Sample Trials BRD:

Title: Material Trial Management and Evaluation Workflow

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1. Purpose

This document outlines the business requirements for a Material Trial Management and Evaluation Workflow. The system will facilitate tracking of incoming material trials, manage approvals, coordinate between approvers & departments (CMK, PPC, Procurement), and enable end-to-end traceability from submission to evaluation

2. Stakeholders

Role	Responsibilities
Requestor (Technical & procurement team)	Submits material trial requests
CMK	Reviews material requests and decides next steps (Trial, Pilot, or Reject , at which plant – (if P4,P5,P6 selected then notify Rao sir)
PPC	Records PR numbers and material codes for approved materials
Procurement	Orders materials, tracks delivery, and adds remarks
Evaluation Team (Rahul Mishra & Ramu)	Marks material receipt, tracks evaluation status, uploads evaluation reports

3. Functional Requirements by Role

3.1 Role 1: Requestor – Submit Material Trial Request (User & Procurement team)

UI Layout: Tabular form + Create New button

Fields Required:

Field	Type	Logic/Details
Date Received or Inputted	Date Picker	Auto-populated or user-selected
Material Category	Dropdown	Source: 'Stamp' reference list
Material Details (incl. Model Number)	Text Field	Free text
Supplier Name	Text Field	Free text
Quantity (not mandatory)	Numeric	Input in units
Trial to be Conducted at Plant	Dropdown	Options: Yes / No :,
Purpose	Dropdown + Dynamic Option	Options: Quality Improvement, Alternate Vendor Development, Others (custom input)
BIS Required (not mandatory)	Checkbox	If checked: show cost field & 'Cost Beared By' dropdown
BIS Cost (not mandatory)	Numeric (Conditional)	Visible only if BIS checkbox is selected
BIS Cost Borne By (not mandatory)	Dropdown	Options: Premier / Supplier/Both/Against order (If against order give remarks section to write %)
IEC Required (not mandatory)	Checkbox	If checked: show cost field & 'Cost Borne By' dropdown
IEC Cost (not mandatory)	Numeric (Conditional)	Visible only if IEC checkbox is selected
IEC Cost Borne By (not mandatory)	Dropdown	Options: Premier / Supplier/Both/ Against order (If against order give remarks section to write %)
Submit Button	Action Button	Submits the request for approval

3.2 Role 2: CMK – Review & Approve Request

UI Elements:

- View request list

- Clickable modal with details

Modal Fields:

- Display all data submitted

- Response Options:

    ○ Approve Trial Run – give drop down at which plant

    ○ Approve Pilot Run - give drop down at which plant

    ○ Reject

Conditional Actions (on Approval):

- Allow edit of:

    ○ Quantity (Numeric) (of material) (numeric +character , example – I Pallet, 1 container etc)

        ○ Trial to be Conducted at Plant (Dropdown)

Post Approval Routing:

- Forward to Procurement and PPC
  And notify to technical team & rao sir

3.3 Role 3: PPC – PR Management

UI Elements:

- View list of approved material trials

- Input Fields:

    ○ PR Number (Text)

○ Material Code (Text)
- Material Description

Action Button:

● Submit (Saves data and forwards to Procurement)

3.4 Role 4: Procurement – Ordering and

Tracking UI Elements:

● View all approved requests with full details

Actions:

● Click "Ordered" button
Option to select air shipment or sea shipment

Conditional Fields:

● Estimated Delivery Date (Date Picker – visible only if Ordered is selected) ●

Remarks (Text Area for comments) ● Delivered at Factory (Checkbox)

Forward to Stores Team

3.5 Role 5 : Stores Team should have status view of all items marked by

procurement as delivered at factory as well as rest also as not-delivered. They

should have option to change status and upload receiving document and select

name of person to whom they handed over.

3.6 Role 6: Evaluation Team – Material Receipt &

Evaluation Team Members: Rahul Mishra, Ramu UI

Elements:

- View list of delivered materials

Actions:

- Mark as:

  - Received → Prompt for Tentative Evaluation Completion Date (Date Picker)

○ Not Yet

Conditional Flow:

● If marked as received:

○ Notify PPC and ask them for tentative plan (date range) – once done- it should be sent to technical team as notification to upload evaluation report

○ Enable upload of evaluation report (File Upload)

Post Upload:

● Automatically route the report to CMK for final review and give him a remarks section to put his views if any.

4. Non-Functional Requirements

Category	Requirement
Accessibility	Web-based system with responsive design
Audit Trail	Every action (submit, approve, reject, upload) must be logged with timestamp
Permissions & Roles	Role-based access to ensure data security and proper workflow routing
Data Validation	Mandatory field checks, dynamic field visibility, conditional logic
File Support	Uploads should accept PDF, DOCX, XLSX

5. Workflow Summary Diagram (Suggested for Implementation) Requestor

→ CMK → PPC → Procurement → Evaluation Team → CMK

Note – Whenever a deadline date is crossed, automated notification should

go to team.