

Using Project Documents

Overview

Project Documents provide a place to put work products such as charters, functional specifications, engineering drawings, sample templates, etc., that are created as part of a project.

Project Documents can be "versioned" so that prior editions of the document can be maintained allow with the most recent version.

Project documents provide a place to put information that needs to be available to the project team. They can also be linked into the task assignments of a project plan to form a complete methodology based workflow. We call this integrated task and document process "document tracking."

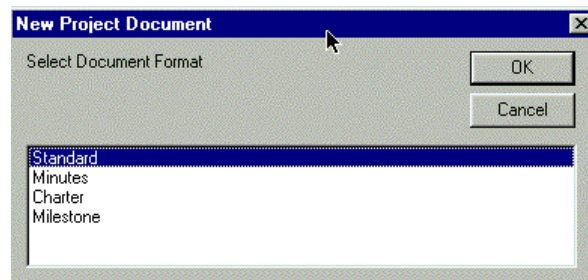
There are four project document formats provided with the Project Gateway system: Standard, Meeting Minutes, Project Charter, and Milestone Definition. New formats can be also be easily created for your site

All project documents formats share a common set of heading fields and actions that are explained below. The specific fields of the individual document formats are defined later in this chapter.

Creating a Project Document

Creating Project Documents (Notes)

To create a new project document, select "create a new project document" from the Project Documents Navigator, or the "Document" action on Project Profile or Assignment documents. This will display a dialog box listing available formats.



Select a format from the list to open a new Project Document Form of the selected type.

The screenshot shows a web form titled "Project Document" with a "Close" button in the top right corner. The form contains the following fields:

- Title:** A text input field.
- Project:** A dropdown menu with "A Deployment Plan" selected.
- Tracking Type:** A dropdown menu with "[None]" selected.
- Author:** A text input field containing "Gay M. Cole/MarinResearch".
- Status:** A dropdown menu with "Draft" selected.
- Classification:** A dropdown menu with "Not Approved" selected.
- Contents:** A large text area.
- Document Access and Edit Log:** A section below the contents field.

Creating Project Documents (Web)

To create a new project document, select "create a new project document" from the Project Documents Navigator, or the "Document" action on Project Profile or Assignment documents. A simple transaction page will appear to select both the project and document format. Press submit to create the document.

The screenshot shows a form titled "Create a New Project Document" with the instruction "Select the Project and document format, then press Submit". The form includes:

- Project:** A dropdown menu with "A Deployment Plan" selected.
- Document Format:** A dropdown menu with "Standard" selected. A list of options is visible: Standard, Minutes, Charter, and Milestone.
- Submit:** A button to the right of the Document Format dropdown.

The screenshot shows a web form titled "Project Document" with a navigation bar containing "Home Documents" and "by Project" and "by Author". The form contains the following fields:

- Title:** A text input field with "New Document for A Deployment Plan" entered.
- Project:** A dropdown menu with "A Deployment Plan" selected.
- Tracking Type:** A dropdown menu with "[None]" selected. A note says "If [Other], then enter name:".
- Author:** A text input field with "Anonymous" entered.
- Status:** A dropdown menu with "Draft" selected.
- Classification:** A dropdown menu with "Not Approved" selected.
- Contents:** A large text area.
- File Attachment:** Two "Browse..." buttons.
- Document Access and Edit Log:** A section below the file attachment fields.
- Who can read this document:** A dropdown menu with "Default" selected. A note says "(select everyone, author, or the name of a team)".
- Who can change this document:** A dropdown menu with "Author & Project & System Mgrs" selected. A note says "(select author, or the name of a team)".
- Submit:** A button at the bottom.

Title

The title field is a text entry that allows you to give any title you want to this document. This title will be shown in all views of project

documents. While in many cases it will be convenient to include the document type or format within the title, it is not necessary. Project Gateway creates a default title that you should modify before saving the new document.

[Version Dated]

This message will appear when this document has been saved as a prior version. It will show the date of the versioning.

Project

This field selects the project with which this document will be associated. This is a popup keyword list preloaded with the names of every project in the database. You should select the project before moving on to other fields.

You can change the project ownership using the Associate function at a later time.

Note: The default selection is "[All]." This is a special category for documents that are not associated with a particular project but which may be of interest to many repository users. Documents concerning policy, good practices, quality standards, etc., would be candidates for this classification. On the other hand, if your intent is to provide instructions to repository users, the Online Guide might be a better alternative.

Tracking Type

If you are using the document tracking feature, you should indicate which of the required work products you are creating by selecting the tracking type from the list provided. This displays a list box that will show the types of document that are used in the document tracking sections of the assignments of the selected project. This list is project dependent. The list may be empty. A document type will appear only if it is specified in one or more of the assignments in the selected project.

You can create a new tracking type of document by filling in the field at the bottom of the dialog. This new keyword will be stored only in this document; it will not become a permanent type for the database.

If you are not using document tracking, you can ignore this field.

Classification

This allows you to choose one of the predefined classification codes provided for your site. The default system provides Specification, Implementation, Quality Assurance, and Policy categories.

Status

The status of a new project document is always *Draft*. When you have completed work, set the status to "*Final*." The status of the document, whether draft or final is shown in the various document views as icons. The document tracking agent uses the existence of the completed status as an indicator as to whether the project requirements have been met.

When the document has been marked as final, it can be approved by the project manager.

Actions Available on Project Documents

Approve

This action appears when the status of the project document is final and the document is displayed by the project manager. Its function is to mark the document as approved. A notation of this approval and the date will appear next to the status field on approved documents.

Associate

The associate action allows you to change the project that this document is directly associated.

When an issue is re-associated, the issues count for the original and new projects will change.

Note

The Note action allows anyone to send a quick note to the author or project manager of an issue. See the chapter entitled "Using Note and Journal"

Save as New Version (Notes Only)

After you have made significant changes to your document, you may use this function to both save your work, and preserve the original. The prior versions will appear in the project document views as response documents.

Edit as New Version (Web Only)

When you are intending to make as significant change to your document from the web, you can use this function rather than the Edit action. This will make a copy of the existing document marked as a prior version, and then open the document for editing. When saved, both the new and older versions will be retained.

Promote

This will appear only on an "old version" of a project document. When used, it will convert the version into a new "first level" project document.

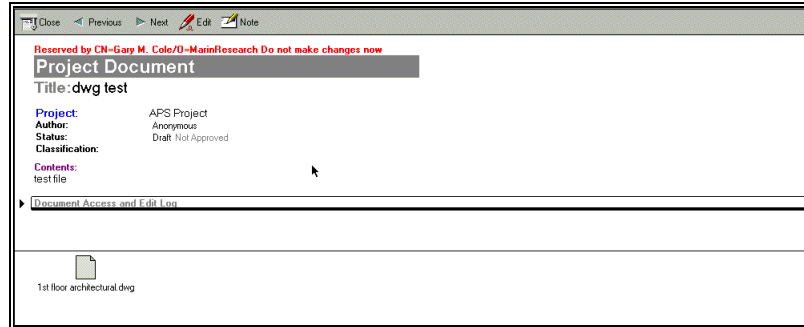
Add to Locator (Web Only)

This will display a transaction form to add this project document to your personal favorites list on the repository locator page.

Reserve (Web Only)

When a Project Document is displayed by a web browser, a "Reserve" button will appear. This creates a transactional form that allows you to take control of the document by limiting access of it to you.

There are two levels of reservation. If you take the default operation, the edit access of the document will be changed so that you are the only person allowed to change it. When anyone looks at the document, they see a notice at the top of the form saying that the document is reserved for you.



If you use the second kind of reservation, called "Checking Out", then both the read and edit access will be modified so that no one except you will be able to access the document at all. It will disappear from everyone else's views. In its place a "reservation slip" document will appear. When someone clicks on this reservation slip item in a view, they will see a form telling them that you have checked the document out.



To release the reservation, edit the document. An option will appear at the bottom to continue your reservation or to release it. Submit the document to change the status.

Project Document Views

These views are provided on the Project Documents Navigator.

by Author

This view tabulates documents categorize by Author first, Project Second, and then listed by Title. You would use this view to find documents written by a particular person. Notice that each document shows all previous versions.

by Project

This view tabulates documents by Project first, then by title. All previous revisions of the documents are listed below the current version.

by Classification

This view tabulates documents by Project and then by Classification and then by document.

by Program

This view tabulates documents by Program and Project and then by document title.

Tracking

This special view shows both project documents and project assignments. It gives you a single place from which you can instantly determine what documents are associated with each project, who is supposed to create each document, who needs each document, and the current availability of each document.

The first level categorization is by Program and Project. The next level is by tracking type in alphabetical order. All document types that are used in project assignments or in existing project documents will appear.

The tracking type is further subcategorized into "available", "creates", and "requires" depending upon where it is used.

available

The available category lists the title of the project document(s). The icon shows whether it is a work in progress (pencil icon) or a completed document. There can be several documents of the same type for one project.

creates

The creates category lists all the assignments in the project that have that document type in their "documents created" field.

requires

The requires category lists all the assignments in the project that have that document type in the "documents required" field.

Note: The planned start date is shown for the assignments and they are sorted by date. This means the earliest required date will be that shown by the first entry in the required section for each document type.

Document Reports

There are specific web based reports provided for listing the project documents for a project or program and for document tracking. See the chapter on web based reporting.

Project Document Formats

Standard

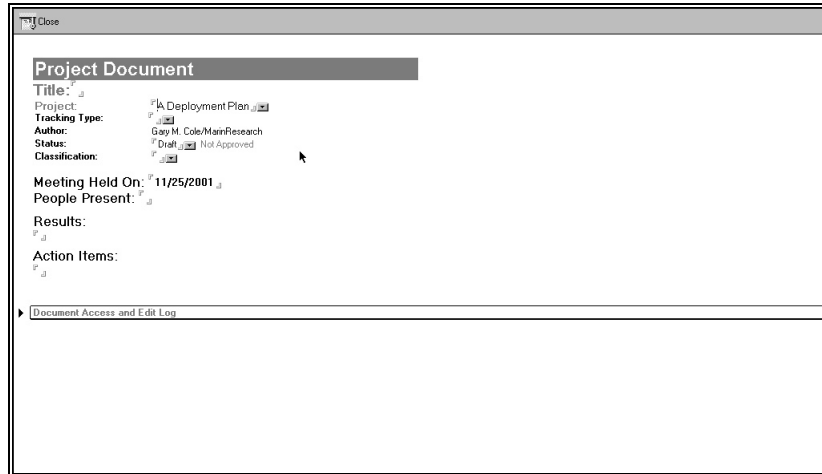
The screenshot shows a web interface titled "Project Document" with a "Close" button in the top left. The main content area is divided into two sections. The top section contains the following fields: "Title:" with a small icon; "Project:" with a dropdown menu showing "A Deployment Plan"; "Tracking Type:" with a dropdown menu showing "None"; "Author:" with a text input field containing "Gay M. Cole/MatirResearch"; "Status:" with a dropdown menu showing "Draft"; and "Classification:" with a dropdown menu showing "Not Approved". Below these fields is a "Contents:" section with a small icon. The bottom section is titled "Document Access and Edit Log" and is currently empty.

The standard format provides a single field labeled "Content" This can be used for any material. Web users will also see "Browse" buttons allowing them to attach files to the project document.

The screenshot shows a more detailed web interface titled "Project Document" with navigation links "Home Documents" and "by Project" and "by Author". The "Title:" field contains "New Document for A Deployment Plan". The "Project:" field has a dropdown menu with "A Deployment Plan" selected. The "Tracking Type:" field has a dropdown menu with "[None]" selected and a note "If [Other], then enter name:". The "Author:" field has a text input field with "Anonymous". The "Status:" field has a dropdown menu with "Draft" selected. The "Classification:" field has a dropdown menu with "Not Approved" selected. Below these fields is a large "Contents:" text area. At the bottom, there are two "File Attachment" fields, each with a "Browse..." button. Below the attachments, there is a "Document Access and Edit Log" section with a dropdown menu for "Who can read this document:" set to "Default" and a note "(select everyone, author, or the name of a team)". Below that is another dropdown menu for "Who can change this document:" set to "Author & Project & System Mgrs" and a note "(select author, or the name of a team)". A "Submit" button is located at the bottom left.

Meeting Minutes

The meeting minutes form is intended to allow you to document the outcome of formal project meetings such as design reviews.



The screenshot shows a web-based form titled "Project Document" with a "Close" button in the top right corner. The form contains several fields with dropdown menus:

- Title:** [dropdown]
- Project:** [dropdown]
- Tracking Type:** [dropdown]
- Author:** [dropdown] (selected: Gary M. Cole/MarinResearch)
- Status:** [dropdown] (selected: Draft Not Approved)
- Classification:** [dropdown]
- Meeting Held On:** [dropdown] (selected: 11/25/2001)
- People Present:** [dropdown]
- Results:** [dropdown]
- Action Items:** [dropdown]

At the bottom of the form, there is a section titled "Document Access and Edit Log" with a right-pointing arrow icon.

Meeting Held On

Enter the date of the meeting.

People Present

Enter the attendees. If any are serving as proxies for their managers, then their role should be identified.

Results

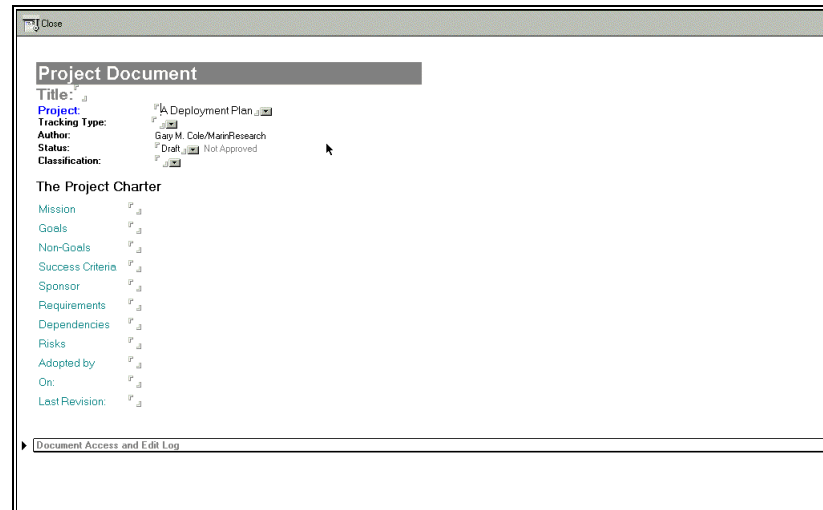
Describe the outcome of the meeting and attach any documents that were written or approved.

Action Items

What specific items have been assigned to participants for additional follow-up. Some of these may be created as issues or assignments or new scope changes.

Charter

A project charter should be created at the beginning of a new project. The purpose of the charter is to carefully spell out exactly what is the purpose of the project.



Mission

The mission statement should provide a purpose for the project and the benefit the project's completion will provide for the enterprise.

Goals

This should be an explicit listing of the goals of the project. These goals should be measurable, not vague. *E.g., A goal of the project is to reduce the response time of the order status application from the current 5 seconds to approximately 2 seconds.*

Non-Goals

This should spell out what you are NOT going to do but which might be expected based upon the name of the project or the funding level. *E.g., It is not a goal of this project to improve the user interface of the order status application.*

This is very important because it provides a layer of defense for the project team from outsiders who want more than can be delivered within the budget. The only proper way for a Non-Goal to become a goal after the project is underway is by the use of an approved scope change.

Success Criteria

How can others tell if the project was a success? This should be part of the project charter so that, when the project is completed, there is a fair

basis for assessing it. A reasonable criteria might be to complete the project within 2 weeks of the target date and 15% of the targeted effort.

Sponsor

Who is backing this project? Name names as well as budget categories. If the people you list are not really behind you, it is better to find out now.

Requirements

What do you need to succeed? Name the people, services and resources you are depending on. Simply putting work assignments into a project schedule does not really mean that those resources will work on your project! All the truly critical assumptions should be put here.

Dependencies

What other projects or business developments are you counting on as part of your plan? Many projects get into trouble because of undisclosed dependencies. Some of these may be external such as the availability of software development tools or reliable libraries. Often the quality of the dependent item comes into the picture.

Risks

This is a first pass at your risk management process. What kinds of problems can you, at the outset, reasonably foresee. What can be done about them?

Adopted by:/On:

This should list the members of your project council who have read and agreed to this charter. Your project council should include a management representative of your customer as well as your key resources.

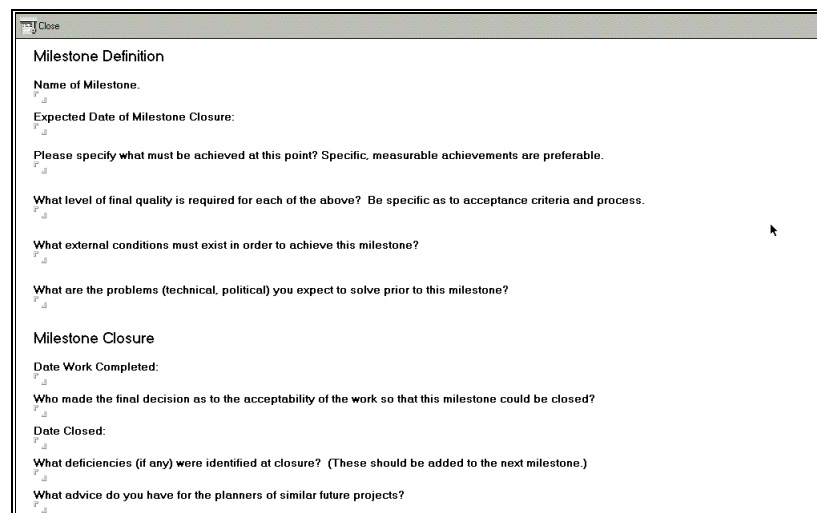
Last Revision:

Whenever this charter is revised, enter the effective revision date. This may be different from the actual date on which the project document is updated.

Milestone Definition

A milestone definition document should be created for each milestone in the project. Your collection of milestone definitions should encompass all of the goals stated in the project charter, but provide more detail and specific timing. Generally milestones should be scheduled about 2 weeks apart.

By clearly defining the intended state of the project at each milestone, you make it much easier to track the project and greatly reduce the level of effort needed in creating the project work assignments. In fact, most task assignments can be reduced to something like "Work on Milestone 2."



The image shows a screenshot of a "Milestone Definition" form. The form is titled "Milestone Definition" and has a "Close" button in the top left corner. It contains several sections with text input fields:

- Milestone Definition**
 - Name of Milestone:
 - Expected Date of Milestone Closure:
 - Please specify what must be achieved at this point? Specific, measurable achievements are preferable.
 - What level of final quality is required for each of the above? Be specific as to acceptance criteria and process.
 - What external conditions must exist in order to achieve this milestone?
 - What are the problems (technical, political) you expect to solve prior to this milestone?
- Milestone Closure**
 - Date Work Completed:
 - Who made the final decision as to the acceptability of the work so that this milestone could be closed?
 - Date Closed:
 - What deficiencies (if any) were identified at closure? (These should be added to the next milestone.)
 - What advice do you have for the planners of similar future projects?

Name of Milestone

This should be the same name you use on the milestone event in your project schedule. Note that in most cases, these documents should be created before you construct a final task plan.

Expected Date of Milestone

When planning, you should be able to specify an approximate date. If you cannot pick a date, you really need to think more about the project.

Please specify what must be achieved at this point

If you are building software, what modules will be complete at this point? What set of features should be complete, what features should be still under construction?

If you are redesigning a business process, what final documents will have been approved by the customer?

If you are creating hardware, what should be available (breadboard, prototype, production pilot?) at this point?

Include both tangible items such as graphic design, and intangible ones such as decisions.

What level of final quality is required.

This is an essential, but often difficult thing to define. Each of your intended achievements should have some quality criteria. If you cannot assess quality, how do you know you have actually accomplished the milestone?

The purpose is to define the expected level of quality, not to insist on perfection. If you expect to have a functioning prototype with everything working except the help commands, then say so. If you expect to have no more than 25 open defects, say so.

If you do not know what to expect, then think about the project some more and ask your peers about their experiences in previous work.

What external conditions must exist in order to achieve this milestone?

Are you assuming that a contract will be signed? A resource will be hired? A team member will have completed a training program? A server will be fully operational?

Each milestone is defining a transition point in your project. You not only need to specify what will have been achieved to date, but also those things that must be in place so that you can proceed to accomplish the next milestone in the project.

What are the problems you expect to solve prior to this milestone?

At the start of each project you should be able to make a list of problems to be solved. Some of these will be technical while others may be political or contractual. For each milestone, list the problems that that should be solved at that point in the project.

Milestone Closure Information

Date Work Completed

This should be the actual date when all of the work was finished, rather than the date at which you update this document.

What made the final decision as to the acceptability of the work so that this milestone could be closed?

Milestones are serious things that represent a formal statement of progress. If you define all of the items listed above, then you should make sure that they are completed as planned and that there is management agreement to this effect.

Date Closed

This is the date at which you have completed the assessment of the milestone and formally declare its completion.

What deficiencies were identified at closure?

Any of the items listed in the first section that have not been achieved should be listed here (and added to the next milestone). This includes both complete omissions as well as items that are of inadequate quality according to the pre-planned criteria. The fact is that most milestones in large projects will have some deficiencies at closure. By keeping careful track of these, you can build a case for project schedule and or budget changes.

What advice do you have for planners of similar future projects?

What have you learned so far? What is taking too long? What is proving difficult to measure? What decisions are proving to be bad ones? What do you wish you had thought of when you defined this milestone?

Document Tracking

The document tracking facility built into Project Gateway can help you identify the relationship between project tasks and deliverables and ensure that important documents do not become overlooked in a busy work environment.

The Document Tracking facility consists of the following components:

1. A section in the assignment documents that provides fields to identify which types of documents are created or required by each assignment.
2. A processing step in the Project Gateway create/synchronize system that allows detailed document requirements to be imported from project plans developed with any project management application or with the Repository Schedule form.
3. Project Document forms used to hold project work.
4. A set of views and reports which let you locate the project documents and show the association between documents and project assignments. This includes the project "ToDo" report that shows required and missing documents on the project calendar.
5. An agent, called the Project Go! Document Tracking Agent which automatically monitors the status of documents vs. project requirements and will alert the project manager to missing or incomplete deliverables via email
6. A section in the Project Profile form which provides specific instructions to the Document Tracking Agent for each particular project.

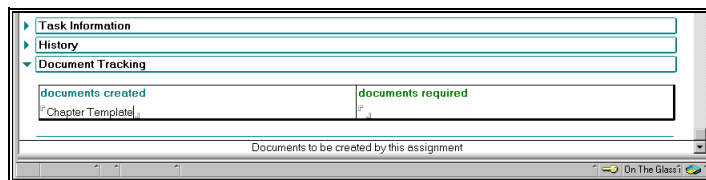
Associating Project Documents with Project Assignments

At the end of the Assignment Document form is a collapsible section entitled "Document Tracking".

Expanding this section reveals a table containing two lists. The list on the left is labeled "documents created" and the list on the right is labeled "documents required."

Unless the project plan has pre-specified documents for this task, these fields will be initially empty when the assignment document is created.

To associate a project document with an assignment, you enter the "document type" into the appropriate list. If one of the objectives of this task is to create a Chapter Template, then you would enter "Chapter Template" into the documents created field.



On another assignment later in the project you might need the Chapter Template to be available. On this assignment you would enter "Chapter Template" into the documents required field.

Any number of different documents can be created or required by a single assignment document. For example, a milestone at the end of a phase might identify "Project Budget", "Functional Spec", "Design Proposal", "Customer Support Plan" as documents required.

Project Gateway interprets your information as follows:

1. If an assignment "creates" a document type, then there should be a Project Document in the database, for this project, of this type, at the time the assignment is marked finished.
2. If an assignment "requires" a document type, then there should be a Project Document in the database, for this project, of this type, at the time the assignment is planned to start. Furthermore, at the time this assignment is actually complete, this required document itself should be marked complete.

Automated Document Tracking

The Document Tracking periodically examines every assignment in the project that creates or requires documents. When its examination of the project is complete, if any problems are noted, it will send a single email to the project manager listing the problems noted in that project.