



**Poseidon House
Castle Park
Cambridge CB3 0RD
United Kingdom**

TELEPHONE:
INTERNATIONAL:
FAX:
E-MAIL:

**Cambridge (01223) 515010
+44 1223 515010
+44 1223 359779
apm@ansa.co.uk**

ANSA Phase III

Document Classification

Rob van der Linden

Abstract

This document will help you choose a category of document, once you have decided (1) what you going to write, and (2) for whom you are going to write it. It includes guidelines on the clasification of presentation slides.

This document (together with APM1022, APM1024 and APM1026) is part of the Quality Plan for Phase III

APM.1024.02

Approved

25th October 1994

Project Management (confidential to ANSA consortium for 2 years)

Distribution:

Supersedes:

Superseded by:

1 Document Classification

1.1 Introduction

This document contains a description of the document categories for Phase III. The non-technical documents will be placed in the following classes:

- Project Management
- Marketing and Contracts

Technical documents will be in one of the following classes:

- Architecture Report
- Technical Report
- Briefing Note
- Standards Contribution
- External Paper
- Request for Comments

For each of the classes above this document attempts to answer the following questions:

1. How are the document classes characterised?
2. What can be expected to be in a document of that class?
3. What is the intended audience for a document in a particular class?

1.1.1 Who should read this document?

This document will help you choose a category of document, once you have decided:

- what you going to write
- for whom you are going to write it.

If you are producing slides for a presentation, the document classification should also be applied.

1.1.2 Other documents

APM1022 Document writing guide gives guidance on planning the writing process and on the style of writing your documents.

APM1023 Project Archive describes what the Phase III project Archive will contain.

APM1026 Document Support Tools sets out the processes and procedures for document handling, describing the automation of these processes.

This and the documents cited above are part of the Quality Plan for Phase III.

1.2 Request for Comment

Characterised by:

Request for Comments (confidential to ANSA consortium for 2 years)

Request for Comment documents remain confidential to the project to which they apply for an agreed period of time. In ANSA Phase 3 this is two years.

1.2.1 What is in it?

- report on work in progress
- may provoke further work
- suggest designs or design alternatives
- comment on ongoing work
- documents reflect views of authors
- combative style allowed
- work in progress presentations to the Technical Committee

1.2.2 For whom is it intended

- project team members
- employees in partner companies who are close to the work in hand

1.3 Technical Report

Characterised by:

Technical Report

Technical Reports are licensable. This may involve a fee and/or a restriction upon the way in which the IPR may be used.

1.3.1 What is in it?

- consolidation of technical results
- description of results and justification
- examples of application and use of results
- relation to architecture
- relation to other technologies
- presentations of completed work for approval by the Technical Committee only (i.e. not for conferences or external workshops)

1.3.2 For whom is it intended?

- team members
- Technical Committee members
- product and system designers in sponsor companies

1.4 Architecture Report

Characterised by:

Architecture Report

Architecture Reports are licensable. This may involve a fee and/or a restriction upon the way in which the IPR may be used.

1.4.1 What is in it?

- documents the architecture
- stable and lasting
- forms the keystone of other work
- motivates, explains and demonstrates use of concepts and rules
- suitable for use in the production of standards contributions
- no slide presentations are allowed in this category

1.4.2 For whom is it intended?

- all those developing the architecture
- all Technical Committee members
- anyone seeking in depth knowledge of the architecture
- all those seeking to build “conforming” systems
- members of standards bodies

1.5 Standards contribution

Characterised by:

Standards Contribution

Approved Standards contributions are “open” documents, that is there are no restrictions on the use of the information contained in them.

1.5.1 What is in it?

- contribution to National Standards body (BSI)

1.5.2 For whom are they intended?

- National standards body members
- Technical Committee members with an interest in standards

1.6 Briefing Notes

Characterised by:

Briefing Note

Approved Briefing Notes are “open” documents, that is there are no restrictions on the use of the information contained in them.

1.6.1 what is in it?

- key results on one page
- motivating material (2 pages)
- briefing, including comparison with and relevance to other technologies, benefits etc. (8 - 12 pages)
- why should your company adopt this idea?
- slides (possibly with speaker notes) intended for an audience which includes those outside the sponsorship should also be BR.

1.6.2 For whom are they intended?

- Management Committee members
- product marketing and development strategists
- the general IT community.

1.7 External Paper

Characterised by:

External Paper

1.7.1 What is in it?

- description of some result of the work
- formatted according to rules of place of publication
- presentations for public conferences and workshops

1.7.2 For whom are they intended?

- journal publication
- conference paper

1.8 Project Management

Characterised by:

Project Management (confidential to ANSA consortium for 2 years)

Project Management documents remain confidential to the project to which they apply for an agreed period of time. In ANSA Phase 3 this is two years.

1.8.1 What is in it?

- everything to do with day to day project management, such as procedures, progress reports, resource reports
- document review material (comments, recommendations for change)
- minutes of TC and MC and associated documents (agendas etc.)

1.8.2 For whom are they intended?

- APM project management

- auditors
- quality control

1.9 Marketing and Contracts

Characterised by:

Marketing and Contracts

Approved Marketing and Contracts documents are “open” documents, that is there are no restrictions on the use of the information contained in them.

1.9.1 What is in it?

- contracts
- five year vision statement
- two year objective statement
- 2 year operational plan
- marketing material (to attract new sponsors)
- presentations to potential sponsors

1.9.2 For whom are they intended?

- existing sponsors
- new sponsors

1.10 Presentations

The following procedures are to be followed when preparing presentations.

Presentations should be targeted in the same way as documents. The audience is the most important group.

Presentations are

- RC documents if it concerns progress reports to the Technical Committee or internal presentations
- TR documents when it concerns the presentation of a final deliverable to the Technical Committee. When approved, these documents remain internal to the sponsorship, until explicitly released by the Chief Architect.
- BN documents when it concerns a briefing of a more general nature, which when approved will be seen by the public.
- EX documents when it concerns presentations to open conferences and workshops (e.g. ANSAworks). Approved presentations are open to public scrutiny.
- PM documents when it concerns project management presentations to the Technical and Management Committees (progress reports etc.).
- MC documents when it concerns presentations to potential sponsors, or general marketing presentations. When approved these will become publicly available.

Before printing a presentation, it must be checked in.

Before a presentation is given it must be approved by the Chief Architect.

Before a presentation is given to an external audience (BN, EX, MC) it must be approved by the Chief Architect AND marked as approved in the document management system, before producing the transparencies.

TR and PM presentations may be approved in the document management system after the presentation: they are then deemed to have been approved by the audience (TC or MC).

1.11 Other projects

Other projects may have their own document classification schemes. In projects in which APM is in the minority this will inevitably occur. Project archives and tools should accommodate this heterogeneity.

1.12 APM company documents

APM company documents are in a separate category from project documents. It is recommended that a new category be started for this, because CO has been used for APM documents, as well as for project management documents in ISA and the run-up to Phase III.

The APM Practices and Procedures document forms a common basis for all work carried out at Poseidon House. As such it applies to all projects carried out there.

1.13 Document Access Matrix

Table 1.1: Phase 3 document access matrix

user	AR	BN	EX	MC	PM	RC	SC	TR
phase 3 worker	DAPArC	DAPArC	DAPArC	DAPArC	DAPArC	DAPArC	DAPArC	DAPArC
phase 3 sponsor ^a	DAP	DAP	DAP	DAP	DAP	DAP	DAP	DAP
phase 3 associate	(sel)	Ap	Ap	Ap		(sel)	Ap	(sel)
projects (e.g TINA)	(sel)	Ap	Ap	Ap		(sel)	Ap	(sel)
public	-	Ap	Ap	Ap	-	-	Ap	-

a. Sponsors can request cancelled and archived documents. Lists are available on request.

Key:

Ap	approved	EX	External Paper
Ar	archived	MC	Marketing and Contracts
D	draft	PM	Project Management
C	cancelled	RC	Request for Comments
(sel)	selected by Chief Architect	SC	Standards Contribution
AR	Architecture Report	TR	Technical Report
BN	Briefing Note		