***CEIS390: Week 3 Project Scope Statement***

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| **Project Name** | There’s an App for That! | | **Project Number** | SET\_96055.2 |
| **Project Team # and Name** | Team 1, Shade Leaf Engineering & Consulting | | **Prioritization** | High |
| **Project Executive** | Joshua Kidder | | **Start Date** | OCT 2020 |
| **Scheduled Completion Date** | NOV 2021 |
| Statement of Work—Project Description and **Project Product** | | | Statement of Work  GENERAL DESCRIPTION  As negotiated between Shade Leaf Engineering & Consulting and Green Man's Pantry goals of enterprise, mobile solution, and service-based approaches to information technology: services will include selection of new systems, servers, mainframes, cloud services, processor types and architecture, consolidate and integrate systems, software architecture, database architecture, develop interfaces with other systems/services, expand the existing systems to support other program areas, and to support data and requirements from other servicers, in accordance with applicable guidance by Green Man's Pantry.  Shade Leaf Engineering & Consulting shall perform the development work required by this negotiation on a Labor Hour and Fixed Price basis. The work order shall be performed in accordance with all sections of this work order and client Green Man's Pantry. Shade Leaf Engineering & Consulting must propose labor categories and hourly rates that are contained within Green Man's Pantry negotiation--along with this work order, the labor rates shall not exceed the rates unless Shade Leaf Engineering & Consulting proposes a specialized work category not defined by the work order category description. If a specialized labor category is proposed, Shade Leaf Engineering & Consulting must provide the appropriate justification.  SERVICES AND PRICES/COSTS  Shade Leaf Engineering & Consulting agrees to perform up to the point at which the total amount payable by Green Man's Pantry, including reimbursement in the event of termination of services by Green Man's Pantry, equals the Total Amount allotted by Green Man's Pantry. Green Man's Pantry will be obligated to allocate additional funding in any event specialized labor categories exceed the Total Amount allocated for the work order. As expressed, the Total Amount payable by Green Man's Pantry in the event of termination of applicable negotiations of services includes costs, profit, and estimated termination settlement costs for development services.  Shade Leaf Engineering & Consulting will notify Green Man's Pantry in writing at least sixty days prior to the date when, or of Shade Leaf Engineering & Consulting's best judgement, the work order will approach ninety percent of the Total Amount. The notification will state: (a) the approximate date of Total Amount depletion, (b) an estimate of additional funding, if any, needed to continue development of mobile application platform, and (c) a defined specialized work category of development services performing.  The Total Amount Represents The Maximum Amount Allotted By Green Man's Pantry.   * Shade Leaf Engineering & Consulting Services Applicable To Base Year Only.   All Other Work Order Proposals Shall Price Services Separately From The Total Amount Of The Base Year.  Travel Expenses Will Be Allocated At Actual Cost In Accordance With Scheduled Travel Arrangements.    Shade Leaf Engineering & Consulting may apply indirect costs to travel in accordance with usual accounting practices consistent with Green Man's Pantry.  Green Man's Pantry has allotted funds to this work order in accordance with the following table:   |  |  |  |  |  | | --- | --- | --- | --- | --- | | Deliverable | Obligated Funding Date | Total Estimated Work Order Cost | Obligated Funding Amount | Total Estimated Funding Price | | WBS & Milestones | Nov 6, 2020 | $1,200,000.00 | $1,600,000.00 | $1,600,000.00 | |  |  |  |  |  | | Total |  | **$1,200,000.00** | **$1,600,000.00** | **$1,600,000.00** |   WORK ORDER ACCESS FEE  The Work Order Access Fee is 1/2 of a percent (i.e., 0.0050) that will be applied to the total amount/cost for Shade Leaf Engineering & Consulting services and billed to Green Man's Pantry.    The formula is: Total WOAF = Total Amount \* WOAF Percentage.    On all Work Orders, regardless of Work Order type, Shade Leaf Engineering & Consulting must estimate WOAF in their proposals and Green Man's Pantry may fund WOAF as a separate billing service.    Green Man's Pantry remits the WOAF to Shade Leaf Engineering & Consulting in accordance as defined in this Work Order.  PURPOSE  Green Man's Pantry, and its Stakeholders, have partnered with Shade Leaf Engineering & Consulting, negotiating a work order to render services related to the Operations, Development, Modernization and Enhancement, of Green Man's Pantry procurement platform and other related information technology systems--replacing its outdated Enterprise Resource Planning (ERP) systems, to move into a modernized Electronic Data Interchange (EDI) approach, with use of mobile application technology to handle their business activities such as accounting, procurement, planning and project management, risk management and compliance, sourcing and contract management, and supply chain operations: order management, invoice management, shipping management, audit logs and custom reports.  These systems primarily support finance, human resources, procurement, and distribution departments. This new application platform will streamline the process, speeding up order processing response times, improve invoice and shipment tracking, generate custom reports, sync sourcing opportunities, and manage supplier information, through a single, easy to use interfaced, web portal--with Tablets & Smartphones being the critical platforms, projecting a substantial increase in revenue, while also promoting Shade Leaf Engineering & Consulting presence within the industry.  Shade Leaf Engineering & Consulting’s vision for Green Man's Pantry is to:   * Automate and increase efficiency of Green Man's Pantry procurement platform and administrative processes * Retire manual and/or paper-based processes * Increase use of single-sign-on, with fewer-points of entry * Increase integration among Green Man's Pantry systems * Streamline database design to increase performance and reliability * Centralize data and share resources * Reduce overall data footprint * Increase accuracy and standardization of data * Better use of existing data for improved analysis, reporting and decision-making * Improve system design, interface, usability, and user-friendliness * Improve quality of system releases to minimize need for corrective maintenance * Improve systems with stronger financial controls for accountability * Utilize innovative web technologies for integrated and cost-effective solutions * Reduce overall costs to operate/maintain Green Man's Pantry systems   PROJECT PRODUCT  Shade Leaf Engineering & Consulting’s project, There’s an App for That!, will see the development of a software application for the client, Green Man’s Pantry, to be called Green Man’s Pantry Portal. This application will optimize the business processes of Green Man’s Pantry by primarily integrating mobility, cloud & database technologies, and electronic data interchange solutions for the development, redesign, modernization and enhancement of eBusiness processes managed by Green Man’s Pantry, including Financials, Order processing, Logistics, Manufacturing, Quality, Supply Chain Planning, Procurement, Project management, Budgeting and forecasting, Digital Commerce, Fulfillment, Sourcing, Human Resources and Payroll, Catalogue Management and Custom Reports—allowing new business opportunities in every direction from Marketplaces and Storefronts, to EDI Trading Partners & Networks and Collaborative Replenishment/VMI.  The project will see the production of a mobile application that will be optimized for Tablet & Mobile use--using Direct EDI/Point-to-Point, EDI AS2, EDI FTP/VPN/SFTP/FTPS, Web EDI, Mobile EDI and EDI VAN technologies; along with the development of a web-based application platform, as part of future product design. The application platform will have an appealing graphical user interface on all mediums, from the mobile device to the computer. The application will also be connected to database servers and will utilize cloud technologies to produce faster processing times. These faster processing times are what will produce faster response times and streamlined processes such as invoicing and shipment tracking, and information management such as supplier information. The mobility that comes from having a system that utilizes mobile and tablet features allows for employees to access information from the database quickly and from any location.    Highlight of features and enhancements for the Mobile EDI based application:     * Specialized Log-in - allowing for administrator, security officer, and application service user * Development, redesign, modernization and enhancement of eBusiness processes, including Financials, Order processing, Logistics, Manufacturing, Quality, Supply Chain Planning, Procurement, Project management, Budgeting and forecasting, Sourcing, Human Resources and Payroll, Audit Logs and Custom Reports. * Direct Exchange (DEX) * Web EDI solution - Companies are not required to install any EDI Software or manage a complex EDI environment. Enables small- and medium-sized businesses to create, receive, turn around and manage electronic documents using a browser. * Direct EDI/Point-to-point EDI - you and your trading partners can connect directly via the internet using the same communication method or protocol, through the purchase of a software package that enables the use of all agreed upon protocols such as AS2, SFTP, FTPS. * EDIFact support – you can now create and translate EDIFact files. * XML/CSV/HDT mapping – completely enhanced to include XML to XML and cXML support. Schema support includes .dtd and .xsd file types. * Event Driven scheduler – Jobs and processes can now be executed based the existence of data in a directory, using specialized tools. * EDI FTP/VPN, SFTP, FTPS - Communications with your trading partners can now be imbedded with your regular job stream, with an ease of mind, of security layers, secure internet protocols, and that transfer protocol services provide message management features delivering an ACK, a confirmation to the sender that documents have been successfully received * EDI AS2/AS3/AS4 features - Communications with your trading partners can now be imbedded with your regular job stream. Exchange of AS2/AS3/AS4 set-up information is handled, AS2/AS3/AS4 testing for the client and trading partners is handled, documents are exchanged in real time, unique GLN-Global Location Number identifying your company and trading partners, end-to-end data encryption, ssl encryption and hashing, large file transfer, electronic acknowledgement confirmation MDN-Message Disposition notification, benefits of shared infrastructure, skills and security. * ebMS/ebXML Messaging Service Protocol – specialized enhancement using messaging layer framework, that specifies how messages are send and received over the internet, including security, digital signature, and reliability. * AMQP Advanced Message Queuing Protocol – specialized enhancement using an open standard protocol working at the application layer allowing message orientation, queuing, and routing, while providing reliability and security for sending and receiving messages. * EDI VAN - Communications with your trading partners can be handled through our secure, private network services, where EDI documents can be sent and received between trading partners. In addition to secure communications, EDI VAN delivers: Full mailbox service, Inspection and authentication of all EDI messages, Full audit trail, Message notification, Ancillary services - data backup and recovery, document mapping and compliance, etc. * File Retention Manager and Document Tracking - Now have one location to manage all EDI, EDIFact, Flat File and XML file retention based on Trading Partner and Document type. Once the service requested is triggered tracking the archived physical files are automatically removed from the system. Tracking also includes expanded document key values like PO Number or Invoice Number to easily locate your documents in archives.   CURRENT ENVIRONMENT  The technical environment for the existing information technology systems is defined below:   * Green Man's Pantry currently uses the following desktop business applications: Microsoft Windows 10, Linux, Office 365, and regularly upgrades the environment. * SAP/R3 an enterprise resource planning software designed to coordinate business processes such as order fulfillment, billing, human resource management, and production planning.   All deliverables will be in a format compatible with standards listed.    SCOPE  The milestones and deliverables in the following requirements will be implemented and discussed with Green Man's Pantry Product Owner & Project Executive. This work order will be performed for a one-year period with one base period, and the possibility of extension.    Shade Leaf Engineering & Consulting shall support the following functions:   * Systems Development, Modernization and Enhancement of Information Technology services for Green Man's Pantry systems and subsystems as budgets permit. * Requirements analysis, design, development, testing, and deployment of changes and enhancements to existing/and or new systems in the rendering of new functionality in response to mobile application platform services requested. * Green Man's Pantry may also include development of future systems, consolidation of systems, integration of systems for improved data sharing, and/or the expansion of the existing systems to support other department areas. * Services will include coordination from the client, core team, development team, support resources, and effective project management following the project planning management process and work breakdown schedule. * Information Technology Corrective Maintenance services, including application bug fixes, fixes to reports that are inaccurate, correcting business rules that contain bad logic, and completion of scheduled enterprise architecture and infrastructure, and software upgrades as identified by   THE PROJECT PLANNING AND MANAGEMENT PROCESS  All projects shall be initiated through the work breakdown schedule with a work order request and will follow the project planning and management process.    The project phases defined are included in the Project Plan:   * Planning & Requirements * Project Proposal, Project Charter, Scope Statement, Work Breakdown Schedule, Risk Management Plan, Project Schedule/Budget and Resource Management Plan, Communication Plan, Package Report * System Design * Interface Design, Specialized Login, New Partner Sign-up Module, Administrative Module, Template & Reports Module, Procurement Module, Purchase Order Module, Shipment Tracking Module, Invoice Module, Accounts Receivable Management Module, Sourcing Management Module, Trading Partner Management Module * System Coding * Interface Design, Specialized Login, New Partner Sign-up Module, Administrative Module, Template & Reports Module, Procurement Module, Purchase Order Module, Shipment Tracking Module, Invoice Module, Accounts Receivable Management Module, Sourcing Management Module, Trading Partner Management Module * System Testing * Unit Testing, Integration Testing, System Integration Testing, Functional Testing User Documentation & Training Requirements Definition Document, Solution Architecture Document, Technical Design Document, Interface Control Document, Test Plan, Release Plan, Communication Plan, Data Conversion Plan, Test Report, Operations and Maintenance Document, Project Completion Document * Display/Installation * Incomplete Product Display, Validation Testing Of Product Development To Date, Release To Production * Pilot Testing * Deployment Of Final Product To Limited Group/Subset Of Users, Successful--Data Conversion Plan Continues As Schedule * Initiate Maintenance/New Feature Requests * Post Implementation Review * There's an App for That! Software Development Complete   As part of the concept, requirements, or design phases, and based upon the scope and complexity of work, the project plan may also include either or both of the following services as required by Shade Leaf Engineering & Consulting:   * Business Analysis * Business Process Reengineering   The project planning management process requires monthly reviews, as well as SCRUM reviews as projects progress through the phases. Shade Leaf Engineering & Consulting shall participate in monthly reviews and technical project reviews as requested by Green Man's Pantry.  PROJECT MANAGEMENT  Project Management shall be required for the development of Green Man's Pantry mobile application platform to ensure software developers and other technical staff follow project plans established in the work breakdown schedule for each work order request. Green Man's Pantry, along with Shade Leaf Engineering & Consulting, will closely monitor the cost and schedule of the work order requests to minimize cost and/or schedule variance.  Project Management encourages the client, core team, development team, and support resources, to follow the work breakdown schedule, methodology, procedures, deliverables and best practices that conform to the standards of the Project Management Life Cycle, Software Development Life Cycle and Agile Methodology as set forth by the Project Management Body.    QUALITY ASSURANCE PLAN  Shade Leaf Engineering & Consulting shall provide a Quality Assurance Plan outlining the minimum standards identified by the Quality Assurance resources. Shade Leaf Engineering & Consulting is identified as a team, and shall also identify other team resources, that are dedicated to Quality Assurance ensuring only high-quality products and services are delivered to Green Man's Pantry.  Shade Leaf Engineering & Consulting shall create a Lessons Learned Document, updating each release, and as required throughout the Software Development Life Cycle. Shade Leaf Engineering & Consulting shall publish lessons learned to the team after each release and make recommendations as appropriate to Green Man's Pantry to increase the quality of future deliverables and improve reliability and efficiency of systems.    RISK MANAGEMENT  Shade Leaf Engineering & Consulting emphasizes the importance of identifying, monitoring, managing, and mitigating risks for new product development. Shade Leaf Engineering & Consulting will, with input from Green Man's Pantry, develop a Risk Management Plan for each new product development project. Monthly updates, in the form of a Risk Management Review, will be identified as tasks in the Work Breakdown Schedule. When Shade Leaf Engineering & Consulting determines a technical project risk is on path to be finalized in the future, or already has been finalized, Shade Leaf Engineering & Consulting must notify Green Man's Pantry.   * Change Management: Identifies steps for initiating software changes that may alter the current system or current requirements. Shade Leaf Engineering & Consulting will maintain an Audit Log for each system to log and track all change requests and requests to implement new requirements. * Release Management: Consists of specific processes managing the risks associated with each release. These processes address responsibilities of all functional areas affected by a release. * Problem Tracking: Issues will be thoroughly tracked through Jira and will be submitted to Green Man's Pantry for evaluation and approval of the proposed resolution.   TRACEABILITY REQUIREMENTS LOG  A Traceability Requirements Log shall be created and updated as required as part of the Software Requirements Phase of all new project development projects. The Traceability Requirements Log is a direct input to the Software Requirements Document. The Traceability Requirements Log links new and/or changed requirements to where and how they have been implemented in the system, providing backwards and forward traceability, meaning the log documents each requirement from its source--through the Software Development Life Cycle: planning and requirements, analysis, design, programming, testing, and deployment.    TESTING  Shade Leaf Engineering & Consulting will conduct functional, unit, system/integration, regression, smoke, load/performance, and stability testing as needed, as outlined in the quality assurance plan for each system release. Each test will be identified as a milestone in the Work Breakdown Schedule. Use of industry-standard automated testing software may be used during the testing process. In the event that automated testing software is used, the software must be flexible to handle changes and requirements of any complexity, along with the ability to maintain ongoing test data, ensure the requirements are met, and that regression testing will fully test all previous functionality.    USER ACCEPTANCE TESTING  Green Man's Pantry will perform acceptance testing of the new product development platform systems' code, database changes/additions after each successful completion of testing by Shade Leaf Engineering & Consulting. Shade Leaf Engineering & Consulting shall prepare and update User Acceptance Test plans for users to follow during the initial testing phase, then users are encouraged to conduct their own AD HOC testing. Shade Leaf Engineering & Consulting will assist Green Man's Pantry with the preparation and execution of the acceptance test by establishing test data and maintaining the test environment. Shade Leaf Engineering & Consulting will provide draft versions of all documentation, including the Traceability Requirements Log, which will be delivered with the final product at the time of user acceptance testing. The Traceability Requirements Log will link all new and/or changed requirements to where and how they have been implemented in the system, providing backwards and forward traceability, to assist users during testing. Shade Leaf Engineering & Consulting will correct any errors uncovered by the User Acceptance Test team and document the results in a Test Report.  Green Man's Pantry will examine the test results and make a determination as to the functionality of the new systems' code, and database changes/additions to be released into production environment. This planned release will be certified under one of the following:   * Error free and should be released into production * Errors still exist that should be addressed, however, a decision could be made that * the release can proceed, and the errors can be corrected through a later release * the release can proceed but defective components will be removed, and errors will be corrected in a later release. * There are critical system issues and should not be released into production. Should be returned for further development and retesting.   PRODUCTION RELEASE  After Green Man's Pantry has performed User Acceptance Testing and final performance load and stress testing are completed, the product will be submitted as an Application System Production Release, following a work order request, and associated documentation required for production release. This will include the preparation of the system release, as well as the release of ISA Test IDs, ISA Production IDs, Login IDs, and Passwords, and necessary software code. Shade Leaf Engineering & Consulting will prepare and manage Release Documentation to document the fixes/changes/enhancements included in each system release and support the release process using quality assurance best practices.  Shade Leaf Engineering & Consulting will determine if the release is categorized as a "low", "medium", "high" or "emergency" release. Green Man's Pantry current guideline identifies 30 business days (or more) for "low" releases, 30 business days for "medium" releases, 14 business days for "high" releases, and 3 business days for "emergency" releases. Shade Leaf Engineering & Consulting will coordinate release testing, including copying all relevant files into the test environment used to simulate each release. Shade Leaf Engineering & Consulting will maintain the test environments infrastructure during the installation and configuration of software upgrades and application system releases as required. Shade Leaf Engineering & Consulting will follow-up to provide verification and validation of the intended results after the release into production has been completed, to verify the port to production was completed correctly.    CONCEPT OF SOFTWARE ARCHITECTURE  The Concept of Software Architecture will be based upon the templates and checklists outline in the Agile Methodology. This document is referred to as ConArch. This document is not necessary for routine work on existing systems. The ConArch will be required, though, for deployment of new systems, major re-engineering or modernization of existing systems, or development of new system modules to meet new business requirements. Shade Leaf Engineering & Consulting will develop a ConArch or update an existing ConArch for the Requirements and Design phases. The ConArch will be delivered first, before the Software Requirements Document, and then refined before the Technical Design document.    BUSINESS PROCESS MODELS  Business process models may include any of the following:   * Pseudo Code * Flow Charts * Use Cases & Diagrams * Use Case Specifications * UML Charts * Class Charts * Sequence Diagrams * State Machine Diagrams * Risk Assessment * Work Process Simulations * Project Management Life Cycle Diagrams * Software Development Life Cycle Diagrams * Agile Methodology Diagrams   DISPLAY  Green Man's Pantry, and its Stakeholders can initiate a call for Display, to Shade Leaf Engineering & Consulting. The Display is an incomplete product prototype that is tested to validate the functionality of the developed product to date. The Display is considered to be completely demonstrating unit functions, upon validating system functionality. If Green Man's Pantry initiates a request calling for a Display, the Display shall be deployed using the development language of the final product delivery, as well as the database of the final product delivery. The Display will be tested to verify the efficiency of the code as well as the performance of the database. The Traceability Requirements Log will also be included with a call Display, the Traceability Requirements Log will include verification tasks for each requirement for testing purposes.    PILOT  Shade Leaf Engineering & Consulting will conduct and initiate Pilot testing. During Pilot testing, deployment of the final product will be released to a limited group or subset of users. The Pilot test is intended to reduce overall risk of the project, placing a limited number of users at risk of product failure in the Deployment phase, If the Pilot successfully passes testing, then the Final Production Release and Data Conversion will continue as scheduled. Shade Leaf Engineering & Consulting will develop data recovery plans prior to pilot testing in the event that the pilot is not successful, outlining corrective action plans.    OPERATIONAL MAINTENANCE  Shade Leaf Engineering & Consulting will be supporting the ongoing operational maintenance, performing modifications that correct application problems caused by design, logic, or coding errors. This type of maintenance will be initiated through a service desk ticket and often involves errors that must be addressed immediately. Examples of these types of issues include the following:     * Invoice calculations that generate incorrect promotions, allowances, line-item totals and total amounts * Data fields that omit a required field * Data fields that store entries in improper database locations * Improper logic in business rules, or specifications * Error messages * Interfaces not functioning as intended * Application configuration issues * Reports not displaying information correctly   COMPLIANCE  All information technology database and platform systems developed through this work order will comply with Federal and State regulations, of information technology and vegan food handling/distribution practices, unless an exception to this requirement exists. Any exceptions to this work order will be listed here.  Applicable Standards, which apply to this negotiation   * Federal Food, Drug, & Cosmetic Act (FDCA) states the labeling of plant-based foods restricts the use of the term meat, or meat-based names in the product name. * BeVeg Certified. Green Man's Pantry will provide certification documentation as part of the Project Scope. Green Man's Pantry will also provide official BeVeg logos/graphics to be promoted on the mobile application portal. Informational at beveg.com * Vegan Certified. Green Man's Pantry will provide certification documentation as part of the Project Scope. Green Man's Pantry will also provide official Vegan logos/graphics to be promoted on the mobile application portal. Informational at vegan.org * Vegan Society Trademark Certified. Green Man's Pantry will provide certification documentation as part of the Project Scope. Green Man's Pantry will also provide official Vegan Society Trademark logos/graphics to be promoted on the mobile application portal. Informational at vegansociety.com * Organic Certified. Green Man's Pantry will provide certification documentation as part of the Project Scope. Green Man's Pantry will also provide official Organic logos/graphics to be promoted on the mobile application portal. Informational at usda.gov * Certified Ayurvedic Chefs/Culinary Artists. Green Man's Pantry will provide certification documentation as part of the Project Scope. Ayurvedic Chefs/Culinary Artists will need to be promoted, along with regulations and laws based upon vegan practices/standards. Green Man's Pantry will also provide official logos/graphics associated with the practice of Certified Ayurvedic Food Handling. * EDI transactions within the United States must conform to X12 EDI standards and require compliant, quality software for translation. These standards allow companies to communicate and transfer documents from business-to-business without incompatible software or unsecure connections that leave proprietary data vulnerable to outsiders. EDI Development Licenses are required to be purchased to keep the project within EDI Standards. This includes Site Licenses, Developer Licenses, Desktop Licenses, and AS2 Support Packages.   SCOPE OF INSPECTION  Green Man's Pantry can inspect deliverables for content, completeness, accuracy, and conformance to work order requirements of the Project Management Life Cycle. Inspection includes validation of information and software through the use of automated tools and testing of deliverables. The scope and nature of this testing must be requested to Shade Leaf Engineering & Consulting to ensure the completeness, quality, and performance of all deliverables.  PERIOD OF PERFORMANCE  This work order will be performed for a one-year period with one base period, and the possibility of extension.  WORK ORDER SCHEDULE AND MILESTONE DATES   |  |  | | --- | --- | | **Deliverable** | **Due Date** | | **Project Proposal Approval** | Nov 1, 2020 | | **Project Charter & Scope Statement Approval** | Nov 15, 2020 | | **Work Breakdown Schedule** | Nov 22, 2020 | | **Risk Management Plan** | Nov 29, 2020 | | **Project Schedule & Budget** | Dec 6, 2020 | | **Communication Plan** | Dec 13, 2020 | | **Project Package Report** | Dec 19, 2020 | | **Analysis & Planning** | Jan 8, 2021 | | **System Design** | Mar 31, 2021 | | **Interface Design** | Mar 31, 2021 | | **Specialized Login Design** | Jan 15, 2021 | | **New Partner Sign-up Module Design** | Jan 22, 2021 | | **Admin Module Design** | Jan 29, 2021 | | **Template & Reports Module Design** | Mar 31, 2021 | | **Procurement Module Design** | Feb 5, 2021 | | Procurement Notices (836) Module Design | Feb 5, 2021 | | **Purchasing Module Design** | Feb 19, 2021 | | Product Registration (140) Module Design | Feb 12, 2021 | | Purchase Order (850) Module Design | Feb 12, 2021 |  |  |  | | --- | --- | | Purchase Order (875) Module Design | Feb 12, 2021 | | Purchase Order Acknowledgment (855) Module Design | Feb 19, 2021 | | Price Information (879) Module Design | Feb 19, 2021 | | **Shipment Tracking Module Design** | Mar 5, 2021 | | Transportation Appointment Schedule Information   (163) Module Design | Feb 26, 2021 | | Motor Carrier Load Tender (204) Module Design | Feb 26, 2021 | | Motor Carrier Bill of Lading (211) Module Design | Feb 26, 2021 | | Motor Carrier Deliver Shipment Status Inquiry (213)   Module Design | Feb 26, 2021 | | Motor Carrier Pickup Manifest (215) Module Design | Mar 5, 2021 | | Advanced Ship Notice (856) Module Design | Mar 5, 2021 | | Routing and Carrier Instructions (853) Module Design | Mar 5, 2021 | | **Invoicing Module Design** | Mar 19, 2021 | | Motor Carrier Freight Details & Invoice (210) Module Design | Mar 12, 2021 | | Consolidators Freight Bill and Invoice (223) Module Design | Mar 12, 2021 | | Invoice (810) Module Design | Mar 12, 2021 | | Invoice (880) Module Design | Mar 19, 2021 | | Freight Invoice (859) Module Design | Mar 19, 2021 | | **Accounts Receivable Management Module Design** | Mar 31, 2021 | | **Sourcing Management Module Design** | Mar 31, 2021 | | **Trading Partner Management Module Design** | Mar 31, 2021 | | **System Coding** | June 30, 2021 | | **System Testing** | Jul 30, 2021 | | **User Documentation & Training** | Aug 27, 2021 | | **Display/Installation** | Sept 15, 2021 | | **Pilot Testing** | Sept 30, 2021 | | **Initiate Maintenance & New Feature Requests** | Nov 1, 2021 | | **Post Implementation Review Complete** | Nov 15, 2021 | | **There’s an App for That! Software Development Complete** | Nov 30, 2021 | |  |  |   INVOICE SUBMISSION  Shade Leaf Engineering & Consulting will provide invoice data, including labor charges, rates, and quantities of labor hours. Shade Leaf Engineering & Consulting will submit invoices as follows:  Shade Leaf Engineering & Consulting will utilize Green Man's Pantry electronic system to submit invoices.  Invoices will be sent to:   * www.greenmanpantry.com/billing   INVOICE REQUIREMENTS  Shade Leaf Engineering & Consulting will submit Requests for Payments with the format outlined in INVOICE REQUIREMENTS and considered proper payment procedure. The data elements indicated below will be included on each invoice:   * Work Order Number: * Invoice Number: * Project Number: * Project Title: * Accounting Control Transaction Number: * Period of Performance: * Client Name and Address:   Shade Leaf Engineering & Consulting will provide invoice data, including labor charges, rates, and quantities of labor hours.  INVOICING INSTRUCTIONS  Shade Leaf Engineering & Consulting will provide a proper invoice for each work order, to be submitted no later than seven working days after approval by Green Man's Pantry of the product, service, or critical occurrence. A separate invoice for each work order will be submitted on official company letterhead, as a MEMO, with detailed costs for each of the following:   * For fixed priced services, products delivered * For time priced services, labor adjusted for each skill level * Total labor charges * Travel and per diem charges * Total invoice amount * Prompt discount offered   For time priced services, the amount invoiced will include labor charges for actual hours worked and other expenses based upon the work order rates and conditions, not to exceed the limits of the work order. | | | |
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| **Project Deliverables** | Green Man's Pantry has partnered with Shade Leaf Engineering & Consulting, in There's An App for That!, to develop a enterprise, mobile solutions, and service-based approach to information technology, with the use of electronic data interchange solutions, with the redesign, modernization and enhancement of eBusiness processes, including Financials, Order processing, Logistics, Manufacturing, Quality, Supply Chain Planning, Procurement, Project management, Budgeting and forecasting, Digital Commerce, Fulfillment, Sourcing, Human Resources and Payroll, Catalogue Management and Custom Reports--allowing new business opportunities in every direction from Marketplaces and Storefronts, to EDI Trading Partners & Networks and Collaborative Replenishment/VMI.    * **Green Man's Pantry engages** in weekly/monthly meetings with Shade Leaf Engineering & Consulting to consult in the development/ design of a mobile solution for * **Planning & Analysis gathering** of the current state of Green Man's Pantry daily routines, identifying and implementing critical improvements to be implemented into the application, outlining the project proposal, project charter, scope statement, work breakdown schedule, risk management plan, project schedule/budget, resource management plan, communication plan, and final package report * **Requirements gathering** of trading partner migration and setup requirements, gathering hardware, software, and software licensing requirements, gathering edi installation and mapping requirements, gathering business partner requirements, gathering software development requirements, articulating how the mobile solution will be used in eBusiness processes in alignment with the Product Owner & Stakeholders goals and objectives, and implementing an online presence on mobile devices for Green Man's Pantry * **Framework account signups**—transferable to Green Man's Pantry, Install and configure associated platforms, Select the arch-types: iOS, Android and Web applications services as the arch-types the platform will interact with * **System Design including** interface design, specialized login, new partner signup module, administrative module, templates and report modules, procurement module, order purchasing module, shipment track module, invoice module, accounts receivable management module, sourcing management module, and trading partner management module--with design documents for the mobile solution application * **System Coding including** interface design, specialized login, new partner signup module, administrative module, templates and report modules, procurement module, order purchasing module, shipment track module, invoice module, accounts receivable management module, sourcing management module, and trading partner management module—with design documents for the mobile solution application, establishing a fluid mobile solution web-application architecture, encouraging positive user interactions * **System Testing including** unit testing, integration testing, system integration testing, smoke testing, functional testing, and user acceptance testing of system features and functionality, including front-end back-end testing, and ethical hacking practices—while also policy and standards creating User Documentation & Training Requirements Definition Document, Solution Architecture Document, Technical Design Document, Interface Control Document, Test Plan, Release Plan, Communication Plan, Data Conversion Plan, Test Report, Operations and Maintenance Document, Project Completion Document, and Lessons Learned, documentation documents * **Trading partner establishment** of all interconnects between Green Man's Pantry and their list of trading partners through all Mobile EDI, Direct Exchange, Direct EDI, EDIFact, XML/CSV/HDT, FTP-VPN/SFTP/FTPS, AS2/AS3/AS4, Web EDI, and EDI VAN connections * **Display/Installation upon** request for call of Display, deployment using the development language of the final product, and the database of the final product, will be executed as an incomplete product prototype that is tested to validate the functionality of the developed product to date—upon successful completion of validation testing, the release to production will be scheduled, including full release of developed product, completing and finalizing all trading partner establishments * **Pilot Testing deployment** of the final product to a limited group or subset of users, to reduce the overall risk of the project, placing a limited number of users at risk of product failure in the Deployment phase. Upon successfully passing pilot testing, the final production release and data conversion will continue as scheduled. Data recover plans will be created prior to pilot testing in the event pilot testing is not successful * **Maintenance/New Feature Requests** will kick-off operational maintenance and Shade Leaf Engineering & Consulting will begin working on modifications and/or bug fixes caused by design, logic, or coding errors. These are completed out of the current pool of known issues, or through service desk tickets submitted by the client and their trading partners--at this time the new feature requests will be opened, and the development of the web-based application platform will be initiated, using Web EDI solutions. * **Post Implementation Review** * **There's An App for That! Software Development Complete** | |
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| **Project Objectives** | The objective of this project is to develop a comprehensive application solution for Green Man’s Pantry which helps unify their logistical and data heuristics into a singular function. It is the goal to complete this ambitious project to launch in time for the fall and winter holiday season in 2021. This unifying platform is expected to cut operational costs by 20% and a budget of $1.6 million. We are also expected to complete the following objectives:   * Create a singular platform to reduce user error * Install a backend backbone help ensure data remains secure * Project is estimated of having an operational lifespan of 15 years | |
| **Project Assumptions** | The following project assumptions are to be considered for the project There’s an App for That! and its associated application, Green Man Pantry’s Portal:   * The company will have sufficient funding at launch * The company will have necessary resources when needed. * Individuals will have access to resources without delay so that tasks may be completed on time. * Costs will not change during the project cycle. * Equipment will not break during the project cycle. * There will be enough customers who want the product. * Laws and regulations will remain the same through the project cycle and will not cause the scope to change * Veganism is trending and at an all-time high, safe to assume the business will have a plethora of customers * Assume the location of the company will have enough customers to support Vegan based products. * We will have sufficient stakeholders * All team members will have the required skills and not require additional outside training. * Scope will not change after stakeholders agree on the scope statement. * Vendors will not go out of business during project life span. * No major catastrophic event will befall the company, IE Earthquake, Tornado, Hurricane, Fire, etc. * We won’t have a high-end competitor push our company out. | |
| **Project Constraints** | The mobile application platform program is expected to expedite processes and provide synergies just in time for the holiday season and must be functioning and online by NOV 2021. The platform will move through several phases of development: analysis, design, code, test, display and maintain. Design and development of the mobile application platforms user interface, credentials, template module design, purchasing module design, shipment tracking design, invoicing module design, accounts receivable management design, sourcing management design, trading partner and personnel management module design, reports management module design, and all partnerships must be established through valid ISA & GS IDs between the client, before formal approval of user documentation and training initiatives. High-level constraints are listed below:   * Project Timeline – In time for the next holiday season, i.e., NOV 2021 * Project Budget * Labeling Laws – Many states have passed laws regarding the labeling of plant-based foods. These include Alabama, Arkansas, Kentucky, Louisiana, Mississippi, Montana, North Dakota, Oklahoma, South Carolina, South Dakota, and Wyoming have all passed labeling laws restricting the use of the term meat. In many cases, violations could lead to criminal prosecution. User interfaces would need to restrict the use of meat-based names in the product name and keeping this current and up to date is critical under the Federal Food, Drug, & Cosmetic Act (FDCA). * Certified BeVeg - The client, Green Man's Pantry, is vegan certified. The client will need to produce up-to-date certification documents and submit them as part of the project. Certified BeVeg will need to be promoted, as well as implementing validation restrictions into the client's mobile application program as needed regarding regulations and laws, while also only using approved graphics by BeVeg. Informational at beveg.com * Certified Vegan - The client, Green Man's Pantry, is vegan certified. The client will need to produce up-to-date certification documents and submit them as part of the project. Certified Vegan will need to be promoted, as well as implementing validation restrictions into the client's mobile application program as needed regarding regulations and laws, while also only using approved graphics by Vegan Action. Information on vegan certification be found on Vegan.org and does have costs as shown below:  |  |  |  | | --- | --- | --- | | * Fee Band | * Annual Revenue | * Annual Fee | | * A | * Up to $15000 | * $150 | | * B | * Up to $100,000 | * $250 | | * C | * Up to $250,000 | * $400 | | * D | * Up to $500,000 | * $600 | | * E | * Up to $999,000 | * $1000 | | * F | * Over $1 Million | * $2000 | | * G | * Up to $10 Million | * $3000 |  * Certified Vegan Society Trademark - The client, Green Man's Pantry, is vegan society trademark certified. The client will need to produce up-to-date certification documents and submit them as part of the project. Certified Vegan Society Trademark will need to be promoted, as well as implementing validation restrictions into the client's mobile application program as needed regarding regulations and laws, while also only using approved graphics by Vegan Society Trademark. Informational at vegansociety.com * Certified Organic - The client, Green Man's Pantry, is organic certified. The client will need to produce up-to-date certification documents and submit them as part of the project. Certified Organic awareness will need to be promoted, as well as implementing validation restrictions into the client's mobile application program as needed regarding regulations and laws, while also only using approved graphics by USDA. Informational at usda.gov * Certified Ayurvedic Chefs/Culinary Artists - The client, Green Man's Pantry, has incorporated certified ayurvedic chefs/culinary artists into its production processes, to use the healing power of food to bring health and wholeness to everybody. The client will need to produce up-to-date certification documents and submit them as part of the project. Certified Ayurvedic Chefs/Culinary Artists will need to be promoted, along with regulations and laws, while also only using approved graphics associated with the practice of Certified Ayurvedic Food Handling. * Quality Control   + Screen size, sensors and interactions - Mobile devices have small screen sizes, though tablets are moving to more laptop size screens. There are limited canvas spaces with some mobile devices, meaning the use of typing could be viewed as an inconvenience, with limited space and touch interactions of different elements. Other formatting variations to display content will need to be considered and planned for.   + Network issues - The mobile product will have to contend with network latencies and failure points. To contend with these types of issues and increase a positive user experience will need to avoid blocking spinners and ensure the platform and design permits loading partial elements and cached data to keep the user occupied while waiting. The design platform will also need to optimize for walking in and out of Wi-Fi zones as this affects not just the software on the phone, but also the backend that supports the application.   + Application updates - Making updates are incredibly hard for mobile applications, even the tiniest of changes. It's known that shipping even the smallest change takes on average of seven days to be approved by Apple. Also, the data sits client side, meaning users must go in and download the updates manually. If changes don’t perform as expected (driving wrong user behaviors, introducing bugs, etc.), fixing the issue immediately can be extremely difficult, in addition to waiting for additional review processes and slow user adoption. * Customer Satisfaction * Slow deliveries of product could impact timelines * Prices on resources could shift due to a volatile market * EDI transactions with the United States must conform to X12 EDI standards and require compliant, quality software for translation. These standards allow companies to communicate and transfer documents from business-to-business without incompatible software or unsecure connections that leave proprietary data vulnerable to outsiders. The five functional transaction sets and subsets include: communications & control, finance, transportation, supply chain and insurance--with subsets defined as HIPAA - Health Insurance Portability and Accountability Act, UCS - Uniform Communication Standard, VICS - Voluntary Interindustry Commerce Standards, AIAG - Automotive Industry Action Group, CIDX - Chemical Industry Data Exchange, EIDX - Electronics Industry Data Exchange Group (CompTIA) and PIDX - American Petroleum Institute. The client, Green Man's Pantry, at this time is assumed to fall under the grocery industry subset UCS - Uniform Communication Standard, however further analysis will need to be completed. * Location matters. Certain places such as Israel have a vegan population of 5% which makes it very friendly to vegan based companies. Other places such as Australia have only 1% of their population interested. | |
| **Exclusions** | The following exclusions are to be considered for the project There’s an App for That! and its associated application, Green Man Pantry’s Portal:   * It is assumed the network infrastructure already exists to accommodate the load during peak hours of implementation. * iOS and android support will not be greater than two iterative generations behind the current release. Furthermore, only Apple and Samsung devices will be supported in this application. * The customer is responsible for all Internet surcharges in relation to data caps that may be incurred through their preferred carrier. The customer assumes all the risk in this. * The data and its protection remain the sole responsibility of the client. It is their responsibility to ensure the 3-2-1 rule is always maintained. * We are not liable for any security breaches due to poor network protections on the client’s network. It is the assumption of this company proper protections protocols are already enacted. * Damage incurred by the client will be at their expense. The customer may ensure the equipment at their own expense if they desire. All damages must be paid within full. * IoT carries an inherent risk within protocol firmware. We will not update the security of the devices beyond the natural lifetime of the project. Updates beyond the lifecycle may be included with an extended contract on a per basis assessment. * We are not liable for any downturn in economic indicators. * It is the customer’s responsibility to ensure they comply with all state, federal, and international laws governing compliance in relation to data retention. * We will not support third party devices beyond the scope of this project. | |
| **Acceptance Criteria** | Green Man's Pantry has partnered with Shade Leaf Engineering & Consulting to develop a customized mobile web presence for its distribution company and trading partners. This project will be monitored and measured not only through web meetings, conference calls, and onsite meetings, but also through a waterfall/agile approach consisting of the following phases: analysis, design, code, test, display, and maintain--where not only the core team, development team, and project managers, but also the stakeholders will submit any work done towards the project through an agile framework called SPRINTS. This project will be successful when the following conditions are met:   * Analysis and Planning is completed with all personal, including stakeholders, project executive, business and product owner, subject matter experts, development team, and external consultants, to create the project plan and software requirements needed for the development of the procurement platform web portal--with requirements being fully documented. * System Design is completed, including Specialized Login Module Design, Admin Module Design, New Partner Sign-up Module Design, Template Module Design, Purchasing Module Design, Shipment Tracking Module Design, Billing Module Design, Accounts Receivable Management Module Design, Sourcing Management Module Design, Customer & Personnel Management Module Design and Reports Module Design. * Code Phase is completed, including Login Module Design, Admin Module Design, New Partner Sign-up Module Design, Template Module Design, Purchasing Module Design, Shipment Tracking Module Design, Billing Module Design, Accounts Receivable Management Module Design, Sourcing Management Module Design, Customer & Personnel Management Module Design and Reports Module Design. * System Testing is completed, including Unit Testing, Integration Testing, System Integration Testing, Functional Testing and Go Live Testing, all functionality meets client's business requirements, partners business requirements and ANSI X12 Standards for transaction sets--and all partnerships have been established between the client and its entire list of trading partners. * User can access a functioning mobile application, with account login, logout and password reset features. The web portal page should also contain informational information and the distribution company, its partners, and onboarding instructions. Name of Mobile App Widget: Green Man’s Pantry * Distributor can login to the web portal page, view partners; track partner visits; sync list of potential prospects; schedule and route shipments; track shipments, receipt of shipments, orders, receipt of orders, order delays, invoicing, receipt of invoicing, invoicing delays; manage accounts receivable, post receipt of payments; manage inventory. * Distributor can login to the web portal page, manage company personnel system privileges; verify, create, edit and delete system templates, and announcements; and view and print documents for all processes. * Partner can access the account signup page, entering user information, i.e., username/password/email; company profile information, i.e., company name, address; billing information, i.e., credit card information or invoice billing; and select document types that will be processed to the distributor, i.e., 850, 875, 810, 880, 856, 997, etc. * Partner receives a system response, auto-generated email, that informs them of the account signup being completed and that additional training documents will be received shortly. * Partner can login to the web portal page, manage company personnel system privileges; verify, create, edit and delete system templates, and announcements; begin sending purchase orders, track shipments, receive invoices and view and print documents for all processes. * User documentation and training standards for navigation, accessibility, and compliance, containing policies, business partner requirements, ansi standard requirements and governance regulations are developed, along with side sets of documentation with recommended priorities of future development works. | |
| |  |  | | --- | --- | | **Technical Requirements** | The following is needed to be able to successfully make Green Man’s Pantry’s  Portal functional:   * Smartphones will be required for application testing purposes. The Portal’s main interface will be across mobile devices, therefore when testing, the main interface must be used to make sure development is happening properly. * Tablets will be required for application testing purposes. The Portal’s main interface will be across mobile devices, therefore when testing, the main interface must be used to make sure development is happening properly.      * Desktop and Laptop computers will be required for actual application development. Windows-based computers will offer a wide variety of compatibility with older systems when it comes to implementing the application across the company. Therefore, windows-based hardware would be recommended. Trusted brands include Microsoft, HP, ASUS, and Lenovo. * Server hardware will be required for data storage and application operations. The project will utilize both cloud technology and local server technology as well. Recommended server hardware includes Dell PowerEdge series or Lenovo ThinkServer series. * Internet Modems will be required for data transmission and application operation. This is one of a few required hardware technologies to make internet access available. The modem is what is required to accept the feed from internet carriers and make it usable as internet access for the project. * Powerful Wireless Routers will be required for data transmission and application operation. This is one of a few required hardware technologies to make internet access available. The router is the device that takes the feed from the modem and translates it into WiFi. One main advantage of the portal is be able to wirelessly access resources & databases and update information. Without WiFi this advantage becomes unavailable and therefore is a must to be able to successfully complete the project. * Ethernet cables will be required for data transmission and application operation. This is one of a few required hardware technologies to make internet access available. Ethernet cables have multiple uses and will be required at multiple steps of the project. They will be utilized for connecting WiFI technologies to configure and set up the internet access smoothly. They will also provide developers and project employees an option for hardwiring devices as needed during the development process. Also, they will be essential in connecting and setting up the local servers which will provide database & resource access as needed throughout the development and post-development of the project. * Power Strips and power management hardware, including power backup sources and backup batteries will be required to handle safe power delivery of computer and server technology. This will also be needed as a backup so if power is lost to servers, the backup batteries can keep the server running. * Development programs will be required for basic development of application. The application will need development software such as NetBeans or Sublime Text in order for programmers to build out the code of the application. These programs will require enterprise licenses for use across the project. * Cloud Services will be needed for fast and smooth operation and response of the application. By connecting to a cloud service such as Amazon Web Services, Google Cloud, or Microsoft Azure, there can be quick response time and some application features can be offloaded into the cloud service instead of a local server. This will allow for optimal application operation and efficient use of database & resource storage. * EDI Development Technology Software and Licenses will be required for new operation efficiency. One objective of the project is to switch to an EDI approach for certain business operations. In order to have the application meet those EDI standards, EDI development licenses are required to be purchased to keep the project within EDI standards. This includes Site licenses, Developer Licenses, Desktop Licenses, AS2 Support Packages, and anything else that comes with the EDI Development frameworks. * Cybersecurity Software is needed to protect all data and hardware. There is plenty of room for potential software breaches which need to be covered by thorough and strong security software. Databases will be filled with client information, and the application itself will be used by different people in different areas. There will also be team members working on the project at various points. These are all areas of potential breaches and must be properly covered by top of the line security software for smooth and successful operation of the project. * Database Licenses will be required to operate databases correctly. Though cloud services will also be used, in order to efficiently and properly utilize local servers and databases, respective licenses must be acquired. Licenses could include ones such as an Oracle Database license. * Website Domain will be needed for future project additions. When the website will be implemented, a domain will be required in order to host the site on the preferred domain name. * Printers will be needed for various required printing. As the project progresses, certain documentation may require printing for the project. For that printing, a respective printer will be required. A business-scale laser printer is recommended for quick printing with large volume. * Network Service will be required from a carrier in order to have internet access. This is another piece of Networking that would be required. Modems and Routers will translate the feed, however, there needs to be a feed coming in to begin with to the networking hardware. This service will essentially provide that feed. A partnership with Verizon may allow service to both computer hardware and to mobile devices & tablets. * Billing software may be required to meet certain features of the application. Mobile invoicing and billing may be programmed into the application but integration of an existing software welded together with the application may also be found efficient. In the case of integration, software licenses would be required for any software looking to be integrated. | |  |  | | | | |
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| **APPROVALS** | | |
| Type Name | Signature | Date |
| Project Executive Approval |  |  |
| **Product Owner Approval** |  |  |