**Best Practices for Project Archivists**

**Weekly Meetings**

- Work with Project Manager and Advisor to institute Progress, Issues, Goals or similar weekly update in team meeting.
- Consider Instituting Goals for This Week, Two Weeks, and Four Weeks.
- Have students mention any decision made the week before in either of these check in exercises.
- Encourage project manager to submit team meeting agendas into the documentation record.
- Encourage project manager to set action items with deadlines for team members.
- Encourage team to share note taking responsibility for the weekly meeting.
- Create a Google Doc to organize team progress: Include what team members are going to do, what decisions were made, progress, constraints, updates and changes to documentation, goals, needs, etc. – Give room for quick one sentence responses with a time stamp for each. This makes it easy to create the project documentation.
  - If you use a Google Doc, make sure to set a process and guidelines for updating the Google Doc - what are the expectations? – Is it due at the end of lab?

**Decision Documentation**

- Check in weekly in some way to track decisions throughout the semester.
- Focus on explaining how decisions are made. Show and explain equations, any decision matrices, or flow charts. Provide factual information that explains how conclusions about decisions were made.

**Tools**

- Organize project timeline and document changes throughout the semester.
- Set up naming conventions and file structures for your team.
  - An example naming convention might be.
- Become familiar with Sharepoint functionalities so that you can coach others on your team.
- Draw flow charts on board to make decisions (take pictures of board and insert into documentation)
- Use Excel to make GANTT charts to demonstrate progress and plan.

**Documentation**

- Lead the team in a discussion and consensus decision on units of measure for the project – standard vs. metric.
- Be specific – use numbers when possible.
- Include pictures in documentation that make design clear.

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• Reference charts, slide shows, photos, and other supplementary information within the documentation so that those items can be tied to how they were created and their purpose.
• Institute peer review of documentation. Have teammates exchange notebooks/blogs and provide comments and edits on each example of documentation.
• If you would like feedback on documentation or advice, contact TA, advisor or Megan Sapp Nelson msn@purdue.edu.

Transition Documentation at End of Semester

• Create design review powerpoint from existing Design Document Template; Include decision matrices and other decision support documents
• Create an end of semester narrative. What was completed? What was not completed? Where should the next semester’s team pick up? Provide context for what was accomplished and what was not accomplished.
Skills Session - April 9, 2014
Discussion on Project documentation / Project manager role

What needs to be addressed - proof reading
Things are done at the last minute

Referencing the charts and other items in the documentation - make them easier to find.

Relationship back to the design process - what was finished what was not finished - context

More detailing about the decisions and the decision process
Showing and explaining the equations - logic behind the decisions

Include pictures of the design - helpful in explaining what was going on

Being specific - using a number when you can

Having the team agree to units of measure - consensus of what will be used (metric vs. standard)

What was done well in the documentation
  • Pictures
  • Agenda for each meeting - give a time limit and assign people to the tasks - note taking - write out what the notes stand for and what the signify - write out possible solutions and how they apply. - easier to dig out the ideas and apply.
  • Sometimes design document is neglected - adding due dates and milestones for weekly meetings
  • Created a google doc form - what you are going to do, what decisions were made, progress, constraints, updates and changes to documentation, goals, needs, etc. - quick one sentence responses, has a time stamp - logs everything - making it easy to create the project documentation
    ○ Process for updating the Google Doc - what are the expectation - dues at the end of lab (but not strict- probably needs to be). Other teams members seem to utilize this a great deal

How well did documentation work for design reviews
  • Worked well - easier to do it this semester because of this
  • Based ppt off the design document
  • Some of the design reviews questioned some of the decisions - material choices on the rocket - incl a design matrix and were able to go back and answer this easily with the documentation
  • Other team did not have something specific to show them w/o project documentation

Including Project matrices
  • Decisions were made in previous semesters

How is the accountability function going - working with team leader to hold others acct for getting doc work done
  • It's not going - project manager was a freshmen - project leader could have done more to help out - he wound up taking on the role.
  • More training or a better explanation of the role.

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• Project manager focused on education when the team wanted the design did research that was not related to the matrix - lots of documentation beyond the design document but may not be helpful - took a lot of time to figure out what they needed to know - they have three parts: decision matrix which problem to solve first - next soil science (project on erosion), (missed the 3rd) - all beyond the design document - documentation is referenced in the design document but they are not using the design document specifically - still feels that it would be useful

What do we need to teach the next project managers?
• File structure and a naming convention (not done haphazardly)
• Organization of materials / documentation - needs a title or other means of distinction
• Org of the design document - what is good and what is bad - define some criteria for formatting - beyond the design document (some advisors don't like the structure)
• Make expectations clear (advisor not us)
• Reading the "how to do the design document" - make it easier to read / engage with - right now it's long and hard to use - it is well laid out but hard to get through (40 page) - summarization and then reference the full document - repackage some how
• Different folders for different years - rather than grouping everything together -
• Google doc template was a good idea - make it easier to fill out the design review
• Sharepoint is frustrating - is a disincentive - can't work collaboratively (copy it over into sharepoint at the end of the semester) - Sharepoint: can only move files one by one (explorer view - you can drag and drop)
  ○ Need to teach sharepoint explorer view(?)
• (Carla) Organizing by semester may be complex - what specific aspects?
  ○ If project doc is well organized it is easy to find -
  ○ Version control - need to check in and check out emphasize this to track
  ○ Keep design aspects together (as a means of organization) rather than temporal aspects
  ○ Tagging files - (need for controlled vocab though)
  • Has folders for a particular type of information
• How to reference something that was done previously - do you add it to the old doc or create a new one?
• A way to decide what is relevant to put in the design doc / documentation
  ○ Can't fit all in - need criteria to make decisions own what to keep vs. what not to.

Tools
• Flow chart (write on board - take pictures or use MS software)
• Making gnatt charts in excel - set up a template depicting what a "nice" chart looks like)
• Template file structure in a couple of different organization - file naming conventions
• Simplifying / summarized design doc that would reference the full chapter
• Emphasis on the decision matrices - often asked for this in the design review - show the criteria behind the decisions

What to teach advisors / TAs
• More guidance and direction
• Show students - only two check point - more frequent feedback / checking in during the semester - more individual feedback
• Clear expectations of formatting, etc. in documentation
• More example of good documentation - as a resource
• Efficient engineering tool menu - what tools will be used for what situations.
• Examples from your own team from previous semesters / teams

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○ Have students ID these examples.