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