

Stage: Delivery Report

Improving Information Management in Project
Services

P0333

Document Version: 1.0

Date: 22/08/19

Table of Contents

[1 DOCUMENT MANAGEMENT](#)

[1.1 Stakeholders](#)

[1.2 Version Control](#)

[2 INTRODUCTION.](#)

[3 DELIVERY REPORT](#)

[3.1 SharePoint](#)

[3.2 Guidance Template](#)

[4 COURSE OF ACTION](#)

1 Document Management

1.1 Stakeholders

Project Role	Name	Unit
Project Manager	Charlotte Higgins	Project Services
Project Sponsor	Rhian Davies	Information, Technology and Web - CAHSS
Project and Programme Manager Representative	Ben Armstrong	Project Services
Head of Service Management	Alex Carter	IS Applications Service Management
Service User	Bill Lee	Development Services
Service User	Mark Ritchie	Project Services
Portfolio Manager Representative	Muriel Mewissen	Project Services
Service User	Stefan Kaempf	Production Management
PMO Team	Steph Ruthven	Project Services
SharePoint Service Manager	Stephen Smith	Service Management

1.2 Version Control

Date	Version	Author	Section	Amendment
22/08/2019	0.1	Charlotte		Initial Draft

2 Introduction

The purpose of this report is to summarise the work conducted to improve information management within Project Services.

3 Delivery Report

The following outcomes were delivered as part of this project

1. Initial development of a SharePoint site for the storage of procedures and guidance documents for Project Services
2. A template for current and future guidance documents, highlighting the intended audience and version control.

3.1 SharePoint Site

The SharePoint site structure was drafted after a consultation with members of the Project Management Office, which identified the key document types and their required audience. These are shown in *Table 3.1.1*.

Table 3.1.1. Key document types and their required locations, as identified by the Project Management Office.

Comms	Guidance	Procedures	Resource/AST A	MI	PMO	Managers	Sections	Collaborations (SEP/DLAS/EFI)	Other/ Working Documents
Comms sent to Project Services	Agreed guidance	Agreed procedures	Project Services Resource tracker	SLT Project Focus reports	End of year prep & comms	Capacity planning managers	Section meetings		3-Year planning
Comms sent to Apps		WIS notes OUT OF SCOPE	Project Services Resource analysis	Apps SMT project MI	PMO financial management	Recruitment University of Edinburgh			Procedures in development
Comms sent to ISG			Resources documents for project Services resourcing	Project Services project MI	Training information – tracking spend/use with suppliers	Recruitment contract			Guidance in development
			Apps resource analysis	Reports requiring PM update (Apps)	Training service	Job descriptions			PMO work in progress (e.g. Benefits)
									Working docs with SEP

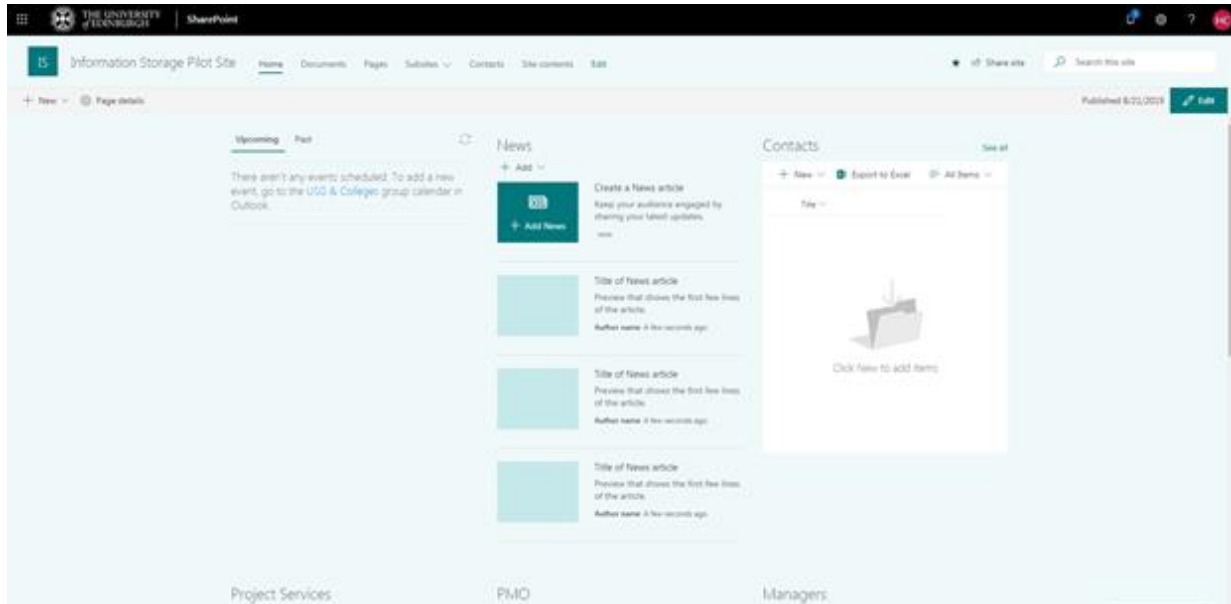
This information was added to that which had already been acquired prior to the start of this project, primarily through interviews with various members of Project Services. The interviews and workshop were brought together to form a proposed structure for the SharePoint site, detailed in *Table 3.1.2*, below.

Table 3.1.2. Proposed structure for the SharePoint site.

*Project Services	PMO	Managers	Applications	PMO external	*ISG PMO
Section meetings	Management information	Recruitment	Agreed procedures	Who we are	Who we are
Shared calendar	Training service	Capacity planning	Management Information supporting Wiki page	What we do	What we do
News	Financial management	Job Descriptions		Services • Training • Project Website	Monthly reporting
Professional development	End-of-Year	Resourcing information			Templates
Resource requests	Resource analysis	On/off boarding checklist			Procedure
Working patterns	On/Off boarding	Induction			
Seating plan	3-yr planning – prep				

The landing page for the SharePoint site contains the following areas, shown in *Figure 3.1.1*:

- A shared calendar, which could contain all the key dates for the department (year-end, monthly reporting, etc.)
- A news channel, for key news items to be shared across the department
- A key contacts list



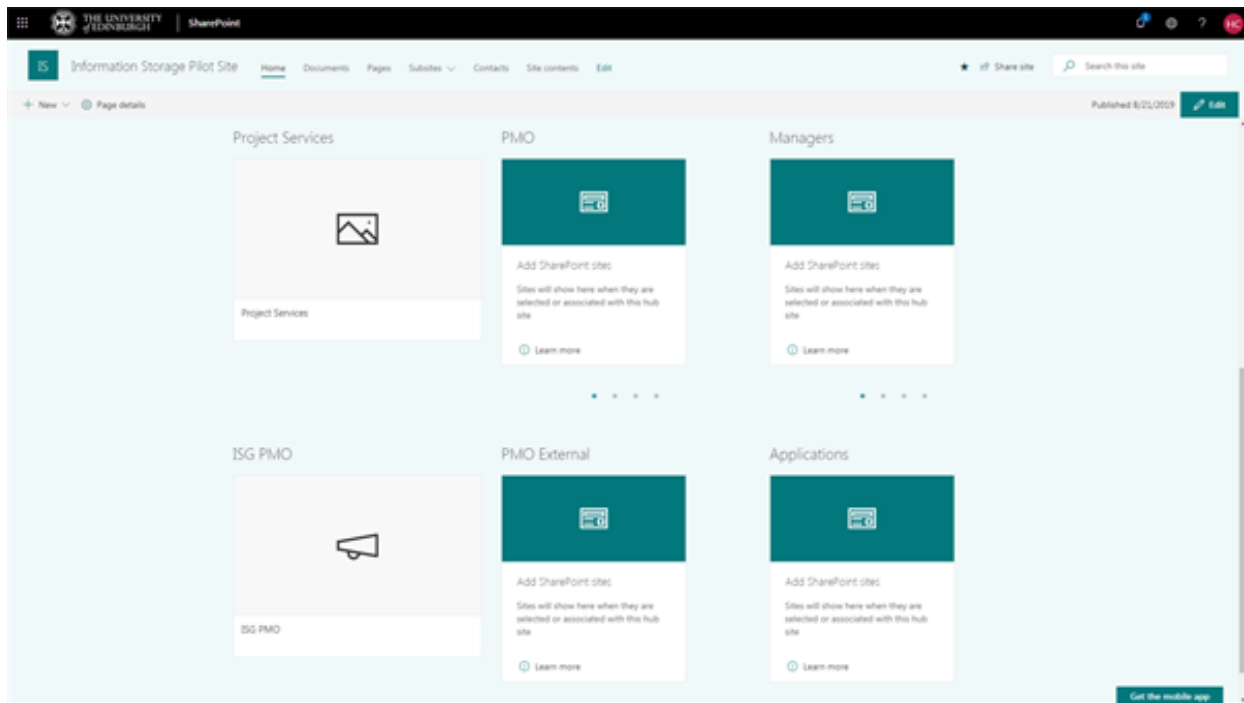


Figure 3.1.2. The landing page of the SharePoint site, showing the six main areas of the site. For this project, only 'Project Services' and ISG PMO' were populated.

Figure 3.1.3 shows the landing page for the 'Project Services' subsite.

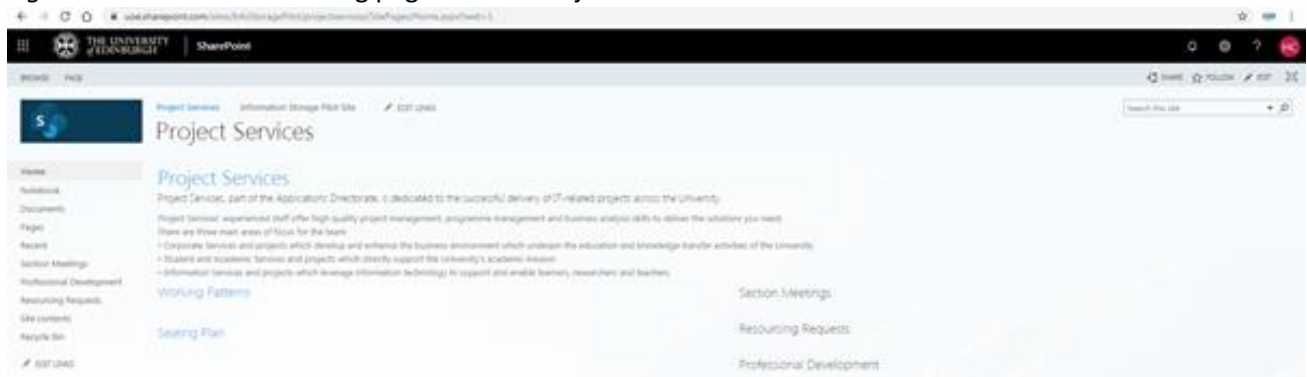


Figure 3.1.3. The landing page of the 'Project Services' subsite. This includes an overview of Project Services, as well as working patterns and a seating plan, and key documents outlined in Table 3.1.2.

Within this area, there are working patterns and a seating plan for those working in the department. These have been taken from the University's Wiki page and so are up to date as of 22/08/2019. Areas for 'section meetings', 'resourcing requests' and 'professional development' have also been set up, but relevant documentation to be included in them has yet to be identified and migrated. A 'shared calendar' (as per Table 3.1.2) could not be located for Project Services and so has not been included. Although a 'news channel' was requested, it is unclear how this would vary from the channel included on the initial landing page, and so has not been included.

The landing page for the 'ISG PMO' subsite is shown in *Figure 3.1.4* below.

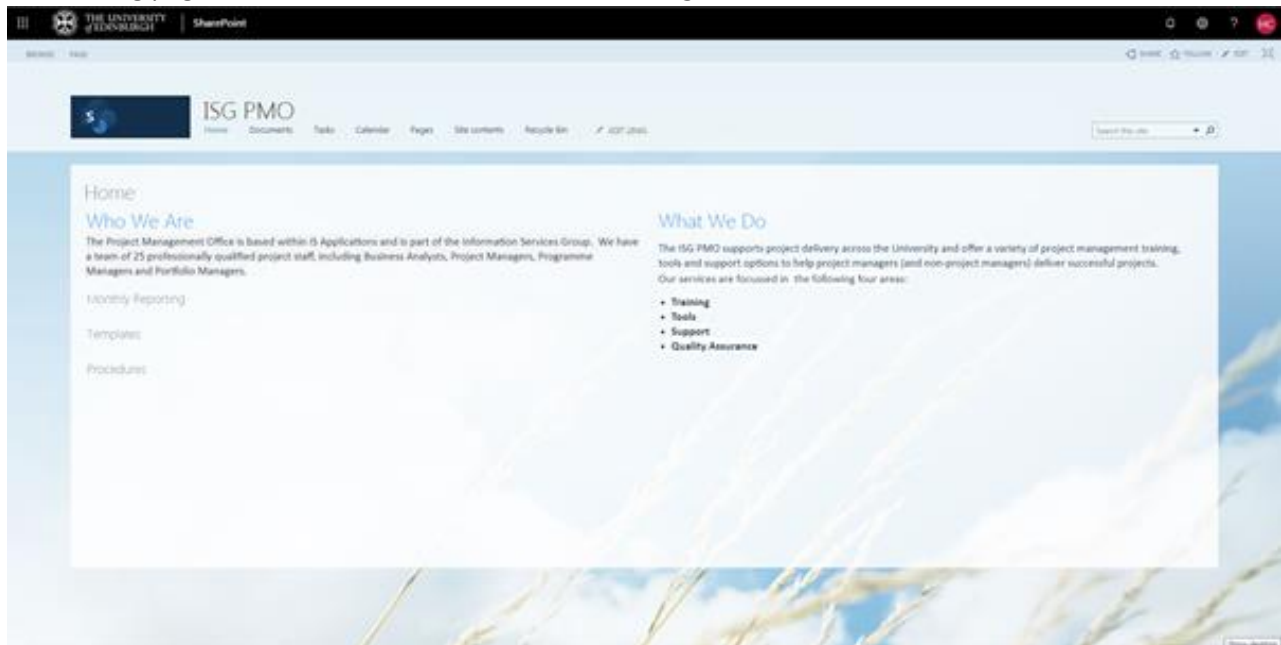


Figure 3.1.4. The landing page of the 'ISG PMO' subsite. This includes an overview of the ISG PMO, as well as the key documents outlined in Table 3.1.2.

This also contains an overview of the ISG PMO, as well as the document repositories outlined in *Table 3.1.2*. Within 'Monthly Reporting', the guidance and procedures located on the Wiki page (<https://www.wiki.ed.ac.uk/display/insite/Governance>) have been migrated across, keeping the key information about each of the documents (description, date raised/updated, author). Although 'Templates' and 'Procedures' areas have also been set up, relevant documentation for migration has yet to be identified.

3.2 Guidance Template

A template for current and future guidance templates has been drafted and is given below in *Figure 3.2.1*.

Page Title

Breadcrumbs

Author

Date Created

Audience and Overview (Contents)

Version Control

Date	Version	Owner

Main content of page, in the same order as the overview.

If external documents are referenced, include a note with an overview, creator and date last edited for the document, eg.

Document Type	Document title	Description	Owner/Creator	Date

If diagrams, figures or infographics are used, ensure clear and consistent labelling and referencing throughout the document.

For more information, please contact:

Figure 3.2.1. A template for current and future guidance documents, highlighting important features which will improve consistency and ease of use.

Although the initial layout can be used for most procedures and guidance document, some amendments will be necessary depending on the nature of the document. Some comments have been included, but the most important features to be included are consistency and ease of use. For all documents, the following information should be clearly visible:

- Document title

- Document's author
- Intended audience
- Version Control (also including dates of review, even if no amendments were made)
- Date created/updated
- Overview of contents of document
- Contact details should the reader require clarification or further information

4 Course of Action

There are several outstanding issues from this project which need to be addressed, as highlighted below:

- Complete an example guidance document using the template produced
- Agree a roll-out plan for full migration of all content to the SharePoint site

The following notes for should be considered as part of any future roll-out plan:

- It will be necessary to conduct a more thorough review of all documentation relating to procedures and guidance within Project Services, so that the location and content of each of these documents are known.
- Many of these documents are in need of updating, and this should be carried out prior to the migration of content to the SharePoint site. A template, such as the one given by this project, should be implemented to ensure consistency and ease of use across all documentation.
- The SharePoint site should be reviewed and extended prior to migration, to ensure that it is still fit for purpose after the review of all documentation. Particular attention should be paid to the audience of each document, for facilitate security and ease of use.
- Regular reviews of all documentation should be carried out, so that all staff can be confident that the information contained within the SharePoint site is current and accurate.