**Enlightened Task Order Management System**

**(M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS)**

**Sprint Cycle #2 Plan**

**Design Notes**

**Date: 4/28/2021**

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# Introduction

## 1.1 Document Overview

The TOMS Sprint Cycle Software Design Notes will provide documentation to aid in software development details for how the TOMS software should be built. Within the Sprint Cycle Software Design Notes are narrative and graphical documentation of the software design for the project. The purpose of the Sprint Cycle Software Design Notes is to provide a description of the design of a system fully enough to allow for software development to proceed with an understanding of what is to be built and how it is expected to built. The Software Design Document provides information necessary and the details for the software and system to be built. The TOMS Testing system can be launched by clicking the following link: [**http://intapp.enlightened.com/Toms/EnlTask/Index**](http://intapp.enlightened.com/Toms/EnlTask/Index)

## 1.2 TOMS Overview

The following picture (Figure 1) illustrates the TOMS Concept of Operations (CONOPS). The Source Contract Vehicles on the left side send task order opportunities to key Enlightened personnel (Executives, Contract Managers and Business Development) via email. TOMS will automatically parse the email, and store the desired information and attachments in a backend database, and send an automated email to key Enlightened decision makers to decide whether or not to bid on the project. Once Enlightened decides to bid on the contract, TOMS will auto-email out the new Task Order to the opportunity Partners that belong to the associated contract vehicle. They can log into the TOMS system with their preset TOMS account view the Task Order documents to determine if they are interested. If interested in partnering with Enlightened, they can select the ‘Express Interest’ button which allows them to fill details such as the related projects, capabilities and specialities that make them a suitable candidate to bid on the project. Once the partner submits the form, TOMS sends an auto-email to a preset list of Enlightened recipients to specify the interest of partners for bidding. TOMS allows the Enlightened users to manage the task order throughout the rest of its life cycle with Task Order Dashboard and Task Order Management Services. In addition, TOMS provides a variety of Administrative Services that are used to setup and manage the operation of TOMS.

A screenshot of a cell phone

Description generated with very high confidence

Figure 1: TOMS Concept of Operations

## 1.3 Agile Development Lifecycle

Conceptually, Enlightened’s Agile Development Lifecycle process is to define a *Vision* of a product or the *Vision* of a solution for a customer. With a defined vision, the Agile Development Lifecycle (**Figure 2**) starts with Sprint Cycle #1 where a subset of the overall task list is planned to be worked during that iterative cycle. This iterative sprint cycle process continues from Sprint Cycle #1 out to Sprint Cycle N where the end of development for the project occurs. The number of Iteration cycles depends on the number of tasks to be completed and the complexity of the development work that is required to complete the vision successfully.

A screenshot of a cell phone

Description generated with high confidence

Figure 2 - Agile Development Lifecycle featuring Sprint Cycles.

Enlightened’s Agile SDLC uses six development phases to complete the Sprint Cycle. The details of the Sprint Cycle phases are described in detail in **Table 1** below.

Table 1 – Sprint Cycle Development Phases

|  |  |  |
| --- | --- | --- |
| **#** | **Phase** | **Description** |
| **1** | **Evaluation / Prioritization** | Each Sprint Cycle starts with the Sprint Planning where the existing tasks in the Sprint Backlog are evaluated (based on priority and complexity) to determine the set of tasks to include in the next Sprint Cycle. It is strategic to group functionally related task items together in a sprint plan. |
| **2** | **Detailed Requirements** | Each task in the Sprint Plan needs to have all the associated business and functional requirements associated with it identified and documented. |
| **3** | **Design & Analysis** | Each task in the Sprint Plan needs to have a functional analysis and design performed based on the existing requirements. The result is a design that the developers can utilize during implementation. |
| **4** | **Implementation & Developer Testing** | Agile software development team implements the desired product functionality and executes their functional unit and integration tests. |
| **5** | **QA / Enhanced Testing** | Quality Assurance is critical to maintaining our high standards in delivery of our products and services. The Enhanced Test Design Process requires an extensive review of the business and functional requirements and is a key task in our methodology. |
| **6** | **Deployment** | Deploy the previously demonstrated working software to the client and designated users – either all at once, or in phases if so desired. Complete the comprehensive release testing (e.g. automated and manual functional, performance, load, and security testing), deployment, and release closing, including release retrospective. |

##### Agile Software Development Sprint Cycle Implementation

Enlightened’s Agile Software Development Implementation process utilizes a *Sprint Cycle* process as illustrated in **Figure 3** below. The implementation of the Agile Software Development Cycle features a *Product Backlog* that contains all the required tasks, issues to be corrected and enhancement requests that exist for the product. Each *Sprint Cycle* starts with a *Sprint Planning* session where the existing product tasks from the *Product Backlog* are evaluated, prioritized and functionally grouped to be worked in the next *Sprint Cycle*. The result of the *Sprint Planning* session is a list of task items that make up the next *Sprint Backlog*. The *Sprint Backlog* is then used as the basis for the Sprint Cycle Plan which contains:

* Detailed Description of each of the tasks to be developed
* List of requirements that are associated with each task
* Design Notes on the how each task item is to be implemented
* Sprint Cycle Schedule includes the start / end of development dates, dates/times for the Progress Meetings (if not every day), and Testing start/end dates

During the *Sprint Review*, a demonstration of the new software features developed occurs for the stakeholders of the product. It is important that the customers and business stakeholders provide feedback to ensure that the resulting product meets their needs. The completion of each iteration cycle results in the next release of the working software/product. Each iteration is a set length (# of weeks) and has a fixed completion time. Multiple iterations will take place during the Agile software development lifecycle. Each *Sprint Cycle* is a complete software development life cycle (SDLC) that goes through the following implementation process.

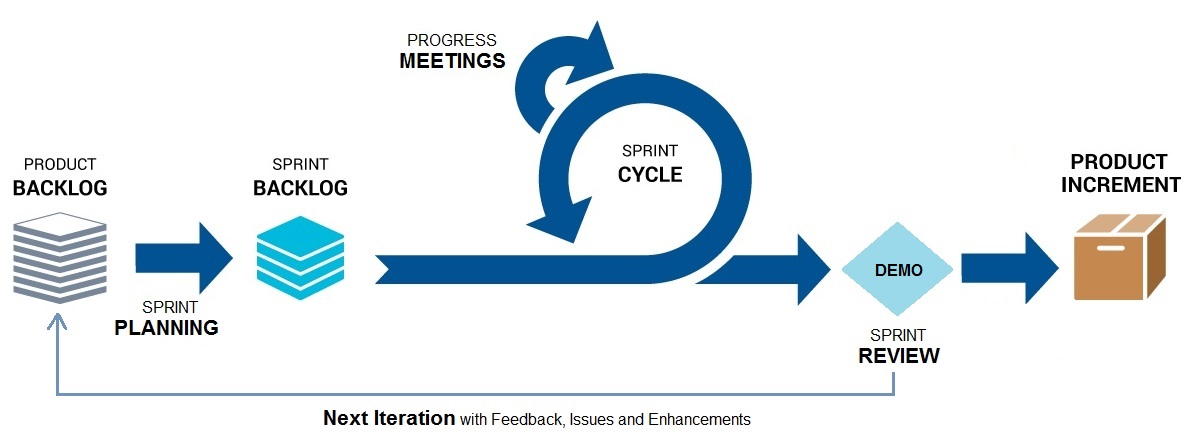


Figure 3 – Enlightened’s Agile Software Development Sprint Cycle Implementation

**Table 2** identifies each of the components for the agile development sprint cycle implementation as illustrated in the figure above. Enlightened uses the defined seven (7) components of this iterative process to complete each Sprint Cycle.

Table 2 – Agile Development Sprint Cycle Components

| **#** | **Component** | **Description** |
| --- | --- | --- |
| **1** | **Product Backlog** | List of all the current tasks to be completed |
| **2** | **Sprint Planning** | Process that selects the next set of tasks to be worked in the next Sprint |
| **3** | **Sprint Backlog** | Sprint Cycle Plan that identifies the set of tasks to be worked, the Sprint Cycle Schedule, Task Requirements and Task Design information. |
| **4** | **Sprint Cycle** | PHASES: Discover (Requirements), Design solutions, Software Development and Testing of the sprint cycle task items |
| **5** | **Progress Meetings** | List of status progress meetings specified in the Sprint Cycle Plan. This often occurs every day but is set based on the needs of the development team. |
| **6** | **Sprint Review** | Functional evaluation of the product increment occurs with a demonstration of the new product features implemented. Any stakeholder feedback, issues or enhancement request get added into the Product Backlog to be planned for a future Sprint Cycle. |
| **7** | **Product Increment** | The completed working software product that can be released |

# Sprint cycle #2 Plan

Enlightened Task Order Management System (M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS) has planned out the following tasks to be completed during this sprint cycle.

## Sprint Cycle #2 Schedule

The following table identifies the key dates involved in this sprint cycle:

|  |  |
| --- | --- |
| **Activity** | **Date** |
| Start Phase-1 Development | 4/19/2021 |
| Status Update | 4/22/2021 |
| Status Update | 4/29/2021 |
| Complete Phase-1 | 5/3/2021 |
| Testing | 5/3/2021 |
| Next Sprint Cycle Planning and Design | 5/6/2021 |

Table 3: Sprint Cycle Schedule

## Sprint Cycle #2 Detailed Plan

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Task ID** | **Functional Category of Task** | **TOMS PRODUCT SPRINT CYCLE #2** | **Priority [1=Highest]** | **Estimated Complexity [1=Complex]** | **Design Suggestions** |
|  |
| **[** 2Weeks **]** |  |
| ***Includes: design, code, unit test, and integration activities*** |  |
| **1** | Design | **Sprint Cycle Requirements & Design Notes** | 1 | 2 |  |  |
| **2** | Contract Vehicles | Create Administrative Web Page called **Contract Vehicles** used by the Contract Manager to [Add / Edit / Delete] Contract Vehicles and also set the EOI response time frame used for each Contract Vehicle (defaults to 24 hours). Add '**Contract Vehicles**' to the 'Administration Menu List.   The system shall allow Contract Manager the following fields to Add on the **Add Contract Vehicle** page: [ Vehicle Name, Vehicle Number, Vehicle Description, Date, Performance Period, Teaming Partners Email List (dropdown)]. Validate data entry fields. | 1 | 2 |  |  |
| **3** | Create Task Order | TOMS shall parse the new task order opportunity for a Contract Vehicle in a backend database and forward an automated email to the key Enlightened personnel related to BID/NO-BID decision. | 1 | 2 |  |  |
| **4** | Task Order; Bid/No Bid Decision | On the Edit Task Order page, the Contract Manager can change the state of the Task Order to ‘Bid’ or 'No Bid' or 'Cancelled' from the Task Order ‘Status:' data field. Changes to the ‘Status’ drop-down field will update the Bid Proposal Decision:' field. The Bid / No-Bid decision is to be tracked in its own data field to show the decision that was made and so that it can be used for TOMS statistics The ‘Bid Decision field is displayed on the Task Order Details page. | 1 | 2 |  |  |
| **5** | Expression of Interest, **Past Performance details** | Once Enlightened makes decision to bid on the contract, ETOMS must send an automated email to the partners associated with the contract vehicle to know of their Expression of Interest in bidding for the contract.  TOMS must enable the partners to log in into the system and select the button to BID/NO-BID. If the BID button is enabled, partner then fills a past performance report [ **Fields:** Interested in Bidding, Agency Experience, Similar Past Performance, Key strengths (Dropdown: Key Personnel, Past Performance, Key Partner Influencer, etc) | 1 | 2 |  |  |
| **6** | Task Order; Proposal Submission Decision | Once the EOI response is received from partners, TOMS should send an automated email to key Enlightened personnel to notify them of the interested partners. On the Edit Task Order page, the Contract Manager can change the state of the Task Order to **'Submitted'** or **'Not-Submitted'** or **'Cancelled'** from the Task Order ‘Status:' data field. Changes to the ‘Status’ drop-down field will update the 'Submit Proposal Decision:' field. Submission of the Proposal Submission decision can also be performed by utilizing the appropriate buttons on the Edit Task Order page. | 1 | 1 |  |  |
| **7** | Bid/No-Bid; Auto Email | The TO is to have a ‘Bid/No Bid Due Date’ date field. This gets filled in during TO creation. After a TO receives an EIO Response (from approved Teaming Partner(s)/CTA Member(s), TOMS should notify the Contract Manager (by email) with the specific date information from the ‘Bid/No Bid Due Date’ date field. When the TO State changes to 'EOI Assessment' the email trigger will send an email to the Contract Manager. This is a reminder notification to the Contract Manager regarding the due date for the Bid/No Bid decision. | 1 | 2 |  |  |
| **9** | Auto Email | When the state of a TO changes, send an automated email to all the associated partners with the corresponding Contract Vehicle. Example Task Order States: [‘Open’, ‘EOI Assessment’, 'Bid', 'No-Bid', ‘Proposal Development’, 'Submitted', ‘Not Submitted’, ‘Cancelled’, 'Selected', 'Not Selected']. | 1 | 2 |  |  |
| **10** | Dashboard | **Create Dashboards:** Create dashboards to display the details of past and present contracts for partners (only for the contract vehicles they are associated with) | 2 | 3 |  |  |
| **11** | Development | **End of Development Sprint Cycle** |  |  |  |  |
| **12** | Testing | **Sprint Cycle Testing** |  |  |  |  |
| **13** | Planning | **Next Sprint Cycle Planning** |  |  |  |  |
|  |  | *Sprint Cycle Total Hours* |  |  |  |  |
|  |  | *Sprint Cycle Total # of Days* |  |  |  |  |

Table 4: Sprint Cycle Detailed Task Plan

## Sprint Cycle Task 1 – Requirements and Design Notes

This document *TOMS Sprint Cycle #2 Design Notes* serves to address the requirements and the design notes for each of the planned task items in the TOMS Sprint Cycle Plan.

## Sprint Cycle Task 2

**Task Overview**

|  |  |
| --- | --- |
| **Task Summary** | **Value** |
| TOMS Functional Category | Contract Vehicle |
| Task Priority [1=Highest] | 1 |
| Task Complexity Level [1=Highest] | 2 |

**Task Description**

Create Administrative Web Page called ***Contract*** ***Vehicles*** used by the Contract Manager to [Add / Edit / Delete] Contract Vehicles and also set the EOI response timeframe used for each Contract Vehicle (defaults to 24 hours). Add 'Contract Vehicles' to the 'Administration Menu List.

**TOMS Functional Requirements**

|  |  |  |
| --- | --- | --- |
| 4.1.4 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall allow Contract Manager permission to Add/Delete/Edit Vehicle. | Mandatory |
| 4.2 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall allow the Contract Manager to Add Contract Vehicle, Delete Contract Vehicle, and Update Contract Vehicle. | Mandatory |
| 4.2.1 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall have a 'Add Contract Vehicle' page that allows Contract Manager to Add New Contract. | Mandatory |
| 4.2.2 | The system shall provide Contract Manager ability to Add Contract Vehicle. | Mandatory |
| 4.2.3 | The system shall allow Contract Manager the following fields to Add on the Add Contract Vehicle Record:  Vehicle Name, Vehicle Number, Vehicle Description, Date, Performance Period, Other Partners. | Mandatory |
| 4.2.4 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall enable Contract Manager to Create Vehicle Name. | Mandatory |
| 4.2.5 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall enable Contract Manager to Create Vehicle Number. | Mandatory |
| 4.2.6 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall require that Contract Managers have an assigned Vehicle Description. | Mandatory |
| 4.2.7 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall require that Contract Managers have an assigned Performance Period. | Mandatory |
| 4.2.8 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall require that Contract Managers have a Partners selected from Drop Down. | Mandatory |
| 4.2.9 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall ensure that each "Contract Vehicle" has a ‘Vehicle Name'. | Mandatory |
| 4.2.10 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall ensure each Contract Name field accepts alpha numerical characters only. | Mandatory |
| 4.2.11 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall ensure each Contract Description field accepts alpha numerical characters only. | Mandatory |
| 4.2.12 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall ensure each Contract Date field accepts Date only. | Mandatory |
| 4.2.13 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall ensure each Performance Period field accepts alpha numerical characters only. | Mandatory |
| 4.2.14 | The system shall validate the required fields and display an error message for unsuccessful validation. | Mandatory |
| 4.2.15 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall allow Contract Manager to edit each of the records in the Contract Vehicle details. | Mandatory |
| 4.2.16 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall allow Contract Manager to edit Contract Description. | Mandatory |
| 4.2.17 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall allow Contract Manager to edit Performance Period. | Mandatory |
| 4.2.17 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall allow Contract Manager to select approved Teaming Partner(s)/CTA Member(s)s from the Drop Down list. | Mandatory |
| 4.2.18 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall allow Contract Manager to Delete each of the records in the Contract Vehicle. | Mandatory |

**Design Solution Notes**

Create new web page called ‘**Contract Vehicles**’ with authorized access by the Contract Manager and System Admin. The Contract Vehicles form needs to provide functionality to Add / Edit / Delete contract vehicle records.

The **Contract Vehicles** form should contain the following fields:

* Contract Vehicle Name (text field, validate: Alphanumeric)
* Contract Vehicle Number (text field, validate: Alphanumeric). Required to be unique.
* Contract Vehicle Description (text field, validate: Alphanumeric)
* Date Added (date field, validate valid date format)
* Performance Period (text field, validate: Alphanumeric)
* Teaming Partners. (Drop down list)
  + Used to populate a list of Partners assigned to the contract Vehicle)
* EOI Response Timeframe. (Numeric field validate: Numeric). Defaults to 24 hours.
  + Used to set the EOI response timeframe (in hours) used for the contract vehicle as a deadline to respond to Enlightened with their Expression of Interest.
* Form Buttons: ‘Add’, ‘Update’, ‘Delete’

Add **'Contract Vehicles**' to the 'Administration’ Menu List.

## Sprint Cycle Task 3

**Task Overview**

|  |  |
| --- | --- |
| **Task Summary** | **Value** |
| TOMS Functional Category | Create new Task Order |
| Task Priority [1=Highest] | 1 |
| Task Complexity Level [1=Highest] | 1 |

**Task Description**

Create a new task order by parsing the task order information related to contract vehicles and storing it in database along with the attached files. Contract Vehicles will send the information related to the task orders via email, to a predefined enlightened email account, and this email will be parsed to extract the important information related to the Task Order and store it in the database. Once the data has been parsed into the database, an auto-email will be sent to the key Enlightened personnel, to know whether or not to BID on a specific contract.

**TOMS Functional Requirements**

|  |  |  |
| --- | --- | --- |
|  | **BID/NO BID Functionality** |  |
| 4.3.1 | The system shall parse the email received from Contract Vehicle and store key information in the backend database. | Mandatory |
| 4.3.2 | The system will send an automated email to the key Enlightened personnel to know whether to bid on the contract. | Mandatory |

**Design Solution Notes**

TOMS will parse the email received from the contract vehicle and store the information related to the task order in the database. Once the data has been stored successfully in the database, an automated email must be sent to the to the key Enlightened personnel to know whether to bid on the contract.

* Parse the email received from Contract Vehicle
* Create new Task Order based on the contract\_vehicle\_number
* Send automated email to key Enlightened personnel regarding task order information
* Create a page to display Task Orders and edit the status of Task Orders (BID/NO-BID)

## Sprint Cycle Task 4

**Task Overview**

|  |  |
| --- | --- |
| **Task Summary** | **Value** |
| TOMS Functional Category | Task Order; Bid/No Bid Decision |
| Task Priority [1=Highest] | 1 |
| Task Complexity Level [1=Highest] | 1 |

Once the task order has been created, TOMS shall send an automated email to key Enlightened personal to submit the BID/NO BID decision. TOMS shall allow Contract Manager to Edit the BID/NO BID Decision. On the **Edit Task Order** page, the Contract Manager can change the state of the Task Order to ‘Bid’ or 'No Bid' or 'Cancelled' from the Task Order ‘Status:' data field. Changes to the ‘Status’ drop-down field will update the Bid Proposal Decision:' field. The Bid / No-Bid decision is to be tracked in its own data field to show the decision that was made and so that it can be used for TOMS statistics. Submission of the Proposal Submission Decision can also be performed by utilizing the appropriate buttons on the **Edit Task Order** page. The ‘Bid Decision:’ field is displayed on the **Task Order Details** page.

**TOMS Functional Requirements**

|  |  |  |
| --- | --- | --- |
|  | **BID/NO BID Functionality** |  |
| 4.4.1 | The system shall parse the email received from Contract Vehicle and send an automated email to key Enlightened personnel to make BID/NO BID decision. | Mandatory |
| 4.4.2 | The system shall display BID/NO BID checkbox on the Task Order page.  JM => I changed this to a drop down instead of a check box. | Mandatory |
| 4.4.3 | The system shall allow Contract Manager to Submit BID/NO BID decision via dropdown menu.  JM => I changed this to a drop down instead of a check box. | Mandatory |
| 4.4.4 | The system shall allow Contract Manager to Edit BID/NO BID decision via dropdown menu.  JM => I changed this to a drop down instead of a check box. | Mandatory |
| 4.4.5 | The system should send any automated email to the partners if Enlightened decides to BID on the contract. | Mandatory |

**Design Solution Notes**

TOMS allow the Contract Manager to edit the Bid status to one of the following states – Bid’ or ‘No Bid' or 'Cancelled'.

Please see the TOMS State diagram in Sprint Cycle Task 7 for full reference.



Update the TOMS **Edit Task Order** Page and create new action buttons that follow the allowed TO state flow. In this case, ‘Bid Proposal’, ‘No Bid Proposal’ and ‘Proposal Cancelled’ buttons are to be an active choice.

* ‘Bid the Proposal’ button changes the TO state to ‘Bid’
* ‘No Bid the Proposal’ button changes the TO state to ‘No Bid’
* ‘Proposal Cancelled’ button changes the TO state to ‘Cancelled’

Update the TOMS **Edit Task Order** Page and modify the existing ‘Status:’ non-editable field to make it an editable drop-down list box that lists the allowable state changes (‘Bid’, ‘No Bid’ or ‘Cancelled’). Selecting the ‘Updated Task Order’ button confirms the status change. Note: The Contract Manager can change the Bid Decision to No Bid, until the submission of the proposal.

Update the TOMS **Task Order Details** page and add ‘Bid Decision:' non-editable data field. This field will display either: ‘Bid’ or ‘No Bid' or 'Cancelled'. Send an automated notification to associated partners, to know of their Expression of Interest for bidding on the contract, if Enlightened decides to bid on the contract.

## 2.7 Sprint Cycle Task 5

**Task Overview**

|  |  |  |
| --- | --- | --- |
|  | **BID/NO BID Functionality** |  |
| 4.5.1 | The system shall parse the email received from Contract Vehicle and store key information in the backend database. | Mandatory |
| 4.5.2 | The system will send an automated email to the partners related to a Contract Vehicle to enquire about their Expression of Interest. | Mandatory |

**Task Description**

ETOMS will send automated emails to the partners associated with the contract vehicle to know of their Expression of Interest in bidding for the contract.

On the **Display Task Order** page, TOMS must enable the partners to log in into the system and view the details specific to task orders for a Contract Vehicle. When a specific task order is selected, the systems must provide option to select one of the buttons- BID or NO-BID. If the BID button is enabled, then display a form containing details such as related projects, capabilities, specialties which make them likely candidate for bidding on project. Once the partner submits the performance report, ETOMS sends the EOI response to key Enlightened personnel via auto-email.

**Design Solution Notes**

TOMS allow the partners to log into the system and specify the interest- BID or NO BID for a contract related to the contract vehicles with which partner is associated.

Create the TOMS **Display TASK ORDER** Page and design a form for filling the past performance details for the partner, which makes them a suitable candidate for bidding for the contract

* Enable partner to select a Contract Vehicle related task orders
* Provide BID and NO BID buttons to make the decision
* Display the form containing information related to past performance of the client

TOMS must sort the Task Orders related to a Contract Vehicle based on the order of submission date. TOMS must only display Task Orders associated with Contract Vehicles related to the partner.

If partner selects NO BID, TOMS must logout the partner, else display a form which enables the partner to fill the **past performance report** of their company with the following fields:

* Interested in bidding (y/n)
* Agency Experience (y/n) - If yes describe
* Similar Past Performance (y/n)- If yes describe
* Key strengths (Drop down)
  + Key Personnel
  + Past Performance
  + Key Partner
  + Influencer
  + Others tbd

TOMS must send an auto-email to key Enlightened personnel to notify them of the partner’s interest in bidding for the contract.

## 2.8 Sprint Cycle Task 6

**Task Overview**

|  |  |
| --- | --- |
| **Task Summary** | **Value** |
| TOMS Functional Category | Task Order; Proposal Submission Decision |
| Task Priority [1=Highest] | 1 |
| Task Complexity Level [1=Highest] | 2 |

**Task Description**

Once the EOI response is received from the client, Enlightened will make the decision whether or not to submit the proposal. On the **Edit Task Order** page, the Contract Manager can change the state of the Task Order to 'Submitted' or 'Not-Submitted' or 'Cancelled' from the Task Order ‘Status:' data field. Changes to the ‘Status’ drop-down field will update the 'Submit Proposal Decision:' field. Submission of the Proposal Submission decision can also be performed by utilizing the appropriate buttons on the **Edit Task Order** page. The 'Submit Proposal Decision: field is displayed on the **Task Order Details** page.

**TOMS Functional Requirements**

|  |  |  |
| --- | --- | --- |
| 4.1.7 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS shall allow Contract Manager permission update the status of Task Order as ‘Submitted’, ‘Not-Submitted’ or Cancelled. | Mandatory |
| 4.1.8 | Changes made to Task Order state must be reflected in Submit Proposal Decision field. | Mandatory |
| 4.6.1 | The system shall provide the Contract Manager the capability to Submit Proposal Submission Decision. | Mandatory |
| 4.6.2 | M:\ENL Logos\ENL Logos (2010)\Enlightened bug edit.pngTOMS must notify the associated partners about the Enlightened decision related to bidding on the contract. | Mandatory |

**Design Solution Notes**

TOMS need to be able to change status from the ‘Bid’ state to the ‘Proposal Development’ state to the ‘Submitted’ State as the diagram below shows. Please see the TOMS State diagram in Sprint Cycle Task 7 for full reference.



Update the TOMS **Edit Task Order** Page and create new action buttons that follow the allowed TO state flow. In this case, a ‘Start Proposal Development’ button is to be an active choice.

* ‘Start Proposal Development’ button changed the TO state to ‘Proposal Development’

Once the button has been selected the Task Order will be updated to ‘Proposal Development’. The form then changes and activates the next available state in the TO state diagram. The next case is

* ‘Submit Proposal’ button changes the TO state to ‘Submitted’
* ‘Do Not Submit Proposal’ button changes the TO state to ‘Not Submitted’
* ‘Proposal Cancelled’ button changes the TO state to ‘Cancelled’

Update the TOMS **Edit Task Order** Page and modify the existing ‘Status:’ non-editable field to make it an editable drop-down list box that lists the allowable state changes (‘Proposal Development’). Once the Task Order has been updated via the ‘Update Task Order’ button then the ‘Status:” drop down list will now contain the next available state in the TO state diagram as an option (‘Submitted’, ‘Not Submitted’ or ‘Cancelled’), and an auto-email will be triggered to be sent to partners to notify them of change of status related to the proposal submission.

Update the TOMS **Task Order Details** page and add 'Submit Proposal Decision: ' non-editable data field. This field will display either: 'Submitted' or 'Not-Submitted' or 'Cancelled'.

## 2.9 Sprint Cycle Task 7

**Task Overview**

|  |  |
| --- | --- |
| **Task Summary** | **Value** |
| TOMS Functional Category | Bid/No Bid; Email |
| Task Priority [1=Highest] | 1 |
| Task Complexity Level [1=Highest] | 2 |

**Task Description**

The **Create Task Order** page is to have a ‘Bid Decision Due Date:’ date field. This gets filled in during creation/entry of the Task Order. After a TO receives an EIO Response (from approved Teaming Partner(s)/CTA Member(s), TOMS should notify the Contract Manager (by email) with the specific date information from the ‘Bid Decision Due Date:’ date field. When the TO State changes to 'EOI Assessment' the email trigger will send an email to the Contract Manager.

This is a reminder notification to the Contract Manager regarding the due date for the Bid/No Bid decision.

**TOMS Functional Requirements**

|  |  |  |  |
| --- | --- | --- | --- |
| 4.5 | The TO is to have a ‘Bid/No Bid Due Date’ date field. This gets filled in during TO creation. After a TO receives an EIO Response (from approved Teaming Partner(s)/CTA Member(s), TOMS should notify the Contract Manager (by email) with the specific date information from the ‘Bid/No Bid Due Date’ date field. When the TO State changes to 'EOI Assessment' the email trigger will send an email to the Contract Manager. This is a reminder notification to the Contract Manager regarding the due date for the Bid/No Bid decision. | Mandatory | |
| 4.5.1 | | System Shall send email with to notify Contract Manager with notification of BID/NO BID decision response due date and time. | Mandatory |
| 4.6.4 | System Shall send email to notify approved Teaming Partner(s)/CTA Member(s), Enlightened Team Members, subcontractors with notification of BID/NO BID decision response due date and time. | Mandatory | |

**Design Solution Notes**

Update the **Create Task Order** page to add a ‘*Bid Decision Due Date:*’ date field. The field should accept valid date entries. This date gets filled in during creation/entry of the Task Order and is displayed (non-editable) on the **Task Order Details** page.

After TOMS receives an EIO Response [from approved Teaming Partner(s)/CTA Member(s)], for a Task Order, TOMS will notify the Contract Manager (by email) with the specific date information from the *‘Bid Decision Due Date*:’ date field. When the TO State changes to ‘Open' the email trigger will send an email to the Contract Manager through the functionality provided by the **Email Lists** management. Set up a rule for an auto-email to be sent to the Contract Managers when the Task Order state is changed to ‘Open’. The Email should contain the

This is a reminder notification to the Contract Manager regarding the due date for the Bid/No Bid decision.

## 2.10 Sprint Cycle Task 8

**Task Overview**

|  |  |
| --- | --- |
| **Task Summary** | **Value** |
| TOMS Functional Category | Auto Email |
| Task Priority [1=Highest] | 1 |
| Task Complexity Level [1=Highest] | 2 |

**Task Description**

**Send an email to the associated partners whenever the TO state changes. There are many requirements in TOMS that involve automatic email functionality that gets initiated when a Task Order changes its status (internal state). The Email Group Management is also used to create email list groups to be associated with each Contract Vehicles defined in TOMS.**

**TOMS Functional Requirements**

**The following functional requirements are satisfied by a combination of Task 8 and Task 9 together.**

|  |  |  |
| --- | --- | --- |
| 1.2.1.1  1.2.1.2 | **When a new Task Order is created an Email Notification shall be sent to the following:**  System Users associated with Vehicle of the Potential Task Order.  System Users who are associated with the Contract and are not part of Original Bid. |  |
| 1.2.1.3  1.2.1.4 | **When a Task Order completes a workflow step the system shall trigger Email Notifications for following:**  Response by a designated Teaming Partner(s)/CTA Member(s) in the Expression of Interest (EOI).  Response submission from the Contract Manager on a Task Order. |  |
| 4.3.23 | When New Task order is created the system shall provide the capability to Auto generate an email to the designated Teaming Partner(s)/CTA Member(s) of the task order request. | Mandatory |
| 4.4.4 | The system shall provide the capability to generate email of Response (EOI) to the Contract Manager. | Mandatory |
| 4.4.4 | System Shall have capability to send email with EOI response to the Contract Manager. | Mandatory |
| 4.5.1 | System Shall send email with to notify Contract Manager with notification of BID/NO BID decision response due date and time. | Mandatory |
| 4.6.3 | The system shall provide the capability to generate an email of Proposal Submission Decision to approved Teaming Partner(s)/CTA Member(s), Enlightened Team Members. | Mandatory |
| 4.6.4 | System Shall send email to notify approved Teaming Partner(s)/CTA Member(s), Enlightened Team Members, subcontractors with notification of BID/NO BID decision response due date and time. | Mandatory |

**Design Solution Notes**

Send an email to the associated partners whenever a Task Order state changes. There are many requirements in TOMS that involve automatic email functionality that gets initiated when a Task Order changes its status (internal state). The drop-down is preloaded with all of the valid Task Order status/states [‘Open’, ‘EOI Assessment’, 'Bid', 'No-Bid', ‘Proposal Development’, 'Submitted', ‘Not Submitted’, ‘Cancelled’, 'Selected', 'Not Selected']. See the TOMS State Diagram Flow in Task 7 for the names of the task order status/states.

The page also contains a large text field called ‘Email Content’ that is used to enter the deafult email message that gets automatically sent for each TO state. The field called ‘Task Order State’ is stored with the record. (Suggestion: Email Content can be provided as a field in Task Order and updated as the Task Order State changes)

For example, when the TOMS status changes to the ‘Bid’ state, the Email Group Management record that was added for ‘Bid’ contains the pre-worded email message content that will be sent out and the pre-set email list of recipienets that were set up in the ‘Bid’ email group.

The Contract Vehicle can be fetched from the foreign key field of Task Order table.

A unique TOMS status (internal state) will be selected from a drop-down list to populate the ‘Email Group Name’ field. The valid TOMS states are as follow: [‘Open’, ‘EOI Assessment’, 'Bid', 'No-Bid', ‘Proposal Development’, 'Submitted', 'Selected', 'Not Selected'].

Add **'Email Lists**' to the TOMS 'Administration' drop down menu list.

## 2.11 Sprint Cycle Task 9

**Task Overview**

|  |  |
| --- | --- |
| **Task Summary** | **Value** |
| TOMS Functional Category | Email |
| Task Priority [1=Highest] | 1 |
| Task Complexity Level [1=Highest] | 2 |

**Task Description**

Create automatic Email distributions when Task Order 'State' changes. Each Task Order 'State' can have its own email distribution list that is defined through the Email Group Management. When the state of a TO changes, compare the new state to the states stored in the Email Group records to see if there is a match. If so, TOMS creates an email using the Email Text and Email Group list from the matching Email Group record and sends out the email. Example Task Order States: [‘Open’, ‘EOI Assessment’, 'Bid', 'No-Bid', ‘Proposal Development’, 'Submitted', ‘Not Submitted’, ‘Cancelled’, 'Selected', 'Not Selected']..

**TOMS Functional Requirements**

**The following functional requirements are satisfied by a combination of Task 8 and Task 9 together.**

|  |  |  |  |
| --- | --- | --- | --- |
| 1.2.1.1  1.2.1.2 | **When a new Task Order is created an Email Notification shall be sent to the following:**  System Users associated with Vehicle of the Potential Task Order.  System Users who are associated with the Contract and are not part of Original Bid. |  | |
| 1.2.1.3  1.2.1.4 | **When a Task Order completes a workflow step the system shall trigger Email Notifications for following:**  Response by a designated Teaming Partner(s)/CTA Member(s) in the Expression of Interest (EOI).  Response submission from the Contract Manager on a Task Order. |  | |
| 4.3.23 | When New Task order is created the system shall provide the capability to Auto generate an email to the designated Teaming Partner(s)/CTA Member(s) of the task order request. | Mandatory | |
| 4.4.4 | The system shall provide the capability to generate email of Response (EOI) to the Contract Manager. | Mandatory |
| 4.4.4 | System Shall have capability to send email with EOI response to the Contract Manager. | Mandatory |
| 4.5.1 | System Shall send email with to notify Contract Manager with notification of BID/NO BID decision response due date and time. | Mandatory | |
| 4.6.3 | The system shall provide the capability to generate an email of Proposal Submission Decision to approved Teaming Partner(s)/CTA Member(s), Enlightened Team Members. | Mandatory |
| 4.6.4 | System Shall send email to notify approved Teaming Partner(s)/CTA Member(s), Enlightened Team Members, subcontractors with notification of BID/NO BID decision response due date and time. | Mandatory |

**Design Solution Notes**

Create automatic Email distributions when Task Order 'State'/’Status’ changes. Each Task Order 'State' can have its own email distribution list that is defined through the **Email Group Management** page. When the state of a Task Order changes, compare the new state to the ‘*Task Order State*’ stored in the Email Group Management records to see if there is a match. If so, TOMS creates an email using the ‘*Email Content’* and ‘*Email Group*’ list from the matching Email Group record and sends out the email. Example Task Order States: [‘Open’, ‘EOI Assessment’, 'Bid', 'No-Bid', ‘Proposal Development’, 'Submitted', ‘Not Submitted’, ‘Cancelled’, 'Selected', 'Not Selected'].

Create automatic email distributions when a new Task Order is entered into ‘**Create Task Order’** page and the selected task order ‘Contract Vehicle Name’ matches a record stored in Email Group Management. If so, TOMS creates an email using the ‘*Email Content’* and ‘*Email Group*’ list from the matching Email Group record and sends out the email. For example, a new task order is entered into TOMS with a *Contract Vehicle Name* of ‘CMS-SPARC’. There is a ‘CMS-SPARC’ Email Group record that exists with the *Contract Vehicle Name* of ‘CMS-SPARC’. TOMS will create the automatic email using the *Email Content* and sending the email out to all of the email addresses listed out in the associated *Email Group*.

The following TOMS State Diagram illustrates all the status/states that TOMS will go through (for now) and the transition flow from one state to the next. If you look at one of the states from the diagram, then you can tell what are the potential next states that TOMS can transition to.

## 2.12 Sprint Cycle Task 10

**Task Overview**

|  |  |
| --- | --- |
| **Task Summary** | **Value** |
| TOMS Functional Category | Dashboards |
| Task Priority [1=Highest] | 2 |
| Task Complexity Level [1=Highest] | 1 |

**Task Description**

Create Dashboards: Create a dashboard where the partners can view the status of different task orders related to the contract vehicles they are associated with.

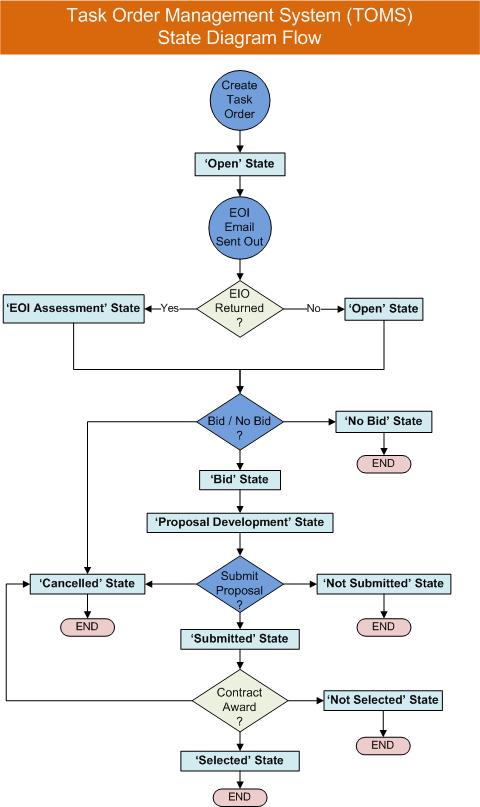
**TOMS Functional Requirements**

|  |  |  |
| --- | --- | --- |
|  | **BID/NO BID Functionality** |  |
| 4.5.1 | Create a dashboard that displays the details of the task orders associated with different contract vehicles. | Mandatory |
| 4.5.2 | For Enlightened Contract Manager, display all the Contract Vehicles and associated task orders. | Mandatory |
| 4.5.3 | For the partners, display only the task orders related to Contract Vehicles they are associated with. | Mandatory |

**Design Solution Notes**

This task creates a dashboard for the Contract Vehicles, which allows the Enlightened Contract Manager to manage different task orders related to different contract vehicles and sort them by their due dates. The dashboards also enable the partners to track the status of the contracts on which they are bidding, and which are due for submission.

* Enable role-based login to view dashboards
* For users with role admin/Contract Manager, display all Contract Vehicles and task orders related to them
* For users with role partner/user, display only the Contract Vehicles and task orders that they are bidding on, or have bid on in the past



## 

Figure 4: Flowchart for ETOMS as per changes discussed

## 2.13 Sprint Cycle Testing Plan

**New Test Cases**

The following Test cases are being added to the existing TOMS Regresion Functional Test Cases that are documented in the file “TOMS-FunctionalTestPlan.xlsx” located at:

P:\TOMs\6. Test\TOMS-FunctionalTestPlan.xlsx

|  |  |  |
| --- | --- | --- |
| **APPLICTION PAGE** | **ACTION TAKEN** | **EXPECTED RESULT** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |