bluerave

Legal New Client Flexi-POD Questionnaire

Summary of Contents

The objectives of this questionnaire are:-

- to document all the revisions that are required to the "base" Flexi-POD
- to fully discover the environment that the Flexi-POD will be operating in
- to document the sources of information (roles, rules etc)

When this document is signed off by the client, together with the existing functionality of the "base" Flexi-POD, it becomes the full specification of the Flexi-POD to be developed by Bluerave.

The questionnaire is broken down into 15 sections:-

1. The environment
2. The corporate style
3. The process map(s)
4. The rules (business logic)
5. Statement of the sources of role and function information
6. Definition of the Digital Dashboard
7. The revisions to each form/step
8. Definition of the status lights
9. Definition of all the interfaces and methods
10. Definition of all the physical outputs
11. Definition of on screen help
12. Definition of the test pack
13. Definition of the training program
14. Acknowledgement of the skill set and resources of the client
15. Additional considerations

1. **The environment** – the following needs to be understood:-
    - Hardware server environment
    - Server operating system
    - Existing database support
    - Existing Web server
    - Existing desktop operating system(s)
    - Existing office automation software
    - Network architecture
    - Remote access standards
    - User logon authentication method
    - Use of Active Directory (AD)
    - Use of AD Groups, LDAP's and ADAM's
    - Use of Single Sign On (SSO)
    - Existing intranet
    - Existing portal(s)
    - Existing use of SharePoint
    - How the client's internal help desk works
    - Plans over the next 24 months that may effect any of the above

2. **The corporate style** – The corporate style needs to be agreed, including:-
    - Corporate logo
    - Corporate banner
    - Standard variable elements of banner (E.g. "required by")
    - Corporate background
    - On screen help access standard and method

3. **The process map(s)** – Initially the client is supplied with a “base” process map, for convenience of analysis this is then broken down into meaningful sub-processes. During the discovery phase, these process maps are worked on, in real-time, to arrive at the overall map of the process(es). This is all completed within the Ultimus Processes Designer application and finally cut and pasted into the questionnaire

4. **The rules (business logic)** – Having arrived at the required process map(s). Each step is individually named (or numbered) and the rules to why a process proceeds from step “x” to step “y” or step “z” are determined. These are entered directly into the Ultimus Process Designer/Documentation. The Process documentation wizard is then used to output all these rules, which are the cut and pasted en mass into the questionnaire.

5. **Statement of the sources of role and function information** – Information on people and the relationships between people is often held in multiple systems. For example, you may hold the “Department” an individual is in, within AD or a Novell LDAP. But, seldom can you obtain that individuals line manager, departmental head, other partners in the same department, purchasing limits etc… from the same source. So having decided the rules that will be required for routing already, we need to be sure we have electronic access to suitable sources of the information needed to apply the rules.

   In the worst case where no source is available, decisions need to be made on how it will be obtained and maintained.

6. **Definition of the Digital Dashboard** – Although there is no limit on the digital dashboard in terms of the number of individual BAM monitors. The Flexi-POD is supplied with only 5 BAM monitors and these are specific to the Flexi-POD process being implemented. This section details the precise nature of those 5 monitors.

7. **The revisions to each form/step** – It is likely that the forms vary from step to step. Having arrived at a firm definition of all the steps in “3” above, and defined the corporate style in “1” above. The form from each step is screen dumped and notes are made of all the revisions required. Both global and step by step.

8. **Definition of the status lights** – The Flexi-POD comes standard with 10 status fields showing; not started (red), in progress (yellow) and completed (green). Decisions are made on how many status checks will be used (0 to 10) and the exact criteria that changes a ststus from red to yellow and yellow to green.

9. **Definition of all the interfaces and methods** – The Flexi-POD is designed to take data from existing systems (PMS, DMS, etc), to exchange information with external systems (Credit check and identity confirmation), and to write back to various systems (PMS, DMS etc). A full list is made detailing each of these interfaces, detailing what information is passed and the method deployed (Web service, API, direct read, BizTalk, etc).

10. **Definition of all the physical outputs** – Where hard copy outputs are required, (E.g. emails and letters chasing identity proofs or checklists for fixing to physical files), the existence of the various templates need to be established, and precisely what data needs to be passed from the process to the templates needs to be defined.

11. **Definition of on screen help** – The Flexi-POD can operate with form and field based pop-up help. What help will be provided and the indexing method for the help is defined.

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12. **Definition of the test pack** – Bluerave supply a test pack which provides single tests for read, write and update for each of the existing systems will interface with the Flexi-POD. Plus process examples that match the rules/routing defined in “3” and “4” above. These are fully defined and added by Bluerave into this questionnaire. This becomes the complete test pack unless Bluerave and the client agree to add additional tests.

13. **Definition of the training program** – The exact nature of all the training required is documented and the responsibility of each side. (E.g. Train-the-trainer is defined).

14. **Acknowledgement of the skill set and resources of the client** – With the knowledge of the environment (“1” above) and the interfaces (“9” above). A list is drawn of the areas of technical knowledge that will need to be accessed during the build of the Flexi-POD and its subsequent live running. This list is then cross referenced to the clients staff and their individual skill sets, to uncover any potential areas of exposure. Potential risk areas are then identified and recommendations are made to minimise/eliminate risk.

15. **Additional considerations** – During the discovery phase and through answering the previous 14 areas of the questionnaire, other considerations may arise that need to be taken into account. They are listed in this section, together with whatever else is necessary to appreciate their impact.

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