

SureLock Storage

Storage Management System Development

**Request for Proposal
Version 2.0**

Date 2019-01-22

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Document History

Version	When	Who	What
1.0	2019-01-16	SureLock Storage	Initial Drafting
1.1	2019-01-20	SureLock Storage	Final Drafting
2.0	2019-01-22	SureLock Storage	Finalized Document

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1.0 Problem description / Expression of need

SureLock Storage is looking for a software system to manage our storage units more efficiently. Currently, we gather our clients' information on site and through email and we use Microsoft Excel to track data such as payment info, balance, and unit cost.

As our company is growing at a fast rate, we have discovered several problems with our current system:

- Difficult to keep track of the clients' payment status
- Difficult to know where in the storage facility each client's unit is located
- There is no way to see a client's payment history or how long they have been renting a storage unit

A new system is required in order to save time and money. Currently, a large amount of time is spent cross referencing a whiteboard and excel sheet to ensure that no payments are missed. With all the information in one easily accessible place, that time can be used to acquire new clients and manage current client needs.

2.0 Project Objectives

Our company's goal is for the *Storage Management System Development* to satisfy the following objectives:

- Enhance management of storage units
- Improve company organisation
- Support the construction of new storage units
- Support client accounts
 - Invoices
 - Partial payments and multiple payment methods
 - Additional charges and late fees
- Enable searching through current and past records by last name
- Adequate security features
 - Password authentication
 - Level of access hierarchy
 - Administrator user group
 - Hourly employee user group

The listed objectives should be met by developing a graphical interface for adding and viewing the storage units, an interface for client accounts, and an interface that enables searching. All three interfaces are for on site use; there is no need for client interaction with the system.

Storage Unit Viewing Interface

The storage unit viewing interface must be organised in a way such that the user has a complete view of the storage facility and all units. Currently, there are between 200 and 225 units in the facility. In the interface, each unit must include the unit cost, the physical dimensions, the unit number and the current client's name. There must also be a module to write additional comments and information about the unit.

Client Account Interface

The client account interface must handle all client information, most importantly the payment methods, and the current balance. Client's account information should include full name, any additional comments, current rate, method of payment, last paid date, amount owed, as well as which units are currently rented by the client and their corresponding sizes. This must be a secure interface and will only be used by management.

Searching Interface

The searching interface is needed to search for invoices, transactions, and other useful documents, it must be able to search at least two years back in time by last name of client. It should be simple to quickly search and find information on storage units and clients. This interface must also be secure as sensitive client information will be accessed.

3.0 Current Systems

The company currently uses a combination of a whiteboard and an excel spreadsheet to keep track of which storage units have been rented, how much they cost, and their physical dimensions. A prototype of the new system containing a graphical interface was recently drafted, which allows the company to:

- Manage units in with a graphical interface
- Track current costs of each unit
- Write notes about each unit
- Track which units have been leased
- Track when the lease on each unit expires

In the new system, we would like to be able to view client and unit data in tables, similarly to how we are accustomed to viewing data in Excel. The new system should be faster and easier to use, especially when it comes to incorporating new units and adding new customers.

4.0 Intended users and their interaction with the system

The system's use will be exclusively internal to SureLock Storage and there will be no client interaction with the system. The two intended user groups within the company are administrators and hourly employees. Client payment information and personal data will be stored within the system, so there must be adequate security measures in place.

The administrators or management staff require full access to add, remove, edit, and update client information. This client information will include names, payment details, outstanding payments, and unit numbers. Administrators should also be able to add new storage units to support expansion and access past client records of up to two years in age. These users will be responsible for keeping the system up to date and overseeing the input of client information. They will be the core operators of the system. Administrator accounts should only be authorized and created by upper management in cooperation with the IT team.

The hourly employees require a lesser degree of access. The primary interactions of these users within the system will be to monitor the vacancy status of units and to add specific notes on units such as maintenance requests. Employee accounts should not be able to access sensitive information such as client information or payment details. Employee accounts should be authorized and created by administrators or upper management in cooperation with the IT team.

5.0 Known interaction with other systems within or outside the client organization

Our company does not currently use any specialized software systems at this time. As this system will only be accessible internally, there will be no interaction with any outside clients or other users. The product will likely support future marketing decisions and assist in tracking account history of clients.

The data collected may be used to determine whether expansion is feasible and produce evidence for future business decisions such as increasing the number of storage units and advertisements. The company currently uses an excel spreadsheet to manage this client information. Ideally the new system will have an easy way of importing/exporting the current data.

6.0 Known constraints to development

The main constraints for this project are outlined below. These are crucial for system efficacy and privacy.

Password Protection

We only want authorized employees to have access to the system. The system will not be available to clients, only to employees who have been granted authority through a password. Since this system will have private information, we want to limit access to only employees who have been granted a password.

Historical Payment Tracking

Since some of our users are on a month-to-month basis, we need to be able to track outstanding payments and sync our payment information with the payment system. The payment tracking must allow for payment data to be recorded and stored for two years.

Dynamic Graphical Interface

To keep up with our expanding business, the system must allow for storage facility expansion. Site expansion and addition of singular units should be possible as we are planning to expand in the near future.

Budget

The budget for this project is \$50,000.

7.0 Project Schedule

ID	Task Name	Start Date	End Date	Duration	Assigned To	Percent Complete
1	Release Request for Proposal (RFP) to Market	2019-01-16	2019-01-22	1 Week	SureLock Storage	100%
2	Responds to RFP with Requirements Document 1.0 (RD1.0)	2019-01-23	2019-02-05	2 Weeks	Designer Company	0%
3	Respond to RD1.0 - (RD1.1)	2019-02-06	2019-02-06	1 Day	SureLock Storage	0%
4	Meeting to Discuss RD1.1	2019-02-07	2019-02-07	1 Day	SureLock Storage and Designer Company	0%
5	Requirements Specification Document 0.9 (RSD0.9)	2019-02-07	2019-03-12	5 Weeks	Designer Company	0%
6	Read RSD0.9	2019-03-13	2019-03-13	1 Day	SureLock Storage	0%
7	Prototype Demonstration	2019-03-14	2019-03-14	1 Day	SureLock Storage and Designer Company	0%
8	RSD1.0	2019-03-14	2019-03-19	6 days	Designer Company	0%
9	Respond to RSD1.0 - (RSD1.1)	2019-03-20	2019-03-21	2 Days	SureLock Storage	0%
10	RSD2.0	2019-03-22	2019-03-26	5 Days	Designer Company	0%

8.0 Project team

SureLock's team consists of eight motivated department heads that provide the best storage options available and can be contacted at the following email and website:

Email: seng321group12019@gmail.com

Website: <https://ansh-projects.github.io/SENG321-websites/client.html>

Ross Alexandra		CEO
Nicole Peverly		Chief Financial Officer
Isaac Donaldson		Head of Marketing
Andrew Polanyi		Site Manager
Connor Schultz		Head of Customer Relations
Possum Nuada		Head of Security
Ansh Shulka		IT Manager
Landon Marshall		Head of Grounds Management

9.0 Glossary of terms

[Storage] Unit - A locked room varying in sizes from 4ftx5ft to 10ftx20ft used as secure storage for client's personal property.

[Storage] Facility - Property used for the purpose of renting individual storage space to clients for the purpose of storing personal property.