# Project Initiation Best Practices Checklist

These project initiation best practices allow teams to identify risk areas early in the project lifecycle.

Make sure you have the latest version of this document by visiting the [Project Initiation Best Practices Checklist](https://forum.appian.com/suite/help/7.11/Project_Initiation_Best_Practices_Checklist.html) page on Forum.

## Project Information

|  |  |  |
| --- | --- | --- |
| **Item** | **Importance** | **Status** |
| Project lead has been identified | High |  |
| Technical lead has been identified | High |  |
| [Product Owner](http://www.scaledagileframework.com/product-owner) has been identified | High |  |
| Schedule has been defined | Medium |  |

## Sizing/Load

|  |  |  |
| --- | --- | --- |
| **Item** | **Importance** | **Status** |
| Peak concurrent user load has been estimated | High |  |
| Peak process initiation rate has been estimated | High |  |
| Average process size, duration and retention in memory has been estimated | High |  |
| Expected process memory use has been estimated | High |  |
| Document storage has been estimated | Low |  |
| Database storage has been estimated | Low |  |

## Environments/Infrastructure

|  |  |  |
| --- | --- | --- |
| **Item** | **Importance** | **Status** |
| Environments have been defined and will be available when needed | High |  |
| Production-use software has been procured | High |  |
| Production clone environments have been defined | Medium |  |
| Production physical architecture has been defined | High |  |
| Production network architecture has been defined | Medium |  |
| Mobile access from internal and/or public networks has been defined | High |  |

## Application Architecture

### General

|  |  |  |
| --- | --- | --- |
| **Item** | **Importance** | **Status** |
| High level design has been documented | High |  |
| Uses Tempo instead of the legacy Apps portal | High |  |
| Encourages user collaboration | Medium |  |
| Supports mobile use | Medium |  |
| Application/global naming prefix(s) have been defined | Medium |  |

### Records

|  |  |  |
| --- | --- | --- |
| **Item** | **Importance** | **Status** |
| Key business record types have been identified | High |  |
| Source of data for key business record types have been identified | Medium |  |
| Expected number of records per record types have been defined | Medium |  |
| Security models for key record types have been defined | Medium |  |
| [Appian Health Check](https://forum.appian.com/suite/help/7.11/playbook/Using_the_Appian_Health_Check.html) schedule has been defined for each environment | High |  |

### Reports

|  |  |  |
| --- | --- | --- |
| **Item** | **Importance** | **Status** |
| Key business reports have been identified | High |  |
| Source of data for key business reports have been identified | Medium |  |
| Security models for key record types have been defined | Medium |  |
| Avoids using process analytics reports in favor of database entity-backed reporting | Medium |  |

### Data

|  |  |  |
| --- | --- | --- |
| **Item** | **Importance** | **Status** |
| Datasources have been identified | Medium |  |
| Datasources are for exclusive Appian use | Medium |  |
| Datasource schema will be defined by development team | Low |  |
| Number of CDTs has been estimated | Medium |  |
| Total number of data elements has been estimated | Medium |  |
| Uses appropriate data model relationships for expected use cases | High |  |

### Process

|  |  |  |
| --- | --- | --- |
| **Item** | **Importance** | **Status** |
| High level process models have been identified | High |  |
| Design calls for decomposition of process models into sub-processes | High |  |

## External Integration

|  |  |  |
| --- | --- | --- |
| **Item** | **Importance** | **Status** |
| Base product integrations have been defined | High |  |
| Custom integrations have been defined | High |  |
| Points of contact are defined for all external systems | Medium |  |

## Identity Management and Authentication

|  |  |  |
| --- | --- | --- |
| **Item** | **Importance** | **Status** |
| Account creation, update, and deactivation has been defined | Medium |  |
| Group management has been defined | Medium |  |
| Authentication method has been defined | High |  |
| Allows mobile access | Medium |  |
| Allows Administrator/sysadmin access | Medium |  |

## Change Control

|  |  |  |
| --- | --- | --- |
| **Item** | **Importance** | **Status** |
| Version control is defined | Low |  |
| Uses Configure Script | Medium |  |
| Appian deployment procedures have been defined | Medium |  |

## Cloud

|  |  |  |
| --- | --- | --- |
| **Item** | **Importance** | **Status** |
| All plugins are approved for Cloud deployment | Medium |  |
| Requires access to on-premise resources via VPN | Medium |  |
| Requires data migration between environments | Medium |  |

## Other

|  |  |  |
| --- | --- | --- |
| **Item** | **Importance** | **Status** |
| Requires new custom plugins | Medium |  |
| Requires data migration | Medium |  |
| Requires critical security requirements | Medium |  |
| Must support users who speak different languages | Medium |  |
| Requires strict 508 compliance | Medium |  |

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