Homebuilding Project

Document Management Plan

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**Revision History**

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| Revision History | | | |
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# Introduction

## Purpose

The purpose of the Document Management Plan is to capture how documents will be managed throughout the Homebuilding Project life cycle. Documents refer to all project documentation and artifacts stored on paper or in electronic format.

This plan also contains a brief description on how to convert hardcopy document into digital format for permanent storage.

## Scope

Document management protects a project from losing track of its documents or losing the document itself. Document management achieves the following objectives:

* Provide safe storage of all documents in a project library.
* Provide clarity regarding which version of a document and/or deliverable is the latest version.
* Provide a record of approved deliverables over the life of the project.
* Provide measures to maintain restricted access to confidential documents.
* Provide an accurate and complete archive of project documents to the organization at the end of the project.

For purposes of this plan a “document” is any electronic or hardcopy media designed to convey information about or on behalf of a project, including but not limited to books, deliverables, drawings, electronic mail, faxes, letters, memorandum, organizational charts, pictures, presentations, project binders, reports, specifications, and spreadsheets.

## References

### Best Practices Website

For guidance on the OSI Document Management Plan, refer to the [OSI Best Practices Website](http://www.bestpractices.cahwnet.gov/) (BPWeb): <http://www.bestpractices.osi.ca.gov>

### Writing Style Guide

For guidance on writing styles, refer to the OSI Writing Style Guidelines document:<http://osiintranet.osi.ca.gov/Standards/admin/writing_style_guidelines.pdf>

### Project Centralized Document Repository

Project’s document repository will be residing in a protected folder on the Google Drive that allows access to authorized entities only.

## Document Maintenance

Each document will be updated as needed. Additionally, each document will have a change log pointing to the history of changes.

# Participants Roles and Responsibilities

This section outlines roles and responsibilities for those involved in the Homebuilding Project document management process.

A full list of roles and responsibilities are contained in the Homebuilding ProjectStaff Management Plan.

### Project Director

The Homebuilding Project Director is responsible for ensuring deliverables are archived as defined in the Project Charter and are available for access.

### Project Manager

The Homebuilding Project Manager is responsible for ensuring compliance with the project’s document management plan.

### Project Librarian

The Homebuilding Project Librarian is responsible to ensure project documents are stored correctly in the project library. For the Homebuilding Project, the project manager will assume the role of the project librarian.

### Homebuilding Project Team

The Homebuilding Project Team uses Google Drive for document management. All project staff members, are responsible for creating and storing documents in the on the Google Drive, and for completing the profile information for each document.

### Google Drive Administrator

The Homebuilding Google Drive Administrator is responsible for maintaining the Google Drive account. The administrator acts as a resource for project staff and stakeholders regarding the document storage and access. Project manager of the Homebuilding Project will assume the role of the Google Drive administrator.

# Types of Project Documents

The following identifies the types of documents created, received, and used by the project.

Table 1 -Types of Project Documents

| Type | Description |
| --- | --- |
| Administrative Documentation | * Documents pertaining to the administrative operations of the project, including documents for funding, personnel, staffing, equipment licenses and warranties, etc. |
| Analyses and Recommendations | * Documents describing a specific problem or scenario and the anticipated impact and/or recommended course(s) of action (e.g., risks, issues, etc.). |
| Contract Management Documentation | * Documents associated with the solicitation, administration, and management of the contractor’s supporting the project (e.g., contract deliverables, bidder’s library documentation, work authorizations, etc.). |
| Correspondence and Communications | * Documents sent to or received from any organization external to the project, including the project sponsor, control agencies, federal stakeholders, counties, advocates, and the public. |
| E-mail | * Only critical e-mail is retained, such as important information received from contractors or other outside sources. Project staff should not use email for formal communication or decision making on the project. Critical e-mail is saved and imported into Google Drive. Non-critical e-mail is purged at the user’s discretion. |
| Plans and Processes | * Documents describing the purpose and approach to the project, including the plans and processes that describe how the project will be executed and managed (e.g., Project Management Plan, Scope Management Plan, Change Requests, etc.). |
| Presentations | * Documents used in training or briefing project staff, county staff or stakeholders. |
| Reference Materials | * Documents generated by an external organization that provide insight, guidance, or examples of pertinent information such as legislation, policy, regulations, handbooks, standards, etc. |
| Status Documentation | * Documents describing the current status of planned and actual activities for the project, including funding, contract, schedule, issue and risk status, and meeting minutes describing decisions, action items and concerns. |
| Working Papers | * Early drafts, notes, or reference materials used to create another document. At the author’s or project management’s discretion, working papers may or may not be retained. |

# Document Storage

Homebuilding Project will be using electronic data storage only. Any paper-based documents will be converted to digital format and stored electronically.

### Hardcopy Conversion Process

Each hard copy will be scanned using common office scanner in the office format, named with the descriptive name, and stored in the appropriate place in the Google Drive folder structure.

## Google Drive Electronic Library

Google Drive is a commercial product that for a small fee allows for efficient document storage, document versioning, and electronic document distribution. Google drive can be accessed either through the web interface or through the desktop client installed on the workstations.

The organization of the Google Drive project will be consisting of the subdirectory structure with the top-level folder reflecting the phase of the project life cycle, further delineated by the document/deliverable type.

### Electronic Library Structure

Separate Google Drive account will be created to handle Homebuilding Project only. Thus, there will be no conflicts with other project(s). Google drive is automatically indexed and allows for very efficient and quick searching.

Only those who will need direct access to electronic versions of the documents will be granted read or write access – based on the need.

### Google Drive Profiles

Google drive allows sharing document libraries and folders between distributed electronic systems via individual google drive accounts in a form of a shared folder, or allows for sending direct links to specific documents with the ability to enable remote collaboration without having direct Google Drive access.

### Document Naming Conventions

Homebuilding Project will be enforcing document naming conventions as described below:

* Names must be unique
* All status reports must include the period for the report including the year
* Correspondence should indicate the primary recipient’s organization

## Development and Storage Tools

The Homebuilding Project uses the following standard tools to develop documents, spreadsheets, e-mail, web content, databases, etc.

Table 2 - Documentation Development and Storage Tools

|  |  |  |
| --- | --- | --- |
| Document Type | Development Tool | Storage Tool/Location |
| Document | MS Word 2013 | Google Drive |
| Spreadsheet | MS Excel 2013 | Google Drive |
| Presentation | MS PowerPoint 2013 | Google Drive |
| E-mail | Google Mail | Google Drive |

# Document Control

## Library Control

The Homebuilding Project Librarian has the primary responsibility for managing and controlling the project hardcopy and Google Drive library content. The Librarian performs periodic reviews of the Google Drive repository to monitor document naming conventions and version control.

## Document Version Control

Google Drive automatically versions all the documents and allow to store unlimited number of versions. The only restriction is the size of the storage space allotted for the project. However, additional storage space can be acquired real time with minimal to no interruptions of the normal work operations.

### Creating New Versions

New versions are created automatically to track all changes made to the document. Major releases can be labeled for the ease of storage and searching*.*

# Document Review, Approval and Update Process

If a document requires a review, it should be performed prior to release. In addition, project plans and the charter are reviewed annually using the review processes below to ensure they are correct and reflect the current goals and direction of the organization.

## Review and Approval Process

Due to the size and the scope of the Homebuilding project, all of the primary documents will be reviewed and approved by:

1. Project Manager
2. Project Owner

After the review is over and both, Project Manager and the Product Owner approved the document, the approved document can be released. The review and sign of employs usage of electronic signatures. Presence of electronic signatures on the document signify the approval of the document.

## Internal Quality Review Process

Documents should follow the OSI Writing Style Guidelines and are subjected to an internal quality review prior to their release. The author may request an internal review from another project member. The reviewer should be a team member who was present at the meeting, or who has knowledge of the current status of the initiative, if possible. The reviewer checks the content and conclusions, and performs a basic quality check including format, spell check, and grammar check.

# Document Retention and Purging

## Backups

Google Drive is set up so any deleted document can be recovered eliminating the need of the redundant storage. Google Drive, by its nature, is a distributed storage environment that automatically saves redundant copies of the document in geographically different areas to assure that documents can be retrieved or restored at any time.

## Retention and Archiving

Due to the size and the nature of a project encompassing construction of a single-family dwelling, all the records will be delivered to the project owner and thereafter become the property of the project owner. As such, the project owner has final responsibility of assuring proper document storage and if needed – disposal.

All hard copies that are transferred to the electronic storage media, a.k.a. Google Drive, are destroyed upon successful transfer is complete.

## Purging

All the documents pertaining to the project are saved in the Google Drive and therefore are never truly purged. However, upon the completion, the ownership of the Google Drive account will be transferred to the project owner that will have full access to the whole library upon the project completing. Therefore, the final decision on saving or purging complete project library will be made by the project owner after the project completion.