Functional Requirement Specification Document

For

CRM Application Development for Research

Submitted to

Eli India

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Submitted by

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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 then 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

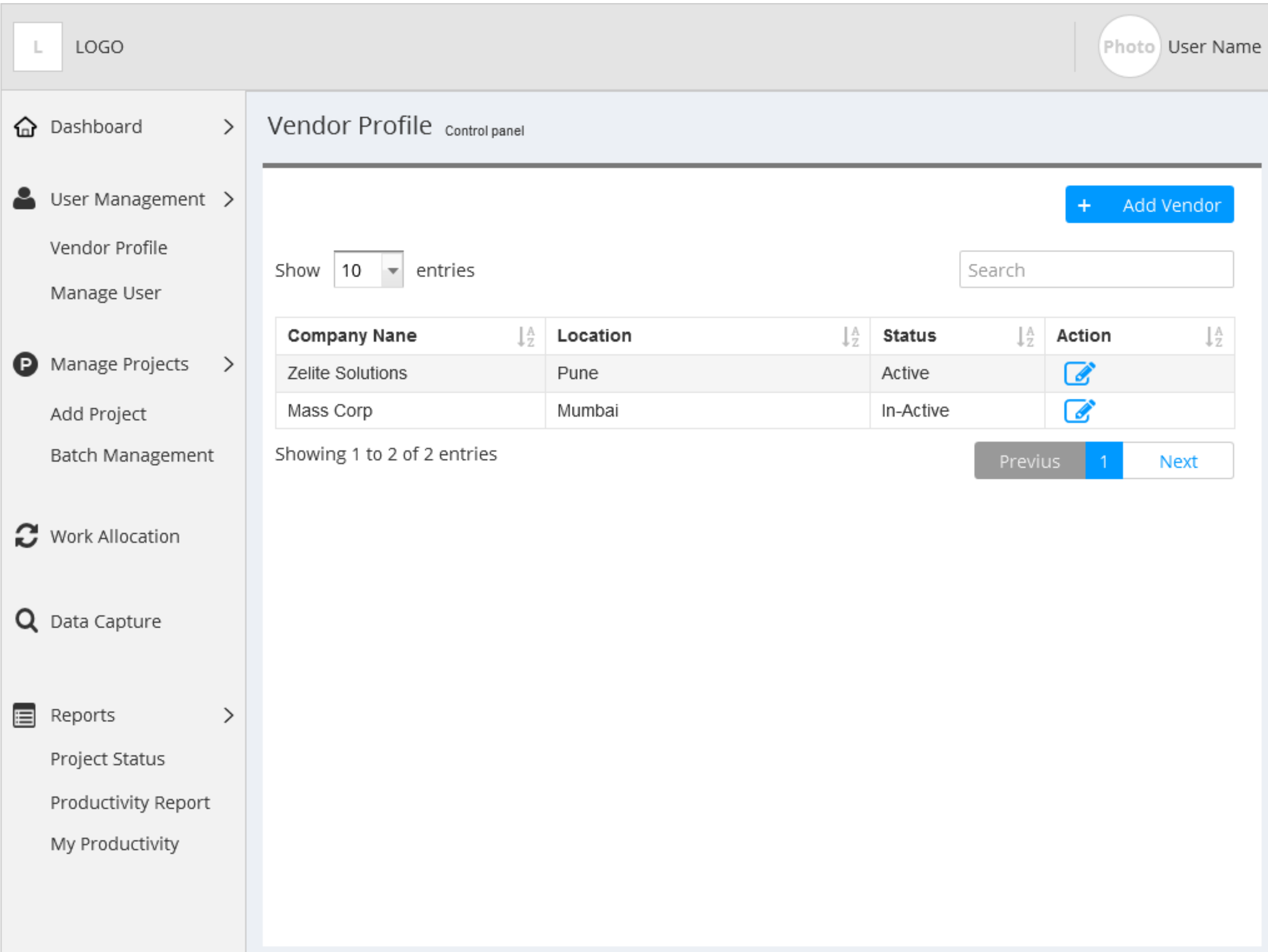
Researcher will have permissions to enter the data into the data entry application screen. The user can view his/her own productivity.

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.

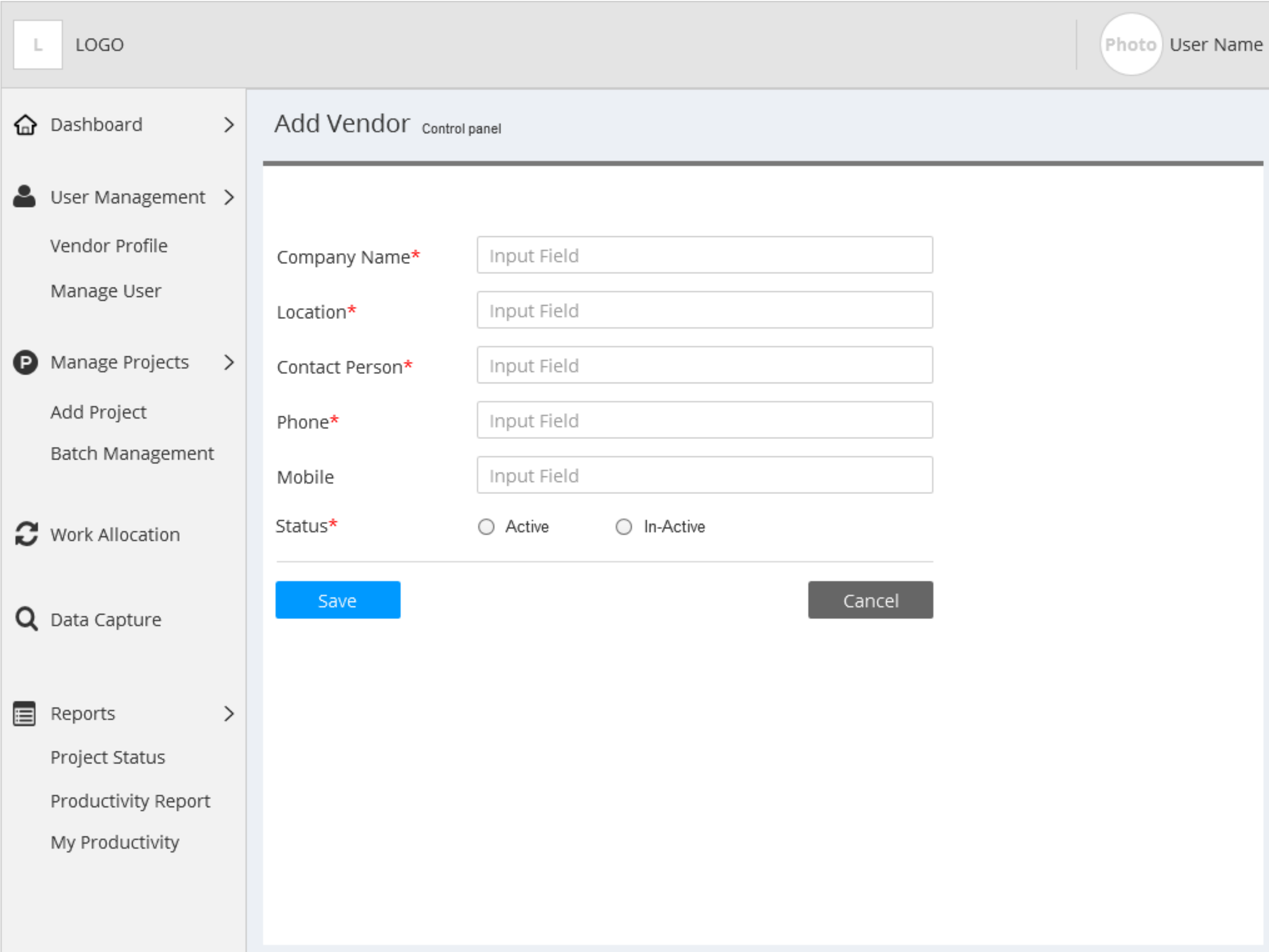
7.1. User Management

7.1.1. Vendor Profile



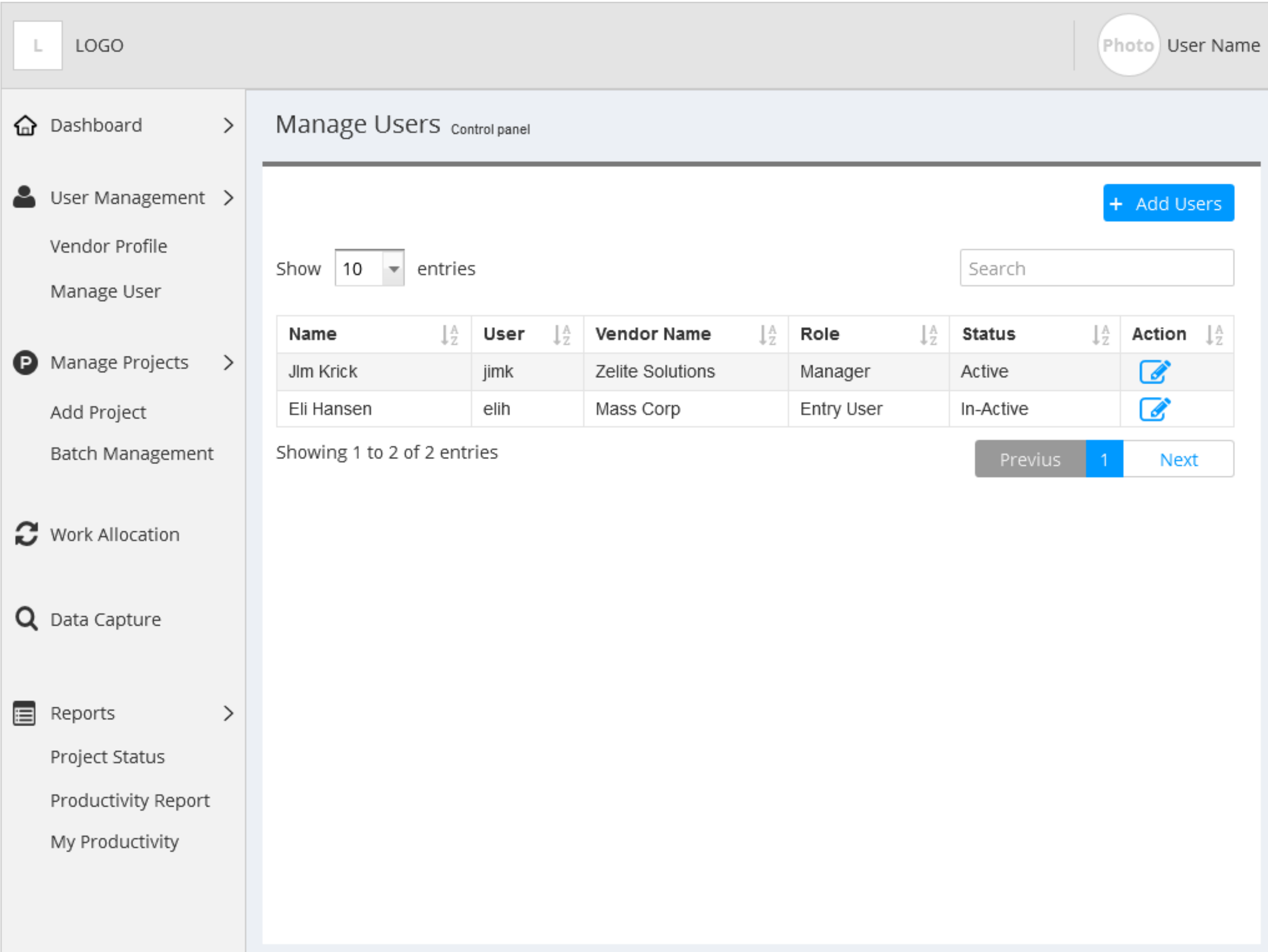
a. On click of Create Vendor button, new page will open to add new vendor.
b. This icon allow admin to update vendor information, change the status and roles.
c. Search option allow user to search the vendor by name.
d. Alphabetically sorting available for all columns

Add Vendor



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

7.1.2. Manage Users



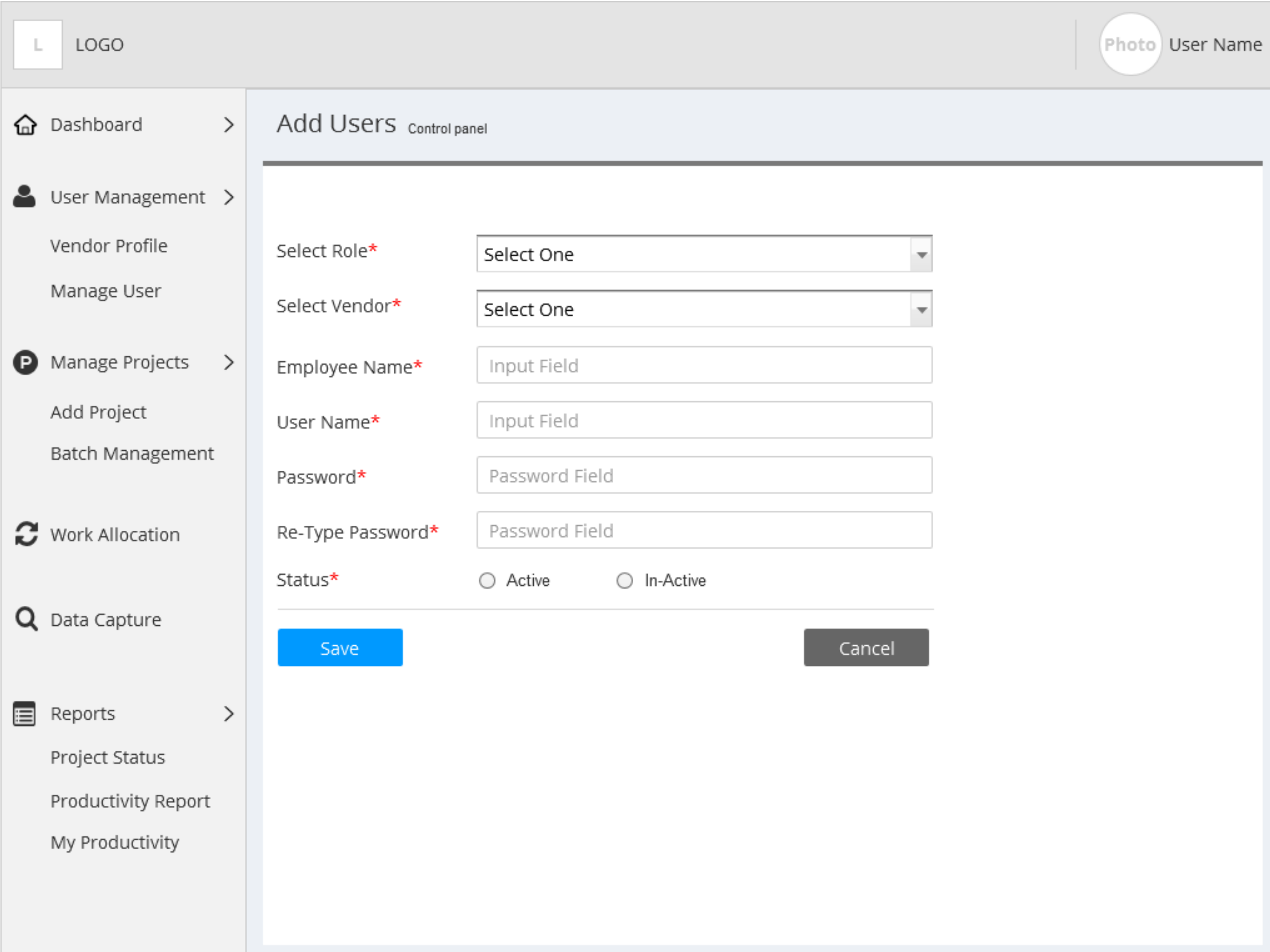
a. On click of Create User button, new page will open to add new user.

b. This icon will allow admin to update user information, change the status and role.

c. Search option will allow admin to search the user by name.

d. Alphabetically sorting available for all columns

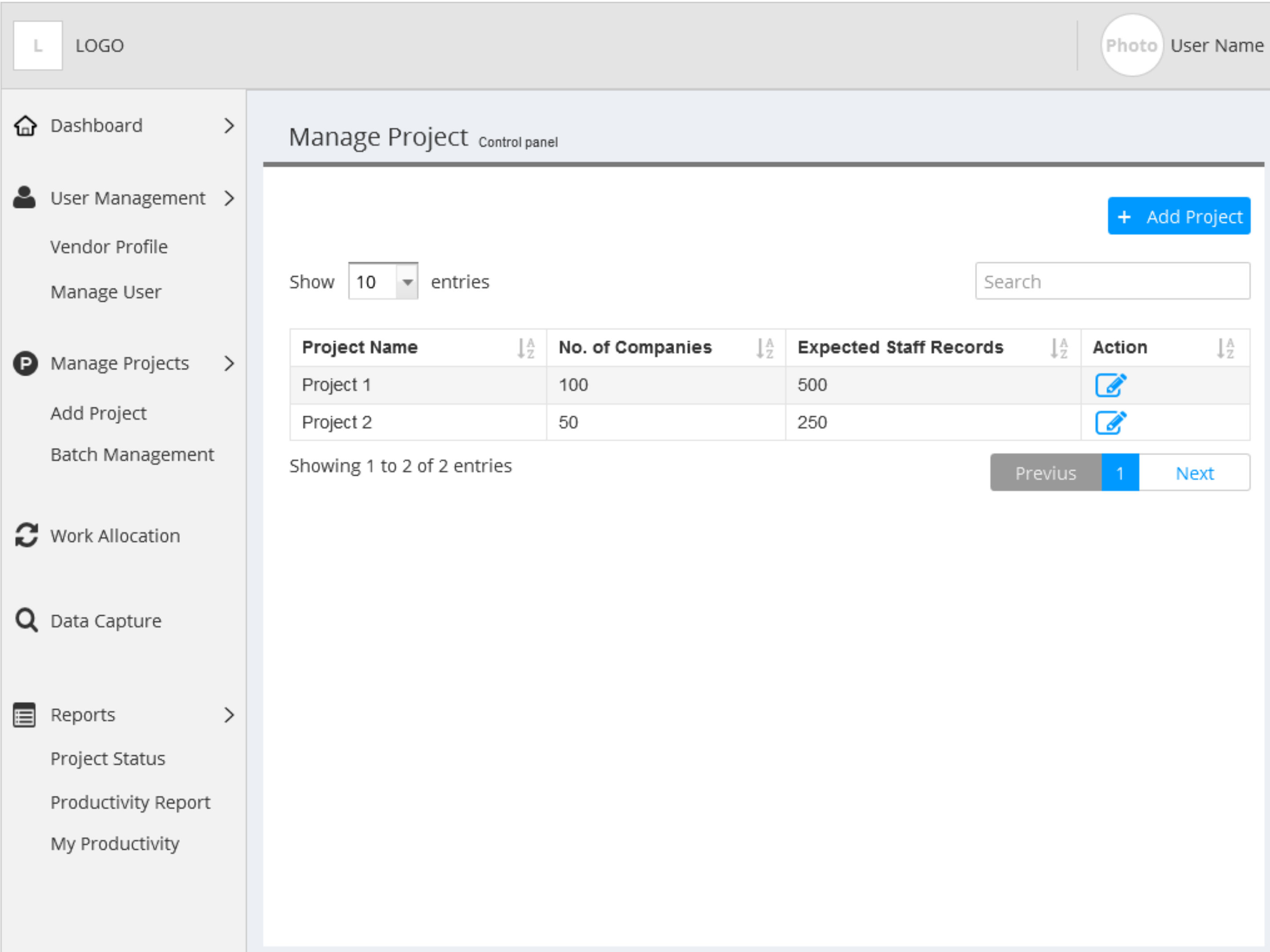
Add User



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

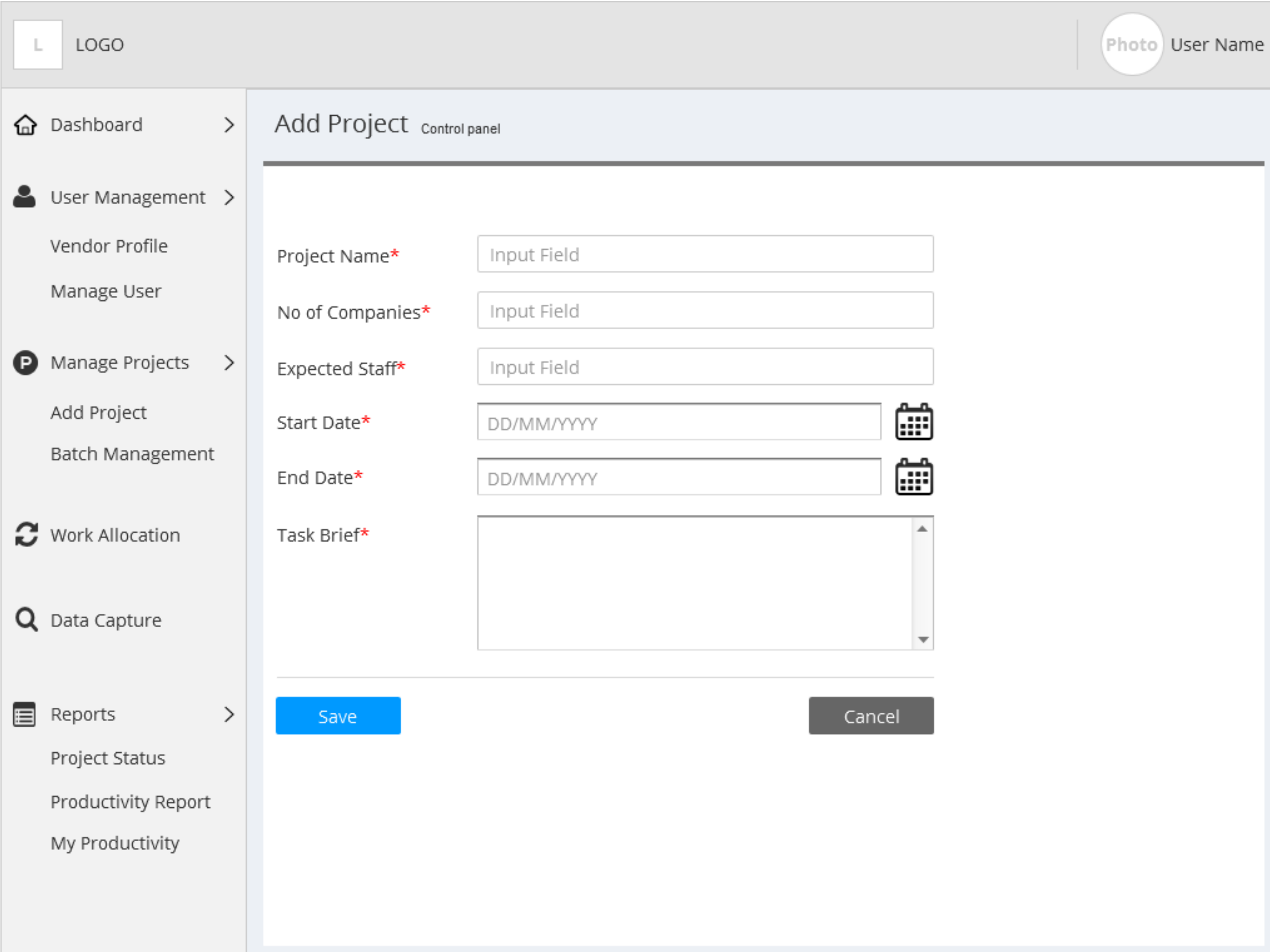
7.2. Manage Projects

7.2.1. Add Project



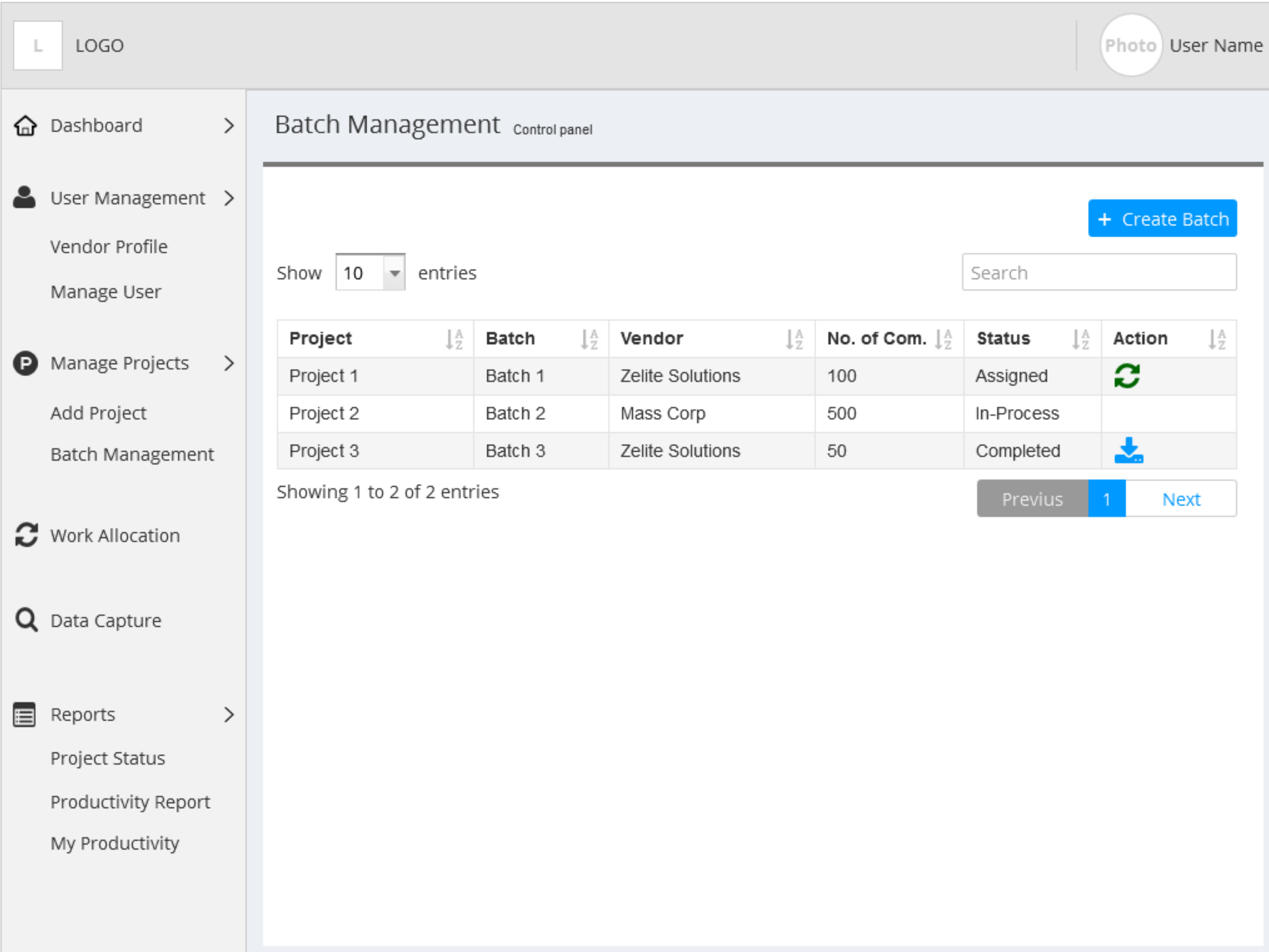
a. On click of add project button, new page will open to add new project.
b. This icon will allow admin to update Project information, change the status and assign roles.
c. Search option will allow to search the vendor by name.
d. Alphabetically sorting available for all columns.

Add Project



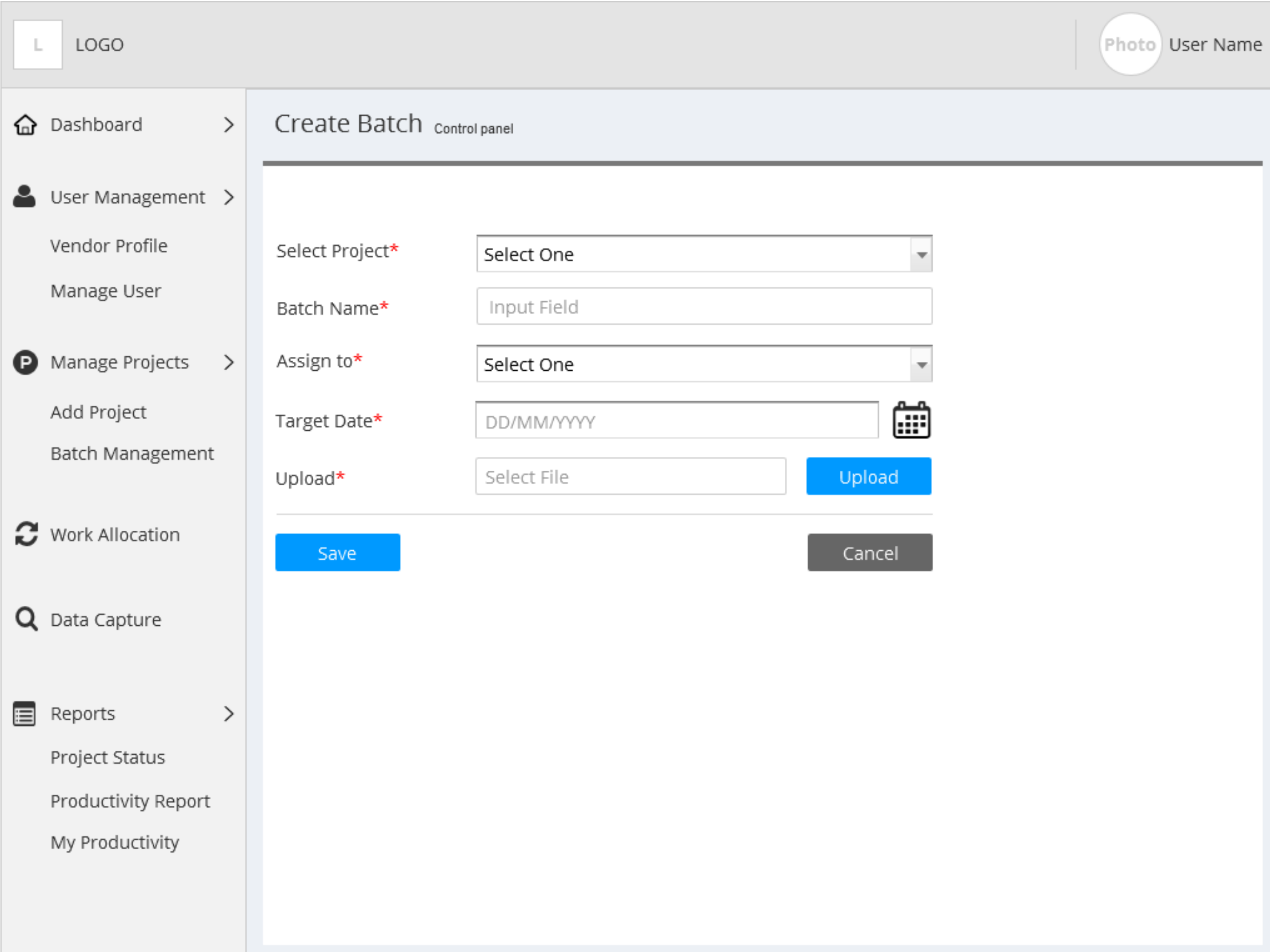
a. Enter the project name – it can be system generated
b. No. of companies in the list
c. Expected staff to be captured
d. Project Start date and project end date of the project
e. Task brief would be a research project instructions.

7.2.2. Batch Management



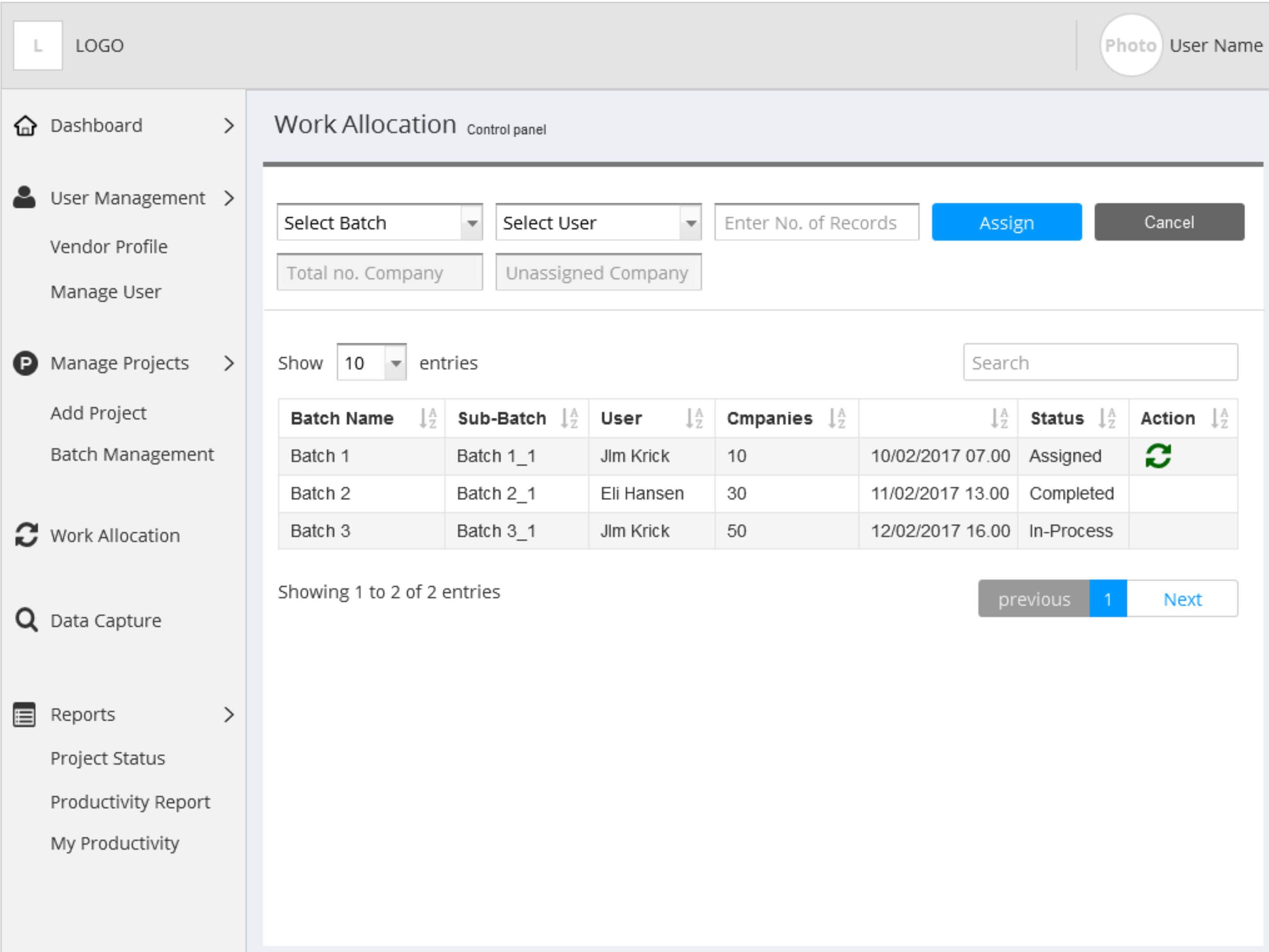
a. On click of add batch button, new page will open to add new batch.
b. This icon will allow admin to update batch information.
c. This will allow to download output for completed batches.
d. Search option will allow to search the batch by name.
e. Alphabetically sorting available for all columns.

Create & assign Batch



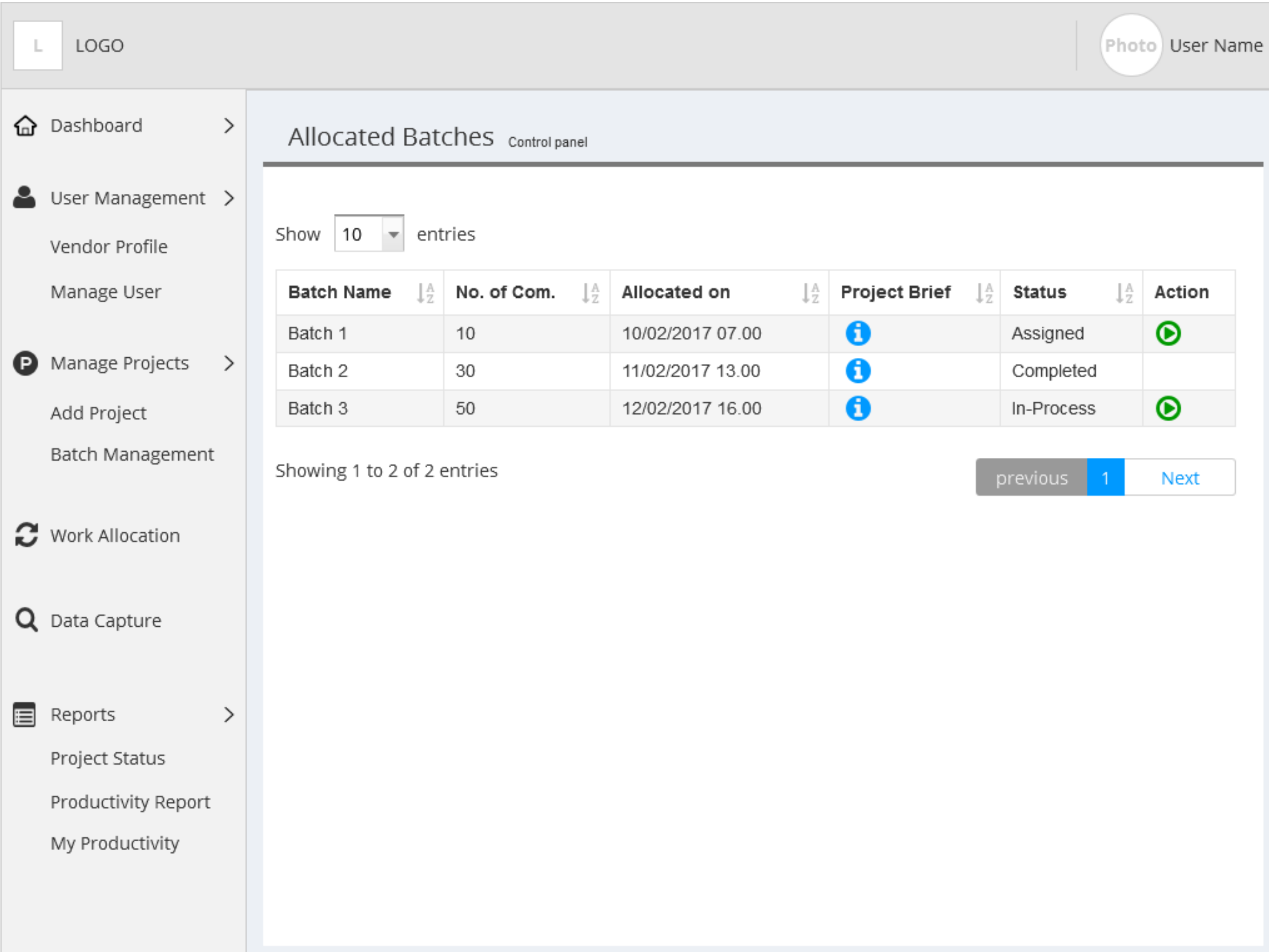
a. Select a project and batch name from the dropdown
b. Select the vendor to assign the batch
c. Date picker for assign target date to the respective batch
d. Browse and upload the input excel file – system will check the template format before uploading it.

7.3. Work Allocation



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

7.4. Data Capture

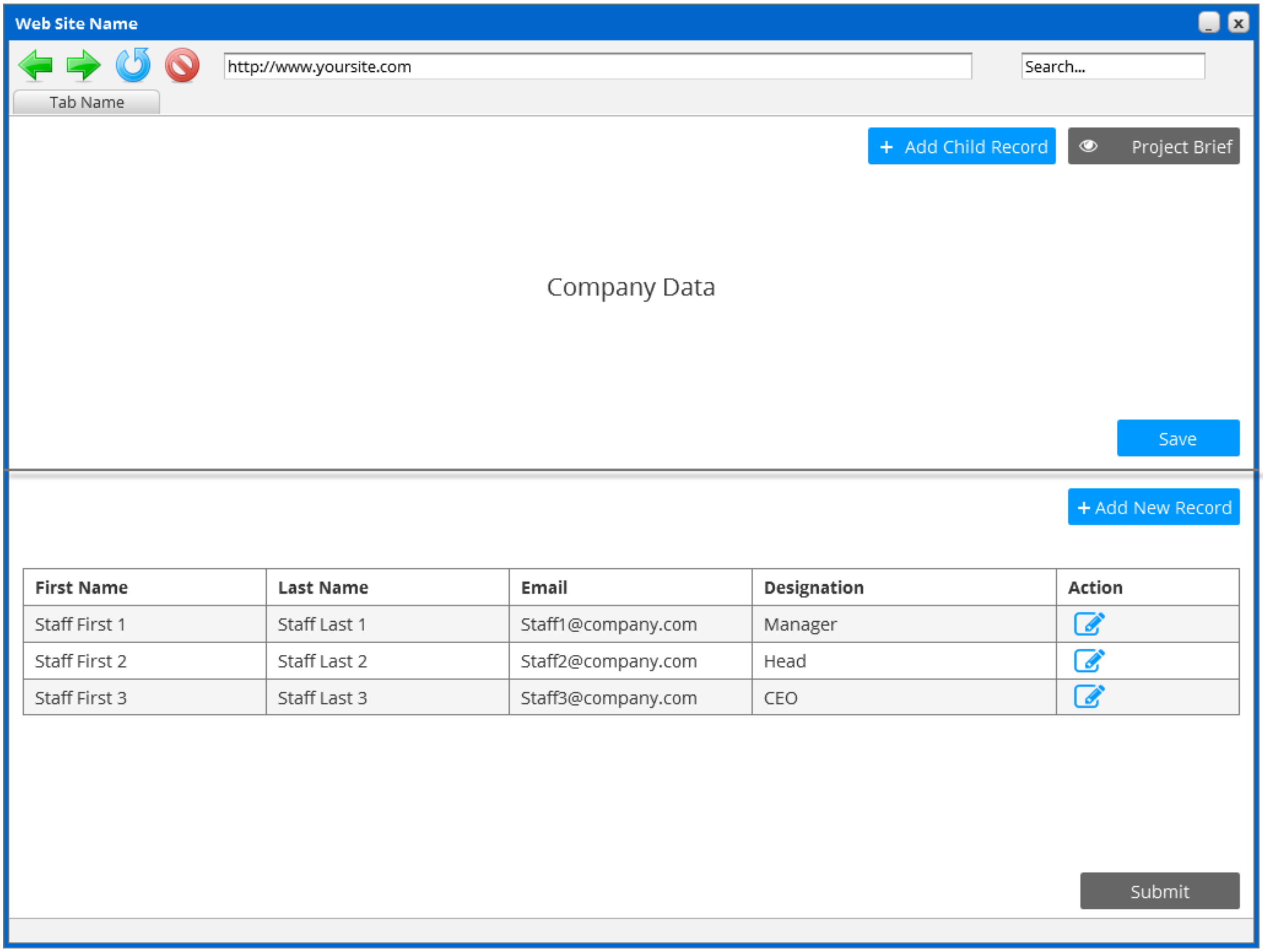


a. This button will allow user to start working on data capture. It will open another screen to start data entry.

b. This icon allow user to view project brief.

c. Alphabetically sorting available for all columns.

7.4.1. Entry Screen



a. Project brief will show popup with project instructions.

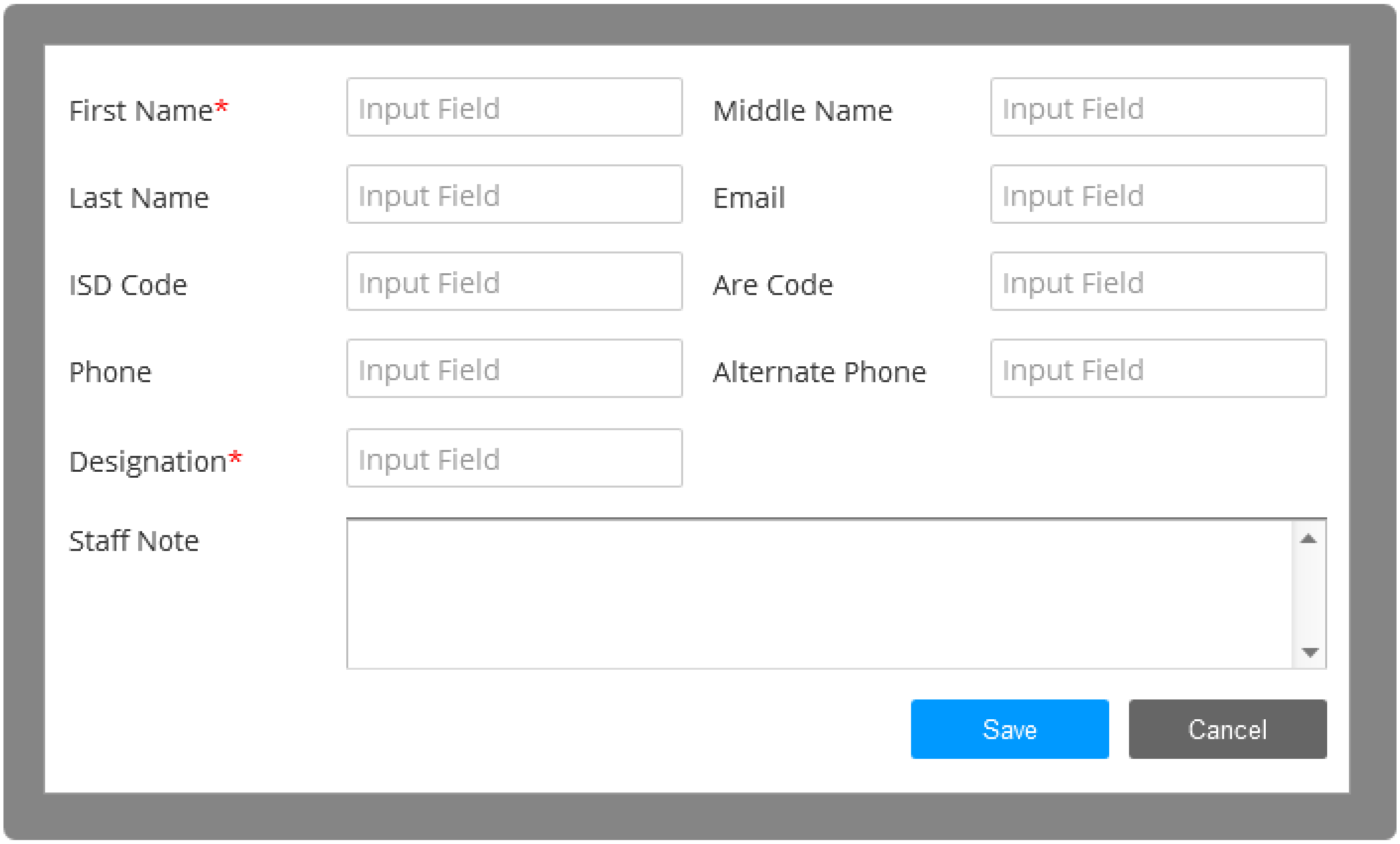
b. Add child record: there will be an additional field along with the company name called “Child Company”, the field will get editable once we click on ‘Add Child record button’

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

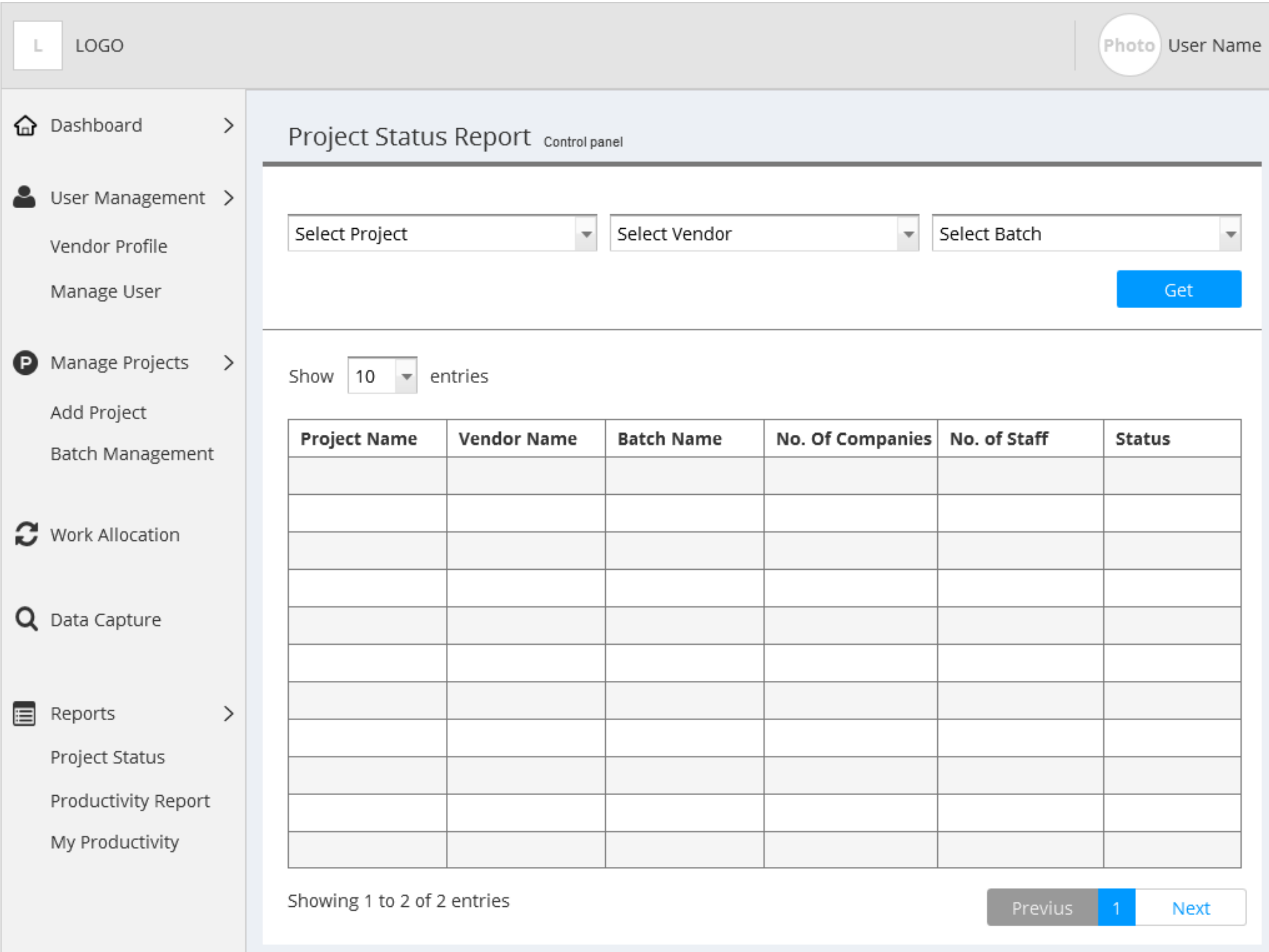


7.4.2. Dedupe Checking

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.

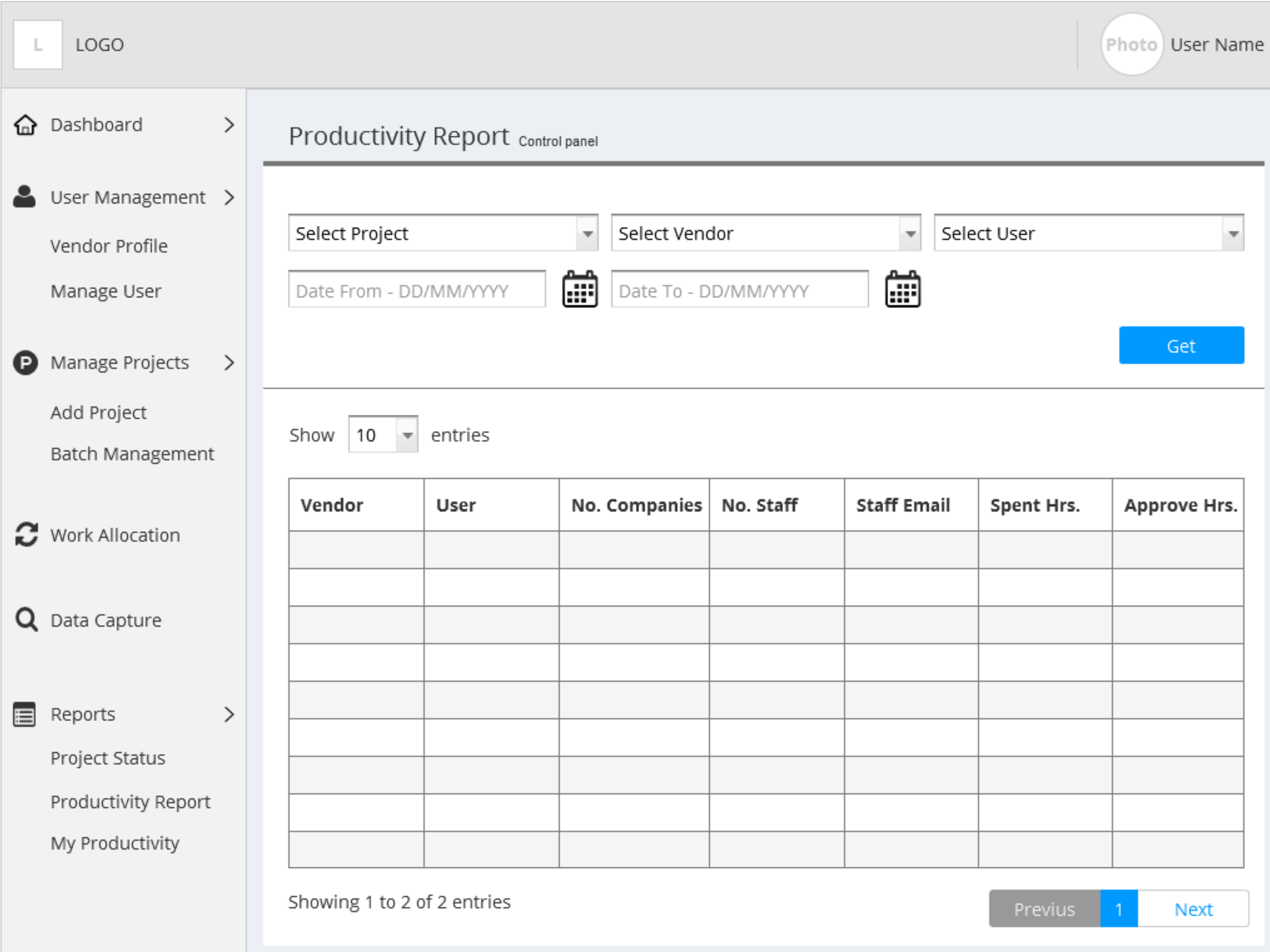
7.5. Reports

7.5.1. Project Status Report



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



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