

Repository Document Types

Collaborative Change Management Document Types

The following lists the primary types of documents created and used in the Change Management repository. Not every site will make use of all of these tools.

Administration Form (Field Map Document)

Each Repository has one of these special documents that provides controlling values for a wide range of functions. This is an administrative document that should not be modified by anyone other than the repository manager or system administrator. Many of the default settings used when new profiles are created are stored in this document. It can be located using the "All documents in Database" view.

Asset Documents

Assets are used to hold reference materials such as files, drawings, photographs, technical papers and links to external sites. Assets are generally associated with a specific project, program, organization or participant or user.

Dependency Link

A document that is created to logically link an issue, risk, or scope change to more than one project. Multiply connected documents are shown in reports for all of the associated projects, but are counted in statistics only for the owning project.

Discussion Document

A document used to support group communication about subjects that do not require the formal follow up actions associated with issues, risks or scope changes or the approvals required for project documents. They can be project or non-project specific.

Document Type Definition

This document defines a class of project documents. The availability of documents of such classes may be used as conditions within project processes. They may also become requirements for project tasks and trigger a variety of notifications. The definition itself provides "help" information for the creators of documents of that class.

Historical Review Comments

This is a Review Comments page that has been superseded by a later review. These pages allow prior review comments to be retained for the life of the project.

Issue

An Issue document is used to identify a problem in a project that needs attention and assigns someone to look into it. Issues are tracked at the project dashboard level.

Journal

A document that exists for each user that records notes and links to other repository documents.

News

A news document is a public announcement to the members of the repository community. News can be created manually or automatically as a result of review initiation or project publication.

Online Guide Document

This is collection of customer created "Help" document to provide advice to users.

Organization Profiles

One profile is created for each department. Participants are associated with organizations for reporting.

Participant Profiles

One for each person involved in any project. It provides settings for each person to enable use of Timesheets and automatic notification.

Participant Status Report

A document that records the recent accomplishments for an individual. A Participant Status report may be specific to a project, or apply to all work of that person.

Program Profile

These provide a way of grouping projects for reporting. The hierarchy of programs is used to structure the project dashboard.

Project Documents

This is general class of documents that are products of the work being done such as specifications, reports or drawings. There are several formats provided for project documents and your site can add additional formats easily. Prior versions of project documents are maintained.

The Document Tracking features of Project Gateway allow the production schedule of project documents to be integrated into the process schedule.

Project Profiles

A project profile is created for each project. It summarizes project goals, ownership, and progress and contains setting to control how the system supports the project implementation process.

Response - Issue, Risk, Scope Change, Discussion, Asset

Documents of these types are created to form threads of conversations around issues, risks, scope changes, and discussion topics. They are created using the "Respond" action buttons on the primary forms.

Review Comments

A form that accumulates comments posted by reviewers about a particular document. This acts as a notepad so that the primary document can remain unchanged.

Risk

A document used to identify future problems that might occur during a project and define strategies for avoiding and resolving them. Risks can be converted into Issues and vice versa.

Scope Change

A scope change document is used to define, evaluate and approve changes to the content and goals of a project. Scope change control is very important to achieving project success.

Scope changes have a formal approval process, with provision for automatic escalation based upon the magnitude of the requested change.

Signoff Definition

This document defines a step of a process. For the step a list of required approvers and as set of preconditions is defined.

When these steps are included in a process, the adopting project will be forced to obtain approvals a specific points in its lifetime.

Signoff Process Definition

This document defines a management approval process, which a set of approvals that a project must obtain as it is executed in order to comply with the management requirements of the corporation or agency.

The process definition can include both required and situation dependent steps. It also provides proforma schedule assumptions.

Once created, processes are adopted for specific projects to assist the manager in achieving compliance with corporate requirements.

Status Report

A document that can be created by a project leader to record a project's situation, recent accomplishments, and short term objectives as of a particular date.

Team Profile

A team profile defines a list of repository users. These team lists are used to limit access to project information to members of the designated teams. Teams can also be used to define participants in group reviews.

XML Custom Field Definition

This is a document used to tell the repository to transmit additional project information to the attached Project Observatory system.

Additional Types used in a Full Project Gateway System

Assignment

An assignment document is created for each task that a person is supposed to do. Each project may have a only a few or thousands of assignments. These are the most common type of document found in the repository. Assignments are organized into views showing to do lists by person and project.

Some assignments are identified as "Key Events" for reporting purposes. These correspond to milestones in planning systems.

Assignments come in four flavors.

Task assignments that report work effort via timesheets.

Task assignments that do not require time reporting. These are referred to as Non-time reporting or "light" assignments.

Summary assignments that report all work effort of an entire project, rather than a single task, on timesheets.

Buffer assignments that act as shock absorbers and measurement tools for project schedules. Buffer assignments are used to incorporate contingency time into schedules.

Calendar Dependency

A document that specifies how project key events should be scheduled with respect to meeting events placed upon a specially designated Notes calendar. When the expected relationship changes, a manager is notified.

Charge Slip

This is a document used to post a specific charge against a project such as a travel cost. Can also be used to record billable hours for consultants and others who do not use timesheets.

Checklist

A standard checklist document is a template used to provide detailed steps for an assignment, project or deliverable.

This word is also used to refer to the specific checklist contained within a particular assignment, project or deliverable that may be derived from a template or may be created specifically for that work item.

The individual elements of a checklist are called "checklist items."

Checklist Verification Request

This is a form used to ask a third party to affirm that the closure of a checklist item is satisfactory.

Checksheet

A checksheet is not actually a stored document. Rather it is a web form or set of Notes dialogs used as a transaction to update the checklists of all your assignments and the start and finish dates of non-time reporting assignments.

Date Dependency

A document that specifies how project key events should be scheduled with respect to a specific date. When the expected relationship changes, a manager is notified.

Deliverable

A document that defines a management goal. Deliverables may be linked to ongoing projects and to each other for reporting. Deliverables can be organized in a hierarchical tree format and appear on their own dashboard.

InterProject Dependency

A document that specifies how key events (milestones) in two projects should be scheduled with respect to one another. When the expected relationship changes, a manager is notified. This is a tool for program management. IPD's are displayed graphically in on program level Milestone Gantt charts

Key Events Selector

A document used in conjunction with the Selected Milestones action to define a named subset of key events for a project that will later be used for reporting.

Methodology Topic

Documents of this type are used to provide detailed help to participants as they do assigned tasks. They are directly linked to the project assignments. Method references can be incorporated into Schedule Templates and can be created when importing Microsoft Project plans.

Schedule Template

This is a document which contains a project schedule in prototype form. The template can then be used to generate a schedule for a specific project or project phase.

Templates are highly scaleable so that they can construct workplans in to preset dates, phases, and effort budgets.

The Schedule Template contains an integrated web based planning and presentation subsystem for the definition of the tasks, resources, documents and groups used therein.

Timesheet

Timesheets make it easy to record time spent on various assignments, projects, and overhead categories for a week. They provide a single point of entry for both accounting and project status information. Timesheets update assignments when posted and are the primary source of information to the costing system.

The timesheet incorporates both time accounting and checklist updating in to a single process.

What If Proposal

This is a document created by the Project Reschedule action which stores a revised project schedule for review and possible implementation.