



Camosun College

ICS 290 - Capstone Project

Products Requirement Document

Reporting and Dashboard Service Improvement

Project Sponsor:

BC Government OCIO-DIO
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Project Team:

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Samara Flueck

Version History

Version #	Implemented By	Revision Date	Approved By	Approval Date	Reason
1.0	<i>Team RDSI</i>	08/09/22	<i>Samara</i>	<i>08/12/21</i>	Initial Definition draft

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1. Introduction

The Digital Investment Office reports to the Office of the Chief Information Officer and manages funding for capital investments products that aim to improve digital services for British Columbians. Ministries that are awarded funding must submit quarterly reports detailing their project's performance.

The Business Problem:

The current manual quarterly reporting process involves filling out spreadsheets and submitting those reports via email. This process is time consuming and results in data that is difficult to quantify and analyze due to its subjective nature.

There is an absence of data captured in the current quarterly reporting process that objectively measures how a project is performing against its expected outcomes. Health of a project is currently measured based on the Ministry Submitter's interpretation using color statuses. Furthermore, percent complete for a project or milestones is entered based on the submitter's interpretation; there is no formula to calculate progress in the existing process.

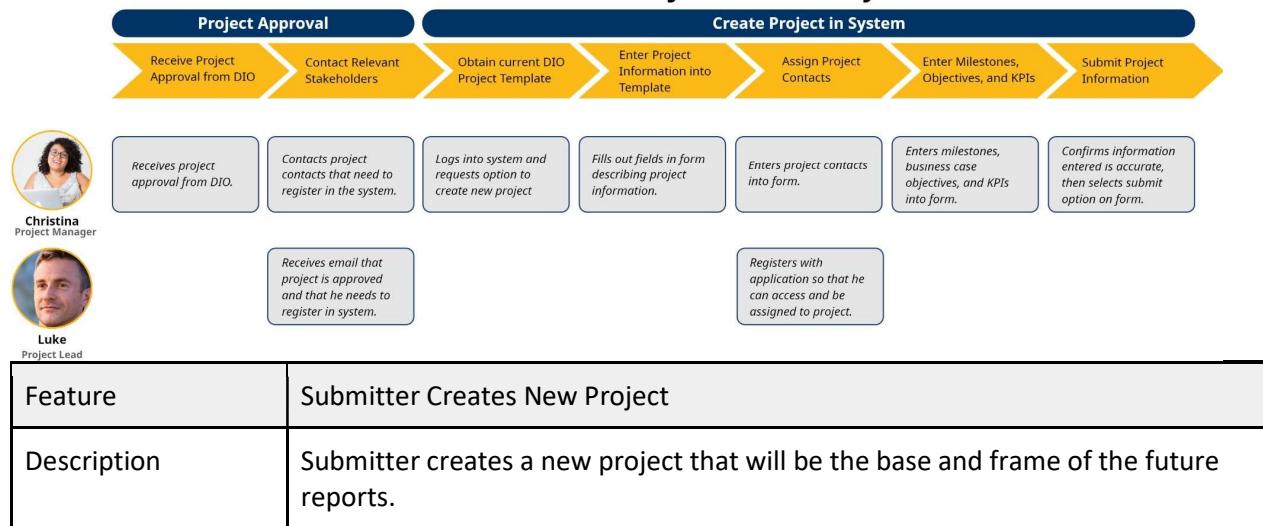
A lack of clear business rules surrounding the current reports causes users to interpret fields differently. Many users do not understand why all sections of a report are included and have a narrow focus on their area of understanding. This results in miscommunication and inconsistencies in how reports are filled out. This can also add to the time it takes to submit a report due to a lot of back-and-forth between PMs and Portfolio Managers to finalize details of a report.

Our Hypothesis:

Developing a modern web application to replace the current manual reporting process can improve workflows, enforce data consistency, and help stakeholders gain a deeper, more accurate understanding of how projects are performing. Integrating key performance indicators into the quarterly reporting process will further improve the ability to measure how a project is performing by capturing objective and measurable data.

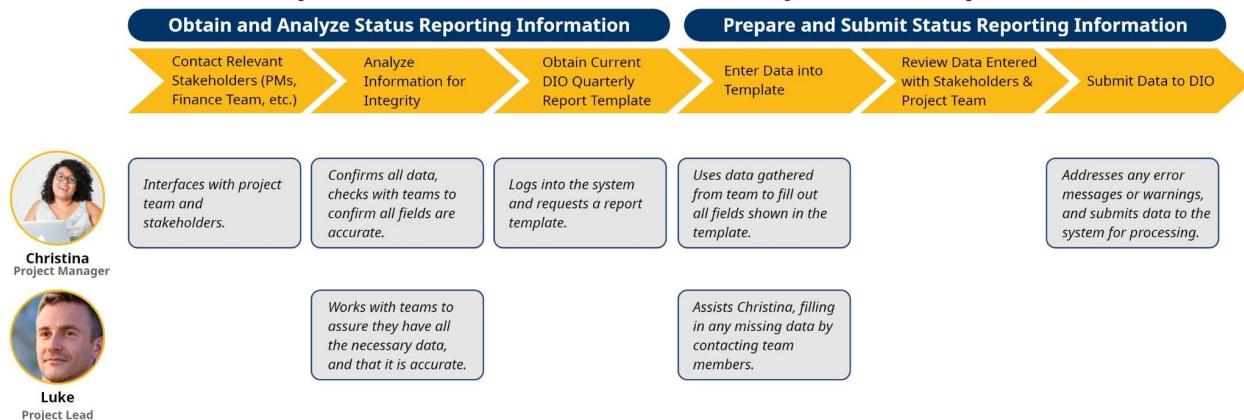
2. Features

Submitter Enters a New Project Into the System



Purpose	Project becomes a placeholder to host quarterly reports afterwards.
User problem	The spreadsheet format cannot guarantee the consistent project data through the series of reports.
User value	Submitters can focus on the reporting project's status instead of managing project data in every report.
Assumptions	Project has been approved by DIO and has an assigned project number.
Not doing	N/A
Acceptance criteria	<p>Project should contain the following information</p> <ul style="list-style-type: none"> ● General information ● Contacts ● Objectives ● Milestones ● KPIs <p>By creating a project, the initial report should be ready to edit.</p>

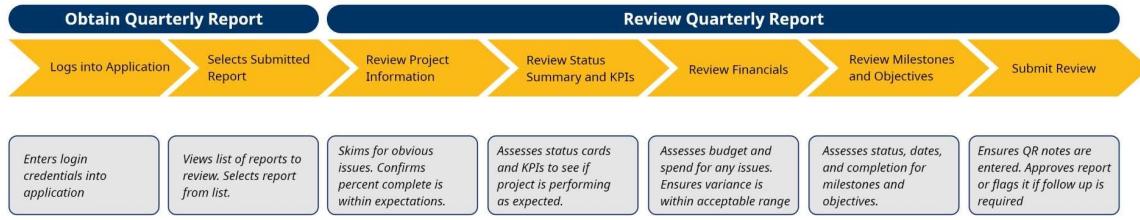
Submitter Completes and Submits a Quarterly Status Report to the DIO



Feature	Submitter Completes Quarterly Report
Description	Submitters report the project status every quarter.
Purpose	It replaces the current process of writing a spreadsheet and sending it by email.
User problem	It is hard and time-consuming to maintain data consistency and utilize reports for statistics.
User value	All input fields are populated with the project data and previous report. Input validations prevent human errors.
Assumptions	Project has been defined.

	The latest report is generated when the project is created or the previous report is submitted.
Not doing	N/A
Acceptance criteria	Submitted reports are presented for financial analysts to review.

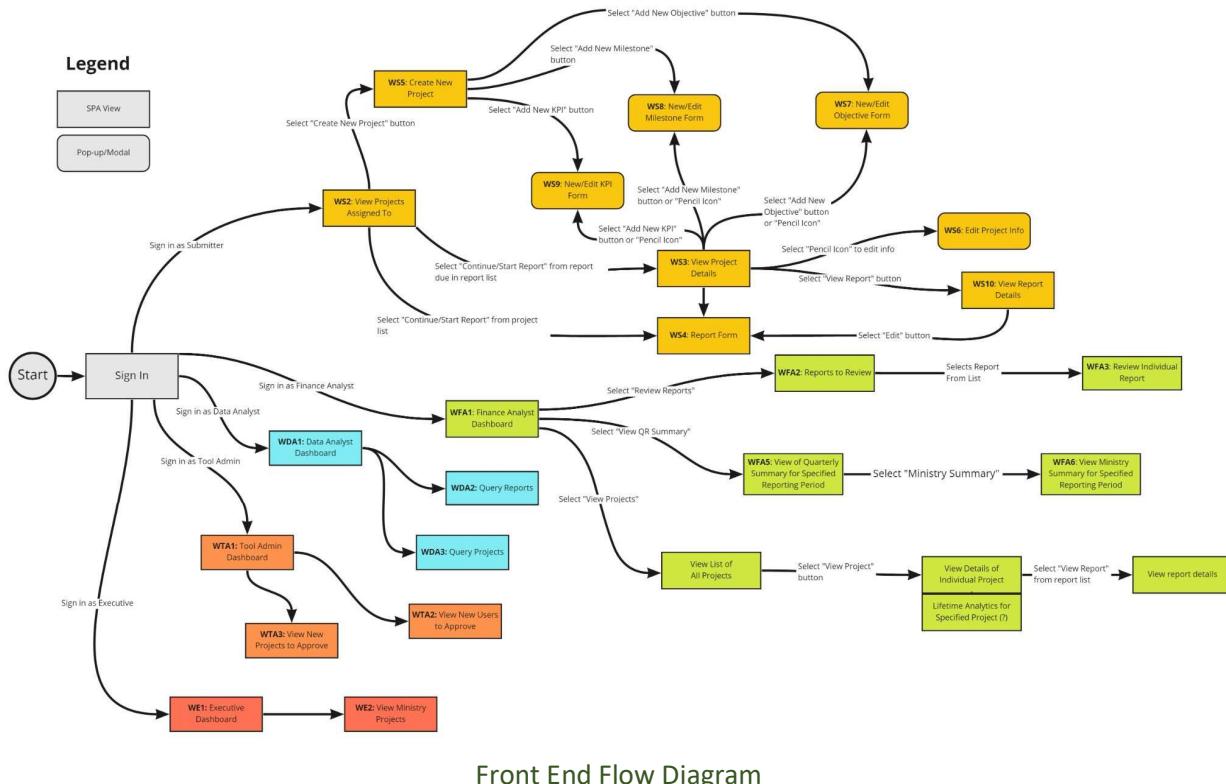
Finance Analyst Reviews Quarterly Report



Feature	Finance Analyst Reviews Quarterly Report
Description	Finance Analysts review and approve the submitted reports.
Purpose	Finance Analysts review and give feedback to submitters and leave notes for executives.
User problem	It is hard to review spreadsheets and communicate through phone calls and emails.
User value	The report is presented in the form that facilitates easy review.
Assumptions	Report has been submitted.
Not doing	N/A
Acceptance criteria	Finance Analysts can update the report's status with a note.

3. User flow and design

Below is our flow diagram for our front end application followed by any wireframes that were created during our design process.



Wireframes

Sign In

BRITISH COLUMBIA Reporting and Dashboard Service Improvement

LOGIN

Username
email@example.com

Password

Sign In

Not Registered? Reach out to X

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Sign In Wireframe

Submitter Wireframes

The screenshot shows a web application interface for managing projects. At the top, there is a header bar with the British Columbia logo, the text "Reporting and Dashboard Service Improvement", and a "LOGOUT" button. Below the header is a table titled "Projects" with columns: Name, CPS Number, Ministry, % Complete, Project Phase, and Next Report Due. Three rows of sample data are listed: Example Project 1, Example Project 2, and Example Project 3. A modal window is open over the table, containing sections for "Project Description", "Q3 Report Due" (dd-mm-yyyy), and "Estimated Date of Project Completion" (05-25-2021). It also includes "Start Report" and "View Project Details" buttons. At the bottom of the page is a footer bar with links: Home, Disclaimer, Privacy, Copyright, and Contact Us.

WS2 - Submitter's Project List

The screenshot shows a "Project Identification" step of a wizard. At the top, there is a header bar with the British Columbia logo, the text "Reporting and Dashboard Service Improvement", and a "LOGOUT" button. Below the header is a navigation bar with five steps: 1. Project Identification, 2. Contacts, 3. Timeline, 4. Business Case Objectives, and 5. KPIs. The first step is highlighted. The main area contains fields for Project Name (Value), Project Description (Value), Ministry Responsible (dropdown menu with "Select"), Program Name (Value), CPS Identifier (Value), and Ministry Project Number (Value). At the bottom are "Back" and "Next" buttons. At the very bottom is a footer bar with links: Home, Disclaimer, Privacy, Copyright, and Contact Us.

WS5-a - Create New Project - Project Identification

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1 Project Identification 2 Contacts 3 Timeline 4 Business Case Objectives 5 KPIs

Project Contacts

Project Sponsor
Value

Project Manager
Value

Financial Contact
Value

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WS5-b - Create New Project - Project Contacts

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1 Project Identification 2 Contacts 3 Timeline 4 Business Case Objectives 5 KPIs

Project Timeline Information

Project Start Date: 2020-01-01 [Edit](#)

Estimated Completion Date: 2020-01-01 [Edit](#)

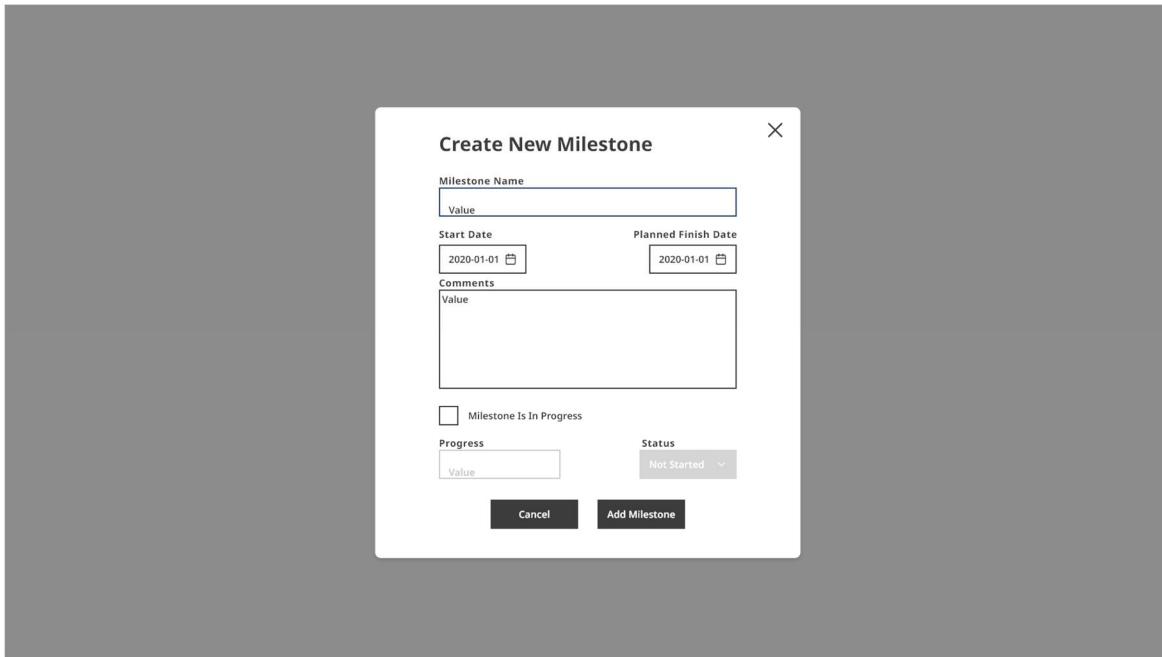
Milestone 1		Delete Edit
Progress	0%	Comments
Status	Not Started	Comments: Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore
Start Date	2020-09-12	
Planned Finish Date	2021-04-07	

[+ Add New Milestone](#)

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WS5-c - Create New Project - Project Timeline



WS8 - Create New Milestone

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1 Project Identification 2 Contacts 3 Timeline 4 Business Case Objectives 5 KPIs

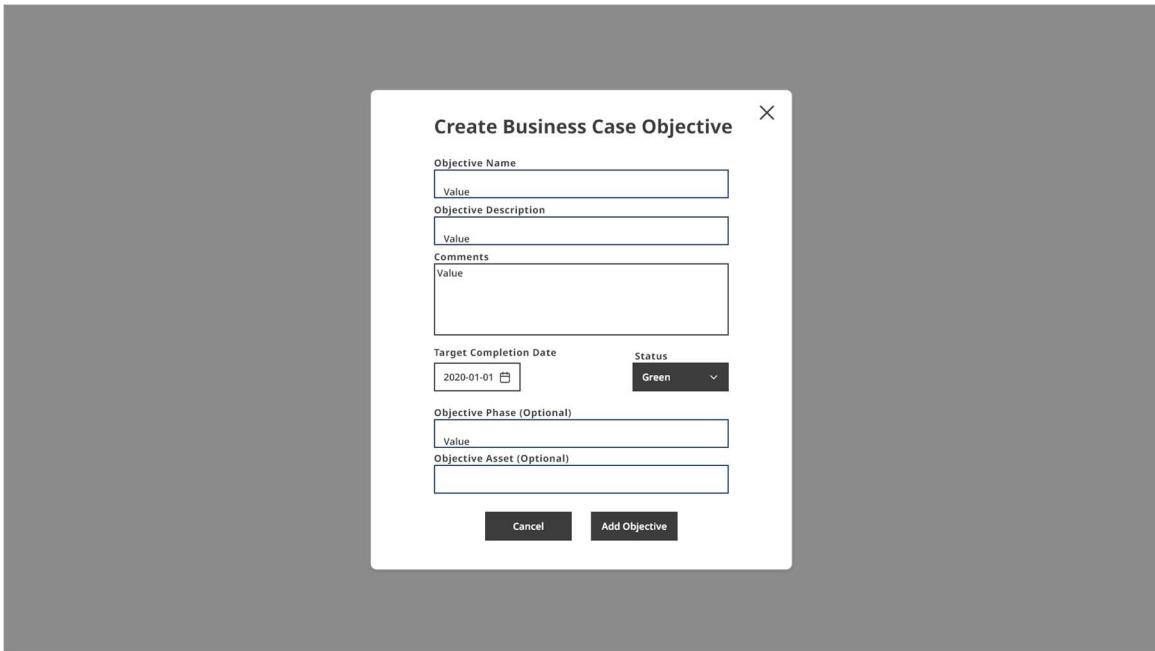
Business Case Objectives

Objective A - Short Objective Description		
Status	Green	Comments
Target Completion Date	2021-11-06	Comments: Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et
Phase	Develop	
Asset	Asset B	

Objective B - Short Objective Description		
Status	Green	Comments
Target Completion Date	2021-11-06	Comments: Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et
Phase	Develop	
Asset	Asset B	

+ Add New Objective

[Back](#) [Next](#)



WS7 - Create Business Case Objective

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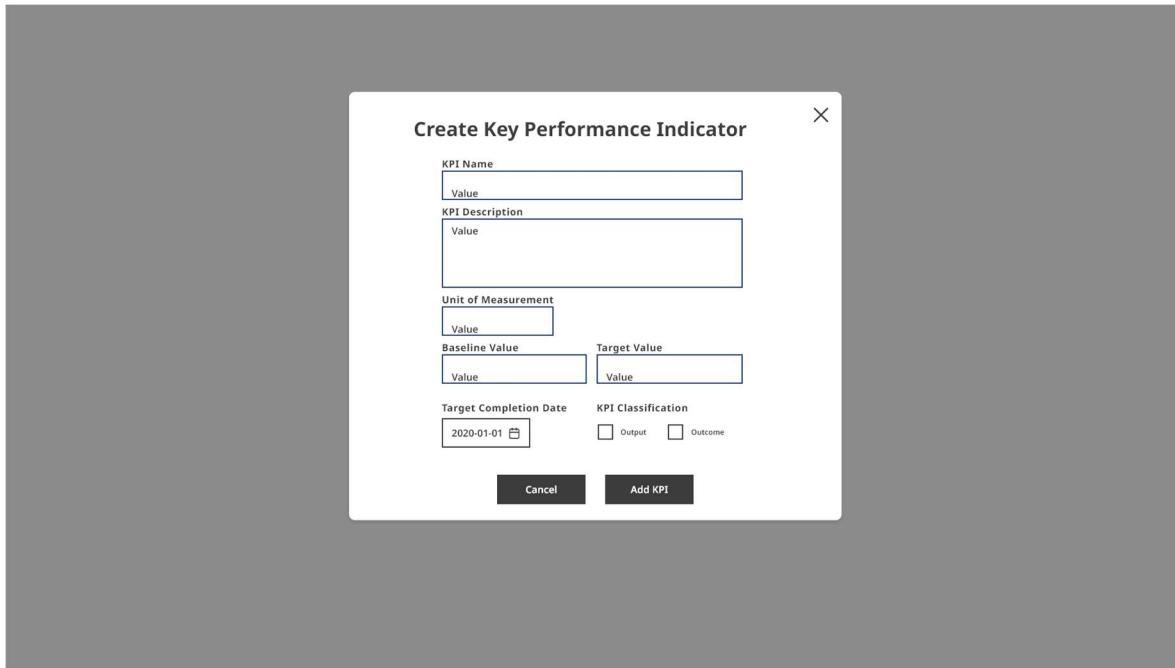
Project Identification Contacts Timeline Business Case Objectives KPIs

Key Performance Indicators

KPI Alpha	Outcome	Target Completion Date 2022-01-15	Edit
Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo.			
Current Progress		\$ 1200	
0%	Baseline	\$ 1200	Target \$ 1600
KPI Beta			
Output		Outcome	Target Completion Date 2022-01-15
Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo.			
Current Progress		45 min	
0%	Baseline	45 min	Target 20 min

[+ Add New KPI](#)

[Back](#) [Submit](#)



WS9 - Create Key Performance Indicators

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< Projects

Example Project - LCTZXXXXXX

Project Information Key Performance Indicators Key Milestones Business Case Objectives Quarterly Status Reports

Project Progress [/](#)

Project Phase	Phase 1 Year 20/21
Estimated Date of Project Completion	05-25-2021
Percent Complete	65%

Project Identification [/](#)

Project Name	Example Project
Project Description	Quarterly report dashboard and management system
Ministry	Citizen Services
Program Name	Digital Investment Office
CPS Identifier	LCTZXXXXXX
Ministry Project Number	ITAXXXXX

Project Contacts [/](#)

Project Sponsor	John Doe
Project Manager	Jane Doe
Financial Contact	Jane Doe

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WS3-a - Project Details - Project Info

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< Projects

Example Project - LCTZXXXXXX

Project Information Key Performance Indicators Key Milestones Business Case Objectives Quarterly Status Reports

KPI Alpha Outcome

Target Completion Date 2022-01-15

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo.

Current Progress \$ 1200

0%

Baseline \$ 1200 **Target** \$ 1600

KPI Beta Output Outcome

Target Completion Date 2022-01-15

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo.

Current Progress 37 min

32%

Baseline 45 min **Target** 20 min

KPI Charlie Output

Target Completion Date 2022-01-15

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo.

Current Progress 7 Screens

60%

Baseline 10 Screens **Target** 7 Screens

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WS3-e - Project Details - Key Performance Indicators

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< Projects

Example Project - LCTZXXXXXX

Project Information Key Performance Indicators Key Milestones Business Case Objectives Quarterly Status Reports

Milestone 1 Edit

Progress	100%	Comments
Status	Complete	Comments. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae
Start Date	2020-09-12	
Planned Finish Date	2021-04-07	

Milestone 2 Edit

Progress	55%	Comments
Status	Green	Comments. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae
Start Date	2020-09-12	
Planned Finish Date	2021-04-07	

Milestone 3 Edit

Progress	0%	Comments
Status	Not Started	Comments. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae
Start Date	2020-09-12	
Planned Finish Date	2021-04-07	

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WS3-c - Project Details - Key Milestones

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< Projects

Example Project - LCTZXXXXXX

Project Information | Key Performance Indicators | Key Milestones | **Business Case Objectives** | Quarterly Status Reports

Objective A - Short Objective Description		
Status	Complete	Comments
Target Completion Date	2021-06-22	Comments: Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae
Phase	Design	
Asset	Asset A	

Objective B - Short Objective Description		
Status	Green	Comments
Target Completion Date	2021-11-06	Comments: Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae
Phase	Develop	
Asset	Asset B	

Objective C - Short Objective Description		
Status	Amber	Comments
Target Completion Date	2021-11-06	Comments: Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae
Phase	Testing	
Asset	Asset C	

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WS3-d - Project Details - Business Case Objectives

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< Projects

Example Project - LCTZXXXXXX

Project Information | Key Performance Indicators | Key Milestones | **Business Case Objectives** | Quarterly Status Reports

Quarterly Status Reports				
Reporting Period	Report Status	Reporting Period Start	Reporting Period End	
Q3a FY 20/21	In Progress	05-21-2021	05-21-2021 ^	
Submitter	John Doe	Report Due	dd-mm-yyyy	Continue Report
Q2 FY 20/21	Reviewed	dd-mm-yyyy	dd-mm-yyyy	
Submitter	John Doe	Overall Project Status	Green	
Date Submitted	dd-mm-yyyy	Project Phase	Phase 1	View Report
Current FY Variance	\$-12,004	Output KPI Progress	45%	
Overall Project Variance	\$-360,004	Outcome KPI Progress	17%	
Q1 FY 20/21	Reviewed	dd-mm-yyyy	dd-mm-yyyy	▼
Q4 FY 19/20	Reviewed	dd-mm-yyyy	dd-mm-yyyy	▼

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WS3-b - Project Details - Quarterly Reports

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1 Project Information 2 Status Summary 3 Financial Information 4 Business Case Objective Tracking 5 Key Milestone Status 6 Key Performance Indicators

Project Information

Project Progress	
Project Phase	Phase 1 Year 20/21
Estimated Date of Project Completion	05-25-2021
Percent Complete	65%

Project Identification	
Project Name	Example Project
Project Description	Quarterly report dashboard and management system
Ministry	Citizen Services
Program Name	Digital Investment Office
CPS Identifier	LCTXXXXXXXX
Ministry Project Number	ITAXXXXXX

Project Contacts	
Project Sponsor	John Doe
Project Manager	Jane Doe
Financial Contact	Jane Doe

I confirm that project information is up to date and accurate

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WS4-a - Complete Quarterly Report - Project Info

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1 Project Information 2 Status Summary 3 Financial Information 4 Business Case Objective Tracking 5 Key Milestone Status 6 Key Performance Indicators

Status Summary

Overall Project Status

Status	Comments
Green	Value
Trend	Value

Scope

Status	Comments
Green	Value
Trend	Value

Budget

Status	Comments
Green	Value
Trend	Value

Schedule

Status	Comments
Green	Value
Trend	Value

Other Issues or Risks

Status	Comments
Green	Value
Trend	Value

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WS4-b - Complete Quarterly Report - Status Summary

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1 Project Information 2 Status Summary 3 Financial Information 4 Business Case Objective Tracking 5 Key Milestone Status 6 Key Performance Indicators

Financial Information

Current Fiscal Year

Current FY Approved Funding	Total Project Budget
Value	Value
Current FY Actuals -	Project Spend To End of Previous FY
Sitting in Ministry	Value
Value	Current FY Full Year Forecasted Spend
JV/ to O&C/O	Value
Value	Projected Funding for Remaining FYS
Current Fiscal Year Full Year Forecasted Spend	Value
Value	Estimated Total Cost
Variance to Budget	Value
Value	Variance to Budget

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WS4-c - Complete Quarterly Report - Financial Info

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Project Information Status Summary Financial Information Business Case Objective Tracking Key Milestone Status Key Performance Indicators

Business Case Objective Tracking

Objective 1 - Short Description

Target Completion Date	Comments
2020-01-01	Value
Status	
Green	

Objective 2 - Short Description

Target Completion Date	Comments
2020-01-01	Value
Status	
Green	
Objective Asset	Objective Phase
Value	Value

Objective 3 - Short Description

Target Completion Date	Comments
2020-01-01	Value
Status	
Green	

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WS4-d - Complete Quarterly Report - Business Case Objectives

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Project Information Status Summary Financial Information Business Case Objective Tracking Key Milestone Status Key Performance Indicators

Key Milestone Status

Milestone 1

Start Date	Status	Comments
2020-01-01	Complete	Value
Planned Finish Date	Progress (%)	
2020-01-01	Value	

Milestone 2

Start Date	Status	Comments
2020-01-01	Green	Value
Planned Finish Date	Progress (%)	
2020-01-01	Value	

Milestone 3

Start Date	Status	Comments
2020-01-01	Red	Value
Planned Finish Date	Progress (%)	
2020-01-01	Value	

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WS4-e - Complete Quarterly Report - Key Milestones

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1 Project Information 2 Status Summary 3 Financial Information 4 Business Case Objective Tracking 5 Key Milestone Status 6 Key Performance Indicators

Key Performance Indicators

KPI Alpha Target Completion Date: 2020-01-01 Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Baseline: \$1200 Target: \$1600	Current Progress (\$) Value
KPI Beta Target Completion Date: 2020-01-01 Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Baseline: 45 min Target: 20 min	Current Progress (min) Value

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WS4-f - Complete Quarterly Report - Key Performance Indicators

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< Project Details [Download CSV](#)

20/21 FY Q2 - Example Report
Reporting Period From dd-mm-yy to dd-mm-yy

[Edit Report](#) [Submit Report](#)

[Project Information](#) [Status Summary](#) [Financials](#) [Business Case Objectives](#) [Key Milestone Status](#)

Project Progress

Project Phase	Phase 1 Year 20/21
Estimated Date of Project Completion	05-25-2021
Percent Complete	65%

Project Identification

Project Name	Example Project
Project Description	Quarterly report dashboard and management system.
Ministry	Citizen Services
Program Name	Digital Investment Office
CPS Identifier	LCTXXXXXXXX
Ministry Project Number	ITAXXXXXXX

Project Contacts

Project Sponsor	John Doe
Project Manager	Jane Doe
Financial Contact	Jane Doe

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WS10-a - Quarterly Report Details - Project Info

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< Project Details
20/21 FY Q2 - Example Report
 Reporting Period From dd-mm-yy to dd-mm-yy

[Download CSV](#) [Edit Report](#) [Submit Report](#)

Project Information Status Summary Financials Business Case Objectives Key Milestone Status

Overall Project Status	Trend	Scope	Trend	Budget	Trend	Schedule	Trend	Other Issues or Risks	Trend
Comments	Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam,	Comments	Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam,	Comments	Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam,	Comments	Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam,	Comments	Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam,

Key Performance Indicators (KPIs)

KPI Alpha Target Completion Date 2022-01-15 Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Current Progress \$ 1200 Baseline \$ 1200 Target \$ 1600	KPI Beta Target Completion Date 2022-01-15 Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Current Progress 37 min Baseline 45 min Target 20 min
KPI Charlie Target Completion Date 2022-01-15 Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Current Progress 7 Screens Baseline 10 Screens Target 7 Screens	

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WS10-b - Quarterly Report Details - Status Summary

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< Project Details
20/21 FY Q2 - Example Report
 Reporting Period From dd-mm-yy to dd-mm-yy

[Download CSV](#) [Edit Report](#) [Submit Report](#)

Project Information Status Summary Financials Business Case Objectives Key Milestone Status

Current Fiscal Year Financial Information	
Sitting In Ministry	100,000
JV'd to OCIO	25,000
Current FY Actuals	125,000
Current FY Approved Funding	190,000
Current FY Full Year Forecasted Spend	200,000

Overall Project Financial Information	
Project Spend to End of Previous FY	320,000
Current FY Full Year Forecasted Spend	200,000
Projected Funding for Remaining FYs	164,550
Total Project Budget	540,000
Estimated Total Cost	540,231
Variance to Budget	-231

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WS10-c - Quarterly Report Details - Financial Info

 BRITISH COLUMBIA Reporting and Dashboard Service Improvement [LOGOUT](#)

< Project Details
20/21 FY Q2 - Example Report
 Reporting Period From dd-mm-yy to dd-mm-yy

[Download CSV](#) [Edit Report](#) [Submit Report](#)

Project Information Status Summary Financials **Key Milestone Status** Business Case Objectives

Milestone 1		
Progress	100%	Comments
Status	Complete	Comments. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae
Start Date	2020-09-12	
Planned Finish Date	2021-04-07	

Milestone 2		
Progress	55%	Comments
Status	Green	Comments. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae
Start Date	2020-09-12	
Planned Finish Date	2021-04-07	

Milestone 3		
Progress	0%	Comments
Status	Not Started	Comments. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae
Start Date	2020-09-12	
Planned Finish Date	2021-04-07	

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WS10-d - Quarterly Report Details - Key Milestones

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< Project Details
20/21 FY Q2 - Example Report
 Reporting Period From dd-mm-yy to dd-mm-yy

[Download CSV](#) [Edit Report](#) [Submit Report](#)

Project Information Status Summary Financials **Key Milestone Status** **Business Case Objectives**

Objective A - Short Objective Description		
Status	Completed	Comments
Target Completion Date	2021-06-22	Comments. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae
Phase	Design	
Asset	Asset A	

Objective B - Short Objective Description		
Status	Green	Comments
Target Completion Date	2021-11-06	Comments. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae
Phase	Develop	
Asset	Asset B	

Objective C - Short Objective Description		
Status	Yellow	Comments
Target Completion Date	2021-11-06	Comments. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae
Phase	Testing	
Asset	Asset C	

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WS10-e - Quarterly Report Details - Business Case Objectives

Finance Analyst Wireframes

 BRITISH COLUMBIA Reporting and Dashboard Service Improvement [LOGOUT](#)

Finance Analyst Dashboard

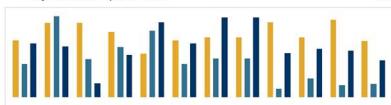
Q2 FY 20/21 Quarterly Reporting Period

Category	Count
Reports Not Started	22
Reports In Progress	34
Reports Submitted to DIO	26
Reports That Require Follow Up	2
Reports Approved	10

[Review Reports >](#) [Q2 FY 20/21 Summary >](#)

FY 20/21 Projects

Category	Count
Projects To Start This FY	22
Projects Currently In Progress	34
Projects To Complete This FY	26



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WFA1 - Finance Analyst Dashboard

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Q3 FY 20/21 - Quarterly Status Reports to Review

Project Name	CPS Identifier	Flagged Issues	Date Submitted
Example Project Alpha	LCTZXXXXXX	0	05-21-2021 ▼
Example Project Beta	LCTZXXXXXX	0	dd-mm-yyyy ▲
Submitter Ministry	John Doe Citizens Services	Overall Project Status Green Project Phase Phase 1	Review Report
Current FY Approved Funding	\$120,000	Overall Project Budget	\$1,243,000
Current FY Actuals	\$95,000	Projected Funding Remaining	\$786,000
Current FY Forecast Spend	\$132,004	Estimated Total Cost	\$1,603,004
Current FY Variance	\$-12,004	Overall Project Variance	\$-360,004
Example Project Charlie	LCTZXXXXXX	1	dd-mm-yyyy ▼
Example Project Delta	LCTZXXXXXX	5	dd-mm-yyyy ▼

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WFA2 - Reports to Review

BRITISH COLUMBIA Reporting and Dashboard Service Improvement

Reporting Period From dd-mm-yy to dd-mm-yy

Project Information Status Summary Financials Business Case Objectives Key Milestone Status

Project Progress

Project Phase Phase 1 Year 20/21

Estimated Date of Project Completion 05-25-2021

Percent Complete 65%

Project Identification

Project Name Example Project

Project Description Quarterly report dashboard and management system.

Ministry Citizen Services

Program Name Digital Investment Office

CPS Identifier LCTXXXXXXXX

Ministry Project Number ITAXXXXXX

Project Contacts

Project Sponsor John Doe

Project Manager Jane Doe

Financial Contact Jane Doe

Set Status ^

Submitted Requires Follow Up Reviewed

QR Notes

Issues

Issue A Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem

Issue B Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem

Issue C Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem

Issue D Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem

Issue E Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem

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WFA3-a - Review Report - Project Info

BRITISH COLUMBIA Reporting and Dashboard Service Improvement

Reporting Period From dd-mm-yy to dd-mm-yy

Project Information Status Summary Financials Business Case Objectives Key Milestone Status

Overall Project Status Trend **Scope** Trend **Budget** Trend **Schedule** Trend **Other Issues or Risks** Trend

KPI Alpha **Output** Target Completion Date 2022-01-15

KPI Beta **Output** Target Completion Date 2022-01-15

KPI Charlie **Output** Target Completion Date 2022-01-15

Key Performance Indicators (KPIs)

Set Status ^

Submitted Requires Follow Up Reviewed

QR Notes

Issues

Issue A Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem

Issue B Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem

Issue C Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem

Issue D Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem

Issue E Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem

WFA3-b - Review Report - Status Summary

BRITISH COLUMBIA Reporting and Dashboard Service Improvement

Reporting Period From dd-mm-yy to dd-mm-yy

Project Information Status Summary **Financials** Business Case Objectives Key Milestone Status

Current Fiscal Year Financial Information	
Sitting In Ministry	100,000
JV'd to OCIO	25,000
Current FY Actuals	125,000
Current FY Approved Funding	190,000
Current FY Full Year Forecasted Spend	200,000
Variance to Budget	-10,000

Overall Project Financial Information	
Project Spend to End of Previous FY	320,000
Current FY Full Year Forecasted Spend	200,000
Projected Funding for Remaining FYs	164,550
Total Project Budget	540,000
Estimated Total Cost	540,231
Variance to Budget	-231

Set Status **Submit Review**

Submitted Requires Follow Up Reviewed

QR Notes

Issues

- Issue A Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem
- Issue B Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem
- Issue C Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem
- Issue D Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem
- Issue E Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem

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WFA3-c - Review Report - Financial Info

BRITISH COLUMBIA Reporting and Dashboard Service Improvement

Reporting Period From dd-mm-yy to dd-mm-yy

Project Information Status Summary **Financials** Business Case Objectives Key Milestone Status

Milestone 1	
Progress	100%
Status	Complete
Start Date	2020-09-12
Planned Finish Date	2021-04-07

Comments	
Comments. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae	

Milestone 2	
Progress	55%
Status	Green
Start Date	2020-09-12
Planned Finish Date	2021-04-07

Comments	
Comments. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae	

Milestone 3	
Progress	0%
Status	Not Started
Start Date	2020-09-12
Planned Finish Date	2021-04-07

Comments	
Comments. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae	

Set Status **Submit Review**

Submitted Requires Follow Up Reviewed

QR Notes

Issues

- Issue A Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem
- Issue B Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem
- Issue C Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem
- Issue D Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem
- Issue E Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem

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WFA3-d - Review Report - Business Case Objectives

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Reporting Period From dd-mm-yy to dd-mm-yy

Project Information Status Summary Financials Business Case Objectives Key Milestone Status

Objective A - Short Objective Description

Status	Complete	Comments
Target Completion Date	2021-06-22	Comments. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae
Phase	Design	
Asset	Asset A	

Objective B - Short Objective Description

Status	Green	Comments
Target Completion Date	2021-11-06	Comments. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae
Phase	Develop	
Asset	Asset B	

Objective C - Short Objective Description

Status	Yellow	Comments
Target Completion Date	2021-11-06	Comments. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae
Phase	Testing	
Asset	Asset C	

[Set Status](#) [Submit Review](#)

QR Notes

Submitted
Requires Follow Up
Reviewed

Issues

Issue A	Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem
Issue B	Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem
Issue C	Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem
Issue D	Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem
Issue E	Issue description. Sed ut perspiciatis unde omnis iste natus error sit voluptatem

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WFA3-e - Review Report - Key Milestones

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◀ Back to Quarterly Report Summaries

Q2 ▾ 20/21 ▾ [Download CSV](#)

Quarterly Report Summary for Q2 FY 20/21 [View Ministry Summary](#)

Ministry	CPS Number	Name	Variance	Issues Flagged	Report Submitted
CITZ	LCTXXXXXXXXX	Example Project	45 %	2	05-21-2021 ▾
CITZ	LCTXXXXXXXXX	Example Project	-14 %	0	dd-mm-yyyy ▾
Submitter	John Doe	Scope	Green		
Ministry	Citizens Services	Budget	Yellow		
QR Notes	Quarterly report dashboard and management system. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam rutrum vitae massa eu	Schedule	Green		View Report Details
		Other Risks	Red		
Sitting in Ministry	\$74,000	March Funding Letters	\$120,000		
Actual Spend JV'd to OCIO	\$17,250	Budget at End of Quarter	\$120,000		
		Current FY Forecast Spend	\$132,004		
		Current FY Variance	\$-12,004		
CITZ	LCTXXXXXXXXX	Example Project	45 %	0	05-21-2021 ▾
CITZ	LCTXXXXXXXXX	Example Project	45 %	0	05-21-2021 ▾
CITZ	LCTXXXXXXXXX	Example Project	45 %	0	05-21-2021 ▾
CITZ	LCTXXXXXXXXX	Example Project	45 %	0	05-21-2021 ▾
CITZ	LCTXXXXXXXXX	Example Project	45 %	0	05-21-2021 ▾
CITZ	LCTXXXXXXXXX	Example Project	45 %	0	05-21-2021 ▾
CITZ	LCTXXXXXXXXX	Example Project	45 %	0	05-21-2021 ▾
CITZ	LCTXXXXXXXXX	Example Project	45 %	0	05-21-2021 ▾
CITZ	LCTXXXXXXXXX	Example Project	45 %	0	05-21-2021 ▾
CITZ	LCTXXXXXXXXX	Example Project	45 %	0	05-21-2021 ▾
					Ministry Summary

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WFA5 - Quarterly Report Summary - All Reports (Not Implemented)

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Quarterly Report Summary for Q2 FY 20/21

Ministry	20/21 Allocation	Approved Changes	Budget (Q2)	Ministry's Q2 Forecast	Variance to Allocation	Variance	Actuals (M\$)
CITZ	900,000	120,000	1,020,000	1,020,000	-	0%	600,000
ECON	900,000	120,000	1,020,000	1,020,000	-	0%	600,000
EDUC	900,000	120,000	1,020,000	1,020,000	-	0%	600,000
HLTH	900,000	120,000	1,020,000	1,020,000	-	0%	600,000

Ministry's Budget, Forecast, and Actuals to Q2

WFA6 - Quarterly Report Summary - Ministry Summary (Not Implemented)

Key Performance Indicators (KPIs)

Simple KPIs were implemented in our prototype where each KPI had a baseline value, a target value, a target completion date, a unit to measure the KPI, a description, and a name. However, some KPIs are progression and may have multiple target dates with expected values to track a KPI's progression. Wireframes below show how KPIs can be expanded to provide project analytics and express progression KPIs instead of the linear point 'a' to point 'b' tracking implemented in the prototype.

☰ BRITISH COLUMBIA Reporting and Dashboard Service Improvement LOGOUT

⚠ Q3a Status Report Due dd-mm-yy

Project Information Key Performance Indicators Key Milestones Business Case Objectives Quarterly Status Reports

KPI Summary for Example Project

Not Meeting Target 1
On Track 2
Exceeding Target 0!

KPI Alpha 0% KPI Beta 32% KPI Charlie 67%

KPI Progression for Example Project

KPI Alpha: Expected (green), Actual (blue)
KPI Beta: Expected (blue), Actual (red)
KPI Charlie: Expected (red), Actual (dark red)

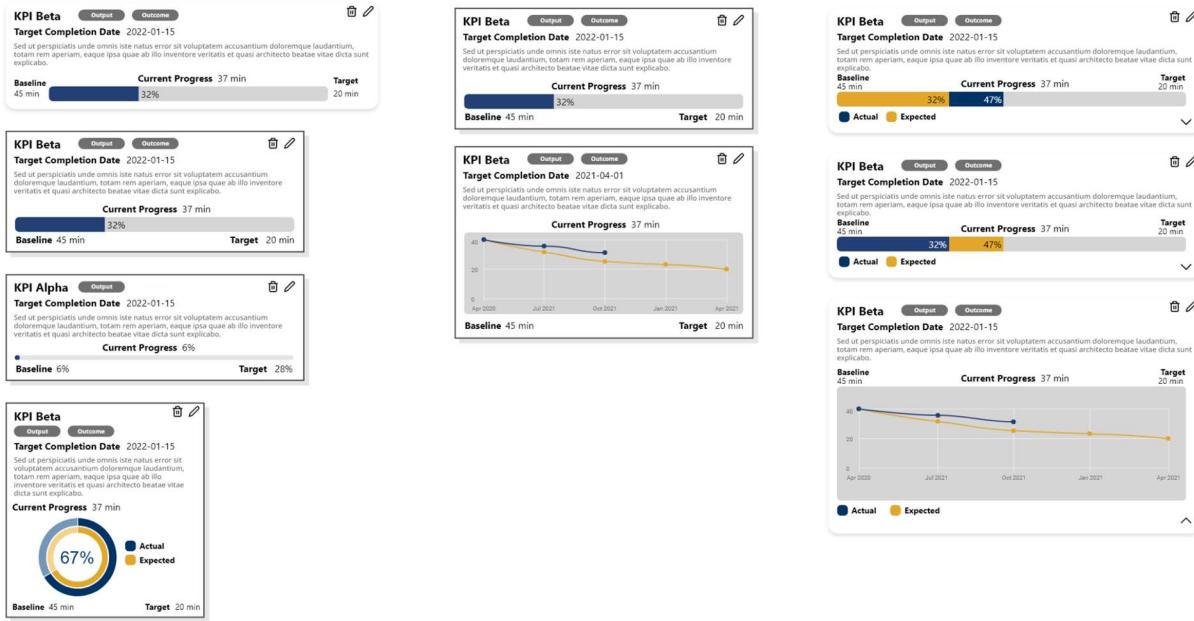
KPI Alpha Outcome Target Completion Date 2022-01-15 Current Progress \$ 1200 Baseline \$ 1200 Target \$ 1600

KPI Beta Outcome Target Completion Date 2022-01-15 Current Progress 37 min Baseline 45 min Target 20 min

KPI Charlie Outcome Target Completion Date 2022-01-15 Current Progress 7 Screens Baseline 10 Screens Target 7 Screens

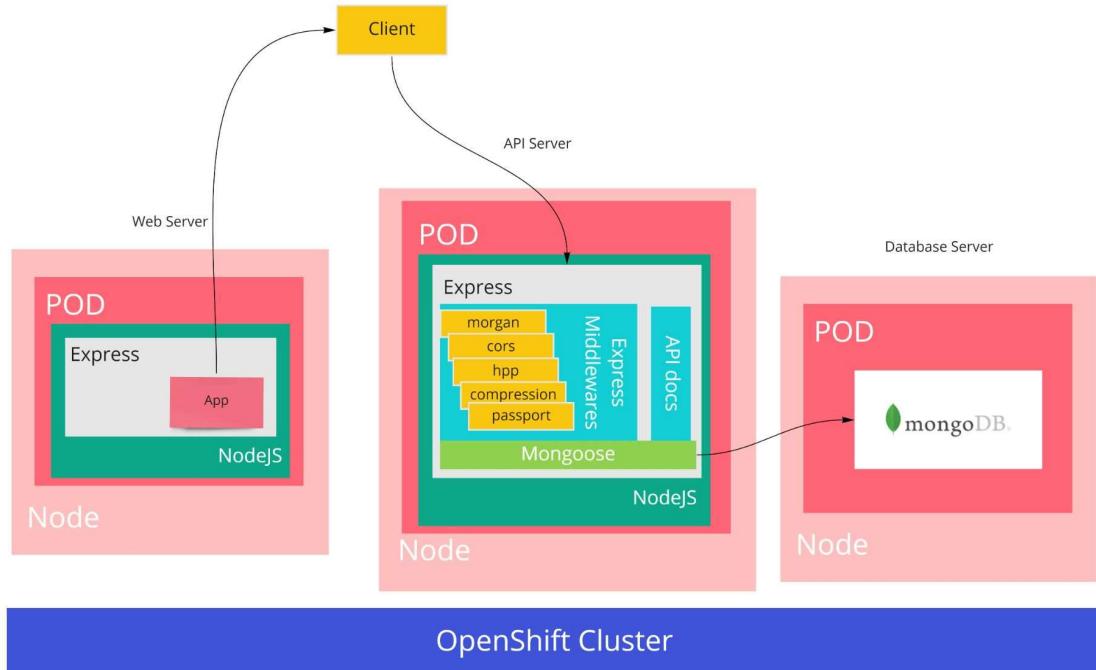
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Example of possible KPI Summary Widgets



Example of possible KPI Card Widgets

4. System Architecture



System Architecture Diagram

5. Release Criteria

Release	Release 0.1.1
Date	Jun 21, 2021
Milestones	Project Navigation
Features	Submitter Creates New Project
Dependencies	N/A

Release	Release 0.1.2
Date	Jul 8, 2021
Milestones	Quarterly Report
Features	Submitter Completes Quarterly Report
Dependencies	Release 0.1.1

Release	Release 0.1.3
Date	Jul 22, 2021
Milestones	Business Rules & Performance Charts
Features	Finance Analyst Reviews Quarterly Report
Dependencies	Release 0.1.2

6. Success metrics

Due to this being a continuing project, success is defined by the creation of a solution with handover documentation and the delivery of a proof-of-concept prototype to demonstrate that solution.

- **Deliver solution with handover documentation:**
 - Must facilitate consistent and reliable data entry and storage.
 - Should describe personas and identify their key goals, concerns, and success definitions.
 - Must be designed to meet the needs of the users defined in the personas.
 - Must integrate key performance indicators in the new quarterly reporting journeys.
 - Must use automation to reduce manual effort in the quarterly reporting process.
 - Should result in a simple application that is easy to use for even non-technical users.
 - Must include reasoning for architecture and technology choices.
 - Must include documentation for the prototype delivered.
 - Must include documentation for future features to develop.

- **Deliver a working prototype:**
 - Must be hostable on a distributed environment such as the BC Government's OpenShift environment.
 - Must implement core Submitter journeys, create a new project and complete a quarterly report.
 - Must implement the Finance Analyst report review journey.
 - Must demonstrate integration of key performance indicators into the quarterly reporting process.
 - Should demonstrate some level of automation in the quarterly reporting process.
 - Must have the "look and feel" of a BC Government web application.

Key performance indicator	Baseline	Target	Timeframe
Create wireframes for different front end application views.	0 views	14 views	End of Sprint 2
Create wireframes for different ways to display project KPIs.	0 displays	3 displays	End of Sprint 5
Develop at least one persona for each persona type to document our user research and describe how we expect our users to interact with our application.	0 personas	5 personas	End of Sprint 2
Deliver an alpha prototype that implements the foundational user journeys via a GitHub repository.	0 journeys	3 journeys	End of Sprint 5
Create API definitions to allow our application to interface with a database. Integration with future additional systems should be considered.	0 API definitions	50 API definitions	End of Sprint 5

7. Constraints:

Constraint/Risk	Likelihood (H,M,L)	Impact (H,M,L)	Owner (who manages the constraint/risk)	Mitigating Actions
<p>Project to be delivered on OpenShift 4.0.</p> <ul style="list-style-type: none"> - Requires training to develop for a containerized environment. - Requires training to understand OpenShift Platform. - Requires training for deploying to the platform. 	H	M	Project Team	Accept. Team will invest time to learn this new platform under the guidance of the Sponsor's Technical Lead.
<p>Existing non-linear processing flow is not geared towards a web form based project.</p> <ul style="list-style-type: none"> - Requires stakeholder engagement. - Requires understanding gaps in the financial processes. - Experimenting with possible UX/UI designs for effective transformation of the existing process. 	H	H	Sponsor	Allocate two sprints to analyze data and define rules. Hold meetings with stakeholders.
<p>Defined 12 week development cycle limits the number of feature points that can be delivered.</p> <ul style="list-style-type: none"> - Requires time management. - Requires Agile approach; developing backlog & frequent stakeholder engagement. - Need to design for robustness and extensibility. 	H	H	Sponsor	Determine which features are a priority to implement with the Capstone team.

8. Future work

Refer to [the complete list of proposed features](#)

Future features	Purpose	Priority	Timeframe
Executive Dashboard	Help inform strategic decision making	High	TBD
Realtime Notifications	Allow users to view changes instantly	High	TBD
Query Functionality	Search for projects and reports	High	TBD
User Management	Approve registration and update profiles	High	TBD
Database Management	Back up / restore / import data	Medium	TBD
Single Sign-On	Integration with IDIR authentication	High	TBD
Change History	Track data changes	Medium	TBD
Audit Trail	Capture project related communication updates/changes	High	TBD
Access Control	Roles based access to functionality and data	High	TBD