Project Charter

|  |  |
| --- | --- |
| **Project Title:** ACH Case Tracking Phase I | |
| **Start Date:** 01/20/2016 | **End Date:** 05/02/2016 |
| **Project Manager:** Steven Evans | |
| **Project Sponsor:** Commerce Bank | |
| **Customer:** Frank, Jeremy Best, Paul Perry | |
| **Users:** Angie | |
| **Stakeholders and Expectations:**  Team: *Gain real-world experience developing a software product as part of a team using a software development methodology.*  Professor Burris: *Showcase the level of excellence characteristic of students completing the UMKC CS & IT programs.* | |
| **Purpose (Problem or opportunity addressed by the project)**: Until now all case management has been handled manually through Excel spreadsheets. This process is inefficient, unsecured and difficult to maintain. This makes it difficult to process requests from government municipalities. The extra time required for each request and the liability of allowing deceased persons to receive government funds results in monetary loss for Commerce Bank. | |
| **Goals and Objectives**: Our product will allow automation of some file processing, add automatic auditing and make cases visible. This product will make the case management process more effective and result in saved costs for Commerce Bank. | |
| **Schedule Information (Major milestones and deliverables)**:  02/05/2016 - Requirements Meeting with Commerce  02/10/2016 - Product Backlog & Use Cases (Iteration 1) Due  02/17/2016 - Requirements Document Completed  02/29/2016 - Technical Prototype Due  03/21/2016 - Project Status Presentation  03/25/2016 - Sprint Review with Commerce  05/06/2016 - Final Presentation | |
| **Financial Information (Cost estimate and budget information)**:  440 hours for a team of four developers (Estimated). | |
| **Project Priorities and degrees of freedom:** Ability to choose technical aspects of the project such as language, frameworks, database, libraries, etc. as well as user interface design. | |
| **Approach:** Product will be developed iteratively and incrementally with feedback given between iterations. Tasks will be coordinated in such a way that no team member will be assigned tasks that are dependent on another team member. | |
| **Constraints**: Open source, non-hosted libraries/framework | |
| **Assumptions**: Requirements may change | |
| **Success Criteria**:The product contains all desired functionality and can be easily integrated with Commerce Bank’s existing systems. | |
| **Scope**: The product will allow E.B.S. and call-center users to manually create cases or have them auto-generated from data files. All users can search through existing cases and view information. E.B.S. users will have the ability to update the status of existing cases as well as close cases. Admin users have the ability to configure and adjust SLA for cases but cannot edit cases. All cases should be closed within 35 days. | |
| **Risks and obstacles to success**: Technical issues; working in a team efficiently | |
| **Signatures**  **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Project Manager**  **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Project Sponsor**  **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Customer**  **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Technical Lead** | |