

Project Notebook

Objective

The **Project Notebook** is a repository for all information pertaining to a project, including all documents, checklists, release notes, and prototypes. The information in the **Project Notebook** must be complete enough to support a thorough, consistent, and detailed review of all project processes. The development team creates the **Project Notebook** before requesting final approval. During the course of the project, the team maintains the Notebook as a current “snapshot” of the project by including all documents and other deliverables in it as they become available. The Contents section below summarizes **Project Notebook** contents. Also included is a Project Notebook Recommended Outline. Development teams should also use the **Project Notebook** to file any additional information not listed below.

To promote easy archiving and provide ready access to the information, development teams are strongly encouraged to maintain their **Project Notebooks** in electronic format. Teams will need to maintain an additional hardcopy **Project Notebook** for those documents, such as completed milestone checklists and signature sheets, that are not available in electronic format. Placing the electronic format **Project Notebook** on a network server provides easy access and regular backups performed during network maintenance.

All development team members must have access to the contents of the **Project Notebook**. In addition, all team members should have access to the tools used for creating the various items in the **Project Notebook**.

When the project is complete, the development team submits the **Project Notebook** as part of the project archive. Both electronic and hardcopy **Project Notebooks** should be archived. If an item in the **Project Notebook** was created with a tool that isn't an State of Michigan standard, that tool should be included in the archive as well.

Contents

- List of tools (with version numbers) used to create all items in the **Project Notebook**.
- Development Team meeting minutes
- Minutes from other project-related meetings
- All milestone checklists, with signature sheets
- All milestone presentations and any additional documents or handouts
- All milestone product releases, including pre-Alpha development releases, Alpha, Beta, Code Freeze, and Emergency releases, and all release notes
- Prototypes, with accompanying documentation
- All lists of improvements and deviations from each milestone, as submitted to the Development Team (including **Feedback Checklists** for each milestone and the **Project Plan**)
- All development team deliverables, including:
 - Project Charter
 - Product Requirements document
 - Project Concept Document
 - Product Overview
 - List of all third-party code and technology
 - Project Assumption and Impact Analysis
 - Project Schedule and Resource Estimates
 - Project Plan (also mentioned above)
 - Functional Product Specification, with all modifications and updates
 - Development, Learning, Usability, Quality, Risk, and Configuration Management Plans
 - Defect Summary
 - Launch Plan document, and all other documents associated with the product introduction
 - Release documents, including SQE Summary and ER Overview and Risk Document
- A list of all current and former team members, including contractors, their roles and responsibilities, and their countries of citizenship -- required for trademark, patent, and copyright considerations
- Contracts
- License agreements
- Non-disclosure agreements

Project Notebook Recommended Outline

- I.** Project Overview
 - A. Statement of Work (SOW)
 - B. Project Organization

- II.** Project Directives
 - A. Change Control Procedure
 - B. Acceptance Procedure and Criteria
 - C. Project Manager Roles and Team Responsibilities
 - D. Distribution List

- III.** Project Plans
 - A. Overall Project Plan
 - 1. Original
 - a) WBS
 - b) Gantt Chart
 - c) Pert Chart (CPM)
 - 2. Updated/Current
 - a) WBS
 - b) Gantt Chart
 - c) Pert Chart (CPM)
 - B. Planned vs. Actual
 - C. Resources and Staff Planning
 - D. Budget

- IV.** Project Status Reports
 - A. Weekly Report to Project Sponsor
 - B. Weekly Report to Project Team
 - C. Meeting Agendas and Minutes

Project Notebook Recommended Outline

- V.** Changes
 - A. Change Control Procedures
 - B. Change Control Log
 - C. Change Forms

- VI.** Issues
 - A. Problems / Issue Log
 - B. Lost Time Log

- VII.** Acceptance
 - A. Product Delivery Schedule
 - B. Acceptance Forms

- VIII.** Correspondence

- IX.** Personnel
 - A. Timesheets
 - B. Expense Reports