



Project Charter

Reporting Pipelines Modernization

Health Authority



Manage Data 375

Business Projects-IT-Enabled

Analysis Phase

Manage Data 375

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Section 1. Charter Introduction

1.1 Document Change Control

Revision N u m b e r	Date of Issue	Author(s)	Brief Description of Change
1.0	Sep 27th, 2025	Brian Pham	Initial Draft
1.1	Oct 3rd, 2025	Justin Chanhom	Review + Approve Fixes, Finalization

1.2 Executive Summary

The project was initiated as part of a student project for the course CSC 375. The following content is based on the fictional scenario that we have created as part of the main group project for this class.

The Health Authority discovered a series of delays and incidents in reporting delivery. Due to the performance of the current system, the client provided a Request for Proposals (RFP). As the primary contracted resource for Application Management Services (AMS), we decided to provide a detailed system and solution analysis to the reporting pipeline.

During our initial assessment, we determined that the significant delay was caused by manual data entry and validation in Excel, data submission and quality assurance through back-and-forth emailing. This process is our modernization target, our project goal to deliver a full analysis, interactive report and present our potential solution to the client.

The targeted deliverables of this project are intended to be used by management teams of the Health Authority, to determine further implementation steps and budget management.

The following users would be impacted by our project:

- **Healthcare administrators:** logging patient data and information (primary users)
- **Financial analysts and accountants:** submit and review financial reports(primary users)
- **Data analysts and reporting staffs:** generate reports from financial and patient data (secondary users)
- **Management teams:** review reports created by analysts (secondary users)
- **External auditors/ regulatory bodies:** review reports created by analysts and raw data within data warehouse (secondary users)

Key deliverables and their respective deadlines are as following:

- Project Charter (3/10)
- Project Requirements (10/10)
- Project Use Cases (24/10)
- Data Model (31/11)
- Process Model (7/11)
- UI Prototype (14/11)
- Project Presentation (27/11)

We have also identified a series of risks associated with modernizing the reporting system, this is specified in section 2.6.1.

We estimated a project cost of \$19600 and a 25% contingency of \$4900 resulting in a total of \$24500 for the project.

1.3 Authorization

This project charter formally authorizes the existence of the project, *Manage Data 375 (MD375)*, and provides the project manager with the authority to apply organizational resources to project activities described herein. If there is a change in the project scope, the project charter will be updated and submitted for re-approval.

Brian Pham
Project Manager
MD375

Date: 10/3/25

Nitin Ruhil
Business Analyst
MD375

Date: 10/3/25

Yilun Shi
Project Review Committee
Health Authority

Date: 10/3/25

Justin Chanhom
Quality Assurance
Health Authority

Date: 10/3/25

Wenchu Kan
Documentation & Training Coordinator
MD375

Date: 10/3/25

Xianggyu Yang
Project Documentation Specialist
MD375

Date: 10/3/25

Section 2. Project Overview

2.1 Project Summary

Our project aims to address critical issues within the Health Authority's reporting workflow. The current process relies excessively on Excel and email for data entry and aggregation, resulting in inefficiency, frequent errors, chaotic version control, and posing compliance and information security risks. To address this, we plan to propose a modern solution during the analysis and design phase. This will incorporate web forms, validation rules, a centralized data warehouse, and integration with tools like Power BI. The goal is to achieve standardized, automated, and real-time data processing, thereby improving collaboration efficiency, enhancing data security and compliance, and reducing manual workload. Primary beneficiaries include administrative staff, financial and data analysts, management teams, and external auditors/regulatory bodies. This project is expected to deliver a clear design blueprint to facilitate the Health Authority's transition from manual reporting to an efficient, secure, and compliant modern system.

2.1.1 Project Goals, Business Outcomes and Objectives

N o.	Goals	Objectives	Business Outcomes
1	Enhance efficiency in data collection and reporting	Implement a centralized webform-based system to replace Excel spreadsheets	Data entry time reduced by 40% within the first 6 months of implementation
2	Improve accuracy and consistency of organizational data	Standardize data fields and validation rules across all departments	Error rates in submitted reports drop by at least 30% compared to baseline
3	Enable real-time access to operational data	Develop dashboards and automated reporting functions for key stakeholders	Decision-making cycle time shortened by 25% through faster access to accurate reports
4	Strengthen collaboration and reduce version control issues	Provide secure, multi-user access with role-based permissions	At least 80% of staff report improved collaboration in post-implementation survey
5	Support evidence-based decision making	Integrate analytics features to track trends and generate insights	Quarterly strategic reports incorporate system-generated analytics 100% of the time

2.1.2 Project Scope

2.1.3 Scope Definition

This project aims to deliver a detailed analysis of the current reporting pipeline, determining the inefficiencies with the current reporting system. The team will iterate upon this assessment to document requirements, define use cases, and design data and process models that demonstrate how a modernized solution can address these issues. To also support this analysis, the team will develop a User Interface (UI) prototype that showcases the possible solution, resulting in a cumulative report and presentation. The deliverables would provide the Health Authority with a clear picture of both the problem and the solution, and help guide implementation and budgetary decisions.

2.1.4 Boundaries

Activities In Scope	Activities Out of Scope
1. The following documentations will be developed: Project Charter, Requirements Document, Use Cases Document, Data Model Document, Process Model Document, UI Prototype	1. Implementation of the system proposed (either exploratory or Minimum Viable Product)
2. Extensive analysis of the current system and determining the inefficiencies causing delay in reporting	
3. Extensive interviews with the Health Authority to help determine the inefficiencies causing delay in reporting	
4. User Experience analysis with Health Authority to develop UI Prototype	

The intention of the project is to deliver a cumulative report and presentation, not a full implementation of the project. Documentation and UI artifacts are expected, implementation deliverables such as code should not be expected of the project.

2.2 Milestones

Project Milestone	Description	Expected Date
Project Charter Approval	Confirm scope, objectives, and roles for hospital reporting modernization; project officially starts	2025-11-03
Requirements Document Completion	Define needs for patient data entry, financial reports, and data warehouse integration	2025-11-10
Use Case Review	Approve core use cases for hospital admins, finance staff, analysts, and auditors	2025-11-17
Data & Process Models Finalization	Complete models of patient and financial data flows to support reporting	2025-11-24
Final Presentation	Deliver full design blueprint and UI prototype for hospital reporting modernization	2025-12-05

2.3 Deliverables

Project Deliverable 1: Project Charter (this document)	
Stakeholder:	Health Authority Management Team
Description:	A high-level document outlining the project's purpose, objectives, scope, stakeholders, risks, and constraints. It acts as the formal agreement to initiate the project.
Acceptance Criteria:	<ul style="list-style-type: none"> • Defines clear project objectives and measurable success criteria. • Identifies all primary stakeholders and their roles. • Outlines project scope, assumptions, and constraints. • Includes timeline overview and key milestones.
Due Date:	October 3rd, 2025
Project Deliverable 2: Requirements Document	
Stakeholder:	Health Authority management team, Health Authority healthcare administrators team.
Description:	A detailed specification of functional and non-functional requirements, ensuring alignment with stakeholder needs and system goals.
Acceptance Criteria:	<ul style="list-style-type: none"> • Requirements are written in clear, unambiguous language. • Each requirement is testable and measurable. • Requirements are prioritised (e.g., Must/Should/Could). • Traceability matrix is established (linking requirements to objectives/use cases). • Reviewed and validated with stakeholders for completeness.
Due Date:	October 10th, 2025
Project Deliverable 3: Project Use Cases	
Stakeholder:	Health Authority management team, Health Authority healthcare administrators team, Health Authority financial analysts and accountants team.
Description:	A collection of use case diagrams and narratives describing system interactions between users and the system.
Acceptance Criteria:	<ul style="list-style-type: none"> • Includes a comprehensive set of use cases covering all major user interactions. • Each use case has a clear title, actors, preconditions, steps, and postconditions. • Includes both normal flow and alternate/exception flows. • Use case diagrams are consistent with textual descriptions. • Reviewed and validated with stakeholders for completeness.
Due Date:	October 24th, 2025
Project Deliverable 4: Data Model	
Stakeholder:	Health Authority management team, Health Authority data analysts and reporting staffs team.
Description:	An entity-relationship (ER) diagram or equivalent schema capturing the system's data structure, relationships, and constraints.
Acceptance Criteria:	<ul style="list-style-type: none"> • Accurately represents all entities, attributes, and relationships. • Keys (primary, foreign) are defined correctly. • Aligns with requirements and use cases. • Reviewed and validated with stakeholders for completeness.
Due Date:	October 31st, 2025
Project Deliverable 5: Process Model	
Stakeholder:	Health Authority management team, Health Authority healthcare administrators team, Health Authority financial analysts and accountants team.

Description:	A diagrammatic and textual representation of the business processes/workflows supported by the system.
Acceptance Criteria:	<ul style="list-style-type: none"> ● Process flow diagrams (e.g., BPMN or UML activity diagrams) are included. ● Captures main processes, decision points, inputs, and outputs. ● Processes align with requirements and stakeholder expectations. ● Models are consistent, logical, and unambiguous. ● Reviewed and validated with stakeholders for completeness.
Due Date:	November 7th, 2025
Project Deliverable 6: UI Prototype	
Stakeholder:	Health Authority management team, Health Authority healthcare administrators team, Health Authority financial analysts and accountants team, Health Authority data analysts and reporting staffs team.
Description:	A low-to-mid fidelity prototype demonstrating user interface design, navigation, and core system interactions.
Acceptance Criteria:	<ul style="list-style-type: none"> ● Covers all key system screens identified in requirements. ● Demonstrates logical navigation and consistent design patterns. ● Provides basic interactivity (clickable prototype). ● Adheres to usability and accessibility standards. ● Reviewed with stakeholders, feedback incorporated.
Due Date:	November 14th, 2025
Project Deliverable 7: Project Presentation	
Stakeholder:	Health Authority management team, Health Authority healthcare administrators team, Health Authority financial analysts and accountants team, Health Authority data analysts and reporting staffs team.
Description:	A final presentation summarising the project objectives, process, deliverables, and outcomes for stakeholders or evaluators.
Acceptance Criteria:	<ul style="list-style-type: none"> ● Includes introduction, methodology, deliverables, and conclusions. ● Clear visuals (slides/diagrams) supporting the narrative. ● Demonstrates alignment between charter, requirements, models, and prototype. ● Engages the audience and addresses potential questions.
Due Date:	November 27th, 2025

2.4 Project Cost Estimate and Source of Funding

2.4.1 Project Cost Estimate

Type	Description	Estimated Cost (CAD)
Phase 1/ Deliverable - Analysis & Documentation		
Salary	PM, BA	\$9000
Professional Service	Consulting/Workshops	\$1500
Capital	Software licenses-collaboration tools	\$500
O&M	N/A	\$0
Ongoing cost	N/A	\$0
Other	Printing, meetings	\$300
Sub-Total		\$11300
Phase 2/ Deliverable - Design & Prototyping		
Salary	UI/UX, QA	\$6000
Professional Service	design/QA support	\$1000
Capital	Figma license, prototype hosting tools	\$500
O&M	Environment setup/testing	\$200
Ongoing cost	N/A	\$0
Other	Stakeholder workshops	\$600
Sub-Total		\$8300
Contingency		\$4900
Total		\$24500

2.4.2 Source of Funding

Funding for the Reporting Pipeline Modernization project will be provided through the Health Authority's operational budget for IT-enabled projects. This ensures that all activities related to analysis, requirements gathering, process and data modeling, and prototyping are fully supported.

1. **Operational Budget Allocation:** The Health Authority has committed internal funds to support project management, business analysis, technical modeling, and stakeholder engagement.
2. **In-Kind Human Resources:** The internal project team provides resources for the following project roles: Project Manager, Business Analyst, Technical Lead, UI/UX Designer, and Quality Assurance Tester. Their time is regarded as an equal contribution to professional services.

3. **IT Department Licensing and Tools:** To reduce extra capital expenses, the necessary tools (such as Figma, Lucidchart, and collaboration platforms) will be made available through current organizational licenses.
4. **Contingency Reserve:** To cover unanticipated analysis hours, stakeholder workshops, or additional prototyping requirements, a 25% contingency allowance is built into the budget.

2.5 Dependencies

Dependency Description	Critical Date	Contact
Before the user testing begins, it is necessary to complete the migration of historical data from Excel to the new system	October 15, 2025	Data Migration Manager (IT Department)
Before the system goes live, authentication and user access configuration must be completed	October 31, 2025	Head of Information Security Group
Before promoting the system, it is necessary to develop user training materials and seminar courses	November 10, 2025	Training and Change Management Coordinator
The project needs to be integrated with existing departmental reporting tools	November 20, 2025	System Integration Manager
Must obtain final approval and compliance review from the Data Governance Committee	December 1st, 2025	Compliance Manager

2.6 Project Risks, Assumptions, and Constraints

No.	Risk Description	Probability (H/M/L)	Impact (H/M/L)	Risk Management Plan	OPI
1	Resistance to Change: Current system's users are resistant to change and reject new approaches due to disruptions to their current workflow.	M	H	Provide training and user support. Developing an intuitive system	Project Manager & Dept. lead

No.	Risk Description	Probability (H/M/L)	Impact (H/M/L)	Risk Management Plan	OPI
2	Data Migration/Accuracy issues: Legacy data must be migrated to new platform, Data accuracy is reduced due to new platform adoption.: Legacy data must be migrated to new platform, Data accuracy is reduced due to new platform adoption.	M	H	Test the new system with sample data and run it in parallel with the old process at first.	Project Manager and data team
3	Integration/ Technical Challenges: End users face technical difficulties in using the application.	M	M	Plan for technical testing early	Project manager and IT team
4	Timeline Delays	M	M	Set a realistic timeline with some buffer time for unexpected issues	Project manager

2.6.1 Assumptions

The following assumptions are being made for planning this project. We consider these conditions to be true for now, and the plan relies on them. (If any assumption turns out to be wrong, it could become a risk for the project):

No.	Assumptions
1	Stakeholder Participation - We assume that key stakeholders and end users will be willing and available to take part in the project.
2	Tool Access - We assume the project team will have access to all necessary tools and technology.
3	System Compatibility - we expect that we can integrate the new forms and Power BI dashboards into our current environment successfully.
4	Management Support - We assume that the organization's leadership will continue to support this project.
5	Data Availability - We assume that all necessary data needed for the new reporting pipeline is readily available and of good quality.

2.6.2 Constraints

The project must be carried out within the following real-world constraints. These are conditions we cannot change and have to plan around:

No.	Category	Constraints
1	Schedule	There is a firm deadline for this project. The new reporting pipeline must be fully implemented by the target date.
2	Budget	The project has a fixed budget and cannot exceed the allocated funds. All work must be done within the approved budget limits.
3	Technical Environment	We are limited to using approved technologies and existing infrastructure. The solution must fit within our current IT environment.
4	Privacy and Security	All data handling must comply with data privacy regulations and our security policies. This constraint means the new system must protect sensitive information and store it in approved locations.
5	Ongoing Operations	The current reporting process cannot be disrupted during the project. We must implement changes in a way that daily operational reporting continues.

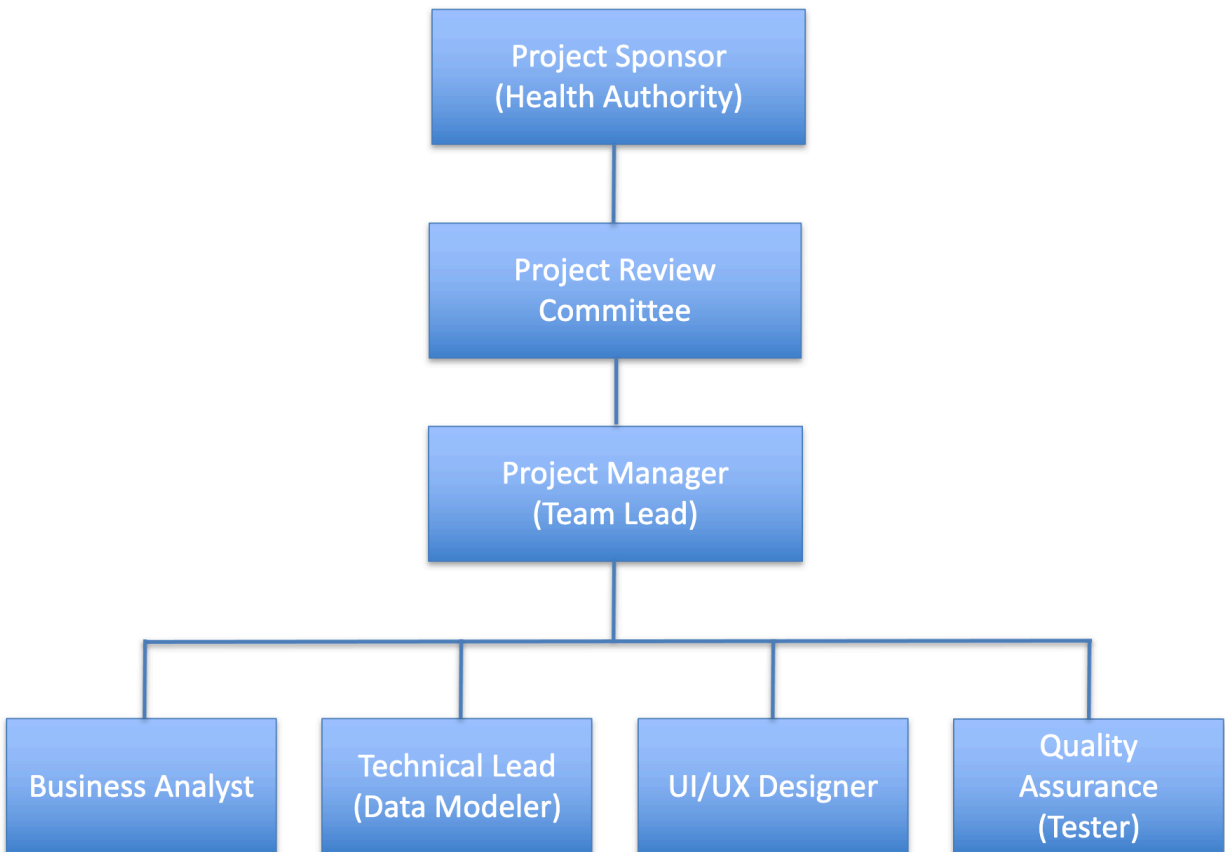
Section 3. Project Organization

3.1 Project Governance

The project will be governed through a hierarchical governance structure as following:

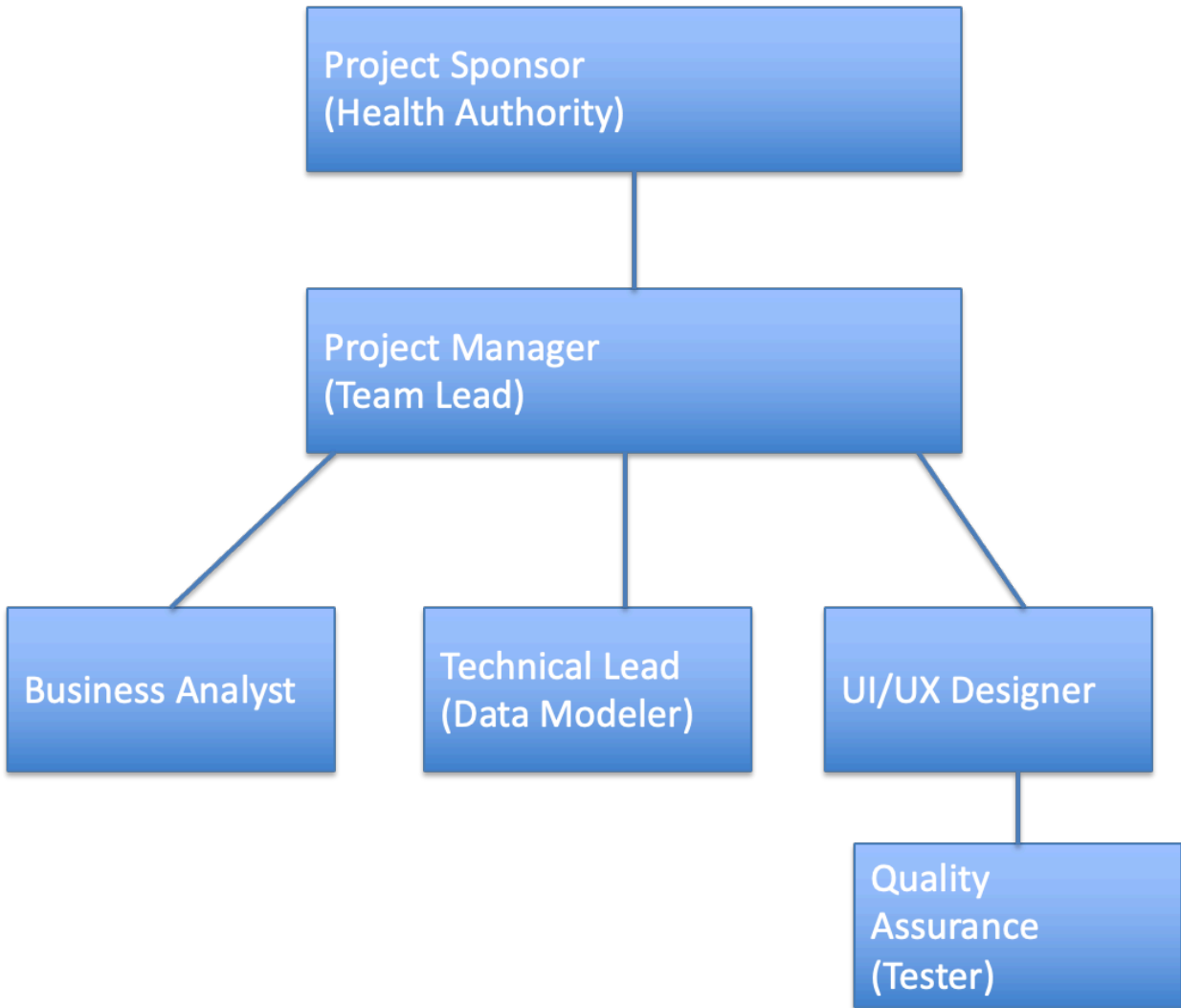
1. **Deliverable approvals:** requirements, models, prototypes are reviewed by the project review committee and formally approved by the project sponsor.
2. **Major changes in budget, schedule or scope:** This is escalated by the project manager and decided by the project sponsor.

3. **Routine project decisions:** Task assignments, minor adjustments are made by the project manager.



Project Team Structure

The project team is organized to ensure clear responsibilities and efficient collaboration. Each member has a defined role, and the team reports to the Project Manager, who is responsible for coordinating tasks and ensuring milestones are met.



3.2 Roles and Responsibilities

Project Role	Responsibilities	Assigned to
Project Manager	Tasks and risk management, making sure the project is on track and adhere to requested budget and deadlines. Contribute to documentation efforts while leading client interactions.	Brian Pham

Project Role	Responsibilities	Assigned to
Business Analyst	Writing requirements, checking risks, and helping the team design a better reporting system for the project.	Nitin Ruhil
Project Review Committee	Reviewing deliverables and providing guidance on issues and changes	Yilun Shi
Documentation & Training Coordinator	Responsible for developing the webform-based reporting system, migrating data from Excel, building integrations, implementing user authentication.	Wenchu Kan
Quality Assurance	Responsible for testing the functionality and performance of the reporting system by employing automated testing and user trials.	Justin Chanhom
Project Documentation Specialist	Write and maintain project summary and milestone documentation. Ensure that the documentation is clear, comprehensive, and aligned with project scope	Xiangyu Yang

3.3 Project Facilities and Resources

The project will require a dedicated development environment for continuous development, testing and implementation. Git will be used to host the project repository, with Docker and Kubernetes for containerization and automated testing tools. As for deployment of the project, it will be hosted on a secure server cluster provided by the sponsor organization.

Section 4. Project References

More information concerning this project can be found in the following documents:

Document Title	Version #	Date	Author and Organization	Location (link or path)
Project Charter Guide	1D	3-Oct-2025	Health Authority	Y:\CIOB\Template

Section 5. Glossary and Acronyms

Term	Definition
Primary Users	Core audience of a product
Secondary Users	Occasional users or users who interacts with the system through an intermediary
Excel	Software program by Microsoft that uses spreadsheets to organize numbers and data with formulas and functions
Central Data Warehouse	Cloud-based or physical storage server containing data from multiple sources
PowerBI	Software program by Microsoft that uses data sources to create interactive reports (tables, charts)
Webform	Interactive forms that are accessible through the internet.
Risk	Something that could go wrong in the project, which may cause delays, extra cost, or poor results.
Assumption	A condition we believe to be true when planning .
Constraint	A limit or rule the project must follow, such as deadlines, budgets, or privacy laws.
Mitigation	Actions taken to reduce the chance of a risk happening or to lessen its impact.
Stakeholders	People or Groups affected by the project.
Deliverables	The final products the project team must provide, like reports, models and presentation.
Data Migration	The process of moving data from the old Excel to the new reporting system.
Acronym	Name in Full
RPM	Reporting Pipelines Modernization
MD375	Manage Data 375 (Project working title)
UI	User Interface
RFP	Request for Proposals
AMS	Application Management Services