

Functional Specification Documents

UGL: EIMS - Updated Features and UI

Prepared for: UGL EIMS Project Team

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Introduction

This Document

We have attempted to write the contents of this document using lay terms and in a friendly way to make it easier to read - and as a result make sure it actually gets read and is understood by all parties concerned. There are however serious components of this document that relating to scope: the scope of work identified by Digital Garden for the project as a whole, and the scope of work that Digital Garden will undertake.

When dealing with scope we will refer to the RFC 2119 standard:

The key words "MUST", "MUST NOT", "REQUIRED", "SHALL", "SHALL NOT", "SHOULD", "SHOULD NOT", "RECOMMENDED", "MAY", and "OPTIONAL" in this document are to be interpreted as described in RFC 2119.

With English being the dynamic language that it is, this document may use the words WILL and WILL NOT in place of MUST and MUST NOT.

This is also what we refer to as a “living document” and may change at any time. Like most projects it is expected that eventually this document will serve its purpose and will not be updated any more to reflect changes in scope.

This means that the document is a set of guidelines and any official scope or budget considerations should be made independent of this document.

Summary

UGL has had the EIMS for cataloguing company policies, procedures, tools, knowledge and other documentation related to UGL projects. The system is hard to use and difficult to navigate. The end result is that people are finding ways around the system, often involving the use of out-dated procedures or making up custom procedures ad-hoc.

Digital Garden are here to streamline the user interface and design of several new features. As the EIMS is built in SharePoint a number of design considerations will need to be taken into account and will be discussed throughout this document.

Definitions

Because this project has been around for a while and there is an existing system in place a lot of terminology gets thrown around. Add to that a whole suite of new functionality that doesn't have any specific terms attached to it. This can lead to some confusion.

To simplify things this document uses the following definitions. This is absolutely not a recommendation for how different parts of the system ought to be named. Because this list is not prescriptive it should only be changed if it causes confusion for the readers.

PTK Content - When talking about PTK this is referring specifically to Procedures, Tools and Knowledge that sit on the EIMS and apply to all of UGL. Tools & Knowledge are linked specifically to procedures and as a result are surfaced differently. All of the procedures are linked to management areas. Additionally, the following items are considered part of the PTK content:

- Policies & Guidelines which are linked to a management area but not to procedure
- People who are linked to a management area but not necessarily a procedure. These include the corporate sponsor, business sponsor, the sector sponsors and subject matter experts

EIMS Functionality - The EIMS functionality encompasses the following:

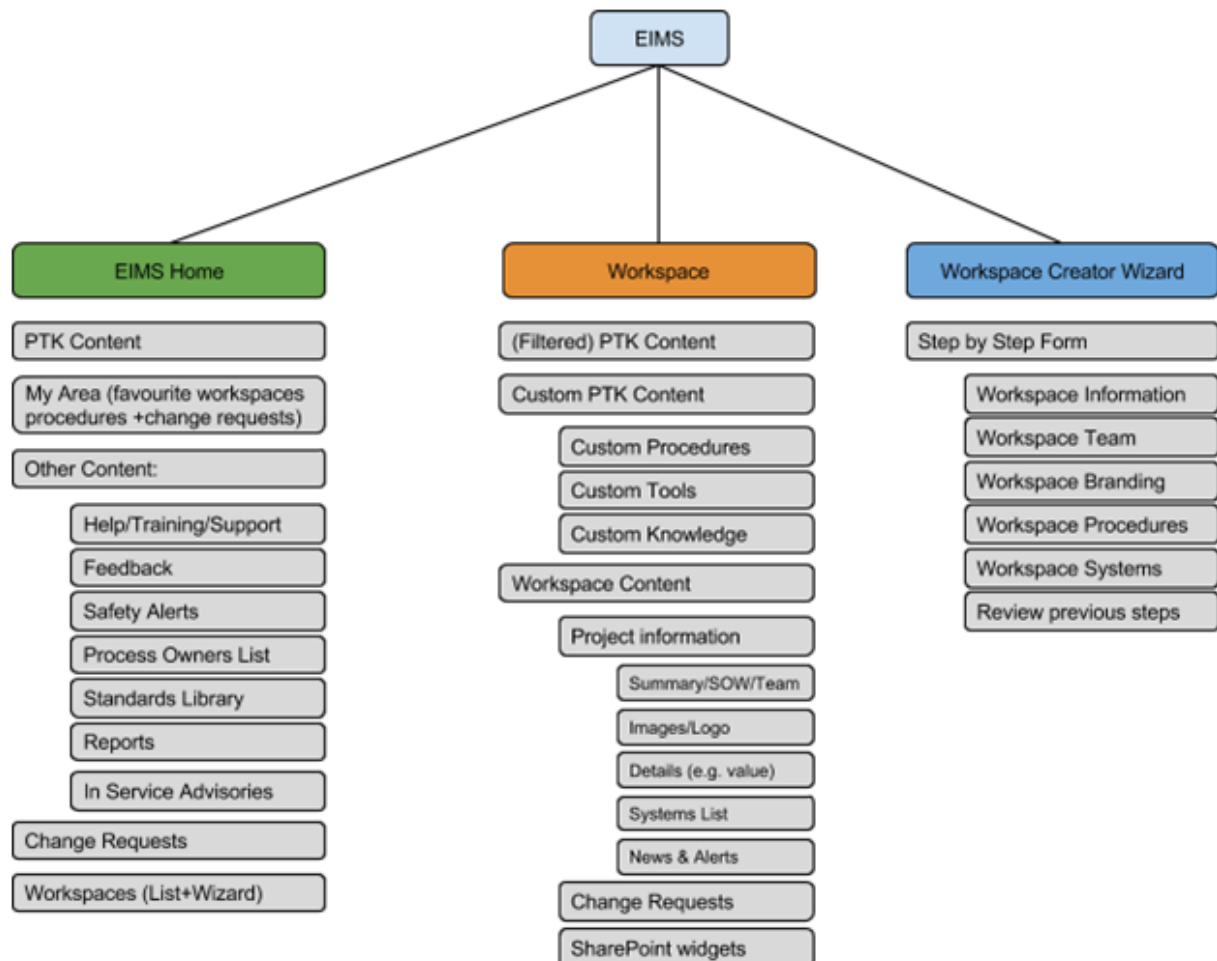
- The ability to search for procedures, tools and knowledge by keyword (Revised function)
- The ability to browse procedures, tools and knowledge by management area, including content specific to that management area, such as the key people: sponsors & subject matter experts(Revised function)
- The ability to log change requests and track your change requests (Revised function)
- The ability to browse a list of all workspaces (New function)
- The ability to favourite a workspace/Procedure (Existing function)
- Announcements that are global to UGL, including safety alerts (Revised function)

Wizard - The workspace creation Wizard is a step-by-step process that allows users to create a Project Workspace for each of the 3 types

Project Workspaces - These are SharePoint sites that provide a filtered view of the EIMS procedures with additional functions. They are called "Project Workspaces" in this document to differentiate from "project", which is a type of project workspace.

Structure

The diagram below provides a structural overview of the EIMS, including the customisation options of Workspaces and the Wizard.



Functional Requirements

Overview

The Functional Requirements component of this document outlines all of the identified requirements for this project. The requirements list key outcomes that either **MUST**, **SHOULD** or **MAY** be met.

The requirements section does not detail how they are to be met (covered further down in the Functional Specifications section). Requirements address only items of functionality that will be needed. As such they are provided as a numbered list which allows us to go through them and check that they have been implemented as the project progresses.

At this stage there are a handful of requirements that have not been addressed in wireframes. For clarity these can be found on the Functional Requirements Spreadsheet. Some of these are listed as a **MUST** and it is worth considering whether or not they are in fact **MUST** requirements or if they are unnecessary.

Content Finder - Improved EIMS Search Function

What is referred to here as the “EIMS Content Finder” is a set of functionality for finding PTK Content and Custom PTK within a Workspace. There will be no distinction between “browsing” or “searching” so that the method for finding content is consistent throughout the system.

In this way even if you’re in the wizard looking for procedures to add to your project workspace it works the same as if you were looking for a procedure to use. This also includes “Policies & Guidelines” which are considered part of PTK content. That is, if you are browsing a management area you can see the policies & guidelines linked to it there is no reason that this should not also be available in search results.

There is however one exception, “people” are only relevant for each management area, as they are specifically the sponsors and the subject matter experts for an area. The people results do not show up in the search results.

Additional there will be an “advanced search” that takes advantage of the SharePoint search indexing capabilities.

The SharePoint advance search enables user to filter the result by management area, and different document types.

Functional requirements are listed below:

1	---	(HEADING) Content Finder
1.1.	MUST	Users MUST be able to browse PTK by Management area
1.2.	MUST	Users MUST be able to search for PTK by keyword
1.3.	MUST	Users MUST be able to use an advanced search that utilises SharePoint’s full text search index
1.4.	MUST	Users MUST be able to switch to advance search if they cannot find document in the standard search
1.5.	MUST	Users MUST be able to search for PTK within the management area that they have selected.
1.6.	MAY	Users MAY be able to narrow their list of search results by a management area.
1.7.	MUST	Users MUST be able to see relevant people inside a management area
1.8.	MUST	Users MUST be able to see a list of systems used by each management area
1.8.1.	MUST	Users MUST be able to go to a PDF “Systems Map” for all systems
1.9.	MUST	It MUST be possible to apply further filters
1.9.1.	MUST	It MUST be possible to filter by Content Type (Procedures, Tools, Knowledge and Policies & Guidelines + People if in a management area)
1.9.1.1.	SHOULD	Procedures SHOULD show a streamlined view with less meta data than is shown with Tools & Knowledge
1.9.1.2.	MUST	Tools & Knowledge MUST have a different template which identifies which procedures they are connected to.

1.9.1.3.	SHOULD	There SHOULD be a simple way to show Tools or Knowledge linked to multiple procedures
1.9.1.4.	MUST	People MUST have a different template
1.9.1.5.	SHOULD	Policies & Guidelines SHOULD have a different template
1.9.1.6.	MUST	Content type results MUST default to procedures
1.9.1.7.	SHOULD	It SHOULD be possible to filter content even further by “sub-type” where applicable. E.g. the “type” of tool or knowledge.
1.9.2.	MUST	It MUST be possible to filter by Sector (e.g. UGL Rail)
1.9.2.1.	MUST	It MUST be possible in the back-end to tag PTK with multiple sectors when it is added to the system allowing content to appear in more than one search.
1.9.2.2.	MAY	It MAY be possible that users can save their settings identifying that they would like future searches to use the same sector filter.
1.9.2.3.	MUST	Backend configuration MUST allow results filtered to a specific sector to also include content from “All sectors”
1.9.2.4.	MUST	Backend configuration MUST allow results filtered by the “All Sectors” sector to include content from any sector
1.9.2.5.	MUST	The default filter for Sector MUST be set to All
1.9.2.6.	SHOULD	It SHOULD be possible to further filter by sub-sector
1.9.3.	MUST	It MUST be possible to filter by Region (e.g. Australia)
1.9.3.1.	MAY	In the back-end it MAY be possible to tag content with multiple locations
1.9.3.2.	MAY	It MAY be possible that users can save their settings, identifying that they would like future searches to be filtered by the same location.
1.9.3.3.	MUST	The default filter for Location MUST be set to Global
1.9.3.4.	MUST	Searches for a specific location MUST also show results for Global
1.10.	MUST	When searching / browsing for content the system MUST limit the user to select only one of each of these filters: Management Area, Sector, Content Type, Location
1.11.	SHOULD	The search results or list of content within a management area SHOULD show a breadcrumb trail identifying which filters have been applied
1.12.	MUST	When a management area has been selected it MUST show the management area’s content
1.12.1.	MAY	This management area specific content MAY include a banner
1.12.2.	MUST	Management Area content MUST include a description
1.12.3.	MUST	Management Area content MUST include a list of systems
1.12.4.	MUST	Management Area content MUST include a link to the global systems map
1.12.5.	MUST	Management Area content MUST include a link to their UConnect page
1.12.6.	MUST	Management Area content MUST include a link to their “area map”
1.13.	MUST	All lists of Procedures, Tools or Knowledge MUST be grouped by a process
1.13.1.	SHOULD	It SHOULD be possible to filter content by process
1.14.	MUST	The interface MUST show an indicator of the following for all procedures, tools & knowledge: New (within last 30 days), Updated (within last 30 days), Restricted (to some users)
1.14.1.	MAY	The interface MAY show these indicators for Policies & Guidelines

A handful of example use cases are below:

Use Case: Lorna can go to EIMS landing page and click “support it” then “Quality Management” from the management area bar, EIMS should take the user to the Quality management area landing page with a filtered view of Quality management documents.

If a user already selects their sector or region, the system should remember the personal setting and only display the selected sector/region documents with in the Quality Management area.

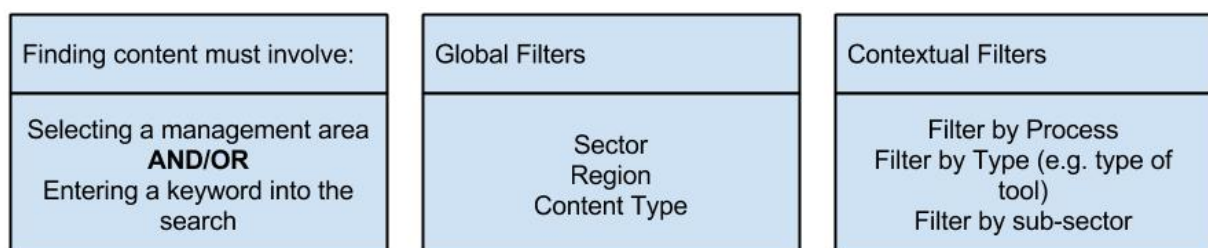
Use Case: Eugene knows exactly what he is looking for, so he types the name of the procedure into the search box. Lo and behold it’s the first item that comes up. He wonders if there should be an “I’m feeling lucky” button like Google, but that’s not a requirement.

Use Case: Lilly types “recruitment” into the search only to realise that there are a lot of recruitment related procedures. So she goes to the Project Management management area and doesn’t lose her search results - they just get filtered to that management area.

Use Case: Bruno is looking for an HR related procedure for his management area. While there he filters for UGL power related procedures for Australia. The only HR procedure that meets his criteria is a Global procedure for all sectors - luckily this applies to him as much as anyone else - that’s why it was tagged with Global and All Sectors.

Use Case: Jane always thought quality procedures were just tacked on to the end of a tender to look impressive. While looking for a procedure in Quality Management she found a description of what the quality team do and realised how crucial they are to every project.

This diagram explains the options for searching, browsing and filtering content:



Individual Procedures

Procedures are the fundamental component of the EIMS and serve as the backbone of the system. They have links to associated procedures, tools and knowledge for that procedure, as well as any applicable Policies & Guidelines. In Project Workspaces there may also be custom tools and knowledge which are linked to an existing procedure but which do not modify the procedure itself.

Functional requirements are listed below:

2	---	(HEADING) Individual Procedures
2.1.	MUST	Procedures MUST show the full text of the procedure
2.2.	MAY	Procedures page MAY show the left hand navigation
2.3.	MUST	Procedures MUST show the linked Tools, Knowledge and Policies & Guidelines
2.4.	MUST	Procedures MUST show “Associated Procedures”
2.5.	MAY	Procedures MAY group together the following under the title “Related Content”: Tools, Knowledge, Policies & Guidelines, Associated Procedures
2.6.	MUST	Procedures MUST show certain specific metadata (decided in design)
2.7.	MUST	Procedures MUST have the ability to show the user ALL metadata even if it is not surfaced immediately
2.8.	MUST	Procedures MUST show specific information about governance of that procedures (last updated and content owner)
2.9.	MUST	Procedures MUST show revision history
2.10.	MUST	Procedures MUST show somewhere for users to make a change request
2.11.	MUST	Procedures MUST include other tools
2.11.1.	MUST	MUST have a favourite option
2.11.2.	MUST	MUST have an alert option
2.11.3.	MUST	MUST have a print option (which combines all of the related content and exports it as a single PDF)
2.11.4.	MAY	The print function MAY give the user the option to select from possible related content to combine/print
2.11.5.	SHOULD	The print option SHOULD allow users to either print or have a PDF emailed to them

Use Case: Andy has gone from a rogue employee working on projects without a care for the standard way of doing things. He always preferred reading thing on paper to on-screen and found navigating the old EIMS too difficult. But now he can't believe how simple it is to print a procedure – not only does he get the procedure text itself, but he also has the option to select which related content gets printed as well. When it's easy to access it's easy to follow.

EIMS Home

The EIMS home page will also contain the following other content. Functional requirements are listed below:

3	---	(HEADING) EIMS Home
3.1.	MUST	The EIMS MUST have space for additional content
3.1.1.	MUST	MUST have a My Favourites Area (my favourite workspaces, my change requests, etc.) which:
3.1.1.1.	MUST	MUST have the technical object for the person using the page
3.1.1.2.	MUST	MUST have the person's change requests
3.1.1.3.	MUST	MUST have their favourited procedures
3.1.1.4.	MUST	MUST have their favourited projects
3.1.1.5.	MUST	MUST have the ability to view all favourites
3.1.2.	MUST	MUST have a link to the Change Requests portal
3.1.2.1.	MUST	MUST show counts of New/Updated/Restricted/In Progress
3.1.2.2.	MUST	MUST have a last 30 days count
3.1.2.3.	MUST	MUST have a year to date count
3.1.3.	MUST	MUST have a link/links to Help / Training / Support
3.1.4.	MUST	MUST have a link to Feedback
3.1.5.	MUST	MUST have a link to Reports
3.1.6.	MUST	MUST show News & Alerts
3.1.6.1.	MUST	MUST have a way to display Safety Alerts
3.1.6.2.	MUST	MUST have a way to view all News & Alerts, which provides a way to update the News & Alerts
3.1.7.	MUST	MUST have a link to In Service Advisories
3.1.8.	MUST	MUST have a link to Process Owners List
3.1.9.	MUST	MUST have a link to Standards Library
3.1.10.	MUST	MUST have a link to the Central License Registry
3.1.11.	MUST	MUST have a link to List of Projects (i.e. list of project workspaces)

Use Case: After a few days of taking support requests, the EIMS Support Team have finally stopped answering the question "are Safety Alerts still on the EIMS?" Everyone is now use to where the information has moved and they all agree that grouping them together with news & alerts was a great decision.

Project workspaces

Project workspaces will include the following variations to the content finder as well as some additional project specific content: e.g. the project team and project news. Additionally tenders will have their own specific area called GTC Approval.

Functional requirements are described below:

4	---	(HEADING) Project workspace Specifics
4.1.	MUST	Project workspace MUST have some Content Finder variations
4.1.1.	MUST	MUST show filtered content from the EIMS specific to that project, as identified in the wizard
4.1.2.	MUST	MUST show custom content generated for that project:
4.1.2.1.	MUST	MUST show custom procedures
4.1.2.2.	MUST	MUST show custom tools & knowledge
4.1.2.3.	MUST	MUST show custom tools & knowledge attached to existing EIMS procedures which have been imported but otherwise unchanged
4.1.3.	MUST	MUST allow users to create custom procedures in the project workspace
4.1.3.1.	SHOULD	SHOULD allow the use of an existing procedures as a template
4.1.3.2.	MUST	MUST allow users to link existing Tools & Knowledge from the IMS to a custom procedure
4.1.4.	MUST	MUST allow users to add custom Tools & Knowledge to custom procedures in the workspace
4.1.5.	MUST	MUST allow users to attach custom Tools & Knowledge to EIMS procedures without modifying them
4.1.6.	MUST	the backend functionality MUST put the "Procedure Logo" selected in the wizard on top of any printed or PDF generated procedures inside the workspace
4.2.	MUST	Workspaces MUST have access to the capabilities List
4.2.1.	MUST	The capabilities list MUST show all capabilities, even if no procedures have been selected for that management area
4.2.2.	SHOULD	The management area list SHOULD show a count of procedures in each management area
4.3.	MUST	Workspaces MUST have the ability to re-run the wizard to make relevant changes
4.4.	MUST	Workspaces MUST have a change request option
4.5.	MUST	Workspaces MUST have access to content created in the Wizard
4.5.1.	MUST	MUST show the workspace information (such as summary & SOW)
4.5.2.	MUST	MUST show workspace specifics (such as start date and value)
4.5.3.	MUST	MUST show workspace branding (
4.5.4.	MUST	MUST show workspace systems
4.5.5.	MUST	MUST have an icon to allow users archive the project site.
4.5.6.	MUST	MUST show key contact
4.5.7.	MUST	MUST show workspace team

4.6.	MUST	Workspaces MUST have a Custom Home Page
4.6.1.	MUST	MUST look distinct to the EIMS
4.6.2.	MUST	MUST have a function to re-run the wizard
4.6.3.	MUST	MUST have a function to archive the workspace
4.6.4.	MUST	MUST have a way to bookmark/favourite the workspace
4.6.5.	MUST	News & Alerts MUST be filtered to be workspace specific
4.6.6.	MUST	Changes MUST be filtered only to those relevant for this workspace
4.6.7.	MUST	Changes MUST show EIMS/IPMS changes instead of 30days/YTD
4.6.8.	MUST	For Tenders there MUST be some custom functionality
4.6.8.1.	MUST	Tender home MUST show a countdown clock for tender submission deadline
4.6.8.2.	MUST	Tender home MUST have an icon to allow users archive the tender site, and select the tender result from a drop down
4.6.8.3.	SHOULD	Tender SHOULD have new function for gate review and approval.
4.6.8.4.	MUST	Tender home MUST show a mile-stone timeline
4.6.8.5.	MUST	Tender home MUST show a link to allow users to manage the tender (e.g. tender docs)
4.6.9.	MUST	For Projects there MUST be some custom functionality
4.6.9.1.	MUST	Project home MUST have a link to the latest monthly dashboard
4.6.9.2.	MUST	Project home MUST show a countdown or timeline to project completion
4.7.	MUST	MUST have a workflow to create Custom Procedures Workspaces
4.7.1.	MUST	MUST allow users to write custom procedure
4.7.2.	MUST	A notification MUST go to a pre-defined list of people when a request to create custom procedures is made
4.7.3.	SHOULD	The custom procedure SHOULD go through approval workflow in order to get published
4.7.4.	SHOULD	A notification SHOULD go to a list of people once the custom procedure is published
4.8.	MUST	Project Workspaces of type tender MUST have a "GTC Approval" section
4.8.1.	MUST	The GTC Approval section MUST show the 3 approval gates: Gate A, Gate B and Gate C
4.8.1.1.	SHOULD	There SHOULD be a visual indicator to show which gates have been completed
4.8.1.2.	SHOULD	There SHOULD be a visual indicator to show which is the current active gate
4.8.1.3.	SHOULD	There SHOULD be a visual indicator to show that a gate is to-be completed
4.8.2.	MUST	There MUST be a function that allows the Project Workspace owner to upload the Tender Approval Document
4.8.3.	MUST	If the Tender Approval Document has been uploaded it MUST be shown to users
4.8.3.1.	MUST	If users do not have permission to see the Tender Approval Document they MUST be shown an appropriate notice and prevented from accessing the file
4.8.4.	MUST	The GTC Approval MUST have, under each gate, a list of people which need to give their approval

4.8.4.1.	MUST	For each person to give approval it MUST show their name, title, the status of their approval, and the date that status was put in place (statuses are: Request, Approved, Approved with conditions, Rejected)
4.8.4.2.	MUST	If the person has Approved with Conditions, the conditions MUST be shown next to their name
4.8.4.3.	MUST	It MUST show which person is next in line to approve

Use Case: Jodie knows that all of the procedures relevant to the ACME Site can be found on the EIMS. Whenever she logs in she selects the ACME Site from her list of favourite projects and can find the information that she needs.

Use Case: Barry wants to know if the Giant Upcoming Project tender has been approved. He goes to the GTC Approval section for the tender and can see that John Smith needs to provide his approval for Gate C to be completed.

Project workspace Creator Wizard

Simply called “the Wizard”, this is a tool that lets users create their own project workspaces. The wizard will follow the general structure outlined in these functional requirements:

5	---	(HEADING) Wizard
5.1.	MUST	The Wizard MUST be a step-by-step form
5.1.1.	SHOULD	SHOULD allow any user with SharePoint access to create a project workspace
5.1.2.	SHOULD	SHOULD be able to retrieve most information from SAP if user provides a tender/project number
5.1.3.	MUST	MUST create the workspace as soon as the user is finished
5.1.4.	MUST	In the back-end it MUST notify appropriate staff that such a space has been created
5.1.5.	MUST	MUST allow the user to choose what type of workspace it is from one of these three: Tender, Project or Site
5.1.6.	MUST	MUST provide wording and field variations depending on whether it is a tender, project or site
5.1.7.	MUST	MUST contain a space to enter workspace specific details (photo, description, value, timeline, etc.)
5.1.8.	MUST	MUST contain a space to enter the names of team members as well as JV and Client counterparts
5.1.9.	MUST	The team members inputs MUST vary depending on the “delivery” type that was selected, showing only JV/Alliance partners if applicable
5.1.10.	MUST	MUST contain the contact details of the primary contact for the project (i.e. the project manager)
5.1.11.	MUST	MUST allow user to choose a different logo for the procedure
5.1.12.	MUST	MUST have a mechanism to select and add procedures to the workspace
5.1.12.1.	MUST	This MUST use the EIMS Content Finder interface
5.1.12.2.	SHOULD	SHOULD show a count of how many have been added for each management area
5.1.13.	MUST	MUST have a mechanism to add systems used by that project (in a general sense, shown on the workspace home page and not necessarily linked to a procedure).
5.1.13.1.	MUST	These MUST be grouped by Lead/Win/Do/Support
5.1.13.2.	MUST	Systems MUST be for each management area, except for IT
5.1.13.3.	FUTURE	FUTURE - systems links could hyperlink to the required systems
5.1.13.4.	MUST	MUST allow users to add custom systems for each area
5.1.13.5.	SHOULD	SHOULD have a generic icon for both internal systems without an icon and for custom systems
5.1.13.6.	MUST	MUST allow users to add more than one custom system
5.1.13.7.	SHOULD	Users SHOULD be allowed to leave system selection blank
5.1.13.8.	MUST	Users MUST be able to select more than one system

5.1.14.	MUST	MUST show a progress indicator to the user
5.1.15.	MUST	MUST provide the user a summary of the wizard before completion
5.1.15.1.	MUST	The summary MUST provide a prominent spot to print the entire summary for review
5.1.16.	MUST	MUST allow the user to go back to a previous step and edit it
5.1.17.	MUST	MUST allow the user to “re-run” the wizard on an existing project
5.2.	MUST	Wizard MUST have variations to the Content Finder
5.2.1.	MUST	MUST pre-filter results to a specific sector based on earlier steps in the wizard
5.2.2.	MUST	MUST NOT allow users to change sector in this step
5.2.3.	MUST	MUST show results for procedures
5.2.4.	MUST	MUST NOT allow users to search for different content types (only procedures allowed)
5.2.5.	SHOULD	SHOULD show a count of how many procedures have been added out of how many are available
5.2.6.	MUST	MUST allow users to add all procedures in a process group
5.2.7.	MUST	MUST allow users to add all procedures in a management area

Use Case: Adro thinks using the wizard to select procedures is as simple as shopping for Italian loafers online - just select what you want and hit add to cart.

Project Workspace List

As well as favourite workspaces that users can bookmark there will also be a list of all workspaces. The details for the list are described in the functional requirements below:

6	---	(HEADING) List of Workspaces
6.1.	MUST	The workspace list MUST have columns with headings
6.1.1.	MUST	The list of workspaces MUST have the following headings that provide details about the workspace (in order): Project/Tender/Site Number, Project/Tender/Site Name, Key Contact, Status, Sector, Sub-sector, Region, Location, Workspace Type (Project, Tender or Site)
6.1.2.	MAY	It MAY be required to show the creation date of the workspace in order to allow sorting by date (i.e. show newest vs oldest)
6.1.3.	SHOULD	It SHOULD be possible to sort the list by heading
6.2.	MUST	The list MUST have filters
6.2.1.	MUST	It MUST be possible to filter by sector
6.2.1.1.	MUST	It MUST be possible to filter by sub-sector
6.2.2.	MUST	It MUST be possible to filter by region
6.2.2.1.	MAY	It MAY be possible to filter by location
6.2.3.	MUST	It MUST be possible to filter by workspace type – workspace type should be text to accommodate OOTB SharePoint
6.3.	MUST	The list MUST contain the following other Functionality
6.3.1.	MUST	It MUST be possible to search the projects
6.3.2.	MUST	It MUST be possible to start the wizard from this part of the system
6.3.3.	MAY	It MAY be possible to favourite a workspace from the workspace list
6.3.4.	MUST	It MUST be possible to open a list of archived projects
6.3.5.	FUTURE	In the FUTURE users could open multiple workspaces as tabs within the page

Use Case: Rhiannon needs to find a custom procedure that was created for an archived project. On the All Projects section she can find the “Archives” icon and browse the list of archived projects for the one she needs.

Global UI Components

The following functional requirements have been identified for global UI components:

7	---	(HEADING) User Interface
7.1.	MUST	There MUST be several Global UI Components
7.1.1.	MUST	ALL pages MUST have the SharePoint header (the blue and grey bars)
7.1.1.1.	MAY	There MAY be a toggle button which hides the header for users
7.1.2.	MUST	All pages MUST have the “Ribbon” area, i.e. the site header, which contains the following:
7.1.2.1.	MUST	MUST have UGL Navigation (mostly links to UConnect and Systems)
7.1.2.2.	MUST	MUST have EIMS Navigation that allows the users to return to: The EIMS, All Workspaces, currently open Workspace (if applicable)
7.1.3.	MUST	All pages MUST have the EIMS footer which provides a set of utility links for the user (e.g. reports, process owners list, etc.)
7.1.4.	MUST	All pages MUST have a list of any relevant “tools” which include the following functionality
7.1.4.1.	MUST	MUST have the ability to print pages
7.1.4.2.	MUST	MUST have the ability to email pages
7.1.4.3.	MUST	MUST have the ability to request a change to a procedure and any documents
7.1.4.4.	MUST	MUST have the ability to be alerted when a procedure changes available on any procedure page
7.1.4.5.	MUST	MUST have the ability to “favourite” a procedure
7.1.4.6.	MUST	MUST have the ability to “pdf” a procedure
7.1.4.7.	MUST	MUST have the ability to “favourite” a workspace/procedure
7.1.4.8.	MUST	MUST have the ability to re-run the wizard on a workspace
7.1.4.9.	MAY	MAY have the ability to go to “my profile” page
7.2.	MUST	There MUST be a universal Content Finder sidebar
7.2.1.	MUST	A search function (which searches the index) MUST exist
7.2.1.1.	SHOULD	The sidebar SHOULD hold the search function
7.2.1.2.	MUST	Index search MUST search procedure titles, document titles, policies & guidelines titles and team member names
7.2.1.3.	MUST	Index search MUST search meta data
7.2.1.4.	MUST	The search area MUST contain a link to the advanced search
7.2.2.	MUST	The ability to filter content in the EIMS by sector and region MUST exist
7.2.2.1.	SHOULD	The sidebar SHOULD hold these filters
7.2.3.	MUST	The sidebar MUST appear on the EIMS and Project workspace home pages
7.2.4.	MUST	The sidebar MUST appear on the index search and the capabilities pages

Functional Specifications

Overview

The specifications component of this document outlines the way in which the new EIMS will work. The document will include screenshots of the wireframes and notations about each page and how exactly it functions.

These specifications along with the wireframes have been informed by the requirements listed above. Some additional specifications have been added that are not related to any requirements but exist either for user experience or aesthetic reasons.

While the requirements list is simply a checklist they are not referred to in this component. The specifications are here to tell us how the interface is going to work and what functionality to expect. It will be necessary for the UGL team to review the final product with regards to both the requirements outlined above as well as the details about functionality below.

EIMS Specifications

Global Elements

1. UConnect Nav - The existing links from the UConnect navigation. These will be a mega menu that expands on click
 - a. SharePoint toggle - a bar that shows / hides the SharePoint admin menu
2. Site Header
 - a. General header area
 - b. Tabs that indicate what part of the system you are in. Shown are EIMS, All Projects. If you are in a project workspace it will show the name of that project as a tab (shown later)
 - c. A space (currently blank, details later) for various page tools
3. Site Footer
 - a. The footer area
 - b. Small UGL logo
 - c. List of links to various pages not otherwise navigable via the EIMS

EIMS Home Page

1. PTK Search
 - a. This will search for all procedures, tools, knowledge and policies & guidelines for that search term. It will be directly influenced by the settings in the box below. It MAY be influenced by the management area you are in (i.e. allow you to search only within that management area) however for User Experience reasons that might not be advisable.
 - b. The advanced search will take you to the SharePoint search functionality. This will take you to a default search results page with no results showing and give you the opportunity to do a detailed search. This detailed search will be a full text search, including text contained within a document. It will also search content that is not necessarily PTK
2. Filter settings box
 - a. This box allows for searching and browsing to be filtered by sector, sub sector and region.
 - b. The options are editable and will default to "All Sectors" and "Global"
 - c. The user will have the option to save these settings for the future, so that all subsequent searches will use the same filter unless it is changed
3. Management Area List
 - a. A list of management areas grouped by 4 headings
 - b. The entire management areas list is collapsible or expandable
 - c. Individual groups – lead it, win it, do it, support it are also expandable
 - d. In the final design it may be required to add an extra set of filters under each management area. These will activate only when you enter one those management areas and will allow you to filter the list of results by the processes in that management area.
4. An introduction to the EIMS along with a banner and text
5. News and alerts
 - a. Clicking either the heading of this box or the view all button will take you to all news and alerts
 - b. News and alerts are listed by title, published date and category
 - c. Clicking a category will take you to the list of news and alerts but filtered down to that category (page may not be a literal filter, but at the very least will show only the items for that category)
6. Procedures box
 - a. Shows the status of changes to procedures
 - b. Shows count of new procedures
 - c. Shows count of updated procedures
 - d. Shows count of how many restricted procedures have been added
 - e. Shows count of procedures with changes in progress
 - f. 30D = in the last 30 days
 - g. YTD = year to date
 - h. The number shows how many items have happened in the specified time period. Clicking the number takes you to the change requests area

7. My Favourites Area

- Shows a bit of information about the user as well as pertinent info to them
- The name and title of the user as per the account they are logged in with. Will show a profile image if they have one, or a default image if not
- The change requests they have in place for the entire EIMS
- A list of favourite procedures or projects, showing at most 5 items
- Switches to a view of procedures
- Switches to a view of projects
- Selecting this link will open a new page with a list of all favourites

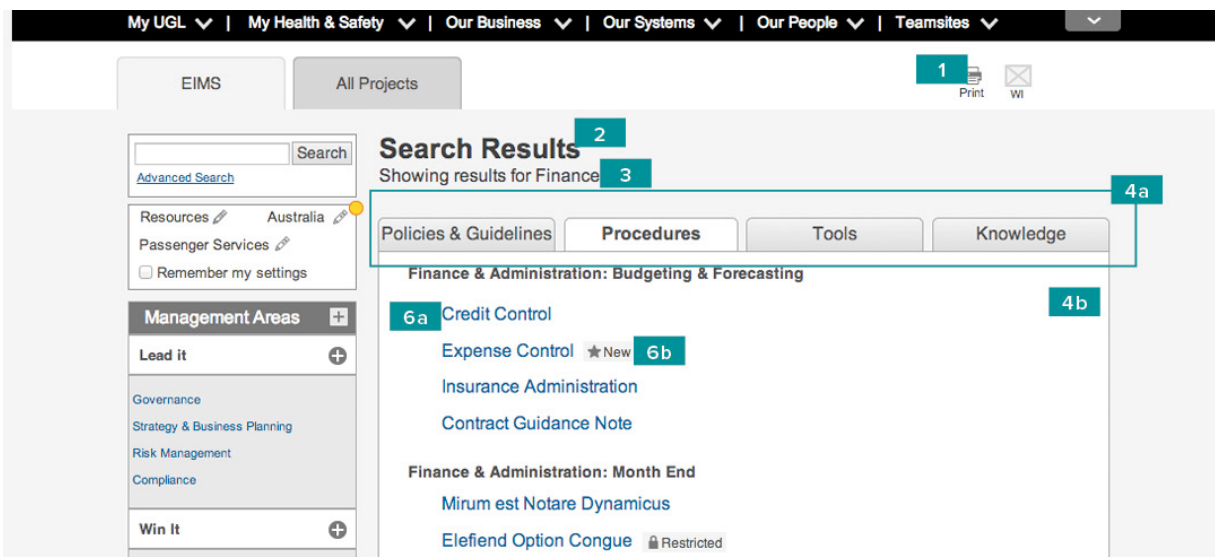
The screenshot displays the EIMS interface with various components labeled for reference:

- Navigation Bar:** Includes links for My UGL, My Health & Safety, Our Business, Our Systems, Our People, and Teamsites.
- Search Bar:** Labeled 1a, with a Search button and an Advanced Search link (1b).
- Filters:** Includes Resources (2a), Australia (2b), and a checkbox for Remember my settings (2c).
- Management Areas:** A sidebar menu (3a) with sections like Lead it (3c), Win It, Do It, and Support it, each containing sub-items.
- Welcome to EIMS:** A large central banner (4) with placeholder text.
- News & Alerts:** A section (5a) displaying recent news items (5b, 5c) with dates and titles.
- Procedures:** A section (6a) showing a table of procedures categorized by status (New, Updated, Restricted, In Progress) with counts (6b, 6c, 6d, 6e) and YTD values (6f, 6g).
- My Favourites Area:** A sidebar (7a) showing user information (7b), a list of favourites (7c), and a View All Favourites button (7g).

The footer contains the UGL Logo and a list of links: Sitemap, Standards Library, CLR, Contact, Feedback, FAQ, EIMS Manual, Reports, News & Alerts, and Process Owners.

Index Search

1. Print page tool – this page has only one tool. This does a standard browser print function
2. Title of the page – this is search results
3. Sub title of the page – this shows the term the person searched for along with any other relevant information (up to UGL to decide), which may include any filters that have been applied
4. Types of content
 - a. Each tab represents a type of content that may have come up in the search results.
 - b. A space for the results grouped by management area and process area. If little or no results come up there may be a note offering an advanced search of the same terms. There may be a need to offer pagination (or to show more than one page of results would involve advanced search)
5. Policies & Guidelines
 - a. A list of policies and guidelines and their linked procedures
 - b. Clicking the “X other” link will reveal any additional procedures that this is linked to. The first item that shows up will be determined in the back-end, likely alphabetical or by document number
6. Procedures
 - a. A list of procedures
 - b. Icons that depict special status with regards to change
7. Tools
 - a. A list of tools and their linked procedures, as well as the type of tool
 - b. Advanced filtering options that allow the user to narrow the list of tools
8. Knowledge
 - a. A list of knowledge and their linked procedures, as well as the type of tool
 - b. Advanced filtering options that allow the user to narrow the list of knowledge



My UGL | My Health & Safety | Our Business | Our Systems | Our People | Teamsites

EIMSAll ProjectsPrintWI

Search

[Advanced Search](#)

ResourcesAustralia

Passenger Services

☐ Remember my settings

Management Areas

Lead it

Governance

Strategy & Business Planning

Risk Management

Search Results

Showing results for Finance

Policies & Guidelines

Procedures

Tools

Knowledge

5a

Finance & Administration: Budgeting & Forecasting

Name	Linked Procedures
Lorem Ipsum Dolor sit amet consectetur	Insurance Administration and 4 other
Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis	Legentis Quarta gothica and 3 other

My UGL | My Health & Safety | Our Business | Our Systems | Our People | Teamsites

EIMSAll ProjectsPrintWI

Search

[Advanced Search](#)

ResourcesAustralia

Passenger Services

☐ Remember my settings

Management Areas

Lead it

Governance

Strategy & Business Planning

Search Results

Showing results for Finance

Policies & Guidelines

Procedures

Tools

Knowledge

7a

Finance & Administration: Budgeting & Forecasting

Name	Type	Linked Procedures
Lorem ipsum dolor sit amet	Checklist	Insurance Administration and 4 other

Advanced Search Options7b

My UGL | My Health & Safety | Our Business | Our Systems | Our People | Teamsites

EIMSAll ProjectsPrintWI

Search

[Advanced Search](#)

ResourcesAustralia

Passenger Services

☐ Remember my settings

Management Areas

Lead it

Governance

Strategy & Business Planning

Search Results

Showing results for Finance

Policies & Guidelines

Procedures

Tools

Knowledge

8a

Finance & Administration: Budgeting & Forecasting

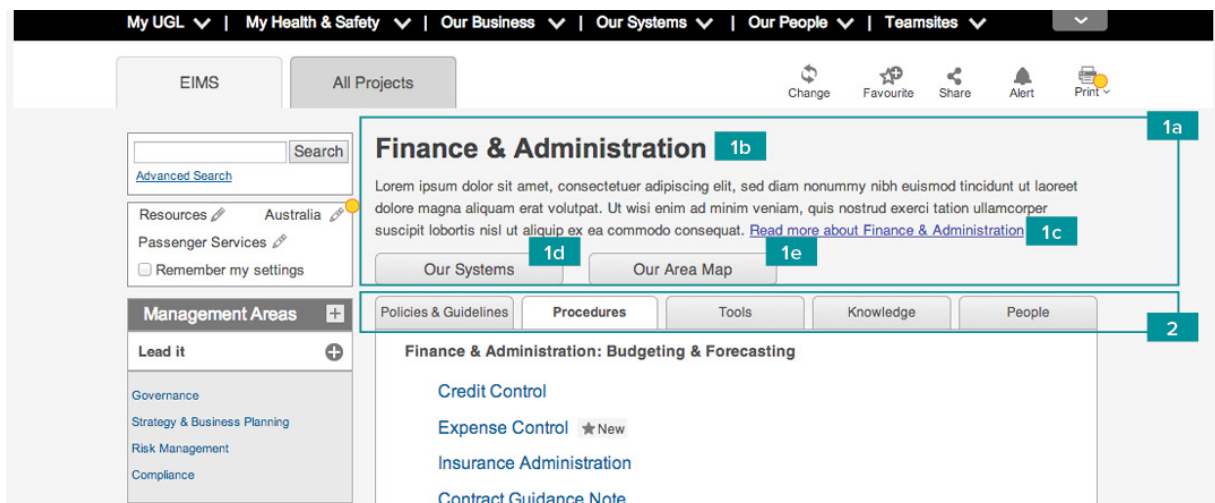
Name	Type	Linked Procedures
------	------	-------------------

Advanced Search Options8b

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Management Areas

1. Header area
 - a. To differentiate from the general search results management areas have an introductory header
 - b. The header contains the page title as the name of the management area
 - c. The short introduction to the management area also gives room for an inline link which can take them to another page (likely to be on UConnect)
 - d. A link to our systems produces a lightbox which shows a list of system icons used by this management area. A button will also be in place for a “system map” which is the specific system map for that area
 - e. This opens a PDF which is the area map for that management area
2. List of content – List of content under this area works much the same way as search results, appearing in tabs. The key difference is the addition of the people tab
3. People tab
 - a. The people tab has 3 sections, Corporate sponsor, business sponsor and sector sponsor
 - b. People are listed by name, title, contact details and their location
 - c. People also have their sector listed on the side. The sector for Corporate Sponsor and Business Sponsor is UGL Engineering
4. Tools
 - a. This page has additional tools
 - b. The change button takes you to the change request area specifically for this management area (e.g. to add procedures or change the text at the top)
 - c. The favourite button will add this management area to your list of all favourites
 - d. The share button allows you to share a link to this page via email
 - e. The alert button allows you to be notified when there are alerts for this page
 - f. The print tool works as described previously



Procedure Page

1. The name of the procedure as the page title
2. The surfaced meta data for this page
3. The meta data icon can either take the user to a back end page or it can reveal any meta data that has not been surfaced directly on this page
4. The business sponsor for this procedure and their contact card
5. Procedure content
6. Related Content
 - a. A list of related content for this procedure (i.e. that has been referenced in the body of the procedure)
 - b. Each of these boxes can be toggle to show / hide
 - c. All of the boxes can be toggled / untoggled at once
7. Governance
 - a. Document approval status as per the current system
 - b. The revision history
8. Tools
 - a. This page has the standard tools previously described with one exception
 - b. The print button on this page has a drop down which allows the user to send the page via email or send it to the printer. A dialogue box will appear once an option is selected allowing the user to specify which related content they would like included in the print job

All Projects

1. Filter

- The all projects filter is different to the EIMS content filter. It lets you filter the list of projects based on specified criteria
- The filter list can be toggled, this toggles all the items
- Sector, Region and Type can be toggled open/closed individually
- Sectors can be toggled to reveal sub/sector

2. Project header

- Page title
- Custom intro text

3. Search projects by name or meta data

4. Button to run the wizard

5. View Archives – open new page that takes you to a list of archived projects

6. Table listing projects – table is sortable by heading

My UGL ▾ | My Health & Safety ▾ | Our Business ▾ | Our Systems ▾ | Our People ▾ | Teamsites ▾

EIMS

All Projects

Print

View Archives

5

1a

Filters

1b

Sector

1c

+

Defence

Power

1d

+

Power Distribution

Power Generation

Power Transmission

Substations

Rail

Resources

Transport & Tech Systems

Water & Civil

Region

+

Australia

New Zealand

South-East Asia

India

Type

+

Tender

Project

Site

2a

All Projects

2b

Search by Projects

3

Search

4

Create Project/Tender/Site

6

Project ID	Name	Key Contact	Status	Sector	Sub-Sector	Region	Location	Type
123456789	Lorem Ipsum Dolor Sit Amet adipiscing Project	Elizabeth Adams	Mobilisation	Resources	Lorem Ipsum	AU	NSW	Project
789456123	Claritas est etiam processus	Phillip Milton	Awarded	Power	Dolor sit amet	SEA	MYS	Tender
456789123	nunc nobis videntur	Christopher Jackson	On-going	Rail	Lorem Ipsum	NZ	AKL	Site
741085296	soluta nobis eleifend option congue nihil	Sandra Peters	Execution	Rail	Decima	AU	WA	Project
123456789	Lorem Ipsum Dolor Sit Amet Adipiscing Project	Elizabeth Adams	Practical	Resources	Lorem Ipsum	AU	NSW	Project
789456123	Claritas est etiam processus	Phillip Milton	Tender Failed	Power	Dolor sit amet	SEA	MYS	Tender
456789123	nunc nobis videntur	Christopher Jackson	On-going	Rail	Lorem Ipsum	NZ	AKL	Site
741085296	soluta nobis eleifend option congue nihil	Sandra Peters	Completion	Rail	Decima	AU	WA	Project
123456789	Lorem Ipsum Dolor Sit Amet Adipiscing Project	Elizabeth Adams	Completion	Resources	Lorem Ipsum	AU	NSW	Project
789456123	Claritas est etiam processus	Phillip Milton	In progress	Power	Dolor sit amet	SEA	MYS	Tender
456789123	nunc nobis videntur	Christopher Jackson	Closed	Rail	Lorem Ipsum	NZ	AKL	Site
741085296	soluta nobis eleifend option congue nihil	Sandra Peters	Completion	Rail	Decima	AU	WA	Project

Project Workspace

General Workspace Home

1. Management areas show a count of how many procedures are provided for that management area
2. Project / Tender / Site header
 - a. Shows an image representing this project workspace
 - b. Shows an introduction and ID number
 - c. Shows relevant meta data (sector, location and for all except site also client name)
3. Page Tools
 - a. A tool to archive the project
 - b. A change request area that can be used to make changes to content for this project workspace, including adding of custom tools & knowledge or custom procedures
 - c. The ability to re-run the wizard
4. Filter box - This box is locked down on the project workspaces and cannot be re-filtered as all of these options have been already selected in the wizard
5. Tabbed content – Summary
 - a. News & Alerts similar to the EIMS except that they are specific to that project
 - b. Procedures section is similar to EIMS except these are filtered to that specific project. Additional instead of 30D and YTD it shows how many of each have been brought in from the EIMS and how many are unique to this project
 - c. My favourites area is similar to the EIMS except that the “change requests” and favourites are filtered to this project
 - d. Address shows the location of the project / tender / site from wizard
 - e. Key contact is the “key contact” team member selected in the wizard
 - f. Systems shows the systems used by this project / tender / site from the wizard
6. Scope of Work as described in the wizard
7. Team
 - a. Shows the key contact as per the summary page
 - b. Additional if this is a tender / project it shows who the big manager is / was
 - c. Table that shows the list of team members mapped to the name of the partner / client and their area of responsibility

My UGL

My Health & Safety

Our Business

Our Systems

Our People

Teamsites

EIMS

All Projects

Project Name...

Archive

Change

Share

Favourite

Alert

Update

Print

Search

Advanced Search

Resources

Australia

Passenger Services

Management Areas

Lead it (12)

Governance (7)

Strategy & Business Planning (14)

Risk Management (2)

Compliance (0)

Win It (1)

Opportunity & Bid Management (2)

Project Name

123456789

Logo

Client Name Lorem Ipsum

Resources > Metals & Minerals

South-East Asia > Indonesia

Project Value

\$2,000,000

Lump Sum

Contract #

1234567

Delivery Type

UGL

Project Schedule

80% Complete

5 MOS

Mar 2014

June 2015

Summary

Scope of work 6

Project Team

Client: Magna Aliquam Erat Volutpat

Location: Luptatum

My UGL

My Health & Safety

Our Business

Our Systems

Our People

Teamsites

EIMS

All Projects

Project Name...

Archive

Change

Share

Favourite

Alert

Update

Print

Search

Advanced Search

Resources

Australia

Passenger Services

Management Areas

Lead it (12)

Governance (7)

Strategy & Business Planning (14)

Risk Management (2)

Compliance (0)

Win It (1)

Opportunity & Bid Management (2)

Do It (6)

Design & Engineering (0)

Project Management & Controls (12)

Subcontractor,Supplier & Materials (0)

Plant & Equipment (2)

Project Name

123456789

Logo

Client Name Lorem Ipsum

Resources > Metals & Minerals

South-East Asia > Indonesia

Project Value

\$2,000,000

Lump Sum

Contract #

1234567

Delivery Type

UGL

Project Schedule

80% Complete

5 MOS

Mar 2014

June 2015

Summary

Scope of work

Project Team

Key Contact 7a

John Smith

Project Manager

j.smith@ugllimited.com

02 9999 1234

Bid Manager 7b

John Smith

Project Manager

j.smith@ugllimited.com

02 9999 1234

7c

UGL

Joint Venture 1

Joint Venture 2

Client

Tender Home

1. Tender information from the wizard
2. Tender due date from the wizard
3. SharePoint technical object that shows the tender timeline
4. Document Control & Records Management System – link to external page
5. Gate Approval
 - a. Shows the gates for approving the tender
 - b. This either shows an upload field (for the tender workspace creator), nothing if no file is uploaded or a link to a word doc if one has been uploaded. The word doc is restricted and will error out if users don't have access
 - c. Each of the gates are listed in order
 - d. Any people who have already set their status for the tender are shown in regular text along with the date they approved / approved with conditions / declined
 - e. If they approved with conditions the text they entered for their conditions is shown
 - f. If they have not yet approved then their name is greyed out
 - g. If the previous gate has not been approved the entire next gate is shown greyed out

Governance (7)

Strategy & Business Planning (14)

Risk Management (2)

Compliance (0)

Win It (1) +

Opportunity & Bid Management (2)

Do It (6) +

Design & Engineering (0)

Project Management & Controls (12)

Subcontractor, Supplier & Materials (0)

Plant & Equipment (2)

Construction & Manufacturing (0)

Tender Value

\$2,000,000

Lump Sum

Contract #

1234567

Delivery Type

UGL

Due Date

15 September 2014

11 January

15 January

19 January

23 January

27 January

31 January

04 February

Pricing Review #2

09 January

Draft #2 - Pens Down

17 January

Assessment Workshop

22 January

Final Review - Pricing

28 January

Final Pricing

04 February

Summary

Scope of work

Tender Team

Gate Approval

Tender News & Alerts

Document Control & Records Management System

Design & Engineering (0)

Project Management & Controls (12)

Subcontractor, Supplier & Materials (0)

Plant & Equipment (2)

Construction & Manufacturing (0)

Asset Operations & Maintenance (4)

Support it (5) +

Finance & Administration (2)

Human Resources (3)

Information Systems (19)

Customer & Communications (0)

HSSE (13)

Quality Management (0)

Commercial (5)

Legal (0)

Summary

Scope of work

Tender Team

Gate Approval 5a

5b View Tender Approval Document

Gate A 5c

Name	Title	Date	Status
Elizabeth Anderson	Project Manager	16/6/2014	Approved with conditions Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim.
Christopher Thomas	Project Manager	18/6/2014	Approved
Elizabeth Anderson	Lorem Dolores	19/6/2014	Appro Tender
Christopher Thomas	Lorem Dolores	22/6/2014	Approved with conditions Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim.

Gate B

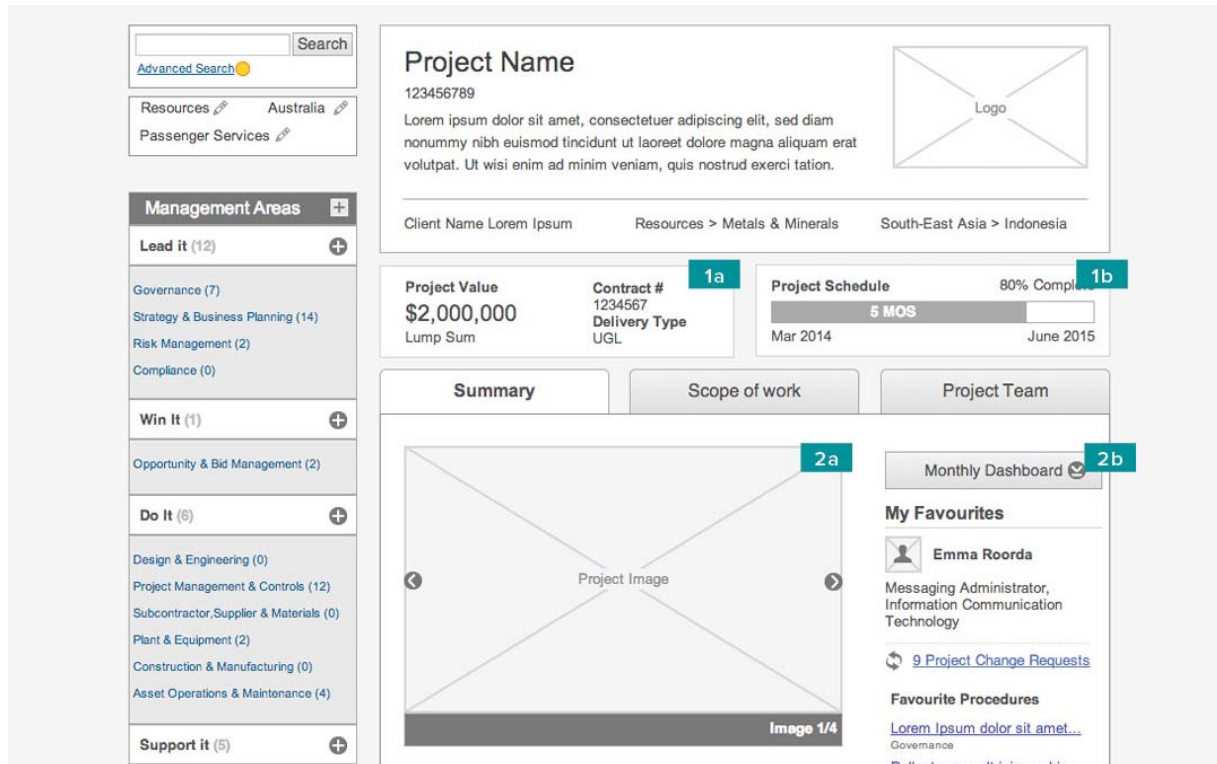
Name	Title	Date	Status
Elizabeth Anderson	Project Manager	16/6/2014	Approved with conditions Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim.
Christopher Thomas	Project Manager	18/6/2014	Approved
Elizabeth Anderson	Lorem Dolores	19/6/2014	Requested
Christopher Thomas	Lorem Dolores	22/6/2014	Requested

Gate C 5g

Name	Title	Date	Status
Elizabeth Anderson	Project Manager	16/6/2014	Requested
Christopher Thomas	Project Manager	18/6/2014	Requested
Elizabeth Anderson	Lorem Dolores	19/6/2014	Requested
Christopher Thomas	Lorem Dolores	22/6/2014	Requested

Project Home

1. Project information
 - a. Project information from the wizard
 - b. A progress bar based on start / end date from the wizard
2. Summary
 - a. Images from the project
 - b. Link to a PDF for monthly dashboard



Site Home

1. Site information

- Site information from the wizard
- Number of employees and year commenced operation from the wizard

My UGL | My Health & Safety | Our Business | Our Systems | Our People | Teamsites

EIMSAll ProjectsSite Name...

ArchiveChangeShareFavouriteAlertUpdatePrint

Search

Advanced Search

ResourcesAustraliaPassenger Services

Management Areas

Lead it (12)

Governance (7)
Strategy & Business Planning (14)
Risk Management (2)
Compliance (0)

Win It (1)

Opportunity & Bid Management (2)

Do It (6)

Design & Engineering (0)
Project Management & Controls (12)
Subcontractor, Supplier & Materials (0)

Site Name

123456789

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation.

Resources > Metals & MineralsSouth-East Asia > Indonesia

Revenue Range

\$2,000,000

FY

Delivery Type

UGL

1a

No. of Employee x,xxx

Year Commenced Operations 2010

1b

Summary

Scope of work

Site Team

Site News & Alerts

Donec aliquam justo id purus ultricies. vitae hendrerit tellus eges. Ut mattis metus et dui tincidunt aliquip ex ea commodo consequat

15.04.2014 | [Safety Alert](#)

Donec aliquam justo id purus ultricies. vitae hendrerit tellus egestas. Ut mattis metus et dui tincidunt aliquip consectetur

18.04.2014 | [Reports](#)

My Favourites

Emma Roorda

Messaging Administrator,
Information Communication
Technology

[Site Change Requests](#)

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Project Workspaces - Management Area Pages

1. Workspace summary
 - a. Shows the summary information for the project / tender / site
 - b. This pushes the other content down
2. Page tools - all of the page tools are retained from the home page of the workspace
3. Filtered content - all of the content for the management areas is filtered from the selections made in the wizard
4. Change area & custom content – the change request section is how to add custom procedures to a workspace

The screenshot displays the 'Project Workspaces - Management Area Pages' interface. At the top, a navigation bar includes dropdown menus for 'My UGL', 'My Health & Safety', 'Our Business', 'Our Systems', 'Our People', and 'Teamsites'. Below this, a main header features tabs for 'EIMS', 'All Projects', and 'Project Name...'. A sidebar on the left lists 'Management Areas' categorized into 'Lead it (12)', 'Win It (1)', 'Do It (6)', and 'Support it (5)'. The main content area is titled 'Project Name' and includes a search bar, a list of resources (Australia, Passenger Services), and a 'Finance & Administration' section. This section is further divided into 'Budgeting & Forecasting' and 'Month End' sections, each containing a list of items with status indicators (New, Restricted, Updated). A 'Change' button is visible in the top right corner.

Project Workspaces - Procedure Page

1. Workspace summary
 - a. Shows the summary information for the project / tender / site
 - b. This pushes the other content down
2. Management Areas sidebar – unlike the regular procedures page, this retains the management area sidebar
3. Related Content - Content that has been added to this procedure without changing it appears in the Related Content list just like all other content. i.e. there is no way to distinguish between unique content for this workspace and EIMS content
4. Change area – the change area for a procedure in the workspace will have 1 extra piece of functionality: it will be possible to add custom tools and knowledge to this procedure without changing its content. This allows projects to reference tools that are specific to the project and not to be used by the rest of UGL

Wizard

Start of the wizard

1. Lightbox - This will appear as a lightbox over the page
2. Body copy - Introductory text will explain how it works
3. Options - User must select one of the 3 options to continue
4. Start wizard – opens an appropriate version of the wizard for each of the 3 options

The image shows a 'Project Wizard' lightbox with the following elements:

- 1**: A teal square in the top-left corner of the lightbox.
- 2**: A teal square next to the introductory text: "Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat."
- 3**: A teal square next to the radio button options: "Tender", "Project", and "Site".
- 4**: A teal square next to the "Start Wizard" button.

The lightbox contains a title "Project Wizard", a paragraph of placeholder text, three radio button options, and two buttons: "Cancel" and "Start Wizard".

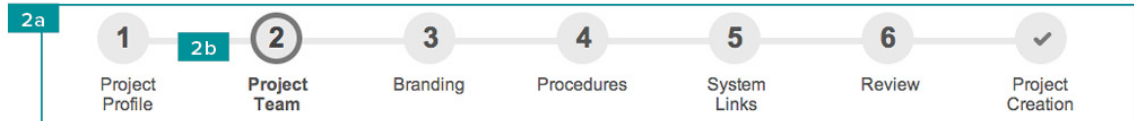
Wizard Steps - General

1. Header – the wizard retains the header elements from the rest of the EIMS though notably there are no page tools
2. Progress indicator
 - a. The progress indicator shows the user what step they are on
 - b. Any step that they have already completed as well as their current step can be accessed by clicking the number. Steps that are not clickable (i.e. future steps) should be greyed out, this way the furthest step that the user can see is always visually apparent. Further, it should not prevent the user going back a step if some required fields are not filled out and going back should save their progress on the current page
 - c. Each step has a name which may vary depending on the option select, e.g. Project Profile / Tender Profile / Site Profile
 - d. Each step has introductory text that explains what to do on this step
 - e. The save and continue button takes you to the next step
 - f. The back button is visible only if there is a previous step (i.e. won't show up on step 1)
3. Bottom Progress buttons – these are extra save / back buttons at the bottom of the page

1

EIMS

All Projects



2c

Project Team

2d

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl

2f

<

Save & Continue

2e

Project Manager		Bid Manager	
Name	<input type="text"/>	Name	<input type="text"/>
Email	<input type="text"/>	Email	<input type="text"/>
Phone	<input type="text"/>	Phone	<input type="text"/>
Position	<input type="text"/>	Position	<input type="text"/>

	UGL Team	Client
Sector EGM	<input type="text" value="Sector EGM"/>	<input type="text" value="Sector EGM"/>
Project Manager	<input type="text" value="Project Manager"/>	<input type="text" value="Project Manager"/>
Project Control	<input type="text" value="Project Control"/>	<input type="text" value="Project Control"/>
Design & Engineering	<input type="text" value="Engineering"/>	<input type="text" value="Engineering"/>
Procurement	<input type="text" value="Procurement"/>	<input type="text" value="Procurement"/>
Construction/Operations	<input type="text" value="Construction/Operations"/>	<input type="text" value="Construction/Operations"/>
Commercial	<input type="text" value="Commercial"/>	<input type="text" value="Commercial"/>
HSSE	<input type="text" value="HSSE"/>	<input type="text" value="HSSE"/>
HR/IR	<input type="text" value="HR/IR"/>	<input type="text" value="HR/IR"/>
Quality	<input type="text" value="Quality"/>	<input type="text" value="Quality"/>
Finance	<input type="text" value="Finance"/>	<input type="text" value="Finance"/>
IT	<input type="text" value="IT"/>	<input type="text" value="IT"/>

3

<

Save & Continue

>



Wizard Steps - Step 1

1. Required Fields – all fields are required for this step
2. Auto fill from project number – when adding a project number and pressing “import from SAP” the wizard will attempt to prefill as much data as possible for the user
3. Scope of work – the labels for each text area will populate as headings in the workspace “scope of work” section
4. Field labels – some field labels will change depending on the option selected at the start. E.g. Tender Number vs Project Number
5. Fieldset labels – some fieldset labels will also change, e.g. Tender Information vs Project Information
6. Tender & Project: Tender Schedule – have a start / end date
7. Site: Site Schedule – has a “year commenced operation” field
8. Site: # of employees on site – a box to enter the number of employees working at the site
9. Delivery Type –
 - a. Selecting the delivery type has additional impact
 - b. For JV or Alliance the user can enter >0 and <2 names for each partner company
 - c. Selecting JV or Alliance will add extra columns of “team” for each JV / Alliance partner in Step 2
10. Sector & sub sector - The sector and sub-sector have additional impact. This will filter the available procedures to choose from in Step 4, limiting to only the ones applicable to this sector / sub-sector
11. Region - The region options have additional impact. This will filter the available procedures to choose from in Step 4, limiting to only the ones applicable to this sector / sub-sector

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Save & Continue >

1

Project Information

2

Project Number ?

Import from SAP

4

Project Name

Region

- Select -

Location

- Select -

Address

Sector

Transport & Tech Systems

Sub-sector

- Select -

Client Name

Project Schedule

Start Date

11/11/2014

End Date

11/11/2014

Commercial Details

Delivery Type

- Select -

Contract Number

Project Value

Contract Type

- Select -

Summary

Project Summary

0/200 Characters

3

Scope of work

Site Overview

Project Scope of Work

Technical & Professional Services

Save & Continue

Wizard Steps - Step 2

1. Required fields - fields are only required if specified in explanation before, otherwise they may be left blank
2. Project Manager – this is a required field
3. Bid Manager
 - a. The bid manager field does not appear when the wizard is for a site
 - b. This is a required field
4. Team columns
 - a. Default is UGL Team & Client
 - b. Extra columns will appear depending on what delivery type was set in Step 1



Project Team

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< Save & Continue >

1

Project Manager 2

Name

Email

Phone

Position

Bid Manager 3

Name

Email

Phone

Position

4a

	UGL Team	Client
Sector EGM	Sector EGM	Sector EGM
Project Manager	Project Manager	Project Manager
Project Control	Project Control	Project Control
Design & Engineering	Engineering	Engineering
Procurement	Procurement	Procurement
Construction/Operations	Construction/Operations	Construction/Operations
Commercial	Commercial	Commercial
HSSE	HSSE	HSSE
HR/IR	HR/IR	HR/IR
Quality	Quality	Quality
Finance	Finance	Finance
IT	IT	IT

4b

< Save & Continue >



Wizard Steps - Step 3

1. Required Fields – all fields are required for this step
2. Logo – this is the logo that appears on the workspace home page. This will default to the UGL logo if none is selected
3. Procedure Logo – this is the logo that appears on printed procedures. This will default to the UGL logo if none is selected
4. Picture Gallery – this is a repeater field for uploading images of the project. This will only appear on Project and not on Tender or Site

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<

Save & Continue >

1

Logo

2

Project Logo ?

Browse

3

Procedure Logo ?

Browse

Picture Gallery

4

Gallery Image 1

Browse

<

Save & Continue >

UGL Logo

[Sitemap](#) / [Standards Library](#) / [CLR](#) / [Contact](#) / [Feedback](#) / [FAQ](#) / [EIMS Manual](#) / [Reports](#) / [News & Alerts](#) / [Process Owners](#)

Wizard Steps - Step 4

1. Management Areas Sidebar – This works just like on the EIMS except that it shows a count of how many procedures they have added for each area as well as how many were added for each group (lead/win/do/support)
2. Add All for Management Area – checking this box will automatically add all the procedures in this management area. Unchecking it removes all of them. This is reinforced to the user by checking/unchecking the relevant checkboxes beneath it
3. Add All for Process – checking this box adds all of the procedures for the process, unchecking it removes them. This is reinforced to the user by checking/unchecking the relevant checkboxes beneath it
4. Procedure Checkbox – this check box determines whether or not a procedure is added to this project workspace
5. Added procedure count – works like a shopping cart counter and shows how many have been added in total

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<

Save & Continue >

1

Management Areas

Lead it (12)

Governance (7)

Strategy & Business Planning (14)

Risk Management (2)

Compliance (0)

Win It (1)

Opportunity & Bid Management (2)

Do It (6)

Design & Engineering (0)

Project Management & Controls (12)

Subcontractor, Supplier & Materials (0)

Plant & Equipment (2)

Construction & Manufacturing (0)

Asset Operations & Maintenance (4)

Support it (5)

Finance & Administration (2)

Human Resources (3)

Information Systems (19)

Customer & Communications (0)

HSSE (13)

Quality Management (0)

Commercial (5)

Legal (0)

5

Added Procedures (xx)

2

Finance & Administration

3

Budgeting & Forecasting

Credit Control

4

Expense Control

★ New

Insurance Administration

Contract Guidance Note

Month End

Mirum est Notare Dynamicus

Elefiend Option Congue

Restricted

Investigationes Demonstraverunt

Lectores Legere quod

★ New

Project Structuring

Mirum est Notare Dynamicus

Updated

Elefiend Option Congue

Investigationes Demonstraverunt

Lectores Legere quod

<

Save & Continue >

UGL Logo

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Wizard Steps - Step 5

1. Required fields – there are no required fields in this step
2. Systems are grouped by the 4 key areas
3. Each key area further groups the systems by Management area, listed in their sidebar order, left->right then up->down
4. If the system has no icon it will show a generic “system” icon
5. Selecting other reveals a text box and a repeater field so that multiple “other” systems can be added

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<

Save & Continue >

1

Lead It

2

Governance

3

System Logo

System Name

System Logo

System Name

Other

Add others

☒

System Name

+Add Another

5

Strategy & Business Planning

System Logo

System Name

System Logo

System Name

Other

Add others

Risk Management

System Logo

System Name

System Logo

System Name

Other

Add others

Compliance

System Logo

System Name

System Logo

System Name

Other

Add others

Win It

Opportunity & Bid Management

System Logo

System Name

System Logo

System Name

Other

Add others

Do It

Design & Engineering

System Logo

System Name

System Logo

System Name

Other

Add others

Project Management & Controls

System Logo

System Name

System Logo

System Name

System Logo

System Name

System Logo

System Name

System Logo

System Name

Other

Add others

Subcontractor, Supplier & Materials

Wizard Steps - Step 6

1. Preview button – this shows them a preview (nature of preview TBD by UGL team)
2. “Create” button – this replaces the next button
3. Print for review button – allows the user to print this summary page
4. Summary headings – each of the previous steps is grouped by the name of the step.
Clicking “edit” takes the user back to that step allowing them to edit it. This achieves the same effect as clicking the number for that step in the progress indicator
5. The layout of the summary is slightly different to the way they are represented in the edit screens. This will be further defined in design

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Edit

Project Information

Project Schedule

Commercial Information

Summary

Project Summary

Scope of work

Site Overview

Project Scope of work

Technical & Professional Services

Project Team

Edit

Key Contact

Bid Manager

UGL Team

Joint Venture 1

Joint Venture 2

Client

Sector EGM

John Smith

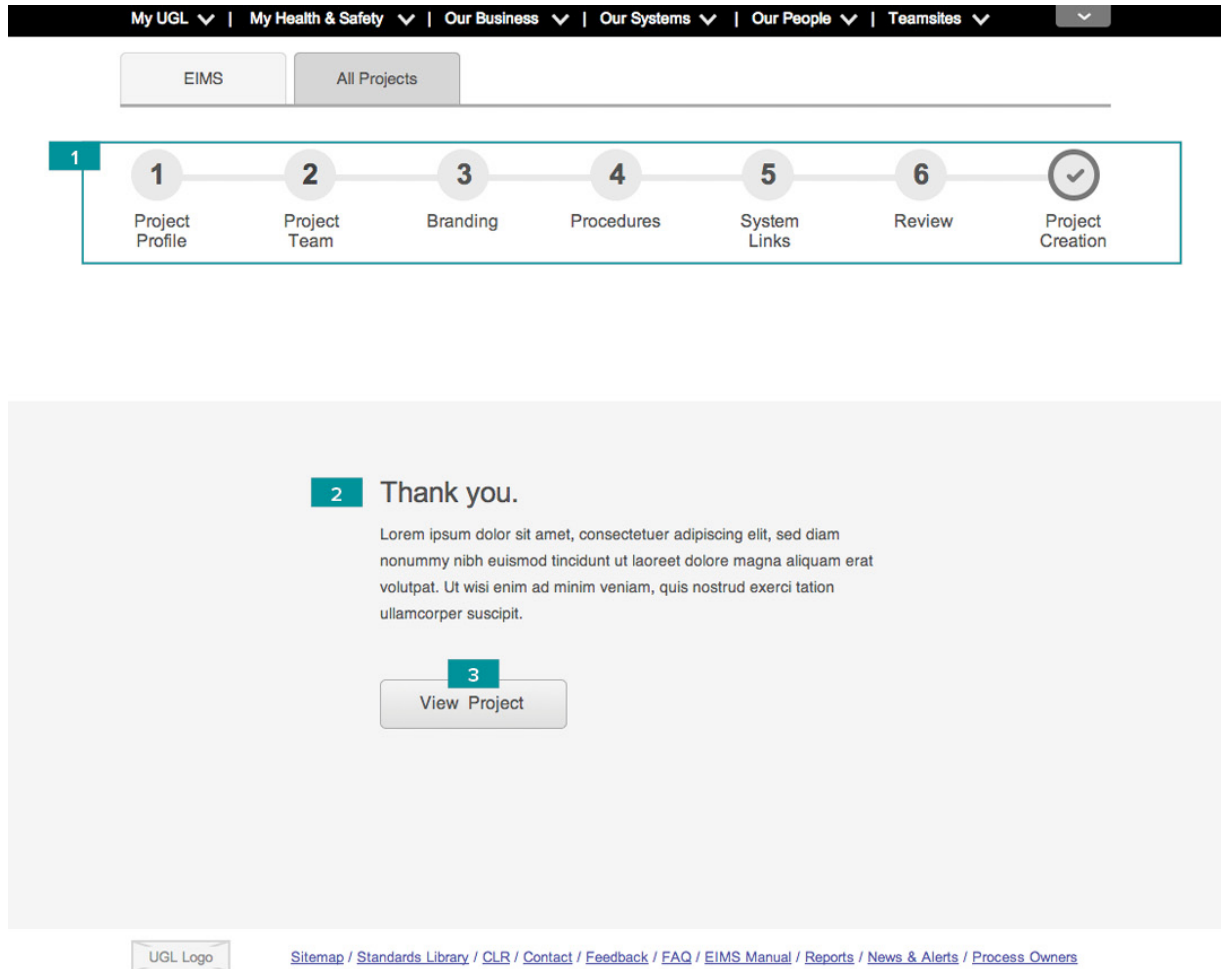
John Smith

John Smith

John Smith

End of Wizard

1. Progress bar - Once the wizard is run the progress bar is locked and the user cannot go back to the previous steps. The user will need to re-run the wizard by selecting that option from the page tools. Doing so would keep all of the previously populated items.
2. Page text – thank you title and text
3. View workspace button – takes the user to their project / tender / site which has been automatically created



Design Requirements

Identified Page Templates

We have identified the following templates for wireframe/design purposes:

EIMS Content Finder

1. Management area Index / Index Search
 - a. Variation: List of procedures
 - b. Variation: List of tools & knowledge
 - c. Variation: List of policies & guidelines
 - d. Variation: List of people
 - e. Variation: Custom Header for Management area Index
2. Procedure Page (w/ links to relevant T&K)

EIMS

3. EIMS home page

List of Workspaces

4. List of projects/tenders/sites

Project workspace

5. Workspace Home Page
 - a. Variation: Show overview
 - b. Variation: Show scope of work
 - c. Variation: Show team
 - d. Variation: Tender
 - e. Variation: Project
 - f. Variation: Site
6. Workspace Procedure Page - showing custom tools & knowledge

Wizard (variations for Tender / Project / Site)

7. Start - Select workspace type
8. Step 1 - Add workspace details
9. Step 2 - Form - Identify workspace team members
10. Step 3 - Upload workspace customisation (e.g. photo, logo)
11. Step 4
12. Add Systems used by this project
13. Find procedures (variation of the content finder w/ shopping cart like functions)
14. Summary page
15. Finishing / thank you page

Not wireframed but designed:

16. Generic Content - Content page with layout/structure that can be re-used elsewhere

Digital Garden Scope

Core

- Functional specifications document
- Wireframes for a total of 15 pages (including each variation)
- Concept design for EIMS home page
- Designs (PSDs) for 16x templates[^]
 - Responsive Resolution: 1440px wide
 - Responsive Resolution: 960px wide
 - Responsive Resolution: 720px wide
- Styleguide
 - Styleguide which includes detailed information including:
 - Margins, Padding & Indents
 - Font sizes, line-heights and modifiers (decoration, weight, slant)
 - Colours, Backgrounds, etc.
 - Layout structure, columns, etc.
 - Includes recommendations for 2 responsive breakpoint

[^] Please note we will not be doing the variations in the design, they are supplied in the wireframes.

Optional

- Pair programming time available for us to assist UGL developers if necessary
- SharePoint friendly HTML & CSS
 - HTML of each of the 12x templates
 - Using `<div class="ugl-[class-name]">` as the standard element instead of semantic markup (e.g. H1-H6, ul/li) or HTML5 markup (e.g. section, header)
 - CSS to target the required HTML
 - JavaScript will only be provided if agreed in advance that DG can achieve within the specified scope
 - Pages tested in IE8 at the following resolutions:
 - 1440x1024, 1024x768, 720x1024
 - Pages tested on an iPad 4 (iOS7) at both landscape and portrait orientation
 - Code WILL NOT be tested in SharePoint or integrated to Design Manager
 - Pair programming time will be provided to assist with integration but no specific guarantees can be made that HTML/CSS will work without error on SharePoint