

PROJECT CHARTER

Project Title

AI-Based Document Analysis & Reporting System

(Project Execution Case Study)

Project Owner

Sugnik Tarafder

Role: Project Coordinator / Associate Project Manager

Execution Type: Independently executed project (individual case study)

1. Project Background

Organizations generate large volumes of business documents such as reports, invoices, compliance files, and operational summaries on a daily basis. Manual analysis of these documents is time-consuming, inconsistent, and delays decision-making. There is a need for a centralized system that can automatically analyze documents, identify key insights, highlight risks, and generate executive-ready reports using AI-driven techniques.

This project was initiated as an independent project execution case study to design and deliver an AI-enabled internal business intelligence system that demonstrates real-world project management practices, delivery planning, and execution control.

2. Project Objective

The primary objective of this project is to design and deliver an AI-based document analysis and reporting system that can process business documents and generate structured daily and weekly intelligence reports to support faster and more informed decision-making.

3. Project Goals

- Automate analysis of business documents using AI
- Reduce manual effort required for document review
- Generate daily executive summaries with key insights
- Identify risks, sentiment, and action items automatically
- Provide weekly consolidated reports for strategic planning

- Demonstrate end-to-end project execution and delivery practices
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4. Project Scope

In Scope

- Document upload and preprocessing (PDF, Excel, CSV, Text)
- AI-based document analysis and summarization
- Risk classification and sentiment analysis
- Daily and weekly report generation
- Analytics dashboard and visualizations
- Data export functionality (CSV, JSON)
- Project documentation and execution tracking

Out of Scope

- Training custom machine learning models
 - Production-grade deployment on cloud infrastructure
 - Mobile application development
 - Real-time integrations with enterprise systems
 - Advanced user authentication and access control
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5. Key Stakeholders

Stakeholder	Responsibility
Project Owner	Planning, execution, tracking, delivery
End Users	Consume reports and insights
Business Decision Makers	Use outputs for planning and actions
AI System (Conceptual)	Automated document analysis
QA / Validation	Output verification and quality checks

Note: As this is an independent project, stakeholder roles are simulated for execution purposes.

6. High-Level Requirements

- Upload business documents securely
- Extract and analyze document content using AI
- Generate structured summaries and key points

- Classify risks and sentiment levels
 - Produce daily and weekly executive reports
 - Provide visual dashboards for insights
 - Enable data export for audit and record keeping
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7. Project Deliverables

- Functional AI-based document analysis system
 - Daily Business Intelligence Report
 - Weekly Executive Summary Report
 - Analytics dashboard with visualizations
 - Exportable analysis data
 - Complete project documentation set
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8. Project Timeline (High-Level)

Phase	Duration
Project Initiation	1 week
Requirement Analysis	1 week
System Design	1 week
Development & Configuration	3 weeks
Testing & Validation	1 week
Documentation & Closure	1 week

Total Duration: Approximately 8 weeks

9. Assumptions

- Sample business documents are available for testing
 - AI services are accessible via APIs
 - System is used for internal analysis and learning purposes
 - Scope remains limited to defined features
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10. Risks (High-Level)

- AI output accuracy may vary based on document quality
- API dependency availability
- Requirement changes during execution

- Performance limitations with large documents

Mitigation strategies will be defined in the Risk Register.

11. Success Criteria

- Successful analysis of uploaded documents
 - Accurate generation of summaries and reports
 - Identification of risks and sentiment
 - Stakeholder (simulated) acceptance during UAT
 - Completion within planned timeline
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12. Project Execution Statement

This project was independently planned and executed as an individual IT project execution case study. All activities including requirement analysis, planning, execution, testing, risk identification, and documentation were performed solely by the project owner to demonstrate practical project management and delivery capabilities.

13. Approval

This Project Charter formally authorizes the execution of the **AI-Based Document Analysis & Reporting System** project and confirms alignment with its objectives and scope.

Name	Role	Signature	Date
Sugnik Tarafder	Project Owner	Sugnik Tarafder	18 th January, 2026