Fermilab

Computing Sector (CS)

Project Management Lite Guidelines

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DocDB #

Project Management Lite Guideline Revision Log

Revision	Description	Effective Date
0.1	Initial Draft.	05/21/14
1.0	Updated with Project Planning Reference Guide links and approved for use in SCD.	5/24/14

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I. Introduction

A. *Scope and Purpose*

The Computing Sector undertakes a large number or projects, ranging from short-term, low-cost projects to multi-million dollar projects involving many stakeholders.

We believe in completing projects that deliver the planned value, on time and within budget, by applying project management practices and principles at a level that facilitates successful completion without excessive burden and overhead.

Our vision is to put into place a Project Management Program that helps project managers to more effectively plan, manage and execute their projects, and measure their results.

The scope of the Project Management Lite Guidelines is to provide information on the Project Management process, tools, and techniques that should be used by a person serving in the role of a Project Manager (PM) for Small and Medium sized Computer Sector projects at Fermilab. Large and Portfolio Projects Guidelines may be found in the Project Planning Reference Guide along with other project management tool.

The PM Lite approach is a tailored methodology that provides tools that can be used in managing small and medium sized projects.

With exception of a Project Charter for medium sized projects, none of these tools are specifically required in the implementation of a small or medium sized project, but are available to assist the project team in the planning, management, and execution of their goals.

This document covers the use of the following project tools:

- Project Charter
- Requirements Document
  - o Functional Requirements
  - o Technical Requirements
- Work Breakdown Structure (WBS)/Project Schedule
- Level-1 Deliverable
- Level-1 Milestone Table
- Risk, Action and Issues Log
- Project Decision Documents
- Service Management Change Requests for ITIL Projects and Programs
- Project Change Requests (RFCs)
- Status Reports
- Meeting Minutes/Agenda
- Lesson Learned
- Project Closeout

This guide can also be used by line managers and other resources to stay informed about how project management will be conducted at Fermilab, as well as to learn more about the process, tools, and techniques that will be used to manage Small and Medium Sized Projects.

B. Intended Audience

The intended audience of the Project Planning Reference Guide is any line manager or any person that is an acting PM for any Computer Sector projects at Fermilab. The PM can be someone that this is their daily role or someone that has been assigned as a PM to manage the project.

C. Project and other Work Definitions

Projects are one-time, temporary endeavors that are undertaken to create a unique product, service, or result. More specifically, it is a temporary organization, with people and other assets required to achieve an objective or other outcome, such as implementing a new system; implementing a module, upgrade, or improved functionality in an existing system; or shutting down an old system. Each Project has a lifecycle that typically includes Discovery, Plan and Analyze, Design, Build, Test and Final Prep, and Deliver and Stabilize.

A Project in the Computing Sector at Fermilab is any non-standard work effort that will consume at least 100 hours of effort. Service Requests, Incidents, Maintenance, Defects, and Enhancements may give rise to a project but are typically not projects in and of themselves. Projects may entail the Release of a hardware or software change, but Releases may also be the result of other, non-project works.

The following table describes the various Work Definitions of different types of work.

Work Type	Definition	Example	Process Used
Service Request	A simple request for information, a standard move, add, change, or for access to a service. Time & Resources are known/predetermined	Adding a user/users; reset a password; MAC request	Service Request Management
Incident	Identified flaw or failure in current functionality or performance. Application that 'worked before, but doesn't work now.	User has loss of or impaired service; a configuration change	Incident Management
Maintenance	Activities or costs associated with the ONGOING UPKEEP of operational applications of information technology. Maintenance includes correcting flaws, optimizing existing systems or applications, responding to minor changes in specified user requirements, renewal of equipment maintenance agreements, and meeting normal workload increases using substantially the same equipment, facilities, personnel, supplies and software	Patches, system upgrades (minor or major), routine work	Operational Procedures
Defect	A reported problem requiring a solution that can be planned.	A Bug logged in Redmine or Defect reported in Service Now.	Operational Procedures

Work Type	Definition	Example	Process Used
Enhancement	Delivers new (or upgraded) functionality to an existing system	Creating a report which cannot be created by the users; enhancements would be determined by a business need.	Operational Procedures
Release	A set of changes to a software program. A release may be as simple as a bug fix or as complex as a major change to an application based on a project.	A set of code changes as managed in Redmine, Service Now or equivalent.	Operational Procedures
Project	A temporary organization, with people and other assets required to achieve an objective or other outcome, such as implementing a new system; implementing a module, upgrade, or improved functionality in an existing system; or shutting down an old system. Each Project has a lifecycle that typically includes Discovery, Plan and Analyze, Design, Build, Test and Final Prep, and Deliver and Stabilize.	Implementing a new system; implementing a module, upgrade, or improved functionality in an existing system; shutting down an old system	Project Management
Program	A set of related projects that align to the same strategic goal. These tend to be significant efforts over 20,000 hours.	Major Initiative	Portfolio Management

D. Project Categories

Within the Computer Sector projects will into one of four categories: Portfolio, Large, Medium and Small. The sizing for category is somewhat subjective. The following table summarizes the approximate boundaries for these categories; managers should review their project proposals against the following criteria and determine where their project best fits.

Category	Small	Medium	Large	Portfolio
Effort	100 – 500 hours	500 – 5,000 hours	5,000 – 15,000 hours	>15,000 hours
Duration	< 1 Month	1 - 6 Months	6 - 12 Months	> 12 Months
Costs	< $25K	$25K-$249K	$250K-$1M	>$1M
Sponsorship	Anyone	Business Department	Business Owner	Senior Lab Management
Scope (functional areas)	Single functional area	Two functional areas	3-4 functional areas	> 4 functional areas
End User Impact	<100	100 - 1,000	1,000 - 2,000	Laboratory Wide
Project Coordination	All work can be accomplished within one group in Services	Requires coordination among two groups within Services	Requires coordination among three groups within Services	Requires coordination among four or more groups within Services
Technology Complexity	Simple tasks, performed routinely	Complex/involved tasks, performed frequently	Simple tasks, no experience	Complex/involved tasks, no experience; or involves systems changes that cannot be backed out
Business Need	Operations can still function at normal levels	Operations functioning, but can improve	Operations able to maintain current levels using extra resources and/or inefficient means	Operations immediately & severely affected
Impact	Business as usual with existing processes, systems, or resources	Requires changes to existing processes and/or system modifications	Requires deployment of, changes to investments in capital equipment, systems, and/or extensive staff training/re-training	Requires changes to systems architecture, and/or new or supplemental staff and/or implementing new system, replacing system
Methodology Used	PM Lite	PM Lite	Deliverables selected from Methodology at the project onset, using the Project Deliverable Lifecycle Chart) appropriate for the project. See PMO for additional information and training.	Deliverables selected from Methodology at the project onset, using the Project Deliverable Lifecycle Chart) appropriate for the project. See PMO for additional information and training.

II. Project Planning

As Projects are identified, the person designated to manage the Projects should look at the recommended tools for the size of their project based on the RACI Chart. The RACI Chart is a simplified subset of the Project Lifecycle Deliverable Chart (PLDC) from the Project Planning Reference Guide.

The Small and Medium sized project tools are included and the responsible persons/groups are also depicted along with the phase of the project that they are typically used in and the type of deliverable that the tool is. As previously stated, with exception of a Project Charter for medium sized projects, none of these tools are specifically required in the implementation of a small or medium sized project, but are available to assist the project team in the planning, management, and execution of their goals

RACI CHART FOR SMALL AND MEDIUM PROJECTS											
Deliverable	Recommended for	Phase	Type of Deliverable	Project Sponsor	Project Coordinator/ Manager	Technical Lead	Service Owner	Project Team	Steering Committee	Management Advisory Team	Key Stakeholders
Charter (including ROM budget, if needed)	Medium	Definition	Required	A	R	C	C	C	I	I	I
Project Schedule	Small and Medium	Planning	Recommended	I	R	A	C	C	I	I	
Level 1 Deliverables	Small and Medium	Planning	Recommended	I	R	A	C	C	I	I	I
Level 1 Milestone Table	Small and Medium	Planning	Recommended	I	R	A	C	C	I	I	I
Functional Requirements	Small and Medium	Planning	Recommended	I	R	A	C	C	I	I	C
Technical Requirements	Small and Medium	Planning	Recommended	I	R	A	C	C	I	I	C
Risk, Action,Issues	Medium	Planning	Recommended	I	R,A	R	C,I	R,C	I	I	I
Project Decision Documents	Medium	Planning	Optional	C,I	R	R,A	C,I	C	C,I	C,I	C,I
Service Management Change Requests (RFCs)	Small and Medium	Planning	*	I	A	R	C	C	I	I	
Project Change Request (PCR)	Medium	Execution	Recommended	A	R,A	R	C	C	C	I	I
Status Report	Medium	Execution	Recommended	I	R,A	C	I	I	I	I	I
Meeting Minutes/Agenda	Medium	Execution	Optional	I	R,A	R,C	I	I	I	I	I
Lessons Learned	Medium	Closeout	Recommended	I	R,A	C	C	C	C,I	I	I
Project Close Out	Medium	Closeout	Optional	I	R,A	C	I	I	I	I	I

Optional

RACI Legend

R= Responsible - The person who is ultimately responsible for delivering the project and/or task successfully. Complete work to achieve task.

A= Accountable -The person who has ultimate accountability; they are the person to whom "R" is accountable. Sign off or approve.

C=Consulted -Someone whose input adds value and/or buy-in is essential for ultimate implementation. Subject Matter Expert.

I=Informed-The person or groups of individuals who need to be notified of results or actions taken.

* ITIL Projects and Programs must utilize, otherwise Optional

III. Small and Medium Sized Project Checklist

A Project Checklist was created to step project teams through the process of documenting projects. The checklist provides a brief explanation for items in the RACI Chart and contains links to documentation templates for each item. It is available on line at https://sharepoint.fnal.gov/cd/sites/pm/Shared%20Documents/Template%20-%20Small%20and%20Medium%20Project%20Checklist.docx and is reproduced here.

The PMO's Project Planning Reference Guide provides more details on items contained in the Project Checklist (if needed). Additional tools from the Project Lifecycle Deliverable Chart (PLDC) can also be used as needed; the RACI list should provide more than enough tools for most Small and Medium sized projects.

Small and Medium Sized Project Checklist
☐ **Develop a Project Charter.**
A Project Charter is a roadmap for the project and provides the project direction; it also acts as an agreement between the Project Sponsor and the Project Team. A Charter identifies the overall scope of the project by defining the objectives, deliverables, customers and stakeholders, time frame, and project organization. There is a template that can be used if desired. The template contains 8 sections that allow the Project Sponsor to work with the Project Manager and Technical Lead to define the high level objectives of the project, expectations, "who's who" and reporting requirements.
1.   Project Purpose/Background
2.   Project Scope
3.   Project Objectives
4.   Project Deliverables
5.   Project Customers
6.   Project Stakeholders
7.   Project Time Frame
8.   Project Budget
9.   Project Acceptance Criteria
10.   Flexibility Matrix
11.   Project Organization
11.1.   Project Team
11.2.   Responsibilities
12.   Project Reports
Value: The Project Charter ensures that management and the project team are working towards the same objectives with the same constraints and within the defined resources.
Location of a sample document template: *https://sharepoint.fnal.gov/cd/sites/pm/Shared%20Documents/Template%20-%20CD%20Project%20Charter.docx*

☐ **Develop a Project Schedule.**
A project schedule or work plan helps define deliverables and due dates for the scope of work. A good work plan at a minimum usually includes sections for:
1. Planning (charter, requirements, resources, costs, risks, and change management)
2. Execution (development of deliverables)
3. Delivery (roll out and release management for utilization of the deliverables)
4. Project Closeout (lessons learned and closeout)
The project schedule or work plan can be kept in Microsoft Project, Microsoft Excel, or any equivalent means that allows updates and sharing.
Value: The Project Schedule ensures that the project team has a concrete plan for working towards the agreed to Deliverables. It also allows the project team and management to evaluate progress as work is accomplished.
Location of a sample document template:
https://sharepoint.fnal.gov/cd/sites/pm/Shared%20Documents/Template%20-%20CD%20Project%20Schedule.mpp

☐ **Determine Level 1 Deliverables and Milestones.**
Level 1 Deliverables and Milestones are the high level tasks with on the overall scope of work. These milestones should be extracted from the Requirements and Project Work Plan. A Gantt Chart may be included to visually display milestone dates in a linear fashion.
Value Statement: Level 1 Deliverables and Milestones are important for project tracking and give the ability for managers to see how the project is progressing from a "big picture" perspective.
Location of a sample document template:
https://sharepoint.fnal.gov/cd/sites/pm/Shared%20Documents/Template%20-%20Level%201%20Deliverables%20With%20Gantt%20Chart.xlsx

Define Functional and Technical Requirements.

The requirements for a project define the deliverables and need to be determined and documented. Requirements typically come in three types: high-level, functional, and technical. A template exists for documenting requirements that can be used. It is comprised of:

I.	Executive Summary
II.	Requirements Summary
III.	Assumptions, Risks, Dependencies
IV.	Out of Scope
V.	Performance and Key Success Metrics
VI.	Use Cases
VII.	Detailed Functional and System Requirements
VIII.	Detailed Business Process Flow Diagrams
IX.	Reports
X.	Stakeholders
XI.	Project Team

The user may modify this template as needed or come up with their own document to utilize.

Value Statement: The Requirements Document is critical to ensure that a project will meet its business and functional objectives. This document is the roadmap of what the project "must" do rather than how it will be done.

Location of a sample document template:
https://sharepoint.fnal.gov/cd/sites/pm/Shared%20Documents/Template%20-%20Requirements%20Document.docx

Create Risk, Action and Issues Log.

The Risk, Action and Issues Log is a spreadsheet that is used to identify, document, categorize, and possibly calculate risk values and to tracks actions and issues. Risk characteristics such as the level of impact and probability of occurrence, provide status, indicate owners, and mitigation strategies for all project risks may be included.

Value Statement: The Risk, Action and Issues Log provides a summary for the project team and management to easily compile, track and manage the risks, actions and issues pertaining to a project.

Location of a sample document template:
https://sharepoint.fnal.gov/cd/sites/pm/Shared%20Documents/Template%20-%20Project%20Management%20Workbook.xlsx

Create Project Decisions Documents (as needed).

The Project Decision Document may be used to document major decisions made.

Value Statement: When big decisions are made, often there is no record of exactly what was decided. The Decision Document can serve to be that record and provide clarity if questions later arise.

Location of a sample document template:
https://sharepoint.fnal.gov/cd/sites/pm/Shared%20Documents/Template%20-%20Decision%20Document.docx

Create Service Management Requests For Change (RFCs)
Systems, programs and project that are under ITIL required that RFCs under Service Management be done for all projects and any subsequent changes to projects. An initial RFC must be done in the planning phase of the project and in the execution phase these must be done for PCRs. This is option for non-ITIL systems, programs and projects.
Value Statement: The Service Management RFC ensures that changes made to documented systems are done in a controlled and approved manner to allow continued certification under ISO standards.
Location of a sample document template:
Not applicable. (verify)

Create Project Change Request (as needed).
Changes to a project that can impact scope, schedule, resources and/or costs must be approved by the pertinent stakeholders. This form or equivalent can be used to track those changes.
Value Statement: The Change Request Form allows project changes to be approved and tracked in order to maintain a record of changes and to document those changes in order to ensure new deliverables, scope or schedules are accomplished.
Location of a sample document template: *https://sharepoint.fnal.gov/cd/sites/pm/Shared%20Documents/Template%20-%20Project%20Change%20Request%20Form.docx*

Determine format and periodicity for status reporting
Status reports keep the project team and management informed as to the status of a project as it progresses. The leadership team should specify in the Project Charter as to how often these reports be made and in what format. The sample below is a Fermilab-wide standard and should in most cases be used unless directed otherwise. A current copy of the report should be stored along with all the dated copies for dashboard use.
Value Statement: Status reporting allows a means for the projects to communicate with management and to their project teams in a standardized fashion that is easily read and reviewed.
Location of a sample document template: *https://sharepoint.fnal.gov/cd/sites/pm/Shared%20Documents/Template%20-%20Status%20Report.docx*

Publish meeting agendas and minutes for all meetings (as needed).
Meetings flow more smoothly when planned out ahead of time with the agenda published in advanced. Meeting minutes ensure that the results of the meeting are documented and then can be reviewed by the entire team for use going forward.
Value Statement: A well run meeting saves time, effort and ensures the more effective utilization of the time of the attendees.
Location of a sample agenda document template: *https://sharepoint.fnal.gov/cd/sites/pm/Shared%20Documents/Template%20-%20Meeting%20Agenda.docx*
Location of a sample minutes document template: *https://sharepoint.fnal.gov/cd/sites/pm/Shared%20Documents/Template%20-%20Meeting%20Minutes.docx*

☐ Compile Lessons Learned.
Lesson Learned documentation allows for the project team to record the successes and pitfalls they encountered during the accomplishment of a project. It becomes a useful record to assess successes and failures and can serve as a future learning tool.
Value Statement: We often do projects that relate to projects accomplished in the past. By defining and documenting the lessons learned, future projects can learn from the experience of your project.
Location of a sample document template:
https://sharepoint.fnal.gov/cd/sites/pm/Shared%20Documents/Template%20-%20Lessons%20Learned.docx
☐ Close Out Project on completion.
Sometimes it is useful to create a summary of the work towards the deliverables and the accomplishments of a project. The Project Close Out template provides a means to disclose what accomplishments there where, outstanding risks and other data that may be useful to operations when the project is live and in use by Lab users. The template contains:
1. PROJECT ABSTRACT
2. PROJECT DOCUMENTATION
3. SUPPORTING DOCUMENTATION
4. REASON FOR CLOSING THE PROJECT
5. PROJECT DELIVERABLES
6. PROJECT SCHEDULE
7. PROJECT TEAM
8. BUDGET AND FINANCIAL INFORMATION
9. OUTSTANDING RISKS
10. OPERATIONS AND SUPPORT
11. NEXT STEPS
12. LESSONS LEARNED
The Project Team can modify this as needed to record the project end data and information.
Value Statement: As with Lessons Learned, the Closeout Document can provide a good historical record and means for future projects to learn from the accomplishment of other related projects.
Location of a sample document template:
https://sharepoint.fnal.gov/cd/sites/pm/Shared%20Documents/Template%20-%20CS%20Project%20Close-Out%20Report.docx

IV.   Project Management Lite Tool Overview

This section provides more details for utilizing the various elements that together constitute the Project Management Lite Tools. The tools are created by the project manager and team on an as-needed basis as the project progresses through the project life cycle. Those elements can be created at almost any time in the planning phase, but at a minimum should follow the order as listed in the RACI hart and this section. The Project Manager may need to modify the elements included in tools that he or she decides to use the based on the project specific needs.

A. Develop Project Charter

The first critical document and sign-off point for any project is the Project Charter, also known as the "Charter". A Charter is a roadmap for the project and provides the project direction; it also acts as an agreement between the Project Sponsor and the Project Team. A Charter identifies the overall scope of the project by defining the objectives, deliverables, customers and stakeholders, time frame, and project organization. To learn more in depth details about the Project Charter and how to create one for a project, please see Section IV: Project Charter of the Project Planning Reference Guide.

Before the Charter can be considered complete, it should be reviewed by the Project Sponsor and the necessary changes should be made to the Charter. The final step in the Development of the Charter is to gain sign-off by the necessary stakeholders.

B. Develop Requirements Document

Once the Charter is complete and approved, the requirements for the project will need to be determined and documented. The Requirements Document is critical to ensure that a project will meet its business and functional objectives. This document is the roadmap of what the project "must" do rather than how it will be done. Requirements typically come in three types: high-level, functional, and technical. To learn more in depth details about Requirements and/or how to create the Requirements Document for a project, please see Section V: Requirement Document of the Project Planning Reference Guide.

C. Create Work Breakdown Structure (WBS) and Schedule Including Milestones

Once the Requirements and Acceptance Criteria have been identified, the creation of the Work Breakdown Structure (WBS) can begin. The creation of the WBS is the first step in the planning process. The WBS can best be described as defining "what" needs to be done on the project.

The creation of the WBS takes the Project Scope and starts to break it up into smaller and more manageable pieces. The primary objective of the WBS is to identify specific areas of work, work products, and/or deliverables. After the work is broken down into smaller pieces, the individual task (or activities) list should be started. This list will be used to develop the Schedule. To learn more in depth details about creating a WBS, please see Section VIII: Work Breakdown Structure (WBS) of the Project Planning Reference Guide.

The second step in planning is to create the project Schedule. A Schedule can best be described as defining "when" the work will be done, "how" long it will take to get the work done, and "who" will complete the work. Some people call a Schedule a Project Plan, but that usage in incorrect. They are not the same thing. However, a schedule is the same thing as a "workplan".

It is a good idea and best practice to work with managers for the required resources to determine the activities, dependencies, durations, and effort. That serves several purposes, but mainly to make sure all bases are covered as well as to gain buy-in to the schedule.

The following steps should be followed when developing a Schedule:

1. Define Work Activities
2. Define Level-1 Milestones
3. Define Level-2 Milestones and beyond (if desired)
4. Sequence Activities
5. Identify Activity Resources
6. Estimate Activity Durations
7. Estimate Activity Effort

To learn more in depth details about a Schedule, the steps to create a Schedule, and/or any of the items discussed in the section, please see Section IX: Schedule of the Project Planning Reference Guide.

D. *Develop Risk, Action and Issues Log/Register*

A factor in effective project management is to be proactive in planning for risks by using techniques and procedures to anticipate problems and reduce risk. Tracking them along with Action Items and other Project Issues can help in staying on top of problems and working through their resolution. The Risk, Action and Issues LogRegister is a spreadsheet that is used to identify, document, categorize, calculate values such as the level of impact and probability of occurrence, provide status, indicate owner, and mitigation strategies for all project risks. To learn more in depth details about a Risk Register, Mitigation Strategies, and/or other information on risks, please see Section XII: Risk Register , Section XXIII: Action Item List and Section XXIV: Issues Log of the Project Planning Reference Guide.

E. *Service Management Change Requests for ITIL Projects and Programs*

Service Management Change Requests are submitted via Service Now for projects and programs governed by ITIL. To learn more in depth details about Service Management Change Requests, please see CS Document 3530-v3 Fermilab Change Management Process and Procedures.

F. *Define Project Change Control Process*

If project scope is not properly specified and changes to that scope are not controlled, changes to the scope could result in a loss of control, budget overruns, missed deadlines, and project objectives not being met. The purpose of a Project Change Control Process is to provide a means in which to manage such changes and should include the change and the impact to project budget, scope, and schedule. This process is also called Change Control. The Project Manager will use a Change Control Log to track all of the project changes. To learn more about the Project Change Control Process, please see Section XVIII: Project Change Control .

G. *Define Status Reporting Process*

A critical part of project management is to communicate the overall health of a project at periodic intervals, usually weekly, to the key stakeholders, including the project sponsor and key management in a clear and concise manner. The purpose of a Status Reporting Process is to provide the vehicle in which to do this communication. The Status Report includes information on

the project progress, budget, and schedule status and to bring to management's attention areas requiring their intervention or action. This report should be as brief and to the point as possible. To learn more in depth details about Status Reporting please see Section XX: Status Reporting of the Project Planning Reference Guide.

H. Utilize Decision Log

On a project several decisions are made and some of them critical decisions for how to proceed; a useful tool for tracking those decisions is the Decision Log. The Decision Log is used to track all decisions made on the project, as well as who made them and on what date. This tool will provide a historic record of such decisions so that it is easier to locate that information in the future. To learn more in depth details about how to create and use a Decision Log, please see Section XXII: Decision Log of the Project Planning Reference Guide.

I. Use Meeting Minutes/Agendas

During the course of a project several meetings are conducted and the use of meeting minutes is critical to track what was discussed in each meeting. The meeting minutes should document all decisions made in the meeting, actions items assigned in the meeting, and any other information that was covered that would be good to document. To learn more in depth details about how to create and use Meeting Minutes, please see Section XXV: Meeting Minutes of the Project Planning Reference Guide.

J. Conduct Lessons Learned

At the end of a project it is a good idea to host a lessons learned meeting for the project team that will allow them a chance to talk about the project in terms of what went well, what did not go so well, what could have been done better, etc. These lessons learned are documented for use by future projects. To learn more in depth details about how to host a lessons learned meeting and create lessons learned meeting notes, please see Section XXVI: Lessons Learned of the Project Planning Reference Guide.

K. Conduct Project Closeout

At the end of a project it is also a good idea to summarize the results of a project and to show the final costs and deliverables. If any risks are outstanding they would be identified here for management review and further action along with operations and support issues.   To learn more in depth details about how to host a lessons learned meeting and create lessons learned meeting notes, please see Section XXVII: Project Closeout of the Project Planning Reference Guide.

V.   Medium Sized Project Example

This section provides an example of how the Project Management Lite Approach is being used in Scientific Computing. The SAM Oracle to PostgreSQL Database Migration was planned for 2014 to eliminate the use of Oracle in order to potentially save licensing costs and to allow wider use of SAM by Fremilab and external users who would otherwise be encumbered by Oracle licensing.

A. Planning the Project

The project best-fit size to a Medium sized project. It was estimated at 6 FTE months over about one calendar year. No funding was required outside of laboratory manpower. Coordination between SCD and DBAs was required.

Prior to developing this as a Project, a short document estimating the scope of the work had been created which:

- Defined high level tasks
- Provided estimated LOE
- Defined most of the requirements

B. Implementing the Project

The SAM team was assigned a project manager and evaluated the available tools. First, they developed a Project Charter to define scope, deliverables, project team, and resources using the Project Charter template. This was developed from the original document that had been created as a proposal for the project and with discussions by the project team.

Next,, the team produced a Requirements document that was approved by stakeholders to define the requirements using Project Requirements template.

As the requirements were being developed, the Project Manager and Technical lead created a project plan to define the WBS and project tasks. This was done in Project but then was exported to Excel for use by the team. PDF versions were also used by team members.

The team meets weekly on the project internally and presents status to the CD Project Meeting on a monthly basis using Project Status report template.

The weekly team meetings run using a standard agenda from the PMO templates.

The Project Manager is tracking Issues and action items in a spreadsheet similar to the templates.

C. Results of Utilization of the Project Management Lite Approach

Using a few standard tools enabled the team to better function and formally define the work that they already had captured in their minds.

The use of just a few PMO Template tools enables them to track and display progress, keep their management informed, and remain better organized overall without creating a lot of extra, extraneous work.