Process” defines how the “Data” will be leveraged to satisfy the business need

- Data
  - Subject – highest level definition of user requirement - correlation with “System”
  - Topics – breakdown of “Subject” - correlation with “Sub-Systems”
  - Entities - breakdown of “Topics” - correlation with “Functions”

- Process
  - System – highest level “process” – correlation with “Subject”
  - Sub-System(s) – breakdown of “System” – correlation with “Topics”
  - Function(s) – breakdown of “Sub-Systems” – correlation with “Entities”
How can a project team know when they are developing the appropriate level of functionality?

- **Extended Accounting System**
  - Approved Projects
  - Payroll
  - Human Resources
  - Selected Candidates
  - Accounts Payable
  - Potential Candidates
  - Candidate Assessment
  - Procurement

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Executing Projects with IT Methodologies

**Agenda**

- IT Methodology Context - general terminology, “noun” and “verb”, hierarchy (noun), deliverable construct/format, depictions, integration
- Tutorial Context and Review - Sample Project Definition
  - Project Initiation (Feb 2014)
  - Project Planning and Design (Apr 2114)
- Software Development Lifecycle (SDLC) - objectives, context, integrations, scope definition
- Software Development Lifecycle (SDLC) - deliverables
- Recap
## QAlassist Integrated Methodology

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### Software Development

- **Systems Analysis**
- **Entry Deliverables**
  - Business Case
  - Detailed Business Requirements
  - Exit Deliverables
    - High Level Solution Design
    - Detailed Solution Design
    - Exit Deliverables
      - Programming Specifications
      - Requirements Traceability Log

### Software Testing

- **Entry Deliverables**
  - Business Case
  - Detailed Business Requirements
  - Exit Deliverables
    - High Level Solution Design
    - Detailed Solution Design
    - Exit Deliverables
      - Requirements Traceability Log

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The High Level Solution Design deliverable is used to define the boundaries of the application to be delivered. The High Level Solution Design illustrates the data and process flows, the high level functionality to be incorporated into the application, the sub-subsystems and functions required to satisfy the business needs of the application, and the standards to be applied in developing the application.
SDLC – System Analysis Phase
High Level Solution Design Deliverable

- Authored by: Architect or Business Analyst
- Reviewed by: Project Deliverable Review Board
- Approved by: Business Manager & Project Manager (in lieu of Project Owner)
- Status: “Draft”
- Depiction: see Project Schedule
- Associations:
  - Design Phase of the Software Development Lifecycle
  - System Analysis Phase of the Software Testing Lifecycle
- View Sample Deliverable
SDLC - System Analysis Phase Deliverables (exit)

- **High Level Solution Design (exit)**

  Reference – Extended Accounting System (Data & Process)

  - Approved Project
  - Resource Requirements Functionality
  - Potential Candidates Functionality
  - Selected Candidates Functionality
  - Accounts Payable Functionality
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**QAIassist Integrated Methodology**

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Initiate
- Business Case
- Detailed Business Req's
- Project Charter
- Project Plan
- Project Schedule
- Roles & Responsibilities
- Project Deliverables
- Config. Management Plan
- Quality Assurance Plan
- Project Procedures

Plan
- Project Risk: Definition
- Project Risk: Log
- Project Status Report
- Project Issue Log
- Project Change Request Definition
- Project Change Request Log

Execute & Control
- Team Status Report
- Project Status Report
- Unit Test (UT) Authorization
- System Test (ST) Authorization
- User Acceptance Test (UAT) Authorization

Closeout
- Project Closeout

Systems Analysis
- Entry Deliverables
  - Business Case
  - Detailed Business Requirements
- Exit Deliverables
  - High Level Solution Design
  - Requirements Traceability Log

Design
- Entry Deliverables
  - High Level Solution Design
  - Requirements Traceability Log
- Exit Deliverables
  - Detailed Design
  - Requirements Traceability Log

Build
- Entry Deliverables
  - Detailed Solution Design
  - Programming Specifications
  - Requirements Traceability Log
- Exit Deliverables
  - Unit Code
  - Training & Support Plan
  - Requirements Traceability Log

Test
- Entry Deliverables
  - Unit Code
  - Evaluation Criteria
  - Requirements Traceability Log
- Exit Deliverables
  - (UT) Test Log
  - (ST) Test Log
  - (UAT) Authorization

Release
- Entry Deliverables
  - Unit Code
  - Evaluation Criteria
  - Requirements Traceability Log

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Software Development

Software Testing

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# QAIassist Integrated Methodology

## Initiate
- Business Case
- Detailed Business Requirements
- Project Charter
- Project Plan
- Project Schedule/WBS
- Roles & Responsibilities
- Project Deliverables
- Config Management Plan
- Quality Assurance Plan
- Project Procedures

## Plan
- Project Risk Management Plan
- Project Budget
- Project Timeline
- Project Change Request Definition
- Project Change Request Log

## Execute & Control
- Team Status Report
- Project Status Report
- Unit Test (UT) Authorization
- System Test (ST) Authorization
- User Acceptance Test (UAT) Authorization
- Project Closeout

## Closeout
- Project Closeout

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### Systems Analysis
- Entry Deliverables:
  - Business Case
  - Project Charter
  - Detailed Business Requirements
  - Exit Deliverables:
    - Requirements Traceability Log

### Design
- Entry Deliverables:
  - High Level Solution Design
  - Requirements Traceability Log
- Exit Deliverables:
  - Detailed Solution Design
  - Programming Specifications
  - Requirements Traceability Log

### Build
- Entry Deliverables:
  - Unit Code
  - Training & Support Plan
  - Requirements Traceability Log
- Exit Deliverables:
  - Unit Test (UT) Plan
  - Unit Test (UT) Execution Criteria
  - Requirements Traceability Log

### Test
- Entry Deliverables:
  - Code Review
  - Test Plan
  - Test Execution Criteria
  - Requirements Traceability Log
- Exit Deliverables:
  - Test Evaluation Criteria
  - Test Report
  - Requirements Traceability Log

### Release
- Entry Deliverables:
  - Code Review
  - System Evaluation Criteria
  - Requirements Traceability Log
- Exit Deliverables:
  - System Test (ST) Plan
  - System Test (ST) Authorization
  - Requirements Traceability Log

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Software Development Lifecycle
Requirements Documentation – Traceability

- User Requirements can originate from anywhere at any time throughout the SDLC
  - User Function
  - User Business Rule
  - Standard
  - System Design
  - High Level Solution Design
  - System
  - Sub-System
  - Function
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**SDLC – System Analysis Phase Deliverables**

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SDLC – Systems Analysis Phase Deliverables (exit)

- **Requirements Traceability Matrix/Log (exit)**
  
  Used to ensure all user defined requirements are documented and incorporated into the application/system. It acts as the repository for all user requirements - it can be referenced and crosschecked to ensure all user requirements have been incorporated into the application before it is released into the production environment.

- **View Sample Deliverable**
# SDLC - System Analysis Phase Deliverables

## System Analysis
- **Entry Deliverables**
  - Business Case
  - Project Charter
  - Detailed Business Requirements
- **Exit Deliverables**
  - High Level Solution Design
  - Reqmt's Traceability Log

## Design
- **Entry Deliverables**
  - High Level Solution Design
  - Reqmt's Traceability Log
- **Exit Deliverables**
  - Detailed Solution Design
  - Programming Specifications
  - Reqmt's Traceability Log

## Build
- **Entry Deliverables**
  - Detailed Solution Design
  - Programming Specifications
  - Reqmt's Traceability Log
- **Exit Deliverables**
  - Training & Support Plan
  - Reqmt's Traceability Log

## Test
- **Entry Deliverables**
  - Unit Code
  - (UT) Evaluation Criteria
  - Reqmt's Traceability Log
- **Exit Deliverables**
  - (UT) Defect Log
  - (UT) Authorization
  - Reqmt's Traceability Log

## Release
- **Entry Deliverables**
  - Unit Code
  - (UT) Plan
  - (UT) Evaluation Criteria
  - Reqmt's Traceability Log
- **Exit Deliverables**
  - Unit Code
  - (UT) Authorization
## SDLC – Design Phase Deliverables

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### SDLC – System Analysis Phase Deliverables

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SDLC - Design Phase Deliverables (exit)

**Detailed Solution Design**

*Detailed Solution Design* deliverable(s) are an extension of the *High Level Design* deliverable - each function defined in the *High Level Solution Design* design is further clarified with a separate and unique *Detailed Solution Design* deliverable. Each and all of the specific functions necessary to deliver the business requirements are identified and documented. Each of the *Detailed Solution Design* deliverables address the necessary (operational, administrative, technical) requirements to be incorporated into the application, the application program/modules that will provide that functionality, and the interfaces with other application functions.

**View Sample Deliverable**

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SDLC - Design Phase Deliverables (exit)

- **Programming Specifications**

  *Programming Specification* deliverable(s) are an extension of the *Detailed Solution Design* deliverables - each program/module defined in a *Detailed Solution Design* deliverable is further clarified as a unique *Programming Specification* deliverable. Each *Programming Specification* deliverable defines the purpose and context for the program/module, the environment it will operate in, and the detailed design to be incorporated into the program/module. The *Programming Specification* deliverables act as the basis for developing the code for the application.

- **View Sample Deliverable**
## SDLC – System Analysis Phase Deliverables

### System Analysis
- **Entry Deliverables**
  - Business Case
  - Project Charter
  - Detailed Business Requirements
- **Exit Deliverables**
  - High Level Solution Design
  - Reqmt's Traceability Log

### Design
- **Entry Deliverables**
  - High Level Solution Design
  - Reqmt's Traceability Log
- **Exit Deliverables**
  - Detailed Solution Design
  - Programming Specifications
  - Reqmt's Traceability Log

### Build
- **Entry Deliverables**
  - Unit Code
  - Training & Support Plan
  - Reqmt's Traceability Log
- **Exit Deliverables**
  - Unit Code
  - Training & Support Plan
  - Reqmt's Traceability Log

### Test
- **Entry Deliverables**
  - Unit Code
  - (UT) Plan
  - (UT) Evaluation Criteria
  - Reqmt's Traceability Log
- **Exit Deliverables**
  - Unit Code
  - (UT) Plan
  - (UT) Evaluation Criteria
  - (UT) Defect Log
  - (UT) Authorization
  - Reqmt's Traceability Log

### Release
- **Entry Deliverables**
  - Unit Code
  - (UT) Plan
  - (UT) Evaluation Criteria
  - Reqmt's Traceability Log
- **Exit Deliverables**
  - Unit Code
  - (UT) Plan
  - (UT) Evaluation Criteria
  - (UT) Authorization
  - Reqmt's Traceability Log

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## SDLC – System Analysis Phase Deliverables

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*QAlassist Integrated Methodology*

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## SDLC – System Analysis Phase Deliverables

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Unit Code

Programming Specification(s) are used to develop the application code. The code will incorporate the technical standards and all the necessary functionality as defined by the business requirements for each program/module.
### SDLC – System Analysis Phase Deliverables

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SDLC – Build Phase Deliverables (exit)

- **Training & Support Plan**
  
  This deliverable provides the description of how the end users are going to be trained in using the final application/product and the support they will receive once the application has been made operational. It specifies the methods of training, the required curriculum, the course content to be delivered, and mechanisms used to deliver the training.

- **View Sample Deliverable**
## SDLC – System Analysis Phase Deliverables

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SDLC – System Analysis Phase Deliverables

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  - Detailed Business Requirements
- **Exit Deliverables**
  - High Level Solution Design
  - Reqmt’s Traceability Log

**Design**
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- **Exit Deliverables**
  - Detailed Solution Design
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  - Reqmt’s Traceability Log

**Build**
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  - Reqmt’s Traceability Log

**Release**
- **Entry Deliverables**
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  - (UT) Authorization

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SDLC – System Analysis Phase Deliverables

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### QAassist Integrated Methodology

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Gantt Chart

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SDLC – Test Phase Deliverable (entry)

- **Unit Test Plan (from STLC)**

  *Unit Test (UT) Plan* deliverables (one per program/module) define how all of the unit testing activities are to be executed prior to the application/product being migrated into the System Integration Test environment. It identifies the testing tasks to be completed in the UT environment, the testing standards to be applied within the UT environment, the testing tools to be used, the testing deliverables to be completed, and the standards used to define the UT evaluation criteria.

- **View Sample Deliverable**
# QAassist Integrated Methodology

<table>
<thead>
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- **Test**
  - Entry Deliverables
  - Unit Code
  - (UT) Test Log
  - (UT) Authorization
  - Exit Deliverables

- **Release**
  - Entry Deliverables
  - Unit Code
  - (UT) Authorization
  - Exit Deliverables

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Unit Test Evaluation Criteria (from STLC)

*Unit Test Evaluation Criteria* deliverables (one per program/module) are used to document the "expected" Unit Test evaluation criteria prior to conducting the Unit Testing. The Unit Test criteria is used to evaluate "expected" results versus "actual" results. Functionality that "passes" the UT tests is ready to be migrated to the System Integration Test (SIT) environment. Functionality that "fails" these Unit tests is recorded and requires further activity from the project team.
Unit Test Defect Log (from STLC)

*Unit Test (UT) Defect Log* is used to document and monitor all of the "failed" tests against the *Unit Test Evaluation Criteria* deliverable. Each "failed" test is assessed and communicated to the project team who are required to make the necessary changes to rectify the "failed" test.

View Sample Deliverable
Requirements Traceability Matrix/Log (exit)

Used to ensure all user defined requirements are documented and incorporated into the application/system. It acts as the repository for all user requirements - it can be referenced and crosschecked to ensure all user requirements have been incorporated into the application before it is released into the production environment.

View Sample Deliverable
### SDLC – System Analysis Phase Deliverables

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<td>(UT) Defect Log</td>
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<td>(UT) Authorization</td>
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SDLC – System Analysis Phase Deliverables

**System Analysis**
- Entry Deliverables
  - Business Case
  - Project Charter
  - Detailed Business Requirements
- Exit Deliverables
  - High Level Solution Design
  - Reqmt’s Traceability Log

**Design**
- Entry Deliverables
  - High Level Solution Design
  - Reqmt’s Traceability Log
- Exit Deliverables
  - Detailed Solution Design
  - Programming Specifications
  - Reqmt’s Traceability Log

**Build**
- Entry Deliverables
  - Detailed Solution Design
  - Programming Specifications
  - Reqmt’s Traceability Log
- Exit Deliverables
  - Unit Code
  - Training & Support Plan
  - Reqmt’s Traceability Log

**Test**
- Entry Deliverables
  - Unit Code
  - (UT) Plan
  - (UT) Evaluation Criteria
  - Reqmt’s Traceability Log
- Exit Deliverables
  - (UT) Defect Log
  - (UT) Authorization
  - Reqmt’s Traceability Log

**Release**
- Entry Deliverables
  - Unit Code
  - (UT) Defect Log
  - (UT) Authorization

**Software Development**

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Integrated Methodology
Unit Test Authorization (for PMLC)

The Unit Test Authorization deliverable signifies the "approval" that all project coding, deliverables and work products have satisfied the required Unit Test Evaluation Criteria and can be migrated to the System Integration Test (SIT) environment. Approval of the Unit Test Authorization deliverable ensures all appropriate items are placed under proper configuration management and can be used as the initial basis for performing the next (SIT) level of testing.

View Sample Deliverable
2013 “Tutorials” Schedule

- The 3rd Wednesday of Month (Feb, Apr, Jun, Aug, Oct)
  - 8:00 am Pacific - 11:00 am Eastern Time

- IT Methodology Tutorials (45 mins)
  - Applying IT Methodology to Project Initiation - (Feb)
  - Project Planning & Design with IT in Mind - (Apr)
  - Executing Projects with IT Methodologies - (Jun)
  - Project Control & Verification - (Aug)
  - Project Close & Delivery - (Oct)
2013 “Concepts” Schedule

- The 3rd Wednesday of Month (Jan, Mar, May, Jul, Sept, Nov)
  - 8:00 am Pacific - 11:00 am Eastern Time

- IT Methodology Concepts (60 mins)
  - Methodology for the IT Landscape - (Jan)
  - Apply PM Fundamentals to IT - (Mar)
  - Leverage the Software Development Lifecycle - (May)
  - Explore the Software Testing Lifecycle - (Jul)
  - Incorporate Organizational Process Governance - (Sept)
  - Implementing IT Methodology - (Nov)
Body of Knowledge

- Methodology/Lifecycle/Deliverables – [www.qaiassist.com](http://www.qaiassist.com)
  - Project Management, Software Development, Software Testing

- Body of Knowledge (Library) – [www.qaiassist.com](http://www.qaiassist.com)
  - **Methodology Origin** – origins of methodology – identifies the differences between the path we take (noun) and how we proceed (verb) down that path
  - **Context & Overview** – provides a general overview of IT Methodology and how it can be applied within an organization
  - **Deliverable Descriptions** - provides general descriptions for all the deliverables of the QAIassist Integrated Methodology
Until Next Session...

- **Keep Posing your Questions** – call or send your questions in (Janelle and/or Cameron)
- **Explore the QAlassist Body of Knowledge** – refer to the QAlassist Body of Knowledge (sample deliverables, whitepapers, blog articles) – (www-qaiassist.com)
- **QAlassist Practitioner** - find out more about becoming a certified QAlassist Practitioner
- **Tell your friends** - tell your friends, coworkers and colleagues about the Project Insight/QAlassist webinars – invite them to join us at the next session
- **Continuing Follow Up** – send out a survey at the completion of every webinar, follow up with attendees to obtain their suggestions and recommendation
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