**Project Charter**

**Project Name: Ride Request and Assignment System**

**Amendment History - Document Status (e.g. Draft, Final, Release #):**

*<Instructions: the amendment history should be completed when the document is finished and loaded to the myCourses dropbox. The first submission of any charter should be marked as version 1.0, the dates are when each version is submitted for review, modified by should contain the person(s) name that wrote/modified the document, and the revision section is only used in the future if revisions need to be made to the document.>*

| **Document Version #** | **Date** | **Modified By** | **Section, Page(s)and Text Revised** |
| --- | --- | --- | --- |
| 0.1 | Jan 22, 2025 | Everyone | Purpose, project description, objectives, high level requirements, milestones |
| 0.2 | Feb 5, 2025 | Everyone | Purpose, project description, objectives |

**Purpose**

[Project description](https://drive.google.com/file/d/1OVVkwDHAeQ_PlQkPogXpSOi0dwXN7OL5/view?usp=drive_link)

To create a Content Management System (CMS) for use in senior citizen driver appointments and coordination.

**High-Level Project Description**

The client-driver matching system helps organizations efficiently pair clients with volunteer drivers. Each organization will be separate from the others in terms of data, but will all use the same underlying system to handle all their day-to-day operations. This system should be able to keep track of drivers, their availability, appointments, clients, and more, as well as send emails to notify drivers of rides. The forms used to input this data should be dynamic and configurable by the organization. Each organization should be able to create custom roles with permissions assigned to each. Reports should be able to be generated based on data stored for that organization. All data should be able to be exported in a CSV format. Form inputs should have the ability to infer user input to speed up processing and reduce human error.

**Objectives**

* Reduce the time required for organization staff to maintain relevant information.
* Reduce opportunities for human error by introducing input validation, dropdown boxes, checkboxes, etc.
* Make it easier (as determined by user testing) for volunteers to be matched with clients.
* Make it easier (as determined by user testing) for organization staff to maintain the system and onboard new users via documentation.
* Make it easier (as determined by user testing) to view schedules and appointments.

**High Level Requirements**

* Must separate each transport agency’s data and CMS configuration.
* Must allow each transport agency to create and customize their own forms configurations.
* Must ensure that clients’ information (name, email, addresses, emergency contact, phone number, etc.) is stored securely.
* Make sure the system adjusts based on screen and device type.
* Must produce an easily understood calendar/schedule of volunteer availability (with filters?).
* Must generate customizable reports and encrypted confirmation emails.
* Must support logging of volunteers’ driven time and mileage accessible by permission, assignable by role.
* Must account for clients’ physical capabilities and limitations when scheduling rides.
* Must be able to schedule recurring appointments and provide flexible scheduling options for drivers.
* Must keep a status of all requested appointments (confirmed, cancelled, completed, in-progress, etc.)
* Must be able to export any and all data into a CSV format.

**Schedule Milestones of Key Deliverables**

| **Milestones** | **Start Date** | **Finish Date** |
| --- | --- | --- |
| Project Charter | 1/22/25 | 2/10/25 |
| Requirements Workshop Questions | 1/29/25 | 2/3/25 |
| Workshop: Requirement Gathering | 2/3/25 | 2/5/25 |
| Requirements List | 2/3/25 | 2/12/25 |
| User Stories or Use Cases | 2/10/25 | 2/19/25 |
| Gate Review 1 Presentations | 2/24/25 | 3/5/25 |
| Project Plan | 2/17/25 | 3/17/25 |
| Wireframes | 3/19/25 | 4/2/25 |
| Risk Register | 3/24/25 | 3/31/25 |
| System Architecture | 3/17/25 | 4/2/25 |
| Gate Review 2 Presentation | 3/26/25 | 4/9/25 |
| Peer Reviews | 4/21/25 | 4/23/25 |

**Resources**

**Budget:** No immediate costs or concrete budget are expected, but if an unavoidable cost for development or maintenance (e.g. email services, databases) arises, this cost will be discussed with the client.

**Personnel:**

* Organization Driver - most restricted role, restrictions and limitations are decided by roles and permissions.
* Organization Dispatcher - restrictions and limitations are decided by roles and permissions.
* Organization Coordinator - restrictions and limitations are decided by roles and permissions.
* Organization Admin - exclusive to a small number of people per organization, has all organization permissions.
* System admin - Be able to create, read, update and delete organizations.

**Procurement:.**

* Example driver’s schedule
* Example driver confirmation email

**Overall Project Risks**

| Category | Description |
| --- | --- |
| Business | * If an transport agency considering joining the system considers the features provided to be insufficient for their needs, they may decide that launching a competing platform would be more effective than joining |
| Technology | * If we use technologies and software that we are not familiar with, there is a risk in spending a lot of time learning and adapting to the new software and products. This could cause us to experience potential delays in creating what we need. Various software we are using could also not be working at a specific time due to scheduled maintenance or a cyber attack. |
| Organization | * A system administrator will be necessary for functions like adding new transport agencies to the system; while this will minimize the number of users with unrestricted access to end user data, this may be problematic if that system administrator is unavailable or becomes disinterested in maintaining the system |
| Management | * A lack of clear communication within the management team can lead to misunderstandings about the project’s needs and goals. These misunderstandings can cause confusion and uncertainty, which will likely result in a product that doesn’t meet expectations. |
| External | * Some group members may experience severe emergencies or unforeseen circumstances that can limit their availability to contribute to the project, which can delay project deliverables. |