

# Project Management Plan – Siddhartha Engineering Software Development

## 1. Plan of Actions: From Macro to Micro

### Macro-Level Phases (Project Lifecycle)

Phase	Key Actions
Initiation	Understand objectives, collect existing system issues, meet stakeholders
Planning	Create scope, timeline, resource, and risk plans
Execution	Assign tasks, manage development, monitor quality
Monitoring	Regular updates, track milestones, adjust tasks
Closure	Final testing, deployment, documentation, feedback, delivery

### Micro-Level Actions (Detailed Tasks)

#### **Initiation**

- Understand software challenges (e.g., missing inventory module, lead management issues)
- Stakeholder meeting to finalize exact goals
- Create Problem Statement Document
- Approval from stakeholders

#### **Planning**

- Prepare Project Charter
- Define scope (e.g., 5 modules like Inventory, Lead Management)
- Create Work Breakdown Structure (WBS)
- Timeline planning using Gantt Chart or Excel
- Prepare Risk Management Plan

#### **Execution**

- Prepare detailed Software Requirement Specification (SRS)
- Assign module-wise development

- Use Agile model with sprints
- Regular team meetings
- Prepare Test Plan

### ***Monitoring***

- Use tools (like Trello/Jira) to track tasks
- Provide status updates via reports/emails
- Adjust project timeline or tasks based on delays

### ***Closure***

- Final testing with client
- Deployment
- Prepare User Manual and training materials
- Collect feedback
- Final sign-off from client

## **2. Documents to Prepare**

Key documents created throughout the project lifecycle:

Phase	Document
Initiation	Problem Statement, Stakeholder Meeting Notes
Planning	Project Charter, WBS, Scope Document, Risk Plan, Timeline
Execution	SRS, Functional Spec, Test Plan, Meeting MOMs
Monitoring	Weekly Status Reports, Sprint Reviews
Closure	Deployment Plan, User Manual, Feedback Form, Handover Document

### **Sample Document 1: Project Charter**

- Project Name: Siddhartha Engineering Software Modernization
- Project Manager: Drashti Shah
- Start Date: July 1, 2025
- End Date (Est.): Sep 30, 2025
- Objective: To develop a modern, efficient, web-based software with Inventory, Lead Management, Billing, and Reporting functionalities replacing their outdated .NET-based system.

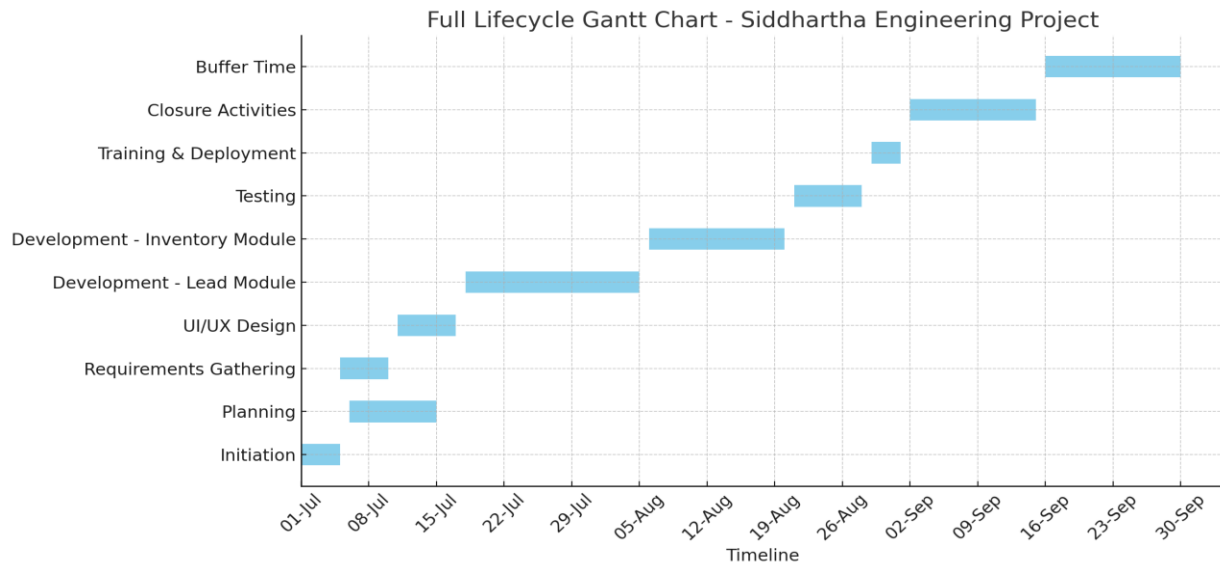
- Scope: Company Profile, Lead Management, Quotation & Billing, Inventory Module, Purchase Module, User Role Management
- Deliverables: Working Software, User Manual, Training, Final Deployment
- Constraints: Must be delivered in 4 months, Budget undefined.

#### Sample Document 2: Work Breakdown Structure (WBS)

ID	Task	Sub-Task
1	Requirements	Stakeholder Meeting, Document SRS
2	Design	UI Wireframes, Database Schema
3	Development	Module-wise coding (Lead, Billing, Inventory...)
4	Testing	Functional Test, UAT, Bug Fixing
5	Deployment	Hosting, Client Training, Documentation

### 3. Tools Used in Project Execution

Purpose	Tool	Reason
Documentation	MS Word / Google Docs	Easy and accessible
Planning	Excel / ClickUp / GanttProject	Visual timelines
Task Tracking	Trello / Jira	Monitor progress
UI Design	Figma / Canva	Wireframes
Communication	Gmail, Google Meet	Status sharing
Testing	Google Sheets / Test Link	Test case tracking
File Sharing	Google Drive	Storing documents
Code Repository	GitHub	Source control (if needed)



## Software Requirements (SRS)

**Project Name:** Siddhartha Engineering Software

**Prepared by:** Drashti Shah

**Date:** July 5, 2025

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### 1. Purpose

This software will replace the old system used by Siddhartha Engineering. It will help the team manage leads (inquiries), create quotations, handle inventory, and generate bills — all in one system.

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### 2. About the Software

- It will be **web-based**, easy to access from anywhere.
- It will have **logins for different users** based on their job roles.
- It will help the company **save time and avoid mistakes** in managing business work.

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### 3. What the Software Will Do (Features/functional requirements)

#### 3.1 Company Profile

- Add basic info like company name, address, GST, PAN, etc.
- Manage data for Indore and Ahmedabad branches.

### **3.2 Lead Management**

- Record new inquiries (company, product, quantity).
- Assign leads to employees.
- Track progress (Open, Quotation Sent, Success, etc.).

### **3.3 Quotation & Billing**

- Create quotation from inquiry.
- Change price or terms before final billing.
- Generate final invoice in PDF format.
- Track if payment is received.

### **3.4 Inventory & Purchase**

- Add products, suppliers, and warehouse locations.
- Track stock and where it is kept.
- Use barcode to scan products.
- Manage damaged stock returns.

### **3.5 User Roles**

- Give permissions based on job (admin, sales, purchase, etc.).

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## **4. Other Requirements (non functional requirements)**

- Should work on mobile and desktop.
- Needs to be safe and secure.
- Should handle many users at once.
- Must generate useful reports.

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## **5. Assumptions**

- Client will provide old data.
- Development will be done step-by-step.
- Users know basic computer usage.