**PROJECT DOCUMENTATION TEMPLATE**

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| **PROJECT PHASE** | **DOCUMENT NAME** | **DOCUMENTATION DESCRIPTION** | **OWNER** | **VERSION** | **DATE COMPLETED** |
| Pre-Initiation | Business Case | Details the business needs and other pertinent information to determine whether the project is worth the required investment or not. |   |   |  |
| 1.0 Initiation | Project Charter  | Authorizes the project and enables resource allocation. The chartering process determines the key project members and formally kicks off the project. |   |   |   |
| 2.0 Planning | Project Management Plan  | Helps define how the project will be carried out from start to finish. |   |   |   |
| 2.0 Planning | Project Schedule  | Helps stakeholders plan and track tasks, milestones, and key dates within the project. |   |   |   |
| 2.0 Planning | Requirements Document | Defines particular requirements for a project or product that must be met in order to satisfy the business objectives. |   |   |   |
| 2.0 Planning | Milestone Timeline | A visual illustration of the schedule for major milestones and project deliverables. |   |   |   |
| 3.0 Monitor & Control | Project Register  | Captures and tracks vital project information, making it easier to manage project elements throughout the duration of the project. |   |   |   |
| 3.0 Monitor & Control | Project Meeting Notes  | Documents notes for all project meetings. |   |   |   |
| 3.0 Monitor & Control | Project Status Report  | Communicates the overall health of the project to key team members and stakeholders. |   |   |   |
| 3.0 Monitor & Control | Project Change Request  | Utilized by the Project Manager to request changes to the project scope, costs, schedule, milestones, etc. |   |   |   |
| 3.0 Monitor & Control | Project Test Document | Outlines the testing strategy, objectives, and resources necessary for testing, test estimation, and test deliverables. |   |   |   |
| 4.0 Closure | Lessons Learned  | Identifies the project lessons learned by team members and management to help teams repeat desired outcomes and avoid unfavorable outcomes. |   |   |   |
| 4.0 Closure | Project Closure  | The Project Closure document validates the project’s completion. |   |   |   |

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