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Project Diary/Filing System

<Interactive multimedia design projects of any size or scope are usually very complex, and therefore demand the coordination of many different types of people working together. Record keeping is an essential task of the project manager. It is a sound strategy to maintain a "Project Diary" throughout a multimedia design effort. This document outlines the major components of a "Project Diary," and provides a rationale for the inclusion of the various sections.

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Preface

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1.0 Contents of a Project Diary

<A "Project Diary/Filing System" should contain the following sections:

- *Planning records, for example*
 - a copy of the proposal for the project if one was written*
 - a copy of the project contractual agreement if one exists*
 - a time line or PERT chart for the project*
 - copies of vendor contracts for subcontracted work*
 - a project team organisational chart or roster*
- *Progress records*
 - copies of development activity logs from project team members*
- *Correspondence file*
 - copies of correspondence related to the project*
- *Financial records*
 - a project budget*
 - receipts for expenses and copies of invoices related to the project*
- *Customer deliverables*
 - copies of the project status reports issued weekly or at other intervals*
 - copies of sign-off forms used to obtain client sign-off on major milestones*
- *Technical reports*
- *Quality Assurance records*
 - Standards*
 - Change Control*
 - Evaluation*
 - Testing*
- *Copies of any other documents related to the personnel, budget, or schedule of the project.>*

2.0 Storage of project documents

<The Project Diary should be maintained in either a filing cabinet with folders appropriately labelled or in a three ring binder. This will depend on the size and complexity of the project.>

3.0 Project diary overview

3.1 Planning records

3.1.1 Project proposal

<The funding for most interactive multimedia projects is obtained when companies compete via a Request for Proposals (RFP) process. Suppose a corporation wants to have an interactive multimedia (IMM) information system developed for use by its employees to help them better understand the options they have for retirement plans, health benefits, etc. The corporation could ask its own internal Human Resources Development (HRD) department to develop the interactive information system, but because the HRD department has never produced such a program before, the corporation decides to release an RFP in search of a contractor to develop a prototype IMM system. Several multimedia development companies compete for the contract by writing proposals. In the best of circumstances, the winning proposal is selected because it represents the best balance of quality, originality, and cost-effectiveness. A copy of the proposal should definitely be part of any Project Diary.>

3.1.2 Project contract

<Usually, after winning a RFP competition, a formal contract is written that describes the “deliverables” for a project such as a CD-ROM with the prototype IMM system pressed on it, installation instructions and maintenance guidelines. The contract may also include the budget and time line for the project including any interim deliverables (e.g., a script), major milestones, payment schedule, and so forth. Obviously, such a contract is an important part of a Project Diary.>

3.1.3 Schedules

<In addition to any schedules or time lines included in the project contract, the project manager may also develop internal time lines or charts to help keep track of the schedule of the project and major accomplishments. Project management software such as MacProject II or Microsoft Project can be very useful in this area. These programs can be used to develop PERT charts that help plan, track, and manage the progress of a project.>

3.1.4 Vendor contracts

<It is rare that a project team will have every type of expertise and experience needed to construct an interactive multimedia project, and so often times it is necessary to contract others (called vendors) for special services such as video editing. Also, even if you do have the internal expertise, it is sometimes less expensive to contract out certain aspects of a large scale development project. Copies of vendor contracts for subcontracted work are important elements of a Project Diary.>

3.1.5 Organisational chart

<An organisational chart or roster describing the team members assembled for the project and indicating their inter-relationships may be useful, especially in large scale projects in which personnel may not know the roles and responsibilities assigned to others. Whatever kind of chart or roster is used, a copy should be in the Project Diary.>

3.2 Progress records

3.2.1 Development activity logs

<Development activity logs should be maintained by all project team members and tabulated by the project evaluator or manager. Time data will be invaluable in accounting for the resources used in completing this project. It may be even more useful in planning for the next project. Copies of this data should be included in the Project Diary.>

3.3 Correspondence file

3.3.1 Correspondence

<It is a good practice to keep copies of any correspondence (e.g., letters or internal memos) related to the project in the Project Diary.>

3.4 Financial records

3.4.1 Financial tracking

<In addition to the budgetary information in the project contract, a manager will usually maintain spreadsheets that help plan, track, and manage the financial resources of a development project. Spreadsheet programs are available in integrated software packages such as ClarisWorks, or a specific spreadsheet program such as Microsoft Excel may be used. Copies of financial spreadsheets should be kept in the Project Diary.>

3.4.2 Receipts and expenditure

<Copies of receipts for expenses and invoices for services should be maintained in the Project Diary.>

3.5 Customer deliverables

3.5.1 Project status reports

<Project status reports should be issued at weekly intervals or on the occasion of the completion of some major milestone. Copies of your status report should be maintained in the Project Diary. >

3.5.2 Client sign-off forms

<Obtaining client sign-off on major milestones of a project is an important function of the manager. Copies of sign-off forms should be kept in the Project Diary.>

3.6 Technical reports

<These reports may take a number of forms, e.g. they may relate specifically to a segment of code, to video/graphic/animation compression issues or to issues relating to the client's requirements and the delivery platform.>

3.7 Quality assurance records

3.7.1 Standards

<Standards are written agreements which contain technical specifications or other precise criteria to be used consistently as rules, guidelines or definitions of characteristics to ensure that materials, products and processes will consistently do the job for which they are intended. Standards may include:

- Dimensional standards that define the size, shape, volume, frequency etc of an entity, e.g. all graphics will be 320x240 pixels and 16 bit colour, uncompressed.*
- Standards for quality and purpose, e.g., defining the level of performance to be expected*
- Standards which define test methods*
- Standards which establish codes of practice, which define how things should be done, to ensure safety, reliability and conformity.>*

3.7.2 Change Control

<Copies of all change request forms should be filed in order to ensure that product changes requested by the client or deemed necessary by the developer are agreed. Procedures for 'signing off' on changes should be communicated to the client at the outset of the project.>

3.7.3 Evaluation

<Records may include the initial analysis and formative and summative evaluation undertaken during the design, production and implementation phases.>

3.7.4 Testing

<Documentation arising out of testing activities should be filed and cross-referenced with the appropriate Plans, e.g. the Quality and Test Plans.>

3.8 Any other documents

<Copies of any other documents related to the personnel, budget, or schedule of the project should be included in the Project Diary.>