

Society of PM Professionals of Greater Vancouver

**Website Upgrade Project
Requirements Specification**

Revision 5

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Introduction

This document establishes the requirements for a project to upgrade and make specified changes to the Society website.

The four major deliverables from the project shall be:

1. Additions to the content of the existing site and a reorganization of the pages on the site.
2. A repository of abstracts, biographies, presentations, and workshop outputs for all PD seminars conducted to date.
3. Secured web hosting service with adequate capacity to support the website through 2012
4. An operations plan for the continued operation and maintenance of the website.

The detailed specifications and acceptance criteria for the deliverable items are set out in these requirements. The requirements also include the terms of reference for the governance of the project.

Comment: The development of an online registration system is specifically excluded from the scope of this project, and no provisions need to be made for the incorporation of such a system. Should a registration system be implemented subsequently, the Society website would likely be transferred to a different hosting service.

Authority and Terms of Reference

The authority, accountability, and assignment of duties for the website improvement and registration system were established by the following motions at the Annual General Meeting of the Society on November 22, 2006.

Moved by Ron Baker and seconded by Neal Ross: That the Officers be authorized to make improvements to the Society web site to accommodate a repository of proceedings from previous seminars, and to accommodate an automated seminar registration system, and to expend therefore no more than \$1,500, this amount to be recovered through a levy on seminar registration fees in 2007.

Carried.

Moved by Susan Read and seconded by Carol Brien: That Peter Mulholland be appointed the Project Manager for the development of the repository, and Web Site Publisher through June 2007, and in these capacities accountable to the Registrar of the Society..

Carried.

Moved by Oleg Perepelkin and seconded by Stephen Forrest: That Joan Hambury be appointed Project Manger for the development of the registration system, and in this capacity accountable to the president of the Society.

Carried.

Project Governance

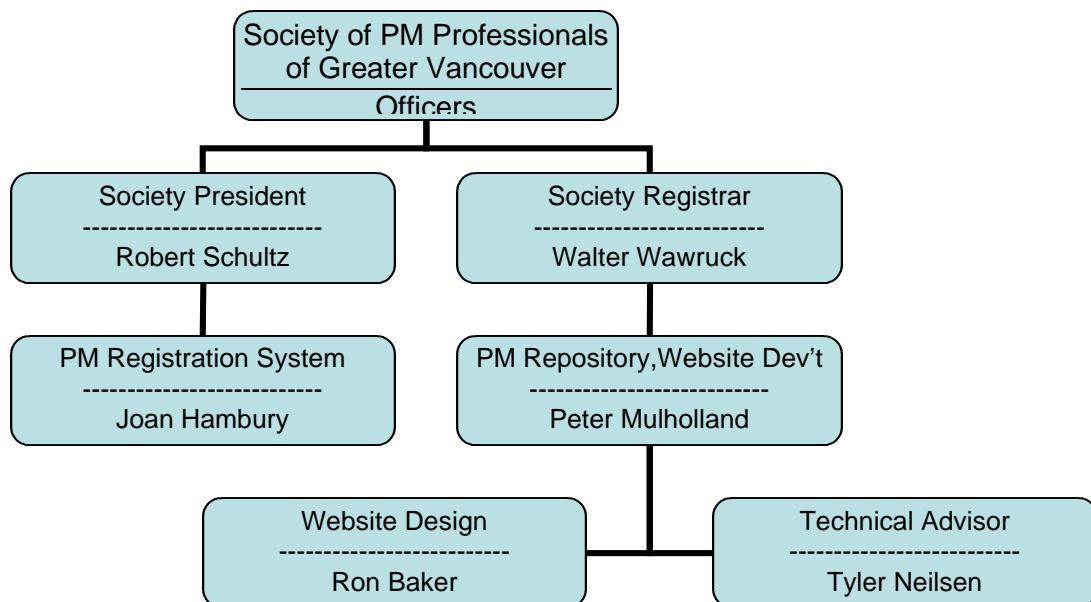
Stages and Milestones

The Website Upgrade project shall be carried out using a stage-gate process. The results of the project work shall be reviewed with the responsible Officer at the conclusion of each stage. No further work shall be initiated until authorization to proceed is specifically given. The decision to make financial commitments will require the consent of the three Officers.

The stages, and the milestones which mark the conclusion of each stage, are:

1. Compilation of requirements and agreement on requirements.
2. Investigation of specific design and implementation alternatives; and agreement on recommended alternative; approval of any financial commitments.
3. Development and implementation of agreed alternative, and successful acceptance test of results
4. Start-up, training of the Website Publisher, and the hand over of the functioning site to operations.

Organization



Communications

| Communication | Responsibility | Recipient | Frequency |
|-------------------------------------------------------|-------------------------------------------------|-----------------------------------------------------------------------|-------------|
| Registration Project Status Update | Joan Hambury, Reporting to Robert Schulz | Robert Schulz Walter Wawruck* Peter Mulholland* Gary Murphy* | Monthly |
| Website, Repository, Online Governance Status Updates | Peter Mulholland Reporting to Walter Wawruck | Walter Wawruck Robert Schultz* Joan Hambury* Gary Murphy* | Monthly |
| Overall Projects Update | Robert Schultz | Society Members | As Required |

* For Information

Project Budget and Schedule

The total development budget of \$1500.00 is intended to cover all costs for both the website upgrade and the registration system projects, including the \$410 already committed for the BCIT Students. Financial commitments shall be made only with the consent of the Officers in accordance with the stage-gate process as described above

The target completion date for the Website Upgrade project, assigned to Peter Mulholland, shall be June 30, 2007.

Site Organization and Content

This section sets out the detailed requirements for additions to the content of the existing site and a reorganization of the pages on the site.

The site shall be organized as a series of web pages, inter-linked primarily in a hierarchical structure. Each page shall be divided into two panels.

- One panel shall be an index of the levels of subdivision leading to the current page on display. The index shall consist of links to the referenced pages
- The second panel shall be the current page on display.

This structure is illustrated in the sample web pages contained in the October 16, 2006 file “PM Professionals Web Site.ppt”. The samples are intended to portray structure only, and are not a specification of required content. The Society logo shall be shown on each page, either as part of the navigation panel or as a separate header.

The “look” of the site shall be comparable to that of the current site in matters of colour, font, and the Society logo. The current site is www.vcn.bc.ca/pmprof. The designers shall prepare a standard for web page styles and formats which is faithful to the current “look” of Society documents, but which also gives consideration to readability. The standard will be reviewed for acceptance by the Registrar at Milestone 2.

Comment: The users served by the site and the information with which they will be provided are:

1. The general public - information about the aims of the Society, its constitution, and Officers
2. PM practitioners in general and PMPs in particular – information about opportunities for participation in the professional development program: about the re-certification process; and about the technical programs of previous PD seminars.
3. PM practitioners in general – technical information that may be contained in the presentation outlines and workshop outputs from previous PD seminars.
4. Society members – information on membership, the constitution, and the minutes of annual meetings.

The notice which is broadcast to the distribution list is the vehicle for publicizing PD seminars or for soliciting registrations. The website shall not be expected to perform this role.

All pages of the site will be viewable by the public with free access to download documents and content. Uploading documents to the website and making page/content changes will only be done only by the Website Publisher or the Publisher’s designate via a secure mechanism.

The updated website shall contain all of the items available in the existing website. In addition to the items which are currently posted on the existing website, provision shall be made for posting the following items or making them available for download from the site:

Templates for the use of seminar management teams, including:

- the seminar management manual
- standard hotel contract and food order
- registration templates
- evaluation report
- completion report

Description of the annual program of planned PD seminars

Instructions on how to propose and organize an additional PD seminar

Links to PMI website for more information on re-certification and for on-line posting of PDUs.

These content items shall be obtained from the Officers of the Society. Preparing the content is not within the scope of the Website Upgrade project.

Intermediate Deliverables

At milestone 2, the following items shall be provided for review:

Design standards, including web page formats and styles, file naming conventions, and the structure of directories and sub-directories within the site.

A listing of all web pages to be produced, described by title and organized by hierarchic relationship. For the repository, this listing shall include only the high level introductory page and the summary of downloads page. See the separate requirements for the repository in the next section.

A website prototype consisting of illustrative screen images for web pages at each level of the hierarchy, and including links which demonstrate the transitions among pages. The prototype shall also include illustrative document downloads and links to external sites, such as PMI. For the repository, the prototype shall include illustrative web pages for one PD seminar and a model for the summary of downloads page. The demonstration prototype does not need to be uploaded to the website server.

Requests for financial authorizations if any expenditures are need to complete the development.

At milestone 3, the completed, upgraded website, including web page files and files for download, shall be provided for review, and for acceptance by the Registrar. At this point

the website shall be integrated and fully functional in accordance with these requirements. This means that the repository of seminar proceedings shall be a functional and integrated component; however, the repository contents may not be fully entered by the date of this milestone. See the separate requirements for the repository in the next section.

Testing and Acceptance

The individual web pages shall be independently reviewed for errors and omissions by a person other than the authors. The reviewer shall check for compliance with these requirements and for fidelity to the source documents. The reviewer shall proofread the contents of the delivered pages for typographic, spelling, and formatting errors. All links to other web pages shall be tested in the course of integration testing. Document links shall be verified by confirming that the target files have been correctly identified in the HTML code. The reviewer will provide a certificate confirming that the review has been performed and that all discovered deficiencies have been corrected, with specific reference to individual web pages.

The project manager shall prepare and submit a completion report listing all of the delivered items and services associated with this section of the requirements. All of the files for the integrated website, including those for the repository, together with the reviewer's certificates, shall accompany the completion report. The sign off by the Registrar on the completion report shall certify acceptance of the integrated website as developed.

Archive and Repository of Documents

This section sets out the detailed requirements for a repository of abstracts, biographies, and presentations, and workshop outputs for all PD seminars conducted to date.

Comment: Since the Society must maintain an archive as a duty of prudent governance, it is convenient to use the website as the archive. This has the advantage of providing access to the archive for the members and for the public. The existing site contains an archive of (or at least offers access to) governance documents (constitution, minutes, list of members) and notices previously broadcast. It is now planned to include at least abstracts and biographies for PD seminar presentations.

The primary structure of the repository shall be a linked hierarchy, organized as follows:

Summary level: A list of all PD seminars conducted to date, in reverse chronological order. Each item will be a link to a page at the detail level.

Detail level. A single web page for each PD seminar, starting with a list of all presentations and workshops which were delivered. Each item in the list shall be a link to a section below on the page containing an abstract of the presentation or workshop and a biography and contact information for the presenter or leader. Following the abstract shall be a listing of presentation outlines or workshop

outputs, if they are available. The items in the list shall be links to documents so that the documents may be downloaded. Downloadable documents shall be in PDF, DOC, PPT file formats only.

The detail level page is illustrated in the sample web page contained in the February 28, 2007 file “Abstracts.html”. The sample is intended to portray the principle only, and is not a specification of required content. The sample portrays more than on PD day on a web page and does not include a listing of files containing documents for download.

As a supplement to the primary structure, there shall be a summary of downloads page. This web page shall contain an alphabetical list by title of all of the presentation outlines or workshop outputs available for download . Each item in the list shall be a link to the abstract with which the item is associated.

Before making any seminar proceeding available for download, the consent of the author shall be obtained. Similarly, consent must be obtained before any person’s e-mail address is posted on the site

The following agreement shall be prominently displayed on the web pages where documents containing seminar proceedings are available for download:

“By using or downloading any material from this site, I agree that the material shall be for my personal use only and shall not be reproduced for other parties, without the consent of the author”

An interactive search capability is not required.

Intermediate Deliverables

At milestone 2, the following items shall be provided for review:

A listing of all web pages to be produced for the repository, described by title and organized by hierarchic relationship.

Illustrative screen images for web pages at each level of the hierarchy in the repository, including links which demonstrate the transitions among pages. These pages shall be integrated in the website prototype. See the requirements for the website structure and content in the preceding section.

Requests for financial authorizations if any expenditures are need to complete the development of the repository.

At milestone 3, the aim is to have the repository completed, up to and including the most recent PD seminar. However, there may be delays due to incomplete information, outstanding permissions, or lack of resources. In such a case, priority shall be given to completing the most recent seminars. The repository shall first be developed and tested as a separate module, comprising the seminars posted to date. At that time, a report shall be

prepared to inventory the missing information and missing web pages needed to complete the repository. Then the repository module shall be integrated with the overarching website for integration testing and acceptance. See the separate requirements for the entire website in the preceding section.

As additional seminars are subsequently posted to the repository, the additional and changed web pages shall be individually tested and integrated.

Testing and Acceptance

The individual web pages in the repository module shall be independently reviewed for errors and omissions by a person other than the authors. The reviewer shall check for compliance with these requirements and for fidelity to the source documents. The reviewer shall proofread the contents of the delivered pages for typographic, spelling, and formatting errors. All links to other web pages shall be tested in the course of testing the repository module. Document links shall be verified by confirming that the target files have been correctly identified in the HTML code. The reviewer will provide a certificate which makes specific reference to individual web pages, confirming that the review has been performed and that all discovered deficiencies have been corrected.

No separate completion report shall be required for the repository module. The listing of the delivered items and services associated with this section of the requirements shall be incorporated in the completion report for the website, as set out in the preceding section. The report shall contain an inventory of missing information and missing web pages which are needed to complete the repository.

Website Hosting

This section sets out the detailed requirements for the web hosting service which shall be secured through the project.

The site shall have adequate capacity to support the website through 2012

Comment: Our storage requirements for the repository of seminar proceedings will likely be the largest single demand for storage. Currently averaging about 4 MB per seminar, we can conservatively project a need for 300MB by year 2012.

The current hosting arrangement with Vancouver Community Network (VCN) shall be continued unless there is information that it may have inadequate capacity.

Comment: In a visit to the VCN help desk on February 27, 2007, we were advised that there should be no problem in granting us up to 300 MB of storage, and that we could safely proceed on the assumption that it will be available. Our current hosting fee is \$75 per year. All payments to VCN are voluntary and are considered to be donations. The help desk advised that any additional fee we pay for more capacity would be up to us (i.e.: voluntary) I suggest that following the upgrade we increase our annual contribution to \$125 per year, which would put us in the range of current commercial fees.

A dedicated domain name and URL are not required.

Comment: A secure space on another website, similar to the one we now have, is satisfactory and eliminates the administrative duty of renewing the domain name.

Acceptance

No separate completion report shall be required for the hosting service arrangements. The project manager shall obtain a written confirmation from VCN that we will have access to adequate storage capacity. This confirmation may take the form of an e-mail message and shall be incorporated in the operating manual. See the requirements and acceptance process for the operating manual below.

Operating Plan and Start-up

This section sets out the detailed requirements for the plan for the continued operation and maintenance of the website.

Comment: A key aim in establishing the Society was to focus the energy of the volunteer officers and seminar management teams on the delivery of professional development programs, and to have as little as possible administrative overhead. This means there should be a minimum of non-educational duties for the officers, and a minimum expenditure for such items. The establishment and maintenance of a website is such a non-educational item, and is not part of the core mission of the Society. The guiding philosophy for website operations therefor is to make design and content choices which minimize the subsequent effort to maintain and operate the site.

An operating plan for the website shall be prepared and recommended to the Officers. The plan shall be in the form of an operating manual which identifies all operations activities. The manual shall be written so that any Society member (i.e.: not a programmer) can follow the instructions, and can understand clearly when to perform them and where information needs to be stored. A copy of the manual shall be included on the website and in the back-up records.

The manual shall address the following items:

Website publishing and maintenance duties. A comprehensive list of the duties which must be carried out on an annual cycle.

Organization and responsibilities. The maintenance of the existing website is currently carried out by the Registrar of the Society. An analysis shall be made of the need for a website publisher as a separate role, and if needed the manual shall specify the qualifications and the reporting relationships for the role. Transition steps required to hand over from one website publisher (administrator or operator) to another shall be specified.

Configuration and change control. The manual shall describe the authority and the procedure for amending either the configuration or the contents of the website. Any changes to the website or uploading of any documents is a responsibility of the Website Publisher only, or the publisher's designate.

Backup and recovery.

Administration of the contract with the website hosting service.

In addition to the Operating Manual, addenda to the Seminar Management Manual shall be prepared to describe any duties that a Seminar Project Manager may have in connection with the operation of the web site. Such additional duties may include using the website as the source for templates, soliciting permission to post presentation materials, and providing data from the seminar for posting in the archives.

Operations training shall be provided to the site operator or Web Publisher. The training, between milestones 3 and 4, shall include a guided rehearsal of the process for making updates and modifications to the pages on the site, including the development and integration of additional web pages in the repository.

If it is determined that a separate person is required for the role of Web Publisher, a candidate shall be recruited for the second half of 2007. If not, the Registrar of the Society shall perform that role for the purpose of operations training.

Intermediate Deliverables

The deliverable items to be provided for review at milestone 2, the completion of the design stage, shall consist of the table of contents for the operating manual and a recommendation on the need for a website publisher as a separate person

At milestone 3, the completed operating manual shall be delivered and the person who will be Web Publisher following hand over shall be identified. Milestone 4 shall be the hand over to the Web Publisher and the termination of the project manager's duties.

Testing and Acceptance

The operating manual, and the operating instructions which are to be incorporated in other documents, shall be independently reviewed for errors and omissions by a person other than the authors of the contents. The reviewer shall check for compliance with these requirements and for technical correctness. The reviewer shall proofread the contents of the delivered documents. The reviewer will provide a certificate confirming that the review has been performed and that all discovered deficiencies have been corrected.

The project manager shall prepare and submit a completion report listing all of the delivered items and services associated with this section of the requirements. The operating manual and other operating instructions, together with the reviewer's

certificate, shall accompany the completion report. The sign off by the Registrar on the completion report shall certify acceptance of this section of the project..

Referenced Documents and Sites

The following files are referenced in the preceding requirements and form part of the requirements:

Abstracts.html, 28-02-2007 , an illustrative sample of a web page in the repository.

PM Professionals Web Site.ppt, 16-10-2006, an illustrative sample of a two-panel web page structure.

The current web address for the Society website: www.vcn,bc.ca/pmprof

Revision History

Revision 5

Incorporating comments by Peter Mulholland and Gary Murphy, March 11, 2007. The Appendix is an addition. Other changes since Rev. 4 are marked with a left hand border on the paragraph.

Revision 4

Consolidated and reorganized by Walter Wawruck March 5, 2007

Revision 3

Additions by Joan Hambury, Gary Murphy, Walter Wawruck, Peter Mulholland February 20, 2007, using MS Word “Track Changes” function

Revision 2

Additions by Walter Wawruck
January 31, 2007, highlighted in yellow

Appendix: Summary of Project Deliverables

This list is a summary of the deliverable items more fully specified in the preceding specification of requirements, and does not replace or amend the specification.

Milestone 1

Requirements

- 1.1 Compilation/Agreement on Requirements (Website, Repository, Web Hosting, Operations)

Milestone 2

Website

- 2.1 Design standards.
- 2.2 Hierarchic listing of all web pages
- 2.3 Website prototype
- 2.4 Requests for financial authorizations for Stage 3 Website development

Repository

- 2.5 Hierarchic listing of all web pages
- 2.6 Illustrative screen images for each kind of web page
- 2.7 Requests for financial authorizations for Stage 3 Repository development

Operations

- 2.8 Operating Manual Table of Contents
- 2.9 Website Publisher Recommendation

Website Hosting

- 2.10 Written confirmation from Vancouver Community Network of adequate storage capacity.

Milestone 3

Website

- 3.1 Website completed, available for review
- 3.2 Reviewer's Certificate received for testing & acceptance.
- 3.3 Project Completion Report

Repository

- 3.4 Repository completed, including most recent PD seminar, save for missing information.
- 3.5 Repository integrated with Website for testing
- 3.6 Reviewer's Certificate received for separate module testing & acceptance.
- 3.7 Inventory Report of missing information and web pages
- 3.8 Deliverables incorporated into Website Completion Report

Operations

- 3.9 Operating Manual Completed
 - Website publishing and maintenance duties
 - Organization and responsibilities
 - Transition steps for Website Publisher hand over
 - Configuration and Change Control
 - Backup and recovery.
 - Contract Administration with Website Host
- 3.10 Website Publisher identified
- 3.11 Addenda to Seminar Mgmt Manual for Seminar PM Website Operations duties
- 3.12 Operations training for Website operator or Web Publisher.
- 3.13 Reviewer’s Certificate received for Operating Manual
- 3.14 Completion Report for Operations

Milestone 4

Start-Up

- 4.1 Training provided for Website Publisher
- 4.2 Hand over of the functioning Website to operations.