Project Charter and Project Management Plan Template

**Release History**

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| **Issue Date** | **Version** | **Owner** | **Change Description** |
| 14 Mar 2013 | 1.0 | Don Krapohl | Draft |
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# Business Information

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| **Request Date** | **Project Name** |
| 13 Mar 2013 | Business Development Capture Management. Portal |
| **Prepared By** | **Customer Name** |
| Don Krapohl | Joe Exec, ACustomer |

# Project Description

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| **Project Type** | **Project Status** | **Desired Completion Date** |
|  | New  Upgrade to Existing | 14 May 2013 |
| **Objectives (What do you want to accomplish?)** | | |
| Create a suite incorporating collaboration, site templating, document templating, and supporting business capture workflows. | | |
| **Stakeholders (Who is involved or needs to know?)** | | |
| Joe Exec, VP, Sales  Jim Cap, VP, Capture Management  Robbie Beadie, Director, Business Development  Richard Marshall, Program Manager, Major Program | | |
| **Project Scope (What is in or out of scope of this effort?)** | | |
| In scope:   * SharePoint site for internal use only * Base/master site * Capture Management site template * Capture Management site template will include templates for all process deliverables * Capture Process workflow * Capture roles as security and audience classifiers * SharePoint out-of-the-box search * SharePoint capture process work queue web part—current user (user level) * SharePoint task list integration with Outlook * Project management of the project * Gathering templates   Out of scope:   * Reports * Dashboards * Integration with any external data sources * Modification of any document templates or facilitation of/dependency on same * New technology implementation outside SharePoint built-in functionality * Loading of any content (any documents produced outside this site) except for document templates * Any other web part except the work queue web part * Analytics, aggregation, text parsing, email parsing, semantic indexing, or any other form of machine learning/artificial intelligence | | |

# Project Information

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| **Assumptions** |
| * All document templates exist for the capture process * A site collection can be provisioned on the Company’s internal SharePoint instance * No third-party tools will be used * No visualization of reports will be created * The project will be fully funded * The process to be covered is solely from strategy to post-submission |
| **Issues** |
| NSTR. |
| **Risks** |
| * The corporate SharePoint governance may scale back the capabilities of SharePoint. * Project may not be funded to completion. * Process and standards document deconstruction appears to have missing and disconnected elements that need to be reconciled, such as gaps in document specifications. |
| **Acceptance Criteria** |
| * Functioning base site with standards library/links to same * Long and fast track proposal workflows including initiation triggers * Long and fast track proposal site templates * Collection of appropriate site templates for capture process |