

Process Configuration

		COSMOS	WORKBENCH	ACTUATE
Subject	Capability			
Multiple Workflows	The proposed software system must demonstrate the ability to be configured to support existing workflow processes	●	✘	
Process Configuration Representation	The tool represents the process graphically, and provides a toolset for manipulating process steps using drag-and-drop, mouse-drag, and rubber-banding to implement process changes.		✘	
Process Step Limit	The tool must be capable of implementing workflows with up to 100 distinct process steps.	●	✘	
Process Step Transition Limit	The tool must be capable of implementing workflows that accomodate at least 25 transitions between each of the process steps.	●	✘	
Reconciling In-Process Records	The tool must be capable of resolving revised workflow process requirements in records created under previous workflow process requirements.	●		

Configuration Features

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Customizable Data Fields	The software system must allow data fields to be customized to accommodate the needs of any workflow. This would include options for selection of (at a minimum) the following types of fields: Date/Time fields Check Boxes Drop-down fields Key Selection fields Memo fields that allow input of up to 20 megabytes of text, are capable of handling "special" characters (including single quotes and other ASCII characters that may be brought over from copy/paste from other applications and other platforms), and include a functional Spell Check capability.		✘	
Error Messages	Error messages will be in clear English and utilizes the terminology used on the screens.		✘	
Help	Web-based help will be provided, to include general instructions and context sensitive field specific help. The system will support the modification of Help screens through web-based administrative control tools.		✘	
Validation	Validation will be done at the field, cross field and file level.		✘	

Work Flow Management

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Automatic Assignment	The tool must have the capability of automatically assigning records according to predefined criteria (for example, assign an approval process to the manager based on the Organization involved).	●	✘	
Confirmations	The system will support process workflow specification of a confirmation for user actions, including generation of a new record, completion of a process step in the workflow, and reassignment of responsibility for performance of a process step.			
Electronic Mail System	The tool must interface with SMTP mail services.	●		
E-Mail Notifications	The tool must provide configurable, rule-based email notifications with separate rules and settings available for each workflow.	●	✘	
Manual Assignment and Transfer	The tool must provide the ability to assign and transfer records to any predefined group or individual.	●	✘	
Multiple Alerts	The tool must have the ability to generate multiple email alerts based upon record type and priority.	●	✘	
Report Dissemination	The tool shall support sending query results and reports to a user-defined list of email recipients.			A
User Home Page	After user authentication, the user will be presented with a home page with links to: <ul style="list-style-type: none"> - initiate a new record - act on records which require that user's input - search for an existing record - review an existing record 	●		
User Home Page Customization	The user's home page can be personalized by the user to change the order in which action links are displayed, and allow links to be hidden. The home page customization will be stored in a user's profile for retention between sessions.			
Workflow Navigation	System navigation must allow for simple and intuitive movement through the transaction workflow.	●		

Graphical User Interface

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Attachments	The tool must provide the capability to attach files, URLs and emails to records.	●		
Date Calculations	The tool must support Date Difference calculations using Calendar Days, Week Days (Calendar Days wo/weekends), and Business Days (Week Days not including pre-defined Holidays).			
Drop-Down Menus	The tool must provide drop-down menus that allow for a set of values to be displayed that are dependent upon the value selected from another pull-down menu or the process context.	●		
Error Logging	The system will have the capability to log user errors by module to provide a database for user training needs as well as recommendations for system changes. This capability can be turned on or off by the system administrator.			
Field Entry	Text fields will support cut/paste, drag and drop, and inclusion of "special" characters (including " , ' , / , & , and *).	●		
Field Navigation	Progress through the fields on input screens will, in general, be left-to-right, and top-to-bottom.	●		
Field Population	Fields (visible to the end user or not) can be set up to populate automatically based on process contextual conditions or values entered in other fields by the user.	●		
General GUI	The general look and feel of the application should comply with style and actions described in "Microsoft Windows User Experience" (1999), as applicable to the browser experience.	●		
Mobile Device Integration	The tool provides interaction with mobile/portable devices via HTML 4.0 - Mobile support.			
Screen Navigation	Major sections of transaction processing will be organized on the presentation page in a logical and intuitive manner that minimizes user training requirements.	●		
Spell Check	All memo fields have access to a Spell Check feature that is built into the software tool.	●		
Standards	The tool will implement a consistent use of terms, colors, fonts and screen placement of visual elements and data fields.	●		
TimeStamp Centralization	All components of the system that generate timestamps will be able to be synchronized to the same reference (network) time.	●		
Timezones	Timestamps will be in 24 hour military format and be able to easily reference both a service agent's and end user's local time across all world timezones.			
Web-Based User Interface	All functionality should be available via an HTTP session.	●		

Data Analysis / Reporting

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Customized Metrics	The tool shall provide for the definition and reporting of metrics based on the filtering and/or mathematical manipulation of the process metrics.			A
Partial Searches	The system will allow for searches to be conducted on full and partial text key.	●		
Process Metrics	The tool shall provide for capture and reporting of the following metrics: count of active records in each process step average time spent in each process state list active records in a process state by key fields (such as: responsible user, user organization, process start or finish timestamp)	●		A
Queries	The tool must provide query, report generation and keyword search capabilities.	●		A
Scheduled Queries	The tool will support user definition of a query or queries to execute periodically, at specified times, and store the results. The tool shall support sending query results to a user-defined list of email recipients.			A
Text Searches	Full text search is supported on selected fields.	●		A
Time-Based Alerts	The tool must provide the capability to set time-based alerts and escalations for any issue if the issue is not acted upon by the specified time and date.			
User Queries	The tool will support user definition of a record selection filter using GUI that allows selection of fields to display, ordering, grouping, and the use of logical operators			A

Security

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Access to Users and Groups	It must provide the ability to assign different access privileges to individual users and groups of users.	●	✘	
Anonymous Users	Allow users to sign on anonymously, but limit the capability to a few restricted process steps (to report problems).	●	✘	
Change Control	The tool must provide a robust audit log to track the historical record of events.	●		
Controlled Access to Processes	It must provide the ability to control access to processes, individual data records and fields within individual records.	●	✘	
Proxy / Delegation of Authority	Users must have the ability to submit and approve a record on behalf of another user, when authorized by the other user to do so. When operating in this fashion, system will capture both who actually performed the activity, as well as who they performed the activity for.	●		
Scalability	The tool must initially accommodate at least 5,000 user profiles.	●		
User Environment	The tool must provide for the automatic reporting of a user's computer environment at the point when a record is created (OS, browser type and version, IP address, etc.).			

Interfaces

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Data Import and Export	The tool must provide data import and export capability.	●		
Interface with Other Modules/Applications	The software system must provide an Application Programming Interface (API) to facilitate the development of automated interfaces with other modules or applications in the production environment. Typical applications may include those that address: trend analysis, employee listings, organizational structure, requirements references, and records management, etc.	●		
Records Export	The tool must provide the ability to export data associated with the finalized record electronically in XML (specify the DTD) and/or Adobe PDF format.	●		
Records Transfer	The tool must provide the ability to distribute the finalized record electronically to a predefined network location, records management application, and/or predefined email address.	●		
Import and Export of Process Definition	The tool must be capable of exporting and importing the workflow definition, to facilitate process development and testing.		✘	