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| Business Requirements |
| Communications, Collaboration and Information Sharing |

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| Julie Kothlow  September 23, 2010 |

Document Revision History

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# Introduction

## Project Background

The methods by which UBC IT communicates internally and externally with stakeholders has become ineffective, inefficient and inconsistent. We currently use email as our core way of communicating information, providing either attachments or links to other documents or information required. In addition, the tools we currently use are outdated versions (SharePoint 2003), disparate (Confluence) and are not configured or architected or supported to enhance operability, findability and usability of information.

Key drivers for this project include:

* Employee dissatisfaction with the existing intranet (Sharepoint), confirmed through ITSAW and feedback given in the Intranet Survey in 2009
* No way to be able to easily communicate and collaborate with the IT community and with our stakeholders in a way they want us to communicate or in a consolidated way (e.g. not having to go to multiple locations to access and find the information they require)
* There is no clear ownership for communication in the organization. It is shared across multiple groups including Communications and Collaboration with ongoing responsibility for content is supplied from various departments and consumed by the entire organization. The governance structure will be a key component of the business requirements
* Collaboration and Social Network Tools have improved considerably in the last several years. Users have also become more sophisticated through the use of public and social media sites such as Facebook and Twitter. Other features such as RSS news feeds and alerts keep people current with information, and wikis and blogs allow everyone to contribute and become contributors and editors (not just consumers) of content. These types of tools have changed the way people view and work with information and need to be evaluated to determine if they are in alignment and effective for use within UBC IT to achieve its communication objectives.
* Not accessable by all UBC IT staff from anywhere at anytime

## Purpose of the Business Requirements

The purpose of the business requirements is to be clear about what our requirements are, then source appropriate solutions which will in turn meet those needs. Our business requirements will identify:

* Who we communicate and collaborate with (internal to UBC IT, IT @ UBC, UBC IT’s stakeholders)
* What we communicate about and what we need to collaborate about
* When or how often do we need to communicate or collaborate
* What information we need to access in a quick and effective way (usability, findability)

## Business Goals/Objectives to be Achieved

Communication

* Strengthen workplace community
* reduce unnecessary redundancy and streamline communications
* reduce amount of email
* increase pull rather than push messaging
* increase meeting effectiveness, greater clarity on mandate and objectives
* provide the ability for people to customize communications based on preferences
* improve ability to communicate crisis situations and provide real time updates

Information management

* simplify permission/security measure criteria on information and documents
* make it easier to find and access information (for UBC IT and beyond)
* increase accuracy
* Capture business knowledge and support knowledge sharing

Collaboration

* improve look and feel, increase consistency in both language, messaging and content in tools
* Increase interactivity, two way communication and engagement with our staff, partners and stakeholders
* increase timeliness of information
* increase self-publishing capabilities so content will be updated more completely, frequently and consistently (leading to a more informed and engaged workforce)

Cultural

* change the way we think about digital information as no longer just what we do with it and use it, but rather how we can share and collaborate using it
* as the first “go to” place for information at UBC IT

## Benefits and Rationale

The benefit of this project is to allow greater opportunities for UBC IT staff and IT @ UBC to collaborate thus facilitating the creation of an IT community of practice. In addition, UBC IT has recently created a Client Services Group focusing on the needs of UBC’s faculties and administrative departments. Having a shared collaboration tool will allow us to freely collaborate between groups without relying solely on voice and email which is over-used and ineffective.

This project will also define governance structure which will help to clarify roles and responsibilities with respect to who is responsible for all types of communication; and also who is responsible for the ongoing maintenance and usability of the collaboration tool(s) we select. Having this structure in place will aid in the ongoing relevance and sustainability of these tools.

## Stakeholders

UBC IT’s stakeholders are defined as individuals or groups that we communicate, collaborate or share information with. These include:

* Product/Service End Users such as students and staff
* System/Network Administrators who are technicians who reside in departments and they provide departmental IT support. UBC IT provides services to these groups. They may also seek IT services from external vendors outside UBC.
* IT at UBC which includes the IT organizations which are distributed throughout the faculties and administration groups and are not part of UBC IT. These are groups who are typically focused on the specific needs of their faculties and departments.
* Office Administrators who are non-technical who typically are the go-between UBC IT and their faculty or administrative group. May contact UBC IT for service issues or to seek new products
* Deans and Department Heads who have a vested interest in ensuring IT services within their respective areas are effectively and efficiently meeting their needs and that UBC IT is providing the technical leadership they require
* Enterprise Customers are larger customers who are responsible for enterprise systems such as Finance, Student Systems and Presidents Office.

UBC IT’s objective is to have a closer relationship with stakeholders in understanding what their business and technology requirements are and how best to fulfill them, as well as providing expertise and support in managing their current technology services provided by UBC IT.

## Assumptions

Other operational support systems which are used to manage daily activities such as an Incident Reporting System, Problem Tracking, Project Management systems, Financial and HR systems would remainout of scope while retaining their own data repositories. This project will consider access to these systems through links and searches, not through hard coded integration.

## Constraints

It is important that any tools selected be compatible with other toolsets currently in use. UBC IT is in the process of testing Microsoft’s Unified Messaging product. In addition with likely budgetary constraints on implementation, SharePoint will be our first go-to application for review as we have a campus agreement for Microsoft’s Office Suite which could apply.

## Dependencies

It is assumed that EAD will be in place by the time we get to implementing any systems or tools selected. Any provisioning and deprovisioning of users must be able to take place outside a specific tool or application.

# Requirements Scope

## In Scope

These business requirements will likely result in recommendations for the following processes and solutions:

* Intranet and associated Governance Structure
* Unified Messaging (in the process of being tested)
* Communication Strategy/Plan
* Standardized Meeting structures – agendas and ways to engage remotely
* Relationship Management – primarily for Client Service interaction with our Stakeholder community, but also could be used beyond.
* Student Hub (currently in progress)

## Out of Scope

This project is not looking at any knowledge management tools/applications. Any knowledge management relating to incidents would be contained in an Incident Management System.

# Business Requirements

## Current State

This diagram is intended to be illustrative and only represents the major systems and tools used by UBC IT. There are many more ancilliary system and tools that are not represented due to their size and limited use. (note: this diagram will be updated as business requirements are being finalized)



# Functional Requirements

## Ranking System

|  |  |
| --- | --- |
| **Rank** | **Explanation** |
| H | (High) Mission Critical Requirement – are requirements that are mission critical, necessary for the operation and without them the organization could not function; they also include important internal and external reporting requirements |
| M | (Medium) High Value Add Requirement – are requirements that, if met, would significantly improve the organization’s business operations or processes |
| L | (Low) Desirable Requirement – are requirements that are nice to have and would add minor value to the organization’s business processes and may be met through workarounds or changes to business processes |

## UBC IT Requirements Listing

1. **Communication**

The requirements identified for communications can be grouped into three distinct requirements:

1. The ***contextual integration*** of communication services within business activities. This means that the user experience in which relevant conversations and messages are easily available because they are blended within task-based interfaces rather than supplied in separate applications
2. Enabling ***situational awareness*** across people and information within those activities. The use of presence information to control interruptions and to communicate with others over the most appropriate channel at the time
3. Delivering ***seamless transition*** across applications and platforms. The ability to roam from one application, device or platform to another – across borders – while retaining situational awareness.

Specific Requirements include:

|  |  |  |
| --- | --- | --- |
| **#** | **Description** | **Priority** |
| 1.1 | Need to be able to thread or tie patterned information together, potentially across media (documents, emails etc.) by topic | H |
| 1.2 | Ability to provide feedback on all types of communication | H |
| 1.3 | Ability to push and pull communications | H |
| 1.4 | Ability to use email for alerts, notifications and subscribe/unsubscribe capabilities and be able to escalate | H |
| 1.5 | Different ways to communicate and collaborate which is both real time and recorded using different media types such as teleconference, videoconference, SIP based, webex type tool, recorded video. Need tools to attend, provide feedback and contribute to meetings in an electronic way (when you are not able to attend in person) | H |
| 1.6 | Instant messaging capabilities | H |
| 1.7 | Ability to assign a workflow to a specific type of content or communication which allows for editing before publishing. Also allows for self-publishing without editing. | H |
| 1.8 | Ability to have a shared view of UBC event calendars such as academic and business calendar for scheduling projects, holidays, outages to understand impacts on other activities. Ability to have a shared view of all staff calendars to see when someone is available. | H |
| 1.9 | Ability to create distribution lists based on roles, responsibilities, names or self-subscription methods. | H |
| 1.10 | Easy access, creation and publishing to social networks which are both public (facebook, twitter) and internal (blogs, forums, chats) | M |
| 1.11 | Ability to opt in or out of communications except mandatory communications | M |
| 1.12 | Ability to receive an alert when new IT employment opportunities are created (from eRecruit – Peoplesoft) | M |

1. **Content Management**

|  |  |  |
| --- | --- | --- |
| 2.1 | Integrated authoring environment which allows content creators to have easy access to the full range of features including read, write, edit, permission setting capabilities | H |
| 2.2 | Ability to provide feedback on all types of content | H |
| 2.3 | Must allow for many simultaneous users. Features such as record locking ensuring clashing changes are prevented | H |
| 2.4 | Versioning Control and Archiving – ability to identify the current production document to ensure that multiple copies and versions do not exist. Tracked through effective versioning which identifies who edited the document and when. Effective records management including the ability to identify stale or aging documents based on date criteria; ability to archive older documents and make them easily accessible and searchable | H |
| 2.5 | A way of displaying and accessing information of critical importance quickly (e.g. procedures for emergencies) | H |
| 2.6 | Ability to generate a wide variety of reports for both System/Tool Administrators and users. Web analytics capability to better manage content. Support for customized reporting is also desirable | H |
| 2.7 | Ability to suggest tags based on content. Ability to identify location of documents with similar tags to guide content placement | H |
| 2.8 | Ability to email documents to a collaboration tool | M |
| 2.9 | Have quick links to commonly used information such as the phone book | M |
| 2.10 | Ability to handle rich content such as formatting for specific media types including text, audio and video | M |
| 2.11 | Wiki functionality | M |
| 2.12 | Ability to stream media and have RSS feeds | M |

1. **Views, Presentation**

|  |  |  |
| --- | --- | --- |
| 3.1 | Ability to create style sheets and page templates for easy publishing | H |
| 3.2 | Ability to support multiple formats including HTML, printed, PDF etc. | H |
| 3.3 | Ability for staff to have their own home page where their profile, picture, skills and relationships can be found/searched. Ability to add “social media” type information if staff wanted to which could be private or public selectable – this may be personal blogs, photos, hobbies, interests etc. (for increased employee engagement purposes and easy access to subject matter experts) | H |
| 3.4 | Must be viewable in all major browsers including explorer, firefox, opera, safari, chrome | H |
| 3.5 | Ability to personalize so that different information is presented based on either user profiles, or metadata in source content. | M |

1. **Usability**

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| --- | --- | --- |
| 4.1 | Information hierarchy should be easy to follow, simple, easy to set up and configure | H |
| 4.2 | One person may span support, development, project and envisioning. CCIS should be able to cross over organizational boundaries in displaying, finding and managing information | H |
| 4.3 | Ease of use, learn-ability and efficiency   * Intuitive to use, can learn in 15-30 minutes * Instructions are easy to follow * Good user interface and information architecture * Easy to create, search and maintain content | H |

1. **Findability, Search**

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| --- | --- | --- |
| 5.1 | Ability to pose a question and receive results from a search through an intelligent search engine. Able to search in a number of ways – not just through hierarchical folders, but tags, key words, content and posing a question | H |
| 5.2 | Searchable FAQ’s | H |
| 5.3 | Search for experts – profiles for staff which includes skills, capabilities and know who to go to for answers to questions or who to collaborate with on issues. Would like to see relationships (reporting structures, group memberships). See also 3.3 | H |
| 5.4 | Able to search easily and return results (self learning). And the ability to rate quality of results returned | H |
| 5.5 | Ability to capture metadata (creator, subject, keywords, keyword indexes, subject taxonomies and topic maps). Ability to link and tag information | H |
| 5.6 | Enterprise search across tools & repositories. Ability to tier searches from broad to narrow. Ability to search within compartments and broader (e.g. within UBC IT, IT at UBC or UBC wide) Could also be based on technology (e.g. sharepoint or trouble ticketing across UBC) | H |
| 5.7 | Need to be able to find information based on content, not just by department or organizational structure | H |
| 5.8 | Able to search on words within multi-media documents | L |

1. **Access and Security**

|  |  |  |
| --- | --- | --- |
| 6.1 | need to communicate, collaborate and share information with people who telecommute or are at various physical locations outside UBC | H |
| 6.2 | need to be able to communicate, collaborate and share information through internet, video conference or teleconferencing capabilities | H |
| 6.3 | Person contributing information or designate should have control over the security and permissions | H |
| 6.4 | Be able to set permissions on documents or folders (read only, edit, assign permissions based on individual users) | H |
| 6.5 | Ability to differentiate information we make public to our customers versus information which we share internally which is private | H |
| 6.6 | Ability to assign various levels of security and permissions associated with different types of content. | H |

1. **Integration**

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| --- | --- | --- |
| 7.1 | Need to load and/or convert existing documents and information found in existing “knowledge bases” | H |
| 7.2 | Need to communicate with stakeholders that may have a variety of tools they use such as basecamp etc. | M |

1. **Governance (process, roles)**

|  |  |  |
| --- | --- | --- |
| 8.1 | Governance – metadata should appear in each field for standardization | H |
| 8.2 | Governance framework should provide direction on where documents should be stored, have clear ownership for the management of information (multiple people may own different/same documents), how to use the tool. Should include appropriate level of empowerment based on users or groups | H |
| 8.3 | Method for addressing feedback with actionable items (process) | H |
| 8.4 | Need business owners for all systems/tools selected. Need to identify communication and content owners | H |
| 8.5 | Need for better collaboration during new product/service introductions and CAB | H |
| 8.6 | Need to address proper lifecycle management in any tool selection, and determine which tools will be consolidated, retired as a result of | H |
| 8.7 | Need to have a better Orientation for new employees which includes how to access people, information and who to go or collaborate with (not just the HR stuff, but the stuff you need to know to do your job | H |
| 8.8 | Need to share success stories, storytelling for better staff engagement (type of content) | H |
| 8.9 | Need well documented decision trees and historical information on fixes, methodologies, templates (type of content) | H |
| 8.10 | Social networking should be used as a feedback process for addressing issues or providing comments on service. | H |
| 8.11 | Would like to see opportunities for social events, walk a mile in my shoes, open houses | H |
| 8.12 | Need centralized location for all people to access common information about statistics, KPI’s , reports that doesn’t reside in the various support tools (type of content) | M |
| 8.13 | Need to manage user expectations on communications | M |
| 8.14 | Need training for staff on   * Consistency of writing/messaging by type of message and audience * Using formal language for external and casual language for internal Standard formats for meeting agendas and facilitation | M |
| 8.15 | Would like to see overviews of groups and what they do (type of content) | M |

## Stakeholder Requirements

Stakeholder Requirements were collected from representatives of the following groups: System Administrators, Product/End-Users, Dean/Department Head, Office Administrators and Enterprise Customer. Two specific questions were asked including:

* What information from UBC IT is important to you and who should it be shared with?
* How would you like UBC IT to collaborate and share information with you? What do you currently rely on?

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| --- | --- |
| **#** | **Description** |
| 1.0 | Would like to see consolidated communications. Do not want to be inundated with multiple emails, but rather regular updates about what services are offered, pricing models, service level agreements which are available and terms and conditions. |
| 1.1 | As UBC IT taking the lead in the direction of technology, new initiatives, setting new policies, it is important to ensure there are opportunities for other groups to participate |
| 1.2 | Access to IT templates in a central library or repository for proposals, business cases, project templates so other groups can leverage what has been successful |
| 1.3 | Communication on outages which affect us are critical to know about asap with estimated times of recovery. Regular updates on progress should ensue. “If everything goes bad, we expect a phone call notification!” |
| 1.4 | Single point of contact for all services. Okay if need to be referred elsewhere, but one number to call to initiate |
| 1.5 | Need easier way to find information and who to contact, particularly if there are staff or role changes within the organization. The contact numbers shouldn’t change. Up to date current contact listing would be helpful |
| 1.6 | Inventory of institutional data: what is it how do you get access to it, is it archived, what is archived, what needs to be reported to official agencies.  There is a growing need for accountability within UBC, library organizations and government to be able to report on this. |
| 1.7 | Easy access to information in a way that is intuitive |
| 1.8 | Consultation for unit’s point of view on all issues impacting a unit is very much appreciated |
| 1.9 | Electronic communication and information sharing where possible (really would like to go paperless where possible) |
| 1.10 | Email alert (with a very short summary), preferably with a link to a UBC Intranet (where faculty/staff can access with a password) where I could get more details if I wanted to (wouldn’t want to be alerted every time a document is edited; may be checkpoints and delays; but if you’re in doubt, send it out) |
| 1.11 | Ability to provide feedback on a regular basis such as Focus Groups or Satisfaction Surveys |
| 1.12 | Would like to be able to pull status reports myself online (e.g. checking status of Exchange 2010) |
| 1.13 | Primarily in person for information sharing, planning, and collaborative efforts; including email notifications; online web access |
| 1.14 | All meetings could be more useful and productive by  combing information sharing with decision making and setting action items: “make something happen” |
| 1.15 | Everything in a place: units should be considered to be an extension of UBC IT so project artifacts, updates, etc should be available and most importantly these should have a consistent look across all projects, “everything is different” |
| 1.16 | Forums to be able to ask a question and get an answer from the broader group/community on technical issues |
| 1.17 | Tools that can provide various ways to do broadcasts, twitter, email, web sites but coming from the same information source for accuracy and consistency |
| 1.18 | Regular information updates (possibly monthly) on initiatives (new, updated, cancelled etc -- “status” possibly through a subscription or maybe a dashboard |
| 1.19 | More information on how the various committee structures fit together |
| 1.20 | Direct access to subject matter experts to assist with technical issues |
| 1.21 | Would like to see any opportunities where a consolidated effort would help to reduce costs in acquiring equipment, training or tools |
| 1.22 | Would like to see opportunities to share skills and mentor either formally (secondment) or informally (shadowing) |
| 1.23 | Would like to be able to subscribe to communications that are of interest to us |
| 1.24 | Would like to utilize other communication mechanisms such as wikis, blogs and forums |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **GENERAL** | | **SERVICE & SUPPORT** | | | | **PRODUCT INFORMATION** | | **WORKING TOGETHER** | | |
| **Groups we comm with** | **General contact info** | **Strategic information** | **Routine service information** | **Outage Notifications** | **IT Professionals Support** | **Escalation mechanisms** | **Product information (FAQ's)** | **Promotional Activities** | **Feedback Mechanisms** | **Knowledge Sharing** | **Collaboration** |
| **Product and Service End Users** | http://www.clipartguide.com/_small/0808-0710-2914-4646.jpg | N/A | http://www.clipartguide.com/_small/0808-0710-2914-4646.jpg | http://www.clipartguide.com/_small/0808-0710-2914-4646.jpg | http://www.clipartguide.com/_small/0808-0710-2914-4646.jpg | http://www.clipartguide.com/_small/0808-0710-2914-4646.jpg | http://www.clipartguide.com/_small/0808-0710-2914-4646.jpg | http://www.clipartguide.com/_small/0808-0710-2914-4646.jpg | http://www.clipartguide.com/_small/0808-0710-2914-4646.jpg | N/A | N/A |
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| **Office Admins (non-tech)** | http://www.clipartguide.com/_small/0808-0710-2914-4646.jpg | N/A | **X** | **X** | http://www.clipartguide.com/_small/0808-0710-2914-4646.jpg | http://www.clipartguide.com/_small/0808-0710-2914-4646.jpg | http://www.clipartguide.com/_small/0808-0710-2914-4646.jpg | **X** | **X** | N/A | **X** |
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| **Dept Heads** | N/A | **X** | N/A | N/A | N/A | http://www.clipartguide.com/_small/0808-0710-2914-4646.jpg | **http://www.clipartguide.com/_small/0808-0710-2914-4646.jpg** | **X** | **X** | N/A | **X** |
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## Personas

(to be completed by ADG as applicable)

## Use Cases

(to be completed by ADG as applicable)

## Information Architecture

(to be completed by ADG as applicable)

# Data Requirements

## Data Architecture

## Data Retention and Archiving

## Privacy Implications

# Operational Requirements

## Security Requirements

* Must be compliant with all University policies on privacy, intellectual property rights and protection of data.
* Must provision and de-provision identities/logins/accounts outside the application and conform to EAD (or IAM?)
* Must provide audit and log file analytics

## Infrastructure Requirements

* Must be compatible with the Vmware virtual server environment running on one of the supported OS’s
* Must be compatible with the virtual desktop deployment
* Must be useable from any device type supporting a standard web browser (or have a wide range of compatible device-type client software
* Must be using a supported data base environment (repository) capable of managing rich media types

## Integration Requirements

* Must integrate with the Identity Access Mgmt (EAD) initiative
* Must be able to access the ITIL document, policy, and procedure repositories
* Must offer integration services (common connectors and content API’s) to enable existing and future applications and databases to interoperate with the (CCIS) content and data repository (I suppose we could attempt to list some of these)
* Highly desirable to integrate with other “best-of-breed” tools (exposure of server-based metadata?)

## 

## Availability/Business Resumption Requirements

* Must be available within 5 to 15 minutes after any service disruption in order to support Network Operations Centre (or UBC IT) with the critical systems and application operational recovery information. (or must have 9999.99 availability?)
* Must be available from any location with wired or wireless service

## Capacity, Scalability and Performance Requirements

* Must be highly scalable with the addition of server and storage resources to provide the level of performance acceptable by an online user.
* Must mitigate performance penalties when working with documents over (via) the web

## Operate, Support and Use Requirements

Use

* Must be useable from any (most) user mobile device types for information query or read?
* Must be compatible with Linux, Mac OS, Win x86 client devices for information creation, update, read, query or deletion
* Must support “in-place” content edits
* Must support multiple people working simultaneously on a document

Operations/administration

* Must provide appropriate real time and log-based information to monitor the heath of the service
* Must provide web-based administrative screens
* Must provide statistics of how users navigate through the service and highly accessed content in order to improve (or tune or adapt) the service

## Vendor Requirements

# Approvals

The signatures below indicate acceptance of the Business Requirements as a true and complete representation of business and user requirements.

|  |  |  |
| --- | --- | --- |
| **Role** | **Name & Title** | **Date** |
| Executive Sponsor | Oliver Gruter Andrew |  |
| Key Stakeholders | Jennifer Burns  Michael Thorson  Tony Darling  Hugh Wallace  Liza Jose  Claudio Pini |  |
| Project Manager | Julie Kothlow |  |
| Usability Design | ADG |  |

# Appendices

## Appendix A: Glossary