

IT Project Documentation Summary

The IT Project Documentation Summary Table provides a list of the “Required Information” for a project based on project complexity. The templates listed in this table, from the Commonwealth Project Management Guideline, are formats for “Required Information,” based on best practices. The Commonwealth Project Management Guideline templates are identified with the word “(Template).” The only required templates in this table are the Project Charter, Project Proposal, Preliminary Risk Analysis, Cost Benefit Analysis, and the Project Closeout Report template. Templates have been incorporated into the portfolio management tool.

| Project Documentation Summary | | | | |
|--|---|-----------------|-------------------|----------------|
| Documentation | Required Information | High Complexity | Medium Complexity | Low Complexity |
| Project Development Approval | | | | |
| Project Charter (Template) | | | | |
| | Template Required as Provided | X | X | X |
| Project Proposal (Template) | | | | |
| | Template Required as Provided | X | X | X |
| Preliminary Risk Analysis (Template) | | | | |
| | Template Required as Provided | X | X | X |
| Cost Benefit Analysis (Template) | | | | |
| | Template Required as Provided | X | X | X |
| Project Complexity Model (Template) | | | | |
| | Template Required as Provided | X | X | X |
| Project Planning | | | | |
| Project Plan Executive Summary (Template) | | | | |
| | Points of Contact | X | | |
| | Contractor Information | X | | |
| | Charter - Summary | X | | |
| | Business Problem | X | X | X |
| | Assumptions | X | X | X |
| | Project Description | X | X | X |
| | Project Scope | X | X | X |
| | Summary Statement - Appendices | X | | |
| Project Performance Plan (Template) | | | | |
| | Project Business Objectives, Goals and Metrics | X | X | X |
| | Deliverable Description and Acceptance Criteria | X | X | |
| Work Breakdown Structure (Template) | | | | |
| | WBS Elements | X | X | |
| | Resource Requirements | X | X | |
| Resource Plan (Template) | | | | |
| | Resource Allocated | X | | |
| | Resource as related to task, cost and duration | X | | |

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| | Resource differences from project charter | X | | |
| Project Schedule (Template) | | | | |
| | WBS Elements | X | X | X |
| | Estimated Duration | X | X | X |
| | Start and Finish Dates | X | X | X |
| | Resource Requirement | X | X | X |
| | Predecessor Task (if applicable) | X | X | X |
| Budget Plan (Template) | | | | |
| | Funding Source | X | X | X |
| | Planned Expenditures by WBS Elements | X | X | |
| | Contingency (Risk) Budgeting | X | X | |
| | Planned Expenditures | X | X | |
| | Project Spending Plan | X | X | |
| Procurement Plan (Template) | | | | |
| | Products, Goods, or Services to be Procured | X | | |
| | Procurement Schedule – Task/Procurement Matrix | X | X | |
| Risk Management Plan (Template) | | | | |
| | Risk Management Strategy | X | | |
| | Risk Identification Process | X | X | X |
| | Risk Evaluation | X | X | X |
| | Risk Mitigation Options | X | X | X |
| | Risk Plan Maintenance | X | | |
| | Risk Management Responsibilities | X | X | |
| | Risk Mitigation Cost | X | | |
| | Contingency (Risk) Budget | X | X | |
| Communications Plan (Template) | | | | |
| | Stakeholder Information Requirements | X | | |
| | Information Descriptions, Collection, and Reporting | X | | |
| | Distribution Methods | X | | |
| | Distribution Groups | X | | |
| | Method for Updating the Communications Plan | X | | |
| Change and Configuration Management Plan | | | | |
| | Change Control Items | X | X | |
| | Change Control Process | X | X | |

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| | Configuration Management Control Items | X | X | |
| | Configuration Management Control Process | X | X | |
| | Naming and Marking Methods | X | | |
| | Submission and Retrieval of Control Items | X | | |
| | Version Control | X | | |
| | Storage, Handling, and Disposition of Project Media | X | | |
| Quality Management and IV & V Plan (Template) | | | | |
| | Product Testing | X | X | |
| | Project Auditing | X | | |
| | IV & V for Major IT Projects only (see section 2.4 for specific requirements) | X | X | X |
| Project Execution and Control | | | | |
| Project Status Report (Template) | | | | |
| | Previous Period Status | X | X | |
| | Current Period Status | X | X | |
| | Significant Accomplishment (Current Period) | X | X | X |
| | Planned Activities for Next Period | X | X | X |
| | Project Issues | X | X | X |
| | Action Items | X | X | |
| | Risk Status | X | X | |
| | Resource Usage | X | X | |
| Change Control Request (Template) | | | | |
| | Proposed Change Description | X | | |
| | Justification for Proposed Change | X | | |
| | Impact Statements | X | | |
| | Change Request Initial Review and Management Decision | X | | |
| Change Control Request (Template) | | | | |
| | Proposed Change Description | X | | |
| | Justification for Proposed Change | X | | |
| | Impact Statements | X | | |
| | Change Request Initial Review and Management Decision | X | | |
| Issue Log and Issue Management Document (Template) | | | | |
| | Issue Type | X | | |
| Project Execution and Control | | | | |
| Project Status Report (Template) | | | | |

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| | Planned Activities for Next Period | X | X | X |
| | Project Issues | X | X | X |
| | Action Items | X | X | |
| | Risk Status | X | X | |
| | Resource Usage | X | X | |
| Change Control Request (Template) | | | | |
| | Proposed Change Description | X | | |
| | Justification for Proposed Change | X | | |
| | Impact Statements | X | | |
| | Change Request Initial Review and Management Decision | X | | |
| Issue Log and Issue Management Document (Template) | | | | |
| | Issue Type | X | | |
| | Potential Impact | X | | |
| | Issue Assignment | X | X | |
| | Issue Resolutions Alternatives and Recommendations | X | X | |
| | Management Action, Recommendation and Approval Signatures | X | | |
| User Acceptance (Template) | | | | |
| | Project Deliverables and Acceptance Criteria Validation | X | X | |
| | Outstanding Issues and Resolution Plan | X | X | |
| | Acceptance Signatures | X | X | |
| Project Closeout Report (Template) * | | | | |
| | Full Template | X | X | X |
| Operations and Support | | | | |
| Post Implementation Report for Major IT Projects | | | | |
| | How well the deliverable solved the Business Problem identified in the project charter | X | X | X |
| | Impact the deliverable had on the Agency Core Business Activities | X | X | X |
| | Project Performance Measures | X | X | X |
| | Actual operational cost versus projected operational cost | X | X | X |
| | User acceptance or satisfaction with the delivered product | X | X | X |

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| | Organizational change required or resulting from the deliverable | X | X | X |
| | Actual Return on Investment for the period versus projected return on investment | X | X | X |

* Major and non-major IT projects > \$100,000