



# Detailed Design Traceability Matrix FSA Financial Partners Portal - Release 2

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Version: 1.0



High-level Function	Requirement Title	How function is Satisfied	Detailed Design Reference Section
<b>2.1 General Requirements</b>	2.1.1 Notify user when they leave portal to go to non-Ed site	Will provide either a 'disclaimer' tag or a window alert when users leave the portal site to go into a non-ED site.	2
	2.1.2 Document Posting/Modification Information	Will provide a 'last modified' stamp every time a document or page is updated, modified or created.	3
	2.1.3 Document Format Tag	Add a tag next to each document posted on the site that clearly states what format it is in (PDF, Word, HTML, etc.) Note: HTML is not the preferred format.	3
<b>2.2 Left Navigation</b>	2.2.1 THOMAS Link	Add a link to THOMAS (Thomas.loc.gov) in the Publications section of the Portal.	4
<b>2.3 Content Management</b>	2.3.1 Content Management Tool	Build content management tool (Interwoven) for Financial Partners.	Refer to the Portals Content Management Design-FP document
<b>2.4 Community Members Search</b>	2.4.1 Data Updates from PEPS and Data Mart	Extract data for FFEL schools, Lenders and GAs from PEPS and Data Mart. Frequency and level of automation are to be determined.	6; Struts Pages 1.1
	2.4.2 Secondary Markets Category	Add a consolidated list of Secondary Markets to the Community Members Search. Users will be able to query for these secondary markets using the Community Locator, the Category Search, or the Alphabetical Search.	6; Struts Pages 1.1
	2.4.3 Search 'ALL' Option	In the 'Search by Category' section of the Community Members Search page, both drop-down boxes on the left-hand side should include an 'ALL' option. This allows users to either perform an alphabetical search across all the community members or perform a search by category across all community members.	Struts Pages 1.1
	2.4.4 Lender IDs and Locations	Lender IDs and locations will be added to the list of Lenders in the Community Members Search. The data needed is	Struts Pages 1.1



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		City, State, and Zip. This information will be pulled from legacy systems (FMS/Data Mart) and it will be a one-time population.	
	2.4.5 Direct Loan Schools	Data consisting of Direct Loan Schools will be added to the Community Members Search. This information is in PEPS. There were 1700 records as of 4/26/02.	Struts Pages 1.1
<b>2.5 Contact Resources</b>	2.5.1 State Contact Information	The state contacts for each region will be added to the specific regional pages. The map will remain regionally divided, but within each regional page the user will see the name of the region, the name of the Regional Director, the RD's email and phone number, the mailing address for that region, and the state contacts. The state contacts will be listed alphabetically (by state) and will include the contact's name, email, and phone number. Also, the RD's description at the bottom of the page will be removed.	5
	2.5.2 Map Legend	Map - Add text describing color scheme of map.	5
	2.5.3 Mail Client Hot Link on Organization Chart	When a user clicks on a person on the organization chart they will see a pop-up window with information on that individual. In that pop-up window they will see the person's name, title, location, e-mail address, phone and responsibilities. When the user clicks on the person's email link it should automatically open their default mail client with their email address pre-populated in the 'To' field.	7
	2.5.4 FSA Organization Charts	Details TBD	7
<b>2.6 Loan and Grant Resources</b>	2.6.1 Reorganization of Loan and Grant Resources Page	The resources listed on the Loan and Grant Resources page will have short descriptions introducing the resource.	N/A



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	2.6.2 Students Portal Link	There will be a link at the bottom and top of the Loan and Grant Resources Page that reads something similar to 'If you are a student looking for counseling resources or loan/grant information, please see our Students Portal at <a href="http://www.studentaid.ed.gov">www.studentaid.ed.gov</a> (hyperlink)"	8
	2.6.3 Feedback Link	There will be a 'Feedback' link at the bottom of the page in case the community notices any critical resources that are not listed. The link will go to the following address: <a href="mailto:fpportal@ed.gov">fpportal@ed.gov</a> .	9
<b>2.7 Publications</b>	2.7.1 Reorganization of Publications Page	The publications listed on the Publications page need to be organized more logically. For example, all of the handbooks, the user guides, the Acronym List, the NSLDS Status Codes, and the Lender Audit Guide should be in a general "Reference Material" (Documentation) section within the Publications page. Also, the regulatory and legal information such as New Federal Registers, Dear Partner/Colleague Letters, and Electronic Announcements should be grouped within a "Regulatory and Legal Information" section on the Publications page. There should also be a "Statistics and Trends" section that contains Top 100 Originating Lenders list and the Default Rate Materials information.	10



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	2.7.2 Remove VFA Initiative	Remove the VFA Initiative needs to be removed from the Publications page. Any information that is not already in the VFA Initiative section of the Current Activities page should be moved from the Publications page to the Current Activities page of the portal.	10
<b>2.8 Counseling Resources</b>	2.8.1 Delete Counseling Resources Page	Delete the entire Counseling Resources Page from the portal.	N/A
<b>2.9 Community Calendar</b>	2.9.1 Email Link to FPPORTAL@ed.gov	There will be an email link to <a href="mailto:fpportal@ed.gov">fpportal@ed.gov</a> at the bottom of the Community Calendar page so community members can inform the team of new entries.	11
<b>2.10 FMS</b>	2.10.1 User Buttons	There will either be FMS 'user buttons' added to the top of the FMS page (in addition to the user buttons that are already at the bottom of the FMS page) or the scrolling will be minimized such that the users can see the existing 'user buttons' (at the bottom of the FMS page) without scrolling down.	N/A
<b>2.11 Interest Rates</b>	2.11.1 Flag New Interest Rate Information	Whenever new Interest Rate information is posted, the user will be notified on the 'What's New' page and in the 'Interest Rates' box on the home page.	15
<b>2.12 Search/Advanced Search</b>	2.12.1 Department of Education Link	There will be a link to the Department of Education at the bottom of every Search/Advanced results page. There will also be text explaining to the user 'If you have not found what you are looking for, you can also try searching the Department of Education's website at <a href="http://www.ed.gov">www.ed.gov</a> '	Struts Pages 1.2
<b>2.13 What's New Page</b>	2.13.1 News, Posting, and Announcements	There will be a new page created on the portal called the 'What's New' page. This page will contain only recent news and/or postings (i.e. new forms, meeting minutes, presentations, announcements.) This page will be as dynamic as often as the page is updated.	15



**FSA Portal Rollout Project – Task Order #79**  
*Financial Partners Portal Release 2 - Requirements Traceability Matrix*

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