OPS Roadmap / Storyboard

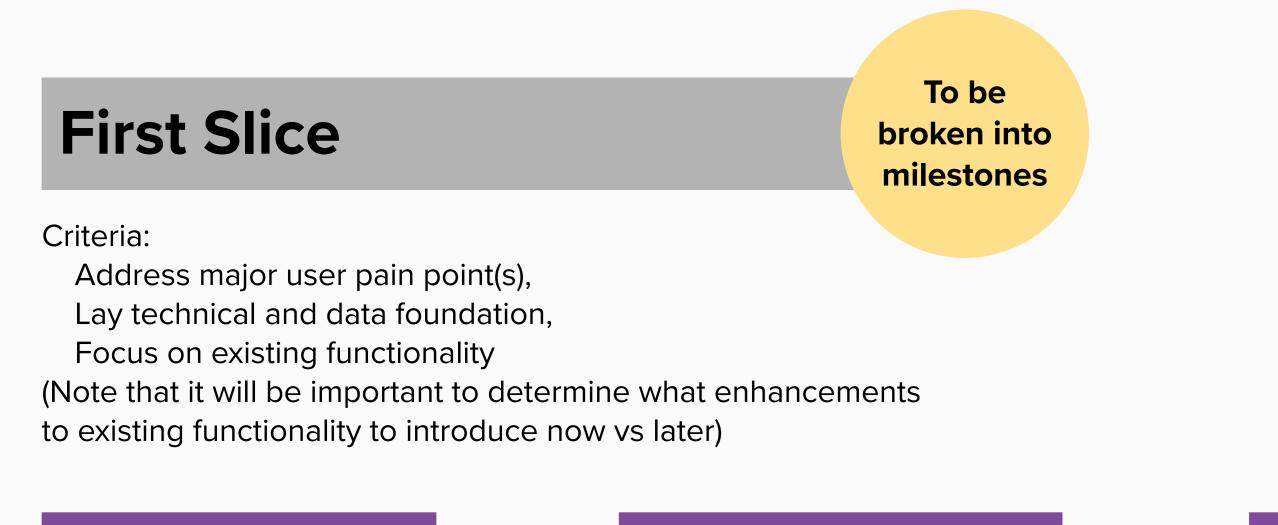
Last updated: Jan 2022

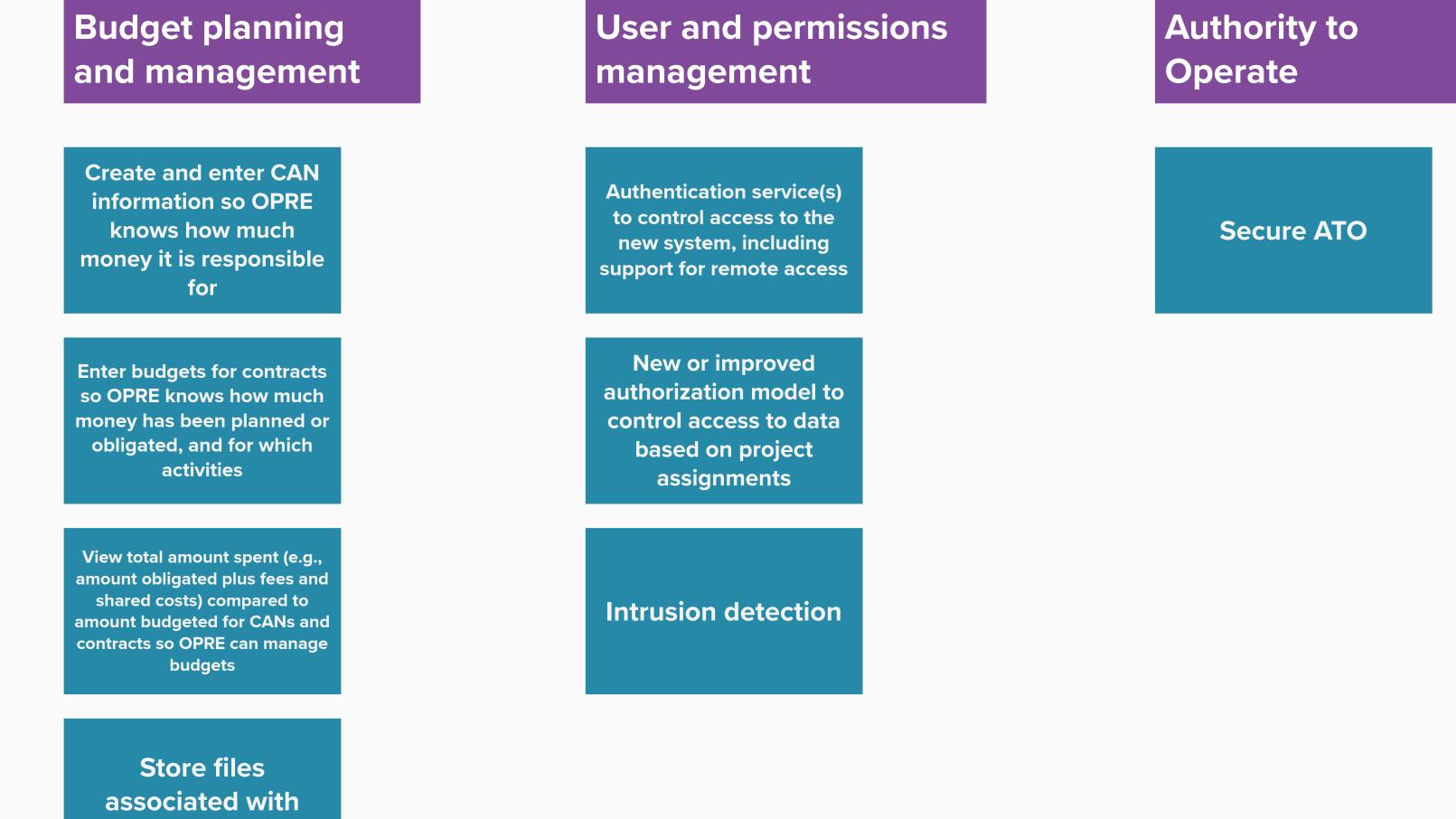
OPS Vision Statement

OPS (OPRE's Portfolio management System) will empower managers and staff with the visibility they need into OPRE's research, evaluation, and data activities, as well as streamline budget and administrative tasks. With this system, it will be easy for OPRE to plan and manage projects so they can spend less time managing the work and more time building evidence to improve the lives of children and families.

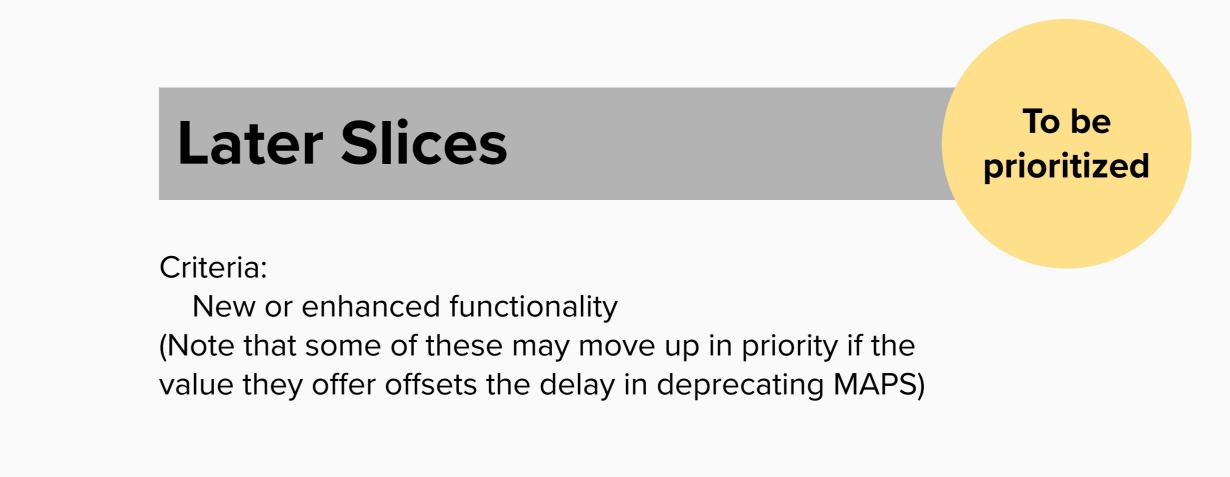
How will we know we made things better?

As we design and build OPS, we will seek to have the following impact: OPRE has a single source of truth about projects that has relevant, accurate data that any staff can easily access Budget and administrative tasks can be completed quickly, easily, and independently The system can be updated and modified more efficiently and with less risk.





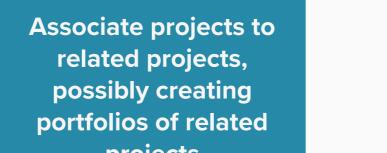
Next Slices	To be	
Criteria: Additional functionality needed (Note that for each slice it will be i what enhancements to introduce	important to determine	
Budget planning and management	Procurement management	Invoice management
Allocate fees and shared costs that also draw down from the budget	Enter planned procurement actions	View invoiced spend against budgets
Support IAAs	Request initiation of requisitions and modifications	Enter invoice information
Support assisted acquisitions	Track procurement milestones	Store invoice- related files
Support add'l agreement types, including Grants, Direct Obligations, IDDAs, etc.	Support direct contracts and assisted acquisitions	Possibly automat approval workflow including automat emails





Jdv tvpe.	View and manage staff assignments
-----------	--------------------------------------



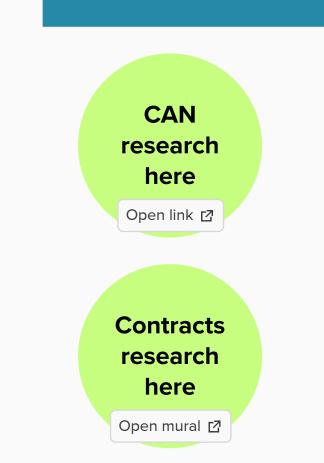


Create and enter information, in description, st population, pro project tea









First Slice Storyboard

User Stories

Next step:

Break into

milestones

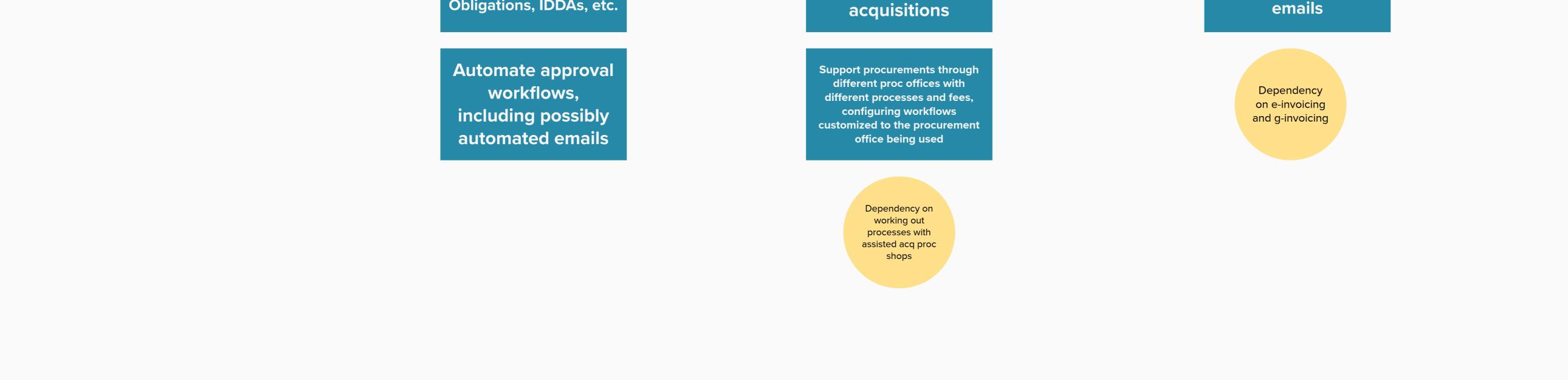
To do:

Incorporate

user needs around Data Sheets reporting

Criteria: Address major user pain point(s), Lay technical and data foundation, Focus on existing functionality

contracts

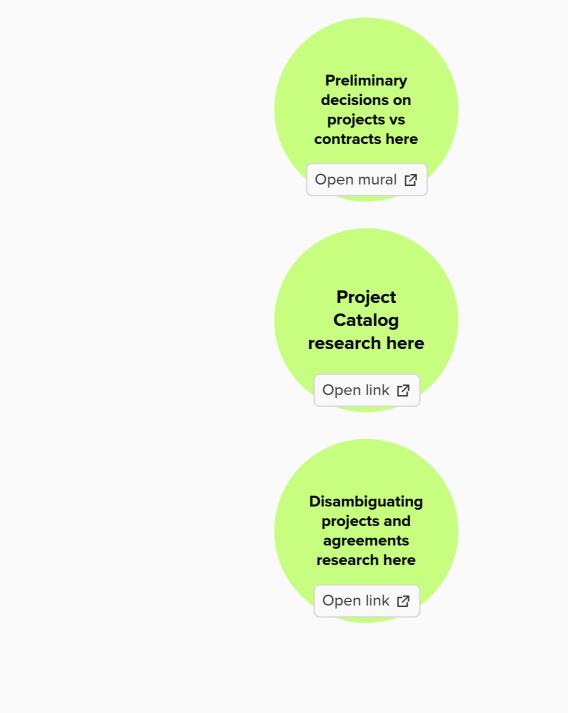


Budget planning and management

Navigation

Home page Navigation





Create spending

contract with proposed /

plans

Contracts research

here

Open mural 🗗

Import or upload

data in bulk, e.g.,

or CSVs

from spreadshee

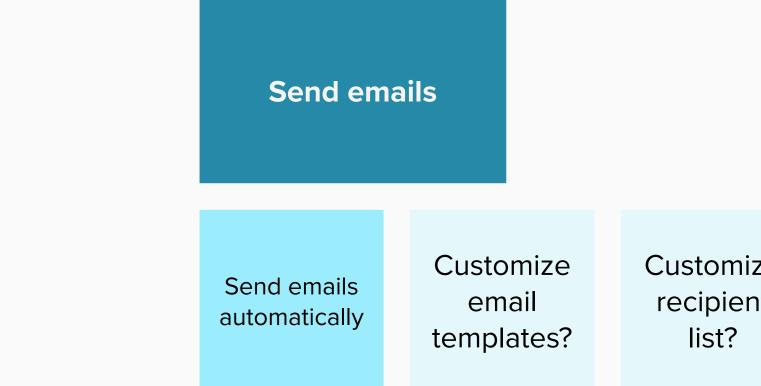


agreements

mods

Downloaded or exported data optimized for common workflow such as syncing data or matchin records with external systems,

esponding to data calls, providing lata to Congress (Data Sheets), or compiling other regular reports



Security / privacy / governance best practices (e.g., change

General things

As a system admin, I need to indicate who should be allowed to access the siteAs a user, I need a convenient way to access the systemAs a user, I need a convenient way to access the systemAs a user, I need a convenient way to access the systemAs a user, I need a convenient way to access the systemAs a user, I need a convenient way to access the systemAs a user, I need a convenient way to access the systemAs a user, I need a convenient way to access the systemAs a user, I need a convenient way to access the systemAs a user, I need a convenient way to access the systemAs a user, I need a convenient way to access the systemAs a user, I need a convenient way to access the systemAs a user, I need a convenient way to access the systemAs a user, I need a convenient way to access the systemAs a user, I need a convenient way to access the systemAs a user, I need a convenient way to access the systemAs a user, I need a the systemAs a user, I need a the systemAs a user, I need to track who is logging in, when, and for how long so that?As a user, I want to be able to tell what I can understand things I need most this site	As a budget officer, I need to input CAN and bus o on	As a project lead, I need to track what contracts we're planning to award or have awarded so that we don't over- or under-spendAs a project lead, COR, or budget officer, I need to view officer, I need to view information about a responsible forAs a project lead, COR, cAN lead, manager, or budget officer, I need to see budget officer, I need to see

CAN research

here

Open link 🗗

Edit a CAN View a CAN

Understand what

money OPRE is responsible for

Create a

First Slice																	
Budget Mgmt: Spending Plans & ATO: Basic end-to-end workflow that includes	Add new users	Create user groups	Log in with PIV card	Log in with 2FA	Same / similar static page for all users	Create one CAN at a time (CAN details page)	Edit one CAN at a time (CAN details page)	View my CANs	Export list as CSV	Create one contract at a time	Edit one contract at a time	View one contract at a time	View my contracts	Export list as CSV	View aggregate spending plans when viewing CAN budgets	View expected / estimated CAN amount	View previous CAN amount

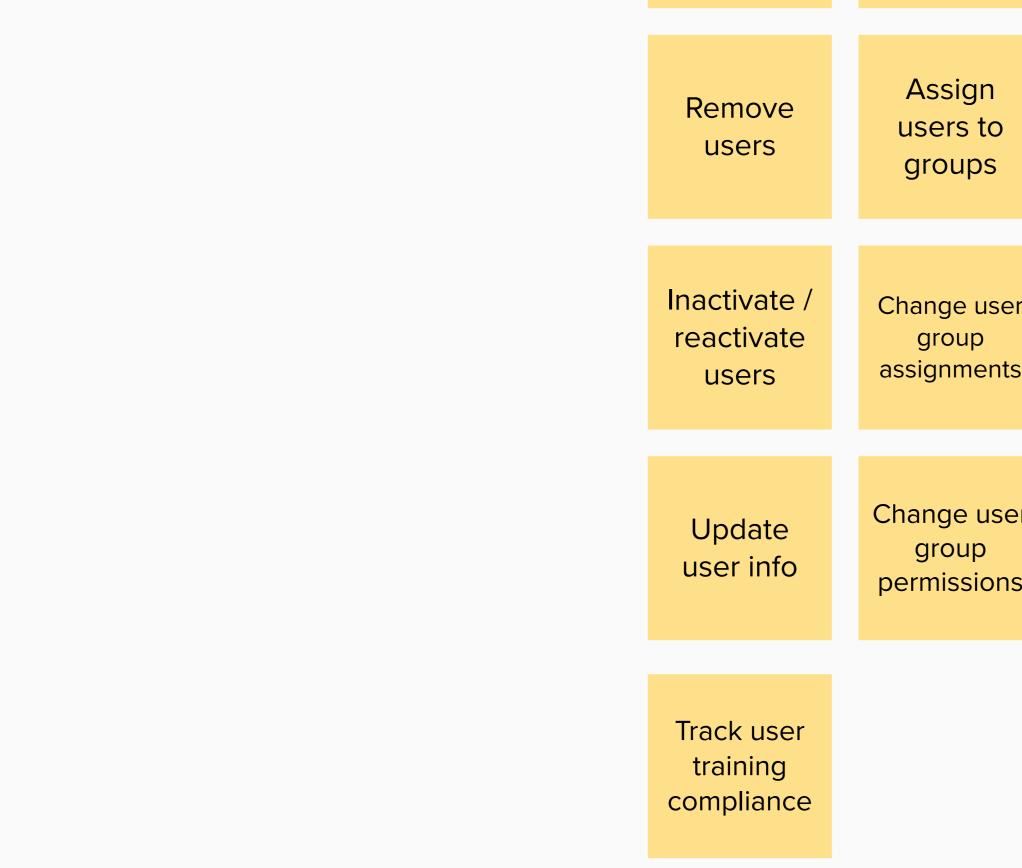


For every CRUD:

Who should be allowed to create, edit, delete, view?

What is the workflow / steps?

How do they get to the workflow?

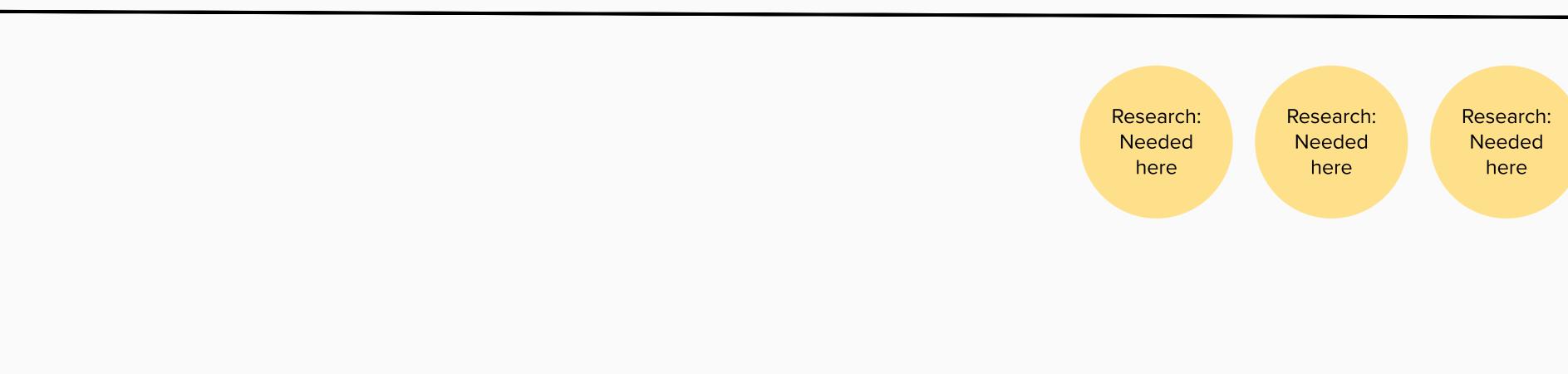


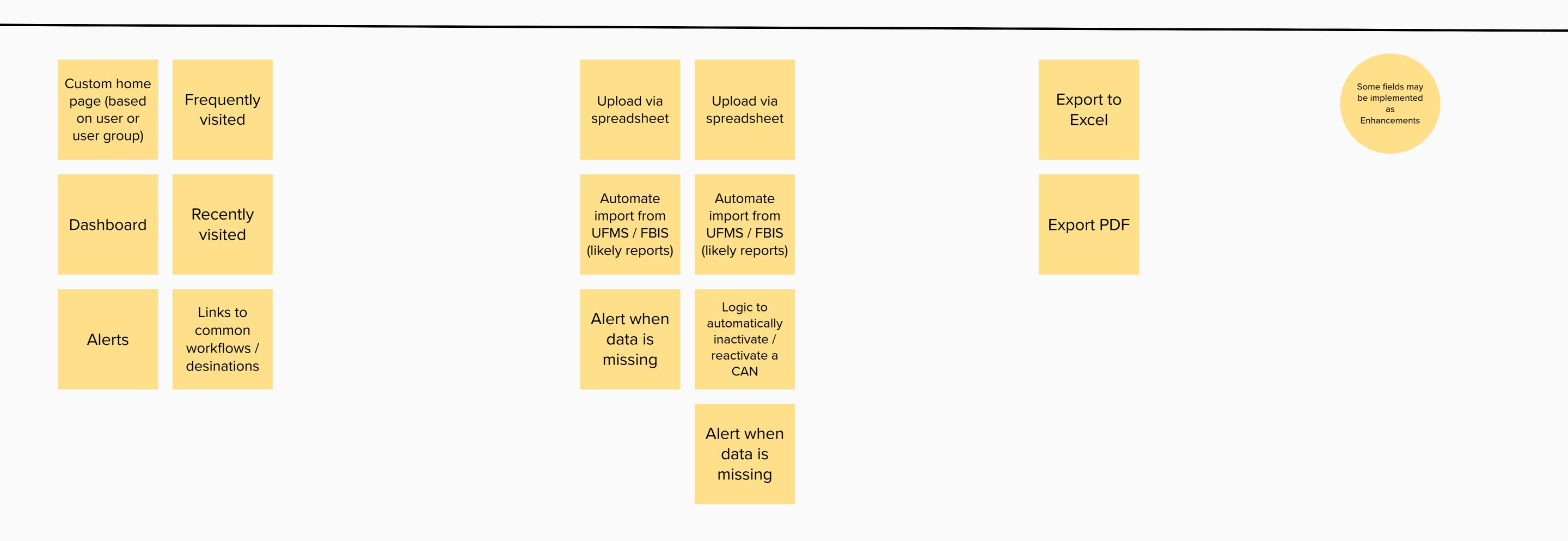
User management and permissions

Log in









Scratch Pad

