KEEPING COOL WITH
PROJECT
DOCUMENTATION

PM Brown Bag
September 28, 2010

Printed version note: This was one of the hottest days of the year. Enjoy the cooling images!
What Do You Mean By “Documentation?”

- PM artifacts are the base record
- Communication to your future constituents
- Written record of the project
- Only counts if someone ELSE can get to it
- Reports, change docs, analysis, formal communication
What Should Be Documented?

- Standard PM docs are most common research target
- How decisions were reached
- Architecture, configuration, application details
- Lessons learned
- Business process docs
- Formal documentation (reports, handoffs, artifacts)
A Few Guidelines

- As short as possible and still contain your data (or use an executive summary)
- Make sure it’s something someone will want to see
- Don’t reinvent the wheel
- Document as you go
- Capture as part of your project plan
### Project Templates page

[http://its.ucsc.edu/pmg/project_templates.php](http://its.ucsc.edu/pmg/project_templates.php)

<table>
<thead>
<tr>
<th>Size</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Proposal</strong></td>
<td>Initial document for a project request.</td>
</tr>
<tr>
<td>141K</td>
<td></td>
</tr>
<tr>
<td><strong>Project Charter</strong></td>
<td>Formal project request document defining scope, objectives and deliverables.</td>
</tr>
<tr>
<td>136K</td>
<td></td>
</tr>
<tr>
<td><strong>Project Steering Committee Charter</strong></td>
<td>Formal document template for charging a project steering committee.</td>
</tr>
<tr>
<td>40K</td>
<td></td>
</tr>
<tr>
<td><strong>Project Charter Budget</strong></td>
<td>Supplemental Project Charter document in MS Excel format</td>
</tr>
<tr>
<td>19K</td>
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</tr>
<tr>
<td><strong>Project Status Report</strong></td>
<td>Supplemental project artifacts for use once a project has been approved.</td>
</tr>
<tr>
<td>135K</td>
<td></td>
</tr>
<tr>
<td><strong>Project Issues/Risk Log</strong></td>
<td>Supplemental project artifacts for use once a project has been approved.</td>
</tr>
<tr>
<td>139K</td>
<td></td>
</tr>
<tr>
<td><strong>Project Resource Requirements by Work Package</strong></td>
<td>Supplemental project artifacts for use once a project has been approved.</td>
</tr>
<tr>
<td>137K</td>
<td></td>
</tr>
<tr>
<td><strong>Project Resource Requirements by ITS Unit</strong></td>
<td>Supplemental project artifacts for use once a project has been approved.</td>
</tr>
<tr>
<td>90K</td>
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</tr>
<tr>
<td><strong>Work Package Document</strong></td>
<td>Supplemental project artifacts for use once a project has been approved.</td>
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<tr>
<td>72K</td>
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<tr>
<td><strong>Project Change Control Request</strong></td>
<td>Supplemental project artifacts for use once a project has been approved.</td>
</tr>
<tr>
<td>134K</td>
<td></td>
</tr>
<tr>
<td><strong>Project Closure Review</strong></td>
<td>Supplemental project artifacts for use once a project has been approved.</td>
</tr>
<tr>
<td>138K</td>
<td></td>
</tr>
<tr>
<td><strong>Project Software Tools</strong></td>
<td>The model tool for project management for Mac OS X.</td>
</tr>
</tbody>
</table>

**Merlin (Mac)**
**Reminder of Resources**

- **Project Templates page**
  [http://its.ucsc.edu/pmg/project_templates.php](http://its.ucsc.edu/pmg/project_templates.php)

- **ITS Project Document Library**
  [https://collab.ucsc.edu/its-group-spaces/portfolio-management-group/draft-project-docs](https://collab.ucsc.edu/its-group-spaces/portfolio-management-group/draft-project-docs)

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### ITS Project Documents

**by Marion Bashista** — last modified Aug 26, 2010 06:16 PM

A compendium of project documents received to date. Also included are additional project reports and other associated documents.

If you have document updates or new documents to add, please contact Marion Bashista at (831) 459-1614.

<table>
<thead>
<tr>
<th>project</th>
<th>project manager</th>
<th>proposal</th>
<th>charter</th>
<th>budget</th>
<th>change control</th>
<th>close</th>
<th>additional reports and documents</th>
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</thead>
<tbody>
<tr>
<td>Instructional Technology Review - Service Catalog Report</td>
<td>Bruce Horn</td>
<td>Proposal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Catalog Report, Appendix B, Appendix C, Appendix D, Appendix E</td>
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<tr>
<td>Asset Management</td>
<td>Aaron Margules</td>
<td>Charter</td>
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<td>Service Catalog</td>
<td>Aaron Margules</td>
<td>Charter</td>
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<td>Defining and Delivering an SBA/DODSLA</td>
<td>Ann Berry-Kline</td>
<td>Proposal</td>
<td>Charter</td>
<td></td>
<td>Change 1</td>
<td></td>
<td>Next Services Report, Final Report</td>
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<td>Campus Calendar</td>
<td>Brigitte Pant</td>
<td>Charter</td>
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<td>Change Management - Phase 2</td>
<td>Charles Mckinley</td>
<td>Proposal</td>
<td>Charter</td>
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<td>Change 2</td>
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<td>Astrophysics Provisioning</td>
<td>Chuck Greer</td>
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<tr>
<td>CrustMail - List Management</td>
<td>Jane Nyberg</td>
<td>Proposal</td>
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<tr>
<td>CrustMail - Secure Email</td>
<td>Jane Nyberg</td>
<td>Proposal</td>
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* Contact PMG
  pmg@ucsc.edu
A Few Highlights
1.1 High Level Functional Requirements

These high level functional requirements were provided by Jim Burns, Director Public Information Office. The application must:

- maintain current functionality
- accommodate minor functional enhancements
- be extensible to accommodate future enhancements
- be stable and secure
- be compatible with system architecture/infrastructure
- support legacy files and search function (press html pages)
- be easily supportable by ITS who can therefore be responsive to PIO

1.2 Overview of Current Application Functionality

The News and Events application allows staff writers to submit articles (news articles, administrative messages, etc.) on-line. Articles can be tagged with different categories which determine where the articles appear on the web site.

XML files for RSS feeds are created based on these categories as well. Most XML files are re-built as the articles are created or edited. The Currents Online RSS feed, however, requires a special pages on which an Issue Date can be entered for the magazine so the RSS feed contains information on articles only for the current magazine.

1.2.1 Application Function
A Few Highlights

Information Technology Services
Project Change Control

<table>
<thead>
<tr>
<th>Project Title: Web Service Definition Project</th>
<th>Date: 1/26/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepared By: David Turner</td>
<td>Date Approval Needed: February 11, 2010</td>
</tr>
<tr>
<td>Date Change Must Be Active: Currently Active</td>
<td></td>
</tr>
</tbody>
</table>

**Type of Change:**
- [X] Scope
- [ ] Schedule
- [ ] Cost
- [ ] Other (describe):

**Description of Change:**
Request extension of the closure date of the project, and transition of some deliverables out of the project (to service team or governance).

Original closure date was December 2009. Requested new projected closure date is April 30, 2010. This change is a result of the decision in summer quarter to slow the project down to create capacity for team members to participate in the WCMS project and other competing commitments. Since that time, this project has met less often, with the understanding that publication of service catalog information would need to be coordinated with the implementation phase of WCMS (catalog pages cannot be published until the new Web Publishing service is active, which is now scheduled for April 2010). The April close date aligns the completion of this project with the launch of migrations in the WCMS project.

In addition to the schedule change, this request identifies deliverables from the project charter that will be better executed by ongoing bodies: either the Web Services Team (to be charged), or the Web Steering Committee. These deliverables were identified in the charter prior to the creation of these ongoing teams, which are better suited to complete them.
The Web Service Definition (WSD) Project charter lists a few deliverables that are better suited to governance and service teams that have come into existence since the launch of the project.

This document serves as a formal handoff of the Service Level Agreement (SLA), Operating Level Agreements (OLA), Success Criteria, and Support Center Integration deliverable from the WSD Project to the Web Service Team.

The Web Service Team brings service providers, service management, and key stakeholders together to provide service-related input, review and manage change requests, and resolve service-related issues. Service teams typically oversee the creation of service and operating level agreements, the establishment and maintenance of service metrics, and support center integration activities. As such the service team is better suited to complete this work.

**Service Level Agreement Deliverable Description**
The WSD project charter describes this deliverable as follows:

- **Description**: Public facing service definition for available web services, including a Service Level Agreement (SLA) and inclusion in the ITS Service Catalog.
- **Client View**: What services are available, and how do I get them? How do I get support? What does it cost?
- **Work Package**: A sub-team will take the drafted service definitions and define appropriate service levels for publication to campus.

**Work to Date**
The service catalog pages have been completed by the project team. These include a “home page” describing service options, full service pages for each major service, and a variety of topic and information pages.

Service level information (e.g., uptime, response times) will be developed by the service team as the new services evolve. As such, the SLA aspect of this deliverable is transferred to the service team.

**Operating Level Agreement Deliverable Description**
The WSD project charter describes this deliverable as follows:
# Project Closure Review

**Project Title:** LANDesk / Asset Management Pilot  

**Project Manager:** Aaron Melgares  

**Client:** ITS  

**Sponsor:** Janine Roeth  

**Closure Criteria:**  
- SMT approved project closure at meeting on Feb. 20, 2009  
- The project has completed most assessment targets.  

**Goal Review:**  
- The project goal was met, which was to identify an asset management solution and deploy a pilot implementation to meet functional targets.  
- This project required close collaboration and communication among several ITS units during a period of continual change for the organization. It was difficult to sustain this over a long period.  

**Deliverables Review:**  
- Deliverables were partially achieved. Some targets were simply not a priority given the resource constraints of the project. The requirements of ITS and desktop support evolved over the three year lifespan of the project and we were not always accurate in predicting what would be the most useful features of LANDesk.  
- The tracking of Windows server hardware and software assets was the most significant deliverable that was not achieved. Core Tech went through reorganization during the project that resulted in changed priorities and tools.  
- Deliverables were re-scoped several times to adapt to the changing ITS organization and priorities.
In General

Anticipate Need
Where Do the Docs Go?

- First and foremost, Project Library
  pmg@ucsc.edu
- Collab, shared drives, server, other service team resources
- Project website where applicable
- Distribute to team members
Snow Monkeys