Shareholder and Proxy Access Reporting Kit

You are a member of a consulting team supporting the implementation of a Shareholder and Proxy Access Reporting Kit (SPARK). The SPARK is envisioned as an “off-the-shelf” software product that provides its purchasers with all the data collection and reporting functions needed for the support of the SEC’s new Proxy Rule. Your goal is to complete an initial iteration of requirements analysis, design and implementation of a prototype system by the end of the semester. As many corporations now fall under the SEC’s new proxy rule, the Kit may be saleable to many. You need product to demonstrate the capabilities and range of your system.

Your team needs to produce an “INTERIM PRESENTATION” – an analysis and design document in about a month that includes:

1. A description of the system needed as per the vision document template. Provide the functional and non-functional requirements in the product features section of the template. You need to prioritize the requirements that you believe essential.
   Hint: Practically complete the Business Vision Template found in the project directory.

2. A description of the Use Cases identifying and specifying the essential functions needed in the software, with alternative flows depicting major decision steps in processing. Each use case should have a use case diagram, and a diagram of the relevant domain classes. An activity diagram may be included as needed;
   HINT: Refer to the two sample use cases, their respective use case diagrams, and respective class diagrams.
   You might want to use Visual Paradigm for this step but it is not obligatory. You can find the instructions of how to use Visual Paradigm in the project folder.

3. A domain class diagram in UML for the whole system;
   HINT: Just a class diagram for the whole system. This is easy if you have completed step 2.
   You might want to use Visual Paradigm for this step but it is not obligatory. You can find the instructions of how to use Visual Paradigm in the project folder.

4. A list, mockup, and description of the anticipated reports the system should output.
   HINT: Refer to the two sample reports found in the project directory.

5. A set of screen mockups for the user interface. Indicate the sequence of forms used by the users.
   HINT: Draw the forms (in any program you want).

This material should be gathered and presented in a professional manner – bound, divided, proof-read, and edited with care.

On the same day these materials are due, you will give a FORMAL presentation to the class explaining how your proposed solution meets the business needs. You will have about 8 minutes to present, plus question time. Create a PowerPoint presentation for the class with handouts for the instructors.

Later in the semester you will give your “FINAL PRESENTATION”. The final presentation binder should include revisions of the material from the first presentation, adding:
• a prototype system for some part of your system that reflects the vision, description, and design materials;
• a data dictionary, listing each data element in the database, its format, any special editing, and its meaning in relation to the project;
• an ERD that maps your domain class diagram into relational design.
• a CD containing the prototype, including access to all source code and sample data, and
• a simplified user manual for your software, containing instructions and images explaining how to run your prototype.

In addition your team will discuss your design and demonstrate the software at the date and time indicated for the FINAL PRESENTATION in the syllabus. Again, this is a FORMAL presentation, with PowerPoint and handouts for the instructors. All team members must present at least once during the course. All team members must be ready for questions and answers at each presentation, and to be dressed appropriately.

All of these deliverables should reflect the tools and techniques discussed in this and previous ITM courses.