Define Scope

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Project: ADPA - Advanced Document Processing & Automation Framework

1. Introduction

The Define Scope process for the ADPA (Advanced Document Processing & Automation) Framework establishes a comprehensive and detailed description of both the project and product scope. This document forms the foundation for all subsequent project planning, execution, and control activities. Given ADPA's positioning as an enterprise-ready, standards-compliant automation platform, scope definition is critical to align diverse

stakeholder expectations, ensure regulatory compliance, and support robust, scalable solution delivery.

2. Process Overview

Key Objectives

- Develop a detailed project scope statement tailored to ADPA's enterprise automation goals.
- Define clear project boundaries, inclusions, and exclusions for all supported standards and integrations.
- Establish acceptance criteria for deliverables, reflecting compliance, security, and performance requirements.
- Create a scope baseline serving as the reference for change control and project validation.

Process Flow

1. **Requirements Analysis:** Elicit, analyze, and consolidate functional/non-functional requirements from enterprise users, regulatory mandates, and industry best practices (BABOK, PMBOK, DMBOK).
2. **Scope Statement Development:** Draft and iterate on the project scope statement, ensuring coverage of all frameworks, integrations, and compliance features.
3. **Stakeholder Validation:** Engage business analysts, project managers, compliance officers, and technical architects for feedback.
4. **Scope Approval and Baseline:** Secure formal approval from project sponsors and key stakeholders, establishing the definitive scope baseline.

3. Inputs and Tools

Primary Inputs

- **Project Charter:** Outlines high-level objectives, justification, and initial boundaries for ADPA.
- **Requirements Documentation:** Includes functional requirements (e.g., standards compliance automation, AI provider support), non-functional requirements (e.g., security, scalability), and integration needs.
- **Stakeholder Register:** Identifies internal and external stakeholders including enterprise IT, compliance, business analysts, and end-users.
- **Enterprise Environmental Factors:** Considers organizational standards, regulatory obligations (GDPR, SOX, PCI DSS, etc.), existing IT infrastructure, and deployment models.

Tools and Techniques

- **Expert Judgment:** Leverage subject matter experts in enterprise automation, AI, security, and standards compliance.
- **Product Analysis:** Decompose ADPA's modular architecture, feature set, and integration points.
- **Alternative Identification:** Evaluate implementation approaches (e.g., REST API vs. CLI, different AI providers, multi-cloud strategies).
- **Facilitated Workshops:** Conduct collaborative sessions with business and technical stakeholders for scope clarification and consensus.

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4. Scope Definition Activities

Requirements Analysis

- **Functional Requirements Review:**
  - Automation for BABOK v3, PMBOK 7th Edition, and DMBOK 2.0 (in progress).

- Multi-provider AI orchestration (OpenAI, Google AI, GitHub Copilot, Ollama).
- Professional document generation with standards-compliant templates.
- Integration with Confluence, SharePoint, Adobe Document Services, and enterprise authentication systems.

- **Non-Functional Requirements Analysis:**
  - Scalability (microservices, horizontal scaling).
  - Security (authentication, authorization, regulatory compliance).
  - Usability (CLI, web admin interface, REST API).
  - Performance (API response times, batch processing).
- **Business Rules Identification:**
  - Document lifecycle governance.
  - Role-based access control and approval workflows.
  - Template versioning and audit trails.
- **Constraint Analysis:**
  - Minimum supported Node.js and TypeScript versions.
  - Adherence to open-source licensing (MIT).
  - Dependency on external APIs and cloud services.

Scope Boundaries

- **Inclusions:**
  - Modular framework for document automation and project analysis.
  - Out-of-the-box support for BABOK v3, PMBOK 7th Edition, DMBOK 2.0 (where available).
  - Multi-provider AI integration and failover.
  - Production-ready REST API and CLI interfaces.
  - Enterprise integrations (Confluence, SharePoint, Adobe).
  - Security and compliance features aligned with regulatory standards.
- **Exclusions:**
  - Custom framework extensions not covered by the core standards.

- Proprietary integrations that are not documented or supported by official APIs.
  - Ongoing maintenance of third-party plugins beyond initial integration.
- **Interface Definitions:**
  - Clear API endpoints and CLI commands for each module.
  - Defined data schemas for templates, documents, and integrations.
- **Dependencies Identification:**
  - Reliance on external AI providers and their availability.
  - Dependency on enterprise infrastructure for deployments (e.g., Active Directory, SharePoint).

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5. Project Scope Statement

Core Components

- **Product Scope Description:**
  ADPA is a modular, standards-compliant automation framework for enterprise requirements, project, and data management, enabling professional documentation generation aligned with BABOK v3, PMBOK 7th Edition, and DMBOK 2.0. It features production-grade REST API and CLI, enterprise security, multi-provider AI integration, and seamless connections to common business platforms.
- **Project Deliverables:**
  - ADPA core framework (CLI, REST API, admin web interface).
  - Pre-built and customizable templates for supported standards.
  - Integration modules for Confluence, SharePoint, Adobe, and identity providers.
  - Documentation, usage guides, and sample workflows.
  - Automated testing suites and CI/CD setup.
  - Compliance and security artifacts.
- **Acceptance Criteria:**
  - All major features implemented and passing functional, security, and integration tests.

- Demonstrated generation of standards-compliant documents.
  - Successful integration and authentication with supported enterprise platforms.
  - Documentation and user guides reviewed and approved.
- **Project Constraints:**
  - Must support Node.js >=18 and TypeScript >=5.7.
  - Deliverable under MIT license.
  - Must comply with identified regulatory standards.
- **Assumptions:**
  - Stakeholders provide timely feedback and access to required systems.
  - Third-party APIs remain stable and accessible.
  - Sufficient resources allocated for testing and documentation.
- **Project Exclusions:**
  - Custom development for unsupported standards or proprietary systems.
  - Legacy system migration or data conversion outside defined integrations.

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6. Deliverables Framework

Primary Deliverables

- **Core Outputs:**
  - ADPA source code and compiled distributions.
  - Standards-compliant document templates and generation engine.
  - API specifications (OpenAPI/TypeSpec).
  - Integration modules and sample configurations.
  - Comprehensive documentation (user, admin, developer).
- **Supporting Documentation:**
  - Installation and configuration guides.
  - Security and compliance documentation.
  - Testing and validation reports.
- **Quality Artifacts:**

- Test coverage reports.
- Code quality and security scan results.
- **Acceptance Deliverables:**
  - Signed-off user acceptance test (UAT) results.
  - Stakeholder approval of documentation and integrations.

Acceptance Criteria

- **Functional Acceptance:**
  - All documented features operate as specified.
  - CLI and API interfaces are fully functional and documented.
- **Quality Standards:**
  - Minimum 90% test coverage.
  - Compliance with coding standards and best practices.
- **Performance Benchmarks:**
  - API response time < 500ms under standard loads.
  - Ability to process and generate large-scale documentation batches.
- **Completion Definitions:**
  - All deliverables deployed, documented, and validated by project sponsors.

7. Validation Process

Review Activities

- **Stakeholder Workshops:**
  - Regular sessions with business analysts, project managers, compliance, and IT.
- **Expert Reviews:**
  - Peer and external reviews of architecture, security, and integration approaches.
- **Requirements Traceability:**
  - Maintain traceability matrix linking requirements to deliverables and test cases.

- **Impact Assessment:**
  - Assess impact of changes or exclusions on downstream deliverables and integrations.

Approval Workflow

1. **Technical Review:**
   - Architecture, code, and integration walkthroughs.
2. **Business Validation:**
   - Confirmation of functional alignment with business goals and standards.
3. **Sponsor Approval:**
   - Formal sign-off by project sponsor and key stakeholders.
4. **Baseline Establishment:**
   - Scope baseline documented and communicated to all stakeholders for ongoing change control.

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8. Practical Guidance for ADPA Scope Management

- **Leverage Standards:**
  Use the included BABOK v3, PMBOK 7th Edition, and DMBOK 2.0 frameworks as scope anchors to minimize ambiguity.
- **Modular Approach:**
  Prioritize modularity in scope definition—each integration and feature should be independently testable and deliverable.
- **Continuous Validation:**
  Integrate frequent reviews and demos throughout development to ensure ongoing alignment with evolving enterprise needs.
- **Change Control:**
  All scope changes must follow the formal change control process to protect project integrity and timeline.
- **Documentation First:**
  Treat all documentation, from API specs to user guides, as core deliverables with acceptance criteria.

This Define Scope Process is the foundation for successful ADPA delivery, ensuring clarity, accountability, and alignment with enterprise automation objectives and industry standards.