Software Requirements Specification

For

MySRM

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Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Date** | **Reason for Changes** | **Version** |
| Initial | 2017/09/11 | Initial draft | V0.1 |
| Version 2 | 2017/09/12 | * Updated Startup Attribute list with validation. * Added description for external user. | V0.2 |
| Version 3 | 2017/09/15 | * Incorporated Thibaud’s comments. * Updated Startup Attribute list and Client User attribute list * Added Startup Contact attribute list and logic | V0.3 |

# Introduction

## Purpose & Scope

MySRM is a solution system helping corporations to source, rate and collaborate with startups. It helps corporate employees to take appropriate decisions all along the lifecycle of collaboration between their firm and the startups.

# Feature Description

The application will have two parts:

1. MySRM Module
2. Client Module

## MySRM Module

MySRM module will be used by the admin of MySRM system to manage the clients, startup data and other admin functions. The function are as follows:

### Client Function

MySRM admin will be able to Add/Edit/Disable clients from the system using the CMS. The client will have following attributes associated with them:

Client Attributes:

* Name
* Address
* Email
* Contact
* Users allotted
* Share Startup data
* Startup data shared

Business rules:

* The admin will be able to Create/Edit/Disable clients from the CMS.
* While editing client, the admin will not be able to edit the email field.
* Multiple clients with same email cannot be created.
* If a client is disabled by the admin, none of the users in the client will be able to logon to the system.
* If the Share Startup option for a client is enabled, the startup details currently present in the system will be copied to the client’s DB. The list of copied startups will be stored in the system.
* Once the Share Startup option for a client is enabled, it can’t be disabled and also no new startup can be copied to client DB.

### Startup Function

MySRM admin will be able to Add/Edit/Disable Startup information using the CMS. Startup will have following attributes associated to them:

Startup Attributes (Based on EXCEL provided):

|  |  |
| --- | --- |
| **Field** | **Validation** |
| Company Website | Must be a url |
| Startup Name | Free text |
| HQ | From a standard list of countries |
| Industry | Free text |
| Tech Focus | Refer to list of tags |
| Area of Disruption | Free text |
| Source | Free text |
| Met/Talk | dd/mm/yyyy format |
| Vision | Free text |
| Countries of Activities (Footprints) | From a standard list of countries (mutliple choice possible) |
| Date of Incorporation | dd/mm/yyyy format |
| Address (line 1) | Free text |
| Address (line 2) | Free text |
| Postcode | Free text |
| Country | From a standard list of countries |
| Telephone | International format |
| Email | Must be a valid email format |
| Funding Rounds | Must be either: n/a, Seed, Series A, Series B, Series C, Series D, Series E, Series F, Series G, IPO |
| Backers | Free text |
| Total Funding | Numbers |
| Currency | From ISO list of currencies |
| Model | Must be either: B2B, B2C, C2C, B2B2C, other |

Startup Contact Attributes:

|  |  |
| --- | --- |
| **Field** | **Validation** |
| Name | Free Text |
| Designation | Free Text |
| Email | Valid Email address |
| Contact Number | Valid Phone number |
| Picture | jpg,png |

The Yellow fields are the mandatory fields.

(Note: The attributes will be updated as we go.)

Business rules:

* The admin will be able to Create/Edit/Disable Startup from the CMS.
* Multiple Startups with same Company Website cannot be created.
* If a Startup is disabled by the admin, it will not be included in the copy to Client DB.
* The admin will be able to add the startup contact information later.

### Client User Function

MySRM admin will be able to add users to the client DB using the CMS. The Client user will have following attributes:

Client User Attributes (Based on EXCEL provided):

|  |  |
| --- | --- |
| **Field** | **Validation** |
| email | *email format* |
| First Name | *String of characters* |
| Last Name | *String of characters* |
| Country | *From a defined list* |
| Business Unit | *Free text* |
| Telephone (mobile) | *International format* |
| Telephone (landline) | *International format* |
| *Type of user* | *Admin or Standard* |
| *Area of expertise* | *From list of tags* |

The Yellow fields are the mandatory fields.

(Note: The attributes will be updated as we go.)

Business rules:

* The admin will be able to Create Client User from the CMS.
* Multiple Client User with same Email cannot be created. This is applicable across the system. So, if a user is already present for a client, same user can’t be added to another client.
* If a Startup is disabled by the admin, it will not be included in the copy to Client DB.

### Startup Import

MySRM admin will have access to import module which can be used to bulk import the Startup to the system. The admin will have to prepare an EXCEL(.xlsx) file of provided format to import. The attributes will be the same as defined in “Startup Function”.

Business rules:

* The admin will be able to bulk import Startup from an Excel(.xlsx) file of correct format. The correct format template can be downloaded from the import section itself.
* After the import is complete, admin will be able to see message “'X' records imported, 'Y' records saved, 'Z' records had error, 'M' Records were duplicate.”
* In case of duplicate records, the admin will have an option to overwrite the existing record with that of excel or just ignore it.

### Client User Import

MySRM admin will have access to import module which can be used to bulk import the Client user to the client’s system. The admin will have to prepare an EXCEL(.xlsx) file of provided format to import. The attributes will be the same as defined in “Client User Function” section.

Business rules:

* The admin will be able to bulk import Client User from an Excel(.xlsx) file of correct format. The correct format template can be downloaded from the import section itself.
* After the import is complete, admin will be able to see message “'X' records imported, 'Y' records saved, 'Z' records had error.”
* In case of duplicate records, the duplicate records will be discarded.

### Push Startup data to Client DB

MySRM admin will have access to push the startup data to client’s database. This function essentially copies all the startup information from the main DB and transfers it to the clients DB.

Business rules:

* The admin will be able to transfer all the existing the startup data to clients DB.
* Once the startup data has been transferred, the admin won’t be able to transfer the data again.
* The Startup that are disabled won’t be transferred to the client’s DB.
* While transferring the data if the startup data already exists in client DB then that particular startup data won’t be copied.

## Client Module

This is the module that will be used by the client and their users. The users will be able to login to the module and use its functions. There will be three kinds of user in the system. They are as follows:

1. Admin User:

* Admin User will be able to Add/Edit/Disable/Import Startup to the system.
* Admin User will be able to Add/Edit/Disable/Import Users to the system. The admin will only be able to add user to the number that is allowed to it by the MySRM admin.
* Admin User will be able to set the rating parameters for the Startup in the system. This can be done in system wide level and also Startup specific level.

1. Normal User:

* Normal User will be able to login to the system and use all of the function except that are specific to admin user.

1. External User:

* External user will not be able to logon to the system.
* External user will only be able to access the Survey page that will be sent to it via mail. The link sent will be of one-time use.

### Admin: User Management Function

Client admin will be able to add users to their DB. The Client user will have following attributes:

Client User Attributes (Based on EXCEL provided):

|  |  |
| --- | --- |
| **Field** | **Validation** |
| email | *email format* |
| First Name | *String of characters* |
| Last Name | *String of characters* |
| Country | *From a defined list* |
| Business Unit | *Free text* |
| Telephone (mobile) | *International format* |
| Telephone (landline) | *International format* |
| *Type of user* | *Admin or Standard* |
| *Area of expertise* | *From list of tags* |

The Yellow fields are the mandatory fields.

(Note: The attributes will be updated as we go.)

Business rules:

* The admin will be able to Create User till the limit of their user count is met.
* Multiple Client User with same Email cannot be created.
* The admin will be able to edit the details of any user.
* The admin will be able to disable any user from their system. When a user is disabled the user will not be able to login to the system.

### Admin: Startup Management Function

Client admin will be able to Add/Edit/Disable Startup information using the CMS. Startup will have following attributes associated to them:

Startup Attributes (Based on EXCEL provided):

|  |  |
| --- | --- |
| **Field** | **Validation** |
| Company Website | Must be a url |
| Startup Name | Free text |
| HQ | From a standard list of countries |
| Industry | Free text |
| Tech Focus | Refer to list of tags |
| Area of Disruption | Free text |
| Source | Free text |
| Met/Talk | dd/mm/yyyy format |
| Vision | Free text |
| Countries of Activities (Footprints) | From a standard list of countries (mutliple choice possible) |
| Date of Incorporation | dd/mm/yyyy format |
| Address (line 1) | Free text |
| Address (line 2) | Free text |
| Postcode | Free text |
| Country | From a standard list of countries |
| Telephone | International format |
| Email | Must be a valid email format |
| Funding Rounds | Must be either: n/a, Seed, Series A, Series B, Series C, Series D, Series E, Series F, Series G, IPO |
| Backers | Free text |
| Total Funding | Numbers |
| Currency | From ISO list of currencies |
| Model | Must be either: B2B, B2C, C2C, B2B2C, other |

Startup Contact Attributes:

|  |  |
| --- | --- |
| **Field** | **Validation** |
| Name | Free Text |
| Designation | Free Text |
| Email | Valid Email address |
| Contact Number | Valid Phone number |
| Picture | jpg,png |

The Yellow fields are the mandatory fields.

(Note: The attributes will be updated as we go.)

Business rules:

* The admin will be able to Create/Edit/Disable Startup.
* Multiple Startups with same Company Website cannot be created.
* If a Startup is disabled by the admin, it will not be visible to any user and no interaction can be done with it.
* The admin will be able to add the startup contact information later.

### Admin: Startup Import

Client admin will have access to import module which can be used to bulk import the Startup to the system. The admin will have to prepare an EXCEL(.xlsx) file of provided format to import. The attributes will be the same as defined in “Startup Function”.

Business rules:

* The admin will be able to bulk import Startup from an Excel(.xlsx) file of correct format. The correct format template can be downloaded from the import section itself.
* After the import is complete, admin will be able to see message “'X' records imported, 'Y' records saved, 'Z' records had error, 'M' Records were duplicate.”
* In case of duplicate records, the admin will have an option to overwrite the existing record with that of excel or just ignore it.

### Admin: Client User Import

Client admin will have access to import module which can be used to bulk import the user to their system. The admin will have to prepare an EXCEL(.xlsx) file of provided format to import. The attributes will be the same as defined in “Client User Function” section.

Business rules:

* The admin will be able to bulk import Client User from an Excel(.xlsx) file of correct format. The correct format template can be downloaded from the import section itself.
* After the import is complete, admin will be able to see message “'X' records imported, 'Y' records saved, 'Z' records had error.”
* In case of duplicate records, the duplicate records will be discarded.

### Admin: Startup Rating Setup

The rating of Startup will have two sections i.e.: Contribution to our business & Operational Risk. These sections will have a list of topics in which the users will be able to rate the startup. Each topic will have a percentage weightage and the summation of that for a section should result in 100%. The client admin will be able to add these topics. The topics will be set for all the startups by default but the admin will be able to set customized topics for any startup.

Business rules:

* The admin will be able to add/edit/delete the topics for any section.
* The admin will be able to define the order of topic for a section.
* The admin will be able to define the weightage of topic in the section and the summation of weightage for all the topic should result in 100%.

### User: Team page (List/Filter)

This page will list the team members and will allow the user to view the profile detail of team members.

Business rules:

* The users will be able to view the team member list by clicking in the team member name.
* The team member detail page will contain following sections:
  + Team Member details (Name, Country, BU, Specialization, Email, Phone)
  + Team Member’s feed (List of actions performed by them)
  + List of Startups that they are working with.
* The user will be able to use filters to filter the team member list. The Filter will be on the basis of Country, BU and Domain.

### User: Startup List (List/Add to My Startup)

This page will list the Startups present in the system. The page will have two sections: My Startups & Client’s startups

Business rules:

* The page will list the startups present in the system. It will be displayed in two sections: My Startups & Client’s startup
* My Startups section will contain the startups that the user is currently working with.
* My Startups section will contain “Add Startup” button which will allow the user to add any startup to My Startups list.
* When the user creates a pilot with any startup, the startup will automatically be added to My Startup section.
* The user will be able to search in Client’s startups section on the basis of Name, tags, etc (TBD).

### User: Startup Identification (View/Edit)

The identification page will display the description and details of the startup.

Business rules:

* The identification page will contain Startup description, Analysis, Business, Feed, client’s Team Involved, Contacts and Similar Startups section.
* Any user will be able to edit the Description, Business and part of Analysis section.
* In the analysis section, there will be an option to modify the rating through which user will be able to give their rating.

### User: Startup Rating (View/Edit)

The user will be able to see the rating of startup on the page and will also be able to enter their own rating for startup.

Business rules:

* The user will be able to view the aggregate rating of the startup.
* The user will also be able to view the individual rating of any user who have rated the startup.
* The rating login is described below:
  + The users will be able to rate in two sections: ‘Contribution to our business’ & ‘Operational risk’.
  + Each section will have topic on which the users will be able to rate it in.
  + The rating will be from 1 to 5.
  + The topic will have a percentage weightage attached to it.
  + For the rating point of single user, we multiply the % weightage with the rating for a topic and then sum them all.
  + For aggregate rating, we simply take the average rating of all the users.
* In case the admin removes a topic from the section, all its corresponding rating values will also be removed with it.
* In case the admin adds new topics to the section, the existing users rating for that topic will be blank and can be added later by the user.

### User: Startup Pilot

The user will be able to create multiple pilots with any startup. This basically means that the user has started working with the startup.

Business rules:

* The user will be able to create multiple pilots with a startup.
* The Pilot section will have following sections:
  + Pilot
    - Pilot Name
    - Pilot Phase
  + Pilot Description
  + Pilot Target
  + Documents
  + Video
* The user will be able to create multiple phases for the pilot and update the phases as pilot goes on. The phase will progress 25% at a time.
* Pilot targets are the targets that are setup for the startup to meet. It will have three status: In-Progress, Completed & missed.
* In the document section, the user will be able to upload all the documents that are associated with the pilot.
* The video section will contain the video that is associated with the pilot. The video can be an embedded video from YouTube or similar online video platform

### User: Startup Exit

TBD

### External User Rating

External Users are the users who don’t have access to the system but they can rate the startups with the link provided by the client admin. They basically are sent a survey link to rate the startups.

Business rules:

* The external users will not be able to login to the system.
* The admin will have a module in which the admin can choose a startup and then a list of external users to send out the surveys to.
* Once the admin sends the survey mail, external user will receive a link in the mail. Clinking on the link will direct the external user to the survey page where they can fill out the rating for the startup.
* The link can only be used once.
* The rating by the external users is stored separately than the ones done by normal user.

### News Feed

The New feed will show the list of action performed by the team members. The list of predefined actions is defined in “List of actions.xlsx”.

### Search Function

The logic for Search Function is defined in “MySRM - search.pptx”

# Technical specifications

## Technology

|  |  |
| --- | --- |
| **Specification** | **Backend** |
| **Programming Language** | PHP |
| **Supported Platform** | Mozilla 46 and Up  Chrome 50 And Up |
| **Framework** | Laravel |
| **CMS** | EKCMS |
| **UI Framework** | Monarch |
| **Database** | mySQL |

## Environments

The environments are as follows:

|  |  |  |
| --- | --- | --- |
| **SN** | **Name** | **URL** |
| 1 | Development (DEV) | <http://dev.mysrm.co/> |
| 2 | Testing (QA) | <http://qa.mysrm.co/> |
| 3 | User Acceptance Testing (UAT) | <http://uat.mysrm.co/> |
| 4 | Production (PROD) | <http://mysrm.co/> |

# Test Plan

## System Testing

Test Cases will be developed on the basis of requirement and will be executed once the functionality is completed.

## Automation Testing

Once the System testing of the module has been done, automation script will be prepared for those scenarios. This automation script will be used for regression testing.

# Appendix A: To Be Determined List

* Need to finalize the Excel Import Templates.
* Need to finalize who modifies value of the Exit parameters.