Project Documentation

To enable better information/knowledge sharing and record keeping, all project documentation is to be stored in a repository with a consistent structure. This includes formal artefacts as well as informal working documents.

**The standard repository for PM&C Projects is a ShareHub Project Collaboration site.**

New Project Sites can be requested via the Enterprise Project Support (EPS) Team.

Project Collaboration Sites provide a standard document structure aligned with the Project Management Framework. This structure includes a library set of 1st level folders to prompt consistent storage of project information. Project Sites include the following document libraries:

**Document Libraries:**

* Concept Definition
* Business Case
* Benefits
* Governance & Controls
* Business Change
* Initiate Plan
* Procurement
* Business Requirements
* Execute Delivery
* Closure

**Site Requests**

To request a new ShareHub Project Site, send an email to the Enterprise Project Support

(E: eps@pmc.gov.au):

* Project Name
* Project Manager’s Name
* Name and logon Id of all people who will need to contribute to the site. This should include all team members as well as any key stakeholders.

The EPS will assign a unique project id and arrange for a site to be created. Project Site requests may take up to 5 business days to be established.

**Guidelines for storing project documentation**

The above structure may not be required for all projects, but will be available, so use the libraries as required to suit your project. First level folders have been included in the standard site; however these folders may be added to, or renamed, to suit a particular project. One further level of sub folders may be added at the discretion of the Project Manager and Project Team members, to appropriately store related content. There is a system constraint to only have **two folder levels** for any project, to enable migration and connection to the record keeping system.

The table below provides some examples of the artefacts and type of information to be stored in each library & folder:

|  |  |  |
| --- | --- | --- |
| **Document Libraries & description** | **Level 1 Folders** | **Examples of information to be stored** |
| **Concept Definition**  *Information relevant to defining/justifying a new initiative and seeking approval to initiate a project.* | Concept Planning | * Concept paper * Discovery questionnaire * Completed Stage Gate 0 checklists * Any working documents relating to defining the project initiative |
| Business Case | * Business Case * Working drafts to support business case |
| **Benefits**  *Information pertinent to managing benefits throughout a project which covers benefit identification, definition, tracking, realisation and optimisation.* | Benefit Management | * Benefit planning documents * Investment Logic Maps * Benefit profiles * Benefits Realisation Plan * Benefits tracking and measuring data * All benefits related documents throughout the life of the project and beyond |
| **Governance & Controls**  *Information relating to the governance and control mechanisms for a project* | Meetings | * Project Board minutes and agendas |
| Organisation Structure | * Project Board Terms of Reference * Roles & Responsibilities specific to a project |
| Reporting | * All reporting documents, such as Highlight/Progress Reports, Exceptions Reports |
| Controls | * Project Control Register (for Risks, Issues, Changes, etc) * Issues Reports * Change Requests * Quality assessment outcomes |
| **Business Change**  *Information to support delivering the required business change outcomes expected by a project* | Change & Communications  Training | * Change Impact Assessments * Communications Plan * Training Plans & Products * Change & End User Support Plan * Stakeholder engagements or correspondence * Any specific communications or change products * Working drafts of comms/change/training products |
| **Initiate Plan**  *Information focused on all planning activities for a project.* | Project Planning | * Project Plan * Project schedules * Product Breakdown Structure * Product Descriptions * Completed Stage Gate 1 Checklists * Any working documents relating to undertaking the planning phase of a project |
| Stage Planning | * Stage Plans * Stage schedules * Any working documents relating to undertaking the planning phase of a particular stage   *May have a separate folder for Stage 1, Stage 2, etc* |
| **Procurement**  *Information about all procurement activities throughout all stages of a project* | Procurement | * All procurement related documents such as RFQ/RFT, Statement of services, delegate approval, contracts, work orders   N*ote, this Document Library/folder may require limited permission/access if sensitive material to be stored* |
| **Business Requirements**  *Information about the business needs for a project* | High Level Requirements | * High Level Business Requirements documentation * Final Business Requirements documentation * Relevant business information gathered throughout the project |
| User Stories | * User Stories artefacts (if applicable) |
| User Scenarios | * User Scenario artefacts (if applicable) |
| **Execute Delivery**  *Any products or documents relating to managing the Execute/Delivery stage of a project* | Design | * All technical products/documentation relevant to the Design component of the project. This may include Design Specs, architecture artefacts, etc. * If the project is being delivered in Stages, consider a sub folder for each execute/delivery stage. |
| Build | * All technical products/documentation relevant to the Design components of the project. This may include, As-Built Specs, team reviews of products, etc. * If the project is being delivered in Stages, consider a sub folder for each execute/delivery stage. |
| Test | * All technical products/documentation relevant to the Test component of the project. (eg Test artefacts) * If the project is being delivered in Stages, consider a sub folder for each execute/delivery stage. |
| Transition | * All technical documentation relevant to the project. This may include Design Specs, As-Built Specs, Test artefacts, Deployment or Transition artefacts. * If the project is being delivered in Stages, consider a sub folder for each execute/delivery stage. |
| End Stage | * End Stage Reports * Any working documents relating to finalising a project stage. |
| **Closure**  *All artefacts relating to closing a project, including lessons, final acceptance, follow on actions, post implementation needs.* | Project Closure | * End Project Report * Lessons Learned Report * Post Implementation Review Plan * Formal Acceptance Certificates * Post Implementation Review Report * Any working documents relating to closing a project |

**Sensitive data**

Do not store any sensitive data within the general Project folders as this will be available to a wide audience. Sensitive data must be kept in an appropriate location, such as a restricted library or folder. There is a guide available for how to restrict access in ShareHub that can be found [here.](https://share.ssp.pmc.gov.au/tools/helpandsupport/Wiki%20Pages/Using%20Access%20Control%20in%20ShareHub.aspx)