OIMT meeting

* change ‘Share An Idea’ to ‘Share My Idea’
* change intro text
* inquiry button/help button – contact button
* Security – manage ideas – verification
* Your name (link to Downer address book)
* Or enter ‘Your Email’ if not Downer address group
* Murray will provide list of business units
* Murray will provide list of Locations
* Direct manager will need to link to Downer address book
* Change ‘direct manager’ to ‘Your manager’

‘Idea Details – complete the following as far as you’re able’

* Idea Title
* Idea Descr
* Est Benefits $
* Benefits (dropdown)
* Est of Cost $
* Types of Benefits (multiple selection) – will add more data
* Supporting documents

Thank you

* Murray will provide text

**Manage Ideas**

* security based on delegation
* Idea generator can come in view/edit their own idea
* Need Show Archived button

Idea Owner Details

* Flag if idea has been in same state for 30 days or more, (submitted\_period), add to top of review idea (today’s date minus date of submission)
* Status (Submitted)

Idea Details

* Need button at bottom ‘Commence Assessment’, this will change status to ‘Being Assessed’
* ‘Assess’ bubble only available after press ‘Commence Assessment’

Idea Assessment

* Need save button to add to history
* Need ‘send’ button
* Need file select to attach email responses
* Change select an assessment option to ‘Assessment complete – Select option’ – place in separate panel
* Depending button select change status – Share Idea = Shared, Progress Idea = Project Setup, File Idea = Archived
* Change button ‘File Idea’ to ‘Archive’
* When click ‘On Hold’, change status to ‘Assessed – On Hold’
* Move ‘Categorisation’ from ‘Project Setup’ to Assess Idea – Progress Idea, underneath comment box
* ‘Progress Idea’ should go to ‘Idea To Project’

**Idea To project**

* Idea To Project and Project Setup to be combined – remove ‘Idea To Project’ bubble
* After ‘End Date’ and before ‘Opex Req’, move ‘Expected Benefits $’ here, need same format as previous (dropdown description of benefit, and $ value – two fields)
* Opex and Capex (decimal field $ – not dropdown)
* ‘Energy Savings’ – need two fields like benefits (dropdown list, and unit (eg kW))
* Energy Savings need ‘Yes/No’ radio that will enable ‘Energy Savings’
* Between Capex and Energy Savings, need table for yearly Opex and Capex and Benefits in columns – ask if they want to split into different reporting periods (eg yearly, quarterly etc), need totals at bottom.
* In ‘Business Case’ need to be able to request further information before ‘Submit For Review’, remove from ‘Review Business Case’
* Status is still ‘Project Setup’
* Business Case Approve

**Project Setup**

* Status = Project Status

Execution

* Status = Business Case Approved
* Number of reporting fields dependent on the project categorisation from the business case. Eg don’t show Capex, Opex for small project (business rules)
* Benefits, Capex, Opex etc to be pre-populated based on business case data
* Two boxes per benefit same as previous forms
* Move assessment date above milestone checklist
* Any Corrective Actions required (Yes/No) & text field
* Milestones should be in separate panel at start of Execution eg ‘Project Milestone setup..’
* Change ‘Next Step’ header in Milestones table to ‘Step 1’, ‘Step 2’ etc…
* After assessment date and add assessment need ‘Next Step’ button, then ‘Next Step’ panel will be after ‘Update’ panel
* Combine ‘Next Step’ and ‘Risks’ together
* Need to make big button ‘Proceed To Completion’ instead of checkbox