PMP Bootcamp: Navigating Project Documents – Your Information Hubs

Student Name: _____ **Date:** _____

Instructions: Projects generate a lot of information! Project documents are the formal records that capture this information, guide work, track progress, and facilitate communication. Understanding these documents will help you see how a project is managed from start to finish.

Core Concept Reminder (from PMBOK 7 & Rita):

- **PMBOK 7th Edition:** Refers to these as "Artifacts" and emphasizes that the specific documents and their formality should be **tailored** to the project's context, size, and complexity. The focus is on ensuring the *right information* is available to the *right people* at the *right time* to deliver **value**.

- **Rita Mulcahy's PMP Exam Prep (11th Ed.):** Highlights that these documents are not just created and forgotten; they are *used* by the Project Manager and team to manage the project effectively. Many are "living documents" updated throughout the project.

Part 1: Key Project Documents – What Are They & Why Do We Need Them?

For each document listed below, briefly describe its **Primary Purpose** and a **Key Piece of Information** it typically contains.

1. **Project Charter**

   o **Primary Purpose:** _____

   o **Key Information:** _____

2. **Assumption Log**

   o **Primary Purpose:** _____

   o **Key Information:** _____

3. **Issue Log**

   o **Primary Purpose:** _____

   o **Key Information:** _____

4. **Estimates (e.g., Cost Estimates, Duration Estimates) & Basis of Estimates**

   o **Primary Purpose
   (Estimates):** _____

- Primary Purpose (Basis of Estimates): _____

- Key Information (Estimates): _____

- Key Information (Basis of Estimates): _____

5. **Lessons Learned Register**

    - **Primary Purpose:** _____

    - **Key Information:** _____

6. **Team Charter**

    - **Primary Purpose:** _____

    - **Key Information:** _____

7. **Project Schedule**

    - **Primary Purpose:** _____

    - **Key Information:** _____

8. **Resource Calendars**

    - **Primary Purpose:** _____

    - **Key Information:** _____

9. **Work Performance Reports (e.g., Status Report, Quality Report, Risk Report)**

    - **Primary Purpose:** _____

    - **Key Information:** _____

10. **Resource Requirements**

    - **Primary Purpose:** _____

    - **Key Information:** _____

11. **Requirements Documentation (e.g., Business Requirements, Stakeholder Requirements, Solution Requirements)**

    - **Primary Purpose:** _____

    - **Key Information:** _____

12. **Change Log**

- o **Primary Purpose:** _____

- o **Key Information:** _____

13. **Agreements / Contracts**

- o **Primary Purpose:** _____

- o **Key Information:** _____

14. **Statement of Work (SOW) – especially for procurement**

- o **Primary Purpose:** _____

- o **Key Information:** _____

15. **Risk Register**

- o **Primary Purpose:** _____

- o **Key Information:** _____

16. **Forecasts (e.g., Estimate to Complete - ETC, Estimate at Completion - EAC)**

- o **Primary Purpose:** _____

- o **Key Information:** _____

17. **Quality Metrics**

- o **Primary Purpose:** _____

- o **Key Information:** _____

Part 2: Document Detective – Matching Activity

Match the situation or need on the left with the *primary* project document on the right that would provide the necessary information or be updated. Each document is used only once.

Situation / Need		**Project Document**
1. The CEO wants to know if the project is still expected to finish on budget.	____	A. Assumption Log

2. A team member is unsure about the agreed-upon ground rules for team meetings. ____ B. Change Log

3. We need to formally authorize the project and empower the PM. ____ C. Project Schedule

4. A stakeholder wants to see all the approved and rejected changes to the project. ____ D. Issue Log

5. We need to identify who will be working on specific tasks next month. ____ E. Lessons Learned Register

6. A critical supplier is not delivering on time. This needs to be tracked. ____ F. Quality Metrics

7. The team is unsure about what "done" means for a specific deliverable. ____ G. Requirements Documentation

8. During planning, the PM noted that a key resource *should* be available in Q3. ____ H. Resource Calendars

9. At the end of a phase, the team wants to document what could be improved. ____ I. Project Charter

10. We need to define exactly what product a seller will provide for us. ____ J. Risk Register

K. Team Charter

L. Statement of Work (SOW)

M. Forecasts (EAC/ETC)

Part 3: The Living Nature of Documents – Insight Questions

1. **Dynamic Documents:** Many project documents are not static; they are created and then updated throughout the project. Name two documents from the list that are typically "living documents" and explain *why* they need to be regularly updated.

   o Document 1: _____ Why: _____

   o Document 2: _____ Why: _____

2. **Interconnections:** Project documents are often related. How might the **Requirements Documentation** influence the creation of the **Project Schedule** and **Cost Estimates**?

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3. **PMBOK 7 & Tailoring:** A small internal project to update a company webpage will have different documentation needs than a large, complex project to build a new power plant. Give an example of a document from the list that might be very detailed for the power plant project but much simpler (or even informal) for the webpage project. Explain your reasoning.

   o Document: _____

   o Reasoning: _____

Key Takeaway: Project documents are essential tools for the Project Manager and the team. They provide clarity, facilitate communication, enable control, and capture vital project information. Knowing which document to use, create, or update in different situations is a key PM skill!