

- 1) Request Review
 - 1.1) Sign In
 - 1.2) New Request Info
 - 1.3) Attach File(s)
 - 1.4) Review Request
 - 1.5) Confirmation
 - 1.6) QA Request Review
 - 1.7) Request Review Module Complete
- 2) Marketing Review
 - 2.1) Sign in – email and password
 - 2.2) Dashboard
 - 2.2.1) 3 tabs
 - 2.2.1.1) New
 - 2.2.1.2) In Process
 - 2.2.1.3) Archived
 - 2.2.2) Search
 - 2.2.3) Sort
 - 2.3) Request Data
 - 2.3.1) Review – not editable
 - 2.4) Status Update
 - 2.4.1) Assign Status
 - 2.4.1.1) moves job from "new" to "in progress" tab in dashboard
 - 2.4.1.2) Make Comments
 - 2.4.1.2.1) Update button
 - 2.4.1.2.1.1) expands page with comment box to make notes (save/not send) and add attachment(s) (optional)
 - 2.5) Communications
 - 2.5.1) search comments
 - 2.5.2) sort columns
 - 2.5.3) view communication history
 - 2.5.4) send new message (attachment optional)
 - 2.5.4.1) notification (email sent w/ link to any uploaded file(s))
 - 2.5.4.1.1) add comment (append default message if link to file(s) included)
 - 2.5.4.1.2) add attachment
 - 2.5.4.1.3) add recipient(s)
 - 2.5.4.1.4) send
 - 2.5.4.1.5) save new message as first row in communication history
 - 2.6) Project Team
 - 2.6.1) view team members
 - 2.6.1.1) pulled from initial request submission
 - 2.6.2) add team member
 - 2.6.2.1) pogo verification
 - 2.6.3) edit team member
 - 2.6.4) delete team member
 - 2.7) Final Approval
 - 2.7.1) does this require series 24 approval?
 - 2.7.1.1) yes, series 24 approval required
 - 2.7.1.1.1) upload final file(s)
 - 2.7.1.1.2) notify principal button
 - 2.7.1.1.3) enter message (append link to file(s) plus approve/not approve links)
 - 2.7.1.1.4) add attachment(s) (PDF)
 - 2.7.1.1.5) send
 - 2.7.1.1.6) save new message as first row in communication history
 - 2.7.1.1.7) when approved
 - 2.7.1.1.7.1) prompts archive button
 - 2.7.1.2) no, series 24 approval not required
 - 2.7.1.2.1) upload final file(s)
 - 2.7.1.2.2) archive button appears
 - 2.7.2) when archive selected
 - 2.7.2.1) job is closed
 - 2.7.2.2) page no longer editable – show final PDF
- 2.8) QA Marketing Review
- 2.9) Marketing Review Module Complete
- 3) Principal Review
 - 3.1) open email notification with included links (see 2.7.1 above)
 - 3.2) approve
 - 3.2.1) click approved link in email
 - 3.2.2) browser window opens with approved message and optional comments
 - 3.2.3) send/cancel
 - 3.2.4) receive confirmation of approval
 - 3.3) do not approve
 - 3.3.1) add comments
 - 3.3.2) click not approved link in email
 - 3.3.3) browser window opens with not approved message and optional comments
 - 3.3.4) send/cancel
 - 3.3.5) receive confirmation of not approved
 - 3.4) QA Principal Review
 - 3.5) Principal Review Module Complete
- 4) Pre-launch QA
 - 4.1) First Pass QA
 - 4.2) Report Bugs
 - 4.3) Resolve Bugs
 - 4.4) Final, Full QA
 - 4.5) Pre-launch QA Complete
- 5) Launch
 - 5.1) Push live
 - 5.2) Post-launch Sanity Check/QA
 - 5.3) Phase 1 Project Complete

