# Business Requirements Document (BRD)

**Project Title:** Optimizing the Internal Request Tracking System

**Client/Organization:** Regional Municipality of York

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# 1. Project Overview

## 1.1 Purpose
The purpose of this project is to modernize and centralize the internal request tracking process, reducing inefficiencies caused by Excel- and email-based systems, while providing actionable insights for management.

## 1.2 Objectives

- Enable users to submit, track, and update requests efficiently.
- Implement role-based access (Admin, Management, External Users) for secure data handling.
- Provide management with visual analytics (dashboards) for data-driven decision-making.
- Automate notifications and updates using Power Automate to reduce manual effort.

## 1.3 Scope

### In Scope:

- Power Apps form for request submission
- SharePoint list for centralized data storage
- Gallery view with filters (date, project status, assigned team leader, deadline status)
- Power BI dashboard for visual insights
- Automated emails via Power Automate

### Out of Scope:

- Integration with third-party systems outside Microsoft 365
- Mobile app beyond tablet responsiveness

# 2. Stakeholders

| Stakeholder | Role | Responsibility |
|---|---|---|
| Admins | System Management | Manage users, approve requests, oversee gallery views |
| Management | Decision-Making | Monitor KPIs, filter and sort requests, access dashboards |
| External Users | Request Submission | Submit and track requests within permitted access |
| IT Team | Support & Maintenance | Ensure SharePoint and Power Apps integrations work as expected |

## 3. Functional Requirements

| ID | Requirement Description | Priority | Status |
|-----|------------------------|----------|--------|
| FR1 | Users must submit new requests via Power Apps form | High | Implemented |
| FR2 | Requests stored in centralized SharePoint list with unique IDs | High | Implemented |
| FR3 | Admins/analysts can view, filter, sort requests in gallery | High | Implemented |
| FR4 | Role-based views for Admin, Management, External Users | High | Implemented |
| FR5 | Users can update/edit submitted requests per access rights | Medium | Implemented |
| FR6 | Power Automate sends confirmation and status update emails | Medium | Implemented |
| FR7 | Gallery supports filtering by date, project status, team leader, deadline status | Medium | Implemented |
| FR8 | Data visualizations (bar/pie charts) for management insights | Low | Implemented |

## 4. Non-Functional Requirements

| ID | Requirement Description | Priority | Status |
|------|------------------------|----------|--------|
| NFR1 | Accessible within secure Microsoft 365 environment | High | Implemented |
| NFR2 | Load time for forms and gallery ≤ 3 seconds | Medium | Implemented |
| NFR3 | Support responsive design for desktop/tablet | Medium | Implemented |
| NFR4 | User actions logged for audit purposes | High | Implemented |
| NFR5 | Comply with regional privacy and data retention standards | High | Implemented |
| NFR6 | ≤5 clicks to submit a new request | Medium | Implemented |
| NFR7 | Maintainable and scalable for future enhancements | Medium | Implemented |

## 5. User Stories

| As a… | I want to… | So that… | Priority | Status |
|-------|-----------|----------|----------|--------|
| Admin | View all data requests in a gallery | I can track project progress and manage assignments | High | Implemented |
| Admin | Filter and sort requests by date, project status, team leader, or deadline status | I can easily find and prioritize tasks | High | Implemented |
| Admin | Receive email notifications when a request is submitted or updated | I am aware of changes and updates in real-time | Medium | Implemented |
| Management | View charts and dashboards of requests by status over time | I can gain insights and make data-driven decisions | Medium | Implemented |
| External User | Submit a new data request through Power Apps | My request is recorded in the system with a unique ID | High | Implemented |

| External User | Edit or update my submitted requests | I can correct or add information if needed | Medium | Implemented |
|---|---|---|---|---|
| **System** | Assign unique IDs to each submitted request | Requests are easily identifiable and trackable | High | Implemented |
| **System** | Support role-based access (Admin, Management, External) | Users see only the data relevant to them | High | Implemented |

## 6. Business Rules

- Completed requests are automatically flagged and cannot be edited by external users.
- Requests exceeding deadlines trigger automated alerts.
- Only assigned team leaders can update request status.
- Admins have full visibility of all requests; external users see only their submissions.

## 7. Data Requirements

- Fields captured in SharePoint: Request ID, Request Date, Project Name, Assigned Team Leader, Project Status, Deadline, Brief Description, Confidential Flag
- KPIs calculated: Requests due within 5 days, overdue requests, requests by status and team leader and requests by deadline (month) and project status.
- Reports and dashboards must be refreshed daily

## 8. Assumptions

- All users have Microsoft 365 credentials
- Data entered into the Power Apps form is accurate and complete
- Internet connectivity is reliable for dashboard and gallery usage

## 9. Constraints

- Power Apps and SharePoint list size limitations
- Must remain within the Microsoft 365 environment
- Dashboard refresh and calculation performance are subject to SharePoint data limits

## 10. Acceptance Criteria

- Users can submit, edit, and view requests per role
- Gallery filters return accurate results
- Dashboard accurately displays KPIs
- Automated notifications are sent reliably on submission/status changes
- System maintains <3s load time under normal usage