ECS Project Charter

Section 1. Charter Introduction

Revision Number	Date of Issue	Author(s)	Brief Description of Change
1.0	2026-01-07	Max and Caleb	Creation of the document.
1.1	2026-01-17	Max and Caleb	Additions to milestones and deliverables

1.1 Authorization

This Project Charter, for the creation of an Employee Claims System web application has been reviewed in full and approved by the following:

Signature____

Date ___________________________
Weyland Yutani

Signature____

Date ___________________________
Sean Morrow

Section 2. Project Overview

2.1 Project summary

- The purpose of the project is to create a Employee Claims System (ECS) for our client, Weyland Yutani
- The ECS must work on all modern browsers, including Desktop, Tablet and Mobile devices.
- The ECS will support an employee role. Employees will only be able to submit and view their own claims.
- The ECS will support an admin role. Admins will have the ability to review claims.

2.2 Project scope

2.2.1 Scope definition

In Scope:

- A web interface for admins
- A web interface for employees
- The ability to submit claims
- The ability for admins to manage claims
- A MongoDB database using Atlas for storing claim and login information
- A web app deployed on Vercel

Out of Scope:

- Employee and admin self registration
- Email alerts
- Push notifications

2.3 Milestones

Wireframe & UX Design Approved

- Core application pages are wireframed with strong emphasis on UX and usability
- Includes employee flow, admin dashboard, and claims workflow
- **Target date:** Jan 14th, 2026

Core Frontend & Authentication Complete

- Frontend pages implemented
- Login system implemented using BetterAuth
- No public registration pages (admins and employees created by admin only)
- **Target date:** Jan 30nd, 2026

First Successful Deploy on Vercel

- Application successfully deployed to Vercel
- App functions without critical bugs in production
- Pages load within 3 seconds
- **Target date:** Feb 6th, 2026

Claims Management Functional

- Employees can submit and view their own claims
- Claims have three states: pending, approved, denied
- Claims are immutable (no edits or deletes)
- **Target date:** Feb 27th, 2026

Admin Dashboard & Reporting Complete

- Admins can manage employees, claims, and categories
- Admins can approve/deny claims with comments
- Reporting available with charts and filters
- **Target date:** March 13th, 2026

2.4 Deliverables

Wireframes Completed

- Wireframes for all application pages completed
- Includes employee views, admin views, and claims flow

- **Acceptance criteria:** All required pages are wireframed and approved
- **Date:** Jan 14th, 2026

Frontend Pages Implemented

- Employee dashboard
- Admin dashboard
- Claims list and submission pages
- Login page
- **Acceptance criteria:** Pages render correctly and follow wireframes
- **Date:** Jan 21th, 2026

Database Deployed

- MongoDB database deployed using MongoDB Atlas
- Schemas created for users, claims, categories, and comments
- **Acceptance criteria:** Database is reachable and persists data
- **Date:** Jan 28th, 2026

Authentication System Implemented

- Login system implemented using BetterAuth
- Role-based access (admin vs employee)
- No registration pages available publicly
- **Acceptance criteria:** Users can log in and are routed correctly
- **Date:** Jan 30th, 2026

First Successful Production Deployment

- Application deployed to Vercel
- All core features functional in production
- **Acceptance criteria:** No critical deployment or runtime errors
- **Date:** Feb 6th, 2026

Claim Database & Category Setup

- Default categories created (food, travel, lodging, medical)
- Travel and medical categories support extra fields
- Admins can create/delete non-default categories
- **Acceptance criteria:** Categories persist and validate correctly
- **Date:** Jan 14th, 2026

Claims Viewable on Frontend

- Employees can see only their own claims
- Admins can see all claims
- Claims sorted with most recent at the top
- **Acceptance criteria:** Correct data visibility based on role
- **Date:** Jan 21st, 2026

Claim Submission Implemented

- Employees and admins can submit claims
- Required fields enforced (date, category, description, amount, receipt image)
- Receipt upload supports JPEG and PNG
- **Acceptance criteria:** Valid claims are stored and visible
- **Date:** Jan 28th, 2026

Claim Status Workflow Implemented

- Claims default to “pending”
- Admins can approve or deny claims
- Admin comments visible to employees
- Denied claims cannot be edited and require resubmission
- **Acceptance criteria:** Status transitions function correctly
- **Date:** Feb 4th, 2026

Filtering & Reporting Features

- Filter claims by status (pending, approved, denied)
- Filter claims by date range
- Display amount spent per category
- Graph visualization (bar or pie chart)
- **Acceptance criteria:** Filters and charts update correctly
- **Date:** Feb 27th, 2026

Employee & Admin Management

- Admins can create and delete employee accounts
- Admins can submit claims on behalf of employees
- **Acceptance criteria:** Role permissions enforced correctly
- **Date:** March 13th, 2026

Export & Performance Enhancements (Nice to Have)

- Export reports as CSV or PDF
- Optional camera upload for receipts
- Performance optimized to load pages within 3 seconds
- **Acceptance criteria:** Export works and performance targets met
- **Date:** March 30th, 2026

2.5 Project cost estimate and sources of funding

	Hours	Wage	Total Cost	
Max	260	$20/h	$5200	
Caleb	260	$20/h	$5200	
Totals	520	$40/h	$10,400	

2.6 Risks and Assumptions

- Scope creep – If we don't follow our scope we could end up over our heads in terms of application functionality.
- Burnout – If the workload isn't divided up properly, it could lead to one of us becoming overburdened and burnt out.
- Lack of communication – Communication is key to assure that we are on the same page during the development of the application.

Section 3. Project Organization

3.1 Stakeholders

Stakeholder	**Name**
Project Sponsor	Weyland Yutani
Client / Customer	Weyland Yutani
End Users	Weyland Yutani's employees and admins
Project Team	Max and Caleb
Supporting Staff	Sean Morrow

3.2 Roles and responsibilities

[In the following section you outline the roles the team members will play in the project development. Below are some examples, but note that they might not apply to your project, and others might have to be added]

Role	**Description**	**Name/Title**
Developer	Front End Development	Caleb, Max
Developer	Database and back end development	Caleb, Max
Developer	User interface design and back end development	Caleb, Max
Testing	Contribute opinion, testing, knowledge and other personal resources	Caleb, Max, Sean
Project Manager	Upkeep direction, documentation, and organization	Max
Subject Matter Expert	Broad knowledge of implementation and development	Sean

3.3 Project facilities and resources

[Here is where you list any sort of hardware, labs, software, etc. that would be needed for the completion of the project]

- Vscode – Designated IDE
- Github – For git control collaboration
- Discord – Team Communication

Section 4. Glossary and Acronyms

Define all terms and acronyms required to interpret the project charter properly.

ECS	Employee Claim System
IDE	Integrated development environment