# Financial Management Service
# Rapid Application Development
# Facilitation Manual

Rapid Application Development Staff
Financial Management Service
July 2007

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## Overview

Rapid Application Development (RAD) is a software development methodology that focuses on building applications in a short period of time; at FMS the timeframe used is 120 business days. The short timeframe allows the Business Owners to move quickly from the conceptualization of a desired application to the use of the application. However, the short timeframe forces the Business Owners to expect and accept compromises in initial usability and function, and to understand that full functionality will be achieved only after several releases of the application. The actual number of releases is dependent upon the complexity of the application to be developed.

This manual was created for use as a resource by FMS RAD facilitators, and includes information regarding the documentation and deliverables generated via the FMS RAD process, and a guide to the phases, expectations, and requirements of the FMS RAD process.

## History

In the past, the development of an application generally took a minimum of eighteen months from concept to production. Applications were built using earlier generations of development methodologies in which full-function applications were designed and built based on requirements that were frozen at a moment in time. Due to changes in existing laws, the passage of new laws, and the issuance of new guidelines and Executive Orders, this minimum eighteen-month time-lag between when the requirements were frozen and the application was delivered often resulted in the development of systems that were obsolete before they ever made it into production.

In 1991, in an industry-wide response to this problem, James Martin published *Rapid Application Development*. This book further expanded on the Rapid Iterative Production Prototyping (RIPP) methodology which Martin and Scott Schulz developed in the late 1980's. The focus of RIPP was the development of applications in short timeframes using small teams of qualified, motivated, and experienced staff. RAD expands the RIPP methodology by building the team using Business Owners and technical staff, harnessing the knowledge of these team members, empowering them to make decisions, and encouraging creative thinking to determine possible application functions. The team determines the scope of the Release at the onset, and adjusts the scope as necessary to ensure the Time Box deadline of 120 business days will be met. The functionality to be delivered in a Release is ruled by the Time Box; functionality may be sacrificed, but the Time Box is sacrosanct.

The original RAD methodology as created by James Martin was tweaked by the Bureau of Public Debt (BPD) in order to suit BPD's specific needs, and BPD has been successfully utilizing this modified version of the RAD methodology to develop its web applications since about 2000. BPD assisted FMS in FMS' first RAD effort—JFRAD—and since that first Release, FMS has modified the BPD RAD process to suit FMS' needs. On March 14, 2006, former Commissioner Richard L. Gregg, and former Deputy Commissioner (now current Commissioner) Kenneth R. Papaj announced that the Executive Board had decided to adopt the FMS modified version of RAD as the single methodology to be used in developing new FMS applications.

## Methodology

The FMS RAD Methodology is a process of software development, and as such is a piece of the overall FMS Governance/Software Development Lifecycle (SDLC) process, not a substitution for the Governance/SDLC process. Generally, the FMS RAD process begins during the Governance 'Select' Phase/SDLC 'Initiation' Phase/PMBOK 'Initiating' Phase, and ends during the Governance 'Evaluate' Phase/SDLC 'Implementation' Phase/PMBOK 'Closing' Phase. For additional information regarding the overall FMS Governance/SDLC process, visit the Information Resources "Governance, SDLC, and RAD Training" web page at:

http://intranet.fms.treas.gov/IRNew/GovSDLCRadTraining.htm or contact the Project Management Oversight Staff at (202) 874-6708.

An FMS RAD Release consists of six distinct phases: Start Up, Define, Design, Develop, Deploy, and Post Deploy. Prior to the beginning of the Start Up Phase, the Project Manager will work with the Business Owners and the Technical Lead to determine either the Release Start Date, which is the first day of Start Up, or the Release End Date, which is three days after the implementation or "Go Live" date. Upon entering one of these dates into the Project Plan template, the template will automatically update with start and end dates for each phase of the Release. These dates are suggestions and may be adjusted to suit the Release, recognizing that the 120 business day maximum Time Box is an absolute. Once the Phase Time Boxes have been agreed upon, they must be closely managed and adhered to strictly; any slip in the schedule is cause for immediate concern and action to preserve the target dates.

**Phases and Time Boxes**

The FMS RAD process is broken down into six distinct phases as follows:

| Time Boxes by Phase | | |
|---|---|---|
| Phase I | Start Up | 2-10 business days |
| Phase II | Define | 10-15 business days |
| Phase III | Design | 20-25 business days |
| Phase IV | Develop | 44-53 business days |
| Phase V | Deploy | 15-23 business days |
| Phase VI | Post Deploy | 3-4 business days |
| Total Time Box for Release: 120 business days | | |

The Time Box for a Release is 120 business days. Using the above guidelines, you may adjust your schedule to allow more or less time for a phase, however, the Release must not total greater than 120 business days.

**Required Documentation**

| **Document is Required**<br>**-Must be in FMS RAD template format**<br>**-Must be titled as shown** |
|---|
| Detailed Release Requirements |
| Ground Rules |
| Lessons Learned |
| Parking Lot |
| Project Requirements |
| RAD Project Plan |
| Release Requirements |

| **Content is Required**<br>**-Must be included in the documentation set**<br>**-May be included in any document or format** |
|---|
| Business Process Workflow |
| Business Rules and Program Specifications |
| Business User Profiles |
| Define Phase Daily Task Schedule |
| Glossary |
| Kick-Off Meeting Agenda |
| Meeting Resources Checklist |

| Content is Required<br>-Must be included in the documentation set<br>-May be included in any document or format |
|---|
| Minutes |
| Navigational Flow Diagram |
| RAD Project Team Roles and Responsibilities Roster |
| User Roles and Access Definitions |
| Web Page Inventory |

**Brief Descriptions of Accomplishments by Phase**

Start Up: the Project Manager will assemble a RAD Project Team, assign roles and responsibilities to team members, narrow down the requirements to be addressed, and conduct an official Kick-Off meeting.

Define: the Define Team will finalize exactly which Release Requirements will be addressed, create a prototype, break down each Release Requirement to a granular level, defining each aspect of each Release Requirement, conduct a management review and sign-off, and memorialize the final documentation in a configuration management (CM) tool.

Design: the Development Team will design how the Release Requirements will work, write the program specifications, conduct a management review and sign-off, and memorialize the final documentation in a CM tool.

Develop: the Development Team will code the system, perform unit, integration and system testing, conduct a management review and sign-off, and memorialize the final documentation in a CM tool. The Business Owners will write their User Acceptance Test Scripts (UAT).

Deploy: the Business Owners will conduct UAT while the Development Team prepares to go live.

Post Deploy: the Development Team will send the system into production and go live; the entire Project Team provides feedback on the process by forwarding their lessons learned to the Project Manager.

**Phase Overviews and Step-by-Step Guides**

Below are overviews and step-by-step guidance for the Start Up, Define, and Post Deploy Phases. The remaining phases, Design, Develop, and Deploy are purposefully not covered in detail in this document because it is appropriate to allow developers to accomplish these phases utilizing their individually established business practices. However, although FMS does not intend to dictate specific business practices to developers, FMS does expect developers to adhere to the FMS RAD methodology with respect to utilizing the phase format (i.e. fully creating the design during the Design Phase, having a management review, memorializing the agreed upon design using a CM tool, and then moving into the Develop Phase, etc.) and respecting and maintaining the Time Boxes.

All of the templates described below, as well as examples of completed documents for each template may be accessed via the FMS RAD web site at:

fms.treas.gov/RAD/index.html

This web site also has an email link to allow users to ask questions of the FMS RAD Staff.

***Phase I — Start Up***

**Overview:**

The Start Up Phase culminates in the Kick-Off Meeting. Prior to the Kick-Off Meeting, however, considerable work must be done to ensure the success of the Release. It is during the Start Up Phase that the Business Owners (Project Manager, Business Functional Lead, Executive Sponsor/Customer) will finalize the overall Project Requirements created during the Pre-select and Select Phases of the Governance Process. The Project Requirements document should include every feature and functionality, as seen from a high level perspective, that the Business Owners desire to be included in the application, with the understanding that the features and functionalities will be provided piece-meal over the course of several releases of the application. The Business Owners will also prioritize the features and functionalities so that the Technical Lead will understand which features or functionalities are most important to the Business Owners. *Note that the Project Requirements document will be finalized during the Start Up Phase of the first Release. Subsequent Releases will refer back to the original Project Requirements document; this document may be updated as necessary, but need not be created anew for each Release*.

Utilizing the Project Requirements document, the Technical Lead will determine the most logical sequence in which to develop and deliver the requested features and functionality, giving consideration to the priorities assigned by the Business Owners, and will provide the Business Owners with an estimate of specifically which features and functionality can be provided in the Time Box of the Release. The Business Owners and the Technical Lead will agree on the specific requirements that will be delivered from the Release, with the understanding that some of the agreed-upon features or functionality may be sacrificed, if necessary, to meet the Time Box deadlines. Once an agreement is reached, the Business Owners will create the Release Requirements document, to reflect the specific features and functionality to be delivered from the Release.

The Business Owners are responsible for creating the Business Process Workflow, and the Business User Profiles. These documents will be used extensively during the Define Phase and will enable the Define Team to be versed in the existing system functionality so that time is not wasted during the Define Phase discussing or answering questions regarding how the system currently works. These documents can also be useful to the Business Owners for creating the Project Requirements. The Business Process Workflow outlines the current work process the Business Owners utilize to accomplish the work, including any systems with which it currently interfaces. The Business User Profiles documents all the different roles that currently accomplish the work, and all the different roles that will continue to utilize the new application, including the data access levels of each role.

Many existing systems have been documented via Use Cases. If previously created Use Cases will continue to be utilized, they should be reviewed and updated as necessary during Start Up to ensure they are up-to-date.

The Glossary is a list of all acronyms and terms used by the Business Owners that are specific or unique to the business system or process. The Glossary may be updated as necessary during the FMS RAD process to incorporate technical terms or acronyms, or new terms or acronyms created during the FMS RAD process.

***A Step-by-Step Guide to Start Up***

**Step 1: Prioritize the Project Requirements**

| | Task Name | Duration | Resource Names |
|---|---|---|---|
| 2 | **Start Up Phase** | **10 days** | |
| 3 | Prioritize Project Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 5 | Create and Review RAD Project Plan | 9 days | Project Manager |
| 6 | Create and Review RAD Project Team Roles and Responsibilities Roster | 9 days | Project Manager |
| 7 | Create and Review Business Process Workflow | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 8 | Create and Review Business User Profiles | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 9 | Review any Existing Business Use Cases | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 10 | Create Glossary | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 11 | Create and Review Meeting Resources Checklist | 9 days | Project Manager |
| 12 | Perform Action Items in Meeting Resources Checklist | 9 days | Project Manager |
| 13 | Create and Review Define Phase Daily Task Schedule | 9 days | Project Manager |
| 14 | Create and Review Kick-Off Meeting Agenda | 9 days | Project Manager |
| 15 | **Conduct Kick-Off Meeting** | **1 day** | **Project Manager** |
| 16 | Review Documents Created During Start Up Including Ground Rules | 6 hrs | Project Manager |
| 17 | Deliver the Start Up Phase Documents into the CM Tool | 2 hrs | Project Manager |

Task: (3) Prioritize Project Requirements

Resources: Project Manager, Business Functional Lead, Executive Sponsor/Customer
Duration: 9 business days
Template: 'TEMPLATE Project Requirements.doc'

The Project Requirements document should have been created during the Pre-select and Select Phases of the Governance Process, which takes place prior to the commencement of the FMS RAD effort. However, if this document was not created previously, it must be created during the Start Up Phase. This document is a list and should encompass all the features and functions desired of the application; this list should not be limited to only what is expected to be delivered by the Release at hand. This document is not intended to be detailed descriptions of the features and functions—the features and functions listed should come from taking a high-level perspective of what the application must ultimately achieve, and no attempt should be made at this point to design how the features will be presented, or how the application will accomplish the functions. Each Project Requirement should be assigned a unique number that will be used to identify the Project Requirement throughout the multiple releases of the development effort.

Prioritize this list of requirements with the highest priority being '1', the second highest priority being '2', the third being '3', the fourth being '4', and so on. Do not simply mark requirements as high, medium or low; each requirement must be prioritized in numerical order so that the Business Owners can clearly convey their priorities to the Technical Lead. Using this prioritization will enable the Business Owners and Technical Lead to determine which of the Project Requirements will be addressed in the Release.

**Step 2: Create and Review Release Requirements**

| | | Task Name | Duration | Resource Names |
|---|---|---|---|---|
| 2 | | Start Up Phase | 10 days | |
| 3 | ✓ | Prioritize Project Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 4 | | Create and Review Release Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 6 | | Create and Review RAD Project Team Roles and Responsibilities Roster | 9 days | Project Manager |
| 7 | | Create and Review Business Process Workflow | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 8 | | Create and Review Business User Profiles | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 9 | | Review any Existing Business Use Cases | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 10 | | Create Glossary | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 11 | | Create and Review Meeting Resources Checklist | 9 days | Project Manager |
| 12 | | Perform Action Items in Meeting Resources Checklist | 9 days | Project Manager |
| 13 | | Create and Review Define Phase Daily Task Schedule | 9 days | Project Manager |
| 14 | | Create and Review Kick-Off Meeting Agenda | 9 days | Project Manager |
| 15 | | Conduct Kick-Off Meeting | 1 day | Project Manager |
| 16 | | Review Documents Created During Start Up Including Ground Rules | 6 hrs | Project Manager |
| 17 | | Deliver the Start Up Phase Documents into the CM Tool | 2 hrs | Project Manager |

Task: (4) Create and Review Release Requirements

Resources: Project Manager, Business Functional Lead, Executive Sponsor/Customer
Duration: 9 business days
Template: 'TEMPLATE Release Requirements.doc'

This document represents the agreement between the Business Owners and the Technical Lead with respect to the requirements that will be delivered by the Release. To come to this agreement, the Technical Lead will analyze the requirements presented by the Business Owners in the Project Requirements document, taking the priorities the Business Owners have attached to the Project Requirements into consideration, and estimate which Project Requirements can be delivered in the Release Time Box. The Technical Lead will advise the Business Owners of the Level of Effort (LOE) estimate, and once a consensus is reached, the Business Owners will memorialize the agreement utilizing the Release Requirements document. The Release Requirement number should be the same number assigned to the requirement in the Project Requirement document in order to avoid confusion when creating Requirement Traceability Matrices or similar documentation. The Release Requirements document will be utilized by the Define Team to create the Detailed Release Requirements, which will be used to create the Business Rules. Note that a sincere effort will be made to deliver the requirements outlined in the Release Requirements document, however, if necessary, some Release Requirements may be dropped (moved to the Parking Lot) in order to meet the deadlines imposed by the Release Time Box.

## Step 3: Define the Release Time Box and Release Team Members

| | | Task Name | Duration | Resource Names |
|---|---|---|---|---|
| 2 | | **Start Up Phase** | **10 days** | |
| 3 | ✓ | Prioritize Project Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 4 | ✓ | Create and Review Release Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 5 | | Create and Review RAD Project Plan | 9 days | Project Manager |
| 8 | | Create and Review Business User Profiles | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 9 | | Review any Existing Business Use Cases | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 10 | | Create Glossary | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 11 | | Create and Review Meeting Resources Checklist | 9 days | Project Manager |
| 12 | | Perform Action Items in Meeting Resources Checklist | 9 days | Project Manager |
| 13 | | Create and Review Define Phase Daily Task Schedule | 9 days | Project Manager |
| 14 | | Create and Review Kick-Off Meeting Agenda | 9 days | Project Manager |
| 15 | | **Conduct Kick-Off Meeting** | **1 day** | **Project Manager** |
| 16 | | Review Documents Created During Start Up Including Ground Rules | 6 hrs | Project Manager |
| 17 | | Deliver the Start Up Phase Documents into the CM Tool | 2 hrs | Project Manager |

A. Task: (5) Create and Review RAD Project Plan

Resource: Project Manager
Duration: 9 business days
Template: 'TEMPLATE RAD Project Plan.mpp'

The FMS RAD Project Plan template is a Microsoft Project document with the schedule of tasks and resources of an FMS RAD project. In order to personalize the template for your Release, you will either need to enter the Release Start Date, which is the first day of Start Up, or the Release End Date, which is three days after the implementation or "Go Live" date. These additional three days comprise the remainder of the Post Deploy Phase. If you choose to use the Start Date, change the template's Start Date field to your Release's start date. If you choose to use the End Date, change the 'Schedule From' field to 'Project Finish Date' and enter the Release's end date. Working with the Business Owners and Technical Lead, adjust the phase and task durations to suit the demands of your Release.

| | | | | |
|---|---|---|---|---|
| 2 | | **Start Up Phase** | **10 days** | |
| 3 | ✓ | Prioritize Project Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 4 | ✓ | Create and Review Release Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 5 | ✓ | Create and Review RAD Project Plan | 9 days | Project Manager |
| 6 | | Create and Review RAD Project Team Roles and Responsibilities Roster | 9 days | Project Manager |
| 9 | | Review any Existing Business Use Cases | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 10 | | Create Glossary | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 11 | | Create and Review Meeting Resources Checklist | 9 days | Project Manager |
| 12 | | Perform Action Items in Meeting Resources Checklist | 9 days | Project Manager |
| 13 | | Create and Review Define Phase Daily Task Schedule | 9 days | Project Manager |
| 14 | | Create and Review Kick-Off Meeting Agenda | 9 days | Project Manager |
| 15 | | **Conduct Kick-Off Meeting** | **1 day** | **Project Manager** |
| 16 | | Review Documents Created During Start Up Including Ground Rules | 6 hrs | Project Manager |
| 17 | | Deliver the Start Up Phase Documents into the CM Tool | 2 hrs | Project Manager |

B. Task: (6) Create and Review RAD Project Team Roles and Responsibilities Roster

Resource: Project Manager
Duration: 9 business days
Template: 'TEMPLATE RAD Project Team Roles and Responsibilities Roster.doc'

This document lists the names and contact information for each individual on the RAD Project Team and indicates which RAD Project Team members will be on the Define Team. Additionally, this document outlines the roles and responsibilities assigned to each individual, and the percentage of time the individual must be available during each phase. Insert the appropriate resource name and information for each RAD Project Team member. Note that all responsibilities must be assigned and fulfilled; however, the responsibilities can be divided among the roles in any fashion that suits the RAD Project Team member's skills. Refer to the RAD Project Team Roles and Responsibilities Roster Template for a complete listing of the responsibilities of a RAD Project Team.

### Step 4: Document the Working State of an Existing System

| | | Task Name | Duration | Resource Names |
|---|---|---|---|---|
| 2 | | **Start Up Phase** | **10 days** | |
| 3 | ✓ | Prioritize Project Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 4 | ✓ | Create and Review Release Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 5 | ✓ | Create and Review RAD Project Plan | 9 days | Project Manager |
| 6 | ✓ | Create and Review RAD Project Team Roles and Responsibilities Roster | 9 days | Project Manager |
| 7 | | Create and Review Business Process Workflow | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 8 | | Create and Review Business User Profiles | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 9 | | Review any Existing Business Use Cases | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 10 | | Create Glossary | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 13 | | Create and Review Define Phase Daily Task Schedule | 9 days | Project Manager |
| 14 | | Create and Review Kick-Off Meeting Agenda | 9 days | Project Manager |
| 15 | | **Conduct Kick-Off Meeting** | **1 day** | **Project Manager** |
| 16 | | Review Documents Created During Start Up Including Ground Rules | 6 hrs | Project Manager |
| 17 | | Deliver the Start Up Phase Documents into the CM Tool | 2 hrs | Project Manager |

Tasks: (7) Create and Review Business Process Workflow
(8) Create and Review Business User Profiles
(9) Review any existing Business Use Cases
(10) Create Glossary

Resources: Project Manager, Business Functional Lead, Executive Sponsor/Customer
Duration: 9 business days
Templates: 'TEMPLATE Business Process Workflow.doc'; 'TEMPLATE Business User Profiles.doc'; 'TEMPLATE Glossary'

The Business Process Workflow and Business User Profiles will be utilized during the Define Phase. Use Cases, if already available, may be used in place of the Business Process Workflow and Business User Profiles documents. The Business Process Workflow is the documentation of the high-level flow of tasks performed by the business area. At a minimum, describe the specific business area work processes that will be affected by the current Release. The Business User Profiles are high-level definitions of how each type of user interacts with the system. The definition should include the title, permissions, privileges and capabilities of each user profile/role.

For existing systems in which Use Cases were utilized to document the system, review the Use Cases and update them as necessary to ensure they accurately reflect the Business Process Workflow and Business User Profiles as they currently exist in the system.

In creating the Glossary, list any terms and acronyms that are specific to the system to ensure that all RAD Project Team members in all phases of the project utilize and understand the same verbiage. This document will be updated as necessary during the subsequent phases to include any new terms or acronyms created.

## Step 5:  Prepare for the Kick-Off Meeting and the Start of the Define Phase

| | | Task Name | Duration | Resource Names |
|---|---|---|---|---|
| 2 | | Start Up Phase | 10 days | |
| 3 | ✓ | Prioritize Project Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 4 | ✓ | Create and Review Release Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 5 | ✓ | Create and Review RAD Project Plan | 9 days | Project Manager |
| 6 | ✓ | Create and Review RAD Project Team Roles and Responsibilities Roster | 9 days | Project Manager |
| 7 | ✓ | Create and Review Business Process Workflow | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 8 | ✓ | Create and Review Business User Profiles | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 9 | ✓ | Review any Existing Business Use Cases | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 10 | ✓ | Create Glossary | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 11 | | Create and Review Meeting Resources Checklist | 9 days | Project Manager |
| 12 | | Perform Action Items in Meeting Resources Checklist | 9 days | Project Manager |
| 16 | | Review Documents Created During Start Up Including Ground Rules | 6 hrs | Project Manager |
| 17 | | Deliver the Start Up Phase Documents into the CM Tool | 2 hrs | Project Manager |

Tasks:  (11) Create and Review Meeting Resources Checklist
(12) Perform Action Items in Meeting Resources Checklist

Resource: Project Manager
Duration: 9 business days
Template: 'TEMPLATE Meeting Resources Checklist.doc'

Use this document to list all resources needed for the Kick-Off and each Management Review meeting as well as the Define Phase, and check the items off the list as they are acquired.  Include all necessary items from lap-tops and projectors to pens and post-its.  Also list the conference and break-out rooms that will be used during the Define Phase.  Use this document to remember to reserve the rooms for all of these events.

Suggestions:

Obtain laptop(s) for the Scribe(s)
Obtain a projector(s) for displaying documents for group viewing
Obtain flipcharts (at least 2) with "Post-It" style paper
Obtain a White Board (with photocopy capability if available)
Arrange the tables in a horse-shoe shape to enable all participants to see each other

## Step 6:  Create and Review the Define Phase Daily Task Schedule

| | | Task Name | Duration | Resource Names |
|---|---|---|---|---|
| 2 | | Start Up Phase | 10 days | |
| 3 | ✓ | Prioritize Project Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 4 | ✓ | Create and Review Release Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 5 | ✓ | Create and Review RAD Project Plan | 9 days | Project Manager |
| 6 | ✓ | Create and Review RAD Project Team Roles and Responsibilities Roster | 9 days | Project Manager |
| 7 | ✓ | Create and Review Business Process Workflow | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 8 | ✓ | Create and Review Business User Profiles | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 9 | ✓ | Review any Existing Business Use Cases | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 10 | ✓ | Create Glossary | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 11 | ✓ | Create and Review Meeting Resources Checklist | 9 days | Project Manager |
| 12 | ✓ | Perform Action Items in Meeting Resources Checklist | 9 days | Project Manager |
| 13 | | Create and Review Define Phase Daily Task Schedule | 9 days | Project Manager |
| 16 | | Review Documents Created During Start Up Including Ground Rules | 6 hrs | Project Manager |
| 17 | | Deliver the Start Up Phase Documents into the CM Tool | 2 hrs | Project Manager |

Task: (13) Create and Review the Define Phase Daily Task Schedule

Resource: Project Manager
Duration: 9 business days
Template: 'TEMPLATE Define Phase Daily Task Schedule.doc'

This schedule helps to identify activities that occur on each day of the Define Phase and ensure that the Define Team stays on schedule. FMS recommends that you review and create the Detailed Release Requirements for ALL of the Release Requirements, and then determine the LOE for all the Release Requirements, and then move into writing the Business Rules for the final Release Requirements agreed upon after determining if any of the Release Requirements will have to be dropped due to the LOE involved. Update the dates to reflect the dates in the RAD Project Plan for the Release, and tailor the schedule to suit the project. The Define Phase should begin between 8:30 a.m. or 9:00 a.m. each day and end at approximately 2:00 p.m. This schedule provides Define Team members with the time outside of the Define Phase meetings that they will need to complete Release-related tasks and assignments. More specific project information such as the Release Requirements may be added to the schedule if desired. This schedule will likely be revised during the Define Phase but will serve as a starting point for the Define Phase.

**Step 7: Create and Review Kick-Off Meeting Agenda**

| | | Task Name | Duration | Resource Names |
|---|---|---|---|---|
| 2 | | **Start Up Phase** | **10 days** | |
| 3 | ✓ | Prioritize Project Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 4 | ✓ | Create and Review Release Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 5 | ✓ | Create and Review RAD Project Plan | 9 days | Project Manager |
| 6 | ✓ | Create and Review RAD Project Team Roles and Responsibilities Roster | 9 days | Project Manager |
| 7 | ✓ | Create and Review Business Process Workflow | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 8 | ✓ | Create and Review Business User Profiles | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 9 | ✓ | Review any Existing Business Use Cases | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 10 | ✓ | Create Glossary | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 11 | ✓ | Create and Review Meeting Resources Checklist | 9 days | Project Manager |
| 12 | ✓ | Perform Action Items in Meeting Resources Checklist | 9 days | Project Manager |
| 13 | ✓ | Create and Review Define Phase Daily Task Schedule | 9 days | Project Manager |
| 14 | | Create and Review Kick-Off Meeting Agenda | 9 days | Project Manager |
| 17 | | Deliver the Start Up Phase Documents into the CM Tool | 2 hrs | Project Manager |

Task: (14) Create and Review Kick-Off Meeting Agenda

Resource: Project Manager
Duration: 9 business days
Template: 'TEMPLATE Kick-Off Meeting Agenda.doc'

Create and distribute the Kick-Off Meeting Agenda using 'TEMPLATE Kick-Off Meeting Agenda.doc' and compile the documents to be reviewed at the meeting. The documents should include all of the documents previously discussed, as well as the Ground Rules document which outlines the behavior expected of the Define Team during the Define Phase. Additional ground rules may be added to the ground rules listed in the example document if necessary or desired.

**Step 8: Conduct Kick-Off Meeting**

| | Indicators | Task Name | Duration | Resource Names |
|---|---|---|---|---|
| 2 | | **Start Up Phase** | **10 days** | |
| 3 | ✓ | Prioritize Project Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 4 | ✓ | Create and Review Release Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 5 | ✓ | Create and Review RAD Project Plan | 9 days | Project Manager |
| 6 | ✓ | Create and Review RAD Project Team Roles and Responsibilities Roster | 9 days | Project Manager |
| 7 | ✓ | Create and Review Business Process Workflow | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 8 | ✓ | Create and Review Business User Profiles | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 9 | ✓ | Review any Existing Business Use Cases | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 10 | ✓ | Create Glossary | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 11 | ✓ | Create and Review Meeting Resources Checklist | 9 days | Project Manager |
| 12 | ✓ | Perform Action Items in Meeting Resources Checklist | 9 days | Project Manager |
| 13 | ✓ | Create and Review Define Phase Daily Task Schedule | 9 days | Project Manager |
| 14 | ✓ | Create and Review Kick-Off Meeting Agenda | 9 days | Project Manager |
| 15 | | **Conduct Kick-Off Meeting** | **1 day** | **Project Manager** |
| 16 | | Review Documents Created During Start Up Including Ground Rules | 6 hrs | Project Manager |

Tasks: (15) Conduct Kick-Off Meeting
(16) Review Documents Created During Start Up Including Ground Rules

Resource: Project Manager
Duration: 1 business day
Template: 'TEMPLATE Ground Rules.doc'

The Kick-Off Meeting is the official announcement of the end of the Start Up Phase and the beginning of the Define Phase. Ideally, the entire RAD Project Team, including the Executive Sponsor/Customer, will be present at the Kick-Off Meeting. All documentation created during Start Up shall be reviewed, with particular emphasis placed on the review of the Release Requirements and the Ground Rules to ensure that all participants are aware of the intended scope of the Release, and the conduct expected of the Define Team members. This meeting also serves as the Business Owner's "go ahead" to proceed to the Define Phase. If possible, have the Executive Sponsor/Customer, Business Functional Lead and Technical Lead sign off on the Release Requirements. At a minimum, e-mail these individuals after the meeting with a read receipt, attaching the Release Requirements document to ensure they have each received a copy of the agreed upon Release Requirements.

### Step 9: Deliver the Start Up Phase Documents into the CM Tool

| | | Task Name | Duration | Resource Names |
|---|---|---|---|---|
| 2 | | **Start Up Phase** | **10 days** | |
| 3 | ✓ | Prioritize Project Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 4 | ✓ | Create and Review Release Requirements | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 5 | ✓ | Create and Review RAD Project Plan | 9 days | Project Manager |
| 6 | ✓ | Create and Review RAD Project Team Roles and Responsibilities Roster | 9 days | Project Manager |
| 7 | ✓ | Create and Review Business Process Workflow | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 8 | ✓ | Create and Review Business User Profiles | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 9 | ✓ | Review any Existing Business Use Cases | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 10 | ✓ | Create Glossary | 9 days | Project Manager,Business Functional Lead,Executive Sponsor |
| 11 | ✓ | Create and Review Meeting Resources Checklist | 9 days | Project Manager |
| 12 | ✓ | Perform Action Items in Meeting Resources Checklist | 9 days | Project Manager |
| 13 | ✓ | Create and Review Define Phase Daily Task Schedule | 9 days | Project Manager |
| 14 | ✓ | Create and Review Kick-Off Meeting Agenda | 9 days | Project Manager |
| 15 | | **Conduct Kick-Off Meeting** | **1 day** | **Project Manager** |
| 16 | ✓ | Review Documents Created During Start Up Including Ground Rules | 6 hrs | Project Manager |
| 17 | | Deliver the Start Up Phase Documents into the CM Tool | 2 hrs | Project Manager |

Task: (17) Deliver the Start Up Phase Documents into the CM Tool

Resource: Project Manager
Duration: 2 hours
Template: N/A

The final Start Up Phase Documents should be entered into the CM tool by the Project Manager to ensure no changes are made to the documents the Management Team approved.

### *Phase II — Define*

**Overview**

The primary purpose of the Define Phase is for the Define Team members to assess the Release Requirements to determine, as accurately as possible, the LOE necessary for each Release Requirement to ensure that the Release Requirements agreed upon during Start Up are truly accomplishable within the FMS RAD Time Box, and then to define, at a granular level, the Business Rules and edits and errors for each of the Release Requirements. The members of the Define Team must be commit to attend every day of the Define Phase; however, subject matter experts whose input is only needed for certain Release Requirements may participate in an 'on-call' status and be available when the Define Team needs their expertise.

Based on the LOE assessment, the Define Team may decide to drop some of the previously agreed upon Release Requirements if it is determined that it is unlikely the Release Requirements can be accomplished within the FMS RAD Time Box. Conversely, if it is determined that the LOE assessment done during Start Up was overly conservative, additional requirements may be taken from the Project Requirements document and added to the Release Requirements document.

By the end of the Define Phase, the Business Rules portion of the Business Rules and Program Specifications (BRPS) document will be complete. This document identifies the Release Requirements at a very detailed level. The Define Team is responsible for capturing exactly what each object on a webpage does. For example, the BRPS will indicate which items on a page must be validated, and whether the Save button will keep the user on the current page or send the user to a different page. If the Release focuses on a more technical functionality, one with little user interface, the Business Rules should clearly define the input and the expected results for the functionality. The application page where the functionality is triggered can be considered the reference point with which the Business Rules are listed. The language is informal. No highly technical information is defined and the Define Team should avoid designing the application. Other deliverables from the Define Phase include the Navigational Flow Diagram, which illustrates how the application will be structured, a prototype that provides the layout of each page, and a Web Page Inventory that lists each page of the prototype.

The Parking Lot helps the Define Team to remain focused on the requirements for the current Release by providing a means for capturing information and ideas about functionality and requirements that will not be included in the current Release. The Parking Lot is also used to house Release Requirements that are determined to be outside the LOE until the Post Deploy Phase when they will be moved from the Parking Lot back to the Project Requirements document so that they can be considered for development during future Releases. The Parking Lot is a powerful tool that the Define Team relies upon heavily; it allows the Define Team participants to feel validated and recognized and saves valuable time by limiting the rehashing of items previously discussed.

The Minutes should be used to memorialize the Define Team members present, and any key decisions made for each day of the Define Phase. The Minutes can also be used to track assignments made to Define Team members. However, it may be easier to track assignments in a separate document if the assignment list becomes lengthy.

***A Step-by-Step Guide to Define***

**Step 1: Week One of the Define Phase**

| | | Task Name | Duration | Resource Names |
|---|---|---|---|---|
| 18 | | Define Phase | 10 days | |
| 19 | | Introductions, Logistics and Start Up Phase Recap | 4 hrs | Define Team |
| 20 | | Create and Maintain Minutes and Glossary | 5 days | Define Team |
| 21 | | Create Detailed Release Requirements | 5 days | Define Team |
| 22 | | Create a Prototype | 5 days | Define Team |
| 23 | | Create a Web Page Inventory | 5 days | Define Team |
| 24 | | Create User Roles and Access Definitions | 5 days | Define Team |
| 25 | | Create a Navigational Flow Diagram | 5 days | Define Team |
| 26 | | Create and Review Parking Lot | 9 days | Define Team |

A. Tasks: (19) Introductions, Logistics and Start Up Phase Recap
(20) Create and Maintain Minutes and Glossary

Resource: Define Team
Duration: 5 business days
Templates: 'TEMPLATE Minutes.doc'; 'TEMPLATE Glossary.doc'

On the first day of Define, introduce the Define Team participants to each other if they are not already familiar with each other, and advise the team of the locations of the cafeteria and rest rooms. Briefly review the Start Up documents to refresh everyone's memory.

The scribe maintains the minutes, which should capture the attendees and key decisions made by the Define Team during each day of the Define Phase. Accurate minutes are critical during the first part of the Define Phase in order to maintain a record of the decisions made by the Team so that these decisions can be referred to if Define Team members begin to rehash issues that have been previously resolved.

Assignments can be included in the Minutes document unless a high number of assignments are created, in which case it may be easier to track the assignments in a separate document. Include the due date and the person assigned to a task.

Continue to add new terms and acronyms to the Glossary as they are created.

B. Task: (21) Create Detailed Release Requirements

Resource: Define Team
Duration: 5 business days
Template: 'TEMPLATE Detailed Release Requirements.doc'

The Detailed Release Requirements document is created during the first week of the Define Phase capture the Define Team's analysis and break down of the Release Requirements to a granular level. Once the Release Requirements are further defined in the Detailed Release Requirements document, the Define Team is able to determine the LOE for each Release Requirement. The Technical Lead is crucial in determining the LOE of each Release Requirement. Upon establishing the LOE for each requirement, the Define Team determines which requirements will be included in the Release, and which requirements are beyond the scope of the Release. If a Release

Requirement is determined to be beyond the scope, it is placed on the Parking Lot. In the second week of Define, the Define Team will further define all the remaining Release Requirements in the BRPS document (or alternatively, in the Use Cases.)

An elementary method for determining the scope with respect to the LOE is for the scribe to record the total developer work-hours that the Technical Lead has agreed to commit to the Release, and subtract the number of work-hours required for each Release Requirement from that total, keeping a running tally of the remaining work-hours. The scope of the Release is defined when approximately 85-90% of the total available work-hours are spent.

The scribe is responsible for maintaining the Detailed Release Requirements document during the Define Phase. It is important that the Detailed Release Requirements are clearly defined and agreed upon by the Define Team. It is a good practice for the Define Team to review this document at the beginning of each day of the first week of the Define Phase to insure that the Detailed Release Requirements were captured accurately and to display updates as they are made.

C. Tasks: (22) Create a Prototype
(23) Create a Web Page Inventory

Resource: Define Team
Duration: 5 business days
Template: ‘TEMPLATE Web Page Inventory.doc’

The Prototype provides a graphical depiction of the layout for each new and existing web page affected by a Release Requirement. The prototype can be done by hand on paper or captured in an electronic format (Visio, PowerPoint, DreamWeaver, etc.) The Prototype is used as a visual guide when creating the Detailed Release Requirements and the Business Rules. The Web Page Inventory is a tool for naming or numbering (or both) each web page to make each page uniquely identified and individually distinguishable, as well as to provide a method for tracking the pages created during the Define Phase.

D. Task: (24) Create User Roles and Access Definitions

Resource: Define Team
Duration: 5 business days
Template: ‘TEMPLATE User Roles and Access Definitions.doc’

This document defines the specific system functionality a User Role can perform along with a user’s Data Access Rights. If statuses are used in the system, they can be defined here as well.

E. Task: (25) Create a Navigational Flow Diagram

Resource: Define Team
Duration: 5 business days
Template: ‘TEMPLATE Navigational Flow Diagram.doc’

The Navigational Flow Diagram illustrates graphically the flow of each page of the system and the functionalities that can be performed on each page. It also indicates the navigational flow (paths) between the system pages. The Navigation Flow Diagram does not differentiate the User Roles.

F. Task: (26) Create and Review Parking Lot

Resource: Define Team
Duration: 9 business days (the Parking Lot is also updated at the conclusion of the Release)
Templates: ‘TEMPLATE Parking Lot.doc’

All potential requirements that the Define Team identifies, but determines will not be included in the current Release are placed in the Parking Lot document. These potential requirements should be clearly and thoroughly defined by the Define Team. Also, if the Define Team determines that a Release Requirement is beyond the scope of this Release, the Release Requirement is listed on the Parking Lot. The scribe should ensure that new Parking Lot items are captured accurately and the source and date are recorded. All requirements will be maintained in the Parking Lot until the Post Deploy Phase.

**Step 2: Create the Business Rules**

| | | Task Name | Duration | Resource Names |
|---|---|---|---|---|
| 18 | | **Define Phase** | **10 days** | |
| 19 | ✓ | Introductions, Logistics and Start Up Phase Recap | 4 hrs | Define Team |
| 20 | ✓ | Create and Maintain Minutes and Glossary | 5 days | Define Team |
| 21 | ✓ | Create Detailed Release Requirements | 5 days | Define Team |
| 22 | ✓ | Create a Prototype | 5 days | Define Team |
| 23 | ✓ | Create a Web Page Inventory | 5 days | Define Team |
| 24 | ✓ | Create User Roles and Access Definitions | 5 days | Define Team |
| 25 | ✓ | Create a Navigational Flow Diagram | 5 days | Define Team |
| 26 | ✓ | Create and Review Parking Lot | 9 days | Define Team |
| 27 | | **Create Business Rules** | **4 days** | **Define Team** |
| 28 | | Write the Business Rules Portion of the Business Rules and Program Specifications (BRPS) | 4 days | |
| 29 | | OR Update Existing Business Use Cases | 4 days | |
| 31 | | Management Review | 3 hrs | Executive Sponsor,Define Team |
| 32 | | Deliver the Define Phase Documents into the CM Tool | 1 hr | Project Manager |

Tasks: (27) Create Business Rules
(28) Write the Business Rules Portion of the Business Rules and Program Specifications Document or
(29) Update Existing Business Use Cases

Resource: Define Team
Duration: 4 business days
Template: 'TEMPLATE Business Rules and Program Specifications.doc'

The Define Team is responsible for listing exactly what each object on a system page does and its state. This is done by creating Business Rules, which further define the Detailed Release Requirements. FMS recommends the use of the Business Rules and Program Specifications format for capturing the business requirements, however, Business Use Cases may be used if preferred. Regardless of the format used, the Business Rules must cover every user role or other condition of the system. Each Business Rule must be assigned a number (Ref. #), and this reference number must not be changed or reused so that the change history can be maintained properly. The description of the Business Rule is entered in the 'Business Rule' column. The type of object (e.g., button, radio button, text box) should be identified in the 'Field Type' column. Please refer to the 'Guide to Writing Business Rules' in Appendix A for specific Business Rules that should be defined for each object.

The Business Rules should also list and provide reference numbers for all of the edit and error messages for a system in the 'System Message' column. Each edit and error message must be assigned a reference number, and this reference number must not be changed or reused. The messages are associated with the Business Rules via the reference number. For example, to indicate that the error message 'Please enter a Phone Number' will be displayed when the Save button is selected but the user did not enter a phone number, the reference number of that error message is entered in the System Message column of the BRPS for the Save Button's Business Rule. Please refer to Appendix A for guidance on writing Business Rules.

The Change History is used starting with the second Release. The Change History can be cleared after each Release, because a document history will be maintained in a CM tool.

The database and other technical information are entered into this document by the developers during the Design Phase.

**Step 3: Review the Define Phase Documents with the Define Team**

| | i | Task Name | Duration | Resource Names |
|---|---|---|---|---|
| 18 | | **Define Phase** | **10 days** | |
| 19 | ✓ | Introductions, Logistics and Start Up Phase Recap | 4 hrs | Define Team |
| 20 | ✓ | Create and Maintain Minutes and Glossary | 5 days | Define Team |
| 21 | ✓ | Create Detailed Release Requirements | 5 days | Define Team |
| 22 | ✓ | Create a Prototype | 5 days | Define Team |
| 23 | ✓ | Create a Web Page Inventory | 5 days | Define Team |
| 24 | ✓ | Create User Roles and Access Definitions | 5 days | Define Team |
| 25 | ✓ | Create a Navigational Flow Diagram | 5 days | Define Team |
| 26 | ✓ | Create and Review Parking Lot | 9 days | Define Team |
| 27 | ✓ | **Create Business Rules** | **4 days** | **Define Team** |
| 28 | ✓ | Write the Business Rules Portion of the Business Rules and Program Specifications (BRPS) | 4 days | |
| 29 | ✓ | OR Update Existing Business Use Cases | 4 days | |
| 30 | | Review the Define Phase Documents with the Define Team | 4 hrs | Define Team |
| 32 | | Deliver the Define Phase Documents into the CM Tool | 1 hr | Project Manager |

Task: (30) Review the Define Phase Documents with the Define Team

Resource: Define Team
Duration: 4 hours
Template: N/A

The Define Team collaboratively reviews all of the documentation created during the Define Phase and updates the documentation, as necessary, prior to the presentation of the Prototype and documentation to management.

**Step 4: Review the Define Phase Documents with the Management Team**

| | i | Task Name | Duration | Resource Names |
|---|---|---|---|---|
| 18 | | **Define Phase** | **10 days** | |
| 19 | ✓ | Introductions, Logistics and Start Up Phase Recap | 4 hrs | Define Team |
| 20 | ✓ | Create and Maintain Minutes and Glossary | 5 days | Define Team |
| 21 | ✓ | Create Detailed Release Requirements | 5 days | Define Team |
| 22 | ✓ | Create a Prototype | 5 days | Define Team |
| 23 | ✓ | Create a Web Page Inventory | 5 days | Define Team |
| 24 | ✓ | Create User Roles and Access Definitions | 5 days | Define Team |
| 25 | ✓ | Create a Navigational Flow Diagram | 5 days | Define Team |
| 26 | ✓ | Create and Review Parking Lot | 9 days | Define Team |
| 27 | ✓ | **Create Business Rules** | **4 days** | **Define Team** |
| 28 | ✓ | Write the Business Rules Portion of the Business Rules and Program Specifications (BRPS) | 4 days | |
| 29 | ✓ | OR Update Existing Business Use Cases | 4 days | |
| 30 | ✓ | Review the Define Phase Documents with the Define Team | 4 hrs | Define Team |
| 31 | | Management Review | 3 hrs | Executive Sponsor,Define Team |

Task: (31) Management Review

Resource: Define Team, Executive Sponsor/Customer
Duration: 3 hours
Template: N/A

The Project Manager presents the Prototype and the documentation to the Management Team/Business Owners in order to gain approval to move from the Define Phase into the Design Phase.  This approval indicates the Business Owner's approval of the Prototype and scope of the Release.

**Step 5:  Deliver the Define Phase Documents into the CM Tool**

| | | Task Name | Duration | Resource Names |
|---|---|---|---|---|
| 18 | | **Define Phase** | **10 days** | |
| 19 | ✓ | Introductions, Logistics and Start Up Phase Recap | 4 hrs | Define Team |
| 20 | ✓ | Create and Maintain Minutes and Glossary | 5 days | Define Team |
| 21 | ✓ | Create Detailed Release Requirements | 5 days | Define Team |
| 22 | ✓ | Create a Prototype | 5 days | Define Team |
| 23 | ✓ | Create a Web Page Inventory | 5 days | Define Team |
| 24 | ✓ | Create User Roles and Access Definitions | 5 days | Define Team |
| 25 | ✓ | Create a Navigational Flow Diagram | 5 days | Define Team |
| 26 | ✓ | Create and Review Parking Lot | 9 days | Define Team |
| 27 | ✓ | **Create Business Rules** | **4 days** | **Define Team** |
| 28 | ✓ | Write the Business Rules Portion of the Business Rules and Program Specifications (BRPS) | 4 days | |
| 29 | ✓ | OR Update Existing Business Use Cases | 4 days | |
| 30 | ✓ | Review the Define Phase Documents with the Define Team | 4 hrs | Define Team |
| 31 | ✓ | Management Review | 3 hrs | Executive Sponsor,Define Team |
| 32 | | Deliver the Define Phase Documents into the CM Tool | 1 hr | Project Manager |

Task:    (32) Deliver the Define Phase Documents into the CM Tool

Resource:    Project Manager
Duration:    1 hour
Template:    N/A

The final Define Phase Documents should be entered into the CM tool by the Project Manager to ensure no changes are made to the documents the Management Team approved.

### *Phase VI — Post Deploy*

**Overview:**

The highlight of the Post Deploy Phase is to 'Go Live.' This is when the application goes into production and is ready for use. Other aspects of the Post Deploy Phase include assessing and resolving the challenges that occurred during the Release in order to avoid them in future Releases, taking note of anything that worked particularly well, and capturing this information in the Lessons Learned document. Also, this is the time to review the Parking Lot to determine whether the items listed in the Parking Lot will be incorporated into the Project Requirements or dropped. The final task of a FMS RAD Release is a celebration to recognize the RAD Project Team's effort in making the Release a success.

### *A Step-by-Step Guide to Post Deploy*

**Step 1: Go Live**

| | | Task Name | Duration | Resource Names |
|---|---|---|---|---|
| 54 | | **Post Deploy** | **4 days** | |
| 55 | | Go Live | 1 day | Technical Lead,Platform Lead,Configuration Management Lead,Project Manager |
| 57 | | Review the Parking Lot | 4 hrs | |
| 58 | | Compile and Review the Lessons Learned | 4 hrs | |
| 59 | | Deliver the Finalized Project Documents into the CM Tool | 1 day | Project Manager |
| 60 | | Celebrate! | 1 day | |

Task: (55) Go Live

Resources: Technical Lead, Platform Lead, Configuration Management Lead, Project Manager
Duration: 1 business day
Template: N/A

This is the implementation day for the Release. All of the resources should support the effort to ensure that the application code is delivered on time, the servers are ready, and the proper documents have been delivered and approved. During this task, all of the Leads should be available in order to resolve any issues as quickly as possible.

### Step 2:  Conduct the Release Evaluation Meeting

| | | Task Name | Duration | Resource Names |
|---|---|---|---|---|
| 54 | | **Post Deploy** | **4 days** | |
| 55 | ✓ | Go Live | 1 day | Technical Lead,Platform Lead,Configuration Management Lead,Project Manager |
| 56 | | **Conduct Release Evaluation Meeting** | **1 day** | **Project Manager,Define Team** |
| 57 | | Review the Parking Lot | 4 hrs | |
| 58 | | Compile and Review the Lessons Learned | 4 hrs | |
| | | Celebrate! | 1 day | |

Tasks: (56) Conduct Release Evaluation Meeting
(57) Review the Parking Lot
(58) Compile and Review the Lessons Learned

Resources: Project Manager, Define Team
Duration: 1 business day
Template: N/A

The meeting participants will determine the fate of the items listed on the Parking Lot.  Update the Parking Lot with one of the following decisions for each item:

Reject the item.  If it was a Release Requirement, update its status to Deleted on the Project Requirements and Parking Lot document.  (Do not reuse its Requirement Number.)

Add it to the Project Requirements document.  If it was a potential requirement, update the Project Requirements document to reflect the inclusion of the new requirement.

The meeting participants should discuss each Lessons Learned item and determine the actions necessary to resolve any issues in order to avoid and/or prepare for them in future Releases.  The FMS RAD Staff will incorporate the Lessons Learned into FMS RAD.

### Step 4:  Compile and Deliver the Finalized Project Documents into the CM Tool

| | | Task Name | Duration | Resource Names |
|---|---|---|---|---|
| 54 | | Post Deploy | 4 days | |
| 55 | ✓ | Go Live | 1 day | Technical Lead,Platform Lead,Configuration Management Lead,Project Manager |
| 56 | ✓ | Conduct Release Evaluation Meeting | 1 day | Project Manager,Define Team |
| 57 | ✓ | Review the Parking Lot | 4 hrs | |
| 58 | ✓ | Compile and Review the Lessons Learned | 4 hrs | |
| 59 | | Deliver the Finalized Project Documents into the CM Tool | 1 day | Project Manager |

Task:  (59) Deliver the Finalized Project Documents into the CM Tool

Resource: Project Manager
Duration: 1 business day
Template: N/A

The Project Manger is responsible for ensuring that the Project Documents produced during all of the Release Phases are in the CM repository. The documents should be considered to be finalized and can be base-lined for the Release.

### Step 5:  Celebrate!

| | | Task Name | Duration | Resource Names |
|---|---|---|---|---|
| 54 | | Post Deploy | 4 days | |
| 55 | ✓ | Go Live | 1 day | Technical Lead,Platform Lead,Configuration Management Lead,Project Manager |
| 56 | ✓ | Conduct Release Evaluation Meeting | 1 day | Project Manager,Define Team |
| 57 | ✓ | Review the Parking Lot | 4 hrs | |
| 58 | ✓ | Compile and Review the Lessons Learned | 4 hrs | |
| 59 | ✓ | Deliver the Finalized Project Documents into the CM Tool | 1 day | Project Manager |
| 60 | | Celebrate! | 1 day | |

Task:  (60) Celebrate!

Resource: Everybody
Duration: 1 business day
Template: N/A

Don't forget to celebrate your success! The FMS RAD methodology requires an intense focus for a Release to be successful, and it is important to take the time to acknowledge the effort of everyone involved in the Release.

# Appendix A:  Guide to Writing Business Rules

The following information lists items that should be considered when writing Business Rules for objects on an application page.  Not all items will be addressed for each object.  Be sure to address each user role, status, or other variable that can affect the Business Rules for each item.

The Define Team is responsible for listing exactly what each object on a system page does and its state.  This is done by creating Business Rules, which further define the Detailed Business Requirements.  FMS recommends the use of the Business Rules and Program Specifications format for capturing the business requirements, however, Business Use Cases may be used if preferred.  Regardless of the format used, the Business Rules must cover every user role or other condition of the system.  Each Business Rule must be assigned a number (Ref. #), and this reference number must not be changed or reused so that the change history can be maintained properly.  The description of the Business Rule is entered in the 'Business Rule' column.  The type of object (e.g., button, radio button, text box) should be identified in the 'Field Type' column.  The 'Object Name' is the label for the object.  Please refer to the 'Object Business Rules' list below for specific Business Rules that should be defined for each object

The Business Rules should also list and provide reference numbers for all of the edit and error messages for a system in the 'System Message' column.  Each edit and error message must be assigned a reference number, and this reference number must not be changed or reused.  The messages are associated with the Business Rules via the reference number.  For example, to indicate that the error message 'Please enter a Phone Number' will be displayed when the Save button is selected but the user did not enter a phone number, the reference number of that error message is entered in the System Message column for the Business Rule for the Save button.

The database and other technical information are entered into this document by the developers during the Design Phase.

**Object Business Rules:**
(Be sure to define the following Business Rules with respect to each user role, status, or other variables that can affect the Business Rules for each item).

| Object Name | Field Type | Business Rules |
|---|---|---|
| **Buttons** | | |
| <Enter Object Label><br>(e.g., 'Save') | Buttons | Default Properties:  Visible, Enabled |
| | | Events:  Describe what happens when a Button is clicked |
| | | Validations:  List Validation, include corresponding 'System Message' number |
| **Drop Down List** | | |
| <Enter Object Label><br>(e.g., 'Color') | | Calculated Values:  Indicate any calculated values |
| | | Data Groupings:  Provide data groupings including columns that will have subtotals and/or totals |
| | | Default Properties:  Enabled, Visible |
| | | Default Value:  Indicate the Default Value |
| | | Events:  Describe what happens when a list item is selected |
| | | Required Field:  Indicate if it is a required value |
| | | Sort Order:  Provide sort order |

| Object Name | Field Type | Business Rules |
|---|---|---|
| **Header Menu Bar** | | |
| Header Menu Bar: | N/A | Header Bar Items: List the Header Bar Items in order of appearance |
| | | Optional: Define the Header Menu Bar Items globally if they occur on more than one page |
| <Enter Object Label> (e.g., ‘Logoff’) | Header Bar Item | Events: Describe what happens when a Header Bar Item is selected |
| **Navigation Bar** | | |
| Navigation Bar | N/A | Navigation Bar Items: List the Navigation Bar Items in order of appearance |
| | | Optional: Define the Navigation Bar Items globally if they occur on more than one page |
| <Enter Object Label> (e.g., ‘About Us’) | Navigation Bar Item | Events: Describe what happens when a Navigation Bar Item is selected |
| **Page Description** | | |
| Page Description | N/A | Provide a high-level objective for the page as the first Business Rule and address User Roles. |
| **Radio Buttons** | | |
| <Enter Object Label> (e.g., ‘Color’) | Radio Button Group | Default Selection: Identify whether one of the buttons is selected by default |
| | | Required Values: Indicate if it is a required value |
| <Enter Object Label> (e.g., ‘Blue’) | Radio Button | Default Properties: Visible, Enabled |
| | | Events: Describe what happens when a radio button is selected |
| **Selection List or Tables** | | |
| <Enter Object Label> (e.g., ‘Orders’) | Selection List or Tables | Column Headers: List Column Headers in order of appearance |
| | | Data Groupings: Provide data groupings including columns that will have subtotals and/or totals |
| | | Default Properties: Enabled, Visible |
| | | Multiple Selections: Indicate if the user can select multiple list items or only one at a time. |
| | | Scroll Bars: Indicate if a scroll bar will be used, and if so, indicate how many rows should be displayed prior to scroll bar appearing. |
| | | Sort Order: Provide sort order |
| <Enter Object Label> (e.g., ‘Date’) | Column Header | Checkboxes: If Checkboxes are a column header<br>• Display message when mouse is over the checkbox.<br>• If checked, all of the checkboxes in the column are checked.<br>• If unchecked, all of the checkboxes in the column are unchecked. |
| | | Format Requirements: Indicate if font is bold, italics, underlined, left-justified etc. |
| <Enter Object Label> (e.g., ‘Date’) | Column Header and Link | Purpose: Indicates a column that can be resorted |
| | | Sort Order: Provide sort order |

| Object Name | Field Type | Business Rules |
|---|---|---|
| <Enter Column Header Label> (e.g., 'Date') | Column Data | Calculated Values: Indicate any calculated values. |
| | | Events: Describe what happens when a List or Table Item is selected |
| | | Format Requirements<br>• Indicate the data format for each column. Example: first name + mi + last name + suffix.<br>• Indicate if font is bold, italics, underlined, left-justified etc. |
| **Static Text** | | |
| <Enter Object Label> (e.g., 'Name') | Static Text | Default Properties: Visible |
| | | Format Requirements: Indicate if font is bold, italics, underlined, left-justified etc. |
| **Tabs** | | |
| Tab Header Group | N/A | Tab Headers: List Headers in order of appearance |
| <Enter Object Label> (e.g., 'Personalize') | Tab Header | Default properties: Enabled, Visible |
| | | Events: Describe what happens when tab is selected |
| **Text Box** | | |
| <Enter Object Label> (e.g., 'Name') | Text Box | Default properties: Enabled, Visible |
| | | Events: Describe what happens when a data is entered into a Text Box. |
| | | Format Requirements: Indicate if font is bold, italics, underlined, left-justified etc. |
| | | Redisplay Data: Indicate, for example, to add four leading zeroes to the value entered. |
| | | Required Values: Indicate if it is a required value |
| | | Validations (if performed as user leaves the text box): List Validation, include corresponding 'System Message' number |
| | | Value Lengths: Provide the maximum and minimum value lengths |
| | | Width: Provide the width of the Text Box |