## Texas State University-San Marcos, Technology Resources’ Project Management Practices – Process Work Flow

<table>
<thead>
<tr>
<th>Phase 1 – Initiation</th>
<th>Phase 2 – Planning &amp; Design</th>
<th>Phase 3 – Execution &amp; Control</th>
<th>Phase 4 – Close-out</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Proposal Initiators</strong></td>
<td><strong>Planning &amp; Design</strong></td>
<td><strong>Execute/Prototype/Build/Monitor</strong></td>
<td><strong>Implementation Signoff</strong></td>
</tr>
<tr>
<td>- Initiation Proposal/Charter</td>
<td>- Planning &amp; Design - Build WorkPlan</td>
<td>- Implementation, Coordination &amp; Verification</td>
<td>- Implementation Approval</td>
</tr>
<tr>
<td><strong>IT Management Approvers (AVP)</strong></td>
<td><strong>Level 1</strong></td>
<td><strong>Level 2</strong></td>
<td><strong>Project Close-Out</strong></td>
</tr>
<tr>
<td>- Proposal Review/Approval</td>
<td>- Project Initiation/Approval</td>
<td>- Execution/Build Approval</td>
<td>-</td>
</tr>
<tr>
<td><strong>University Division Approvers (Priority Groups)</strong></td>
<td></td>
<td>- Implementation Approval</td>
<td></td>
</tr>
<tr>
<td>- Project Initiation/Approval</td>
<td></td>
<td>-</td>
<td></td>
</tr>
</tbody>
</table>

### Initiation: Required Documentation
- **All Projects**
  - Proposal/Charter/Stakeholders List
  - Business Requirements (Level 1)*
  - Security Requirements
  - Hi-Level Estimate (Level 1)
  - Communication Plan (Level 1)

### Planning: Required Documentation
- **Ultra-Lite**
  - Requirements (Level 2)**
  - Communications Plan (Level 2)
  - Work Plan / Schedule
- **Lite**
  - All documents above, plus
  - Activity Diagram
  - Work Breakdown Structure (WBS)
  - Testing Plan
  - Training Plan
  - Cost Estimates/Baseline, if applicable
- **Full**
  - All documents above, plus
  - RFI, RFO, RQF, if applicable
  - Vendor Statement of Work/Contract
  - Risk Assessment/Planning
  - Change Management Plan
  - DIR Framework, if applicable

### Execution & Control: Required Documentation
- **All Projects**
  - Update Tasks Daily
  - Approve Task Updates Daily
  - Work Plans Updated with task update/approvals through completion of all tasks

### Close-Out: Required Documentation
- **All Projects**
  - Close-out Report

### Project Classification Descriptions (also refer to Project Classification Criteria Checklist)

#### Ultra-Lite:
- Ultra-Lite Projects are defined as low risk projects, which meet the following considerations: simple in nature, minor in impact and complexity (both business and technical requirements), limited in cost and work effort, limited requirements for communications; and meet the Classification Criteria specified by TR for an Ultra-Lite Project.

#### Lite:
- Lite Projects are defined as medium risk projects, which meet the following considerations: intermediate in nature, moderate in impact and complexity (both business and technical requirements), limited in cost, moderate work effort, moderate requirements for training and communications; and meet the Classification Criteria specified by TR for a Lite Project.

#### Full:
- Full Projects are defined as high risk projects, which meet the following considerations: large in nature, significant in impact and complexity (both business and technical requirements), involves new systems or new products and may involve supplier or consultants with the need to monitor cost expenditures, significant work effort, moderate to significant training, communications, and change management requirements; and meet the Classification Criteria specified by TR for a Full Project. Projects costing over $1,000,000 and duration over 1 year must also follow the Texas Project Delivery Framework.

*Level 1 = High Level  ** Level 2 = Detailed Level*