Scope Baseline

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Scope Baseline

Project: ADPA – Advanced Document Processing & Automation Framework
Version: 3.2.0
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1. Introduction

The Scope Baseline defines and documents all work and deliverables for the ADPA (Advanced Document Processing & Automation Framework) project. It comprises the approved project scope statement, Work Breakdown Structure (WBS), and WBS dictionary, serving as the authoritative reference for scope management, change control, and performance measurement throughout the project lifecycle.

2. Project Scope Statement

Product Scope

Deliverables:

- Modular, standards-compliant enterprise automation framework for AI-powered document generation, project management, and business/data analysis.
- CLI and REST API interfaces for professional documentation generation following BABOK v3, PMBOK 7th Edition, and DMBOK 2.0 standards.
- Integration modules for enterprise platforms: Atlassian Confluence, Microsoft SharePoint, Adobe Document Services.
- Multi-provider AI orchestration (OpenAI, Google AI, GitHub Copilot, Ollama, Azure OpenAI).
- Admin web interface (Next.js) for configuration, monitoring, and user management.
- Secure, scalable, production-ready Node.js (18+) and TypeScript (5.7+) backend.
- Standards-compliant API specifications (TypeSpec/OpenAPI 3.0/Swagger).
- Enterprise-grade authentication, authorization, and regulatory compliance features.

- Analytics and reporting capabilities for usage, quality, and compliance monitoring.

Key Features & Functionality:

- Automated generation of business analysis, project management, and data management documentation.
- Template-driven document workflows with support for custom branding and layouts.
- End-to-end pipelines with intelligent context and multi-framework integration.
- AI provider failover and real-time provider selection.
- Role-based access control, audit trails, and compliance with Basel III, MiFID II, GDPR, SOX, FINRA, PCI DSS, and more.
- Extensible architecture for integration with additional enterprise systems (Jira, Azure DevOps, FileNet, etc.).

Performance & Quality Characteristics:

- High-availability API and CLI services with horizontal scaling support.
- Response time targets: <1s for standard API calls, <5s for document generation.
- Comprehensive test coverage (unit, integration, performance).
- Adherence to industry standards (PMBOK, BABOK, DMBOK).

Technical Specifications:

- Node.js 18+, TypeScript 5.7+, Express.js, Next.js 14, React 18.
- REST API (OpenAPI 3.0), CLI tools (Yargs), Admin UI (Tailwind CSS).
- JSON-based configuration, extensible to SQL/NoSQL databases.
- Enterprise integrations via OAuth2, SAML, Active Directory.

Project Scope

Work Required:

- Design, development, and validation of the ADPA core platform and modules.
- Implementation of AI provider integrations and intelligent context management.
- Development of standards-compliant documentation templates and generation engines.
- Creation of production-ready REST API with full OpenAPI documentation.
- Build and deployment of CLI and web-based admin interfaces.
- Integration with Confluence, SharePoint, Adobe, and other platforms.
- Implementation of security, compliance, and monitoring capabilities.
- Comprehensive testing, user documentation, and support resources.

Project Management Activities:

- Planning, scheduling, and progress tracking (Agile/Scrum recommended).
- Stakeholder engagement and requirements clarification.
- Scope, schedule, and quality management.
- Risk identification and mitigation.

Supporting Processes:

- Configuration and environment management.
- Change and release management.
- Continuous integration/continuous deployment (CI/CD).
- Regulatory and security compliance tracking.

Documentation Requirements:

- System architecture and component design documentation.
- User, admin, and developer guides.
- API reference and integration manuals.

- Compliance, security, and test reports.

Acceptance Criteria

- **Functional:**
  - All core features (document generation, AI integration, API, CLI, admin UI, enterprise integration) are implemented as per requirements and standards.
  - Successful generation and publishing of documentation to Confluence, SharePoint, and Adobe PDF.
  - AI provider failover and dynamic selection operates as specified.
- **Performance:**
  - Meets defined response time and throughput criteria under typical and peak loads.
- **Quality:**
  - All modules pass automated unit, integration, and performance tests.
  - No critical or high-severity defects at release.
- **Compliance:**
  - Documentation and workflows adhere to BABOK v3, PMBOK 7, and (as available) DMBOK 2.0 guidelines.
  - Meets all stated regulatory compliance requirements.
- **Completion Definition:**
  - All deliverables accepted by stakeholders and validated through user acceptance testing (UAT).
  - Documentation and support materials are delivered and approved.

3. Work Breakdown Structure (WBS)

Level 1: ADPA Enterprise Framework Project

Level 2: Major Deliverables

1. **Core Platform Development**

   - AI Processing Engine
   - Document Generation Engine
   - REST API Server
   - CLI Interface
   - Admin Web Interface

2. **Standards-Based Documentation Modules**

   - BABOK v3 Automation
   - PMBOK 7th Edition Automation
   - DMBOK 2.0 (in-progress)

3. **Enterprise Integrations**

   - Confluence Integration
   - SharePoint Integration
   - Adobe Document Services Integration
   - Version Control Integration (GitHub, GitLab, Azure DevOps)

4. **Security, Compliance & Monitoring**

   - Authentication & Authorization
   - Regulatory Compliance Modules
   - Analytics & Reporting
   - Health & Performance Monitoring

5. **Testing & Quality Assurance**

   - Unit, Integration, and Performance Testing
   - Compliance and Security Audits

6. **Documentation & Support**

   - User, Admin, and Developer Documentation
   - API Reference Guides
   - Support and Training Materials

Level 3: Sub-deliverables

Each major deliverable decomposes into modules, configurations, templates, test suites, and integration points.
For example, "REST API Server" includes: API endpoints, OpenAPI specs, authentication middleware, rate limiting, logging, error handling, etc.

Level 4: Work Packages

- Implement AI provider abstraction layer
- Develop standards-compliant document templates
- Build CLI command modules for document generation
- Create admin UI for workflow and user management
- Integrate with Confluence via OAuth2 and API
- Implement SharePoint upload and metadata features
- Build PDF output module using Adobe APIs
- Develop test suites for each integration
- Prepare compliance documentation for each supported standard

4. WBS Dictionary

Work Package ID	Name/Description	Owner	Resources	Duration	Cost Estimate	Quality Req.	Acceptance Criteria
1.1	AI Processing Engine: multi-provider orchestration	Dev Team	Node, TS, AI APIs	4 wks	$20,000	95% test coverage	Passes all test cases
1.2	Document Generation Engine: standards-based templates	Dev Team	Node, TS, Markdown	4 wks	$15,000	98% template accuracy	UAT with sample docs
1.3	REST API Server: core endpoints, OpenAPI docs	API Lead	Express, TypeSpec	3 wks	$12,000	100% API lint coverage	Swagger UI passes, security tests
1.4	CLI Interface: yargs-based CLI tools	CLI Dev	Yargs, Node	2 wks	$7,000	CLI UX standards	Generates doc from CLI

Work Package ID	Name/Description	Owner	Resources	Duration	Cost Estimate	Quality Req.	Acceptance Criteria
1.5	Admin Web Interface: Next.js portal	UI Lead	Next.js, React	4 wks	$12,000	WCAG 2.1 AA compliance	All admin features demonstrated
2.1	BABOK v3 Automation Module	BA Lead	BA SME, Devs	3 wks	$8,000	BABOK v3 alignment	Compliance checklist pass
2.2	PMBOK 7th Edition Module	PM Lead	PM SME, Devs	3 wks	$8,000	PMBOK 7 compliance	Compliance checklist pass
2.3	DMBOK 2.0 Module (in progress)	DM Lead	DM SME, Devs	5 wks	$10,000	DMBOK 2.0 alignment	Partial delivery demo
3.1	Confluence Integration	DevOps	Atlassian API	2 wks	$5,000	API security/UX	Publish doc via API
3.2	SharePoint Integration	DevOps	MS Graph API	2 wks	$5,000	OAuth2, metadata	Upload doc with metadata
3.3	Adobe Document Services Integration (PDF/Creative Suite)	DevOps	Adobe SDK, APIs	3 wks	$6,000	Brand/style compliance	PDF output matches template
...	... (see project plan for full breakdown)						

Note: The full WBS Dictionary is maintained in project documentation and updated in alignment with change control.

5. Baseline Control

Change Control Process

1. **Change Request Submission:**
   Formal requests logged via project management tool.
2. **Impact Analysis:**
   Assess impact on scope, schedule, cost, quality, compliance.
3. **Approval Workflow:**
   Review by Change Control Board (CCB) or designated leads.
4. **Baseline Update:**
   Approved changes reflected in the Scope Baseline and supporting documentation.

5. **Communication:**
   Stakeholders notified of changes; documentation versioned and distributed.

Performance Measurement

- **Scope Completion %:** Progress tracked by WBS work package completion.
- **Deliverable Acceptance Rates:** Ratio of accepted vs. delivered outputs.
- **Quality Metrics:** Defect density, test coverage, compliance scores.
- **Variance Analysis:** Compare actuals vs. baseline for early issue detection.

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6. Verification and Validation

Verification Procedures

- **Technical Reviews:** All modules undergo peer and lead reviews.
- **Quality Inspections:** Automated and manual QA processes, including code linting, test execution, and security scanning.
- **Compliance Checks:** Cross-referenced against BABOK, PMBOK, DMBOK, and regulatory requirements.
- **Standards Verification:** API and documentation validated against OpenAPI, TypeSpec, and enterprise UX guidelines.

Validation Process

- **Stakeholder Acceptance:** Formal walkthroughs and demonstrations to project sponsors and enterprise stakeholders.
- **User Acceptance Testing (UAT):** End-users validate functional and non-functional requirements.
- **Business Validation:** Output artifacts (documents, reports, templates) reviewed for business value and regulatory compliance.
- **Formal Sign-off:** Acceptance sign-off by stakeholders and leadership.

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7. Baseline Maintenance

Update Procedures

- **Approved Change Integration:** Only approved scope changes incorporated into the baseline.
- **Version Control:** All baseline documents tracked via source control (GitHub) with clear versioning.
- **Documentation Updates:** All changes reflected in system, user, and administrative documentation.
- **Stakeholder Communication:** Release notes and change summaries distributed to all key stakeholders.

Audit and Review

- **Regular Baseline Reviews:** Scheduled scope reviews at phase gates and major milestones.
- **Compliance Audits:** Periodic checks for adherence to standards and regulatory requirements.
- **Performance Assessments:** Evaluation of scope, quality, and schedule performance.
- **Improvement Recommendations:** Lessons learned captured and integrated into future baseline updates.

Unique Project Considerations

- **Standards-First:** Automated, standards-compliant document generation for BABOK, PMBOK, DMBOK.
- **Enterprise Scale:** Designed for large, regulated organizations with stringent compliance and integration needs.
- **Multi-Provider AI:** Intelligent failover, real-time provider selection, and extensibility.

- **Integration-Ready:** Deep hooks for Confluence, SharePoint, Adobe, and version control systems.
- **Security & Compliance:** Enterprise-grade controls and auditability for Fortune 500 and regulated industries.

This Scope Baseline is the controlling document for the ADPA Enterprise Framework project. All project work, changes, and performance assessments shall reference this baseline as the source of truth.