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 |
|  |  |  |  |

# 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 [x]  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, SalesJim Cap, VP, Capture ManagementRobbie Beadie, Director, Business DevelopmentRichard 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
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# 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
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| **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.
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| **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
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