

SPECIFICATIONS

Strategy Mapping Software

Introduction

This document describes the requirements (technical and functional) for the use of a software package used for developing strategy maps, and tracking metrics and measures related to strategy development and implementation. The specification is divided into seven critical areas, which are key to the integration and use of the software package. These areas include; primary function, reporting capabilities, compatibility, security, user interface, support and budget.

1. Primary Function

The software package shall:

- Be used to create detailed strategy maps and display progress reports for implementing a strategy within an organization. The software shall have the ability to create graphic strategy maps based on the Balanced Scorecard methodologies with drill-down and unlimited cascading capabilities down to each level of the organization.
- Link the organizational scorecards and allow a roll-up of information from multiple lower-level scorecards into higher-level scorecards.
- Have the ability to cascade metrics across multiple levels. This will allow tracking of metrics from various levels of management, and at various levels of detail, from general to specific.
- Be able to electronically store and organize all documents related to strategy development and implementation.
- Allow an administrator to assign and track actions related to the implementation of the strategy.
- Contain a calendar function to display events and milestones and set metric reporting periods.
- Be able to export data in common formats for other use, such as Microsoft Excel.

2. Reporting Capabilities

The software package shall:

- Provide browser-based access to progress reports using dashboards that display key metrics and other performance indicators. The colors and numbers on the dashboard shall automatically update based on the real data and evaluation criteria entered into the system.
- Archive all metric and performance data to allow users to monitor long-term trends.

3. Compatibility

The software package shall:

- Be multi-platform and browser-based (PC Windows and Mac OS X compatible). Across the center there is widespread usage of various platforms. After being given proper privileges, any person on the center should be able to access this software package from their standard issue computer system.
- Be accessible through multiple browsers (Internet Explorer-PC, Firefox-PC & Mac, and Safari-Mac).
- Utilize an application programming interface (API), which enables the software to easily interact with other software applications. All API documentation should be easily accessible to the user.

4. Security

The software package shall:

- Be easily installed on a common on-site central server where access and security can be managed by NASA.
- Have the option of a future expansion or conversion of the software from a central, on-site server, to a remotely-based software as a service delivery method (cloud-based application) with proper government IT security certificates.

5. User Interface

The software package shall:

- Have an elegant and intuitive interface which includes:
 - Graphic representations of the strategy maps
 - Stoplight or other color graphical indicators for metrics and measures
 - Dashboard control menus and reports, capable of modification and user customization
- Provide multiple levels of User access, to include at a minimum these three levels:
 - Administrators, users with full access to all functions
 - Editors, users that have access to enter new data periodically, as required
 - Reviewers, users that have access to review, but not alter in any way, all data reports

Not everyone is expected, nor should be allowed, to alter the interface or metrics. Furthermore, software packages, which allow different levels of usage, may offer pricing advantages.

6. Support

The software package shall:

- Have multiple avenues of technical support to allow a user to access help systems based on his/her own preference (electronic or live resources). As a minimum the help system shall include:
 - Online videos and tutorials
 - Electronic documentation and communication
 - Telephone support