quint-essenz

Documentation system
Version: 1.5 / 01.06.2006 / 1

Documentation system for projects

Use

A good documentation system is vital for each project phase and for all areas of the project. A well organized and systematic documentation system simplifies internal and external communication and facilitates the task of a substitute project leader in case of absence or illness or if the project leadership changes in the course of the project. This tool contains hints and tips on how to improve the documentation system of your project.

Types of documents

In projects we can distinguish different types of documents:

(a) Documents produced within the project (internal documents) or external documents
(b) Uniquely created documents or documents that are continually or sporadically updated during the ongoing working process
(c) Templates
(d) Publicly available documents or confidential documents
(e) Printed or electronically stored documents
(f) Documents based on text, sound, visuals or film
(g) ...

Examples:

- Documents regarding tasks and duties (description of tasks, contracts with third parties, mandates from clients)
- Documents for project administration (budget, accounts, address lists)
- Planning documents (planning charts, structural charts)
- Documents for planning and evaluating effects (feedback systems, milestone reports, intermediate reports, evaluation reports, final report)
- Correspondence (letters, e-mails)
- Templates (for letters, protocols, reports)
- Publications in the printed press (press reports, articles, posters, brochures, books, research and project reports)
- Publications in the non-print media (radio or TV reports, internet pages)
- Photos, drawings, diagrams
- Cassettes and films

quint-essenz

Documentation system
Version: 1.5 / 01.06.2006 / 2

Identification of documents

Headers and footers

Every document generated within the project should contain the following minimal information in its header or footer (in the case of letters or e-mails this information may be contained in the text):

- Version number
- Date (last update)
- Authors (including the institution)
- Page number
- Remarks regarding copyrights (if applicable)

Naming of documents

Name your documents in a consistent and uniform way (for electronic documents in particular). Avoid abbreviations that are not universally understood and names which have little meaning. Add the version number to the name of your document.

Document administration

Storage

Advantages and disadvantages of a central location as opposed to a scattered and peripheral location have to be carefully considered. The storage of documents depends on the type of collaboration within the project team. If the same documents are stored in different places, rules must be established for matching and updating the different versions.
If members of the project team are working from different locations, electronic data may be stored on a centralized password protected server. The exchange of important external documents that are not available in electronic form is greatly facilitated if they are scanned. The scanned version functions also as a back-up.

Organization

Follow one and the same logic wherever you store your documents: on your PC, hanging desk drawer organizers, files. If possible, use some colour coding for marking the different types of documents.

Maintenance

There must be rules for deleting and erasing old versions of documents. It is usually enough to keep the latest version of a document. Sometimes it is informative to store old versions, as they show up and document progress (i.e. in the formulation of objectives or strategies) very usefully. The progressing versions of planning charts and structural charts should always be stored.

Security

The usual security measures apply to all electronic documents. An absolute must is the storage of secure copies on an external data carrier (or on local or external servers on the internet) and the regular checking of all documents with an anti virus programme! Both for Windows and MacOS some good software solutions are available.

For backup purposes it is advisable to establish several backup sets which are rotated on a pre-defined schedule.

Under the function "Cumulative Archiving/Backup" of all document versions, you have the option to select older/earlier versions of the backup sets (e.g. in case of a virus infection).

Some backup sets should be stored in a different location (for the case of catastrophic situations such as fire or flooding).

Quality aspects of your documentation system

- Uniformity
- Classification
- Intelligibility (for the project team, the administrative staff)
- Completeness
- Few redundancies
- Consistency
- Fast accessibility
- Actuality
- Protection against loss