

Project Charter

Project Charter is one of the project management document you can create with our [project management lifecycle tool](#).

Project charter is a document that describes what the project is and how to approach it. It lists the stakeholders, the final deliverables and their acceptance criteria. It's a key document in project management, and the team will refer to it throughout the life cycle of the project. The following sections describe the contents of a typical Project Charter document in detail.

This article shows you how to develop a Project Charter.

Activity 1: Assign Project Manager

Assigned by the project sponsor, project manager is responsible for managing and completing the project on behalf of the sponsor. The project manager develops the Project Charter and maintains all project documentation during the course of the project.

Activity 2: Confirm Project Summary

Provide a description of the project and the business needs it intends to fulfill. The information will be pre-populated based on project summary provided when developing the project proposal. In this step, you need to review and possibly revise the project summary.

E-Octopus * - Visual Paradigm Enterprise

Dash Project ITSM UeXceler Diagram View Team Tools Modeling Window Help

... Confirm Project Summary Project Summary

Open Reference

Project Summary

Project Description

The library of University of Buttonwood was established in 1984 to meet the information needs of students and teachers of the four departments (Engineering, Construction, IT, and Business Administration). It is one of the longest operating units in the campus. Octopus, the university's Library Management System (LMS) was introduced in 1990. In the past year, over 73% of university's teaching staff have used the library services provided by Octopus. For the past several years the library has been subject to a decline in operational efficiency because of the inability of the Octopus LMS to meet the latest library service needs. The poor information technology (IT) support inhibit students' desire to use library services. According to a campus survey conducted by the Student Association (SA), about 70% of students are dissatisfied with the Octopus LMS. 87% of them say that the site was too slow, 62% of them found the site crashed when running in mobile devices, 31% of the students want to reserve electronic and digital resources online, which is not supported right now. The E-Octopus (Enhanced Octopus) project has been created to address and correct these issues. Another goal of the project is to support the analysis of students' book borrowing behavior.

Statement of Need or Opportunity

Octopus, the Library Management System (LMS) of University of Buttonwood was developed in late 80s. Although the system has undergone several re-engineering all these years, the focuses were mostly to make the system runnable in latest operating systems. There were nearly no enhancements made to support the latest library service needs such as the ability to search and reserve digital resources, and the capability to remind patron for the return of book via SMS. Other than the functional aspect of the system, the fact that the system was built with old technologies make it performs badly and not scalable. The most outstanding problem is that it runs slower and slower due to large and increasing volume of book and patron data. It is also not responsive in mobile devices. All these issues inhibit students' desire to use library services, which is reflected both in the campus survey and from the system statistic - the number of users has shown a decline in the three consecutive years. The university has decided to make radical changes to the Octopus LMS to address and correct these issues. Besides, the university wants to take this opportunity to support the analysis of students' book borrowing behavior. The university intends to collect and use the system data to analyze the relationship between students' academic performance and their borrowing behavior.

Business Objective(s)

Objective	Alignment with Strategic Initiatives/Business Problems
Enhance the search feature to support searching digital and electronic resources	Support latest library service needs

Activity 3: Review Project Risks

Identify risks to which the project will be exposed. Assess likelihood of each risk occurring and

its impact on the project.

The screenshot displays the 'Potential Risks / Negative Impacts' section of the E-Octopus software. It features a table with three columns: Risk, Likelihood, and Impact. The risks listed are: 'The interface with backend system may not be compatible' (Likely), 'Copying of production data may not be allowed during office hour' (Possible), and 'Severe weather condition in July may impact progress' (Likely). Each risk has a corresponding impact and mitigation strategy. Below this, the 'Security Considerations' section is visible, listing initiation and planning tasks.

Potential Risks / Negative Impacts	Risk	Likelihood	Impact	Mitigation & Contingencies
	The interface with backend system may not be compatible	Likely	Unable to access the new system from backend system.	Given that the backend system is not modifiable under this project, the development of new interface is a likely option.
	Copying of production data may not be allowed during office hour	Possible	The team may need to build and test with outdated data, which affects the quality of work.	Copy production data once per day, at 8:00 AM. If possible, make it an automated task.
	Severe weather condition in July may impact progress	Likely	A delay of project schedule	2 weeks buffer will be given

Security Considerations

The following security considerations will be made throughout the project:

- Initiation:**
 - Does security impact the cost/benefit of the project or potential solution?
 - Will there be any security deliverables?
- Planning:**

Activity 4: Confirm Customers and Final Deliverables

Identify who will benefit from this project, and list the key outputs from the project, known as the final deliverables.

The screenshot displays the 'Customers and Final Deliverables' section of the E-Octopus software. It features a table with two columns: Customers/Beneficiary and Needs and Concern. The customers listed are: Students, Teaching staff, Library staff, and University Education Committee. Each customer has a corresponding need and concern. Below this, the 'Final Deliverables' section is visible, listing the deliverable and its description.

Customers/Beneficiary	Needs and Concern
Students	A well-performed Library Management System that allows them to access online library services like resource reservation, catalog searching, etc.
Teaching staff	A well-performed Library Management System that allows them to access online library services like resource reservation, catalog searching, etc.
Library staff	A well-performed Library Management System that allows users to access the services that want, which in turns reduces the workload of library staff.
University Education Committee	The capability to analyze the relationships between students' academic performance and their reading habits in defining and establishing ongoing educational philosophy, policy and standard of the university in respect of teaching, learning and assessment.

Final Deliverables

Deliverable	Description	Planned Time of Completion
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Activity 5: Confirm Project Success Criteria

Identify the principles or standards used to determine or judge project success. The information

will be pre-populated based on the project success criteria entered before. In this step, you need to review and possibly revise the information entered.

The screenshot shows the 'Project Success Criteria' step in the E-Octopus * - Visual Paradigm Enterprise application. The breadcrumb navigation shows 'Confirm Project Success Criteria' and 'Project Success Criteria'. The main content area displays the 'Process Success Criteria' section with a text box containing the following text: 'Success for the E-Octopus project will be achieved when a fully tested E-octopus LMS, the Android version of E-Octopus, and all technical documentation are fully deployed within the time and cost constraints indicated in Project Charter. Success will be determined by the Project Sponsor, Mr. Frederick S. Ison, who will also authorize completion of the project.' A 'Finished. Back to Process Steps.' button is visible at the bottom right of the main content area.

Activity 6: Confirm Critical Success Factors

Review and possibly revise the factors that must be in place to ensure success of the proposed solution.

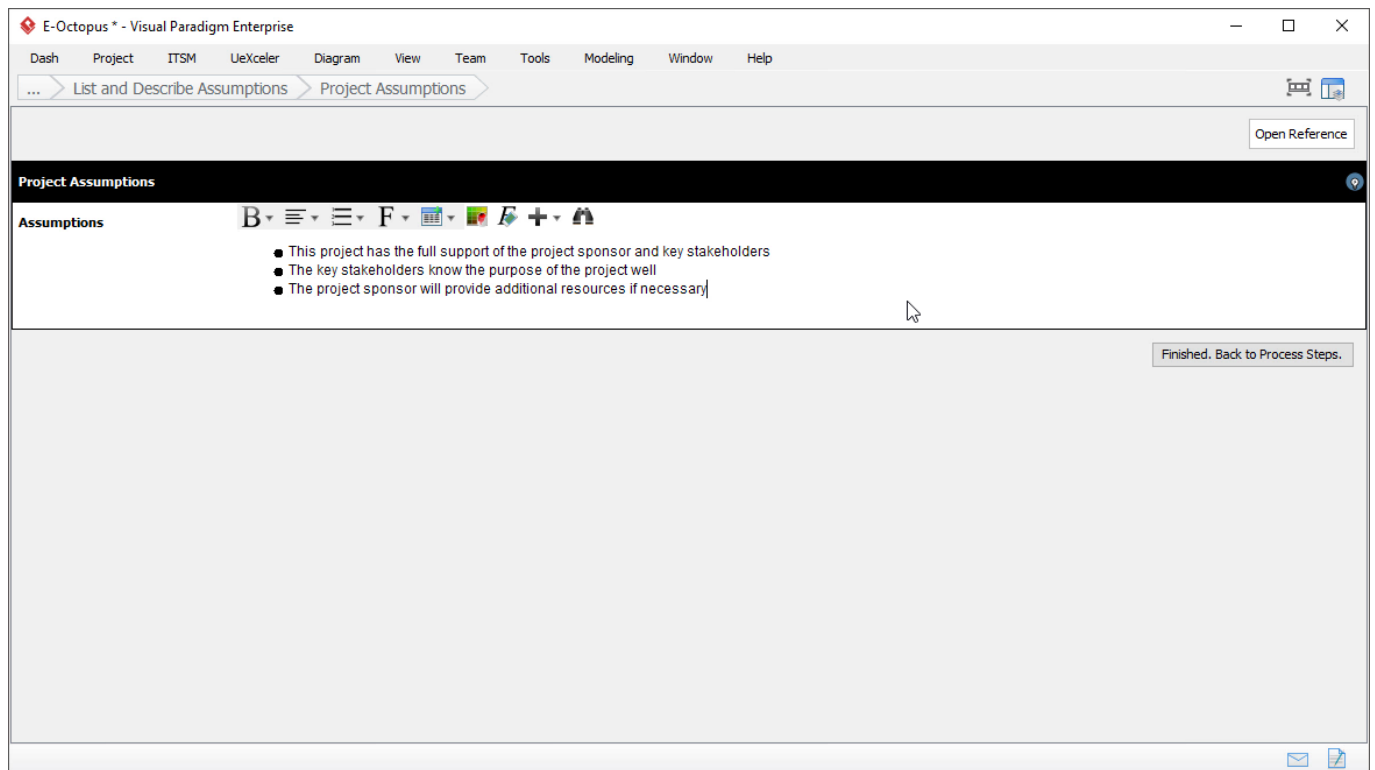
The screenshot shows the 'Critical Success Factors (CSFs)' step in the E-Octopus * - Visual Paradigm Enterprise application. The breadcrumb navigation shows 'Confirm Critical Success Factors' and 'Critical Success Factors (CSFs)'. The main content area displays a table with the following data:

Critical Success Factor (CSF)	Description
Ability to develop mobile apps	<p>Enter input here.</p>
Ability to develop mobile apps	An Android version of E-Octopus LMS will be developed, which requires the related mobile apps design and development skills
Ability to quickly and safely integrate services, features and subsystems	The analytic feature has to retrieve students' academic record from the existing, core database. It is important to ensure the communication is performed smoothly and safely.
Commitment from key stakeholders	Key stakeholders must be easily accessible throughout the project lifecycle in clarifying requirements
Control of resource	Resource must be made available on or before the data stated in Project Charter and resource plan.

A 'Finished. Back to Process Steps.' button is visible at the bottom right of the main content area.

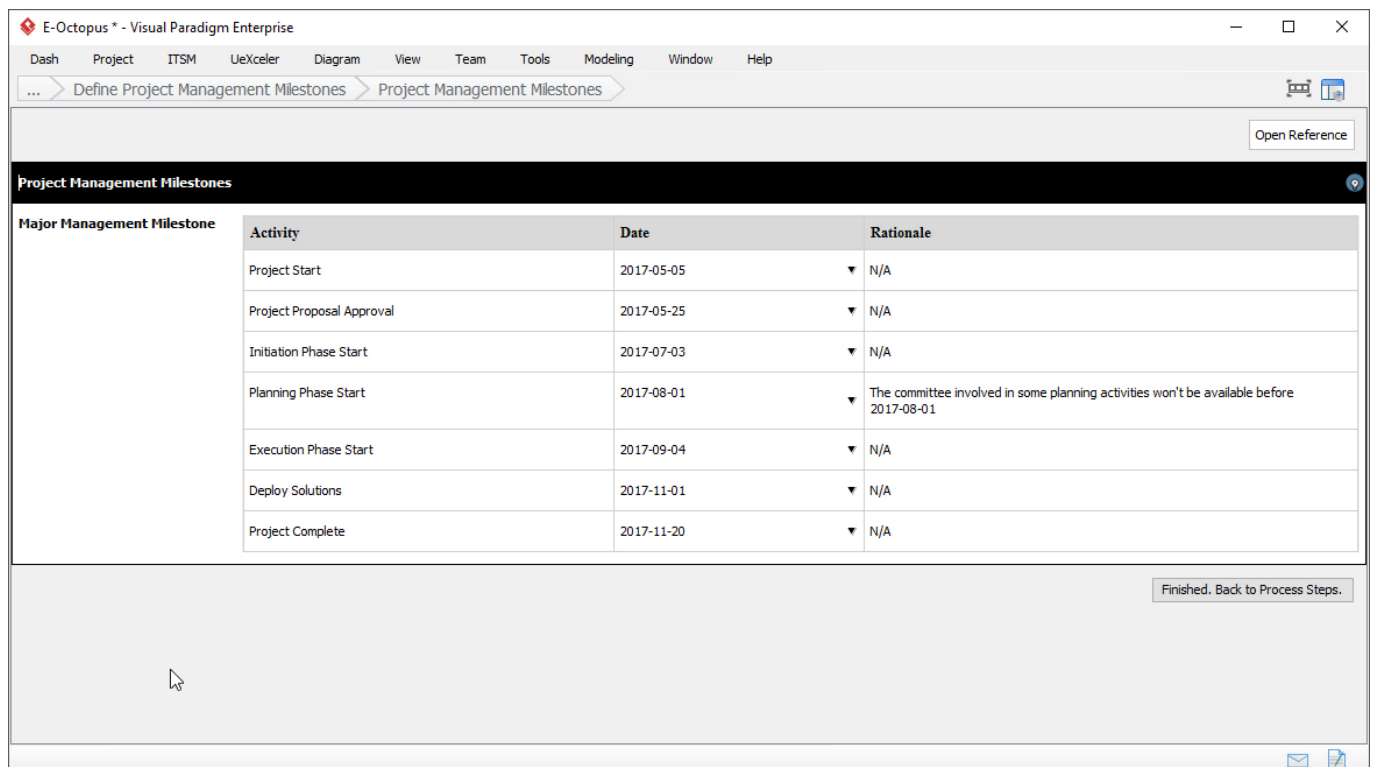
Activity 7: List and Describe Assumptions

List and describe assumptions made in the decision to charter this project.



Activity 8: Define Project Management Milestones

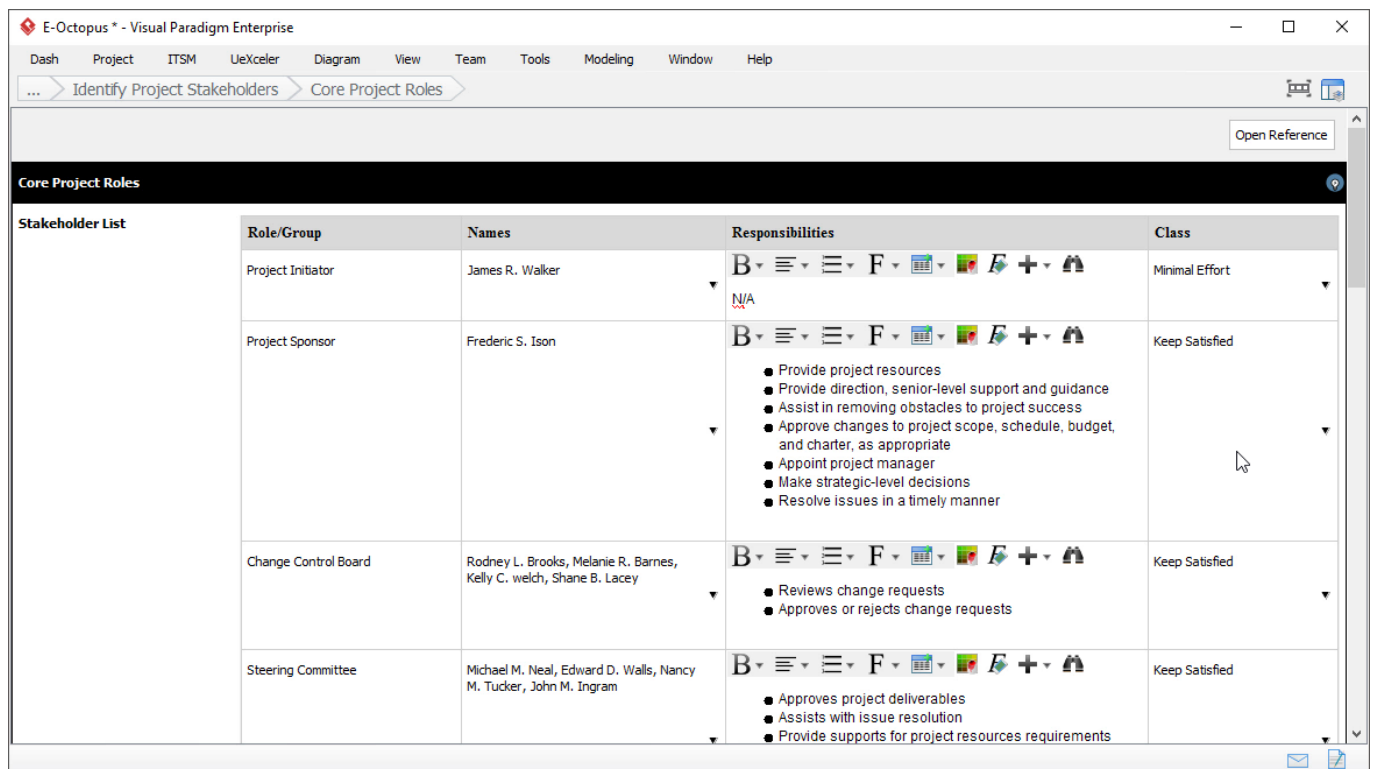
Provide a list of project management milestones and deliverables.



Activity 9: Identify Project Stakeholders

Describe the core roles and their responsibilities

The roles and responsibilities of project team members and other stakeholders must be clearly defined in any project. In this step, you are required to identify the core stakeholder roles of the project. Examples of core roles include: Project Manager, System Developer and Business Analyst.



The screenshot shows the 'E-Octopus - Visual Paradigm Enterprise' application window. The 'Identify Project Stakeholders' and 'Core Project Roles' tabs are active. A table titled 'Core Project Roles' is displayed, listing various stakeholder roles and their responsibilities.

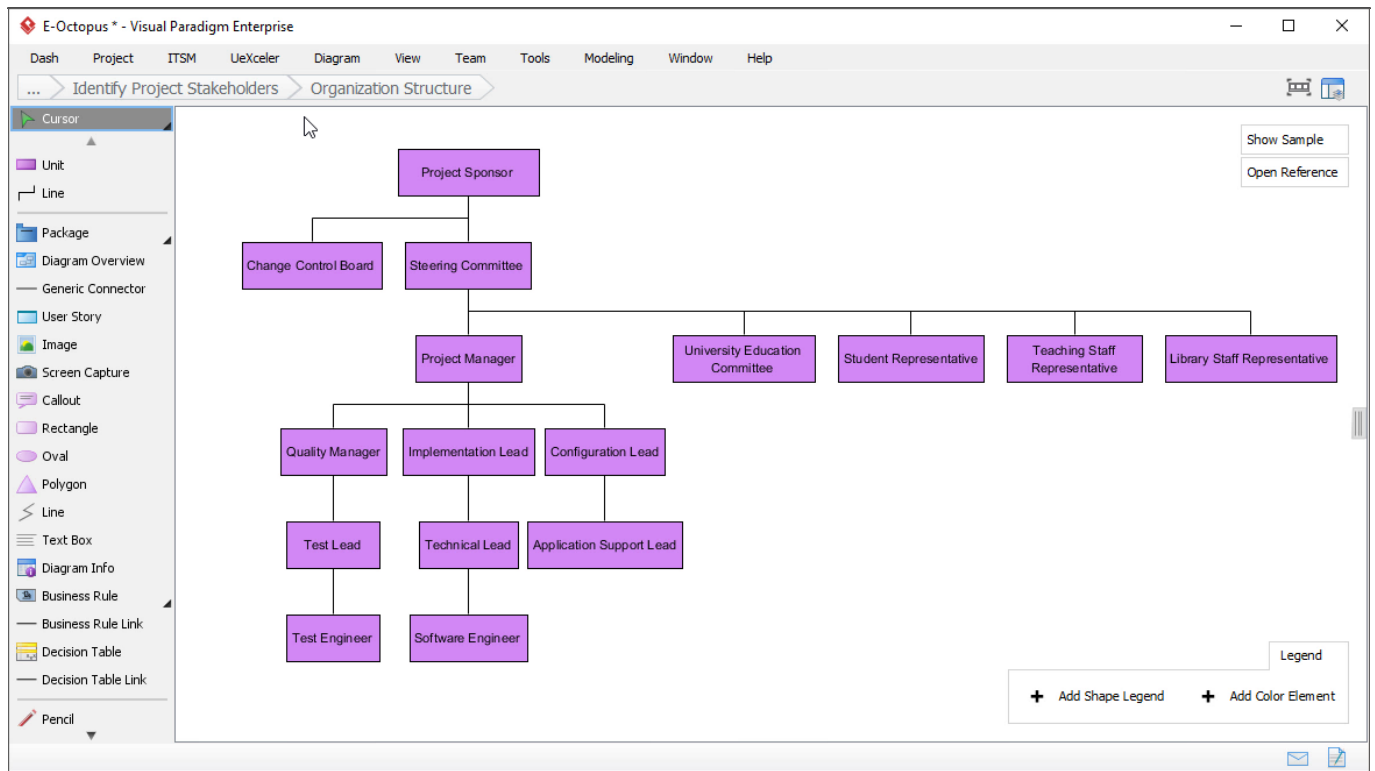
Stakeholder List	Role/Group	Names	Responsibilities	Class
	Project Initiator	James R. Walker	N/A	Minimal Effort
	Project Sponsor	Frederic S. Ison	<ul style="list-style-type: none"> Provide project resources Provide direction, senior-level support and guidance Assist in removing obstacles to project success Approve changes to project scope, schedule, budget, and charter, as appropriate Appoint project manager Make strategic-level decisions Resolve issues in a timely manner 	Keep Satisfied
	Change Control Board	Rodney L. Brooks, Melanie R. Barnes, Kelly C. Welch, Shane B. Lacey	<ul style="list-style-type: none"> Reviews change requests Approves or rejects change requests 	Keep Satisfied
	Steering Committee	Michael M. Neal, Edward D. Walls, Nancy M. Tucker, John M. Ingram	<ul style="list-style-type: none"> Approves project deliverables Assists with issue resolution Provide supports for project resources requirements 	Keep Satisfied

Enter the contact information for each stakeholder

Identify and enter the contact information for each stakeholder, which includes the address, mobile phone number and email address.

Draw a project organization chart

Describe how the project organization is to be structured, using an [organization chart](#).



Activity 10: Identify Resource Requirements

Identify the resources that are required to complete the project. Include the amount and the expected source that provides the resource(s).

Activity 11: Understand Project Management Repository

Understand Project Management Repository

Project Management Repository is a holding area for all project management resources (e.g. documents, deliverables, and references) produced and required during project life cycle. This activity requires the project team to understand how to use the Project Management Repository in managing resources.

Open the Project Management Repository under the **ITSM** menu in the application toolbar (or you can open it from the **Perform Action** area for now). To store files in Project Management Repository, drag the files you want to store into the appropriate drawer. For example, you may drag procurement documents (e.g. signed contracts, purchase orders, statements of work) into the corresponding drawers under the [cabinet Procurement Documents](#).

Project Management Repository

Project Management Documents

Identification

Initiation

Planning

Execution and Control

Closeout

Procurement Documents

Signed Contracts

Purchase Orders

Statements of Work

PDF



[Link](#)