

A woman in an orange sweater is pointing at a whiteboard in a meeting room. Another woman in a denim shirt is standing next to her, looking at the whiteboard. The whiteboard has various diagrams and text, including a flowchart with boxes labeled 'New', 'Notice', 'Short', 'Long', and 'Email'. There are also sticky notes on the wall. The room has a table with laptops and chairs in the foreground.

MTH Consulting Group

MAKING THINGS HAPPEN

# Project documentation management

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## Intro

Project documentation is a vital part of project management. It's also their least favorite thing to do so the things you can usually hear from them are:

"We don't have the time for this at the moment."

"We are working on Agile."

"No one reads those things anyway."

It might seem tiring but complete and organized documentation can make a difference between success and failure of your project.

Without proper management of project documentation, processes could go along undocumented, projects could run off the course and employees could come across difficulties in their everyday work.

In this tutorial we will tackle the issue of managing project documentation, go over best practices and all benefits it can bring.

## What is project documentation management?

Managing project documentation is a process of creating, sharing and organizing project documents. But what exactly do we mean by 'project documents'?

**A project document is any document which has a role in the life cycle of a project. That includes the project charter, project plan, proposals and status reports up until the project closure document.**

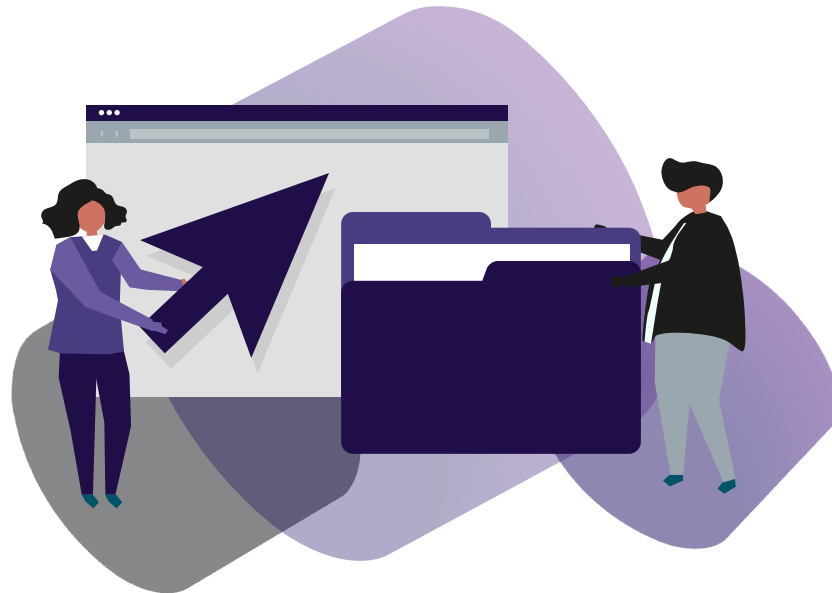


## Key project documents

Now we are getting to the point. In this section we aim at showing you the documents which should be created in every phase of a project.

These documents cover a series of different topics which provide stable progress of the project in every step of the way.

Below you will find a list of key documents for project management which are needed for managing your projects. That way you can guarantee that your team documentation is up to date.



## I Phase - Initiation

### Project Business Case

Business Case is a key document in the project initiation phase.

It should state the capital needed for its completion and give a detailed look into the ways it will be distributed. It should be strong proof why the idea is a legitimate project worth investing in.

Project Name	Sales Team IVR Telephone System		
Project Sponsor	Head of Sales	Project Manager	Name of project manager
Date of Project Approval	3rd March	Last Revision Date	3rd March
Contribution to Business Strategy	Our strategy is to project best in industry customer service, and the current situation does not reflect this. The new IVR system will ensure all calls are answered in a timely manner. It will also ensure that calls are dealt with efficiently. These two facts align this project to the company strategy.		
Options Considered	Options considered included: 1. Adding additional staff to sales team 2. Having a dedicated team for our best customers 3. An IVR system (selected)		
Benefits	1. Increased sales - currently estimated we lose 4% of all sales calls due to current issues. 2. Happier customers - we estimate new customer satisfaction will increase by 10%. 3. Improved LTV - lifetime value of customers will increase by 5% due to the two points above		
Timescales	Initial analysis shows that the system will take approximately 3-4 months to implement.		
Costs	IVR software = \$35,000 Project Management = \$30,000 Software team of 3 for 3 months = \$90,000 Total estimated cost = \$155,000		
Expected Return on Investment	Year 1 = \$0 Year 2 = \$120,000 Year 3 = \$180,000 as LTV begins to be felt.		
Risks	Right now the project looks pretty straightforward but there are still some unknowns surrounding implementation. There is also the risk that the project doesn't meet the sales team or customers needs. For this reason it is recommended to involve the sales team closely.		

## Project Charter

Another key document in the initiation phase is a project charter. It should include general project description and specification of the key roles and responsibilities the team members should have.

All in all, it's a document designed to describe every aspect of the project. It ensures that the whole team is clear on the requests, elements and goals of the given project.

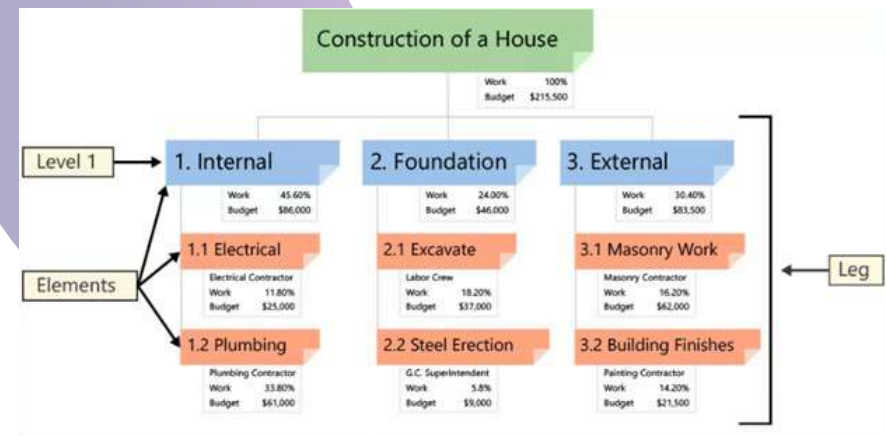
Project name: OrangeDelivery App			
Project description:	A mobile application for ordering foodstuffs and other products from OrangeSupermarket stores. The app will be available on Google Play and App Store.		
Project objectives:	Facilitate ordering foodstuff and other products published on OrangeSupermarket store website via a mobile phone.		
Project is considered successful when:	<ol style="list-style-type: none"> <li>1. The app has a high number of downloads on Google Play and App Store.</li> <li>2. The app has ratings of 4-5 stars on Google Play and App Store and more than 10 positive reviews on each platform.</li> <li>3. The number of OrangeSupermarket store customers grew by 10%.</li> </ol>		
Project participants:	Title:	Name:	
	Investor Project manager Finance manager Team members: Front-end developer Back-end developer QA engineer	Jake McKinsey John Smith Anna Murry  James Thomson Andrew Michaelson Kirsty Watts	
Available resources:	Budget: \$3,000 Testing environment: Apple iPhone 11 Pro; Xiaomi Redmi Note 7		
Milestones:	Status:	Due:	Deadline:
	<ol style="list-style-type: none"> <li>1. Build 1.0 Main functions presentation</li> <li>2. Build 2.0 Adding new features after beta-testing</li> </ol>	1/03/2020 1/04/2020	3/03/2020 4/04/2020
Potential risks:	<ol style="list-style-type: none"> <li>1. The team may not meet deadlines due to adding unplanned in the specification features.</li> <li>2. The team may run out of the budget due to extending development or testing time.</li> </ol>		
Approval:	Title and name:	Date:	
	Investor: John Smith signature _____ Project manager: Ivan Johnson signature _____ Finance manager: Anna Murry signature _____	1/02/2020	

## II Project phase - Planning

### Work Breakdown Structure

In order to ensure that the project will complete its goals within the defined deadlines, the planning phase should be well organized, clear and worked out to the smallest details.

Work breakdown structure document should contain vital information for the team to understand what the project includes in a simple and understandable way. Its main purpose is to split the project into work components and phases.





## Requirement Specification

The next document is requirement specification and it is crucial for the planning phase of project management. It requires a methodical approach in describing the project requirements which should lead to its successful completion. All things considered, these goals are the reason to invest in the project so it's vital to know how to reach them.

<b>Business Requirements Document</b>	
<b>Template Guideline</b>	
To aid in the creation of a successfully completed Business Requirements Definition (BRD) document, please adhere to the following guidelines. For additional instructions and information, please refer to the Enterprise Project Methodology (EPM) Guidebook. <b>Remove these guidelines from the completed document.</b>	
<b>Purpose</b>	A <b>requirement</b> is a documented condition or capability to which the product, service, or system must conform in meeting project objectives. Requirements management is a systematic approach to eliciting, organizing, and documenting the requirements of the product, service, or system. The Business Requirements Definition document serves as the project baseline that explains, in business terms, what is to be accomplished during the Project Design Stage.  Because requirements are dynamic, the BRD is a progressive document in that the objective is to record what is known at the time and then build on it as the project progresses. It is from this document that the more specific design documentation can be produced based on the needs of the project and any unique and/or complementary methodology.
<b>Ownership</b>	The Business Analysis and Project Leads work with the Business Sponsor and any necessary Business or Technical Project Leads to document the business requirements within the BRD. The BRD must be approved before the project can proceed.
<b>When</b> Process Phase: <b>Execute</b> SDLC Phase: <b>Analyze</b>	The Business Requirements Definition document is started during the initial stages of the Execute Phase prior to the Project Design Stage within the project management process lifecycle.  Defining business requirements is a required deliverable on all projects.
<b>Template Completion</b>	Collecting requirements is not as straightforward as it may first appear. It can become challenging because requirements:

## Risk and Issue Log

Risk and issue log is the next vital document needed in the planning phase.

Use the contents of this document to consider potential project risks and note all the best mitigation practices. By introducing risk management practices to your team in the early project phases, you will ensure their awareness and flexibility later on. Also, you guarantee that their time is well spent and avoid most of the (potentially expensive) process mistakes.

	Threat			Opportunity			Current
	Situation	Impact	Likelihood	Situation	Impact	Likelihood	
Current							
Mitigate	<b>adapt:</b> work on the situation to make it less damaging	<b>reduce:</b> lessen the impact	<b>disable:</b> reduce the likelihood	<b>improve:</b> increase benefit of the situation	<b>augment:</b> increase the impact	<b>enable:</b> increase the likelihood	Enhance
Avoid	<b>refocus:</b> change the objectives so that the situation is less important	<b>counteract:</b> make sure the impact does not affect any of the objectives	<b>eliminate:</b> make the occurrence impossible	<b>refocus:</b> change the objectives so that the situation is more important	<b>capture:</b> ensure that the impact is optimal	<b>ensure:</b> make the occurrence certain	Exploit
Transfer	<b>reassign:</b> make someone else take responsibility for dealing with the situation	<b>shift:</b> find someone else to accept the impact in place of the project	<b>outsource:</b> find someone else to work on reducing the likelihood	<b>reassign:</b> make someone else take responsibility for improving the situation	<b>partner:</b> work with someone who has more control over the impact	<b>outsource:</b> find someone to work on increasing the likelihood	Share

## Change Request Management Document

The last document you will need for the planning phase is the Change Request Management Document. You will use this document in order to note the specific details of any project changes your team could come up with so that they can be dealt with reasonably.

Specify all the change details in this document including the subject in question, how it can influence your current project plans (for example, budget or timeline) and how you plan on mitigating the possible disturbance it could create in project execution.

CHANGE-REQUEST FORM			
Project Name:		Project Sponsor:	
The top part of the form is completed by the person requesting the change. The bottom half is completed by the project team. The change requested must be approved before it can be incorporated into the project plan.			
			<b>Urgency:</b> How urgently is the change needed? High, medium, or low.
Change Request #:	Originator:	Change requested by:	Date requested:
Assign a unique number to each change request.	Who completed the change-request form?	Who is requesting the change?	What is the date that the change-request form was completed?
STEP 1 JUSTIFICATION	<b>Description of Change Request #:</b>		
	What is the change that is being requested? Describe what needs to change.		
	<b>Reason for Change:</b>		
	What is the reason for the change? Why does the customer or the team need the change? What is the problem that the change request is supposed to address?		
<b>Proposed Approach to Resolve:</b>			
Is there a proposed approach to how to make the change? Explain that here.			
STEP 2 IMPACT	PROJECT PLAN AREA	IMPACT OF PROPOSED CHANGE(S)	
	Impact on Scope	What changes will need to be made to the scope of the project? Are there new features or functions? Are the customer requirements changing? Are there new customer acceptance criteria?	
	Impact on Risk	What impact will there be on the risk? If there are new potential problems, indicate what the team would do to reduce the risks or their consequences.	
	Impact on Schedule	What change will need to be made to the schedule? What impact will there be on the deadline dates?	
	Impact on Spending	How much more money will be needed?	
	Other	Indicate any other impacts of the proposed change, i.e., changes needed to team composition, issues that could arise.	
STEP 3	<b>APPROVALS TO PROCEED:</b>		
	Originator/Date	Project Leader/Date	Sponsor/Date

### III Project phase - Execution

#### Project Communication Plan

In the execution phase (but also throughout the whole project) efficient communication is necessary. Here the project communication plan comes in.

This document contains clear guidelines for communication between all project stakeholders. It should specify the what, when and how information should be shared in your team. It should also explain how information should be shared and by whom.



Communication	Objective	Frequency	Communication Channels	Communication Methods	Owner	Audience
Project kick-off	Signal the start of the project and share key planning documents.	Once	Email	Group email	Project manager	Entire team
Weekly update	Share progress and guide the team	Weekly	Email, instant message	Slack	Design head	Entire team
Monthly update	Share progress with the management team	Monthly	Email	One-on-one email	Project manager	Management team
Final approval request	Ask for final approval from the team	Once (might need follow-ups)	Email, instant message, project management	Asana, Filestage	Project manager	Management team
Project wrap-up	Share results and best practice	Once	Email	Group email	Project manager	Entire team

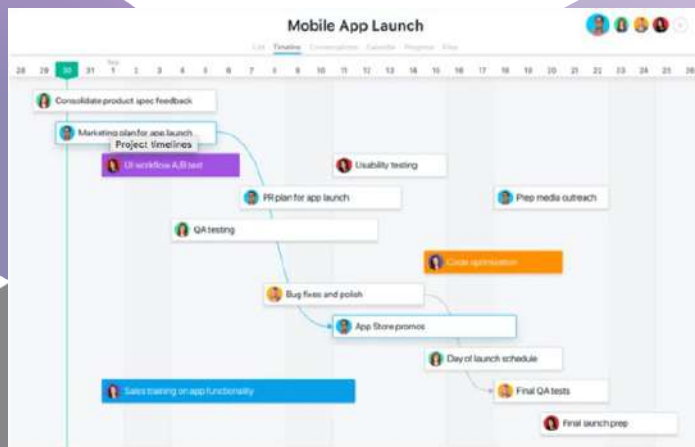


## Project Timeline

The next step in the execution phase requires you to specify a clear and detailed project timeframe which should contain all milestones and deliverables of the project. Timeframe should also clearly note which team member is responsible for which task and its deadline.

Document with a project timeline also allows the project manager to follow the work stream to ensure that no one makes it difficult for the process to go on by handing in their work late.

This document establishes the deadlines for different project components which lead to a stable project progress. By noting these key results in a highly organized way, you will motivate your team to complete them in the defined time frame.



## IV Project phase - Monitoring and Controlling

In the controlling and monitoring phase, the project manager oversees its implementation. They use the documentation such as a communication plan or a project timeframe to ensure that the implementation is going according to plan.

## V Project phase - Closure

This phase consists of all the steps required before a project could be considered formally closed.

### Project Closure Sheet

When a project has been completed, but before the celebration, you have to formally close all processes using the correct documentation. This step requires you to create a project closure sheet.

It is a document which could be used as a written confirmation that all stakeholders have approved the completed project and that their expectations have been met.

## 1 Project Completion

This section identifies the criteria required to complete the project and any outstanding items which still need to be undertaken even though the project may be ready for completion.

### 1.1 Completion Criteria

List the criteria which must be met to confirm that the project is completed. For each criteria listed, assess whether or not it has been achieved to the satisfaction of the customer.

Category	Criteria	Achieved
Objectives	<ul style="list-style-type: none"> <li>The project 'vision' has been achieved (as defined in the Terms of Reference)</li> <li>All project objectives have been achieved (as defined in the Terms of Reference)</li> </ul>	Y/N
Benefits	<ul style="list-style-type: none"> <li>The full benefits have been realized (as defined in the Business Case)</li> </ul>	Y/N
Deliverables	<ul style="list-style-type: none"> <li>All deliverables have been completed (as defined in the Terms of Reference)</li> <li>All deliverables have been accepted by the customer (as per the Acceptance Plan)</li> </ul>	Y/N

### 1.2 Outstanding Items

List any outstanding items which still need to be undertaken even though the project has satisfied the above completion criteria. For each item, list the actions required to be undertaken and the Owner responsible for undertaking the action.

Item	Action	Owner
Activities	List all activities or tasks which have not yet been completed (as defined in the Project Plan)	Name
Risks	List all business risks which have not yet been fully mitigated	Name
Issues	List any current issues which are impacting on the business and have not yet been fully resolved	Name

## Lessons Learned Register

In order to close project processes, you will have to make a Lessons learned register. This document shows what you have learned from the project as a team. It gives the team a chance to share their formal suggestions about what could be done differently the next time around.

This is a key part of the documenting process because it ensures that your team uses the experience in their own advantage (but also sheds a positive light on the mistakes which have been made), so that their success and growth are made possible on future projects.

Lessons Learned		
What went well	What didn't go well	Other learnings
✓	✗	?
	support from project management during client negotiations could be better	
project manager is a great motivator		
	accounting should have been involved earlier	
	lack of experience in oil and gas industry	
		great team work

## Naming documents

Giving documents correct names is an important part of organizing, sharing and tracking project documentation. Our advice is to have a naming convention within the team based on important elements of the project.

The usual practices in naming documents are:

- File names should be short put descriptive (up to 25 char)
- Files should be named consistently
- Avoid special characters and spaces in file names
- Use a bottom line instead of fullstops, spaces or slashes
- Use a date format ISO 8619: GGGGMMDD
- Include the working version count
- Note your naming convention in the data management plan

Elements which should be considered when arranging a naming convention are:

- Creation date (putting the date up front will simplify filtering by date)
- Short description
- Work
- Location
- Name or project number
- Sample
- Analysis
- Version number

The picture below shows examples of naming which, in practice, make documentation search easier. This has proven to be a good practice for large projects where the documentation scope is so large that it's almost impossible to track and find if a convention doesn't exist.

## The prefix/document type (upper case, three characters)

The first three letters of the file name give an indication of the type of document.

Some examples include:

General/operational	
Prefix	Document type
<b>AGR</b>	Agreement
<b>BGT</b>	Budget
<b>COR</b>	Correspondence
<b>EVL</b>	Evaluation
<b>FRM</b>	Form
<b>GDL</b>	Guidelines
<b>IMG</b>	Image
<b>INS</b>	Instructions
<b>INV</b>	Invoice
<b>LST</b>	List
<b>PRE</b>	Presentation
<b>PLN</b>	Plan
<b>PRO</b>	Procedure
<b>PUB</b>	Publication
<b>REP</b>	Report

Teaching/training	
Prefix	Document type
<b>ASS</b>	Assessment
<b>LTE</b>	Learning Teaching Evaluation
<b>LTP</b>	Lesson Teaching Plan
<b>LTR</b>	Learning / teaching resources
<b>SBG</b>	Subject guide
<b>WSH</b>	Workshop

Projects and events	
Prefix	Document type
<b>ACR</b>	Activity Completion Form
<b>CPL</b>	Communication Plan
<b>IIS</b>	Infrastructure Impact Statement
<b>PCR</b>	Project Change Request Form
<b>PIR</b>	Post Implementation Review Report
<b>PNF</b>	Project Notification Form
<b>PPL</b>	Project Plan
<b>PRP</b>	Project Proposal
<b>RMP</b>	Risk Management Plan
<b>SAM</b>	Support and Maintenance Activity Request
<b>STR</b>	Status Report

Committees and meetings	
Prefix	Document type
<b>ACT</b>	Action List
<b>AGD</b>	Agenda
<b>MIN</b>	Minutes and notes
<b>SUB</b>	Submission

**Note:** for Project Management Framework documentation to be sent to the Project Portfolio Office, add "PMF" to the beginning of the file name.

**Example:** PMF\_PRP\_AccessProject\_V1\_20160319.docx

## Storing documentation

Storing team documents in a safe and organized way is important for both bigger and smaller companies and start-ups. The amount of effort you put in taking care of your documentation will pay up when managing risks and avoiding potential problems during execution.

Documentation management could help clear the air if it comes to misunderstandings, spreading false information, cooperation between departments and individuals, and allowing your business to improve and learn faster. But to acquire the benefits of taking care of your documentation, you need an adequate approach in storing your documentation.

Companies are very aware of that and adjust accordingly - 91% of companies are involved with digital transformation and 87% of management see it as a priority.

These tools keep all your team documents in one place so that you can cooperate on projects in different time zones.

In further text you will find our suggestion list of tools which you can use for storing your team documents.

### Quip

Quip has an interactive library for your internal documentation. It allows you to create documents, edit them with your team in real time and share them with other people internally or externally.

**Professional advice:** It allows you to turn emails off in your work process.

Profesionalni savet: Omogućava vam da isključite e-poštu iz radnog procesa.

Pricing:

Quip Starter – 10 USD per month/ per user

Quip Plus – 25 USD per month/ per user

Salesforce Anywhere Advanced – 100 USD per month/ per user

### Google Drive

Google Drive is a good tool for storing and sharing team documents. You can import your own or create documents using Google formats like tables and slides.

Their Google Workspace function is especially suited for team collaboration and includes unlimited storage and spare copies.

**Professional advice:** Google workspace could be accessed from anywhere, including phone and offline.

Pricing:

Business Starter – 6 USD per month/ per user

Business standard – 12 USD per month/ per user

Business Plus – 18 USD per month/ per user

## Microsoft OneDrive

Microsoft OneDrive is currently one of the most popular tools for cloud storing. Most teams prefer Microsoft OneDrive rather than other cloud storing tools because it stores photos and copies of files and keeps them protected, synchronized and available on all devices. It doesn't matter if your team is working on their own tablets or company laptops, they can access all files and be sure they are protected from breaches.

**Professional advice:** OneDrive has an integration with Microsoft 365 which allows team members to collaborate without noticing the differences between the two products.

Pricing: Starts at 1,99 USD per month for 100GB and goes up to 9999 USD per year for 6TB.

## DropBox Business

Business version of Dropbox includes unlimited storage, spare copies of files and team collaboration possibilities so they could work together in a safer and more organized way.

**Professional advice:** Dropbox Business includes unlimited integration possibilities with third party applications so that you can personalize it according to your work processes.

Price:

Basic - 12,50 USD per month/ per user

Advanced - 20 USD per month/ per user

## Benefits of project documentation management

Defining and setting project goals more efficiently

Project documentation guides you towards setting and defining clear goals while making sure that everyone included in the process (project manager and stakeholders) have the same expectations. This process requires you to validate each created document.

Managing project documentation well from the very start means that you will be clear on general and project goals. In return, you will see that your team is sure to actively work on pursuing them.

Supporting the planning phase

Each document has a clear role and function in project documentation. Project managers use them for creating detailed structures for categorizing work which, in return, allows them to make real and achievable timesheets.

Each document which a project manager creates is meant to support the planning process which optimizes and speeds up the project execution.



## Simplifies monitoring

Managing project documentation gives you a complete and thorough understanding of the roles and deadlines which all team members are facing. It makes the project traceable and transparent. At the end of a project, the manager is responsible for evaluation and notes on which aspects should be improved.

## Easy information search

All project documentation is stored in one place. As you can imagine, this allows the team members to find the needed information on a shorter notice.

This will save you some time in searching for key documents while being more productive and focused on your work.

## Process standardization

Defining every step of the business process whether it's the customer journey or onboarding a new employee, you can ensure the quality of processes a person goes through no matter how big your team is.

Standardization is the key for every team work but two advantages worth noting are:

**1. Harmonizing the team.** Standardized processes enable your team to be on the same page. Even if the project team is made of people from different departments, all are following the same flow.

**2. Enhances efficiency.** With standardized processes your workflow is more efficient. Why? Because there is no need to worry about the next steps. Everyone knows what, when and how to do next in order to move the project up.

## Version Control

One of the great things about managing project documents is version control. If you're unfamiliar with the term, version control enables you to follow and have a clear look at the previous versions of the same document. It creates a revision trace so that you could see which changes were made and who made them.

As a result, the quality of project documentation is maintained on a high level.

Version control software we recommend are **Git**, **CVS** and **SVN**.

## Conclusion

If you're looking to upgrade the level of organization on your projects, we hope we've been able to show you how much you can get from establishing a clear project documentation management system.

We've tried to point out a simple and efficient way you can do so and see that your project goes on without problems. Mark all fields, meet each deadline, follow up on team effort and create consistently top notch content - good organization is everything.





# MTH Consulting Group

MAKING THINGS HAPPEN

[mth.rs](http://mth.rs)

[contact@mth.rs](mailto:contact@mth.rs)