Operational Concept Description (OCD)

United Direct Marketing

Team 9

Fall Semester
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5/3/2013

Version History

Date	Author	Version	Changes made	Rationale
09/27/12	YKK	1.0	• Original template for use with United Direct Marketing v1.0	• Initial draft for use with United Direct Marketing
10/10/12	YKK	1.1	• Redraw Figure 1. Update Figure 3, Table 2 • Update staff names listing • Update section 1.2, 2.2	• Correction • Bug fixing [7061] • Requirement modification requested by the client. Bug fixing [7062]
10/13/12	YKK	2.0	• Added section 3.2, 3.3, 3.4	• Evolving the document to the status as Core Foundation Commitment package based on data from Winbook
10/23/12	YKK	2.1	• Updated section 3.2.4, 3.2.5, 3.4.2	• Bug fixing [7214] [7215] [7216] [7217] [7218] [7219] [7220]
11/03/12	YKK	2.2	• Updated section 3.2	• Bug fixing [7442]
11/19/12	YKK	3.0	• Updated section 2.3, 3.3	• Evolving the document to the status as Development Commitment
1/27/13	YKK	3.1	• Updated section 2.3, 3.3	• Fixing [8096]
1/27/13	KZ	3.2	• Fixed spelling and grammar typos throughout the document • Updated team member list with members from Spring semester	• Correcting typos • Updating with new team roster
2/20/2013	SA	4.0	• Changed from Architected Agile to Single NDI. Looked through the document to remove references to Architected Agile.	• Comments from the recent review that the team should switch to NDI.
3/31/2013	SA	4.1	• Updating for IOC1	• IOC1 due
5/3/2013	SA	4.2	• Verify ready for IOC3	• IOC3 due

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1. Introduction

1.1 Purpose of the OCD

This document provides, in detail, the shared visions and goals of the success-critical stakeholders of United Direct Marketing System. The success-critical stakeholders of the project are Samta Jain, as the president and owner of the company; the project manager, the project assistants, clients as users; Team 9 members in CSCI 577 2012, as the developer team.

1.2 Status of the OCD

The status of the OCD is currently at the version number 3.1 in the beginning of the development phase. The current system has been analyzed and the operational concept of the current system has been assessed. The scope of the new system is to improve the process of building up projects and turn whole programs into an integrated internet system. The document is updated as per the exit criteria of the Foundation Commitment Review.

2. Shared Vision

Table 1: The Program Model

Assumptions
· Clients needs more convenient methods to access projects.
· Increasing sample project requests from prospective clients.

Stakeholders (who)	Initiatives (What)	Value Propositions (Why)	Beneficiaries (For Whom)
· Developers, IV &V · Graphic designer · UDM(company) · Project manager · Client · Prospective Client · Project assistant	· Develop virtual encrypted link to micro website · Automate personalized project webpage buildup procedure · Advertise successful client cases to public · Exhibit periodic advertisements to public · Provide training project assistants	· Faster project process · Increase the brand equity of UDM(company). · Strengthened competitiveness of UDM(company).	· UDM(company) · Proposal manager · Client · Prospective Client

2.1 Benefits Chain

Assumptions :
· Clients needs more convenient method to access projects.
· Increasing sample project requests from prospective clients.

Developers, IV &V

Project manager,
Client,
Prospective Client

Developers, IV &V,
Project manager,
Project assistant

Develop virtual encrypted link to micro website

Advertise successful client cases to public

Automate personalized project webpage buildup procedure

Increase security and protection for UDM projects

Abundant successful showcases

Automation of project Web pages buildup

Faster project process

Variety projects prototype

Increase the brand equity of UDM(company)

Better productivity, Better user experience, Higher public exposure

Strengthened competitiveness of UDM(company)

Faster operation and production processes of new system

Variety of advertisement materials

Provide training project assistants

Exhibit periodic advertisements to public

Project manager,
Project assistant

Project manager,
Project assistant,
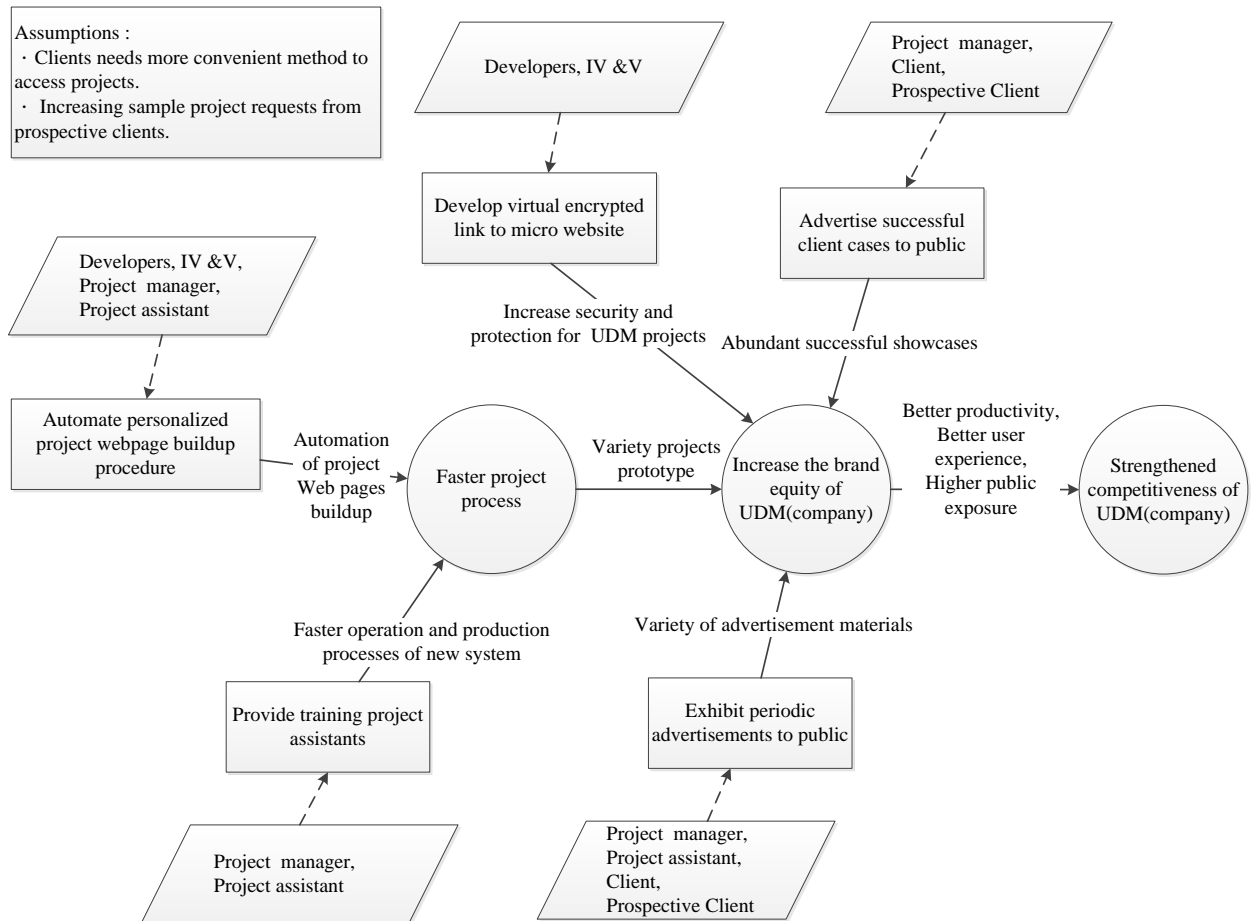Client,
Prospective Client

Figure 1: Benefits Chain Diagram

2.2 System Capability Description

- The UDM system is a web based service both applied to inside the intranet of the company UDM(United Direct Marketing) and publicly to clients.
- The target customers for the system are both employees at UDM and clients.
- The UDM system is able to provide a customized web page for each client and personalized proposal for client review and comment.
- The UDM system is able to provide a listing of archived advertisement.
- The UDM system is able to provide a subscription to an e-newsletter.
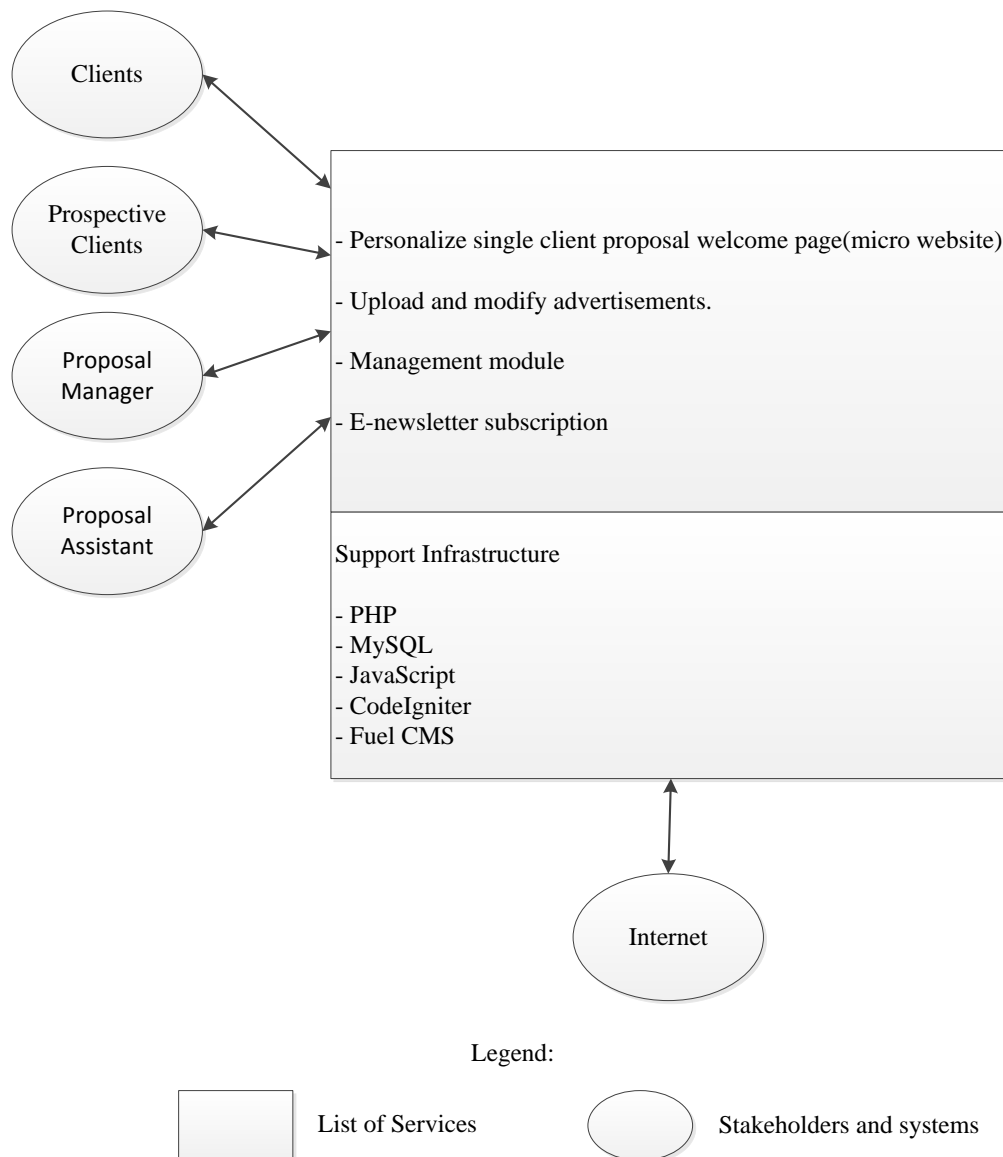
2.3 System Boundary and Environment

Clients

Prospective Clients

Proposal Manager

Proposal Assistant

- Personalize single client proposal welcome page(micro website)

- Upload and modify advertisements.

- Management module

- E-newsletter subscription

Support Infrastructure

- PHP
- MySQL
- JavaScript
- CodeIgniter
- Fuel CMS

Internet

Legend:

List of Services

Stakeholders and systems

Figure 2: System Boundary and Environment Diagram of United Direct Marketing System

3.   System Transformation

3.1 Information on Current System

3.1.1   Infrastructure

The client subscribes a web host plan from Newtek Network Services (http://www.thesba.com/). The current website system is running on that web host. The software platform of the current website system is Coldfusion 10 running on Windows Server. There is a database used inside the company now which is MS Access connected through JDBC+ODBC. On the other hand, employees in the company at this moment use only email to deliver proposals to clients and receive modification information. In other words, website and proposal procedure are now in different and unrelated environments. The web host can support PHP and MySQL.

3.1.2   Artifacts

Table 2: Artifacts

| Artifact	Description
Hand-picked proposal procedure	The only way to produce a proposal right now is to copy from an old file and customize the client information on it. Although proposals provided from UDM are very alike from one to another at the moment, there are no templates and no modular mechanism to automate the whole procedure.

3.1.3   Current Business Workflow
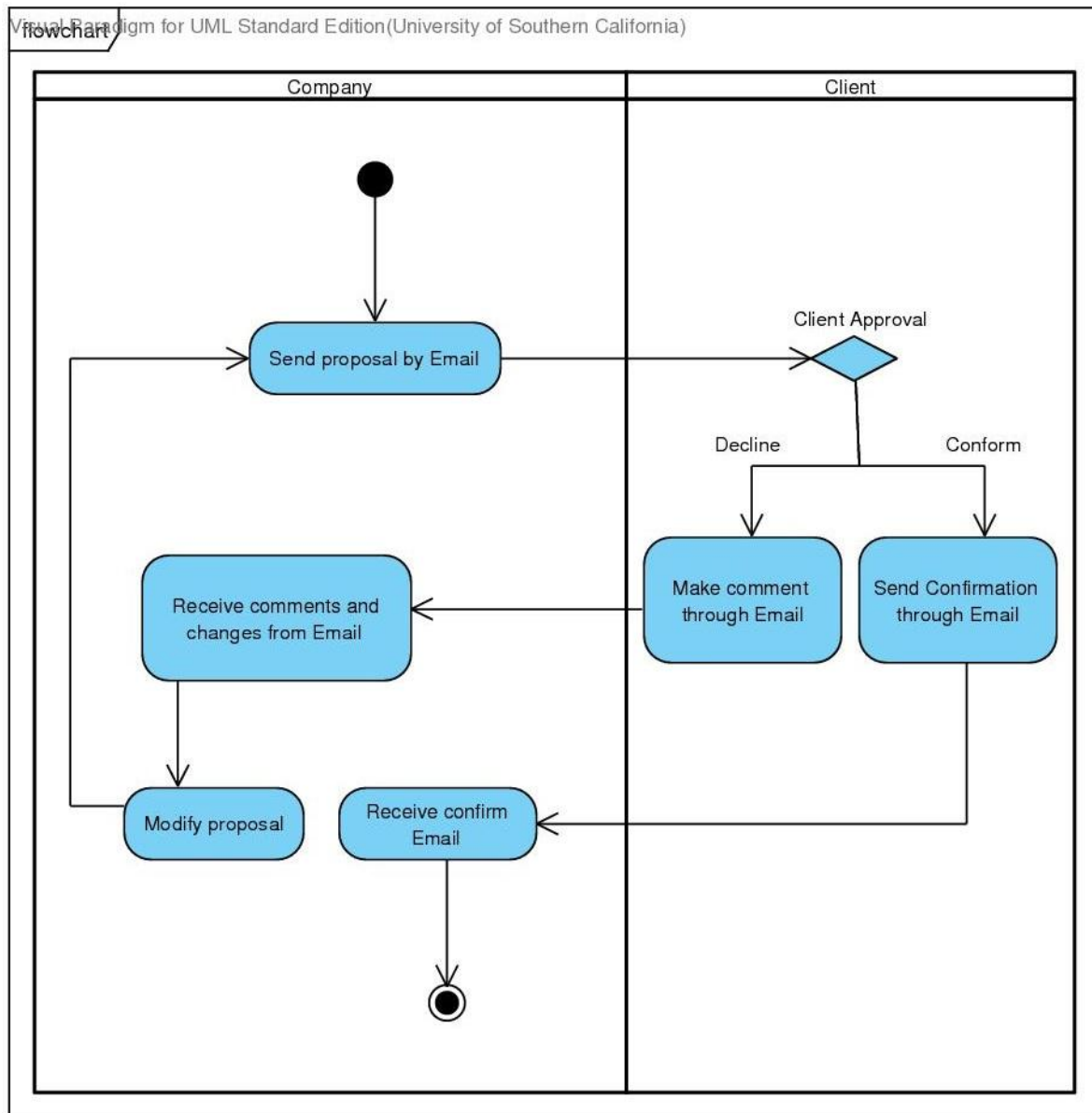
Figure 3: Proposal Approval Workflow

3.2 System Objectives, Constraints and Priorities

3.2.1 Capability Goals

Table 3: Capability Goals

Capability Goals	Priority Level
OC-1 Micro Website Generation: The system is capable of building micro website so customers may see the proposal document and related marketing content from the webpage.	Must Have
OC-2 Related Projects Showcase module: The additional module is capable of posting related proposal content on the micro website.	Must Have
OC-3 Micro Website Administration: The backend system provides the ability to modify the webpage without help from a software developer.	Should Have
OC-4 Content Search Module: The module provides visitors the ability to search the contents on pdf and webpage.	Could Have
OC-5 Email Subscription: The module provides visitors the ability to subscribe to a periodic e-newsletter.	Should Have
OC-6 Encrypted Micro Website URL protection: The module censors the real URL, so only people with links from emails could access the site. Its main purpose is to prevent the proposal from being leaked out too easily.	Must Have

3.2.2 Level of Service Goals

Table 4: Level of Service Goals

Level of Service Goals	Priority Level	Referred WinWin Agreements
Cross Browsers Support: support IE 8 and above, Firefox 4 and above, Chrome 16 and above	Must Have	**LOS-1**

3.2.3 Organizational Goals

OG-1: Decrease the time to create the project via automation micro website buildup.
OG-2: Increase the brand equity of the company via advertising successful showcases.
OG-3: Strengthen competiveness of the company.

3.2.4 Constraints

CO-1 Keeping contract with original web hosting company NewTek: The host of the new system should be utilized in the original web hosting company in order to save money by keeping existing contracts with NewTek.
CO-2 Budget: The maximum budget for the whole system including graphic design and backend frontend is $2000.

3.2.5 Relation to Current System

Table 5: Relation to Current System

Capabilities	Current System	New System
Roles and Responsibilities	· Project manager/assistants performing locally, repetitive procedure.	· Project manager/assistants trained for online operation in the new system.
User Interactions	· Project manager/assistants make proposal related communication by Email.	· Project manager/assistants make proposal related communication through the new system.
Infrastructure	· Batch data processing · Communication and process stored in email.	· Interactive data Processing · Communication and process stored in the new system.
Stakeholder Essentials and Amenities	· Project information is stored in Email and can only be viewed by specific person who has the Email account.	· Project information is electronically stored in database and can be edited/viewed online by project manager.
Future Capabilities	· Client information stored in local paper/ database.	· Integrate client information to micro website database.

3.3 Proposed New Operational Concept
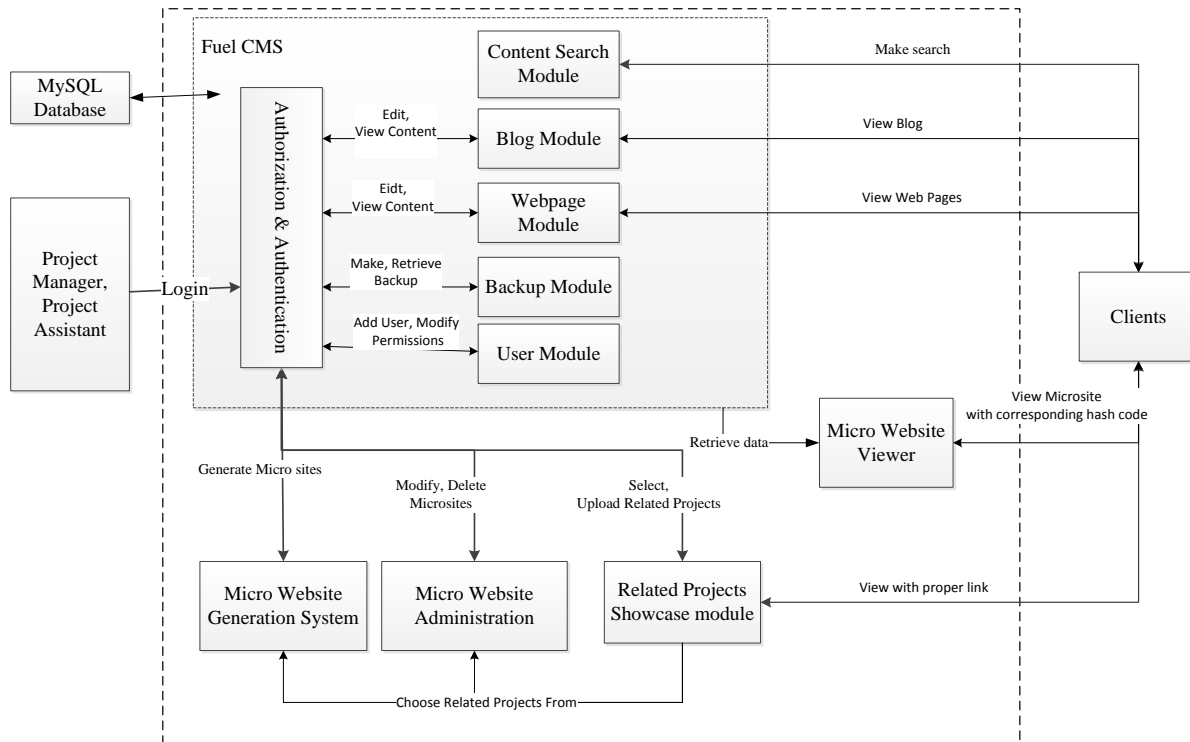
3.3.1 Element Relationship Diagram

Figure 4: Entity Relationship Diagram for UDM system

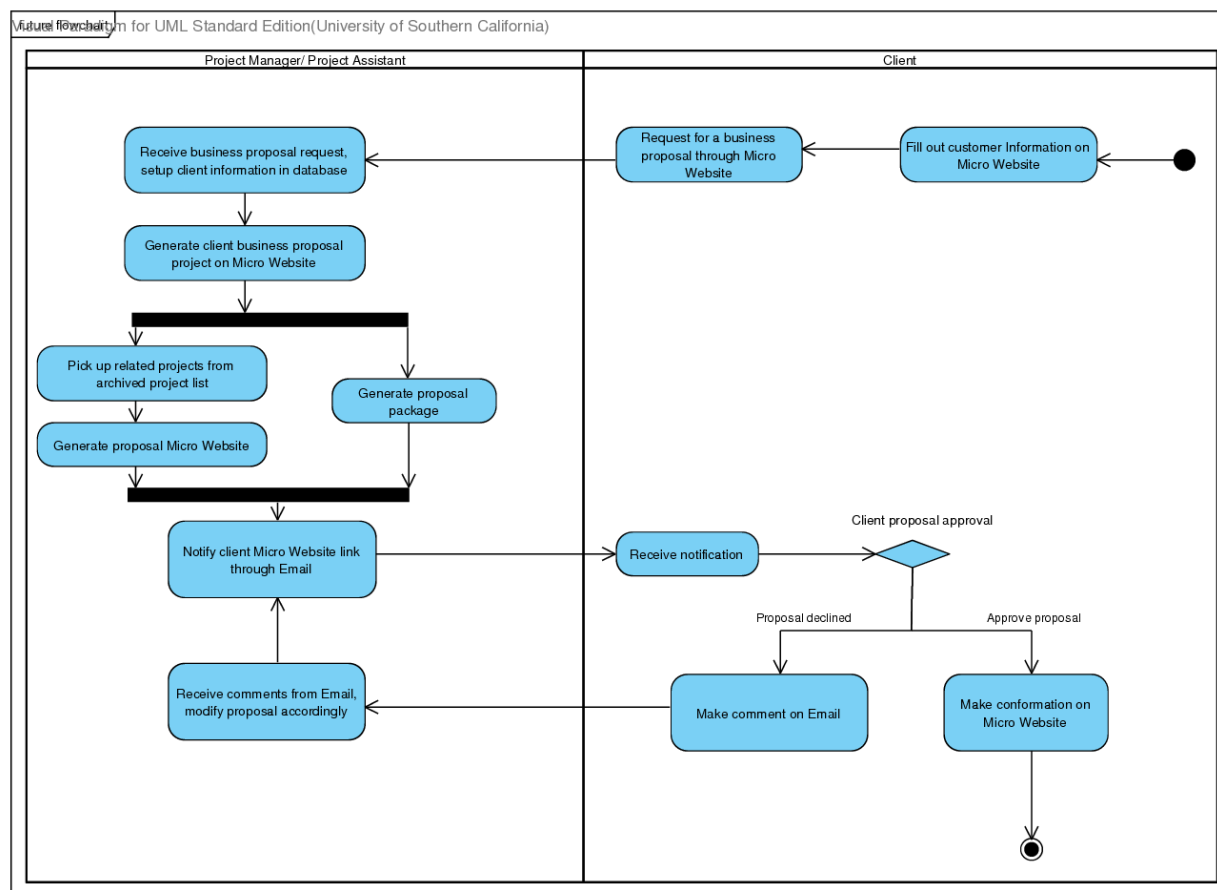## 3.3.2 Business Workflows

Figure 5: New Proposal Approval Workflow

3.4 Organizational and Operational Implications

3.4.1 Organizational Transformations

- The project manager needed to be trained to create project micro website through the new system.
- The project manager and assistants can access the whole proposal project anywhere through a web browser.

3.4.2 Operational Transformations

- Micro website generation of the new system will automate the process of project buildup web pages, and the whole project is demonstrated in the micro website but not demonstrated in one Email as before.
- Hiring more assistants to help and share the work load.