

1 REQUIREMENTS & ANALYSIS

1.1 PROJECT SCOPE & ASSUMPTIONS

- Document Name:** [Guiding Principles](#)
Purpose: To highlight principles that will drive decisions affecting the outcome and overall success of the project.
- Description:** Guiding Principles is a brief, high-level sample document addressing topics such as project priorities, objectives, and assumptions.
- Document Name:** [Assumptions](#)
Purpose: To document assumptions which are key to ensuring that project goals and client expectations can be met.
- Description:** Assumptions used as estimating guidelines are listed for the overall application as well as for specific objectives of the application such as enhancing customer partnership and enabling order placement.
- Document Name:** [Functionality Definition](#)
Purpose: To provide a brief, high-level overview of the application functionality and key requirements.
- Description:** This example consists of a brief overview of application functionality in paragraph form as well as a brief list of key requirements.

1.2 HIGH-LEVEL PROCESS FLOWS

- Document Name:** [End User Process Flow](#)
Purpose: To provide a high-level representation of application processing from the end user's perspective. Use this document to drive-out requirements.
- Description:** The End User Process Flow diagram depicts the primary processes involved in each major functional category of the application. This sample encompasses previewing site membership benefits, presenting membership benefits, registration, authentication, exception handling, user profile maintenance, and customer assistance.
- Document Name:** [End User Process Flow Summary](#)
Purpose: To elaborate on the business processes depicted in the End User Process Flow Diagram.
- Description:** The End User Process Flow summary is a useful supplement to the diagram. Brief descriptions are provided for each business process depicted in the diagram.
- Document Name:** [Internal Process Flow](#)
Purpose: To provide a high-level representation of application processing from an internal administration perspective. Use this document to drive-out requirements.
- Description:** The Internal Process Flow diagram depicts the primary processes involved in three key areas of administrative responsibility. This sample document highlights member profile maintenance, reporting, and content management/publishing.

1.3 FUNCTIONAL REQUIREMENTS

- Document Name:** [Functional Requirements1](#)
- Purpose:** To capture a thorough definition of the product to be delivered. Use this document to get sign-off from key constituents before progressing to detailed application design. This document will also be a necessary input for defining technical requirements.
- Description:** The functional requirements document, or Product Requirements Document (PRD) as this example is named, is a comprehensive deliverable segmented into several sections. The document consists of a scope statement, team roster, project benefits, functional requirements (including end user and internal process flows and detailed requirements), a content framework, a program schedule, roll-out schedule, measurable results, guiding principles, key assumptions and risks and more.
- Document Name:** [Functional Requirements2](#)
- Purpose:** To capture a thorough definition of the product to be delivered. Use this document to get sign-off from key constituents before progressing to detailed application design. This document will also be a necessary input for defining technical requirements.
- Description:** The functional requirements document, or Product Objectives & Requirements (POR) as this example is named, is a comprehensive deliverable segmented into several sections. This document consists of an executive summary, project objectives, an overview of the current environment, detailed requirements, critical success factors, solutions, and a project plan.

2 DETAILED DESIGN

2.1 BUSINESS PROCESS DESIGN

- Document Name:** [Bay Business Processes](#)
- Purpose:** To define the process for maintaining the product to be delivered. Use this document as a sample deliverable when defining business processes.
- Description:** The Bay Business Processes document is an example from an eCommerce Project. This sample highlights the process for maintaining product information, attributes, and hierarchy in the web-enabled product catalog delivered for the client. The document provides a process scope description, process flow diagram, and then describes each process in the flow diagram.

2.2 DETAILED APPLICATION DESIGN

- Document Name:** [Detailed Registration Flow](#)
- Purpose:** To provide a detailed depiction of application processing including all scenarios/decision points and exception handling. Use this document as input for creating detailed program specifications.
- Description:** The Detailed Registration Flow diagram depicts normal processing and exception processing, and decision points within a registration application.
- Document Name:** [Detailed Application Design](#)

Purpose: To provide detailed specifications from which the application can be developed.
Description: The Detailed Application Design document is a comprehensive detailed design document. The document consists of a detailed application flow diagram and specifications for each component. Component specifications include a component-action-response (CAR) diagrams and specific descriptions of functionality, parameters, processing, etc.

2.3 STORYBOARD

Document Name: [Site Map](#)
Purpose: To provide an overview of the structure of a web site. Use this document to confirm the structure of the site to be developed and use it as a basis for creating the HTML storyboard.
Description: The site map example depicts the page flow for a site offering benefits to users who register for site membership. All functional categories of the site are depicted however each box may represent multiple pages.

Document Name: [Storyboard](#)
Purpose: To provide a sample of the site to be developed to further drive-out requirements and feedback to incorporate in the final product design.
Description: This sample storyboard consists of numerous pages built for a registration based web application. Pages are represented to preview membership rewards, to register for the site, to access member benefits, to reference FAQ's, etc. The look and feel of the site has been kept minimal since the storyboard in this case represents intended structure/purpose/functionality rather than aesthetic qualities. Each page contains three sections: a page description, a list of content topics and links, and a description of processing. A suggested improvement to this storyboard's design is to differentiate between pre-processing and post-processing when documenting the processing involved in each page. To browse the storyboard, unzip the storyboard file, then launch project_x_home_page.htm.

Document Name: [Bay Storyboard](#)
Purpose: To provide a sample of the site to be developed to further drive-out requirements and feedback to incorporate in the final product design.
Description: The Bay Storyboard is an example. The document contains snapshots of pages intended for providing a product catalog on the site. The storyboard represents the intended purpose/functionality for each page as well as encompassing some aesthetic appeal. If a creative department or company will be responsible for the look and feel of the site, it may be advantageous to avoid prescribing aesthetics qualities. Also, the structure of the site may be more readily absorbed if the user navigates through the storyboard via a browser as opposed to a linear navigation through a presentation.

2.4 DEMO/PROTOTYPE

Document Name: [Bay Pilot Script](#)
Purpose: To solicit and collect feedback on a demo of the site to be delivered.
Description: The document primarily consists of a screen/action description alongside a corresponding screen image for each page of the demo. The demo user is asked to provide feedback on specific topics for particular pages. A form is included at the end of document, which was used to collect feedback.

3 WORKING WITH CREATIVE COMPANIES

3.1 CONTENT FRAMEWORK

- Document Name:** [Content Framework](#)
- Purpose:** To define the types of content to be made available on the site and to identify the benefits of each to the parties involved.
- Description:** This excerpt from a Content Framework presentation consists of three key slides. The first slide displays a description, the technological impact, the level of content manager involvement, and the lead-time to production for each type of content intended for the site. The second slide highlights the benefits to the content partner, to the client, and to the customer for each type of content. Lastly, the third slide is a screen shot of a sample web page where various content types are depicted.

3.2 COORDINATION

- Document Name:** [Creative Interaction](#)
- Purpose:** To represent the necessary interaction between an application development team and a creative house as well as a content localization/translation group.
- Description:** The Creative Interaction diagram depicts the interaction between entities, which may be involved in a web application, build process. The sample document shows the interaction between these three entities: a creative house, an application development team, and a “Geo” who is responsible for content localization/translation for a specific geography. A key point to be taken from this example is that an HTML skeleton, or storyboard, will be a very useful preliminary step in the build process. By having the application team build the HTML skeleton early on, the Geos and the creative house can be doing their part in content creation/localization/translation while the application development team builds application functionality.
- Document Name:** [Content Sourcing Matrix](#)
- Purpose:** To track and provide a roadmap for content execution.
- Description:** The Content Sourcing Matrix is a spreadsheet documenting several aspects of content execution. The spreadsheet is organized by content categories and sub-categories. Details for each content element are listed such as the description, source, requirements, location, owner/contacts, target publish date, etc.
- Document Name:** [Content Publication Schedule](#)
- Purpose:** To manage the manner and method of content delivery as well as the deadline for publication.
- Description:** The Content Publication Schedule documents key areas to manage when working with a creative house. This example is segmented into four sections; a list of content requirements to be met, a list of content categories, a cover sheet to be used when delivering content, and a schedule which documents details such as content priority, owner, deadline, status, etc.
- Document Name:** [Web Page Standards](#)
- Purpose:** To provide a checklist for ensuring that the client’s web site standards are achieved.
- Description:** The Web Page Standards example documents standards for several aspects of web site code and design. This sample provides standards checklists with respect to web page layout, text, naming standards, comments, indentation, tables, images, and printing.