Document Creation and Knowledge Sharing

Vellore Institute of Technology, Chennai

Goal

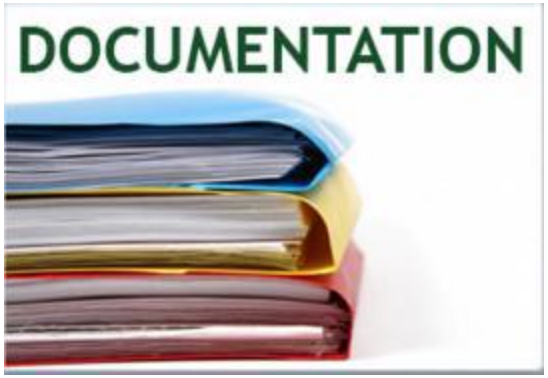
- To be aware of the various documentation techniques which are used prominently in organizations

Performance Criteria

- PC1. establish with **appropriate people** the purpose, scope, formats and target audience for the documents
- PC2. access existing documents, language standards, templates and documentation tools from your organization's knowledge base
- PC3. liaise with **appropriate people** to obtain and verify the information required for the documents
- PC4. confirm the content and structure of the documents with **appropriate people**
- PC5. create documents using standard templates and agreed language standards
- PC6. review documents with **appropriate people** and incorporate their inputs
- PC7. submit documents for approval by **appropriate people**
- PC8. publish documents in agreed formats
- PC9. update your organization's knowledge base with the documents
- PC10. comply with your organization's policies, procedures and guidelines when creating documents for knowledge sharing

Documentation?

- Set of documents provided on paper, or online, or on digital or analog media, such as audio tape or CDs.
- Examples are user guides, white papers, on-line help, quick-reference guides



Why is documentation important?

- It is essential to document the process and also any improvements made on it.
  - “As-Is Process” as well as the “To-Be Process”

- Helps the organization gain long term primary and secondary benefits

Scope for the documents

- A scope statement is one of the most critical pieces of a document, and writing one can be a difficult task for an individual.
- An effectively written scope statement can help the rest of the document flow along with minimal problems
- Used for
  - Authorizing the document
  - Providing a high level overview
  - Identifying the main stakeholders

Sample Scope Document

Project Title: Information Technology (IT) Upgrade Project

Project Start Date: March 4, 2007 **Projected Finish Date:** December 4, 2007

Project Manager: Kim Nguyen, 691-2784, *knguyen@course.com*

Project Objectives: Upgrade hardware and software for all employees (approximately 2,000) within nine months based on new corporate standards. See attached sheet describing the new standards. Upgrades may affect servers, as well as associated network hardware and software. Budgeted $1,000,000 for hardware and software costs and $500,000 for labor costs.

Approach:

- Update the information technology inventory database to determine upgrade needs
- Develop detailed cost estimate for project and report to CIO
- Issue a request for quote to obtain hardware and software
- Use internal staff as much as possible for planning, analysis, and installation

ROLES AND RESPONSIBILITIES:

Name	*Role*	*Responsibility*
Walter Schmidt	CEO	Project sponsor, monitor project
Mike Zwack	CIO	Monitor project, provide staff
Kim Nguyen	Project Manager	Plan and execute project
Jeff Johnson	Director of Information, Technology Operations	Mentor Kim

Tools for documentation

- **Microsoft Word :** For all documents where a lot of textual documentation needs to be created
- **Microsoft Excel :** Where graphs/charts or spreadsheet based tables need to be created
- **Microsoft PowerPoint :** Where you need to create presentations with a combination of data types
- **Microsoft Visio :** Where flowcharts need to be created
- **Adobe PDF Format :** Any kind of document can be converted into un-editable PDF format by exporting a document type into PDF

Case Study

- An account of an activity, event or problem that contains a real or hypothetical situation and includes the complexities you would encounter in the workplace

According to Top Rank Blog, a **case study** is: An **analysis** of a **project**, campaign, or company that identifies a situation, recommended solutions, implementation actions, and identification of those factors that contributed to failure or success.

Steps in writing case study

- Determine which case study type, design or style is most suitable to your intended audience.
- Determine the topics of your case study
- Set up interviews with subject matter experts (account managers in a corporation, clients and customers using applicable tools and services, etc.).
- Develop and write your case study using the data collected throughout the research, interviewing and analysis processes.

Format of a Sample Case Study

Cover Page
(Include employee names and employee Ids)

Executive Summary
(If appropriate – should be written last to focus on key points/findings)

Introduction
Current Situation Analysis and pertinent Background including a synopsis of the relevant information from the case analysis tool short form.

Body
May include:

- Target Market Identification
- Market Needs
- Analysis of Case
- Key Issues/Goals
- Recommendations

Should include:

- Decision Criteria
- Assumptions
- Data Analysis (analysis in appendix and summary info in body)
- Preferred Alternative with rationale.
- Justification/Predicted Outcome:
  It is important that all guesstimates or creative ideas be founded upon some marketing rationale and a solid understanding of the metrics related to the target market and anticipated financial

Technical Reports

- A formal report designed to convey technical information in a clear and easily accessible format.
- It is divided into sections which allow different readers to access different levels of information.

Technical Reports -Format

Section	Details
Title page	Must include the title of the report. Reports for assessment, where the word length has been specified, will often also require the summary word count and the main text word count
Summary	A summary of the whole report including important features, results and conclusions
Contents	Numbers and lists all section and subsection headings with page numbers
Introduction	States the objectives of the report and comments on the way the topic of the report is to be treated. Leads straight into the report itself. Must not be a copy of the introduction in a lab handout.
The sections which make up the body of the report	Divided into numbered and headed sections. These sections separate the different main ideas in a logical order
Conclusions	A short, logical summing up of the theme(s) developed in the main text
References	Details of published sources of material referred to or quoted in the text (including any lecture notes and URL addresses of any websites used.
Bibliography	Other published sources of material, including websites, not referred to in the text but useful for background or further reading.
Acknowledgements	List of people who helped you research or prepare the report, including your proofreaders
Appendices (if appropriate)	Any further material which is essential for full understanding of your report (e.g. large scale diagrams, computer code, raw data, specifications) but not required by a casual reader

Clients reports

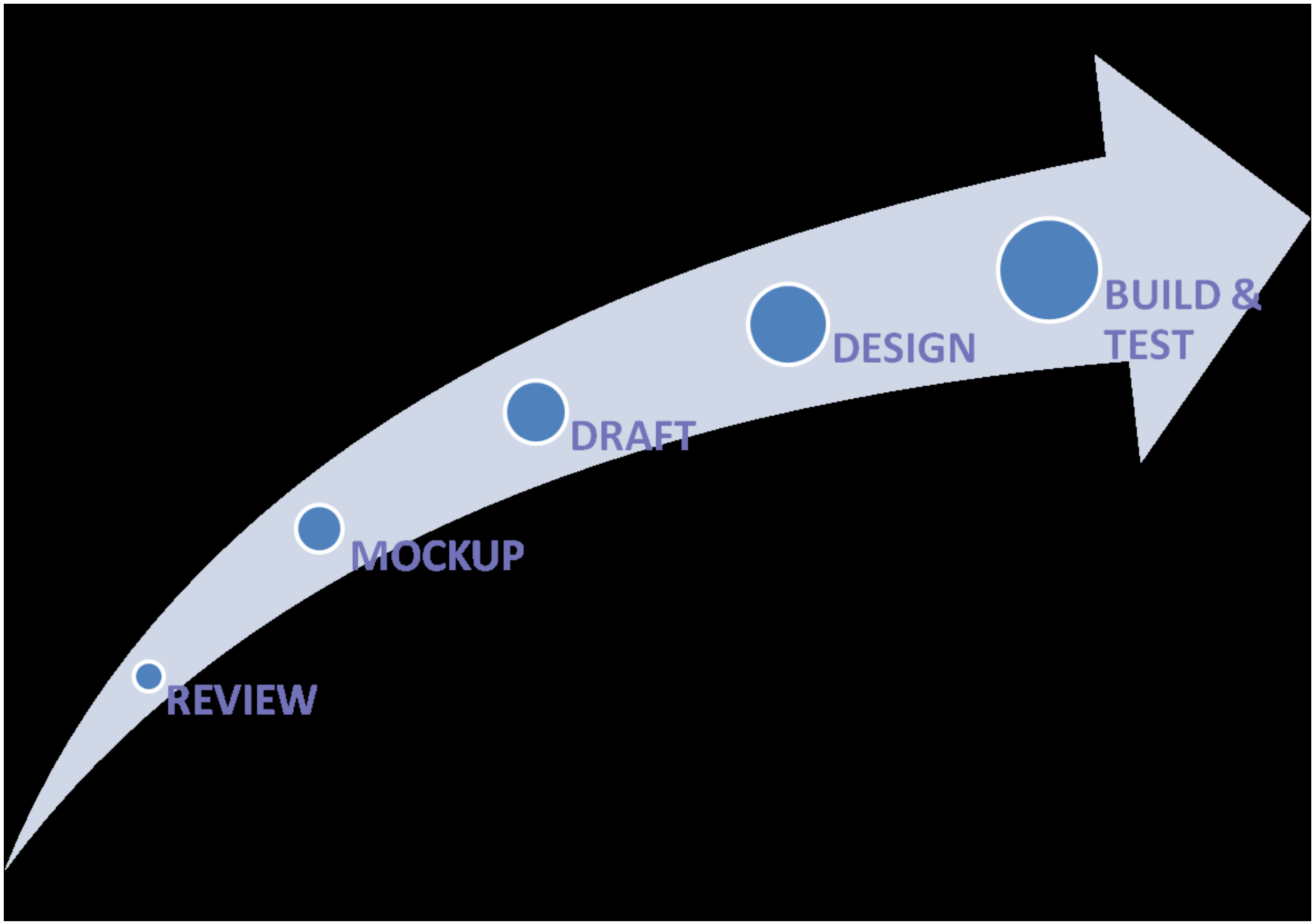
- Reports that are designed for a client
- Are designed
  - As per the client template
  - In line with periodicity defined by the client
  - After double checking that all items to be included in the report have been included
- Represent the services of the organization you work for
  - utmost care needs to be taken to ensure that they come out correctly

Ways to improve your client reporting strategy

Using Interactive Dashboards as a reporting tool

- Author it once, use it every time.
- Ditch the long reports, and make your point clear with just a single screen.
- Empower clients to ask and answer their own questions.
- Give clients access to their data anywhere, anytime.
- Gain credibility by communicating your insights clearly

Steps in creating Client Reports



Minutes of the Meeting (MOM)

- A tangible record of the meeting for its participants and a source of information for members who were unable to attend
- Can act as a reference point
  - when a meeting's outcomes impact other collaborative activities or projects within the organization
  - minutes can serve to notify (or remind) individuals of tasks assigned to them and/or timelines
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Uses of MOM

- Capture the essence of the meeting such as
  - Decisions made (motions made, votes, etc.)
  - next steps planned
  - identification and tracking of action items

Important Tips for MOM

Tips from International Association of Administrative Professionals (IAAP) on taking Minutes of Meeting

- *Be objective.*
- *Write in the same tense throughout*
- *Avoid using people's names except for motions or seconds. This is a business document, not about who said what.*
- *Avoid inflammatory or personal observations. The fewer adjectives or adverbs you use, the better.*
- *If you need to refer to other documents, attach them in an appendix or indicate where they may be found. Don't rewrite their intent or try to summarize them.*

Format of MOM

MINUTES OF MEETING Meeting - 1.

Date : Venue :

Attendees: Minutes Taken By :

Issues	By	Discussion & Decision	Responsible	Deadline

Signature of Attendees:____