

# Introduction

The *Project Management Book of Forms* is designed to be a companion to *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*—Fourth Edition. The purpose is to present the information from the *PMBOK® Guide*—Fourth Edition in a set of forms and reports so that project managers can readily apply the concepts and practices described in the *PMBOK® Guide*—Fourth Edition to their projects.

The *PMBOK® Guide*—Fourth Edition identifies that subset of the project management body of knowledge generally recognized as good practice. As an ANSI Standard, it does not describe how to apply those practices, nor does it provide a vehicle for transferring that knowledge into practice.

This *Book of Forms* will assist project managers in applying information presented in the *PMBOK® Guide*—Fourth Edition into project documentation. The *Book of Forms* does not teach project management concepts or describe how to apply project management techniques. Textbooks and classes can fulfill those needs. This book provides an easy way to apply good practices to projects.

Since one of the defining factors about projects is that they are unique, project managers must tailor the forms and reports to meet the needs of their individual projects. Some projects will require information in addition to what is presented in these forms; some will require less. These forms are presented in paper format and electronic versions to make them easy to adapt to the needs of specific projects. They follow the information in the *PMBOK® Guide*—Fourth Edition but can be adapted to meet the needs of the project manager and specific projects.

## AUDIENCE

This book is written specifically for project managers to help manage all aspects of the project. Those new to project management can use the forms as a guide in collecting and organizing project information. Experienced project managers can use the forms as a template so that they collect a set of consistent data on all projects. In essence, the forms save reinventing the wheel for each project.

A secondary audience is the manager of project managers or a project management office. Using the information in this book ensures a consistent approach to project documentation. Adopting these forms on an organizational level will enable a repeatable approach to project management.

## ORGANIZATION

The forms are organized by process group: initiating, planning, executing, monitoring and controlling, and closing. Within those process groups, the forms are arranged sequentially as presented in the *PMBOK® Guide*—Fourth Edition.

A description of each form is presented along with a list of contents. For the planning forms, there is a description of where the information in the form comes from (inputs) and where it goes to (outputs). For some

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forms, there is a list of related forms. On the page(s) to come, a blank copy of the form is presented, followed by a copy of the form with a description of the information that goes into each field. In the back of the book, there is a completely editable CD-ROM with a copy of all the blank forms. All forms are in Microsoft® Office software for ease of tailoring.

Some forms are included that are not mentioned in the *PMBOK® Guide*—Fourth Edition. These are forms that assist in managing a project but are not considered part of the project management standard.

Not all forms will be needed on all projects. Use the forms you need, to the degree that you need them, to assist you in managing your projects.