IRIS Exchequer Web Portal UI

Estimates

Subject

Document History

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| --- | --- | --- | --- | --- |
| **Version** | **Status** | **Author** | **Description** | **Date** |
| 1.0 | Started | M Higginson | Initial Version | 17/03/2009 |
| 1.1 | Mod | M Higginson | Added Serial/Batch/Bin Picking Dialogs into 2.2. | 18/03/2009 |
|  |  |  |  |  |

Distribution List

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| **Name** |
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# Overview

Due to a lack of experience in writing Web Applications and consuming Web Services the estimates are based on the time taken to write a Win32 application using the COM Toolkit in Delphi 6 and assumes that there is no existing code to re-use at the start of this project. These estimates can then be multiplied by a factor to guestimate how long it would take to write a Web Portal equivalent.

The work items have been taken from section 4.4.1 of Market Requirements Document for IRIS Exchequer Web Portal/UI.

This document contains no work items or timescales for writing the web-services consumed by the web portal, or time for writing a web portal.

# 2.0 Work Items

## 2.1 Timesheet Records (ID 1.1)

User will via portal create new timesheets or amend existing un-authorised timesheets.

|  |  |
| --- | --- |
| **Timesheet Entry** | **14.5 Days** |
| Timesheet Header Dialog  Basic Dialog (0.25d), Fields (0.25d), List (0.75d), Add/Edit/Delete (0.5d), Save (0.5d) | 2.25d |
| Timesheet Lines Dialog  Basic Dialog (0.5d), Fields/Business Rules (1.5d), Validation (0.5d), Save (0.25d) | 2.75d |
| Popup Lists  Generic Popup List (1.5d), Employee (0.25d), Job (0.25d), Time Rates (0.5d), Analysis Codes (0.25d), Cost Centre (0.25d), Department (0.25d) | 3.25d |
| Notes  Notes List – Dated/General(1d), Notes Entry (0.75d) | 1.75d |
| Email as Attachment  Dialog (0.75d), Print To Email (0.25d) | 1d |
| Plug-In Support  User Defined Fields Validation (2d), User Defined Periods (1.5d) | 3.5d |
| **Timesheet Amendment**  Amendment Support (1d) | **1 day** |
| **Un-Authorised Timesheet List**  Basic Dialog (0.25d), List (1.5d), Add/Edit (0.25d) | **2 days** |
| *(adjust using Web-Portal wobble factor)* | 17.5 Days |

## 2.2 Expense Records (ID 1.2)

User will via portal create new purchase invoices or amend existing un-authorised purchase invoices.

The following timescales assume that 2.1 Timesheet Records has been completed and the code re-used wherever possible.

|  |  |
| --- | --- |
| **Purchase Invoice Entry** | **13.25 Days** |
| PIN Header Dialog  Basic Dialog (0.75d), Fields (1.5d), List (0.75d), Add/Edit/Delete (0.5d), Save (0.5d) | 4d |
| PIN Line Dialog  Basic Dialog (0.5d), Fields/Business Rules (2.5d), Validation (0.5d), Save (0.25d) , Serial/Batch Picking Dialog (2d), Multi-Bin Picking Dialog (1d) | 6.75d |
| Popup Lists  Supplier (0.25d), Stock (0.25d), Location (0.25d), GL Codes (0.5d) | 1.25d |
| Notes  Re-use Notes code from 2.1 (0.5d) | 0.5d |
| Email as Attachment  Re-use Print To Email code from 2.1 (0.25d) | 0.25d |
| Plug-In Support  Re-use User Defined Fields Validation from 2.1 (0.25d), Re-use User Defined Periods from 2.1 (0.25d) | 0.5d |
| **Purchase Invoice Amendment**  Amendment Support (0.75d) | **0.75 Days** |
| **Un-Authorised Purchase Invoice List**  Copy Un-authorised Timesheet List from 2.1 and modify (0.5d) | **0.5 Days** |
| *(adjust using Web-Portal wobble factor)* | 14.5 Days |

## 2.3 Requisition Records (ID 1.3)

User will via portal create new purchase quotes or amend existing un-authorised purchase quotes.

The following timescales assume that 2.1/2.2 have been completed and the code re-used wherever possible.

|  |  |
| --- | --- |
| **Purchase Quote Entry** | **1 Day** |
| PQU Header Dialog  Customise PIN Header Dialog from 2.2 (0.5d) | 0.5d |
| PQU Line Dialog  Customise PIN Line Dialog from 2.2 (0.5d) | 0.5d |
| **Purchase Quote Amendment**  Customise Amendment Support (0.25d) | **0.25 Days** |
| **Un-Authorised Purchase Invoice List**  Customise Un-authorised Purchase Invoice List from 2.2 (0.5d) | **0.5 Days** |
| *(adjust using Web-Portal wobble factor)* | 1.75 Days |

## 2.4 Purchase Order (ID 1.4)

Work required will be the same as for 2.3 Purchase Quote.

## 2.5 Deployed (ID 1.5)

The Web Portal must have its own installer allowing it to be deployed on customer’s own servers.

As the technologies being used to develop the Web Portal have not been finalised it is impossible to give a timescale to install the end product. If a number has to be provided then I would guess at 10 days.

## 2.6 Role Based Logon (ID 1.6)

The Web Portal must reflect the rights of the user logging in, e.g. check their Exchequer permissions.

No explicit work item is required for this, it should be included automatically in all other work items where it applies.

## 2.7 Cross Sell (ID 1.7)

Users must have the option to review courses and services from IRIS.

As the technologies being used to develop the Web Portal have not been finalised it is impossible to give a timescale for this.

However, I would imagine that this would either be done via an RSS feed or more likely via a web-page on [www.iris.co.uk](http://www.iris.co.uk) being brought into the portal. In either case I would expect the work required by development to be negligible (5 days?) as the generation of an RSS feed or a web-page on [www.iris.co.uk](http://www.iris.co.uk) would fall outside the scope of this task, more likely falling under the remit of marketing, training and creative.

*NOTE: End-users would require internet access for this to work.*

## 2.8 Future Add-Ons (ID 1.8)

Ability to attach additional add-on plug-ins (or widgets) as required in future releases.

As the technologies being used to develop the Web Portal have not been finalised it is impossible to give a timescale for this, however I would expect this functionality to have been included as a fundamental principle of the web portal software.

## 2.9 3rd Party Add-Ons (ID 1.9)

Ability for partners to install their own add-on plug-ins (or widgets) on customer’s own installations.

As the technologies being used to develop the Web Portal have not been finalised it is impossible to give a timescale to allow 3rd party integration into the Web Portal.

## 2.10 Authorisation (ID 1.9 (Again!))

Transaction Status’s should be modifiable for certain types of users of the portal – aka Authoris-e.

I have made the assumption that we are going to back this onto Authoris-e as there will be a full Exchequer install present on the server and some users will still be using the standard Exchequer so it will be setup and running.

After going through it with Paul Rutherford (Authoris-e developer) we have identified the following functionality being required/recommended:-

|  |  |
| --- | --- |
| Extend transaction save for PQU/POR/PIN/TSH to automatically apply Authoris-e Floor/Authorisation Limits – this functionality will be within the web service. | 0 Days |
| Ability to request authorisation on PQU/POR/PIN/TSH Un-Authorised Lists  Add buttons to lists to call web-service function (0.5d) | 0.5d |
| Ability to authorise on PQU/POR/PIN/TSH Un-Authorised Lists  Add buttons to lists to call web-service function (0.5d) | 0.5d |
| List of transactions awaiting authorisation by logon user | 2 Days |
| *(adjust using Web-Portal wobble factor)* | 3 Days |

*NOTE: Timesheet support in Authoris-e is apparently on the roadmap.*

## 2.11 RSS Feeds (ID 2.0)

Ability for users of Exchequer to generate reports via VRW and Sentimail that are made available via an RSS feed.

Both VRW and Sentimail support printing VRW Reports to HTML so in theory all we need to do is allow it to upload the resulting HTML file to an accessible location and then add the report into the RSS Feeds via a web service call.

I don’t view the management of RSS feeds as being within the scope of this item.

|  |  |
| --- | --- |
| Sentimail  Extend Sentinel Wizard to support RSS (0.5d), Implement Print To RSS (2d) | 2.5 Days |
| VRW  Print To RSS (2d) | 2d |
|  | 4.5 Days |

## 2.12 Goods Movements (ID 2.1)

User will via portal create new stock adjustments.

The following timescales assume that 2.1/2.2 have been completed and the code re-used wherever possible.

|  |  |
| --- | --- |
| **Stock Adjustment Entry** | **Day** |
| ADJ Header Dialog  Basic Dialog (0.25d), Fields (0.5d), List (0.75d), Add/Edit/Delete (0.5d), Save (0.5d) | 2.5d |
| ADJ Line Dialog  Basic Dialog (0.5d), Fields/Business Rules (1d), Validation (0.5d), Save (0.25d) | 2.25d |
| Plug-In Support  Re-use User Defined Fields Validation from 2.1 (0.25d), Re-use User Defined Periods from 2.1 (0.25d) | 0.5d |
| *(adjust using Web-Portal wobble factor)* | 5.25 Days |

## 2.13 Goods In (ID 2.2)

The ability for users to locate and update the line quantities on a purchase order, this is equivalent to the Receive functionality in the Purchase Order Daybook in Exchequer.

|  |  |
| --- | --- |
| **Purchase Order ‘Receive’ Mode** | **1.5 Days** |
| POR Header Dialog  Customise POR Header Dialog from 2.4 (0.5d) | 0.5d |
| POR Line Dialog  Customise POR Line Dialog from 2.4 (1d) | 1d |
| *(adjust using Web-Portal wobble factor)* | 1.5 Days |

## 2.14 Personalisation (ID 2.3)

User shall be able to personalise all aspects of the portal they have access to, once they have registered.

As the technologies being used to develop the Web Portal have not been finalised it is impossible to give a timescale for this, however I would expect this functionality to have been included as a fundamental principle of the web portal software.

## 2.15 Document Management (ID 2.4)

Ability to view documents from the Infonic Document Management System.

This would need to be implemented via 2.9 3rd Party Add-Ons by Infonic.

## 2.16 Organisation Chart Viewer (ID 2.5)

Used as part of a client’s intranet features allowing the user to see an individual’s position within the organisation along with contact information.

This would need to be implemented via 2.9 3rd Party Add-Ons by whoever was providing the Organisational Chart software.