WASHINGTON
COURTS

ADMINISTRATIVE OFFICE OF COURTS

ISD PMO Starter Kit

Functional Requirements Specifications

VERSION 1.0

STATE OF WASHINGTON
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Document History

Author	Version	Date	Comments
Chad Stoker	1.0	11.17.09	Baseline document with core feature and function descriptions

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1. Introduction

IT projects undertaken using a proven project management methodology carry less risk and a greater chance of success than unstructured projects. An organization (of any size) needs a formal project management methodology when it seeks to have consistent, predictable results and a process that is open to improvement. In the absence of a stable and constantly maturing process for IT project delivery, there is no possibility that project management will be consistently improved because improvements are random and non-repeatable.

Recognizing the need to improve the management of IT projects initiated to support the Washington State Judicial Information System (JIS), the Administrative Office of the Courts' (AOC), Information Services Division (ISD) implemented a 2007 initiative to establish a centralized Project Management Office (PMO) to coordinate the development of the ISD's project management capabilities. The PMO by design is responsible for developing and providing a consistent project management methodology and standardized project management tools. It is also responsible for institutionalizing a project governance process to ensure uniform oversight of all current and future IT project initiatives.

The purpose of this document is to explain the detail features, functions, and required capabilities of the PMO Starter Kit necessary to enable and support its defined framework strategy and methodology for defining, managing, and delivering technology products and services.

1.1. Intended Audience

The following groups should find this document useful:

- Staff who maintain or update the Project Starter-Kit Application and supporting documentation.
- Staff/Vendors responsible for reviewing a base-line reference with regard to future development efforts.

1.2. Product Scope

There are multiple phases to the project at-large, and this document is directly related only to the first of four phases. The "Project Initiation" phase. Currently, the project planning, project execution, and project close-out phases are out-of-scope with respect to this document.

1.3. References

Please refer to the ISD PMO Enterprise Implementation notebook for references relating to the purpose and overall goals of this effort.

- ISD PMO – Framework strategy
- ISD PMO – Methodology and Process (V.05L)
- ISD PMO – Planning Documents (NCO, Feasibility Study, Project Charter)

2. Overall Description

2.1. Product Perspective

This product will be developed in the context of implementing a centralized PMO portal. Specifically, the product will provide automation for workflows and processes that make up the standard project methodology at AOC. It will also provide a standard set of information to be reported on in order to provide project oversight for the PMO and other high-level management.

2.2. User Classes and Characteristics

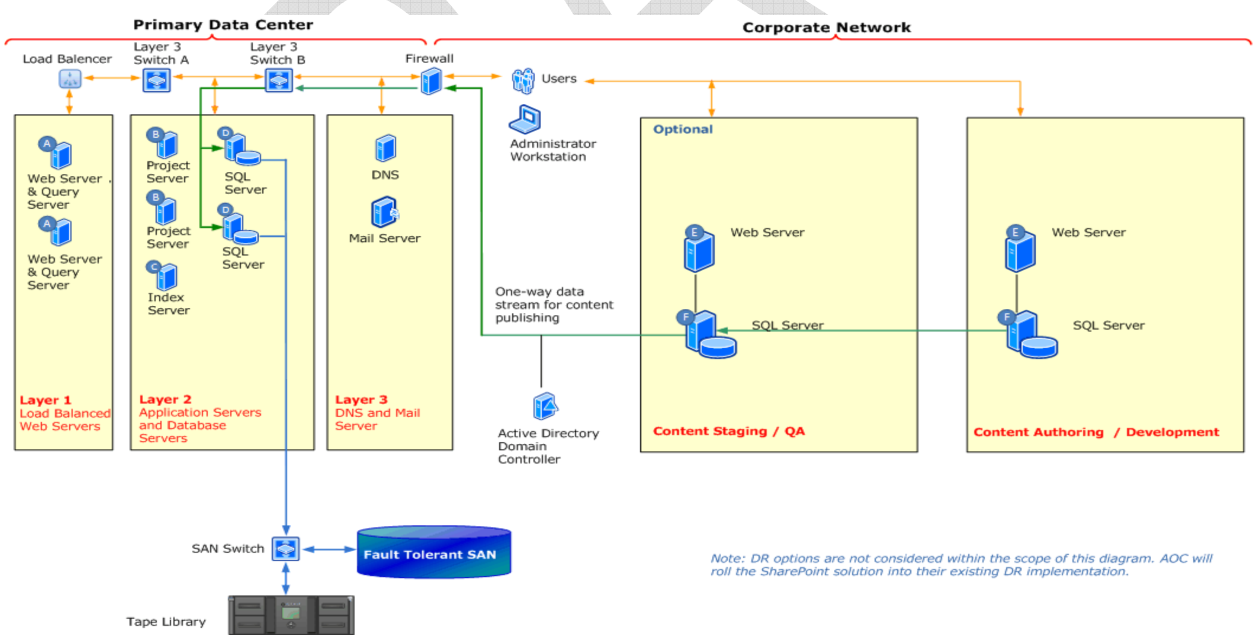
User Classes	Primary Role
Project Management Office	The project management office maintains the scoring standards, project templates, standardized methodology, and other standards for project initiation, planning, execution, and close-out. This user-class is responsible for providing the input for the NCO QA Checklist and the NCO Review documents. Additionally, they will identify Project Leads following Director approval of the NCO.
Project Initiator	The individual(s) responsible for coming up with a project concept. (This can be anyone including an external customer, an internal IT staff member, etc.) This user-class must create the NCO and submit it for review. This user-class must also create the Feasibility Document and submit it for review.
Project Sponsor	The individual or group responsible for sponsoring the project both financially and externally to other customers. This user-class will be assigned once the Project Initiator selects a “sponsor” for their proposed project. A “sponsor” is different from a “lead” in that a “sponsor” will typically be a judge, a court, or some type of customer that has a particular need. They are not the individual or group that is necessarily responsible for funding the project or managing the project directly.
Director	The AOC agency director responsible for the final approval and sign-off of any given project that is up for review. This user-class is responsible for the final review and approval of anything that has been reviewed and submitted for review by the Project Management Office user-class. Specifically, the user-class will review all NCO’s and NCO assessments, Feasibility Studies and Statements of Work, and final outcomes of the Project Initiation phase.

User Classes	Primary Role
Project Lead	The individual or group of individuals responsible for guiding the project through its various phases of execution. This user-class is responsible for guiding the project to its eventual completion. (If the project moves forward and is approved for the next phases of the PMO Project Methodology.) During the Project Initiation phase, this user-class will provide input for the feasibility study if necessary.
Developer	The individual or group responsible for developing the features and mechanisms to access those features within Sharepoint. (Or any other platform for that matter)
Systems Analyst	The individual or group responsible for evaluating systems, processes, and user expectations.

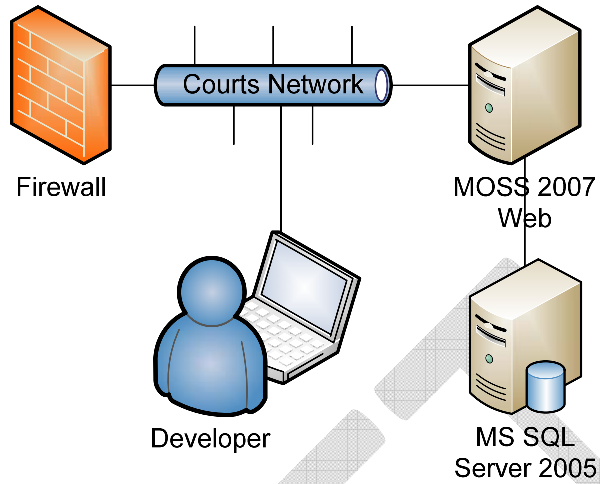
2.3. Operating Environment

2.3.1. Network Topology

Currently, there are 3 environments that the PMO Sharepoint Portal is going to reside on. They include the Test, DEV, and Production environments respectively. The Production environment is configured as indicated in the figure below.



This is in contrast to the Test and DEV environments which consist of simple 2-tier installations of Sharepoint. A simple Web Server running Microsoft IIS leverages a basic Microsoft SQL Server back-end for all environments other than Production. Both the Test and DEV servers are running on the same physical hardware. The SQL Server environment in Test and DEV is running 2 named instances of Microsoft SQL Server 2005 to support the Web Sharepoint installations respectively.



2.3.2. Security Configuration

The Starter-Kit Sharepoint application depends on a complex combination of Windows Active Directory security, Sharepoint "Groups", Sharepoint "Users", and Sharepoint "User Attributes".

Currently, the requirements for Security configuration are unknown. There are specific actions that various roles will need to perform in order to work with the product being developed here. First we will list the roles, and then we will discuss the actions that are likely associated with these roles.

User Classes	Required Action Capability
Project Management Office	• Must be able to create an NCO Review Assessment, NCO QA Checklist, and a Feasibility QA Review and Assessment. • Must be able to view Sharepoint Lists that store the content • Must be able to assign a Project Lead to a project that makes it past the NCO review phase.
Project Initiator	• Must be able to create an NCO document and submit for approval. • Must be able to create a Feasibility Study and submit for approval.
Project Sponsor	• Must be notified of status of project upon approvals
Director	• Must have access to the NCOBatchDirectorReview page in what is currently the "Pages" list. • Must have sufficient permissions to view other aggregate view pages.
Project Lead	• Must be able to view Sharepoint Lists that store the content
Developer	• Must be able to use Sharepoint Designer to access ALL lists (including the Workflows) in the Sharepoint site. • Must have appropriate permissions to view Web Parts with Data Connections to SQL Server or the Sharepoint site itself. • Must have "Full" permission on the site at the root-level and also at the PMO site level.

User Classes	Required Action Capability
	• Must be included in what is currently the "Super Admin" group
System Analyst	• Must be able to use Sharepoint Designer to access ALL lists (including the Workflows) in the Sharepoint site. • Must have "Full" permission on the site at the root-level and also at the PMO site level. • Must be included in what is currently the "Super Admin" group

2.4. Design and Implementation Constraints

Currently, the Project Management Office has chosen to leverage Microsoft Sharepoint 2007 technologies for the implementation of their PMO Project Management Portal.

Constraint	Description
MS Sharepoint 2007	This platform was chosen because of its high level of customizability with little or no code generation and because of its tight integration with the Microsoft Office 2007 suite of applications. Additionally, MS Office Sharepoint Services are highly scalable and customizable from a network topology perspective. Deployment of certain components within customized Sharepoint applications is constrained by the design and inherent architecture of Sharepoint itself. Deployment of Workflows and other Sharepoint features must be addressed in a different manner than the deployment of simple site navigation, content, and document lists.
Internet Explorer 7.0+	Since Sharepoint has been chosen as the main platform for the entire solution being developed for this project, certain key features and functions that are common to the MS Office 2007 Web Forms Services do not perform as well on non Microsoft browser technologies. For this reason, it has been determined that Internet Explorer will be the only supported browser technology that this application will be able to support.
AOC Development Standards and Practices	The AOC Development Standards are to be implemented in full for any custom development that is to occur during this project. If necessary, development standards may be updated or enhanced to reflect the new technologies that may come into use during this project, however these updates must be verified and approved by the Enterprise Architecture group.
Throughput Processing Speeds	Because AOC expects to expose this project's resulting Sharepoint portal to external customers at some point, the speed with which data is returned and forms are submitted is important. As such, any design or architectural modifications and enhancements need to be made in this context. This is currently the reasoning behind the network topology and hardware infrastructure in the Production environment. It allows the IT Infrastructure staff the ability to add hardware as necessary to meet any increases in demand for the services that the PMO Portal will provide.
Data and System Interfaces	All interfaces developed for consumption by external applications must not slow down and adversely affect the performance of the PMO Sharepoint Portal.

2.5. User Documentation

Several project artifacts are to be delivered as a part of this release of the overall project. The artifacts to be delivered include:

Technical Specifications – (TBD)
Test Plans (w/ focus on User Acceptance Testing) – (TBD)
PMO Sharepoint Portal Users Guide – (TBD)
Service Level Agreement - (TBD)
Future Considerations – (TBD)

2.6. Assumptions and Dependencies

1) It is assumed that there will eventually be external users of the system. However, in its current state, the Project Management Office Starter-Kit will only be handling internal customers.

2) Future development will build off of what has currently been accomplished. It may not take exactly the same approach, but it will not re-create what is already present in a significant way.

3) This document is not intended to describe in great detail, exactly how content is stored, presented, configured, or otherwise manipulated. Instead, this document is intended to demonstrate what the User-Experience should feel like when navigating through the various phases of the Project Management workflow.

4) In its current state, the system does not inform the User (any user) where the project process actually is in the Workflow. This means that a User could go in and “re-score” an item even if that item is being move through the Feasibility process. It is ASSUMED that the User will not perform any actions out-of-order. Hopefully, there will eventually be an indicator provided that will show WHERE the process is in the Workflow so the Users will not inadvertently run into this problem.

3. System Features

This section will outline the various features that make up the product referred to as the PMO Starter Kit. It should describe descriptions and priorities for each of the features. Additionally, each Feature defined should defined stimulus/response sequences as well as functional requirements.

3.1. Feature: Logging In And First Look

3.1.1. Functional Description

Actors	Project Initiator, anyone with the responsibility of submitting a project concept for consideration
Description	The PMO Project Portal represents a new and formalized approach for

	tackling projects within AOC. In order to maintain the level of communication necessary to ensure user buy-in and approval, there must be a simple tutorial and explanation for the portal itself. Generally speaking, the Sharepoint Portal will provide this information somewhere on the main screen that users will commonly first see when they choose to use the application. The implementation and manifestation of this screen is not a top priority, but it must be in place before the system goes live for public use.
Priority	Low
Pre conditions	• User's identity has been authenticated • User is authorized to view site & page content via assigned Security Roles
Post conditions	• User is able to navigate freely on the site and perform any actions necessary to complete their work
Normal Course	1) User connects to the system using Internet Explorer 7.0 and the appropriate URL 2) User is prompted for a user-name and password 3) User provides a fully-qualified Username and Password combination 4) User is presented with the Portal's main screen which includes information concerning, "What does the PMO do?", "How is it done?", and "Are you ready to start a project?" 5) Any of these links will provide the User with links to supporting documentation that they can refer to in order to further clarify the nature of what process they're expected to follow.
Alternative Courses	1) User connects to the system using Internet Explorer 7.0 and the appropriate URL 2) User is prompted for a user-name and password 3) User provides an incorrect Username and Password combination 4) User receives a HTTP 401 Error indicating that the User is not authorized to connect to the webpage.
Exceptions	
Business Rules	Only staff who are authorized to view Sharepoint content are allowed to view this content. However, ALL valid users should be able to view this basic content.
Assumptions	• User has Adobe Flash-Player 9.0 or above installed • User does not connect using the wrong browser. (i.e. Firefox, Safari, etc.) • User has enabled javascript on their browser
Frequency of Use	High – All users will likely want to leverage this feature as a way to familiarize themselves with how they are supposed to proceed
Notes and Issues	

3.1.2. Stimulus/Response Sequences

#	Stimulus	Response
1	User types in URL or navigates to PMO home-site	If the user has not already done so, they are prompted to authenticate with a Username and Password

#	Stimulus	Response
2	User types in a Username and Password	User, if he/she has an appropriate Security Role assigned to their username, is presented with the PMO homepage with a Adobe Flash element providing a user-friendly quick-links navigation menu to proceed. If the user does NOT provide an accurate username and password combination or does not have the appropriate security role assigned to them, they are presented with a 401 HTTP error indicating that they are not authorized to view the page.
3	User clicks on links either on the left-hand navigation menu or in the Adobe Flash navigation short-cut screen	User is sent to one of several list-linked documents or ASPX pages that contains links to content further down in the Sharepoint site.

3.2. Feature: Navigating the Main Site

3.2.1. Functional Description

Actors	Project Initiator, Director, Project Lead, Project Sponsor, Developer, Systems Analyst, anyone with permissions to view site content
Description	The PMO Starter Kit will be organized in a similar fashion to other AOC Sharepoint sites. A "Document" List with Versioning and History enabled will contain the ASPX or HTML documents that will provide links to sub-content within other Document Lists in the site collection. Basic Sharepoint Workflow will be enabled on the "Pages" Document List ("Pages" is the name of the Document List that contains the ASPX and/or HTML pages) so that modifications to the content in these pages can be approved prior to being published. (Extensive detail about exactly how the site structure will look is not provided here because this is supposed to explain how the site will accomplish its tasks *functionally*.)
Priority	Medium
Pre conditions	• User is currently looking at the PMO portal's homepage
Post conditions	• User is familiar with the PMO project methodology and workflow process
Normal Course	1) User clicks on any of the available links in the Adobe Flash quick-links menu on the homepage – or – User clicks from anywhere on the site, any of the items on the left-side navigation menu which also happen to correspond with many of the Adobe Flash quick-links menu items 2) If User selects a parent-level link from either the Flash menu or the left-side nav menu parent-links… then they are directed to a ASPX or HTML page containing descriptive text about where what the sub-

	item documents and document-links will contain and why they are important. 3) User proceeds to navigate around the site in order to further educate them-selves about PMO's intended plan-of-attack for scoping out projects and how Project Initiators should go about gaining sponsorship. 
Alternative Courses	None
Exceptions	None
Business Rules	None
Assumptions	• User does not wish to manually type in URL's to where they wish to go on the site • User does not have a bookmark directly set for their target destination
Frequency of Use	High – All users will likely want to leverage this feature as a way to familiarize themselves with how they are supposed to proceed
Notes and Issues	The categories "What does the PMO do?", "How is it done?", and "Are you ready to start a project?" map in a one-to-one relationship with the following main Pages, "Administration", "Standards & Practices", and "Starting a Project" respectively.

	"Administration", "Standards & Practices", and "Starting a Project" are all custom ASPX pages that are stored in a "Pages" list and are edited using Sharepoint designer. Generally speaking, several Document Lists have been created in Sharepoint to support the content for each of the links under the 3 major categories on the left-side navigation menu.

3.2.2. Stimulus/Response Sequences

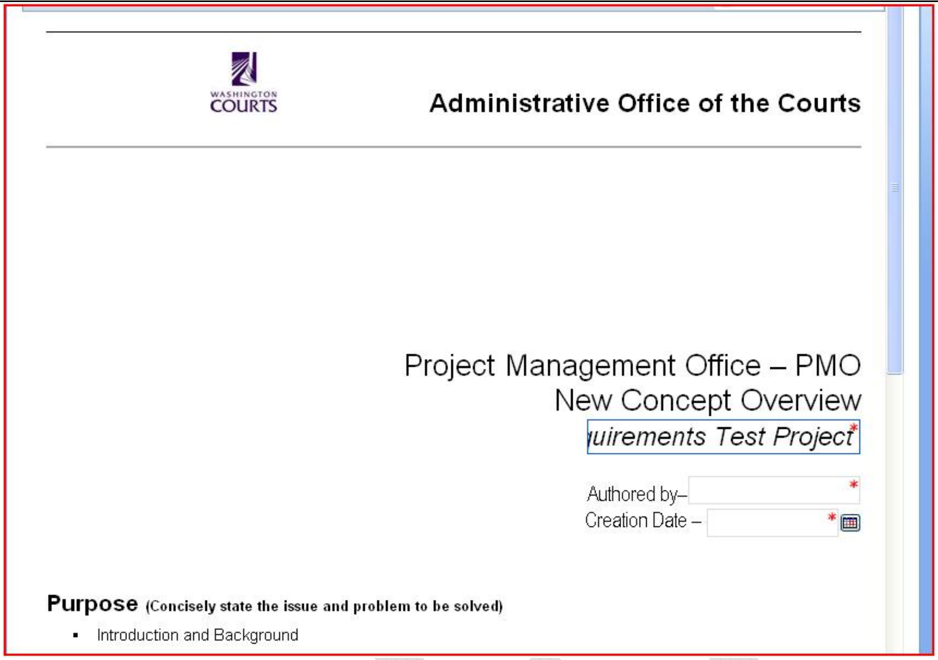
#	Stimulus	Response
1	User clicks on "Administration" from the left-side nav menu.	User is presented with HTML content indicating what Administrative duties the PMO performs. Subsequent links include: • Budget & Finance • Change Management • Contracts • Global Resource Management • IT Portfolio Management • Vendor Management Subsequent link content is generally stored in a separate Document List library. (Typically, 1 document list library per link specified above.)
2	User clicks on "Standards and Practices" from the left-side nav menu.	User is presented with HTML content indicating what the PMO Methodology is, what the PMO workflow looks like, and Other Resources for reference. Subsequent links include: • Framework Strategy • Methodology and Process • Roles and Responsibilities • Templates • Workflow Subsequent link content is generally stored in a separate Document List library. (Typically, 1 document list library per link specified above.)
3	User clicks on "Starting a Projcet" from the left-side nav menu	User is presented with HTML content detailing what the User will need to get started. Content should include helpful information about Case Studies, what to look out for, and how to increase the chances that your project will be approved for sponsorship. Subsequent links include: • Start Here – What you need to know • Getting Started – Submitting a New Concept Idea • Case Studies – Real World Examples • FAQs • Glossary Subsequent link content is generally stored in a separate

#	Stimulus	Response
		Document List library. (Typically, 1 document list library per link specified above.)
4	User doesn't know where to begin, so they likely click on the "Start Here – What you need to know" link	User is presented with helpful information in a user-friendly format that allows them to click on various links to explore finer levels of detail about the PMO methodology and what will be required of them. Basically, a small informational website within the Sharepoint site. (Leveraging Sharepoint's abilities and probably stored in the "Pages" document list mentioned in the Notes above.)
5	User determines all that they need to know to proceed	User will eventually click on "Create New Concept Overview Form" from one of several pages. (Hopefully, it will be made clear to the User prior to navigating to the actual NCO form… what they are about to do.)
6	User doesn't notice or understand the left-side navigation	The sub-links defined above are summarized in more readable text and displayed on the Adobe Flash version of the quick-links navigation structure. Even though they link to the same destinations, they are more user-friendly.

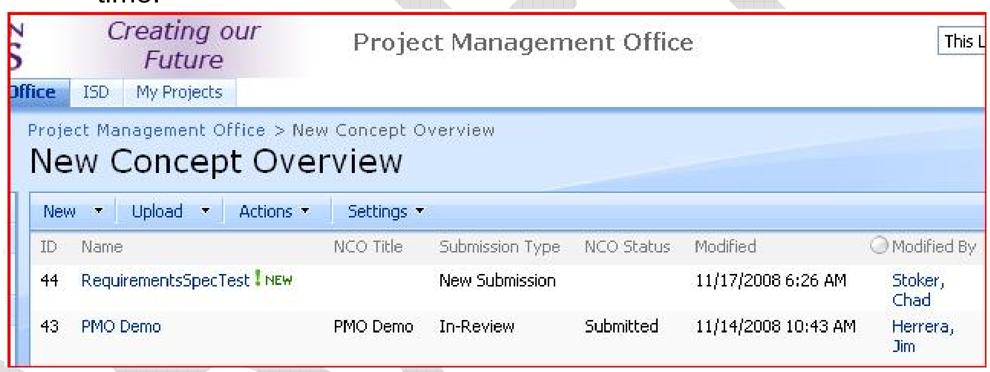
3.3. Feature: Creating a New Concept Overview (NCO)

3.3.1. Functional Description

Actors	Project Initiator, anyone with the responsibility of submitting a project concept for consideration
Description	During the outset of the PMO recommended workflow, (details available in the referenced documents section above) a "New Concept Overview" document will need to be filled out. The document will accomplish 2 important things. 1) It will help a Project Initiator to think through the impacts of their project idea. 2) It will provide a standard format for the PMO to review new project ideas with.
Priority	High
Pre conditions	• User has navigated to the appropriate page where a "Create New Concept Overview" link is available to them
Post conditions	• User is able to submit, preview, and/or otherwise store a NCO form
Normal Course	1) User provides a "Title" for the new project idea they have in mind. The "Title" is one of the mandatory fields in the NCO.



2) User provides other mandatory data such as “Author” and “Creation Date”.
3) User enters ALL other information for every field on the “New Concept Overview” document. Current fields defined include:
    a. Purpose
        i. Introduction and Background
        ii. What is the issue or problem?
        iii. Why is it important?
    b. Approach
        i. What are we going to do?
        ii. By when are we going to do it/when needed?
        iii. How large could this initiative be?
        iv. And with what resources (price, tools, people, resources, etc.)
    c. Rationale
        i. Why should we do it now?
        ii. How does it align with ISD strategy?
        iii. What is the perceived impact if we do it now?
    d. Expected Outcome
        i. Statements that depict the ideal when done
        ii. Statements that demonstrate a measurable outcome that eliminates an issue and/or problem
4) User reviews their work
5) User submits their NCO for review by the PMO
6) User follows instructions contained in the NCO submittal email instructing them to add the “Sponsor” and “Contact” information respectively. User clicks on the Email link to follow through and provide this information.
7) User clicks “Ok” and emails are sent to the PMO, the Contact, and the Sponsor notifying them of the status of the request with the appropriate links to the document.

	
Alternative Courses	1) User provides (or doesn't provide) complete information for the "New Concept Overview" document 2) User decides they don't want to proceed for whatever reason and selects "Close" on the document. 3) System or PMO Administrator eliminates old or out-of-date NCO's that have never been submitted for a pre-defined period of elapsed time. 
Exceptions	• User is leveraging Firefox or some other browser that does not support the InfoPath Rich Text Edit control
Business Rules	None
Assumptions	None
Frequency of Use	High – Project Initiators will use this feature to create new project ideas, document them, and submit them for eventual review by the PMO.
Notes and Issues	

3.3.2. Stimulus/Response Sequences

#	Stimulus	Response
1	User clicks on either the "**New Concept Form**" button on the "submitting a new concept" page or clicks on the link "**Create and**	A new "New Concept Overview (NCO)" InfoPath document is loaded in HTML form and presented to the User.

#	Stimulus	Response
	Submit the New Concept Overview form” which is found on the “What you need to know” page.	
2	User provides a Title, Author, and Creation Date since they are mandatory fields.	User is able to store and/or submit their document for review. When the document is stored, it takes on a status of “Pending” and is assigned an ID number that will be used for all subsequent project-related documentation. An email (based on the logged in user’s email address) is sent via Exchange to the inbox of the User explaining how they may navigate back to review and/or edit their NCO.
3	User decides that it is appropriate to Submit the form for review. The user presses the “Submit” button on the NCO form.	An event is triggered based on the first step in the Workflow identified for the project methodology and an email is sent to the Author of the document. Within the email, the user is re-directed to a page that instructs them to provide the “Creator” and “Sponsor” information related to the NCO. An NCO ID, if not already present, is created and assigned to this, and other, related project documents.
4	Alternatively, the user does NOT wish to submit the form for review yet, so they press the “Close” button in an effort to postpone their work.	On the FIRST “Close” button press of the NCO document, several dialogs will appear that will ask the user : “Do you want to save changes in this form?” Once the user answers “Yes”, the next dialog will prompt the user to provide a file-name. Once this is provided, an email will be sent to the user notifying them of where they can find the original NCO. Subsequent “Close” button clicks after the initial one will result in a loss of data EVEN IF YOU SELECT “YES” DURING THE PROMPT TO SAVE YOUR MODIFICATIONS. The prompt on “Close” button clicks following the 2^{nd}, 3^{rd}, etc. button press will be “Data on this form might have changed. Are you sure you want to close this form?” The only way, from this point forward, to modify your data is to submit it. So basically, you only get 1 chance to set data that will be stored. Subsequent efforts to modify data must result in a “submittal” of your form.
5	The User clicks the “Close” button and selects the “No” option when prompted with the “Data on this form might have changed. Are you sure you want to close this form?” dialog…	The attempt to “Close” the form is cancelled and the User remains on the NCO document that they were editing.

#	Stimulus	Response
6	The User clicks the “Print View” button	A dialog will notify the user that Print View cannot be used unless data modifications have been saved to the Server, at which point Sharepoint will automatically save your changes to the server for you. At this point, you may press the “Print View” button a second time and the data (including your changes) will appear on the screen. (Don’t let the fact that Sharepoint supposedly “stored” your changes on the server fool you… if you “Close” the form and come back to it… your data will still have been lost if this is the 2nd time you’ve pressed the “Close” button.)
7	After submitting the form, the User receives an email explaining that they must now provide a “Sponsor” and a “Contact” for the NCO document by clicking on a link within the Email. The User clicks on the “Sponsor/Contact” email link.	 The user fills in the textboxes for the Sponsor and Contact information. (These are currently wired to correspond to ONLY known users within the system so that emails may correctly be sent.) The user is supposed to **ignore** the Workflow State and Submission Type drop-down controls respectively. These items will be set programmatically in a later step.
8	User clicks the ‘Ok’ button on the ‘Sponsor/Contact’ NCO properties editor screen.	Upon clicking the ‘OK’ button, the Contact, Author, and Sponsor are notified of the change in the NCO’s status via email.
9	The User clicks on the “Click Here to release this document to the PMO” link in the email.	The user is presented with a screen that allows them to modify the “Submission Status”. The previous “Sponsor/Contact” screen currently also allows the user to modify the “Submission Status”… however the User is not supposed to perform that modification.

#	Stimulus	Response
		
10	The user clicks the “Save” button after modifying the “Submission Status” of the NCO record to “Submit to PMO”.	Following the changing of the “Submission Status” to “Submit to PMO”… the Author of the NCO, the Sponsor, and the Contact are all notified that the NCO was submitted for review to the PMO. Additionally, the PMO is notified that there is a pending NCO QA Checklist review that must be performed.

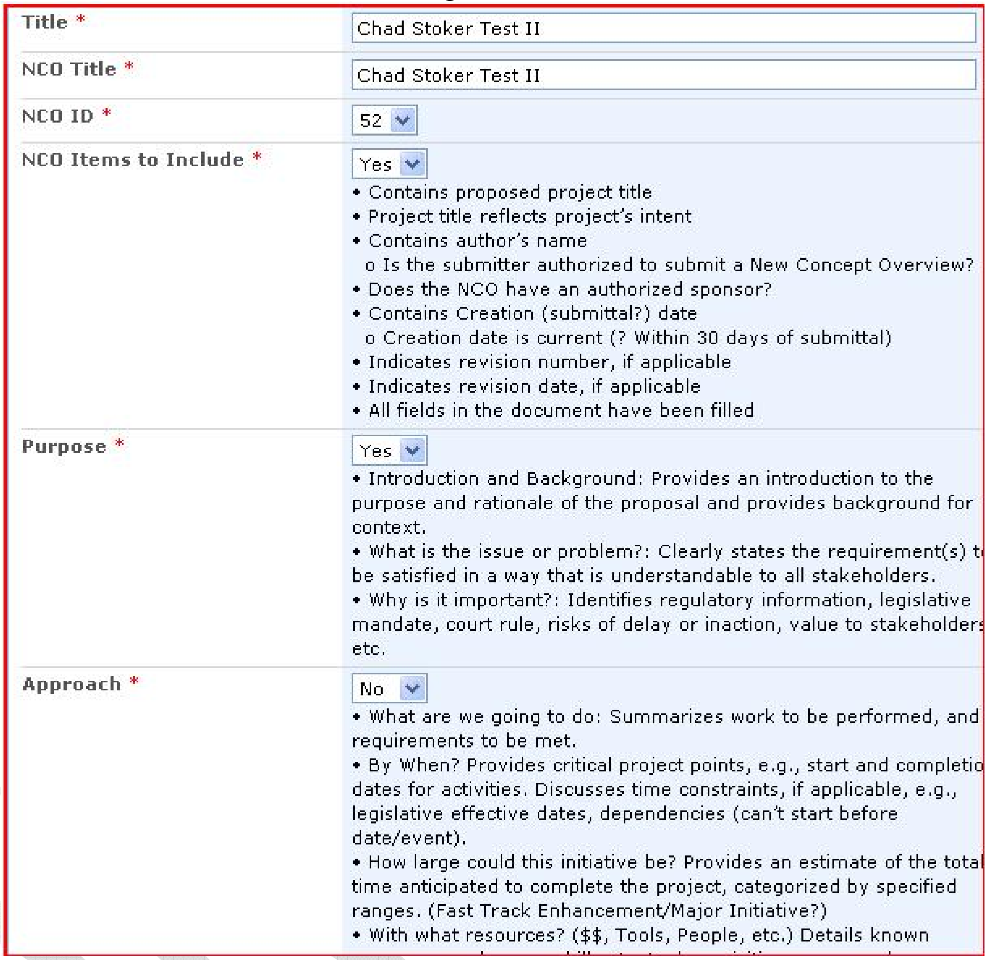
3.4. Feature: PMO NCO QA Checklist

3.4.1. Functional Description

Actors	Project Management Office
Description	The NCO QA Checklist review is the first step in the overall workflow that allows the PMO to summarily check over and evaluate a new idea submitted for review. This process asks several simple “yes/no” questions and prompts the PMO user to provide basic feed back to the original Project Initiator if necessary.
Priority	High
Pre conditions	• Project Initiator has submitted an NCO to the PMO for QA checklist assessment. The PMO has received an email indicating that there is a pending NCO Quality Assurance task to be completed.
Post conditions	• NCO is moved forward for review and scoring by the PMO • Revisions are requested for the NCO by the PMO User

Normal Course

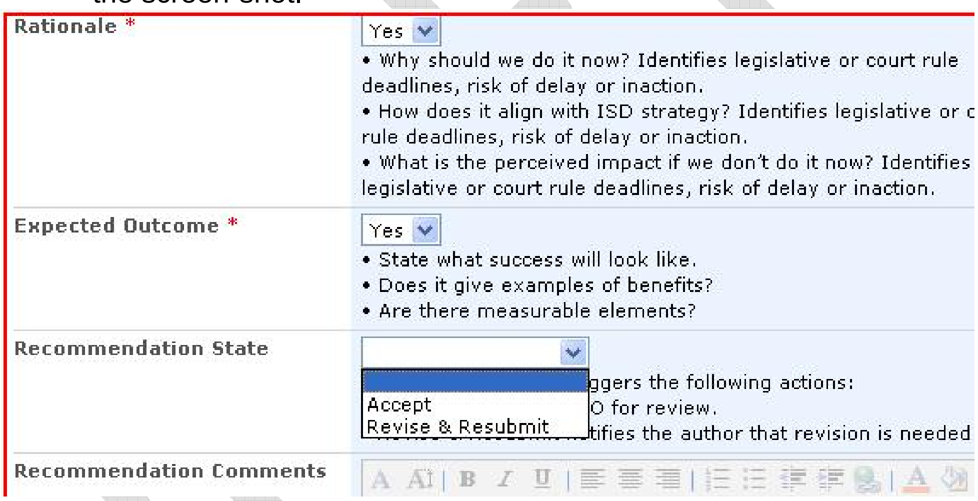
1) The Project Management Office receives an email in their inbox indicating that there is a new Project idea to consider.
2) Clicking on the link in the email presents them with a screen that looks similar to the following:



Title *	Chad Stoker Test II
NCO Title *	Chad Stoker Test II
NCO ID *	52
NCO Items to Include *	Yes • Contains proposed project title • Project title reflects project's intent • Contains author's name o Is the submitter authorized to submit a New Concept Overview? • Does the NCO have an authorized sponsor? • Contains Creation (submittal?) date o Creation date is current (? Within 30 days of submittal) • Indicates revision number, if applicable • Indicates revision date, if applicable • All fields in the document have been filled
Purpose *	Yes • Introduction and Background: Provides an introduction to the purpose and rationale of the proposal and provides background for context. • What is the issue or problem?: Clearly states the requirement(s) t be satisfied in a way that is understandable to all stakeholders. • Why is it important?: Identifies regulatory information, legislative mandate, court rule, risks of delay or inaction, value to stakeholders etc.
Approach *	No • What are we going to do: Summarizes work to be performed, and requirements to be met. • By When? Provides critical project points, e.g., start and completio dates for activities. Discusses time constraints, if applicable, e.g., legislative effective dates, dependencies (can't start before date/event). • How large could this initiative be? Provides an estimate of the total time anticipated to complete the project, categorized by specified ranges. (Fast Track Enhancement/Major Initiative?) • With what resources? ($$, Tools, People, etc.) Details known

3) The NCO Title and file Title should be automatically provided from the previous Workflow step in the NCO creation process.

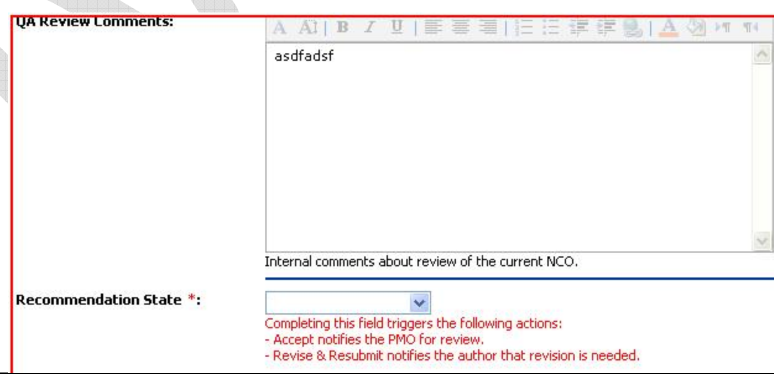
<table>
<tr>
<td></td>
<td>
4) User enters ALL other information for every field on the “NCO Quality Assurance Checklist” document. Current fields defined include:
a. Title
b. NCO Title
c. NCO ID
d. NCO Items to Include
e. Purpose
f. Approach
g. Rationale
h. Expected Outcome
i. Recommendation State
j. Recommendation Comments
k. QA Review Comments

5) On this screen, the User is able to store any modifications they have made without actually losing them. (This is different from how the NCO InfoPath form currently operates)
6) When the PMO User is ready, they can modify the Recommendation State field to either “Accept” or “Revise & Resubmit” as indicated in the screen-shot.


7) Once the “Accept” recommendation state has been selected and the information is saved, the PMO is again notified. However, this time… the notification results in the need to initiate a formal NCO Review & Assessment complete with scoring.
</td>
</tr>
<tr>
<td>Alternative Courses</td>
<td>
1) PMO User provides (or doesn’t provide) complete information for the “NCO QA Checklist” document.
2) PMO User decides they don’t want to proceed for whatever reason.
3) System or PMO Administrator eliminates old or out-of-date NCO QA Checklists that have never been completed for a pre-defined period of elapsed time.
</td>
</tr>
</table>

	
Exceptions	None
Business Rules	The "Recommendation State" must be provided prior to the system moving forward and requesting a revision on the NCO document.
Assumptions	None
Frequency of Use	High – The Project Management Office will be taking on a stream-lined load of Project ideas via this NCO QA Checklist list. The form will help the PMO Users to expedite their evaluations and move on.
Notes and Issues	

3.4.2. Stimulus/Response Sequences

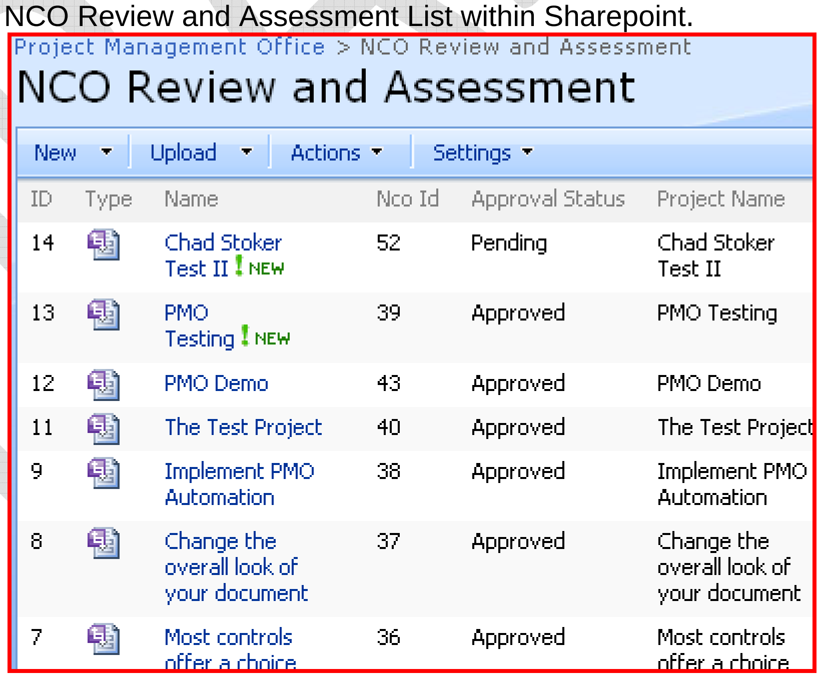
#	Stimulus	Response
1	PMO User receives an email in their inbox indicating a "New NCO QA Assessment Notice" is available. The user clicks on the link : "QA Assessment Form for this NCO"	The user is presented with the NCO QA Checklist which helps evaluate the NCO document. The user is supposed to provide all necessary information. Once complete, the PMO User should choose a "Recommendation State" for the NCO. 
2	PMO User chooses the "Revise and Resubmit" recommendation and hits 'Save'.	An email is automatically sent to the Author/Project Initiator indicating that they will need to "Revise and Resubmit" the original NCO for further consideration. The PMO email is also pinged about this update to the pending project item. This will take the process back to the feature titled : "Creating a New Concept Overview"

#	Stimulus	Response
3	PMO User chooses the “Accept” recommendation and hits ‘Save’.	An email is automatically sent to the PMO email indicating that they may now create a new “NCO Review and Assessment” document.

3.5. *Feature: Creating NCO Review and Assessment*

3.5.1. Functional Description

Actors	Project Management Office
Description	Once the PMO has completed an initial NCO Quality Assurance Checklist, the PMO will move on to the Review and Assessment phase of the project management methodology workflow. This phase will help to establish criteria for scoring and a quantifiable metric to be used later by the Director.
Priority	High
Pre conditions	• PMO User has already completed an NCO QA Checklist. PMO User has received an email instructing them that, at their convenience, they may create a new NCO Review and Assessment form.
Post conditions	• NCO is moved forward for review by the Director
Normal Course	1) PMO User clicks on the link in the email they received to “create a ‘PMO Review and Assessment’ document, click here” 2) Completing the link-click in the email generates a new record in the NCO Review and Assessment List within Sharepoint.



	3) User enters ALL other information for every field on the “NCO Review and Assessment” InfoPath document. Current fields defined include: a. Risk Assessment i. Risk of Completion on Time

	ii. Risk of Managing Multiple Organizations iii. Risk of Not Proceeding with the Project b. Benefit Assessment i. Alignment with JISC/AOC Strategic Goals ii. Initiative addresses business goals across multiple jurisdictions iii. Initiative impact on cross functional activities iv. Initiative impact on improving external customer service v. Initiative has little to no impact on costs to organization of doing a job or activity vi. Initiative may improve existing business processes vii. Initiative could significantly improve or eliminate business processes, resulting in cost savings and/or increased efficiencies 4) PMO User reviews their work 5) PMO User submits their NCO for review by the Director
Alternative Courses	1) PMO User provides (or doesn't provide) complete information for the "NCO Review and Assessment" document 2) PMO User decides they don't want to proceed for whatever reason and selects "Close" on the document. 3) System or PMO Administrator eliminates old or out-of-date "NCO Review Assessments" that have never been submitted for a pre-defined period of elapsed time.
Exceptions	None
Business Rules	None
Assumptions	None
Frequency of Use	High – Project Management Office staff will use this feature to score the NCO's that have been submitted to them
Notes and Issues	**NOTE** Please refer to the section titled, "Creating a New Concept Overview" for more information on the specific functionality for how the "Close" and "Print View" buttons will operate.

3.5.2. Stimulus/Response Sequences

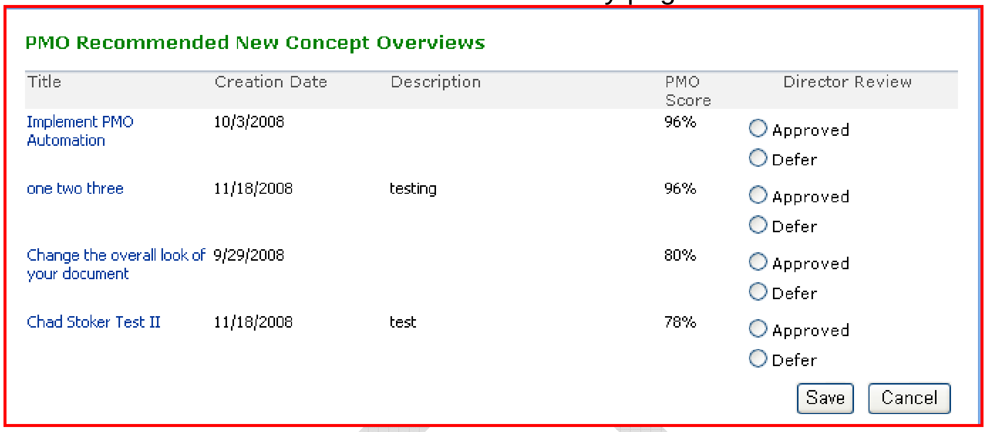
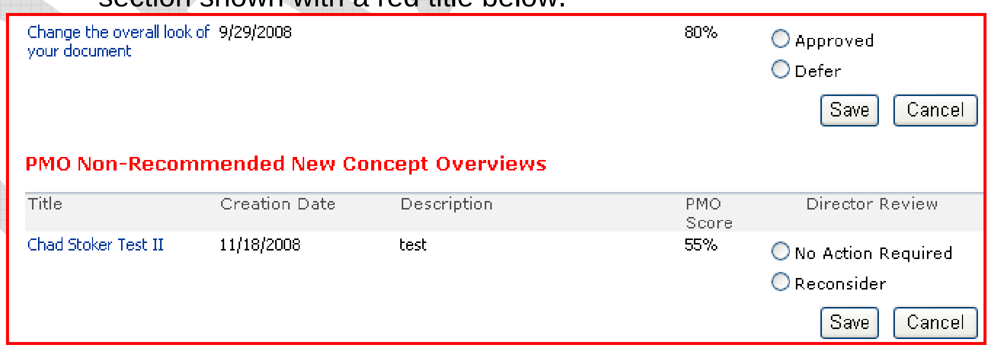
#	Stimulus	Response
1	PMO User clicks on the "To create a 'PMO Review and Assessment' document, click here" link in the email they have received in their inbox.	A new "NCO Review and Assessment" InfoPath form is loaded in HTML form and presented to the User.
2	PMO User specifies the Risks and Benefits they	Based on whether the User states that these aspects are rated, low, medium, or high… another scoring matrix is

#	Stimulus	Response
	perceive to be associated with the NCO.	used to calculate a percentage of probability that this NCO will be a viable project or not.
3	PMO User hits the "submit" button.	A trigger in the workflow is executed that applies the scoring of the document based on the user-specified values in the Risks and Benefits sections. A final score is applied to the NCO Review and Assessment record. A score below 70% is assigned a "non-recommended" status. Otherwise, the status of the NCO is assigned a "recommended" status for the Director's consideration. An email is generated and sent to the PMO to "finalize" the scoring and submit the NCO to the Director for review
4	PMO User clicks on the link to "submit the NCO for final review"	The user is presented with a screen with a single drop-down that allows them to choose to submit the scoring as-is for review by the Director.
	PMO User presses the 'save' button on the NCO review finalization screen	The record itself is then added into a queue for processing and consideration by the Director. (a.k.a. The Director is emailed monthly or bi-weekly) An email is generated that the Director receives during a regularly scheduled cycle.
5	PMO User hits the "Close" button	Please refer to the "Creating a New Concept Overview" feature for details on this.
6	PMO User hits the "Print View" button	Please refer to the "Creating a New Concept Overview" feature for details on this.

3.6. Feature: Batch Notification of Director

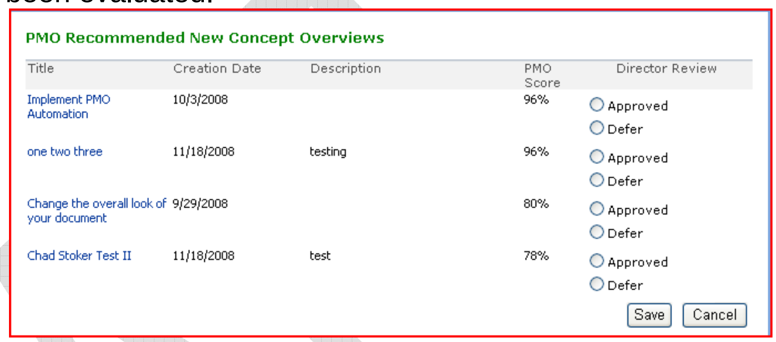
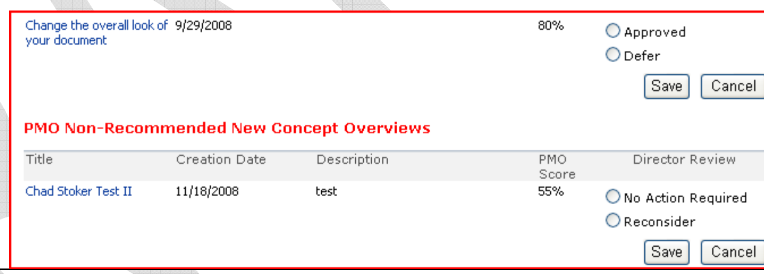
3.6.1. <u>Functional Description</u>

Actors	Project Management Office, Director
Description	Once the PMO rates the Risks and Benefits associated with the Project idea that's documented in the NCO, the PMO will submit the NCO Review and Assessment document to Sharepoint for scoring. At this point, Sharepoint's Workflow will take over and score the document and update a Sharepoint List with that information. The Director will then review the scores and recommendations of the PMO and make a final decision on the viability of the project(s).
Priority	High
Pre conditions	• PMO User has already completed and submitted a new NCO Review and Assessment document
Post conditions	• Project is approved for a Feasibility Study, Deferred until a later time,

	rejected, or the PMO is asked to reconsider.
Normal Course	1) Director receives a batch notification via email on a monthly or bi-weekly schedule. The director clicks on the email link to view the NCO Review and Assessment summary page  2) Director is able to select from 2 options in the “Recommendations” section shown with a green title above. The “Non-Recommended” items are included in a separate list with a red title. 3) Once the Director is satisfied with his/her decisions, he/she may hit the “Save” button for both the recommended and non-recommended categories shown. 4) This will result in an email to the PMO of the status. The original Project Initiator, Project Sponsor, and Project Contact will also be notified that they will need to create a “Feasibility” document.
Alternative Courses	1) Director receives a batch notification via email on a monthly or bi-weekly schedule. The director clicks on the email link to view the NCO Review and Assessment summary page 2) Director is able to select from 2 options in the “Non-Recommended” section shown with a red title below.  3) The Director can request that the PMO reconsider their “Non-Recommended” status or the Director can agree and click “No Action Required”. 4) Once the Director is satisfied with his/her decisions, he/she may hit the “Save” button for both the non-recommended items shown. 5) Emails will be sent either to the PMO in the event of a “reconsider” decision or to the Project Initiator and Project Sponsor in the event of a “No Action Required” for the Non-Recommended items.
Exceptions	None
Business Rules	None

Assumptions	None
Frequency of Use	High – Director will use this feature to evaluate the scores of the NCO's that have been submitted to him/her.
Notes and Issues	

3.6.2. Stimulus/Response Sequences

#	Stimulus	Response
1	Director clicks on the link in their inbox that directs them to a monthly or bi-weekly queue of NCO's for their consideration.	The NCOBatchReview.aspx page comes up and displays "recommended" and "non-recommended" NCO's that have been evaluated.  
2	Director picks "**Approved**" and presses the "Save" button on the Recommended item(s) of interest	An email is sent to the Project Sponsor and Project Initiator that a Feasibility Study will need to be performed. The PMO will be notified via email that they will now need to assign a Project Lead. Sharepoint will automatically create a record for the Feasibility documentation and provide a link to it in the email that is sent out to the PMO group.
3	Director picks "**Defer**" and presses the "Save" button on the Recommended item(s) of interest	The item is marked for review during the next future Director batch cycle. Effectively, "deferring" it. No emails are generated.
4	Director picks "**No Action Required**" and presses the "Save" button on the Non-Recommended item(s) of interest	An email is generated informing the ISD Lead, the Project Sponsor, and the Project Initiator that their project will not continue as currently specified. More importantly, the details of the NCO scoring and NCO contents should be archived for historical purposes at this

#	Stimulus	Response
		point. This will allow future Project Initiators an "NCO graveyard" to go review to see what aspects of a project idea cause it to be discarded.
5	Director picks "**Reconsider**" and presses the "Save" button on the Non-Recommended item(s) of interest	An email is generated that informs the PMO that they need to reconsider their recommendation based on certain criteria.

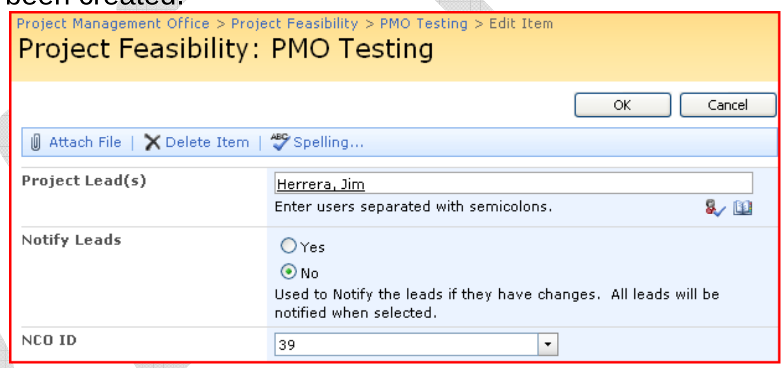
3.7. *Feature: Assign Project Lead(s)*

3.7.1. <u>Functional Description</u>

Actors	Project Management Office
Description	Once the Director has approved the "New Concept Overview" score and agrees that the project idea appears to be a viable and important one, a Feasibility study may commence. In this case, an InfoPath document needs to be filled out and a Project Lead will need to be assigned to direct or perform the effort. This Project Lead will later be leading the project through the rest of the process for project management.
Priority	High
Pre conditions	• Director has approved the project idea for further study and has submitted his recommendations.
Post conditions	• A Project Lead is assigned to the Project and a Feasibility Study is ready to be implemented.
Normal Course	1) Director reviews recommended items from the PMO and "Approves" various items for a Feasibility Study. 2) Workflow in Sharepoint establishes a new record in the "Project Feasibility Document" list. 3) The Project Sponsor and Project Initiator/Contact are both notified via email. 4) The PMO is notified that they must select a Project Lead before the Feasibility Study can begin. 5) The PMO logs on to the Sharepoint PMO site and assigns a lead via the "FeasibilityAssignLeads.aspx" page.
Alternative Courses	None
Exceptions	None
Business Rules	None
Assumptions	A Project Lead and Feasibility Document must be generated in order for this phase of the Workflow to continue.
Frequency of Use	Medium – Only approved projects will get this far. Once they do, this step will be critical in continuing the process. Relative to how frequently the

	"Create a new NCO" feature will be used… this is medium usage.
Notes and Issues	

3.7.2. Stimulus/Response Sequences

#	Stimulus	Response
1	Director saves at least one (or more) approved and recommended items.	The Workflow to start the Feasibility phase is kicked off. The Project Sponsor, Project Contact, and NCO Author are notified of the results. A Project Feasibility record is created to track the Feasibility document itself, track the assigned Project Lead, and more. The PMO is informed via email that they must select a Project Lead for the new Project Feasibility record that has been created. 
2	PMO Staff follow the link in their inbox to assign a lead to the new project	The PMO Users are taken to the new record in the Project Feasibility list. There they must modify the Project Lead field to include a person that exists in Sharepoint's user list. (Uses FeasibilityAssignLeads.aspx)
3	PMO User hits the "Save" button on the FeasibilityAssignLead.aspx page	A new Feasibility document is actually created for the first time. An email is sent out to the new Project Lead of the PMO's decision. A link for viewing the new Feasibility document is included in the email.

3.8. *Feature: Create Feasibility Document*

3.8.1. Functional Description

Actors	Project Lead
Description	The Project Lead will need to fill out the details in the Feasibility Document that has been programmatically created for them. They will provide

	important information about the size of the project, etc.
Priority	High
Pre conditions	• PMO has assigned a lead and the Sharepoint Workflow has created a new Feasibility document for the Project Lead to edit. • The link to the new Feasibility document has been provided in the notification email to the Project Lead
Post conditions	• A completed Feasibility document is submitted for review to the ISD Lead/PMO.
Normal Course	1) Project Lead clicks on the link to "create a new Feasibility Study" 2) Project Lead fills out Feasibility Information 3) The Project Lead clicks the "Submit" button to confirm that they are finished with their work. 4) The Project Feasibility Author and Project Lead are notified via email when the document has been completed and instructed to "Submit to the PMO" and change the status of the Workflow related to the Feasibility document. 5) The Project Lead who created the Feasibility document modifies the Workflow state and clicks, "Save". 6) The PMO is notified via email that they may now perform a QA checklist review on the Feasibility document.
Alternative Courses	1) Project Lead clicks on the link to "create a new Feasibility Study" 2) Project Lead fills out Feasibility Information 3) The Project Lead clicks the "Close" button to confirm that they are finished with their work. 4) The author saves their work and provides a file-name for later reference.
Exceptions	None
Business Rules	The NCO ID MUST be brought forward and stored as a field that is part of the Feasibility document. This will provide a tracking system through the Project management lifecycle.
Assumptions	The User must NOT have InfoPath on their desktop, or they will receive an error when working with this page.
Frequency of Use	Medium
Notes and Issues	**NOTE** Please refer to the document feature titled "Creating a New Concept Overview (NCO)" for more explicit details on how the "Close" and "Print View" buttons behave respectively on the InfoPath form.

3.8.2. Stimulus/Response Sequences

#	Stimulus	Response
1	Project Lead clicks on the link to "create a new Feasibility Study"	A new Feasibility Study document is created.
2	PMO Staff follow the link in their inbox to assign a lead to the new project	The PMO Users are taken to the new record in the Project Feasibility list. There they must modify the Project Lead field to include a person that exists in Sharepoint's user list. (Uses FeasibilityAssignLeads.aspx)

#	Stimulus	Response
		An email is sent out to the new Project Lead of the PMO's decision. A link for creating a new Feasibility document is included in the email.

3.9. Feature: Create Statement of Work Document

3.9.1. Functional Description

Actors	Project Lead
Description	The Project Lead will need to fill out the details in the Feasibility Document that has been programmatically created for them. They will provide important information about the size of the project, etc.
Priority	High
Pre conditions	• PMO has assigned a lead and the Sharepoint Workflow has created a new Feasibility document for the Project Lead to edit. • The link to the new Feasibility document has been provided in the notification email to the Project Lead
Post conditions	• A completed Feasibility document is submitted for review to the ISD Lead/PMO.
Normal Course	1) Director reviews recommended items from the PMO and "Approves" various items for a Feasibility Study. 2) Workflow in Sharepoint establishes a new record in the "Project Feasibility Document" list. 3) The Project Sponsor and Project Initiator/Contact are both notified via email. 4) The PMO is notified that they must select a Project Lead before the Feasibility Study can begin. 5) The PMO logs on to the Sharepoint PMO site and assigns a lead via the "Project Feasibility" List.
Alternative Courses	None
Exceptions	None
Business Rules	None
Assumptions	A Project Lead and Feasibility Document must be generated in order for this phase of the Workflow to continue.
Frequency of Use	Medium – Only approved projects will get this far. Once they do, this step will be critical in continuing the process. Relative to how frequently the "Create a new NCO" feature will be used… this is medium usage.
Notes and Issues	

3.9.2. Stimulus/Response Sequences

#	Stimulus	Response

#	Stimulus	Response
1	Director saves at least one (or more) approved and recommended items	The Workflow to start the Feasibility phase is kicked off. The Project Sponsor, Project Contact, and NCO Author are notified of the results. A Project Feasibility record is created to track the Feasibility document itself, the assigned Project Lead, and more. The PMO is informed via email that they must select a Project Lead for the new Project Feasibility record that has been created.
2	PMO Staff follow the link in their inbox to assign a lead to the new project	The PMO Users are taken to the new record in the Project Feasibility list. There they must modify the Project Lead field to include a person that exists in Sharepoint's user list. (Uses FeasibilityAssignLeads.aspx) An email is sent out to the new Project Lead of the PMO's decision. A link for creating a new Feasibility document is included in the email.

3.10. Feature: PMO Feasibility QA Checklist

3.10.1. Functional Description

Actors	Project Lead
Description	The Project Lead will need to fill out the details in the Feasibility Document that has been programmatically created for them. They will provide important information about the size of the project, etc.
Priority	High
Pre conditions	• A Statement of Work has been completed.
Post conditions	• Accept or Revise the Feasibility and Statement of Work documents
Normal Course	1) Director reviews recommended items from the PMO and "Approves" various items for a Feasibility Study. 2) Workflow in Sharepoint establishes a new record in the "Project Feasibility Document" list. 3) The Project Sponsor and Project Initiator/Contact are both notified via email. 4) The PMO is notified that they must select a Project Lead before the Feasibility Study can begin. 5) The PMO logs on to the Sharepoint PMO site and assigns a lead via the "Project Feasibility" List.
Alternative Courses	None
Exceptions	None
Business Rules	None

Assumptions	A Project Lead and Feasibility Document must be generated in order for this phase of the Workflow to continue.
Frequency of Use	Medium – Only approved projects will get this far. Once they do, this step will be critical in continuing the process. Relative to how frequently the “Create a new NCO” feature will be used… this is medium usage.
Notes and Issues	

3.10.2. Stimulus/Response Sequences

#	Stimulus	Response
1	Director saves at least one (or more) approved and recommended items	The Workflow to start the Feasibility phase is kicked off. The Project Sponsor, Project Contact, and NCO Author are notified of the results. A Project Feasibility record is created to track the Feasibility document itself, the assigned Project Lead, and more. The PMO is informed via email that they must select a Project Lead for the new Project Feasibility record that has been created.
2	PMO Staff follow the link in their inbox to assign a lead to the new project	The PMO Users are taken to the new record in the Project Feasibility list. There they must modify the Project Lead field to include a person that exists in Sharepoint’s user list. (Uses FeasibilityAssignLeads.aspx) An email is sent out to the new Project Lead of the PMO’s decision. A link for creating a new Feasibility document is included in the email.

3.11. Feature: EA QA Feasibility Review

3.11.1. Functional Description

Actors	Project Lead
Description	The Project Lead will need to fill out the details in the Feasibility Document that has been programmatically created for them. They will provide important information about the size of the project, etc.
Priority	High
Pre conditions	• PMO has assigned a lead and the Sharepoint Workflow has created a new Feasibility document for the Project Lead to edit. • The link to the new Feasibility document has been provided in the notification email to the Project Lead
Post conditions	• Accept or Revise & Resubmit
Normal Course	1) Director reviews recommended items from the PMO and “Approves”

	various items for a Feasibility Study. 2) Workflow in Sharepoint establishes a new record in the “Project Feasibility Document” list. 3) The Project Sponsor and Project Initiator/Contact are both notified via email. 4) The PMO is notified that they must select a Project Lead before the Feasibility Study can begin. 5) The PMO logs on to the Sharepoint PMO site and assigns a lead via the “Project Feasibility” List.
Alternative Courses	None
Exceptions	None
Business Rules	None
Assumptions	A Project Lead and Feasibility Document must be generated in order for this phase of the Workflow to continue.
Frequency of Use	Medium – Only approved projects will get this far. Once they do, this step will be critical in continuing the process. Relative to how frequently the “Create a new NCO” feature will be used… this is medium usage.
Notes and Issues	

3.11.2. Stimulus/Response Sequences

#	Stimulus	Response
1	Director saves at least one (or more) approved and recommended items	The Workflow to start the Feasibility phase is kicked off. The Project Sponsor, Project Contact, and NCO Author are notified of the results. A Project Feasibility record is created to track the Feasibility document itself, the assigned Project Lead, and more. The PMO is informed via email that they must select a Project Lead for the new Project Feasibility record that has been created.
2	PMO Staff follow the link in their inbox to assign a lead to the new project	The PMO Users are taken to the new record in the Project Feasibility list. There they must modify the Project Lead field to include a person that exists in Sharepoint’s user list. (Uses FeasibilityAssignLeads.aspx) An email is sent out to the new Project Lead of the PMO’s decision. A link for creating a new Feasibility document is included in the email.

3.12. Feature: Create EA Feasibility Scoring Document

3.12.1. Functional Description

Actors	Project Lead
Description	The Project Lead will need to fill out the details in the Feasibility Document that has been programmatically created for them. They will provide important information about the size of the project, etc.
Priority	High
Pre conditions	• PMO has assigned a lead and the Sharepoint Workflow has created a new Feasibility document for the Project Lead to edit. • The link to the new Feasibility document has been provided in the notification email to the Project Lead
Post conditions	• Accept or Revise & Resubmit
Normal Course	6) Director reviews recommended items from the PMO and "Approves" various items for a Feasibility Study. 7) Workflow in Sharepoint establishes a new record in the "Project Feasibility Document" list. 8) The Project Sponsor and Project Initiator/Contact are both notified via email. 9) The PMO is notified that they must select a Project Lead before the Feasibility Study can begin. 10) The PMO logs on to the Sharepoint PMO site and assigns a lead via the "Project Feasibility" List.
Alternative Courses	None
Exceptions	None
Business Rules	None
Assumptions	A Project Lead and Feasibility Document must be generated in order for this phase of the Workflow to continue.
Frequency of Use	Medium – Only approved projects will get this far. Once they do, this step will be critical in continuing the process. Relative to how frequently the "Create a new NCO" feature will be used… this is medium usage.
Notes and Issues	

3.12.2. Stimulus/Response Sequences

#	Stimulus	Response
1	Director saves at least one (or more) approved and recommended items	The Workflow to start the Feasibility phase is kicked off. The Project Sponsor, Project Contact, and NCO Author are notified of the results. A Project Feasibility record is created to track the Feasibility document itself, the assigned Project Lead, and more. The PMO is informed via email that they must select a

#	Stimulus	Response
		Project Lead for the new Project Feasibility record that has been created.
2	PMO Staff follow the link in their inbox to assign a lead to the new project	The PMO Users are taken to the new record in the Project Feasibility list. There they must modify the Project Lead field to include a person that exists in Sharepoint's user list. (Uses FeasibilityAssignLeads.aspx) An email is sent out to the new Project Lead of the PMO's decision. A link for creating a new Feasibility document is included in the email.

3.13. Feature: PMO Feasibility Review & Assessment

3.13.1. Functional Description

Actors	Project Lead (llok at Feasibility Study Review and Assessment)
Description	The Project Lead will need to fill out the details in the Feasibility Document that has been programmatically created for them. They will provide important information about the size of the project, etc.
Priority	High
Pre conditions	• PMO has assigned a lead and the Sharepoint Workflow has created a new Feasibility document for the Project Lead to edit. • The link to the new Feasibility document has been provided in the notification email to the Project Lead
Post conditions	• Accept or Revise & Resubmit
Normal Course	11) Director reviews recommended items from the PMO and "Approves" various items for a Feasibility Study. 12) Workflow in Sharepoint establishes a new record in the "Project Feasibility Document" list. 13) The Project Sponsor and Project Initiator/Contact are both notified via email. 14) The PMO is notified that they must select a Project Lead before the Feasibility Study can begin. 15) The PMO logs on to the Sharepoint PMO site and assigns a lead via the "Project Feasibility" List.
Alternative Courses	None
Exceptions	None
Business Rules	None
Assumptions	A Project Lead and Feasibility Document must be generated in order for this phase of the Workflow to continue.
Frequency of Use	Medium – Only approved projects will get this far. Once they do, this step will be critical in continuing the process. Relative to how frequently the "Create a new NCO" feature will be used… this is medium usage.

Notes and Issues	

3.13.2. Stimulus/Response Sequences

#	Stimulus	Response
1	Director saves at least one (or more) approved and recommended items	The Workflow to start the Feasibility phase is kicked off. The Project Sponsor, Project Contact, and NCO Author are notified of the results. A Project Feasibility record is created to track the Feasibility document itself, the assigned Project Lead, and more. The PMO is informed via email that they must select a Project Lead for the new Project Feasibility record that has been created.
2	PMO Staff follow the link in their inbox to assign a lead to the new project	The PMO Users are taken to the new record in the Project Feasibility list. There they must modify the Project Lead field to include a person that exists in Sharepoint's user list. (Uses FeasibilityAssignLeads.aspx) An email is sent out to the new Project Lead of the PMO's decision. A link for creating a new Feasibility document is included in the email.

3.14. Feature: Batch Director Feasibility Review

3.14.1. Functional Description

Actors	Project Lead (look at FeasibilityBatchDirectorReview)
Description	The Project Lead will need to fill out the details in the Feasibility Document that has been programmatically created for them. They will provide important information about the size of the project, etc.
Priority	High
Pre conditions	• PMO has assigned a lead and the Sharepoint Workflow has created a new Feasibility document for the Project Lead to edit. • The link to the new Feasibility document has been provided in the notification email to the Project Lead
Post conditions	• Accept or Revise & Resubmit
Normal Course	16) Director reviews recommended items from the PMO and "Approves" various items for a Feasibility Study. 17) Workflow in Sharepoint establishes a new record in the "Project Feasibility Document" list. 18) The Project Sponsor and Project Initiator/Contact are both notified via email.

	19) The PMO is notified that they must select a Project Lead before the Feasibility Study can begin. 20) The PMO logs on to the Sharepoint PMO site and assigns a lead via the “Project Feasibility” List.
Alternative Courses	None
Exceptions	None
Business Rules	None
Assumptions	A Project Lead and Feasibility Document must be generated in order for this phase of the Workflow to continue.
Frequency of Use	Medium – Only approved projects will get this far. Once they do, this step will be critical in continuing the process. Relative to how frequently the “Create a new NCO” feature will be used… this is medium usage.
Notes and Issues	

3.14.2. Stimulus/Response Sequences

#	Stimulus	Response
1	Director saves at least one (or more) approved and recommended items	The Workflow to start the Feasibility phase is kicked off. The Project Sponsor, Project Contact, and NCO Author are notified of the results. A Project Feasibility record is created to track the Feasibility document itself, the assigned Project Lead, and more. The PMO is informed via email that they must select a Project Lead for the new Project Feasibility record that has been created.
2	PMO Staff follow the link in their inbox to assign a lead to the new project	The PMO Users are taken to the new record in the Project Feasibility list. There they must modify the Project Lead field to include a person that exists in Sharepoint’s user list. (Uses FeasibilityAssignLeads.aspx) An email is sent out to the new Project Lead of the PMO’s decision. A link for creating a new Feasibility document is included in the email.