

Software Project Management

Lesson 9 – Documentation

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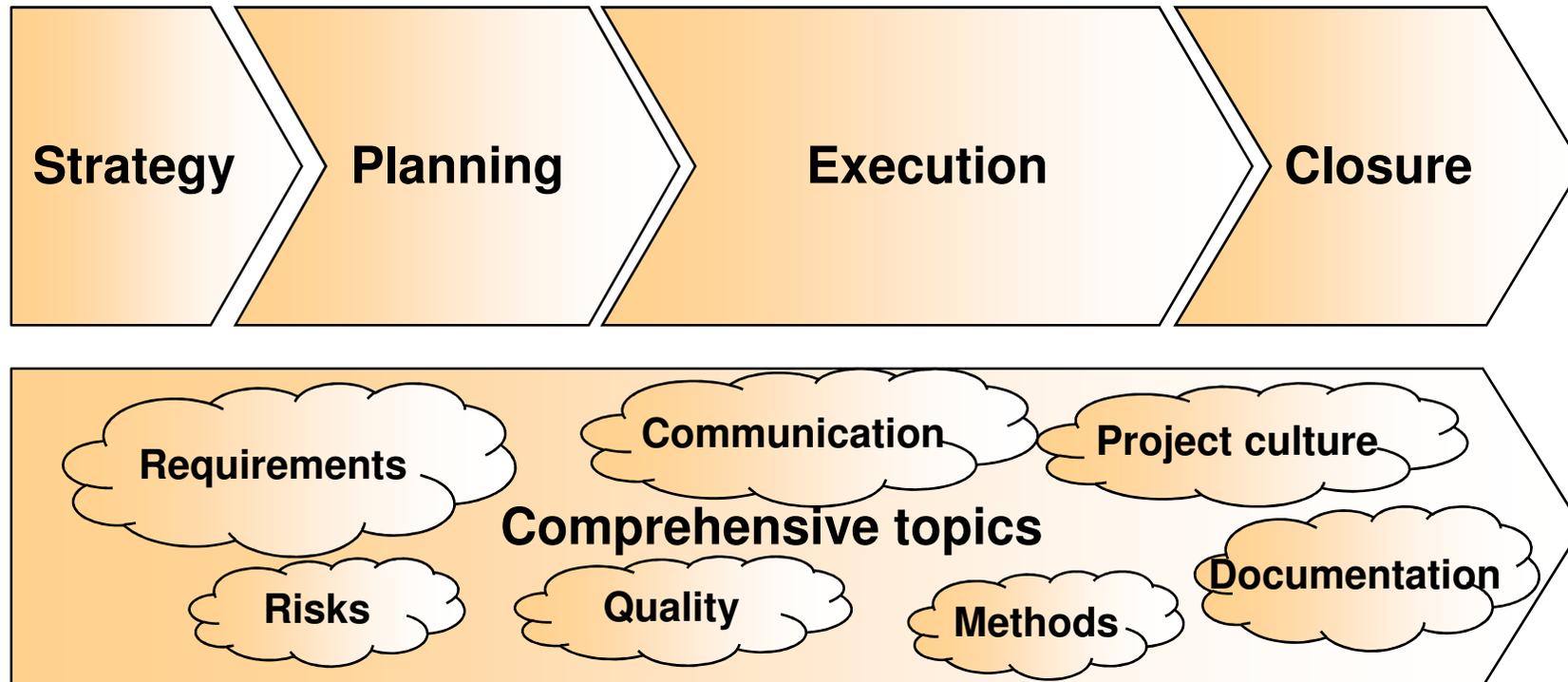


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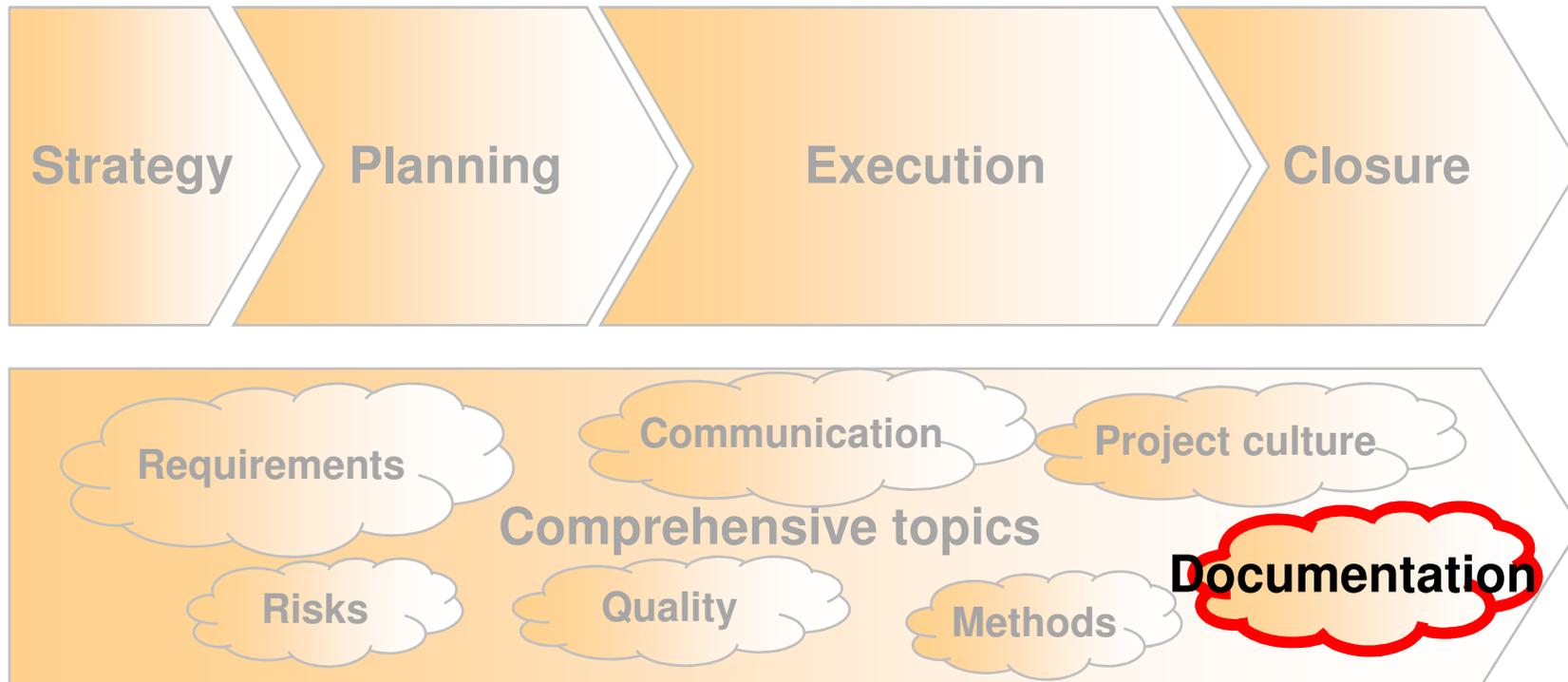


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Introduction



Introduction





Introduction

- Why is documentation important in a project?
For whom is documentation?
- What has to be documented?
- How detailed and comprehensive must be documented?



Discussion



Goal / Results

Goals of documentation in a project are:

- Transparency – Enable traceability of the project
- Presentation of project results
 - for principal / customer
 - for project team
- Presentation of current project status
 - continuous documentation of status of all work packages and tasks
- Traceability and measurability
 - What has been decided, approved, discussed?
 - How much budget has been used for which topics?
 - What has been achieved with which effort?
- Increasing of quality

Goal / Results



- Non-goals of documentation
 - Documentation should not become an end in itself.
 - Documentation should always fulfill a purpose
 - Who needs a specific document and why?
 - Costs and benefits should be balanced
 - Formal fulfilment of documentation criteria
 - It is not sufficient that documents only exist
 - Content is important
- Differ the documentation of the project from the documentation of the project product (e. g. software)

Goal / Results



- Typical results of documentation are
 - Project handbook in a (digital) project file including project profile (“One pager”)
 - Project order including situation analysis, environment analysis
 - Project plan
 - During project lifecycle: Minutes, status reports
 - Final project report



Definition

- Following DIN the project documentation is a collection of data about configuration, organization, use of resources, solutions, process and achieved objectives of a project [DIN09]
- Documentation covers a description of the initial situation, presentation of the course of the project, description of the solution, costs, and project closure report



Reasons

- Documented decisions prevent repeating discussions, give confidence
- An open documentation gives transparency and facilitates traceability
- Real-time documentation saves a lot of trouble
- ...
- Documentation is necessary to conform legal accountability / warranty deed
- ISO 9000ff requires corresponding documentation [ISO15]



Reasons

- Depending on the project process model a defined set of documentation is required
- Documentation is basic for
 - Plan optimization
 - Support of a learning organization
To be considered: It's not enough to document only measures out of a lessons learned workshop
 - Transparency in the project

Requirements



- Everybody in the project should be able to orient!
- A documentation standard should be established (templates)
- Tasks, ideas, decisions, minutes from meetings / regular communication should be located at one place
- A responsible person should care about the documentation and (better) about the quality of the documentation

Scope



- 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



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

Example for a project handbook (extract)



Scope

Project One Pager

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

Example for a Project Profile / Project One Pager
(extract)

Scope



No.	Document	Project area	Location	Responsible	Status of document
1	Project contract	Project management	Server1/Project/ Projectcontract	Customer	
2	Project handbook	Project management	Server1/Project/ Projecthandbook	Project manager	
3	Requirement specification 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	

Example for project document overview / checklist

Summary



- Many process models and standards like ISO 9000ff require a corresponding documentation
- Use documentation for transparency of a project
- A project handbook gives orientation for all project members
- 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

Sources



- [AG16] Daud Alam, Uwe Gühl: Projektmanagement für die Praxis, Springer Vieweg Berlin Heidelberg, 2016 (in German)
- [DIN09] Deutsches Institut für Normung e.V.: DIN 69901 Projektmanagement; Projektmanagementsysteme, 2009
- [ISO15] International Organization for Standardization (ISO): ISO 9000 - Quality management, 2015,
http://www.iso.org/iso/home/standards/management-standards/iso_9000.htm