**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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