**STATUS REPORT TEMPLATE**

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| **Project Name:** | **Project Number:** | **Prepared by: (Project Manager)** | **Date:** |
|  |  |  |  |
| **Sponsor:** | **Business Unit:** | **Project Type:** | |
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| **Project Scope Statement Document Description** | The Project Scope Statement is the document of record for the project scope. It expands on the earlier work done in the Project Charter and stablishes a common understanding of the project scope among project stakeholders. Most important, it establishes not only what is in scope but also what is out of scope for the project. As the project progresses, the scope statement may be appended to reflect scope  Changes submitted through the Project Change Request process. | |
| The selection | | |
| **Project Objective** | *Information regarding the business need your project addresses.* | |
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| **Detailed Project Scope** | | *Describe in detail the project deliverables that are included and excluded.* |
| **In Scope** | | |
| 1. Role-based workflow configuration (i.e. APO, Faculty, Deans) 2. Comprehensive workflow configuration with approval-based controls including conditional, triggers, alerts, etc. 3. Generation of documents 4. Notifications and communications 5. Workflow templates - ability to develop and maintain 6. Solicit for letters of recommendations and capture replies in system (Internal and External recommenders) 7. Document attachments, searching, retrieval, archival 8. Ability to redact specific data from specific documents 9. Secure access based on role 10. Tracking comments and inputs 11. Reporting 12. Voting Capability 13. Document Transfer capability from one role (eg: Dean) to the other (eg: faculty) 14. Ability to interface with other systems like Banner and Digital Measures? 15. Automating faculty advancement process 16. Case Review workflow | | |
| **Out of Scope** | | |
| 1. Building a separate or customized module or workflow for faculty advancement or case review process | | |
| **Project Acceptance Criteria** | | *Acceptance criteria are the metrics that must be met before the project services*  *and proposed deliverables will be accepted.* |
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| **Project Constraints** | | |
| **A) Cost** | | *Describe any cost project limitations that may affect the performance of the project. Example: funding was not planned for in this fiscal year and may delay project start date.* |
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| **B) Resource** | | *Describe any resource project limitations that may affect the performance of the project. Example: Resources require additional training for project implementation.* |
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| **C) Schedule** | | | | *Describe any schedule project limitations that may affect the performance of the project. Example: Required to Go Live by 6/30 due to UCOP mandate/compliance.* | | | | |
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| **D) Security** | | | | *Describe any security limitations that may affect the performance of the project. Example: Vendor system or service uses unsupported browser.* | | | | |
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| **E) Technical** | | | | *Describe any technical project limitations that may affect the performance of a project. Example: Vendor platform can only support 500 concurrent users.* | | | | |
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| **High Level Agreement(s)** | | | | | | | | |
| **Resource** | | | | *List the verified resources for this project.* | | | | |
|  | **Resource Name** | **Department** | **Supervisor** | | **Role** | **Total Hours** | **Allocation % (per week)** |  |
|  | Greg Camfield | APO, APPO |  | | Sponsor, Final Approver |  |  |  |
|  | Dana Kuebler | IT PMO |  | | Project Manager |  |  |  |
|  | Becky Gubser | APO |  | | Subject Matter Expert (Admins and analyst) |  |  |  |
|  | TBD | SSHA |  | | Subject Matter Expert (Dean) |  |  |  |
|  | Mark Matsumoto | SOE |  | | Subject Matter Expert (Dean) |  |  |  |
|  | Juan Meza | SNS |  | | Subject Matter Expert (Dean) |  |  |  |
|  | Jill Robbins | SSHA |  | | Subject Matter Expert (Dean) |  |  |  |
|  |  | MWP |  | | Subject Matter Expert (Dean) |  |  |  |
|  | Elizabeth Whitt | Undergraduate |  | | Subject Matter Expert (Dean) |  |  |  |
|  | Paul Maglio | SOE |  | | Subject Matter Expert AP Charis |  |  |  |
|  | Anne Kelly | SNS |  | | Subject Matter Expert AP Charis |  |  |  |
|  |  |  |  | | Subject Matter Expert AP Charis |  |  |  |
|  |  |  |  | | Subject Matter Expert AP Charis |  |  |  |
|  |  |  |  | | Subject Matter Expert AP Charis |  |  |  |
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|  | Mubeena Salaam | | APO | |  | | | Business Analyst | |  | |  | |  |
|  | Pam Moody | | APO | |  | | | Core Team | |  | |  | |  |
|  | Sherry Coane | | APO | |  | | | Core Team | |  | |  | |  |
|  | Liz Soria | | APO | |  | | | Core Team | |  | |  | |  |
|  | Stephani Harris | | APO | |  | | | Core Team | |  | |  | |  |
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|  |  | |  | |  | | | Core Team, UAT | |  | |  | |  |
|  |  | |  | |  | | | Developer | |  | |  | |  |
|  |  | |  | |  | | | Architect | |  | |  | |  |
|  |  | |  | |  | | | Security | |  | |  | |  |
|  |  | |  | |  | | | Tester Script Developer | |  | |  | |  |
|  |  | |  | |  | | | IT Tester | |  | |  | |  |
|  |  | |  | |  | | | DBA | |  | |  | |  |
|  |  | |  | |  | | | Networking | |  | |  | |  |
|  |  | |  | |  | | | Systems Administrators | |  | |  | |  |
|  |  | |  | |  | | | Trainer | |  | |  | |  |
|  |  | |  | |  | | | ITSM | |  | |  | |  |
|  |  | |  | |  | | | Documentation Champion | |  | |  | |  |
|  |  | |  | |  | | | Procurement | |  | |  | |  |
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| **Budget** | | | | | | *Enter total budget for this project.* | | | | | | | | |
|  | **Activity Description** | **FAU#** | | **One Time Cost** | | | **Recurring Costs** | **Year 1** | **Year 2** | | **Year 3** | | **Line Item Total** |  |
|  | Internal staff labor |  | |  | | |  |  |  | |  | |  |  |
|  | External staffing costs |  | |  | | |  |  |  | |  | |  |  |
|  | Software license & support |  | |  | | |  |  |  | |  | |  |  |
|  | Hardware (e.g. VMs) |  | |  | | |  |  |  | |  | |  |  |
|  | Travel & |  | |  | | |  |  |  | |  | |  |  |

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|  | Expense |  | |  | |  | |  |  | |  |  |  |
|  | Training |  | |  | |  | |  |  | |  |  |  |
|  | Contingency (e.g. risks) |  | |  | |  | |  |  | |  |  |  |
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|  |  | **Total**: | |  | |  | |  |  | |  |  |  |
| **Schedule** | | | | | *Enter Go Live date or schedule for this project.* | | | | | | | | |
|  | **Phase Sub-phase Expected Output Target Date** | | | | | | | | | | | |  |
|  | Initiation | | Initiation | | | | Charter & Kick-Off Meeting | | |  | | |  |
|  | Planning | | Tech Requirements | | | | Architecture & Security  Review | | |  | | |  |
|  | Planning | | Project Artifacts | | | | RAID, Scope, Budget &  Schedule | | |  | | |  |
|  | Execution | | Build | | | | Development | | |  | | |  |
|  | Execution | | Testing | | | | Test plan, scripts & test  results | | |  | | |  |
|  | Execution | | Final UAT | | | | Tester training, test results & sign-off | | |  | | |  |
|  | Execution | | Service Transition | | | | Service Level Agreement (SLA), Service Now on- boarding, documentation (e.g. policies, guides, procedures), Operation Level  Agreement (OLA) | | |  | | |  |
|  | Execution | | Implementation | | | | Change order, CAB,  deployment schedule, deploy | | |  | | |  |
|  | Execution | | Post Go live | | | | Final service transition & end user acceptance | | |  | | |  |
|  | Close | | Close | | | | Project close, lessons learned, project feedback,  budget/resources released | | |  | | |  |
| **Project Assumptions** | | | | | *List and describe any perceived or stated project assumptions and the potential impacts of those assumptions on the project if they prove to be false.* | | | | | | | | |
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By approving the Scope Statement, you are in agreement with the project scope as described herein.

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| **Stakeholder(s)** | **Name** | **Signature** | **Date** |
| Executive Sponsor |  |  |  |
| Project Sponsor |  |  |  |
| Project Manager |  |  |  |