

Discovery Meeting

Project Name

Date

Attendees -

Introduction

Review request

(Paste the project submittal form here before meeting. If one wasn't submitted, ask requestor to submit it.)

Review project request and fill in/discuss as needed

Scoping

Users

How many users?

What kind of hardware will your primary users rely on? mobile device, desktop pc. etc.

Do you need user roles to do different things in a system?

Who needs the ability to view the solution/app? Public?

Who needs the ability to edit the solution/app? Public?

Will different levels of user (editing) permissions be needed? If so, explain.

Who will perform user account management?

Integrations

Does the solution need to pull in data from an external system? E.g. GIS, eCapris, AMANDA, Data Tracker?

Does the solution need to push data to an external system? E.g. GIS, eCapri, AIMS, AMANDA, Data Tracker?

Workflow

Does your workflow require an approval process? What more can you tell us about that?

Do you have a need for users to be notified automatically from a system (ex. Status change, form submitted, approval request?)

Data

- How many database tables, overall complexity of Entity Relationship Diagram?
- How many records will your solution need to handle?
- Does your solution need to collect or visualize geospatial data?
- Do your records need to tie to authoritative address or ATD asset information?
- Will you need to import legacy data?
- Does your business need require strict records retention?

Does the data you're tracking have:

- Personal Identifiable Information (PII)?
- Health Information (HIPAA)?
- Criminal Justice Information (CJIS)?

Solutions

- Have you considered any off the shelf solutions?
- How much of the scope of work can use off-the-shelf systems vs. open-source custom development?

Prioritization

[List of customer's existing feature, enhancements, + new application requests]

- Prioritize

Resources

- Example files, spreadsheets
- Similar solutions or examples