Sample Document using eaDocX Corporate Edition Features

This document shows how features of eaDocX Corporate Edition can be used to add additional information to Word documents that are generated from EA.

Document title	Sample #3
Document file name	Sample 3 - eaDocX Corporate Edition - Annotated.docx

Version	Changes	Date
0.0.1	Initial version	1/1/2012
0.0.2	Added example Matrix report and Element report	3/1/2012
0.1.0	First draft circulated	14/1/2012
0.2.0	Second Draft, after comments received	21/1/2012
1.0.0	First published version	1/2/2012

1.1.1 Related Documents

These are the documents which are referenced by this document.

Document	Current Version	Referenced version	Document Owner
Project Initiation Document	1.0.0	1.0.0	Marc LeClerc

Comment [I1]: This is the only part of the document with manually-added text. Everything else in the document will be updated each time the document is re-generated.

Comment [I2]: This document history information is all now stored in EA, as EA elements.
As new versions are created, their details are also stored in EA - the actual Word documents are still kept externally.

This makes it much simpler to keep track of which documents have been produced from this model, and what versions they are at.

Hyperlinks lead to the actual Word documents of the different versions, as saved on a shared drive, cloud storage or SharePoint

Comment [I3]: These are the documents which are related to this one, and their current and referenced versions. If the documents are also in this EA model, then the Current Version will be updated as those documents are re-generated and their versions are changed.

Project Objectives	1.1.3	1.1.0	Marc LeClerc
GetLost Ltd Project Management Standards	4.5	4.5	Unknown
GetLost Ltd Business Analysis Standards	2.3	2.0	Unknown

> **Comment [I4]:** Conditional formatting can be applied to this table, just like any other eaDocX table. Here, we have added a rule which, when the Document Owner is blank, colours it red, and writes 'Unknown'.

1.2 Document Approvals

> **Comment [I5]:** Finally for the Document Versioning functions of eaDocX Corporate Edition, the various roles within the project may also be kept in EA.
>
> The people referenced here are the same ones who own requirements and issues, so we can produce personalised documents (see Sample 4 - Personalised document)
>
> The choice of the names of roles is flexible. There are a default set provided, but you can choose your own to suit your local document management approach.

Role	Person/Department	Approved Version	Approved Date
Document Owner	Jilly Smart - Product Manager		
Document Approver	Martin Jones - CEO	1.0.0	12/2/2012
Document Approver	Marc Leclerc - Programme Manager	1.0.0	13/2/2012
Document Approver	Jilly Smart - Product Manager		
Document Reviewer	Beth Robinson - Ops Manager		
Document Reviewer	Mark Ellsworth - CMO		

1 Document Body

> **Comment [I6]:** The rest of the document shows how eaDocX Corporate Edition can be used to integrate eaDocX and Microsoft Excel data, as well as data from other sources.
>
> The example shows what a project weekly report might look like, using these features.

1.1 Weekly issues - summary
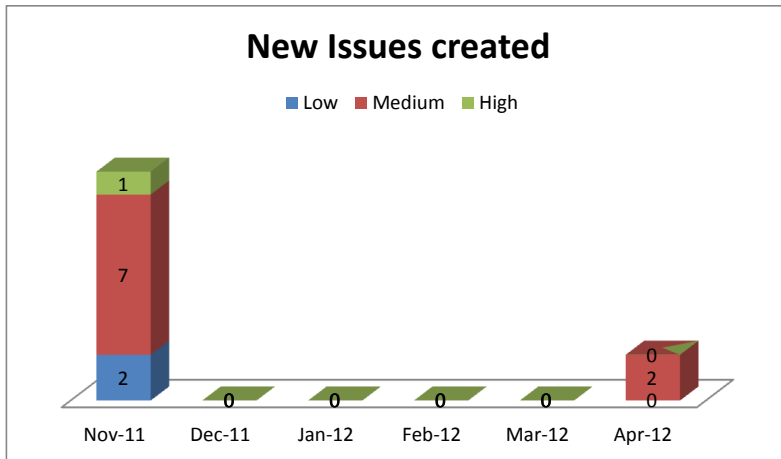
This is a summary of the issues created each week, since the start of the project.

1.2 Finance Summary

Project Spend Report

Date	21/05/2012
Project	32093
Project Name	GetLost Phase 1
Budget Owner	Clare Smart

Cost Center		Budget 2012/13 GBP	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Year to date
34	Staff Direct costs	197,000	12,457	12,457	14,324	17,851	19,678	76,767
23	Premises re-charge	23,000	3,400	3,400	3,400	3,400	3,400	17,000
19	Hardware	250,000	0	0	0	34,561	0	34,561
35	Software - listed	40,000	0	0	0	2,000	0	2,000
12	Software - unlisted	5,000	0	0	0	0	0	0
9	Consultancy - Listed	50,000	0	0	0	25,000	0	25,000
10	Consultancy - Unlisted	10,000	0	0	0	0	0	0

Comment [I8]: This is a different spreadsheet also pulled-in to eaDocX from Excel.
In this case, the data has been pulled from an external system, using Macros which we have written in Excel, which run a query against an external database.
Each time this document is re-generated, the macro is re-run, and new data pulled into Excel.
This data is then pulled into the eaDocX document.

In this example, the financial data does not get put into EA.

Also, as the data is quite wide, the document has been configured to print it Landscape, not Portrait.

1.3   RFI Responses from (supplier X)

These are the comments returned by (supplierX) in response to our Request For Information for the project.

Requirement	Detail	Compliance	(supplier x) comments	Estimated cost (GPB)
RQ-023	Supply of test system	Compliant	Only available in EU & USA/Canada	120,000
RQ-123	Supply of test staff	Compliant	See attached rate card	
RQ-456	Support (business hours only)	Compliant	Assumed only during **local** business hours	GBP 85 per hour
RQ-789	Backup site provision for hot-standby for 99.999% reliability	Non-compliant	Only available for 99.97% availability	
Etc…				