

So Many Documents, So Little Knowledge

Question:

Samohit, I am a fairly experienced project manager of small and medium-sized projects. Now I have been given the chance to manage my first large project! I am comfortable managing documentation on small and medium-sized projects, but I am overwhelmed thinking about all of the documents that will be part of this large project. Can you provide some advanced techniques for managing documents on a large project?

Everett

Answer:

Everett,

First, kudos to you for realizing that the size of the project helps determine the overall documentation complexity. Most project managers do not understand this. Not me, of course – I like to manage every project like it is a large, complicated project, just to put all of my project management knowledge into action. In fact, I pride myself on my ability to turn even the simplest project into one so unwieldy that I have the opportunity to show off all my project management skills!

When you have a very large project, handling all of the documentation that comes along with it can be pretty tricky. Of course, I have some great techniques that will help you out in this area! Here are just a few:

- **Assign a document librarian.** Someone needs to be responsible for keeping track of all the documents – you will just want to be sure it isn't you! The librarian could be anyone on your project, but I recommend appointing someone who wears glasses – they usually make the best librarians.

Now, some people will tell you that the librarian could be just part-time in that role depending on the amount of work involved, but I heartily disagree. I believe that the librarian should be on-call 24/7. In fact, I have been known to call the librarians on my projects at 3:00 AM to inquire about documents. You can never be too careful!

- **Define access rules.** The access rules describe items such as who can review documents and who can update them. Certainly you will want to secure some documents so only certain people can see and update them. After all, if you allow everyone to access all of your project documents, how will your team members know who your favorites are? To secure documents, you will probably want to purchase a padlock or a very large safe, with only the coolest people on your team receiving access. For an added level of security, consider writing these documents in invisible ink or a special code!
- **Determine retention and purging timeframes.** I am a huge proponent of purging documents every so often, like whenever the document safe gets full. I also purge my hard drive when it gets crowded and slows down my ability to watch YouTube. You will want to publicize the purge timeframe so no one is surprised when a document that they need is no longer available.

- **Obtain document management software.** Just kidding. Who has ever heard of software to manage documents? What year do you think this is – 2020?

These are just a few of the many advanced techniques that you can use to manage documents on a large project. I could have included more, but I have just taught you the most important lesson of all – when managing a very large project, keep documents brief, even if it means leaving out some important information!