

Output 1	<u>Operational entities (create and retrieve operational entities)</u>	MoSCoW	Target
1.1	<u>Create/retrieve operational entities</u>		
EP01	As EC Operational manager, I want to manage operational entities all across cycle of operations: MIP (multi-annual indicative programme) at programming level, Action at identification and formulation level (and its underlying commitments), Lead-programmes, Programme, projects and support measures (facility) at implementation level so that I can monitor and report results on them: <ul style="list-style-type: none"> • <i>As long as CRIS is operating, I want to access/retrieve entities that have been created in CRIS: Programming (MIP), Decision, contract and their underlying commitments as well as associated information.</i> • <i>I want to create operational entities namely: Action, Programme, Lead Programme, projects, Support measure (facility).</i> 		
		MUST	2016
1.2	<u>Link operational entities with financial information</u>		
EP02	As EC Operational manager, as long as CRIS is operating, I want to retrieve from CRIS Financial (commitment level 1 (global commitment), Commitment level 2 (individual commitment), Payment) and Legal entities (Commission financing decision, financing agreement or other types of agreement, Contract), so that I can link them to my operational entities.	MUST	2016
1.3	<u>Add additional information on operational entities</u>		
EP03	As EC Operational manager, I want my operational entities (MIPs, Actions, Projects/Programmes/Lead Programmes and Support measures Facilities) to have at least a title, a brief description, a EUD or HQ Unit in charge, benefiting zone(s), implementation modality, sector(s) (as defined by DAC codes or other sectors), DAC markers, start and end dates and I want to have an overview of the financial situation of the associated decisions and contracts in terms of commitments and payments: <ul style="list-style-type: none"> • <i>I want to retrieve this information when already encoded in other systems (such as CRIS, MIS), so that I don't have to re-encode it.</i> • <i>I want to be able to enrich entities with additional relevant information (scope/list to be discussed with DUG)</i> 		
		MUST	2016
		SHOULD	2016
1.4	<u>Link operational entities across the cycle of operation</u>		
EP04	As EC Operational manager, I want that projects, programmes and lead programmes are linked with Instrument, Domain, MIP, Action, Commission Financing Decision, CRIS Decisions and Contracts, so that I can follow, drill down and navigate through them all across the cycle of operations as well as associating operational entities to the underlying financial information.	MUST	2016
1.5	<u>Ensure harmonised terminology</u>		
EP05	As DEVCO-NEAR-FPI manager, I want a harmonised terminology and definition for all operational entities, so that it reduces ambiguity and improve the consistency, clarity and understanding across EC users and other stakeholders.	MUST	2016

Output 2	<u>Results (Result management and monitoring)</u>	MoSCoW	Target
2.1	<u>Create and link result frames across the cycle of operation</u>		
EP06	As EC Operational manager, I want to encode, update, retrieve and display results across the cycle of operation in a seamless way: <ul style="list-style-type: none"> • <i>(a) At programming stage, I want to create and update for my MIP a structured sector intervention framework including specific objectives by sector of concentration and their related indicators (including type of indicator: qualitative or quantitative) with, when available the baseline and baseline year, the target and target year (both sex-disaggregated when relevant) and the source(s) of verification, so that I can monitor MIP implementation.</i> • <i>(b) At identification and formulation phase under project modality I want to create and update for my Action a logframe including overall objective (impact), specific objective(s) (outcome(s)), outputs and their related indicators (including type of indicator: qualitative or quantitative) with baseline and baseline year, target and target year and milestones and intermediary years (all sex-disaggregated when relevant), the source(s) of verification and assumption(s) so that use it as a basis during implementation phase.</i> • <i>(b) At identification and formulation stage under Budget support modality I want to create and update for my Action an indicative list of results indicators including overall objective (impact), specific objective(s) (outcome(s)), induced outputs, direct outputs and their related indicators (including type of indicator: qualitative or quantitative, variable tranches indicator) with baseline and baseline year,</i> 	SHOULD	2016
		MUST	2016
		MUST	2016

	<i>target and target year, milestones and intermediary years (all sex-disaggregated when relevant – additional disaggregation will be discussed with the DUG), source(s) of verification, so that I can use it as a basis during implementation phase</i>		
	<ul style="list-style-type: none"> <i>(c) At implementation stage, I want to create or update (based on the one from formulation phase) for my projects and programmes a logframe or an indicative list of results indicators (Support measures:/facilities do not require this.) or ask my implementing partner to do so, so that I can monitor my projects and programmes' results.</i> 	MUST	2016
EP07	As EC Operational manager, I want my results to be linked from (a) Programming (MIP) to (b) formulation (Action), and (c) implementation (Programme/Project), so that I can ensure coherence of my results chain across my operation cycle.	MUST	2016
2.2	<u>Be guided in the selection of relevant indicators and possible matching</u>		
EP08	As HQ Result coordinator from DEVCO, NEAR, FPI, I want to be responsible for the list of EU RF indicators (DEVCO), corporate indicators (NEAR or FPI) and potentially OMI, so that I can create, update, delete them when needed.	MUST	2016
Ep09	As EC Operational manager, I want to create OMI in particular when my priorities are not reflected in the (DEVCO) EU result framework indicators (thematic priorities, country priorities) not reflected in the EU RF, so that results can be aggregated by the system according to my needs	MUST	2016
EP10	As EC Operational manager, I want to be guided in the selection of indicators by accessing to a list of indicators: (i) from my previous phase in the cycle of operation programming (MIP)-formulation (Action) –implementation (Programme/ Project) or (ii) indicators included in relevant guidance documents with a clear view on those being used as Other Matching Indicators (OMI) or linked to an EU Result Framework indicator (EU RF) or other corporate indicator (NEAR, FPI).	MUST	2016
	As EC Operational manager, I want to link my indicator to an EU RF indicator or other corporate indicators (NEAR, FPI) or OMI so that I can match results by EU RF indicators or OMI:		
EP11	<ul style="list-style-type: none"> <i>(a) At programming stage, I want to match (when relevant) the indicator(s) of my MIP to one of the EU RF indicator or other corporate indicator (NEAR, FPI) so that this link is already set at identification, formulation and implementation phase.</i> 	SHOULD	2016
	<ul style="list-style-type: none"> <i>(b) At identification and formulation stage, I want to link (when relevant) the indicator(s) of my Action to an EU RF indicator or other corporate indicator (NEAR, FPI) or an indicator at MIP level (becoming OMI), so that this link is already set at implementation phase.</i> 	MUST	2016
	<ul style="list-style-type: none"> <i>(c) At implementation stage, I want to link (when relevant) the indicator(s) of my Project or Programme to an EU RF indicator or other corporate indicator (NEAR, FPI) or any other created OMI, so that results can be aggregated by the system by EU RF indicators or OMI.</i> 	MUST	2016
2.3	<u>Monitor results across cycle of operation</u>		
EP12	<p>As EC Operational manager, I want that current/latest available values of the indicators included in my sector intervention framework (MIP), logframe and/or indicative list of results (Programme/Project/Lead Programme) can be encoded, while keeping the earlier encoded values visible. The encoded values must be presented in such a way that I can easily compare with baseline, milestones and targets. As EC Operational Manager I also want to be able to update the baselines, milestones and targets.</p> <p>Data can be inputted by implementing partners, including relevant disaggregation and data sources:</p> <ul style="list-style-type: none"> <i>(a) In relation to programming documents, I want to report against MIP implementation.</i> 	MUST	2016
	<ul style="list-style-type: none"> <i>(b) At implementation stage, I want to be able (or request my implementing partner) to update at least once a year the current/final value of related value of the indicators including relevant disaggregation and data sources – including the management of indicators referring to BS programmes.</i> 		
EP13	As EC Operational manager, I want to or allow my implementing partner to upload key documents (such as progress/final reports, studies, site visits, minutes of programme/project steering committee, etc.) related to monitoring, so that I can validate them and easily access it.	MUST	2016
EP14	For results, based on the structure developed under EP06 bullet 4 and EP12, as EC Operational manager, I want the system to generate and display automatic color-codes and percentages or be able to manually encode a scoring (pre-define scoring notation to be further detailed) based on indicator values (including for indicators of BS programmes), progress from baseline towards milestones and targets, and comment on it, so that I can visualize easily the progress of my projects and programmes and I want to be able to support these key performance indicators (KPI) with a narrative report..	MUST	2016
2.4	<u>Quality control encoded results across cycle of operation</u>		

EP15	As EC Operational manager, I want to quality control any information encoded or document uploaded by an implementing partner (through an approval workflow of one or more steps), so that I can validate, amend, reject and comment on it.	MUST	2016
EP16	As HQ Result coordinator from DEVCO, NEAR, FPI, I want to be able to quality control any link between an indicator and an EU RF indicator or corporate indicators from NEAR or FPI or OMI before it becomes visible to other stakeholders, so that I can validate, amend, reject and comment on it.	MUST	2016
EP17	As HQ Result coordinator from DEVCO, NEAR, FPI, I want to quality control any indicator, so that I can flag them as SMART, amend them or comment on them. Quality control process should foresee interaction with EC Operational managers and eventually between them and the implementing partners as encoded in the form of questions and answers.	MUST	2016
2.5	Display aggregated/combined results information		
EP18	As EC Operational manager, I want to see result information in standard presentations of results data by project/programme/lead programme, EUDs/HQ units, Sector, country, region, year, financing instrument; so that I have a proper real time assessment of the operational portfolio performance at all levels. Indicators matching with EU RF or other corporate indicators (NEAR, FPI) or OMI should be aggregated across countries and presented in the same way.	MUST	2016

Output 3	Monitoring (Further monitoring at implementation phase)	MoSCoW	Target
3.1	<u>Monitoring activities, outputs and outcomes from the implementing partner (including milestones)</u>		
EP19	As EC Operational manager, I want my implementing partner to be able to report/comment on activities related to individual outputs and outcomes as well as on overall project and programme progress as part of its regular progress reporting.	MUST	2016
3.2	<u>Plan and monitor key events and activities from the EC Operational manager</u>		
EP20	As EC Operational manager, I want to access a calendar to schedule key events and milestones of my Project or Programme (site visits, steering committees, ROM missions, and other Programme events, such as meetings, commissioning and closing events, evaluation and audit missions..) so that it becomes my monitoring plan.	MUST	2017
EP21	As EC Operational manager, I want the monitoring and evaluation plan to be tailored in a flexible way, so that I can adapt it to my specific needs.	SHOULD	2017

Output 4	Integration (integration, migration and interoperability with other systems)	MoSCoW	Target
4.1	<u>Interoperability with documents storage systems</u>		
EP22	As EC Operational manager, I want a seamless and immediate access to all documents related to operational entities, regardless of where the documents are stored (CRIS, ARES, etc.) and in accordance with confidentiality rules, so that I don't have to search for them in another system.	MUST	2016
4.2	<u>Migration of Results information from other systems/local tools</u>		
EP23	As EC Operational Manager, I want any results information related to my operational entities currently stored in other system (such as MIS), to be migrated in OpSys, so that I don't have to re-encode them.	MUST	2017
EP24	As EC Operational Manager, I want whenever possible, key results information related to my operational entities currently stored in off-line tools (such as Excel) or documents (Actions), to be migrated in OpSys, so that I don't have to re-encode them.	MUST	2016
4.3	<u>Interoperability for reporting (EAMR)</u>		
EP25	As EC Operational Manager, I want to report at least once a year into OpSys on KPI 5 (implementation progress), KPI 6 (achieving results), KPI 18 (projects visited), KPI 19 (evaluation), Rr (ROM request) and I-4 (Project communication plan) for my Project or Programme, so that they could be reflected in the EAMR report through DWH.	MUST	2017
4.4	<u>Interoperability for ROM and Evaluation (ROM module, Evaluation module)</u>		
EP26	As EC Operational Manager, I want my projects and programmes to be the pivot entities for ROM and my requests for ROM to be automatically displayed in the ROM module workplan, so that I can start scheduling the ROM review	MUST	2017
EP27	As EC Operational Manager, I want my projects and programmes to be the pivot entities used in the evaluation module, so that I can schedule my evaluation based on an operational entities portfolio	MUST	2017
4.5	<u>Interoperability for transparency, communication and knowledge sharing purpose (GIS, IATI, EUDs internet websites, C4dev)</u>		
EP28	As EC Operational Manager I want to be able to flag/authorise which information/fields are going to be used for communication, knowledge sharing and IATI reporting, so that I can control which information is going to the public. By default, OpSys should already flag the information that must be available to the public for legal reasons.	MUST	2017

EP29	As EC Operational Manager, I want my Action, Project, programme or result to be geo-localised, so that I can ensure better communication, increased transparency and easier identification of where ongoing Projects and Programmes take place.	MUST	2017
EP30	As EC Operational Manager, I want that my projects/programmes become the reference entities for IATI reporting and metadata to be compatible with IATI reporting.	MUST	2017
EP31	As EC Operational Manager, I want the system to feed directly DEVCO-NEAR-FPI websites (EC Europa internet) and the corresponding EU delegation website with information on projects and programme (public documents, standard information package on projects and programme: easy to understand title, amount, stakeholders, dates, short description, results, etc.), so that I can better communicate on my project or programme.	MUST	2017
EP32	As EC Operational Manager, I want to be able to use my projects and programme information (public documents, standard information package on projects and programme: easy to understand title, amount, stakeholders, dates, short description, results, etc.) to feed my Capacity4dev project page, so that I can share knowledge on my project or programme.	SHOULD	2017

Output 5	Portal and user experience	MoSCoW	Target
5.1	Security (interface comply with protection rules)		
EP33	As EC user or authorised external user, I want the system to have authentication feature and Single Sign On supported by ECAS and aligned with the user categories defined in the functional requirements	MUST	2016
EP34	As EC user or authorised external user, I want the system to follow corporate data protection rules ¹ in collaboration with DEVCO's Data Protection Coordinator, so that data protection is implemented through built-in mechanisms (e.g. confidentiality, application of deletion rules, access rights) or statements (e.g. privacy statement, written consent, and disclaimer).	MUST	2016
5.2	Information (interface has correct, readable and up-to-date content)		
EP35	As EC user or authorised external user, I want the system to support multi-lingual interface with a provision for 4 languages (English, French, Spanish, and Portuguese with English as fall-back solution when a translation is not available), so that it is adapted to my working language (especially useful for external users, like local partners). <ul style="list-style-type: none"> As EC user or authorised external user, I want the system to be available in English As EC user or authorised external user, I want the system to be available in French As EC user or authorised external user, I want the system to be available in Spanish As EC user or authorised external user, I want the system to be available in Portuguese 	MUST MUST SHOULD SHOULD	2016 2016 2017 2017
EP36	As EC user or authorised external user, I want the system to be always up-to-date and that Data entered in the system are immediately available for further processing or view by the data encoder and related stakeholders (after validation when needed), so that it displays real-time information.	MUST	2016
5.3	Functionality (Interface works and don't break)		
EP37	As EC user or authorised external user, I want the system to have decent response times in Delegations where connectivity is an issue and Internet connection is slow, so that low bandwidth situations do not impact the use of key usability features. Regular auto-saving of the information encoded by any user must be a key feature of the system.	MUST	2016
EP38	As user, I want to work offline for specific tasks or in case of unreliable connectivity, so that I avoid losing data when the connection fails.	MUST	2016
EP39	As EC user or authorised external user, I want the system to be available 24 hours a day, 7 days a week (with an affordable down time of less than 1 day in case of breakdown or a serious issue); so that I can access it whenever needed	MUST	2016
EP40	As EC user, or authorised external user, I want to see all different versions and modifications of key programmes and projects information (to be further detailed with DUG)	SHOULD	2016
5.4	Usability (Interface allows users to complete tasks quickly and accurately)		
EP41	As EC user or authorised external user, I want to be able to use the system to fully work and tested on Firefox, Internet explorer, Chrome and Safari, so that external stakeholders will not be forced to use a commercial web browser.	MUST	2016

¹<https://myintra.ec.europa.eu/serv/en/dpo/Pages/index.aspx>

EP42	As EC user or authorised external user, I want the user interface to include key features (such as drag & drop features, auto-complete on searches, responsive UI components use of less click and less change of pages to search for content), so that it is similar to modern dynamic website.	SHOULD	2017
EP43	As EC user or authorised external user, I want the system to be mobile friendly (user interface that is suitable for mobile device (e.g. small form factors and touch screens), or that adapts itself when detecting a user from a mobile system), so that I can easily access information and use key features in a secured way with my mobile device.	SHOULD	2016
EP44	As EC user or authorised external user, I want to have Multimedia features of mobile devices (e.g. possibility to take pictures or videos from the mobile devices, so that I can link it to my operational entities in the system.	SHOULD	2017
5.5	Aesthetic (Interface looks unique, friendly and professional)		
EP45	As EC user or authorised external user, I want the user interface to be coherent all over the system (Application of well-known UI design patterns, EC UI guidelines and standardized look-and-feel).	MUST	2016
EP46	As EC user or authorised external user, I want the system to visualize user-friendly and intuitive pages for main entities including up-to-date key data, the related result framework and links with related operational entities at higher and lower levels in the cycle of operations, so that I can easily follow my operation cycle.	MUST	2016
5.6	Customization (personalized dashboard, notifications)		
EP47	As EC Operational Manager, I want my dashboard to be personalised and customisable (allowing configuration of a number of personal settings, typically found in modern information system: start page or favourite pages, frequency of email notifications, UI language, some control on the layout e.g. for local portfolio views or local programme dashboards), so that it is adapted to my needs.	SHOULD	2017
EP48	As EC user or authorised external user, I want to be able to customise the notification system, so that I receive what I am interested about when I need it.	SHOULD	2016
EP49	As EC user or authorised external user, I want the system to use geo-localisation features, so that it can propose me contextual information (allowing for example to show an operational officer visiting a programme data related to his location (local partners, programmes in the area, etc.).)	SHOULD	2017

Output 6	External access (Allow external users to encode or visualize information)	MoSCoW	Target
6.1	Provide permission to external user to provide inputs		
EP50	As EC Operation manager, I want to provide permissions to an external user (Implementing Entity manager, Partner country programme manager) to provide inputs directly in the system (manage results, upload documents), provided that there is an internal DEVCO/NEAR/FPI validation, so that I avoid having to re-encode the information.	MUST	2016
6.2	Provide permission to external user to visualize information		
EP51	As EC Operation manager, I want to provide permissions to an external user (Partner Country or Regional Organisation Representative, Development partner/Donor Representative, EU Member States Representative) to visualize some information in the system (as validated with the DUG), so that I can ensure transparency.	SHOULD	2017