

Implementing Document Tracking

Overview

Project Documents are part of the work product of the individual projects being done such as functional specifications, engineering drawings, sample templates, etc. that are created as part of a project.

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

The Document Tracking facility consists of five 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. The rules for how to encode these requirements in your project plans are found in this chapter.
3. The Project Document forms. Described in the Repository User Manual chapter "Using Project Documents." A set of views and navigator entries which let you locate the project documents and show the association between documents and project assignments.
4. An Agent, called the Project Go! Document Tracking Agent (DTA) which automatically monitors the status of documents vs. project requirements and will alert the project manager to missing or incomplete deliverables.
5. The Document Tracking Agent Profile section in the Project Profile form. It provides specific instructions to the Document Tracking Agent for each particular project. This is described in the Repository Users Manual in the chapter.

Importing Document Specifications from Project Plans

When a project plan is imported by Project Gateway, the plan is checked for document tracking specification. If these are found, they are automatically entered into the documents created or documents required fields of the applicable assignment documents. By putting this information into your projects and templates, newly published projects will have document tracking built in.

Note: This mechanism is built into the Schedule Template generation process. No additional setup is required. However, when schedule templates are generated as .M2K files, the document tracking specifications in the template design will appear in the Notes field of the Microsoft Project task in the format below.

In your project management system, you need to put document tracking instructions into a text field associated with the task. These instructions are written in the following way:

How to Write Document Tracking Specifications

To indicate a required document named "Quality Plan" you enter the phrase

::Quality Plan

<colon><colon>Quality Plan<double space or end of line>

To indicate a created document, include an asterisk

::*Quality Plan

<colon><colon><asterisk>Quality Plan<double space or end of line>

If several documents are needed, use multiple specifications. Each begins with a double colon ::

::*Quality Plan, ::Project Budget, ::Functional Spec

This says that the task creates Quality Plan, requires Project Budget and requires Functional Spec.

Where to Write Document Tracking Specifications

Microsoft Project	Task Notes, Text1...Text10**
ABT Workbench	Task Notes, Deliverables
Primavera	Aux1... Aux9 fields
Time Line 6	Task Notes, Aux 1... Aux9
Open Plan	User_char01...User_char10

** The text column must be in the Export Table Definition in MS Project 98.