

**SEATTLE CHILDREN'S RESEARCH INSTITUTE
OPERATING / PROCEDURES**

DEPARTMENT: Project Management Office (PMO)
POLICY NUMBER: PMO-02
REPLACES: RPM-PMO-002
EFFECTIVE DATE: September 21, 2007
REVISION DATE: September 24, 2008
POSTED FROM: _____

TITLE: Project Documentation

SUMMARY:

All projects managed by the PMO require a minimum amount of documentation. Approved copies of these documents must be stored in both electronic and hardcopy format in three distinct locations: the electronic copy should be stored in the PMO shared drive and the hardcopies should be stored in the Director's document binder and the Project Leader's document binder.

Upon completion of the project, the Project Leader's document binder is sent to the project sponsor; the Director's document binder is stored in the PMO's physical archive and the electronic documents moved to the archived projects folder on the PMO shared drive.

POLICY/PROCEDURE:**The goals of this policy are to:**

- Outline minimum required documentation for projects.
- Ensure the minimum required documents are stored and managed in a standard manner.

02-1.1 The minimum required project documentation may be separated into two categories, planning documents and working documents. All of the documents below are required for projects lasting 30 days or longer. A subset, indicated with an asterisk, is required for projects less than 30 days.

02-1.2 Minimum required **planning documents** are:

- 02-1.2.1 Project Initiation Form*
- 02-1.2.2 Project Charter*
- 02-1.2.3 Risk Plan
- 02-1.2.4 Work Breakdown Structure
- 02-1.2.5 Schedule/Timeline*
- 02-1.2.6 Communication Plan

02-1.3 Minimum required **working documents** are:

- 02-1.3.1 Responsibility Assignment Matrix

- 02-1.3.2 Progress Reports*
- 02-1.3.3 Budget
- 02-1.3.4 Issue Log
- 02-1.3.5 Lessons Learned*

02-1.4 Upon project initiation, two project documentation binders (Director's binder and the Project Leader's binder) with tabs for the minimum required documentation should be created.

02-1.5 The Project Leader's document binder should be kept current throughout the project. The Director's document binder must be an exact duplicate at project completion.

Planning Documents

02-1.6 As project documents are approved by the appropriate party, a PDF version of the document should be created and saved on the PMO shared drive.

02-1.7 Hard copies of the PDF should be printed and stored under the appropriate tab in both the Director's and Project Leader's binders.

02-1.8 In the event of a planning document change, old versions of the document should NOT be discarded. A new PDF should be created and saved in the PMO shared folder with the revision date in the document title. The updated hardcopies should be placed in both document binders and sorted with the most recent update leading.

Working Documents

02-1.9 Working documents don't require approval so they may be placed in the PMO shared folder and the document binders in their current format (e.g. MS Word, Excel, Visio, etc...)

02-2.0 As working documents are updated, they should REPLACE the existing documentation in the shared folder and document binders.

Submitting Office: Project Management Office (PMO)

Approved by:

\s\ Heather Lindemann, PMP, Director of Project Management & Strategic Initiatives, 09/24/2008

\s\ Approver Name, Title, Date