**Wyman SharePoint New/Revised Spec Workflow Development Proposal**

**Project Objectives and Scope**

The objective of this project is the development of a custom workflow solution in SharePoint to help the organization in the Approval of New/Revised Spec basis on the following requirements:

1. Allow the Tech Writer to submit a New/Revised Spec to one or more group areas in the Organization for Review.
2. New/Revised Spec Workflow will be initialized and will notify internal/external reviewees via email that a New/Review Spec was submitted by Tech Writer.
3. Allow internal/external reviewees to submit an acknowledgement that the New/Revised Spec has been received.
4. Allow the internal/external reviewee(s) to review document submitted by Tech Writer and add review status (Accept, Accept with Comments or Reject) by using an Approval Form.
5. New/Revised Spec Workflow will send out a Notification via email to internal/external reviewee(s) that New/Revised Spec Revision has reached 5 days without any acknowledgement that the New/Revised Spec has been received.
6. New/Revised Spec Workflow will send out a Notification via email to internal/external reviewee(s) that New/Revised Spec Revision has reached 10 days without document review and change status.
7. New/Revised Spec Workflow will send out a Notification via email to internal/external reviewee(s) that New Spec or Revised Spec Revision has reached 20 days without document review and change status.
8. New/Revised Workflow will send out a Notification via email to Tech Writer when New/Revised Spec Revision has reached 30 days without any document review and change status. Allow the Tech Writer to escalate this New/Revised Spec Revision to Management for action.
9. Tech Writer Dashboard should be displaying New/Revised Spec Records submitted by Tech Writer pending for Approval. New/Revised Spec Records should be displaying in green color if the record just got created. New/Revised Spec Records should be displaying in yellow color if records has reach 10 days without document review and change status. New/Revised Spec Records should be displaying in red color if records has reached 20 or 30 days without document review and change status.
10. New/Revised Workflow will send out just one Notification via email to Tech Writer when New Spec or Revised Spec Revision has been accepted by all reviewee(s) without restrictions or document changed request.
11. New/Revised Spec Workflow will send out a Notification vial email to Tech Writer when New Spec or Revised Spec Revision has been denied by reviewee(s).
12. Management Dashboard should be displaying New/Revised Spec records that has reached 30 days without document review and change status.
13. Allow the Tech Writer to send out an acknowledgment that New/Revised Spec Approval response has been received.
14. New/Revised Spec Workflow will send out a Notification via email to tech writer that New Spec or Revised Spec Revision has reached 5 days without implementation.
15. Tech Writer Dashboard should be displaying New/Revised Spec Records waiting for implementation. New/Revised Spec Records should be displaying in green color if records has not reached 5 days without implementation. New/Revised Spec Records should be displaying in red color if records has reach 5 days without implementation.
16. Tech Writer Dashboard should be displaying New/Revised Spec Records that has been rejected by Approval Managers.
17. Tech Writer Dashboard should be displaying New/Revised Spec Records that has been accepted by Approval Managers.
18. Tech Writer Dashboard should be displaying New/Revised Spec Records that has been accepted with comments by Approval Managers.
19. Allow the Tech Writer to implement a New/Revised Spec that has been accepted with comments by:
    1. filling out an exception form
    2. Work with the Customer to change the document.
20. Allow the Tech Writer if New/Revised Spec Revision has been accepted with or without restrictions or document changed request to upload New Spec or Revised Spec to MSQS (Oracle).

**Build Phase**

Develop a Custom Form to allow a Tech Writer to submit a New/Revised Spec to one or more group areas in the Organization for Review.

Develop an Approval Form to allow the internal/external reviewee(s) to review document submitted by Tech Writer and add review status (Accept, Accept with Comments or Reject). If New/Revised Spec is rejected a comments must be provided by reviewee(s).

Develop Tech Writer Dashboard according to requirements

Develop Management Dashboard according to requirements

Develop an Exception Form to allow Tech Writer to implement a New/Revised Spec approved with comments by Approval Managers

Develop a Review Form to allow a Tech Writer to implement a New/Revised Spec approved with comments by Approval Managers

**Build Phase Deliverables**

New/Revised Spec Custom Workflow Implementation

**Training/Testing Phase**

**System Testing** – We will work with key users and subject matter experts to test the functionality of the various elements of the workflow. Issues identified will be remediated and retested

**Training/Testing Phase Deliverables**

A fully tested New/Revision Spec Workflow

**Project Estimate in Hours**

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| **Role Description** | **Hours** |
| Develop a Custom Form to allow a Tech Writer to submit a New/Revised Spec to one or more group areas in the Organization for Review. | 40 Hrs. |
| Develop an Approval Form to allow the internal/external reviewee(s) to review document submitted by Tech Writer and add review status (Accept, Accept with Comments or Reject). If New/Revised Spec is rejected a comments must be provided by reviewee(s). | 40 Hrs. |
| Develop Tech Writer Dashboard according to requirements. | 40 Hrs. |
| Develop Management Dashboard according to requirements. | 20 Hrs. |
| Develop an Exception Form to allow Tech Writer to implement a New/Revised Spec approved with comments by Approval Managers. | 20 Hrs. |
| Develop a Review Form to allow a Tech Writer to implement a New/Revised Spec approved with comments by Approval Managers. | 40 Hrs. |