**Educational Society Management System (ESMS)**

The ESMS is typically a web-based system to enable pages render well on a variety of devices and window or screen sizes.  Basically, the ESMS help to manage the activities and services of an educational society that provides free scholarships and loan-based help to financially weak students to pursue their higher education. This educational society is governed by a President, Vice Presidents, Executive committee members, Lifetime members, general body members. In addition to sponsors, the members are the main financial source for the educational society to cover up all its expenses. The main purpose of designing the ESMS is to record the details of all users (members), sponsors and their donations, subscriptions, loan payment/repayment and scholarship details. The other intended ideas are to digitize all activities of the IQRA educational society to speed up the communications, processing time and most importantly a transparent organization to all allowstakeholders.

Functionalities where the system shall provide are:

In addition to a web-based system, a mobile app is also required with very limited functionalities which might include the details like user profile and message board features.

# Home screen

* A very attractive home screen with the standard and typical features for a web portal having sections related to educational society
* Here is where the news, events, messages, advertisements, download, etc., will appear
* Bootstrap carousel images to be displayed with short text message and a link to redirect user to particular page for more details.

# User Management

* Only the administrator can manage the users.
* Clicking this option should display all user records in a tabular list with minimum details like Profile picture, Member name, Member type, Status
  + **Please provide Member type details**
* Have an option to create new user. When this option is selected, admin should be able to create user profile with a temporary username and password.
* Clicking on a particular user name should display his/her profile information where the system should allow administrator to modify all details except username and password.
* Searchable text fields (Member name, Residing country, Last subscription year, Membership type, Street)
  + **Membership type is same as member type?**

# Login

* Standard login screen
* When administrator login to the system, the admin panel should be displayed with all his features.
* For other users, iffirst time, the system should force the user to change his temporary username and password and fill other mandatory details (see my profile below). Once completing the forceful change, the current user session should be invalidated and the login screen should be displayed again to allow user to login with his permanent username and password.

# MyProfile

User is allowed to

* View and update his profile information except username.
* View his complete subscription details with date of payment

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field #** | **Field name** | **Required** | **Data type** | **Input by** |
|  | Username | Yes | String | Member |
|  | Password | Yes | String | Member |
|  | Profile picture | Yes | Image | Member |
|  | Member name | Yes | String | Member |
|  | Date of birth | No | Date | Member |
|  | Door number | Yes | String | Member |
|  | Street name | Yes | String | Member |
|  | Communication address | Yes | String | Member |
|  | Qualification | No | String | Member |
|  | Occupation | No | String | Member |
|  | Mobile number | Yes | String | Member |
|  | Landline number | No | String | Member |
|  | Email | No | String | Member |
|  | Residing country | Yes | String | Member |
|  | Last subscription year | No | Date | Admin |
|  | Last subscription amount | No | Number | Admin |
|  | Membership type | No | String | Admin |
|  | Member since | No | Date | Admin |
|  | User type | No | String | Admin |
|  | Status | No | String | Admin |

# Message board

User is allowed to

* send message to admin, view response message from admin
* view messages like meeting requests, event details, any other messages sent by admin
  + **Please share communication media – Email/SMS/Social media** 
    - **Email is our suggestion**
* acknowledge messages which expects response by admin with comment section describing the reason incase can’t attend to the event or meeting.

# ScholarshipDetails List

* Only administrator has the permission to add/edit the student’s scholarship details
* Clicking this option should display all scholarship records in a tabular list with minimum details like Application type, Student name, Profile picture, Course type, Approved year.
  + **Provide more details about Application type and Course type**
* Have an option to create new scholarship details. When this option is selected, admin should be redirected to scholarship data entry screen page.
* Clicking on a particular scholarship record should redirect to scholarship data entry screen with all available details.
* Clicking on a column header should sort the data and redisplay the entire list.
* Searchable fields (Student name, Approved year, Course completed year, Application type, Course type, Payment on hold, Repayment completed year)

# ScholarshipData Entry

* Not all fields are filled at same time. Most of the fields are filled during update.
  + **Let me know what are all the fields are required on ADD?**
* For Array,the front-end screen should provide administrator a dynamic feature to add extra rows.
* When Zakaath amount is specified, the entered amount should be subtracted in ZakaathFunddatabase table with existing fund
* **Are we link scholarship and sponsor or sponsor amount will be share to fund and then it will be share internally** 
  + **Can one scholarship have multiple sponsors If yes how can it be mentioned in scholarship details**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field #** | **Field name** | **Required** | **Data type** | **Array** |
|  | Application Date | Yes | Date | No |
|  | Application type | Yes | String | No |
|  | Student name | Yes | String | No |
|  | Profile picture | Yes | Image | No |
|  | Date of birth | Yes | Date | No |
|  | Gender | Yes | String | No |
|  | Door number | Yes | String | No |
|  | Street name | Yes | String | No |
|  | Mobile number | Yes | String | No |
|  | Landline number | No | String | No |
|  | Email | Yes | String | No |
|  | Course type | Yes | String | No |
|  | College name | Yes | String | No |
|  | Name of the course | Yes | String | No |
|  | Address of the college | Yes | String | No |
|  | Approved amount | Yes | Number | No |
|  | Zakaath amount | No | Number | No |
|  | Years Sponsored | Yes | Number | No |
|  | Approved year | Yes | Date | No |
|  | Supporting documents | Yes | Blob | Yes |
|  | Scanned copy of application | Yes | Blob | No |
|  | Remarks | No | String | Yes |
|  | Payment on hold | No | String | No |
|  | Course completed year | No | Date | No |
|  | Repayment completed year | No | Date | No |
|  | HasRepayments | No | String | No |

# SponsorDetails List

* Only administrator has the permission to add/edit the sponsor details
* Clicking this option should display all sponsor records in a tabular list with minimum details like Sponsor name, Profile picture, Street name Residing country.
* Have an option to create new sponsor details. When this option is selected, admin should be redirected to sponsor data entry screen page.
* Clicking on a particular sponsor record should redirect to sponsor data entry screen with all available details.
* Clicking on a column header should sort the data and redisplay the entire list.
* Searchable fields (Sponsor name, residing country, for year, Paid)

# SponsorData Entry

* Not all fields are filled at same time. Commitments fields are filled during update.
  + **Let me know what are all the fields are required on ADD?**
* For Array, the front-end screen should provide administrator a dynamic feature to add extra rows.

|  |  |  |  |
| --- | --- | --- | --- |
| **Field #** | **Field name** | **Required** | **Data type** |
| 1 | Sponsor name | Yes | String |
| 2 | Profile picture | Yes | Image |
| 3 | Door number | Yes | String |
| 4 | Street name | Yes | String |
| 5 | Mobile number | Yes | String |
| 6 | Landline number | No | String |
| 7 | Email | Yes | String |
| 8 | Residing country | Yes | String |
| 9 | Commitments | No | Array |
| 9.1 | For year | Yes | Date |
| 9.2 | Amount | Yes | Number |
| 9.3 | Paid | Yes | String |
| 9.4 | Receipt no | No | Number |

# Receipt Details List

* Only administrator has the permission to add/edit the receipt entries
* Clicking this option should display all receipt records in a tabular list with minimum details like Name, Profile picture, Receipt type, Year.
  + **Please provide more details about Receipt type**
* Have an option to create new receipt details. When this option is selected, admin should be redirected to receipt data entry screen page.
* Clicking on a column header should sort the data and redisplay the entire list.
* Searchable fields (Receipt date, Receipt type, Name, For year)

# Receipt Data Entry

* Following are the receipt types shall be given in dropdown box. These values should be fetched from ReceiptTypedatabase table.
* Subscription
  + **Need more details subscription plan – year, month etc**
* Donation
* Scholarship
* Repayment
* Zakaath

|  |  |  |  |
| --- | --- | --- | --- |
| Field # | Field name | Field type | To be considered |
| 1 | Receipt date | Date | By default, current date is displayed |
| 2 | Receipt type | Dropdown | Values to be fetched from receipt type database table |
| 3 | Name | Dropdown | * Depending upon the receipt type the names should be fetched from corresponding database table * If receipt type is   + Subscription (fetch name from User)   + Donationor Zakaath (fetch name from Sponsor)   + Scholarship or Repayment (fetch from Scholarship) |
| 4 | Profile picture | Display | * Profile picture of the selected name should be displayed after selecting the name in previous field   Reason: To ensure the receipt is generated for correct person. |
| 5 | Amount | Text | * When receipt type is Zakaath, the entered amount should be updated in ZakaathFund collection with existing fund |
| 6 | For year | Date | * Field is enabled or shown only for Subscription, Donationand Scholarship receipts * For Subscription receipt, the last subscription year field in Userdatabase table should be updated with this date when submitting the form. |
| 7 | Cancelled | Text | If Cancelled is ‘Yes’, the amounts should be adjusted accordingly |
| 8 | Cancelled reason | Text |  |
| 9 | Remarks | Text |  |

# Petty cash

* Only administrator has the permission to add/edit the cash personal details
* Searchable fields (Transaction date)
* **Could you like to manage balance sheet, or sinple cash in and out flow only**

|  |  |  |  |
| --- | --- | --- | --- |
| **Field #** | **Field name** | **Required** | **Data type** |
| 1 | Transaction date | Yes | Date |
| 2 | Detail | Yes | String |
| 3 | Cash In | No | Currency |
| 4 | Cash Out | No | Currency |

# Image, news, events, message and content settings

This functionality should be provided for administrator to add/update/delete images, news, events, messages and contents.

An UI screen to be provided upload images for slideshow (Bootstrap carousel). Similarly, in many pages/sections the images and its contents may be loaded from file server or database and displayed in the corresponding sections.

* **Could you like to manage front end screen – like cms**

When a page is reloaded/refreshed, new/updated images and contents should appear.

# Reports

All reports should have an option to export the data in PDF/Excel file.

## Subscription pending (User database table is used here)

* Provide two text fields to accept year and country to search users whose last subscription year is less than user entered/specified year for that country. If country is specified, show users belongs only to that country. If country is not specified, then show users belongs to all countries. This query should exclude particular membership type (“Lifetime member”) from the query.

## Sponsor:

* + Sponsor profiles
  + Year wise, country-wise
  + Payment due by year-wise

## Loan Repayment:

* + Student profiles with complete repayment details
  + Course type and completed year
  + Summary of loan amount and repayments by year-wise

# Dashboard screen

* A nice dash board should be designed. The dash board should have the graphical and textual representation of important details.

# Design considerations: - We will share mockup / Theme link for UI confirmation

* Data table/grid style component should be used when displaying details for all list screens.
* List screens should provide pagination feature
* Add/Modify/Delete operations should make corresponding changes in Database and in data table/grid as well.
* Clicking on a column header should sort the data and redisplay the entire list.
* Create New button should be provided in all List screens
* Delete/modify/view options should be provided in each row of the data list as icons.
* Search feature should be given to filter list of records based on field inputs
* Clicking Create Newbutton should redirect to separate page to accept the values. As soon as the new details are submitted, the user should be redirected back to list screen which should now display the newly added record also.
* Clicking modify icon should display the selected row details on a separate page enabling all fields are editable. As soon as submit is clicked, the user should be redirected back to list screen which should now display the row with updated details.
* Clicking view icon should display the selected row details on a separate page disabling all fields are noneditable. Clicking on document/image field should display the corresponding document/image.
* Clicking delete icon should ask for confirmation before deleting the row in data grid.
* Clicking cancel button in any screen should redirect to its corresponding list screen.
* Download As PDF/Excel and Print option should be provided in all front-end screens
* Pages should be designed based on the best color combination with our logo

# Following are readily provided

* Database table models with relationships will be provided. **- Dependency Items**
* Our logo**- Dependency Items**

# What we expect from vendor

* Quality of work, standard code and best practices
* Always reachable through email/chatting with immediate response
* Dynamic and logically drive the project with right approach
* Test files for all backend services should be provided with complete details including sample data. For example, Post man scripts for REST services
* Should also give simple document explaining how to update/build/deploy/run project locally
* Should provide Database table sample data
* Highly flexible in making changes if really required and for project necessity.

# *Technologies we are going to Use*

**Admin Panel**

* Codeigniter framework with HMVC architecture (PHP)
* Angular JS – Front end
* API:REST API controller
* Bootstrap 3,Jquery and HTML5
* Database: Mysql

**Front End**

* **Please confirm the flow**