**Overview / Purpose**

Lifecycle Gate Reviews ensure that all project stakeholders agree that the project is on-track and ready to move to the next activity or phase.

**This checklist serves as a guide for the Project Manager to ensure that the project has completed the necessary steps for the phase.**

Note: Depending on the size and nature of the project all or some of the gates and/or deliverables would apply. Bold font indicates activities that would be applicable for most projects

**Process Guideline**

* The Project Manager or Project Lead **(PM)** works with the PMO Portfolio Manager **(PoM)** to prepare for the Gate Review
* PM identifies appropriate Lifecycle Gate Review Board members which includes key stakeholders/decision makers on the project.
* PM updates this Gate Review checklist and PoM reviews and provides support to ensure accuracy
* PoM coordinates and facilitates the review process by conducting gate review meeting. (in cases where a meeting is not feasible/necessary, approvals may be obtained via email from Review Board members)
* The expected outcome of the review is to arrive at one of the following conclusions.
	+ Proceed to next phase
	+ Proceed to next phase with open items
	+ Not recommended to proceed

Note: The review notes should document the specific action items

* The **templates** linked below against the key activities serves as a guideline for the task. Additionally please refer to **‘**[**Project Management Methodology**](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/10/Project_Management_Methodology.docx)**’** and **‘**[**Effective Requirements overview**](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2018/01/OM-TRN-004_Requirements_Training_v3.0.pptx)**’** documents for guidance.

PS : PoMs for the different areas - EAS Student– Jonathan Candari; TSS – Sharif Akkara; EAS non-Student & ETS – Maurice Willoughby

**Initiation (Pre-Plan) Gate**

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| **Phase** | **Activity**  | **Typical deliverable(template)**  | **Y/N/NA** | **Provide the link and/or comments for the activity/deliverable** |
| Initiation | **Identify a Project Lead/Manager**  | [Project Discovery Initiation](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/Project-Discovery-Initiation-Document.doc)  |  |  |
| **Initiation** | **Identify a Sponsor** | [**Business Case**](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/PMO-Template_Business_Case-Charter_v1.0-2.docx) **/** [**Project Discovery Initiation**](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/Project-Discovery-Initiation-Document.doc) |  |  |
| **Initiation** | **Define the Business Need / Opportunity** | [**Business Case**](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/PMO-Template_Business_Case-Charter_v1.0-2.docx) **/** [**Project Discovery Initiation**](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/Project-Discovery-Initiation-Document.doc) |  |  |
| **Initiation** | **Identify Business Objective and Benefits** | [**Business Case**](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/PMO-Template_Business_Case-Charter_v1.0-2.docx) **/** [**Project Discovery Initiation**](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/Project-Discovery-Initiation-Document.doc) |  |  |
| **Initiation** | **Identify and Engage Key Stakeholders** | [**Business Case**](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/PMO-Template_Business_Case-Charter_v1.0-2.docx) |  |  |
| **Initiation** | **Identify Key Potential Risks** | [**Risk Log**](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/10/PMO-Risk-Mgt-Worksheet-1.xls) |  |  |
| **Initiation** | **Determine Cost/Benefit and Schedule Estimates** | [**Cost Estimating Sheet**](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/Combined-CAR-and-Proposal-Project-Tracking.xls) |  |  |
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**Plan (Pre-Execute) Gate**

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| **Phase** | **Activity**  | **Typical deliverable(template)** | **Y/N/NA** | **Provide the link and/or comments for the activity/deliverable** |
| Plan | **Assign Project Lead/Manager**  |  |  |  |
| Plan | **Define Project Scope** | [Project Charter](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/10/Project-Charter-Template.doc) |  |  |
| Plan | **Define Project Objectives** | [Project Charter](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/10/Project-Charter-Template.doc) |  |  |
| Plan | Identify Project Constraints and Assumptions | [Project Charter](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/10/Project-Charter-Template.doc) |  |  |
| Plan | Determine Procurement and Sourcing Strategy | [Project Management Plan](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/Project_Mgmt_Plan.docx) |  |  |
| Plan | **Define Project Schedule/Work Plan** | Project Plan |  |  |
| Plan | Define Project Organization and Governance | [Project Management Plan](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/Project_Mgmt_Plan.docx) |  |  |
| Plan | Identify Other Resource Requirements | [Project Charter](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/10/Project-Charter-Template.doc) |  |  |
| Plan | **Establish Project Life-Cycle Phase Checkpoints** | [Project Scorecards](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/Sample-Project-Scorecard_-10_5_08.doc) |  |  |
| Plan | Refine Project Cost Estimate and Budget | [Cost Estimating Sheet](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/Combined-CAR-and-Proposal-Project-Tracking.xls) |  |  |
| Plan | Refine and update Project Risks | [Risk Log](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/10/PMO-Risk-Mgt-Worksheet-1.xls) |  |  |
| Plan | Determine process for Issue Identification and Resolution | [Project Management Plan](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/Project_Mgmt_Plan.docx) |  |  |
| **Plan** | **Develop a Communication Plan** | [**Communication Plan**](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/08/COMMUNICATION-PLAN_120612_PM.doc) |  |  |
| Plan | **Perform Plan Phase Handshake with ServiceDesk/Support team** (identify the support group, estimated support needs and high level support parameters etc)  | Support Handover Document  |  |  |
| Plan | Conduct plan phase checkpoint with IT Network, Infrastructure and Security  |  |  |  |

**Design Gate (Specify and Design Phase)**

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| **Phase** | **Activity**  | **Typical deliverable(template)** | **Y/N/NA** | **Provide the link and/or comments for the activity/deliverable** |
| Specify | **Define detailed functional & non-functional Requirement** | [Requirement Document](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/PMO-Template_Business_Requirements_Document_v1.1.docx) |  |  |
| Specify | Define detailed Reporting Requirements  | [Requirement Document](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/PMO-Template_Business_Requirements_Document_v1.1.docx) |  |  |
| Specify | Establish Requirement Traceability Matrix  | [Requirement Traceability Matrix](https://montclair.instructure.com/files/514401/download?download_frd=1) |  |  |
| Specify | **Define Test Strategy / Plan**  | [Test Plan](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2018/02/MSU-IT-Test-Plan-Template-v1.1.docx) |  |  |
| Specify | Define Infrastructure/Server needs  | [Requirement Document](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/PMO-Template_Business_Requirements_Document_v1.1.docx) |  |  |
| Specify | Define Data Conversion/Migration | [Requirement Document](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/PMO-Template_Business_Requirements_Document_v1.1.docx) |  |  |
| Design | Define Business Process Workflows  | [Technical Design Document](https://montclair.instructure.com/files/466068/download?download_frd=1) |  |  |
| Design | Develop Data Flow Diagram (Level 0) | [Technical Design Document](https://montclair.instructure.com/files/466068/download?download_frd=1) |  |  |
| Design | Develop Technical Architecture, Design, Integration and Configuration Requirements | [Technical Design Document](https://montclair.instructure.com/files/466068/download?download_frd=1) |  |  |
| **Design** | **Design review conducted with the Architecture Review Board** | [**Architecture Checklist**](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/OneMontclair-Conceptual-Architecture-Review-Checklist.doc) |  |  |
| Design | **Perform Design Phase Handshake with ServiceDesk/Support team** (identify any changes required to MSU supported hardware or images etc) | Support Handover Document |  |  |
| Design | **Define Training Plan** | [Training Plan](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/12/SDLC7_TrainingPlan1.doc) |  |  |
| Design | Conduct design phase checkpoint with IT Network, Infrastructure and Security |  |  |  |

**Build (Configure) Gate**

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| **Phase** | **Activity**  | **Typical deliverable(template)** | **Y/N/NA** | **Provide the link and/or comments for the activity/deliverable** |
| Build | **Build Completed and Reviewed / Unit tested** | [Test Log](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2018/02/MSU-IT-Test-Case-and-Result-template-v1.0.xlsx) |  |  |
| **Build** | **Document Maintenance Instructions** | **Maintenance Manual** |  |  |
| **Build** | **Develop Test scenarios / cases**  | [Test scenarios / cases](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2018/02/MSU-IT-Test-Case-and-Result-template-v1.0.xlsx) |  |  |
| Build | Establish Requirement Traceability to testcases | [Requirement Traceability Matrix](https://montclair.instructure.com/files/514401/download?download_frd=1) |  |  |
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**Test Gate**

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| **Phase** | **Activity**  | **Typical deliverable(template)** | **Y/N/NA** | **Provide the link and/or comments for the activity/deliverable** |
| Test | **Complete System Testing**  | [Test Log](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2018/02/MSU-IT-Test-Case-and-Result-template-v1.0.xlsx) |  |  |
| Test | **Complete User Acceptance Testing**  | [Test Log](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2018/02/MSU-IT-Test-Case-and-Result-template-v1.0.xlsx) |  |  |
| Test  | Complete Non-functional Testing | [Test Log](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2018/02/MSU-IT-Test-Case-and-Result-template-v1.0.xlsx) |  |  |
| Test | **Bring all Open Issues/Defects to closure** | [Defect Log](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2018/01/MSU-IT-Defect-tracker-template-v1.0.xlsx) |  |  |
| Test | **Develop User/Training Manual**  | Training Manual |  |  |
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**Pre-Release / Cutover**

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| **Phase** | **Activity**  | **Typical deliverable(template)** | **Y/N/NA** | **Provide the link and/or comments for the activity/deliverable** |
| Pre-Release | Conduct Pre-release checkpoint with IT Network, Infrastructure and Security |  |  |  |
| **Pre-Release** | **Prepare Go-Live communication / Release Description** | **Release Notes / Release Communication** |  |  |
| Pre-Release | **Perform Release Phase Handshake / Final Handover with ServiceDesk/Support team** (necessary ServiceNow updates done to reflect new assignment groups, users, approvers and any generic email for incident routing etc) | Support Handover Document |  |  |
| Pre-Release | **Prepare Deployment / Back-out Plan** |  |  |  |
| Pre-Release | Complete updates to the MSU website  |  |  |  |
| Pre-Release | **Confirm all Systems Acceptance Criteria is met** | [Operational Handover](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/08/OM-CKL-002_Operational_Handover_v1.0.docx) |  |  |
| Pre-Release | **Identify ongoing support needs and responsibilities**  | [Operational Handover](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/08/OM-CKL-002_Operational_Handover_v1.0.docx) |  |  |
| Pre-Release | **Identify ongoing training needs and responsibilities**  | [Operational Handover](https://www.montclair.edu/program-management-office/wp-content/uploads/sites/42/2017/08/OM-CKL-002_Operational_Handover_v1.0.docx) |  |  |
|  |  |  |  |  |

**Post Go-Live / Closure Gate**

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| **Phase** | **Activity**  | **Typical deliverable(template)** | **Y/N/NA** | **Provide the link and/or comments for the activity/deliverable** |
| **Closure** | **Close and store vendor agreements, contracts and records**  |  |  |  |
| Closure | Complete retirement plans (for systems being replaced)  |  |  |  |
| Closure | Conduct Lessons Learned meeting / Post Mortem | Lessons Learned  |  |  |