IAM Project Management Processes

July 2013

Contents

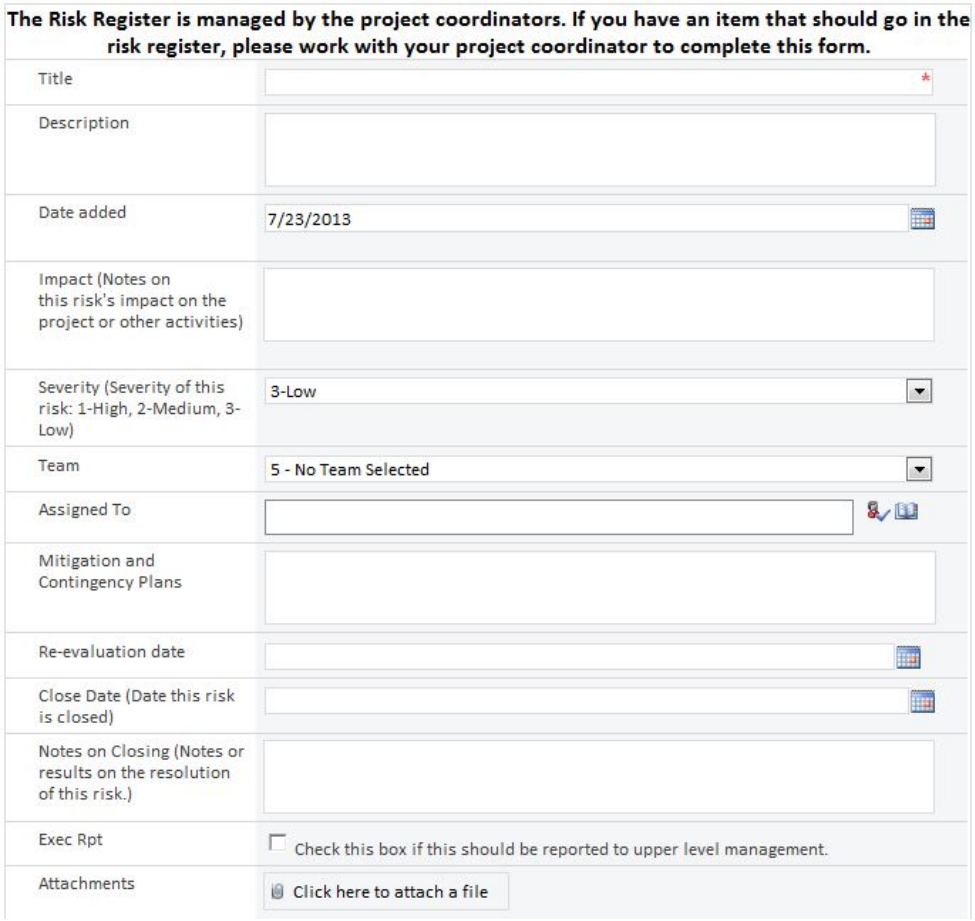
Risk management

Description: The Risk Register is managed by the project coordinators. The project coordinators work with their team or team's stakeholders to complete the risk form and are responsible for following up on them as determined by the re-evaluation date. Risks are reviewed during the weekly project status meeting on an as needed basis.

Process owner:

Review and update cycle: Updated once a month on the 7th of each month. Reviewed on an as needed basis during the weekly project status meeting.

Risk Register:
https://intranet.uillinois.edu/departments/aits/AW/ITPC0375/Lists/Risk%20Register/AllRisks.aspx



The Risk Register is managed by the project coordinators. If you have an item that should go in the risk register, please work with your project coordinator to complete this form.

Title	*
Description	
Date added	7/23/2013
Impact (Notes on this risk's impact on the project or other activities)	
Severity (Severity of this risk: 1-High, 2-Medium, 3-Low)	3-Low
Team	5 - No Team Selected
Assigned To	
Mitigation and Contingency Plans	
Re-evaluation date	
Close Date (Date this risk is closed)	
Notes on Closing (Notes or results on the resolution of this risk.)	
Exec Rpt	Check this box if this should be reported to upper level management.
Attachments	Click here to attach a file

Subteam task management and action items

General action items: There are no general action items, action items will be assigned to a specific subteam and that team will be responsible for tracking and completing them in their own team's tracking system (in most cases this is SmartSheet).

An initial view of the action item list will be performed by PM/CRM team and all action items will be doled out to the appropriate subteam for their own management.

Implementation team task management and allocation: Each week Becky reviews the project schedule, general action item list in SmartSheet, the issues list in SharePoint. Based on the schedule and her conversations with Peter Herrig, she makes adjustments and assignments in the IT task list in Smart Sheet. The IT members are given their assignments during the weekly IT meeting. In addition, Becky updates status for each assignment based on the information gathered during the weekly meeting. Changes to ETC's, % complete, assignments, allocations, tasks, and estimated finish dates are fed back to Daryl for updating in the master schedule.

PM/CRM team task management: During the Friday morning PM/CRM team meeting, the PM/CRM SmartSheet action items are updated. Any items that should be assigned to a subteam are also assigned at that time to that team. Changes to the schedule will be a made as necessary.

Technical team task management and allocation: Each week, Christina and Marla will review the project schedule, tech team task list (SmartSheet), issues/risks in SharePoint, and any additional lists that need reviewing as well such as the workflow status sheet and replanning list. This will happen prior to the weekly technical team meeting on Thursday to build the agenda based off of questions and items that need additional follow up and/or assignment. Christina will provide updates to Daryl as needed based off of these meetings.

Functional team task management and allocation: Each week, Butch, Deb and Noni have a planning meeting to review the functional team internal tasks list and assignments, ensuring each task is appropriately assigned to the right team member(s). Noni cross-references the project schedule, noting any discrepancies in dates and tasks. Deb reviews general action item list in SmartSheet and updates Daryl on a regular basis (can be weekly, or several times a week depending on the updates). The Functional team members are given their assignments during the weekly Functional team meeting. Sometimes, when we mention of a task needing to be completed, we get volunteers based on expertise and availability. In addition, Deb or Noni updates status for each task based on the information gathered during the weekly meeting. Changes to ETC's, % complete, assignments, allocations, tasks, and estimated finish dates are fed back to Daryl for updating in the master schedule.

Issue management

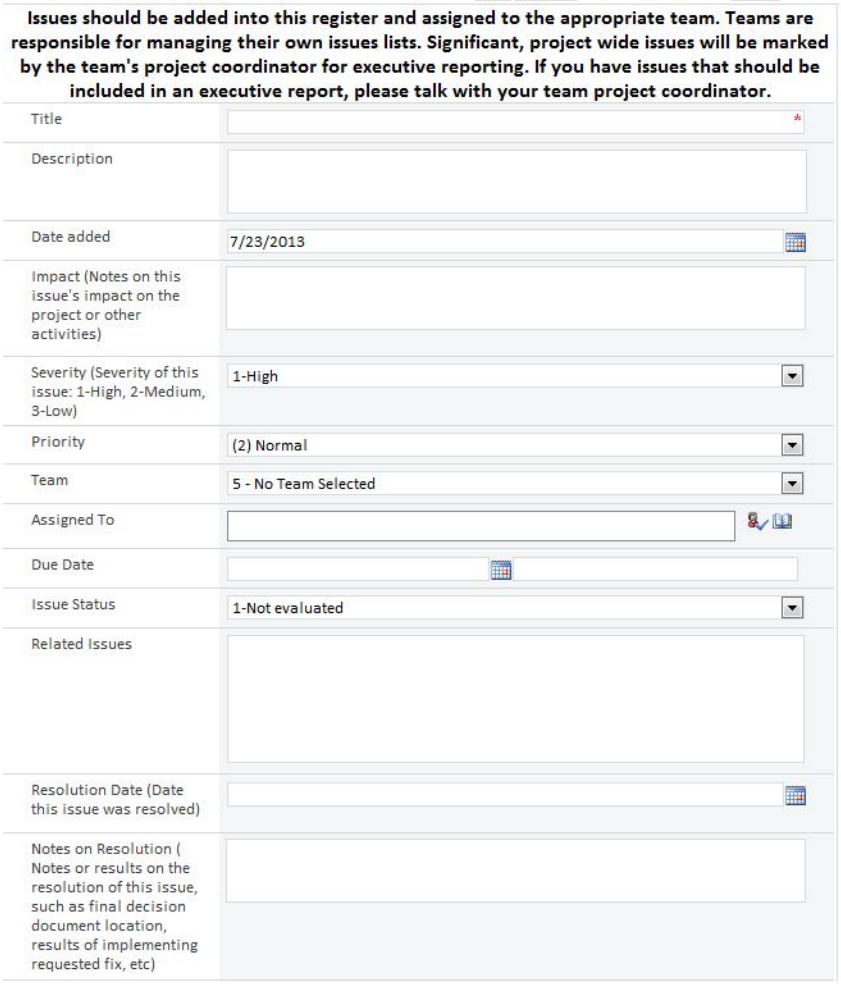
Description: The Issue Register is a single place for issues for the IAM project. Issues can be added by any IAM Project Team Member. Each subteam is responsible for adding and managing their own issues and assigning them to their team and an individual. Subteam level issues can be discussed on an as needed basis during the "Other Topics" section of the project status meeting.

Significant, project wide issues will be marked by the team's project coordinator for executive reporting. These types of issues will be managed by the IAM project team and reported to IAM governance bodies and stakeholders. Project issues are reviewed during the weekly project status meeting.

Process owner:

Review and update cycle: Updated continuously and reviewed once a week during the IAM PM/CRM team meeting. Quality reviews done once a month on the 7th of each month. Top 5 issues are reported weekly to the IAM Project Leadership team and are published in the Weekly Sentinel (some of which is used to update the web page once a month).

Issues Register:
https://intranet.uillinois.edu/departments/aits/AW/ITPC0375/Lists/Issues/AllItems.aspx



Issues should be added into this register and assigned to the appropriate team. Teams are responsible for managing their own issues lists. Significant, project wide issues will be marked by the team's project coordinator for executive reporting. If you have issues that should be included in an executive report, please talk with your team project coordinator.

Title	*
Description	
Date added	7/23/2013
Impact (Notes on this issue's impact on the project or other activities)	
Severity (Severity of this issue: 1-High, 2-Medium, 3-Low)	1-High
Priority	(2) Normal
Team	5 - No Team Selected
Assigned To	
Due Date	
Issue Status	1-Not evaluated
Related Issues	
Resolution Date (Date this issue was resolved)	
Notes on Resolution (Notes or results on the resolution of this issue, such as final decision document location, results of implementing requested fix, etc)	

Project status meetings

Description: Project status meetings are held once a week for 1.25 hours. Details on this and other recurring meetings are available in the Recurring Meetings Overview document in the Meeting Agenda and Notes document library.

Process owner: Cynthia Cobb

Review and update cycle: The format and invitees for this meeting will be evaluated once a year.

Subteam coordination

Description: Each subteam of the IAM project has a dedicated project coordinator. The project coordinator is responsible for all aspects of project management as it applies to their subteam and works closely with the subteam lead. The project coordinator responsibilities include (but are not limited to):

- Ensure tasks are assigned and all resources are booked with work for the next 2 months
- Plan the work for their subteam. Ensure that the project schedule (tasks, resources, assignments, estimates, deadlines) is updated with that work
- Ensure the quality of team meetings
- Manage subteam tasks and issues
- Coordinate work with other project coordinators and subteams
- Help ensure quality and consistency of work
- Provide a central point of communication out from and into their subteam.

Subteam assignments:

- Technical Team: Marla McKinney Team Lead, Christina Vann Project Coordinator
- Implementation Team: Peter Herrig Team Lead, Becky McNaught Project Coordinator
- Functional Team: Deb Coggins Team Lead, Becky McNaught Project Coordinator

Process Owner: Cynthia Cobb

Review and update cycle: Assignments and responsibilities will be reviewed once a year.

Change requests

Description: Changes that will impact budget, scope, and schedule require the completion of an IAM Project Change Request Form. Project coordinators will work with their sub teams or sub team stakeholders to complete the project change request form and and usher it through the change request process. After a change request and impact analysis is complete, the IAM Project Manager will determine the appropriate approval path for the change.

Once a change is approved the following steps are followed to include the work package into the project schedule:

1. **Details:**

   We would suggest adding a short amount of time to our Monday afternoon IAM Project Status Meeting to ask the group if there has been any work identified in the past week that may need to be completed and is not currently represented in the IAM schedule. If it is determined that there is work that needs to be added, the following process should take place:

   a. Determine what the initial scope of work is thought to be

   b. The Functional Team will take lead on the work and kickoff any meetings needed. If there is not a functional team member that is available to start this work, resources from the technical team can be placed as the lead as appropriate. The assigned lead will gather and coordinate with the appropriate person(s)/team(s) to do analysis of the work to take place if necessary (i.e. does it involve a change to a current process or the addition of functionality to existing systems/processes?)

   c. Based on the analysis, we are then able to refine the scope of work and include this in the requirements document that will be created along with such information as where the work originated, what we are trying to solve with adding it, and why it needs to be done.

   d. Typically, once the analysis is complete and the scope is refined, the functional team will be asked to begin developing their requirements first with technical involvement as needed.

   e. Once functional requirements are complete, the document would then be handed off to the technical and implementation teams to add their requirements.

   f. After we have completed the proper analysis and defined the scope and requirements, we will then estimate and schedule the work and add it into the schedule. We will also add this work to the change log in order to keep a running list of the work that we add.

2. **Result:**

   By implementing the above process, we will be better able to control the scope of the project, ensure that all parties are aware of any work that is added, and maintain a consistent process for analyzing, scoping, and developing clear requirements for what is to be done.

Process Owner: Christina Vann

Review and Update Cycle: Change requests are reviewed briefly each week during the project status meeting. Important change requests will be posted in the IAM Web Site starting in Fall 2013.

Change request log and form:
https://intranet.uillinois.edu/departments/aits/AW/ITPC0375/Change%20Requests/Forms/AllItems.aspx

Chg #	Type	Name	Brief Description	Change Status	Priority	Modified	Date Added	Deadline / Target Date	Completion Date	Notes on Completion / Results	Exec Rpt?
1		Emergency SMS Alert - Project Change Request	Change request for emergency SMS alert pages in Courion.	1-Not Evaluated	1-Critical	7/16/2013 2:47 PM	7/16/2013	7/19/2013			No
		Project Change Request Form	This is the form to use for a new change request. Please upload a completed version of this form to this Document Library and take care to complete all of the SharePoint Document Fields as they will help us track the status of this request.	4-N/A	5-N/A	5/8/2013 2:50 PM					No

Excerpt of the form:

Project/Software Change Request Form Change request number

Project number and name, or Application name:	Sample Project
Date submitted:	
Change initiator & contact info:	
Change sponsor & contact info:	
Project manager/analyst & contact info:	

The following section is to be completed by the customer requesting the change.

Change type:
- ○ Project budget
- ○ Project quality
- ○ Project schedule
- ◉ Project scope
- ○ Software design change
- ○ Software new requirement
- ○ Software requirement change
- ○ Other

Change reason:
- ◉ Customer request
- ○ Legal
- ○ Performance
- ○ Other

Change Impact:
- ○ Critical - cannot move forward without this change
- ○ Necessary - change is required, but is not time-critical
- ○ Nice to have - no adverse impact if change is not made

Requested completion date:	
Title of change:	
Description of business problem:	
Impact of NOT implementing the change, and alternatives.	
Describe how the system should behave:	
Detailed requirements for requested change:	

The following section is to be completed by the Technical Team.

Estimate to complete:	Customer hours	Analyst hours	Developer hours	Tester hours	**Total hours**
Planning					**0**
Analysis					**0**
Design					**0**
Construction					**0**

Decisions

Description: Decisions are made following the **Decision Making Process** as outlined by the IAM Functional Team. Completed and upcoming decisions are recorded in the **Decisions Log**.

The Decisions log is populated from the following sources:

- Functional Team Decision Documents – Deb Coggins has written up some documents using a template for decisions that have been made, to be discussed, or pending. There's a link from Decisions folder in SP to these documents.
- IAM Steering Team Committee agendas and notes
- IAM Executive Sponsorship Group agendas and notes
- Project schedule
- Weekly review during project status meetings

Process Owner: Daryl Fritchey

Update and review cycle:

- Decision log: As decisions are identified in one of the above sources, the process owner collects all the relevant data and updates the internal log by the next status meeting. On the 7th of each month, the CRM team pulls the data for external completed and upcoming decisions and updates the IAM web page. Before this, a thorough review is done by the process owner the internal decisions log to ensure the data is in good shape. Once a quarter, the process owner reviews the schedule new decisions are added to support new work packages or our improved understanding of the work ahead.
- Decision making process: Changes to the decision making process will be made as needed, with a full review occurring once a year.

Decision log and process:

Internal decision log and the decision making process document are in the IAM SharePoint Workspace under Shared Documents / Decisions.

The external views of our decision log are here: Completed Decisions and Upcoming Decisions.

Project Schedule Guidelines

The following are the guidelines used to create and will be used to maintain the overall project schedule.

Deliverables and tasks

Each task in the project schedule has a related deliverable that can be checked off. This information is stored in the IAM Deliverables field. Deliverables vary for each task. Common deliverable types are:

- an entire document
- a portion of a document or an updated section of a document
- a meeting scheduled and completed
- a review and approval session complete
- or a decision document created and approved

The deliverables and tasks for each work package are based on the SDLC, conversations with team leads, and Nyle's IAM document structure proposal. (please see attached for Nyle's documentation).

Below are two examples of the structure of the project schedule:

Task Name	IAM Work Package	IAM When is this complete?	IAM Deliverables
EAS and EAS Admin Changes	EAS		
EAS Changes - Analysis and Scope	EAS	This is complete when an initial analysis and proposed scope is created for EAS Changes.	EAS Changes Scope Proposal
EAS Changes Use Cases	EAS	This is complete when the relevant use cases are complete for EAS changes and put into the Use Case document	Use Case document
EAS Changes Functional Requirements	EAS	This is complete when the Functional Requirements for EAS Changes is complete and it has been approved and reviewed by the relevant stakeholders	EAS Changes Scope Proposal; High Level Requirements Matrix
EAS Changes Detailed Requirements	EAS	This is complete when the Detailed Requirements Document is completed for EAS Changes	Detailed Requirements document for EAS Changes
EAS Changes Application Design Documentation	EAS	This is complete when the relevant sections in the ADD are updated with the EAS information	Application Design Documentation
EAS Changes Communication Activities		[	

EAS Changes App. Design Stakeholder review & approval	EAS	This is complete when the ADD is reviewed and approved by relevant stakeholders and it is ready to be handed off the the appropriate developer or the vendor.	Application Design Documentation
MS: EAS Changes ARD Complete	**EAS**	**Analysis, Requirements, and Design complete for EAS Changes**	

Summary tasks

Tasks in the project schedule will be organized by Release (Single ID/PW). Underneath these releases there will be the following structure:

Analysis, Requirements, and Design
- Work Package 1 (for example: EAS Admin)
- Work Package 2 (for example: IAM Service Console)

Build, Test, Deploy
- Work Package 1 (for example: EAS Admin)
- Work Package 2 (for example: IAM Service Console)

Each task has a work package field, which can be used to sort and order everything by work package.

As we get further along in our design tasks, it is likely that the Build, Test, Deploy sections will need to be restructured to accommodate additional components, or groupings of components.

Estimates

All tasks will have effort estimates with an associated level of confidence. Team leads are responsible for working with their team members to gather these estimates and providing them to their coordinators.

- Tasks with start or end dates in the next 3 months must have estimates with a High Level of confidence. A high level of confidence is assigned to those tasks that have had specific analysis done on them.

- Tasks with start or end dates in the next 3-6 months must have estimates with a Medium Level of confidence. A medium level of confidence are those tasks whose estimates are based on similar work on other projects.

- Tasks with start or end dates more than 6 months out can have estimates with a Low level of confidence.

Project schedule management

Description: The project schedule is reviewed and updated weekly. The following list contains the requirements for an updated schedule in MS Project.

1. All tasks in progress or scheduled to start in the next three months have an individual (not a role or generic resource) allocated.
2. 80% of tasks in the next 6 months have individuals assigned to them.
3. Resources and groups are consistent and complete. Duplicates do not exist and everyone is assigned the correct group.
4. Tasks with start dates in the past but that have not actually started can still be completed on time.
5. Closed tasks are marked closed, 100% complete, ETCs are zero.
6. ETCs and resource assignments have been updated for remaining work on tasks
7. Actual start and finish dates are updated and tasks are marked as on track. (See Update work on a project in MS Project help)
8. Percent complete is up to date for all tasks.
9. ETC's are checked in MS Project and updated in Clarity.
10. Tasks with complete dates in the next three months are still on track to be completed.
11. New tasks have been added / schedule changes made per last week's meeting notes
12. Critical flag is set appropriately
13. Milestones are set appropriately.
14. All tasks within the next 6 months have an associated deliverable assigned to it.
15. No overdue tasks.
16. There are no overallocations.
17. Change requests are reflected in the project schedule.
18. Tasks cannot be marked as complete until the related deliverable for that task is checked for completeness by the project team lead and the person that will be consuming the data.
19. Dependencies are up to date and a MS Project generated critical path view is useful.
20. The Work field is updated once a month at the summary task level *(pending final analysis)* with new estimated work. This value will be compared to the baseline.
21. Actual Work field is updated once a month at the summary task level *(pending final analysis)* with data from Clarity.
22. Each resource is assigned to an IAM Team in the IAM Team Membership field.
23. Each resource is assigned to an organizational group and department in the "Group" and "Dept" field.
24. The IAM Critical Path and Milestones fields are reviewed and checked each month.
25. The Task updated field is checked once all aspects of the task have been reviewed and updated.
26. Task type: Fixed duration for all *(pending final analysis)*
27. Resource assignment is at the second to last level for the Analysis, Requirements, and Design and the Build, Test, Deploy branches. Resource assignment is at the task level for the Prework and Decisions branches.
28. Only open tasks in Clarity that resources are currently working on.

Process Owner: Daryl Fritchey

Review and update cycle: Project schedule each week. Full project check up will be once a month prior to publishing on the web site. The project schedule is located in the project management document library in IAM Workspace.

Resource allocation

Description: Resource allocation is driven by the project schedule and the Project Team Lead/ Coordinator. The following is the set of resource allocation guidelines that were agreed to in July 2013 by the IAM Leads.

- IAM team members should generally be assigned to a single team
- IAM team leads assign their staff to their tasks in the project plan
- The tasks in the project plan, the required skill sets necessary, resource capacity, and priority will dictate assignment of staff
- IAM staff will need to work on tasks outside of their group tasks based on the nature of the tasks and skills required . When this occurs, assignment of tasks cross-team must be arranged via consultation between the team leads and project management
- Solid line direct reports control their team's resource allocation within and outside of the team's tasks
- Dotted line reporting must work through the primary lead to have resources assigned cross-team
- Where resource contention occurs, the relative priority of the work should weigh heavily on determining assignment
- Teams own the tasks in the project plan and specific people are assigned by team leads
- A team may request ongoing consultation / participation on tasks from another team (e.g. have someone from technical team participate on a specific requirements gathering session/topic)
- Tasks don't get done unless they are on the project plan. There will be subtasks that exist off-plan in more detail in some instances, but all material tasks should be reflected in the plan.
- Need to allocate against individuals/teams for production support to reduce capacity
- Need to understand the real capacity of team members for project work
- Dotted line relationships in the project organizational structure reflect ongoing coordination and communication responsibilities between teams and team leads

Process owner: Kelly Block

Review and update cycle: This document and the process will be reviewed once a year.

Project organization chart: Located in the project management document library at https://intranet.uillinois.edu/departments/aits/AW/ITPC0375/Project%20Management/IAM%20Teams.pdf

Budget management

Description: IAM project budget is maintained to provide the following data:

Process owner: Daryl Fritchey

Update and review cycle: This worksheet is updated once a month after the financial reports are distributed.

Budget worksheet: On a monthly basis, Cheryl Parrett prints off and provides a copy of the Detail Operating Ledger Statement of the previous month for the IAM Project. Any new charges/credits applied in the previous month are then input into the IAM_Large_Proj_Budget_Workbook document located in the IAM Sharepoint site within the Project Management Library. Figures within the spreadsheet are then more thoroughly reviewed on a quarterly basis to ensure the accuracy of the numbers and computations.

Resource planning

Description: Once a month, the IAM project management team will produce a **3 month view** of the expected resource needs for the IAM project. It will be sent to AITS Resource Managers as well as CITES, ITS, and ACCC Resource Managers. In addition, it will be distributed to the IAM project leadership and the IAM project team. The IAM Project Management Team is responsible for producing this forecast with the best data available to them at the time. This working document is designed to help identify and resolve resource issues.

AITS will review this document during their monthly scheduling meeting, and resource constraints will be resolved according to the AITS Internal In Flight Project Priorities. Other organizational resource constraints are expected to be resolved according to their own internal processes.

Issues that are identified will be actively pursued and resolved by the IAM Project Management Team. If there are substantive changes, the IAM Project Management Team will rerun and redistribute the report. Otherwise, changes will be reflected in the next resource forecast.

All tasks for the next three months will be assigned to individuals, not generic roles. For those tasks where it is unclear which person will work on the task, the most likely assignment will be made.

Quarterly resource assessments will be done by the project management team. The output of this will be an updated schedule and a long term resource view and assessment that will be emailed to the IAM project leadership and central IT organization resource managers.

Process owner: Cynthia Cobb

Review and update cycle: The three month view is produced once a month the week before the AITS MG meeting. The quarterly resource assessment report is done the first month of each quarter.

Resource assessment reports: Current resource assessments are in the project management document library in the IAM SharePoint workspace.

Testing processes

Description: The testing processes for IAM following the AITS SDLC methodology. The main activities and owners of each of these types of testing are outlined below:

- Acceptance testing for vendor delivered functionality (owner: Functional Team)
- Component testing (owner: Tech Team): In cases where other units are developing their own components, those units are responsible for component testing.
- Integration and system testing (owner: Tech Team)
- Performance testing (owner: Tech Team) The Functional Team provides the requirements, the Tech Team coordinates, and AITS QA executes these tests.
- Accessibility testing (owners: Functional Team for Courion delivered workflows and Tech Team for remaining functionality)
- Security (owner: Tech Team)
- User acceptance testing (owner: Functional Team)

Process Owner: Marla McKinney

Review and update cycle: This process will be reviewed once a year and updated if required.

Analysis, Requirements, Design processes

All work packages for the project must go through an analysis, requirements gathering, and design process. This process will guide the project estimations for development and implementation. The process owner is Marla McKinney.

Documents

- Templates for all documents are located in the IAM Active Workspace in the templates document library. https://intranet.uillinois.edu/departments/aits/AW/ITPC0375/Templates/Forms/AllItems.aspx

Document	Description	Created By	Process Use
End State Diagram	Single document that shows the major features of the system and how they are related. Document does not contain names of systems, hardware, or products – only high-level functionality. For IAM, this is a power point slide deck. It will be updated throughout the project.	Functional Team	• Used in communication of project goals, features, and functionality to stakeholders, clients, and external parties. • Used for definition of general scope of project.
Use Cases / Stories	High-level document that contains descriptions of events, and actions in business terms. Describes As-Is as well as corresponding To-Be Processes. Also indicates criticality of business process.	Functional Team through interviews and discussions with functional areas.	• Used by functional stakeholders to agree to core functions of system • Used to generate testing scenarios for system testing and User Acceptance Testing.
Functional Requirements	Specific requirements and business rules/logic that reflect a component of work that will be a feature of a release. Design components that are not user-visible will not necessarily be specified in this functional document.	Functional Team with help from Tech Team analysts and based on input from project team and stakeholders.	• Used by Technical Analysts to build Application Design Document. • Used by QA to build functional test cases. • Used to clarify and further document end state diagram.
Detailed Requirements	This is a new document created for the IAM project. This is may not be needed in all cases—Team lead will	Technical Team Analyst with help from Functional	• Used to get sign off from stakeholders. • Required for anything that we are building.

Document	Description	Created By	Process Use
	determine whether we need this by work package.	Analyst and Developer. Stakeholders will be determined by Technical and Functional leads.	
Application Design Document	Standard AITS technical requirements and design document that is part of SDLC.	Built by Technical Analyst in conjunction with the Developer.	• Used for development of custom components. • Used by QA for specific in test case development. • Lives on after completion of project to document component.

Analysis

The assigned lead for the effort will gather the appropriate team members that will be working on the effort throughout the analysis, requirements, and design processes. They will have a 30 minute to 1 hour kickoff session to determine stakeholders, scope of the work, what needs to be analyzed, and next steps. These next steps could be meetings with the stakeholders to determine as-is processes. Both functional and technical analysis will be conducted.

Any deliverables must be reviewed and signed off by stakeholders to assure the quality and scope of work. Deliverables can include:

- Use Cases / Stories
- Supporting process diagrams

Requirements

Functional Requirements: Depending on the type of work package, analysis and requirements gathering may happen at the same time. The use cases will be inputs to the requirements. The assigned lead will begin by gathering the functional requirements. Technical team resources will be involved to assess any technical requirements needed to match the functional requirements.

Any deliverables must be reviewed and signed off by stakeholders to assure the quality and scope of work. Deliverables will include:

- Functional Requirements Document (template in the IAM active workspace)

Detailed Requirements: Depending on the complexity of the work package or solution, this document may not be required. The technical lead will make this determination. This is completed by the Technical team using the artifacts created above and with input from functional analyst, stakeholders and project team members. This is sometimes done in conjunction with the Application Design Document (ADD).

Deliverables may include:

- Detailed Requirements Document (template in the IAM active workspace)

Design

The requirements documents will serve as inputs to the design process. Additional resources may be used to visually design elements if needed. The functional and technical team members will continue to design the new work and work with stakeholders to confirm the correct path.

Any deliverables must be reviewed and signed off by stakeholders to assure the quality and scope of work. Deliverables can include:

- Application Design Document (template in the IAM active workspace)
- Integration Overview Document (template in the IAM active workspace)
- Mock up diagrams
- Prototypes

Deployment and roll out coordination

To be determined.

Communication management

Description: The IAM Project team is talking to various campus constituents in different venues as part of the on-going IAM work. The IAM Communication Team will help facilitate project updates to the broader campus community and facilitate important specific messages to targeted University groups. We will assist the Campus IT CRM representatives with communications to their campus. The IAM Project Communications Plan can be found in SharePoint in the IAM Workspace under Shared Documents \ Communication Activities. For larger task communication efforts, we will create task specific communication plans (i.e. Conflict ID Communication Plan).

For general project information and news, we will maintain the IAM website (web.uillinois.edu/iam) and update it with relevant information as it occurs. We will write a monthly IAM update for dissemination of the past month's important activities. For planning purposes, we will have regular monthly meetings with the campus IT CRM folks to discuss current IAM topics and issues that need to be addressed. We will meet monthly with the expanded CRM team to discuss higher level IAM Communication concerns. Finally, to help facilitate project information dissemination, we will hold monthly meetings with CIO identified Stakeholders.

To track specific communications with customer groups, we will help maintain the Communications Log.

IAM Communication Team: Rachel Buller, Susan Flanagin and Mark Pollard

Campus IT CRM: Lauren Berceau (UIC), Kara McElwrath (UIS), Brian Mertz (UIUC) and Joe Yun (UIUC)

Expanded CRM Team: Bill Burton (UIC), Ginny Hudak-David (UA), Robin Kaler (UIUC) and Derek Schnapp (UIS)

Process owner: Mark Pollard

Review and update cycle: IAM communications needs will be addressed as they arise. We will meet monthly with the CRM team, the expanded CRM Team and the IAM Stakeholders. We will send out the IAM update monthly.

Links to the indicators information:

https://intranet.uillinois.edu/departments/aits/AW/ITPC0375/Shared%20Documents/Forms/AllItems.aspx?RootFolder=%2Fdepartments%2Faits%2FAW%2FITPC0375%2FShared%20Documents%2FCommunication%20Activities%2FCommunication%20Plan

Vendor management

To be determined

Project health monitoring

Description: The following set of health indicators and reports are generated to help identify issues and facilitate the required action or decision. Health indicator values are set for issues, decisions, resources, schedule, budget (effort), barriers, and upcoming go lives. In addition, a resource anticipated and actuals effort summary and project progress and resource tracking view are generated.

Process owner: Cynthia Cobb

Review and update cycle: Once a month these indicators are set and are published on the IAM web site. Additions and refinements to this set of information will be done on an as needed basis.

Links to the indicators information: The current indicators information is in draft form in the project management document library in the IAM Workspace. A link to the public web page will be provided when it is available.

Project status reporting

Description: The IAM project produces a status sheet called the IAM Weekly Sentinel which is used for all project status meetings. This document includes a high level timeline, current subteam focus, top five issues, decisions, upcoming roll outs, current tasks, and other topics for discussion. This report is designed to communicate the overall health of the project and current activities.

Once a month an Executive Project Briefing (aka IAM Status Sheet) is produced and published on the IAM Web Site. This document communicates upcoming milestones and reports on activities by team.

Process owner: The Weekly Sentinel: Cynthia Cobb, Executive Project Briefing: Rachel Buller

Review and update cycle: The Weekly Sentinel is produced once a week. It is drafted and reviewed on Friday by the IAM PM team for review during the Monday status meetings and the mid week IAM Project Leadership meeting. In addition, the most recent version of this document is used during other meetings such as the IAM Executive Sponsorship meeting.

The Executive Project Briefing is produced once a month posted on web site and sent to CCSP and Reach.

The Weekly Sentinel: The draft and latest version of The Weekly Sentinel is in a document library in the IAM SharePoint Workspace. The complete collection of Executive Project Briefing Sheets are posted on the IAM Web Site.

Calendar view of recurring activities