

Plan of Record (POR) Document Template

Introduction:

This is a suggested template for a Plan of Record (POR) document to be developed jointly by the Customer and Supplier. The purpose of this document is to record the planned content and milestone dates associated with the testing, acceptance and deployment of a software project to be measured. These plans may be compared against actual deliveries throughout the project to measure the Supplier's performance.

A new POR document should be created for each major Software Project to be measured. It is recommended the Customer own and store the document. Any changes should be approved by both the Supplier and Customer representatives.

Text in italics is instructions for using the template and may be deleted from an actual POR document. Text in blue font is key input data for the standard software scorecard measure.

Document Revision History

Version	Date	Author	Description

Section I – Software Release Overview

1. Supplier, Product Name, Software Release Name

Document the name of the Supplier, Product(s) and Software release(s) covered by the Plan of Record document.

2. Applicable Technical Standards

List any of the Technical Standards that apply to this Software Project.

3. Release (Project) Description and Scope

Provide a description of what additions and changes are included in this software project. Give an overview of the scope of the project for implementation of the software.

A detailed document may be attached.

4. Applicable Hardware and Prerequisites

Provide an overview of the hardware required for this software project. Include any hardware changes required to support the new software release.

5. Production and Acceptance Test Considerations

Document requirements or recommendations for testing this software in the customer environment. This might include other software applications, test equipment, diagnostic capability, or skilled personnel.

6. Plan of Record Milestone Dates

a. Initial Software Delivery Date

Record the planned date for initial delivery of the software release(s) to the customer. If the software is made available for downloading by the customers, the date it is available may be used.

POR Software Delivery Date: **MM/DD/YYYY**

b. Deployment Ready Date

Record the POR Deployment Ready (PORDR) date. This is the date when Customer Lab and/or Field Testing have been completed and software is deemed accepted by the Customer to begin installation in the remaining target equipment. This is the date that will be used to determine the Deployment Ready Variance (DRV) metric, after the actual Deployment Ready Milestone is completed.

POR Deployment Ready (PORDR) Date: **MM/DD/YYYY**

c. Other Planned Dates (e.g. Document delivery, Testing dates)

Record any other important planned dates that your organization would like included in the POR. Examples include, Start of Customer Lab Testing, End of Customer Lab testing, Start of Production Testing, End of Production testing, Start of Deployment, End of Deployment, etc.

7. Features and Functionality

a. List of Plan of Record Features and descriptions

Feature ID	Feature Name	Short Description

A document may be attached.

b. Number of Planned Features in POR

The total number of features in the above list. This will be used as the Number of Planned Features (NPF) in the Software Features Accepted (SFA) metric.

Number of Planned Features (NPF): **###**

c. Other Features

In this section you may list other features included in the release which would not be included in the measurements. This might include optional features or features not fully developed in this release.

d. Capacity / Performance Considerations

Document any non-functional requirements, constraints, or commitments.

e. Software Upgrade Path / Requirements

Document any software requirements for this software release. Including upgrade path (required prior release), Operating System requirements, and other software interworking.

f. Configuration Requirements

Document any hardware or software configuration requirements for this software release.

Section II – Contact Information / Agreement

1. Customer Contacts

Role	Name	Title	Dept	Phone	Email

2. Supplier Contacts

Role	Name	Title	Dept	Phone	Email

3. Signoff / Agreement on the POR

Customer Responsible Party:

Name:

Title:

Date of Agreement:

Supplier Responsible Party:

Name:

Title:

Date of Agreement:

Attach email or other certifying documentation as needed.

Section III – Final Measurements to be Completed after Deployment Ready Milestone

1. Actual Deployment Ready (ADR) date

This is the date that will be used for the Deployment Ready Variance (DRV) metric.

Actual Deployment Ready (ADR) Date: **MM/DD/YYYY**

2. List and Number of Accepted Features at Deployment Ready

Feature ID	Feature Name	Feature Accepted (YES / NO)

Record below the Number for Accepted Features (NAF) to be used for the Software Features Accepted (SFA) metric.

Number of Accepted Features (NAF): **###**