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| Team 2 |
| Document Management Process |
| Project Name |

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| Carla Machado  23-02-2013 |

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| --- | --- | --- | --- |
| **Authors and Contributors** | | | |
| **Date** | **Name** | **Contacts** | **Contribution** |
| 23-02-2013 | Carla Machado | a21170460@alunos.isec.pt | Author |
| 23-02-2013 | Mário Oliveira | a21170292@alunos.isec.pt | Author |
| 28-02-2013 | Filipe Brandão |  | Contributor |
|  |  |  |  |
|  |  |  |  |

Table 1: List of Contribuitors

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Revision History** | | | | | |
| **Date** | **Description** | **Author** | **Version** | **Approvers** | **State** |
| 23-02-2013 | Creation of first draft | Carla Machado & Mário Oliveira | 0.1 |  | Draft |
| 27-02-2013 | Update of the process. Introduction of a new Sate | Carla Machado & Mário Oliveira | 0.2 |  | Ready to Revision |
| 28-02-2013 | Documento Review | Filipe Brandão | 0.2 |  | Ready to Revision |
| 28-02-2013 | Changes as result of the review | Carla Machado & Mário Oliveira | 0.3 |  | Draft |
|  |  |  |  |  |  |

Table 2: Version history

# Purpose

The objective of this document is the definition of the document management process which purpose is to assure that all documents are available to all team members and also all stakeholders. Furthermore it assures that the latest versions are approved and accessible and that all changes are controlled and registered.

# Inputs and Outputs

In this chapter the inputs and the outputs of the document management process will be described.

# Inputs

The inputs of this process will be the necessity of creating a new document or updating an existing one.

# Outputs

The output of the process will be a baselined document.

# Activities

In this chapter the activities associated with this process will be described.

The main activities associated with this process will be the creation of new documents and the update of existing documents.

# Creating a new Document

To create new documents follow the following steps

* **New Document,** the team member that creates the document is the document owner and must:
  + create an Office document and edit its proprieties and fill 
    - Author
    - Title
    - State with the value Draft
    - Company
    - Comments with V0.1
  + Fill the tables Authors and Contributors and also the Revision History
  + Add and commit the new document to the SVN repository in the folder Docs.
* **Edit**
  + The document is edited by the collaborators
  + Each collaborator adds its name to the Authors and Contributors and to the Revision History table
  + Each collaborator does the commit of the changes that were made.
* **If document is edited**
  + Update the Revision History table changing the state to “Ready to Revision” with respective comment.
  + Update the document properties changing the State to “Ready to Revision”.
  + Update the field Comments of the document proprieties to V0.X+1.
  + Commits the current state comment to the SVN folder.
  + Update Measures
* **Revision**
  + The revision of a document is made by a single person.
    - In order to choose the reviser take into account the following hierarchy choosing the first valid person
      * Librarian Manager
      * Quality Manager
      * Project Manager
      * Technical Manager
      * Other
    - In order for a reviser to be valid he can´t be the Owner, Author or collaborator that edited the document.
  + The reviser must add a comment to the Revision History table.
  + The reviser must make use of the track changes tool of Microsoft
  + The revision doesn’t lead to updating the version number
* **If document is reviewed**
  + The reviser must notify the document owner
  + The owner and authors must view the results of the revision and taking them into to account edit the document.
  + If the document is altered following the revision the authors must update the field Comments of the document proprieties to V0.X+1.
  + The state must be updated to Draft
* **If document is ready to approve,** the owner must:
  + Notify the team for document approval. The method used to get the approval can be by speaking with the approvers or using the Facebook group.
* **Approve**
  + For the document to be approved it must be approved by, at least, two people.
    - In order to choose the approver take into to account the following hierarchy choosing the first two valid approvers
      * Quality Manager
      * Project Manager
      * Technical Manager
      * Librarian Manager
      * Other
    - In order for an approver to be valid he can´t be the Owner, Author or document Reviser.
  + Each approver must add a comment to the Revision History table.
* **If document is approved,** the owner must:
  + Update the Revision History table changing the document Version to 1.0 and the Sate to Baselined and also adding a baselined comment.
  + Update the document proprieties changing the State to Baselined
  + Update the field Comments of the document proprieties to V1.0
  + Update Measures
  + Commits the baselined comment to the SVN folder

# Updating a Document

The updating of a document can be originated to update the content of the document or to make the document obsolete, change the state to Deprecated. The steps “**If document is approved”** and **“If document is deprecated”** are alternate paths for the activity.

In order to update an existing document the following steps must be executed:

* **Change Request ,** the team member that is requesting the document update must:
  + Get the approval of, at least, two people. The method used to get the approval can be by speaking with the approvers or using the Facebook group
    - In order to choose the approver take into to account the following hierarchy choosing the first two valid approvers
      * Document Owner
      * Quality Manager
      * Project Manager
      * Technical Manager
      * Librarian Manager
      * Other
    - In order for an approver to be valid he can´t be the team member proposing the document update
* **If Change Request is approved**
  + The document owner must update the document proprieties changing the State and the field Comments to VX.1. Furthermore a new entry in the Revision History changing the document version and state must be added.
  + The team member that proposes the change and the approvers each must add a new entry to the Revision History with a comment. If necessary they must also add their names to the Authors and Contributors table
* **Edit**
  + If the updating request is to turn the document deprecated, execute the step “**If document is deprecated**”
  + The document is edited by the collaborators
  + Each collaborator adds its name to the Authors and Contributors and the adds to the Revision History table
  + Each collaborator commits the changes that he made
* **If document is edited**
  + Update the Revision History table changing the state to “Ready to Revision” with respective comment.
  + Update the document properties changing the State to “Ready to Revision”.
  + Update the field Comments of the document proprieties to VX.Y+1.
  + Commits the current state comment to the SVN folder.
  + Update Measures.
* **Revision**
  + For the document to be reviewed it must be reviewed by a person.
    - In order to choose the reviser take into account the following hierarchy choosing the first valid person
      * Librarian Manager
      * Quality Manager
      * Project Manager
      * Technical Manager
      * Other
    - In order for a reviser to be valid he can´t be the team member that originated the document update.
  + The reviser must add a comment to the Revision History table.
  + The reviser must make use of the track changes tool of Microsoft
  + The revision doesn’t lead to updating the version number
* **If document is reviewed**
  + The reviser must notify the document owner
  + The owner and authors must view the results of the revision and taking them into to account edit the document.
  + If the document is altered following the revision the authors must update the field Comments of the document proprieties to VX.Y+1.
  + The state must be updated to Draft
* **If document is ready to approve,** the owner must:
  + Notify the team for document approval. The method used to get the approval can be by speaking with the approvers or using the Facebook group.
* **Approve**
  + For the document to be approved it must be approved by, at least, two people.
    - In order to choose the approver take into to account the following hierarchy choosing the first two valid approvers
      * Document Owner
      * Quality Manager
      * Project Manager
      * Technical Manager
      * Librarian Manager
      * Other
    - In order for an approver to be valid he can´t be the reviser or team member that originated the document update
  + Each approver must add a comment to the Revision History table
* **If document is approved,** the owner must:
  + Update the Revision History table changing the document Version to X+1.0 and the Sate to Baselined and also adding a baselined comment.
  + Update the document proprieties changing the State to Baselined
  + Update the field Comments of the document proprieties to VX.Y+1.
  + Update Measures
  + Commits the document to the SVN folder
* **If document is deprecated,** the owner must:
  + Update the Revision History table changing the Sate to Deprecated and also adding a comment.
  + Update the document proprieties changing the State to Deprecated
  + Update Measures
  + Commits the document to the SVN folder

# Tools

The documents will be created using Microsoft Office and saved in the Docs file in the team SVN repository.

Facebook will also be used for logging comments.

# Related Processes

There are none existing related processes.

# Measures

The measures to take into account as far as documents are:

* The number of baselined documents
* The number of draft documents
* The number of document waiting to be reviewed
* The number of deprecated documents
* The global change rate (Number of changes / number of baselined documents)

These measures are identified in “Documents Measures” in SVN folder.