

Functional Requirement Specification Document

For

CRM Application Development for
Research

Submitted to



Eli India

Submitted by



Zelite Solutions Pvt. Ltd.
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Contents

1. Document Objective	4
2. Project Scope	4
3. Technical Requirements.....	4
4. Deployment Approach	5
5. Out of Scope.....	5
6. Security Roles & Permission.....	5
6.1 Application Admin	5
6.3 Vendor Lead.....	5
6.4 Researcher User.....	5
7. Application Functionalities.....	5
7.1. User Management	6
7.1.1. Vendor Profile	6
7.1.2. Manage Users	8
7.2. Manage Projects	10
7.2.1. Add Project.....	10
7.2.2. Batch Management.....	12
7.3. Work Allocation	14
7.4. Data Capture	15
7.4.1. Entry Screen	16
7.5. Reports	18
7.5.1. Project Status Report	18
7.5.2. Productivity Report	19

1. Document Objective

The goal of this document is to outline a recommendation and a schematic design for developing Vendor Application development on PHP aimed at serving the business objectives. The approach we follow throughout the document is a methodical one. As per discussion in detail with the stake owners in order to understand the requirement, identify gaps in existing process and areas of concern when compared against desired business requirements, the document concludes by presenting the functional scope and requirement analysis in detail.

2. Project Scope

- Application Admin (Default Application User)
 - Create / Edit vendor
 - Add / Edit Vendor Admin user
 - Add / Edit Project Manager user
 - Add / Edit Entry user
 - Upload Batches
 - Download Output
 - View project & productivity reports
- Vendor Lead
 - Assign records to the Entry user
 - View Reports (Vendor Specific)
 - Download Output
- Researcher User
 - Process the records (using entry screen)
 - View (own) productivity report

3. Technical Requirements

- Hardware
 - A mid-level desktop machine with the below configuration can be considered to host the Application and Database server.
 - Intel 3.5 GHz; i3, i5 or i7 Processor (Greater than 4th Gen)
 - DDR3 8+ GB PC RAM
 - 100 GB + Hard disk space
 - Dual Core 2 GB RAM or above
 - Min. 5GB HDD free space
- Software
 - Microsoft windows Server, Linux, Ubuntu operating System
 - PHP v7.x Release
 - Apache Web-Server
 - G-Zip Compressor
 - MY SQL 5.7.x
 - Windows 7 and above or Linux OS
 - MS IE - v10 or above
 - Latest Mozilla Firefox
 - Latest Google Chrome

4. Deployment Approach

- Deploy Custom build application and database.
 - Internal Development Environment Setup
 - Testing Internal
 - UAT (Provide remote access to client for Testing)
 - Live Deployment Database and Necessary Code.
 - Testing on Live Server
 - Go Live Sign Off

5. Out of Scope

- Integrating with other third party application or hardware
- Data Migration
- Any Printing alignments
- Export in pdf or any other file format (only excel)
- Data or database Maintenance.

6. Security Roles & Permission

6.1 Application Admin

Application admin will be managing the application permissions & will be able to manage the Vendor profile and entire user management. Application admin can create Vendor Lead and Entry users.

Application Admin will have provision to create project, manage batch allocation to different vendors and review the project status.

6.3 Vendor Lead

Project Manager will have provision to allocate the batches among users / team members. Project manager can review the reports specific to vendor.

6.4 Researcher User

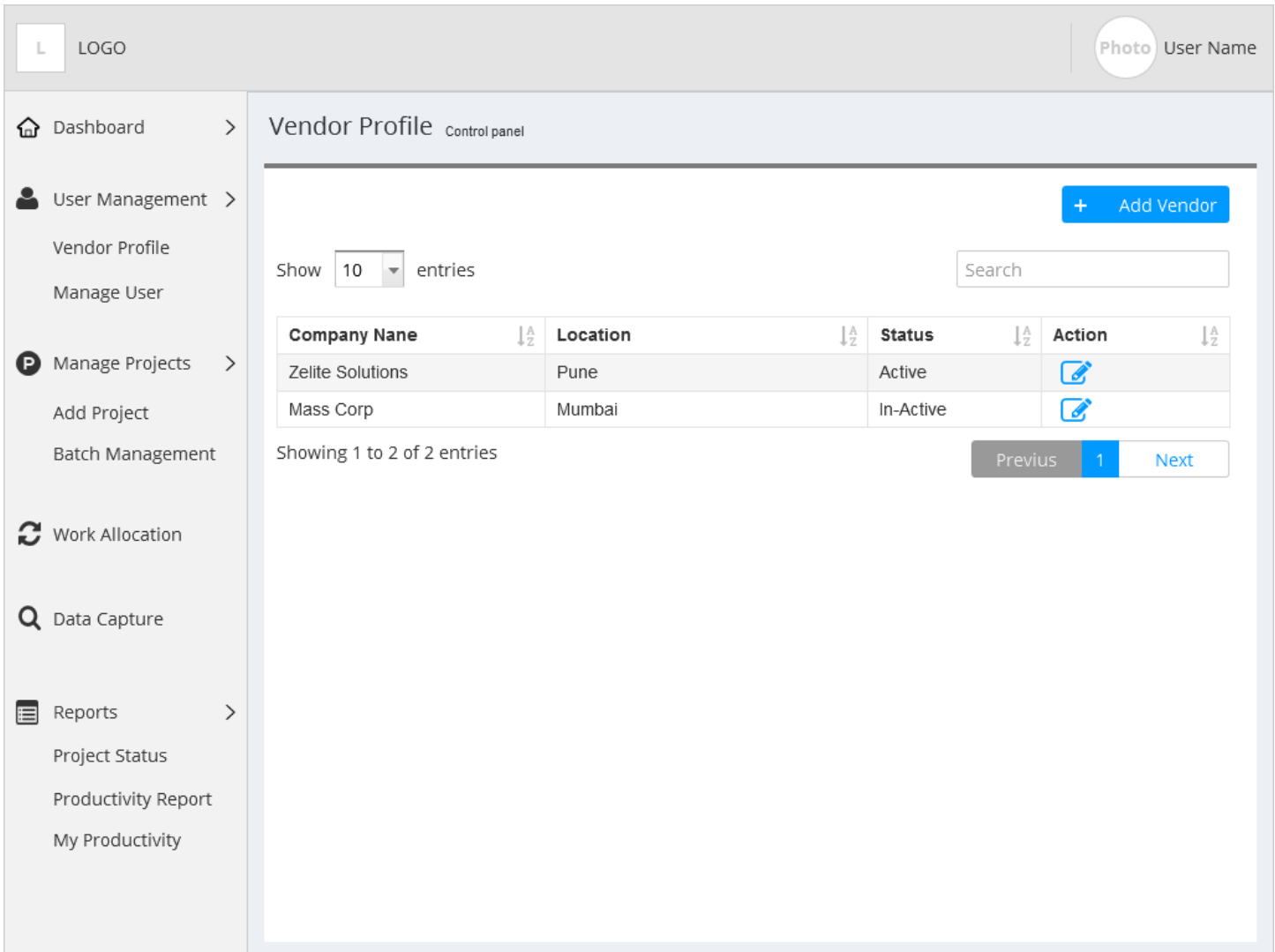
Researcher will have permissions to enter the data into the data entry application screen. The user can view his/her own productivity.

7. Application Functionalities

Please note that below functional specification is defined based on the initial understanding of the requirement & the screens are designed to understand the basic functionalities of the application. However the actual application theme / screens may vary.

7.1. User Management

7.1.1. Vendor Profile





Vendor Profile Control panel

+ Add Vendor


Show 10 entries

Search

Company Name	Location	Status	Action
Zelite Solutions	Pune	Active	
Mass Corp	Mumbai	In-Active	

Showing 1 to 2 of 2 entries

Previous 1 Next

- On click of Create Vendor button, new page will open to add new vendor.
- This  icon allow admin to update vendor information, change the status and roles.
- Search option allow user to search the vendor by name.
- Alphabetically sorting available for all columns

Add Vendor

L

LOGO

Photo User Name

Dashboard >

User Management >

Vendor Profile

Manage User

Manage Projects >

Add Project

Batch Management

Work Allocation

Data Capture

Reports >

Project Status

Productivity Report

My Productivity

Add Vendor Control panel

Company Name*

Input Field

Location*

Input Field

Contact Person*

Input Field

Phone*

Input Field

Mobile

Input Field

Status*

☐ Active

☐ In-Active

Save

Cancel

- Text field for Vendor Company Name.
- Vendor company location.
- Contact person full name.
- Phone and Mobile contact details.
- While creating a new user status is default active, only update action will show active, in-active buttons.

7.1.2. Manage Users

L

LOGO

Photo

User Name

Dashboard

User Management

Vendor Profile

Manage User

Manage Projects

Add Project

Batch Management

Work Allocation

Data Capture

Reports

Project Status

Productivity Report

My Productivity

Manage Users

Control panel

+ Add Users

Show

10

entries

Search


Name	User	Vendor Name	Role	Status	Action
Jim Krick	jimk	Zelite Solutions	Manager	Active	
Eli Hansen	elih	Mass Corp	Entry User	In-Active	

Showing 1 to 2 of 2 entries

Previous

1

Next

- On click of Create User button, new page will open to add new user.
- This  icon will allow admin to update user information, change the status and role.
- Search option will allow admin to search the user by name.
- Alphabetically sorting available for all columns

Add User

L

LOGO

Photo

User Name

Dashboard

>

User Management

>

Vendor Profile

Manage User

Manage Projects

>

Add Project

Batch Management

Work Allocation

Data Capture

Reports

>

Project Status

Productivity Report

My Productivity

Add Users

Control panel

Select Role*

Select One

Select Vendor*

Select One

Employee Name*

Input Field

User Name*

Input Field

Password*

Password Field

Re-Type Password*

Password Field

Status*

☐ Active
 ☐ In-Active

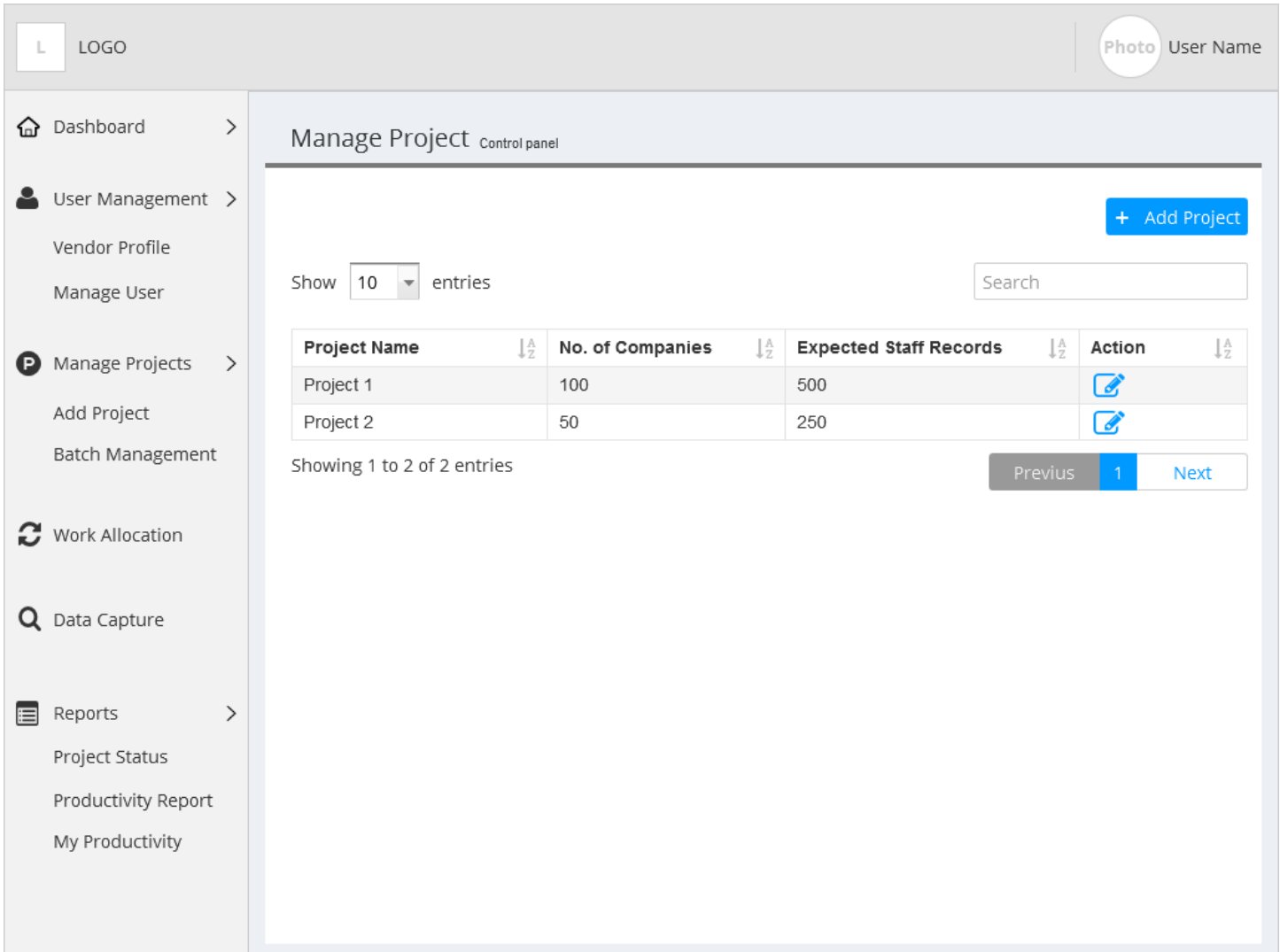
Save

Cancel



- Select Role type (Vendor Admin, Project Manager, Entry User)
- Select the Vendor – will have list of vendors
- Enter the employee full name (First Name , Last Name)
- User name can be alphanumeric value.
- Password and Re-Type password, validation will be triggered if both fields values are not matching.
- While creating a new user status is default active, only update action will show active, in-active buttons.

7.2. Manage Projects


7.2.1. Add Project



The screenshot displays the 'Manage Project' control panel. On the left is a sidebar with navigation links: Dashboard, User Management (with sub-links Vendor Profile and Manage User), Manage Projects (with sub-links Add Project and Batch Management), Work Allocation, Data Capture, and Reports (with sub-links Project Status, Productivity Report, and My Productivity). The main content area is titled 'Manage Project Control panel'. It contains a '+ Add Project' button in the top right. Below this is a search bar and a 'Show 10 entries' dropdown. A table lists two projects:

Project Name	No. of Companies	Expected Staff Records	Action
Project 1	100	500	
Project 2	50	250	

Below the table, it says 'Showing 1 to 2 of 2 entries'. At the bottom right of the table area are navigation buttons: 'Previous', '1' (highlighted), and 'Next'.

- On click of add project button, new page will open to add new project.
- This  icon will allow admin to update Project information, change the status and assign roles.
- Search option will allow to search the vendor by name.
- Alphabetically sorting available for all columns.

Add Project

L

LOGO

Photo User Name

Dashboard >

User Management >

Vendor Profile

Manage User

Manage Projects >

Add Project

Batch Management

Work Allocation

Data Capture

Reports >

Project Status

Productivity Report

My Productivity

Add Project Control panel

Project Name*

Input Field

No of Companies*

Input Field

Expected Staff*

Input Field

Start Date*

DD/MM/YYYY

End Date*

DD/MM/YYYY

Task Brief*

Save

Cancel

- Enter the project name – it can be system generated
- No. of companies in the list
- Expected staff to be captured
- Project Start date and project end date of the project
- Task brief would be a research project instructions.

7.2.2. Batch Management

L

LOGO

Photo

User Name

Dashboard

User Management

Vendor Profile

Manage User

Manage Projects

Add Project

Batch Management

Work Allocation

Data Capture

Reports

Project Status

Productivity Report

My Productivity



Batch Management

Control panel

+ Create Batch

Show 10 entries

Search



Project	Batch	Vendor	No. of Com.	Status	Action
Project 1	Batch 1	Zelite Solutions	100	Assigned	
Project 2	Batch 2	Mass Corp	500	In-Process	
Project 3	Batch 3	Zelite Solutions	50	Completed	

Showing 1 to 2 of 2 entries

Previous

1

Next

- On click of add batch button, new page will open to add new batch.
- This  icon will allow admin to update batch information.
- This  will allow to download output for completed batches.
- Search option will allow to search the batch by name.
- Alphabetically sorting available for all columns.

Create & assign Batch

L

LOGO

Photo User Name

Dashboard >

User Management >

Vendor Profile

Manage User

Manage Projects >

Add Project

Batch Management

Work Allocation

Data Capture

Reports >

Project Status

Productivity Report

My Productivity

Create Batch Control panel

Select Project*

Select One

Batch Name*

Input Field

Assign to*

Select One

Target Date*

DD/MM/YYYY

Upload*

Select File


Upload


Save

Cancel

- Select a project and batch name from the dropdown
- Select the vendor to assign the batch
- Date picker for assign target date to the respective batch
- Browse and upload the input excel file – system will check the template format before uploading it.

7.3. Work Allocation

 LOGO

 User Name

Dashboard >

User Management >

Vendor Profile

Manage User

Manage Projects >

Add Project

Batch Management

Work Allocation

Data Capture

Reports >

Project Status

Productivity Report

My Productivity

Work Allocation Control panel

Select Batch

Select User

Enter No. of Records

Assign


Cancel

Total no. Company

Unassigned Company

Show 10 entries

Search


Batch Name	Sub-Batch	User	Cmpanies		Status	Action
Batch 1	Batch 1_1	Jlm Krick	10	10/02/2017 07.00	Assigned	
Batch 2	Batch 2_1	Eli Hansen	30	11/02/2017 13.00	Completed	
Batch 3	Batch 3_1	Jlm Krick	50	12/02/2017 16.00	In-Process	

Showing 1 to 2 of 2 entries

previous

1

Next

- Select batch name, user and number of records to be allocated.
- This  icon will allow user to update work allocation, only for the assigned sub-batches.
- Search option will allow user to search the batch/sub-batch by name.
- Alphabetically sorting available for all columns.
- Once we select the specific batch, system will show the total companies along with the unassigned records/companies.

7.4. Data Capture

LOGO

User Name

Dashboard >

User Management >

Vendor Profile

Manage User

Manage Projects >

Add Project

Batch Management

Work Allocation

Data Capture

Reports >

Project Status

Productivity Report

My Productivity

Allocated Batches Control panel

Show entries

Batch Name <small>↓ A Z</small>	No. of Com. <small>↓ A Z</small>	Allocated on <small>↓ A Z</small>	Project Brief <small>↓ A Z</small>	Status <small>↓ A Z</small>	Action
Batch 1	10	10/02/2017 07.00		Assigned	
Batch 2	30	11/02/2017 13.00		Completed	
Batch 3	50	12/02/2017 16.00		In-Process	

Showing 1 to 2 of 2 entries

previous
1
Next

- This button will allow user to start working on data capture. It will open another screen to start data entry.
- This icon allow user to view project brief.
- Alphabetically sorting available for all columns.

7.4.1. Entry Screen

Web Site Name

http://www.yoursite.com

Search...

Tab Name

+ Add Child Record

Project Brief

Company Data

Save

+ Add New Record

First Name	Last Name	Email	Designation	Action
Staff First 1	Staff Last 1	Staff1@company.com	Manager	
Staff First 2	Staff Last 2	Staff2@company.com	Head	
Staff First 3	Staff Last 3	Staff3@company.com	CEO	

Submit

- a. Project brief will show popup with project instructions.
- b. Add child record: there will be an additional field along with the company name called "Child Company", the field will get editable once we click on 'Add Child record button'
- c. Save button will save the company information.
- d. Add new records will open a pop up (ref. 6.4.3) to add staff record, same pop will open to update the staff records.
- a. On click of submit button, company information and staff records will be finally submitted.

Add New Record

First Name*	<input type="text"/>	Middle Name	<input type="text"/>
Last Name	<input type="text"/>	Email	<input type="text"/>
ISD Code	<input type="text"/>	Are Code	<input type="text"/>
Phone	<input type="text"/>	Alternate Phone	<input type="text"/>
Designation*	<input type="text"/>		
Staff Note	<div><div></div></div>		
		<input type="button" value="Save"/>	<input type="button" value="Cancel"/>

7.4.2. Dedupe Checking

System will check the duplicate record while entering the data. The system will check the entry within the batch and/or in the database where the previous batches are exists. The data duplication logic will be provided by Eli.

7.5. Reports

7.5.1. Project Status Report

L

LOGO

Photo User Name

Dashboard >

User Management >

Vendor Profile

Manage User

Manage Projects >

Add Project

Batch Management

Work Allocation

Data Capture

Reports >

Project Status

Productivity Report

My Productivity

Project Status Report Control panel

Select Project

Select Vendor

Select Batch

Get

Show 10 entries

Project Name	Vendor Name	Batch Name	No. Of Companies	No. of Staff	Status

Showing 1 to 2 of 2 entries


Previous


1

Next

- a. Dependent Drop down option for project, vendor and batch name. On click of get report will be shown in grid.

7.5.2. Productivity Report

 LOGO

 User Name

Dashboard >

User Management >

Vendor Profile

Manage User

Manage Projects >

Add Project

Batch Management

Work Allocation

Data Capture

Reports >

Project Status

Productivity Report

My Productivity

Productivity Report Control panel

Select Project

Select Vendor

Select User

Date From - DD/MM/YYYY

Date To - DD/MM/YYYY

Get

Show 10 entries

Vendor	User	No. Companies	No. Staff	Staff Email	Spent Hrs.	Approve Hrs.

Showing 1 to 2 of 2 entries

Previous

1

Next

- The dropdown options will be shown based on the user role and associated permissions.
- Entry user can view his/her own productivity – the selection of dropdown ‘project, vendor & user’ will be disabled for this user.
- Project manager can see the vendor specific report, whereas vendor admin can see the report of all vendors.