**Common Project Documents**

Below is an explanation of the common project documents used by Project Managers followed by a cheat sheet to help you understand when these documents are created and who uses them.

1. Project charter, statement signed by executive sponsor giving authority for the project to the PM
2. Statement of work, written exposition of the project
3. Device schedule, a table with number of devices per location, similar to a takeoff
4. Responsibility matrix, a table listing all of the tasks and assigning responsible parties
5. Project schedule, often a Gantt chart but can be a table or timeline showing project phases, WBS, milestones, task durations, and completion dates.
6. Submittals, product data sheets or cut sheets identifying the exact make and model of parts being used.
7. Design drawings, a minimum set of design drawings include floor plans showing device locations, a riser diagram showing the relationship of devices connected by single lines, and wall, door and rack elevations. Approved record drawings are essential
8. Load and heat calculations are needed for HVAC and emergency power sizing. The actual calcs are usually done by others but the raw data must be provided
9. Cable sizing and line loss calculation are needed to assure devices at the end of cable runs will operate
10. Conduit fill calculations are needed to double check conduit provided by EC.
11. Video recorder retention calculations help determine the size of recorders based on many variables.
12. Resource allocation table, shows the number of resources required over time. Can be done inside a Gantt chart but often is easier to do in a spreadsheet.
13. Cash flow analysis tracks expenditures and income over time. It can be connect to the schedule and resource allocation. Needed to plan for possible bank loans, accruals, etc.
14. Schedule of values, a method of progress billing based on work performed. It is established at the beginning of the project with the client. It can be directly tied to the project schedule and milestones and the cash flow analysis.
15. Risk register, a method of considering possible risks, assigning probabilities of occurrence, severity of impact, and methods of dealing with incidents.
16. Earned value analysis, a method of tracking project costs over time that gives a better picture of project financial health. Tied to work packages within the project schedule and cash flow analysis. Good for longer duration high value projects, less appropriate for smaller faster projects.
17. Meeting minutes. Often generated by others. If that’s the case should be reviewed and commented on. Also make sure to have important items added to the agenda.
18. Meeting notes. Get a hardbound notebook and take copious notes
19. As built drawings
20. Notice of completion

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| Item | What project document? | When is it created? | Who is it created by? | Who is it created for? |
| 1 | Project charter | At project start | Executive sponsor | PM |
| 2 | Statement of work | At project start | PM | All |
| 3 | Device schedule | Bid phase | PM | All |
| 4 | Responsibility matrix | Bid phase | PM | All |
| 5 | Project schedule | At project start | PM | All |
| 6 | Submittals | At project start | PM | All |
| 7 | Design drawings | At project start | Designers | All |
| 8 | Load/heat calc (raw data) | At project start | PM | Contractors |
| 9 | Line loss calc | Bid phase | Designers | PM |
| 10 | Conduit fill | At project start | Designers | PM |
| 11 | Recorder retention | Bid phase | Designers | PM |
| 12 | Resource allocation | At project start | PM | Ops |
| 13 | Cash flow analysis | At project start | PM | Finance, Exec sponsor |
| 14 | SOV | At project start | PM | Owner |
| 15 | Risk register | At project start | PM | PM, exec sponsor |
| 16 | Earned Value | At milestones | PM | Exec sponsor |
| 17 | Minutes | Promptly after meeting | PM | All |
| 18 | Meeting notes | Always | PM | PM |
| 19 | As-built | Project close | Designers | Owner |
| 20 | Notice of completion | Project close | PM | Owner |