



# IT Project Management

## Lecture 2-4 – Documentation

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# Documentation



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2. Reasons
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# Project Documentation

- **Project documentation**: covers the compilation of selected substantial data concerning configuration, organization, resources, approaches, schedule, and aims achieved of the project [DIN 69901-5:2009-01].
- Documents typically created in a project
  - Project order
  - Project plan
  - Project handbook
  - Project profile
  - During project lifecycle: minutes, status reports
  - Final project report

# Project Documentation

- Project documentation includes
  - initial situation and problem description
  - exposure of the course of the project (e.g., project reports)
  - description of the solution approach being applied
  - project costs
  - realized benefits
  - project closure report

# Objectives of Documentation

- Goals of documentation in a project are:
  - Presentation of project results
    - for the principal,
    - for the project team.
  - Presentation of the current status of the project
    - including the status of all work packages and tasks.
  - Traceability and measurability
    - What has been achieved with what effort?
    - Controlling: budget target-actual comparison
  - Increasing the quality
    - When documenting the facts of a case, one looks deep into the subject and as a result the quality improves automatically.

# Objectives of Documentation

- Non-goals:
  - Documentation as an end in itself
    - Documentation should always fulfill a purpose
    - Who needs a specific document and why?
    - Costs and benefits should be balanced
  - Only formal completion of documentation criteria
    - Content is important
    - Risk: Assuming that a degree of quality has been achieved simply because all related documents have been created.
- To be distinguished:
  - Documentation of the project
  - Documentation of the project product (e. g. software)



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# Reasons

- Why is project documentation important?
  - Quality management norms like the ISO 9000 standard series require corresponding documentation [ISO20].
  - Documentation is required in some projects because of statutory liability and/or warranty obligations.
  - Discussions and contradictions can be prevented by prompt documentation of
    - assignment/approval of tasks,
    - responsibility for the tasks assigned,
    - conditions that apply for a task, and so forth.
  - Documented decisions prevent repetitive discussions and give much more reliability to the project.

# Reasons

Basis for the following topics

- Transparency
  - A general accessible documentation results in transparency for all project participants and facilitates traceability, for example, concerning decisions taken in the project.
  - Hint: Some access restrictions for specific documents are well justified, e.g., concerning financial aspects, or in strategic projects
- Support for learning organizations for improvements
- Plan optimization for current and follow-up projects in the company

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# Requirements

- Everybody in the project should be able to get an access and overview of the documentation.
- Standards to be offered, e.g., in form of templates.
- Tasks, ideas, decisions, and minutes of working sessions/regular communication are accessible at a certain place.
- A person is responsible to take care of the documentation or, preferably, take care of the quality of documentation.
- Company-wide standards are considered, such as corporate identity, style guides

# Requirements

- The project documentation should be centrally accessible. In an IT infrastructure, this could be:
  - Common project drive
  - Common internet or intranet presence
  - Central Wiki
  - Content management system
  - Document management system

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# Scope

- Scope of documentation depends on the kind and size of the project.
- A complete project documentation typically could be found as project handbook in a (digital) project file
- Working package documentation
  - Basic for the documentation in the project
  - Minutes, status reports, and final documentation
  - Responsible: Work package leader
- Final documentation
  - At the end of the project all project relevant documents are needed
  - A project document overview/checklist helps that these documents originate in time during the project



# Scope

## Example for project document overview / checklist

No.	Document	Project area	Location	Responsible	Status
1	Project contract	Project management	Server1/Project/ Projectcontract	Customer	
2	Project handbook	Project management	Server1/Project/ Projecthandbook	Project manager	
3	Requirement specifi- cation document	Project management	Server1/Project/ Specification	Project manager	
4	Technical specification document	Project management	Server1/Project/ Specification	Vendor	
5	Project plan	Project management	Server1/Project/ Plan	Project manager	
6	WP status reports	Work package	Server1/Project/ AP/Status	WP leader	
7	Project status reports	Project management	Server1/Project/Status	Project manager	
8	WP meeting minutes	Work package	Server1/Project/ WP/Minutes	WP leader	
9	Meeting minutes	Project office	Server1/Project/Minutes	Project office	
10	Decisions	Project office	Server1/Project/Minutes	Project office	
11	Acceptance protocol	Project management	Server1/Project/ Acceptance	Customer	
12	Final report	Project management	Server1/Project/ Completion	Project manager	

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# Project Profile

**Project profile** (*Synonym one pager*): short summary of a project, presented on one page.

- contains most important facts about the project
- serves as an overview, e.g., for
  - project kickoff.
  - general presentation purposes
  - presentation of the project progress with the most important project status information.

# Project Profile

## Example for a project profile

### Project One Pager

Project name	<Name of project>	Project No.	<Number of project>
Principal	<Name of principal>		
Project Board	<NN 1, NN 2, ... , NN 7>		
Project manager	<Name of project manager>		
Project team	<NN 1, NN 2, ... , NN 7>		
Stakeholder	<Anyone who affects or is affected by the project>		
To be informed	<Anyone who should be informed about the project>		
Supplier	<Anyone to support the project on request by order, e.g. external companies>		

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# Project Handbook

- Project handbook** (***Synonym project manual***): contains fundamental project information as well as contact persons and the project organization.
- It describes the processes, project details, and the results of the project planning phase.
  - Responsibility to create and to maintain a project handbook is typically with the project office.
  - A project handbook could be a whole document or digital available, e.g., in a Wiki or document management system

# Project Handbook

## Example for list of contents of a project handbook

1. Overview / Summary / Glossary
2. Project strategy
  - a. Project order
3. Project planning
  - a. Project plans (Work breakdown structure, ...)
  - b. Project milestone plan
  - c. Kickoff
4. Project execution
  - a. Status reports
5. Project closure
  - a. Final project report
  - b. Final project closing event
6. Appendix / sources

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# Summary



- Many process models and standards like ISO 9000ff require a corresponding documentation
- Use documentation for transparency of a project
- Good quality of documentation concludes a good quality of the project
- A project document overview/checklist could help to organize document creation and to achieve a good quality
- A project profile shows a project summary
- A project handbook gives orientation for all project members