

Project Name	OGE Progress Request Application
Document Author	Abhinav Pillai, Aurora White, James Wiley, Mahin Moon

Purpose (Standard Language – do not alter)

The purpose of Business Requirements is to capture the detailed requirements that describe the *needs of the business* with respect to a potential solution as they are derived from higher level objectives (i.e. the WHAT), and have those requirements approved by the project sponsor.

The Business Requirements document also serves the following purposes:

1. A central point to capture and record the requirements
2. A tool to communicate the requirements among all stakeholders
3. An approval point for project sponsors

Background (Required)

The following section details the context in which the solution lies. Include the project overview, risks, issues, assumptions, and dependencies. Additional sections may be added, as necessary, depending on the work being performed.

General Summary/Overview of Request

General Summary/Overview of Request; How did we get here?

Currently, all progression applications within OGE are handled on paper. This system is slow and ineffective since all signatures and approvals need to be physically transported, and all resulting data needs to be manually entered into their digital databases. OGE has decided that this system would be better handled digitally and has reached out to us to deliver their solution.

Describe what the outcome would look like for this request

Our app will replace the current paper requests and allow for quicker processing of promotion requests. This will also allow the required information to be added to OGE's digital database automatically, with instantaneous approval requests through workflow.

Project Goals and Objectives

The app will allow a supervisor to request promotions for their members. Within the app, they can fill out a request form for members they would like to request promotions for. The app will automatically handle the process for approving the request, from supervisors all the way to the vice president. All data added to this form will be auto populated into a digital database.

Risks, Assumptions, Issues and Dependencies (Required as applicable)

Risks

List any risks that may affect the successful execution of the Business Requirements, and identify contingency strategies for each risk. Also indicate relative ranking in Low/Medium/High for both the likelihood of occurrence and the impact if the risk is realized.

ID #	Risk	Probability (L/M/H)	Impact (L/M/H)	Mitigating Action	Identified By	Owner
R-1						

Assumptions

List any material assumptions that were made.

ID #	Assumption	Identified By
A-1		

Issues

List any issues which have occurred

ID #	Issue	Impact (L/M/H)	Plan to Address	Identified By	Owner
I-1					

Dependencies

ID #	Dependency	Owner
D-1		

Stakeholders

Stakeholders are persons or organizations who are actively involved in the project or whose interests may be positively or negatively affected by the performance or completion of the project. Stakeholders are not necessarily document contributors.

Name	Title	Project Role	Organization
Amit Kushwaha	Lead HR Information System Analyst	Sponsor	OGE Energy Corp.
Andrea Metcalf	Compensation Manager	Sponsor	OGE Energy Corp.
Kevin Jackson	Manager - HRIS Transformation	Sponsor	OGE Energy Corp.

Requirements

Guidance

We will use MoSCoW analysis when prioritizing requirements. MoSCoW divides requirements into four categories: Must, Should, Could, and Won't. These are to be used in the Priority for the Functional and Non-Functional Requirements.

Category Descriptions:

- **Must:** Describes a requirement that must be satisfied in the final solution for the solution to be considered successful in meeting the business need;
 - In effect, “must-haves” are requirements that would cause the business owner/sponsor to cancel the project if they cannot be delivered
- **Should:** Represents a high-priority item that should be included in the solution if possible, but lack of inclusion does not constitute solution failure.
 - “Should-have” requirements are candidates for trade-offs; if the delivery of a “should-have” would jeopardize the timely or cost-effective delivery of the “must-haves”, then it should likely be removed from the scope.
- **Could:** Describes a requirement which is considered desirable but not necessary. It will be included if time and resources permit.
- **Won't:** Represents a requirement that stakeholders have agreed will not be implemented in a given project or release, but may be considered for the future. Such requirements should be grouped in the “Out of Scope/Future Scope” section of the document.

Functional Requirements







Req. ID # <i>Required</i>	Functional Requirement <i>Required</i>	Author / Source <i>Who stated the requirement?</i> <i>Required</i>	Priority <i>(Must, Should, Could)</i> <i>Required</i>	Notes
1	-When the app is first opened, the user can see their open, denied, and accepted requests, as well as requests awaiting their approval.		Must	
2	-The promotion request form will show the name of the user that is currently logged in		Must	
3	-Request form includes a dropdown field for last annual performance rating with the options EE, ME, and NE		Must	
4	-Each non-progressed member on the request form includes a dropdown reason field with the option -performance concerns -behavior concerns -new to position -does not meet performance expectations for current role -other		Must	
5	-The grade fields on the request form have the numeric options 30-61 inclusive.		Must	
6	-The level fields on the request form have the options Associate, Staff, Senior, Lead/Specialist, Expert, I, II, III, IV, V, and VI		Must	
7	-The leader hierarchy will only have "name" as an input field. Title and email will be autofilled based on the employee sharepoint list.		Must	
8	-If there is an open form for an employee, a new one cannot be opened for the same employee.		Must	
10	-HR Ops has a unique field "adjusted pay suggestion" located on their approval screen.		Must	
11	-Whether opened from microsoft 365 or a link for approval, it will be possible to navigate to the homepage		Must	
12	-When a form is in the approve or deny mode, the information besides "approve or deny" and the comment text box are only viewable, not editable		Must	




Visualizations

Visualizations are used to more closely document what the end user is actually trying to achieve in terms of the appearance of a potential solution. These can be samples of screenshots, wireframes, report mock-ups, or other items that relate the users' vision.

Requests/Approval Overview Screen

A sample home screen for someone who is a supervisor and a higher leader, who submits requests and approves them.

OG+E		
Requests		Approval
<input type="text" value="Q Search"/>	All ▾	
 Saved	Aurora White 2/1/2022	>
 Pending HR	Jonathan Hanser 1/5/2022	>
 Denied by Jason Nations	Alex Bailey 2/1/2022	>
 Accepted	Jonah Lewis 10/28/2021	>
 Closed	Emma Stone 3/23/2022	>

OG+E		
Requests		Approval
<input type="text" value="Q Search"/>	All ▾	
 New	Avery Black 11/2/2020	>
 Saved	Jake Foster 12/15/2021	>
 Saved	Ray Cooper 2/21/2022	>

New Request Screen

A sample of the screen that the supervisors use to send new requests

EMPID	Name
546	Aurora White

Current Position Title	Grade
Data Analyst	27

Pay	Level
60,000	IV

New Position Title	Grade
Sr. Data Analyst	30

Pay	Level
80,000	VI

Date of last progression: N/A or 02/22/2022

Last Ann. Performance Rating: ME

Is this progression budgeted? Yes

If no, please explain how the cost will be covered in your budget:

Click or tap here to enter text.

Describe the business need for the progression and how the member meets this need (Include level of specialized knowledge, experience, expected short-term or long-term workload, and assessment of cost/risk associated with not proceeding with the progressions. Include mastery of member's current responsibilities, specialized knowledge, and current experience to meet the next level capabilities):

Our department is lacking the personal required to handle the increased volume of data we're receiving as our company grows.

List the minimum education and experience requirements for the next level (ref. job description):

- Highschool diploma
- 5 years as a data analyst

Does the member meet the minimum education and experience requirements for the next level?

yes Aurora has worked as a data analyst for us for 5 and a half years. They have a highschool diploma as well a bachelors in data science.

Non-Progressed Members

If you have other members in the same job family as the progressed member, eligible for progression but are not being progressed, list those member below and the reasons why they are not being considered for progression.

Name	Current Grade	Reason
Ben Jason	30	Other
Does not want to be progressed		
James Wilson	35	Behavior
Constantly Late		

Request Approval List

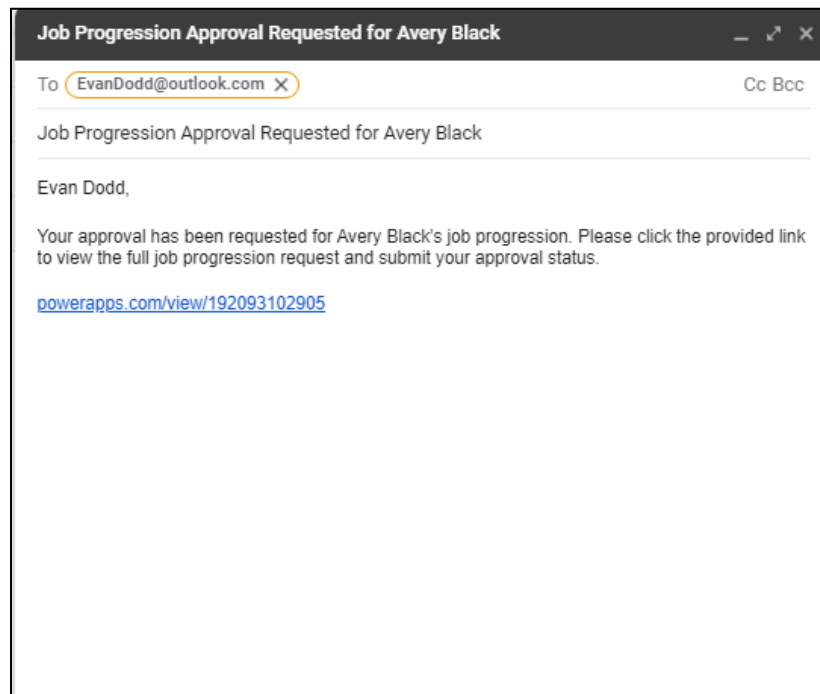
List the leaders required to approve this progression request, starting with the highest ranking leader. A maximum of five is allowed with a minimum of just the highest leader. Type in the name of the leader and their title and email will be automatically filled.

Leader	Title	Email
Ada Lovelace	BU	a.lace@outlook.com
Grace Hopper	Director	graceh@gmail.com
Margaret Hamilton	Manager	mararet.ham1@yahoo.com

Submit Request

Approval Request Email

A sample approval request email, sent to members of the approval hierarchy



Approval Screen

A sample of the screen leaders will use to deny/accept a specific request

←

OG+E

EMPID 673	Name Avery Black
Current Position Title Intern	Grade 20
Pay 30,000	Level I
New Position Title Engineer	Grade 21
Pay 50,000	Level II

Suggested Pay [Click or tap here to add text](#)

Date of last progression: N/A or

Last Ann. Performance Rating:

Is this progression budgeted? ☒ Yes ☐ No

If no, please explain how the cost will be covered in your budget:

Describe the business need for the progression and how the member meets this need *(Include level of specialized knowledge, experience, expected short-term or long-term workload, and assessment of cost/risk associated with not proceeding with the progressions. Include mastery of member's current responsibilities, specialized knowledge, and current experience to meet the next level capabilities):*

We need more engineers

List the minimum education and experience requirements for the next level *(ref. job description):*

Bachelors in Engineering

Does the member meet the minimum education and experience requirements for the next level?

☒ yes

Avery has this degree

Non-Progressed Members

If you have other members in the same job family as the progressed member, eligible for progression but are not being progressed, list those member below and the reasons why they are not being considered for progression.

Name	Current Grade	Reason
John Smith	22	Performance
Slow response time to outages		

Request Approval List

List the leaders required to approve this progression request, starting with the highest ranking leader. A maximum of five is allowed with a minimum of just the highest leader. Type in the name of the leader and their title and email will be automatically filled.

Leader	Title	Email
Evan Dodd	BU	evan.dodd@gmail.com
Jacob Gardner	Director	ggardner@outlook.com

Do you approve this progression request?

[Click or tap to add comments \(optional\)](#)

Accept

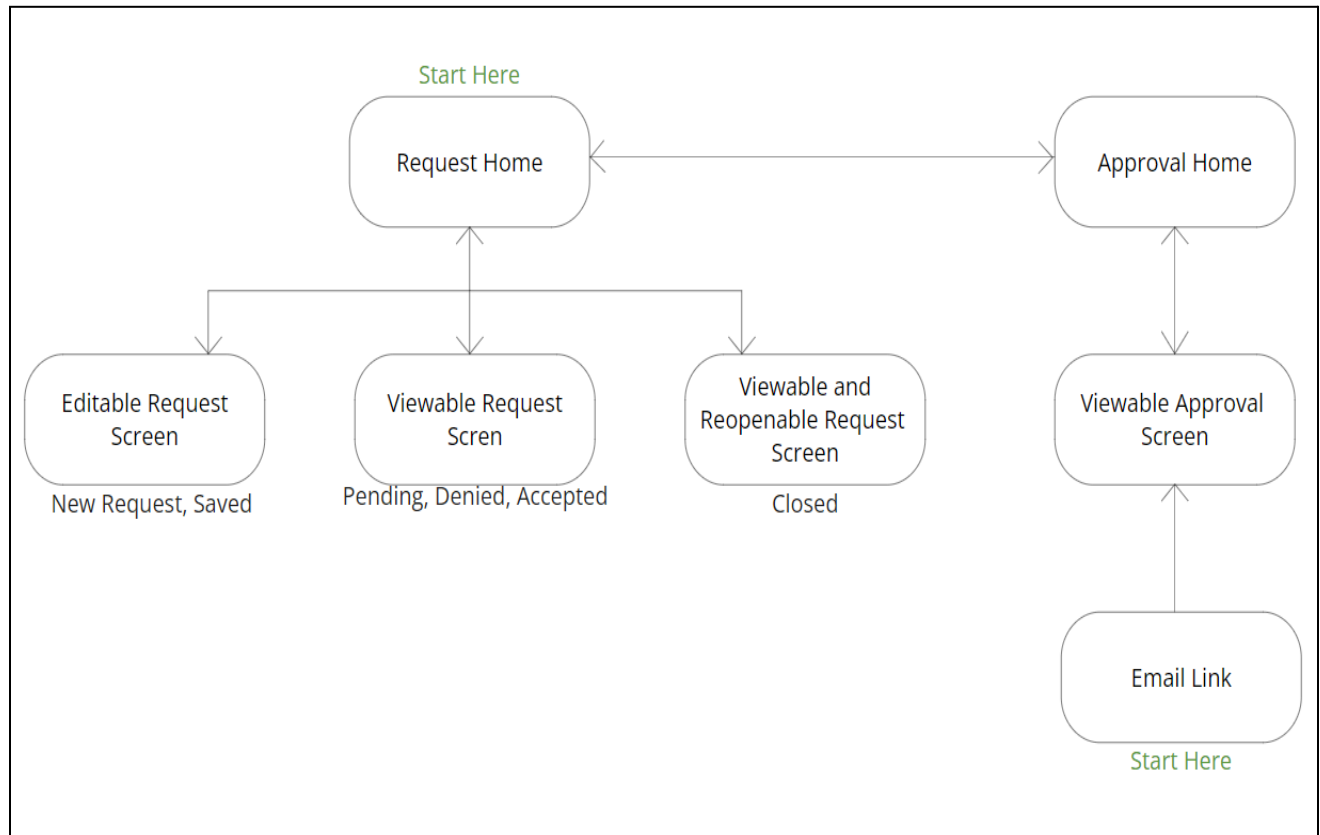
Deny

If you would like to prevent this request from being resubmitted after it's denial

Prevent this request from being resubmitted

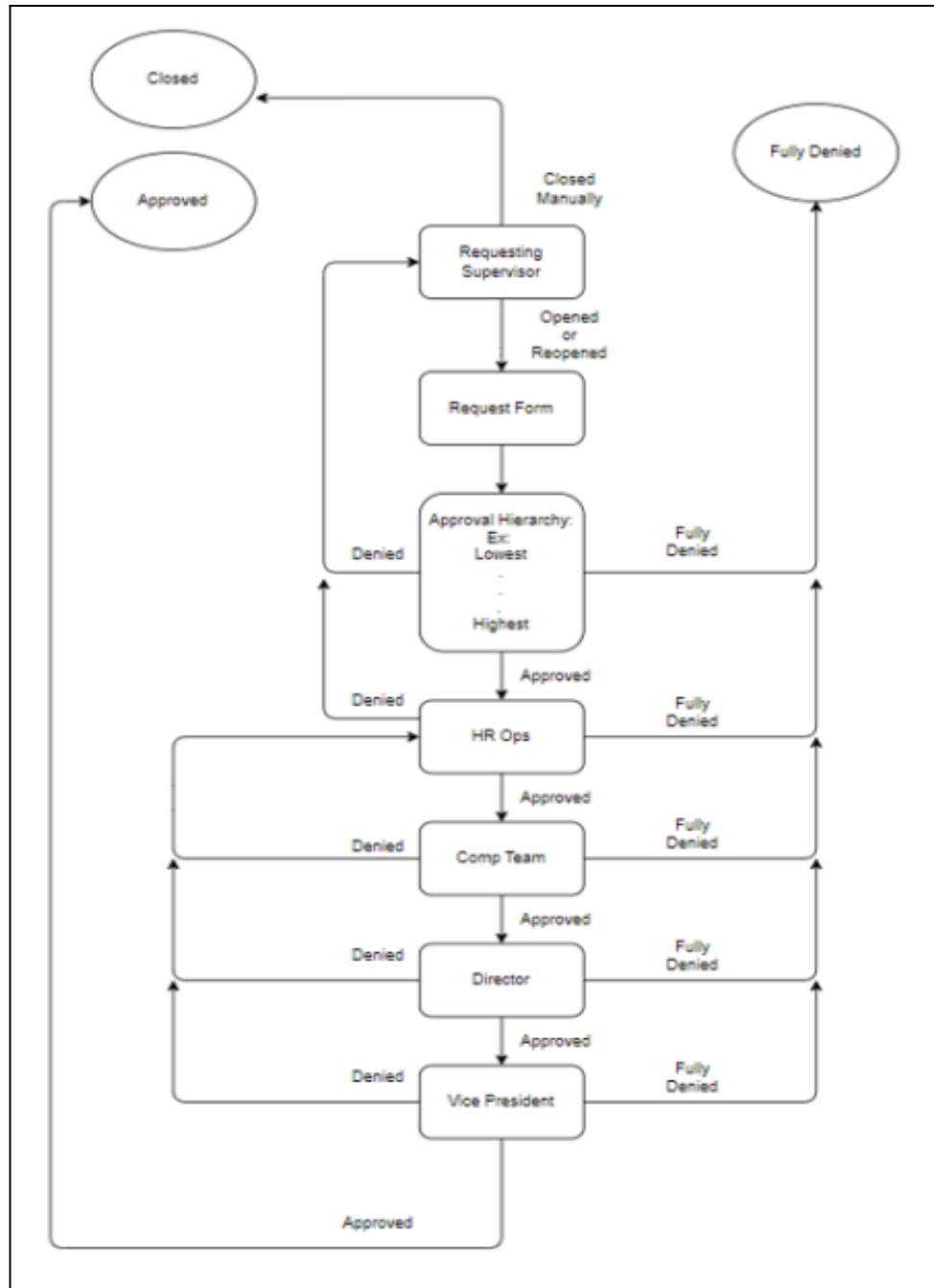
UI Flow Diagram

Connection between each screen in the application



Workflow Diagram

The flow that a specific request will follow



*If a request is reopened, all data in the actual form will be copied into a separate row in the sharepoint list with a new unique form ID. All information regarding comments and the approval for members in the approval chain will be reset to the default state of a new form.

App States Possible states of a request form	
State	State Description
Closed	The request has been manually closed by the initiator and can be reopened. Counts as "inactive"
Open	The request is being edited by the initiator. Counts as "active"
Pending	The request is pending approval. Counts as "active".
Approved	The request has been approved by the vice president. Counts as "active"
Denied	The request was denied and can be closed or reopened from here by the initiator. Counts as "active"
Fully Denied	The request was fully denied and cannot be reopened. Counts as "inactive"

*Active requests are requests that prevent another request from being opened for the same member. Inactive ones do not prevent this.

17. Sharepoint List Design

The data for this application will be held in four unique sharepoint lists. The description of each list and the entries they hold are described below.

Request Sharepoint List Holds the data for each unique request made by the initiating supervisor	
Entry Name	Entry Description
FormID	Unique ID for each row of the Request List
RequestState	State of the request. Options of: -closed -denied -fully denied -open -pending approval -approved
RequestDate	Date that the request was submitted by the initiator.
EmpID	ID of employee being considered for promotion
Name	Name of employee
CurrentPosition	Current position of Employee
CurrentTitle	Current title of Employee
CurrentPay	Current pay of Employee
CurrentGrade	Current grade of Employee
NewPosition	New position of Employee
NewTitle	New title of Employee
NewPay	New pay of Employee
NewGrade	New grade of Employee
LastProgressionDate	Date of Employee's last progression
LastPerformanceRating	Last annual performance rating of Employee
Request Sharepoint List (continued)	

IsBudgeted	Boolean, whether or not the progression is budgeted
BudgetFeedback	if the progression is not budgeted, explanation for how it is covered in the budget
BusinessNeedFeedback	Describe the business need for the progression and how the Employee meets the need.
MinRequirements	the minimum requirements that must be met for the progression to take place.
MeetsRequirements	Whether or not the Employee meets the previously stated requirements.
RequirementsFeedback	Explanation for the Employee's previously stated eligibility.
LeaderOneEmail	Email for the first leader in the hierarchy
LeaderOneState	State of approval for first leader in the hierarchy. options of: -future -pending -approved -denied -fully denied
LeaderOneComments	comments for the first leader in the hierarchy.
LeaderOneDate	Date that the first leader responded to the request
LeaderTwoEmail	email for the second leader in the hierarchy
LeaderTwoState	State of approval for second leader in the hierarchy. options of: -future -pending -approved -denied -fully denied
LeaderTwoComments	comments for the second leader in the hierarchy.
Request Sharepoint List (continued)	

LeaderTwoDate	Date that the second leader responded to the request
LeaderThreeEmail	email for the third leader in the hierarchy
LeaderThreeState	State of approval for third leader in the hierarchy. options of: -future -pending -approved -denied -fully denied
LeaderThreeComments	comments for the third leader in the hierarchy.
LeaderThreeDate	Date that the third leader responded to the request
LeaderFourEmail	email for the fourth leader in the hierarchy
LeaderFourState	State of approval for fourth leader in the hierarchy. options of: -future -pending -approved -denied -fully denied
LeaderFourComments	comments for the fourth leader in the hierarchy.
LeaderFourDate	Date that the fourth leader responded to the request
LeaderFiveEmail	email for the fifth leader in the hierarchy
LeaderFiveState	State of approval for fifth leader in the hierarchy. options of: -future -pending -approved -denied -fully denied
LeaderFiveComments	comments for the fifth leader in the hierarchy.
Request Sharepoint List (continued)	
LeaderFiveDate	Date that the fifth leader responded to the request

HRState	State of approval for the HR representative. options of: -future -pending -approved -denied -fully denied
HRComments	comments for the HR representative.
HRDate	Date that the HR representative responded to the request
CompState	State of approval for the Compensation team. options of: -future -pending -approved -denied -fully denied
CompComments	comments for the compensation team.
CompSalarySuggested	the compensation team's suggested salary.
CompDate	Date that the compensation team responded to the request
DirectorState	State of approval for the Director. options of: -future -pending -approved -denied -fully denied
DirectorComments	comments for the director
DirectorDate	Date that the director responded to the request
Request Sharepoint List (continued)	
VPState	State of approval for the Vice President. options of:

	-future -pending -approved -denied -fully denied
VPComments	comments for the Vice President
VPDate	Date that the VP responded to the request

Non-progressed Employee Sharepoint List List of employees not considered for progression	
Entry Name	Entry Description
FormID	ID of request in which the Employee was specifically refused for consideration.
EmplID	ID of refused Employee.
Name	Name of refused Employee.
Grade	Grade of refused Employee.
Reason	Reason Employee was rejected (performance concerns, behavior concerns, new to position, does not meet performance expectations for current role, or other).
ReasonFeedback	Feedback behind reasoning decisions.

Hierarchy Sharepoint List List of members in the approval process	
Entry Name	Entry Description

FormID	ID of request in which the supervisor was specifically added to the approval hierarchy
HierarchyPosition	Position on the hierarchy of the request for that supervisor (1 being lowest, 5 being highest)
Name	Name of supervisor
Email	Email of supervisor
Title	Title of supervisor

Employee Sharepoint List List of employees in the company	
Entry Name	Item Description
EmplID	Employee ID
Name	Employee name
Email	Employee email
Title	Employee title

New System Description

If the solution requires a new system or configuration, provide a description of the new system in the space provided below.

Our app streamlines OGE's previous progression process. The paper approval process was slow and unoptimized, ending in a member manually digitizing the resulting information. Our PowerApp handles the entire approval process digitally which drastically reduces the time commitment. Supervisors can create a new approval request for their members. When submitted, the request will be emailed for approval, in order, to all relevant members. If any concerns or objections arise with the request, it can be denied with a comment explaining the reasoning. The comments would be shared with the initiating supervisor to allow easy adjustment and resubmission for their request with the new information. This creates an easy feedback loop to allow the supervisor to proceed with their promotion request.