# **Business Requirements Document (BRD)**

**Project Title:**  
Traveler Workflow & Documentation Enhancement (TWD – Traveler Workflow Documentation)

**Prepared For:**  
Stakeholders & Management

**Prepared By:**  
Preet Raval, Kanav Sharma

**Date:**  
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## **1. Executive Summary**

The **Traveler Workflow & Documentation Enhancement (TWD)** project aims to replace and improve the current process of Traveler creation in the EVO Application (legacy 1990s system). This document captures business requirements identified after review of the **SharePoint reference link**, **PCB images provided by customers**, **customer instructions**, and **revision versions**, as well as meetings with **Abhishek** and **Kris**.

The project will ensure standardization of traveler templates, define collected data points, improve revision tracking, and explore digital traveler solutions. The system supports organizational goals of **traceability, efficiency, compliance, and scalability**.

## **2. Project Overview**

Today, the Traveler is created in the **EVO Application**. Data is entered manually, and multiple stakeholders (Sales, Purchasing, Engineering, Assembly, Quality, and Shipping) rely on it for order execution. However, the process lacks proper **traceability, template standardization, BOM integration, and barcode-based tracking**.

The project seeks to document **exact data points collected, how they are used**, and to define clear templates and process sequences to enable replication and digital transition.

## **3. Business Objectives**

* Standardize Traveler creation with **2–3 optimized templates**.
* Document and use **all required data points** from customer input, PO, BOM, and revisions.
* Integrate **labor timing, coating process, and revision tracking**.
* Implement **barcode-based tracking** for parts, boards, and travelers.
* Ensure **revision history and old traveler versions remain accessible**.
* Enable preparation for a **digital traveler system** for future efficiency.

## **4. Scope**

### **In-Scope**

* Traveler creation in EVO.
* Data point documentation (PCB details, BOM, instructions, revisions, job numbers, etc.).
* Traveler types: PCB, Parts, Assembly, Cable.
* Preparation checklist, kitting, packing slips.
* Color-coded order travelers and slip codes.
* Cable traveler real-time process definition.

### **Out-of-Scope**

* Replacement of EVO system (covered in future phases).
* Integration with ERP or CRM at this stage.

## **5. Stakeholders**

* **Praful** – Traveler Creation & EVO Operations
* **Max** – Complex PCB Procurement & Oversight
* **Adam** – Engineering Guidance & Written Instructions
* **Abhishek** – Quality & Process Assurance
* **Kris** – Assembly & Testing Operations
* **Bruce** – Business Analysis

## **6. Current Challenges**

* Legacy EVO system limits functionality.
* Manual entry increases risk of error.
* Inconsistent traveler templates.
* Limited visibility into revisions and history.
* Missing barcode tracking for real-time control.

## **7. Proposed Solution**

* Define and collect **all required data points** systematically.
* Standardize traveler templates across order types.
* Implement barcode labels on Traveler and Board.
* Introduce **revision log fields & history**.
* Expand documentation (labor, coating, BOM, job numbers).
* Lay foundation for digital traveler migration.

## **8. Business Requirements**

### **Core Requirements**

1. Collect and use **PCB details** (customer drawings, images, revision versions).
2. Capture **Purchase Order (PO)** data (customer, PO #, date, job #).
3. Integrate **BOM data** directly into traveler.
4. Document **labor timing per step**.
5. Track **coating process** (sent, received, inspected, tracking #).
6. Record **instructions**:
   1. Typed (Praful)
   2. Written (Engineers or Abhishek)
7. Implement **barcode tracking** (Traveler + Board).
8. Ensure **revision history logging**.
9. Maintain **templates** for PCB, Parts, Assembly, Cable.
10. Include **checklists** (PCB, parts, stencil, tools, glue).
11. Provide **packing slips** and enforce **kitting**.
12. Enforce **order color codes** (Premium, Standard, Class 3, Engineering).
13. Define **Cable Traveler real-time flow** with first article approval.

## **9. Non-Functional Requirements**

* **Performance:** EVO traveler generation must not exceed 3 seconds.
* **Scalability:** Must handle 5,000+ active jobs.
* **Availability:** Target 99% uptime of EVO traveler module.
* **Security:** Travelers must be revision-locked and only editable by authorized users.
* **Compliance:** Must comply with audit logging and documentation retention.

## **10. User Roles & Permissions**

* **Traveler Creator (Praful):** Enter top details, job #, typed instructions.
* **Quality (Abhishek):** Provide written instructions and updates.
* **Purchasing (Pratiksha, Bob, Max):** PCB/parts procurement entry.
* **Assembly (Kris):** Confirm assembly readiness, barcode scans, labor time logs.
* **Engineer (Adam):** Approve revisions, first article, and inspections.

## **11. Data & Integration Requirements**

### **Data Points Collected in EVO Today:**

* PO#, Customer Name, Job #
* Traveler Type (PCB, Parts, Assembly, Cable)
* BOM Details (materials, quantities, suppliers)
* PCB images, customer instructions, revision versions
* Sequences (steps: coating, assembly, inspection, shipping)
* Labor hours (per process)
* Coating details (sent, received, inspected)
* Packing slip info (ship-to, kitting confirmation)
* Barcode ID (Traveler + Board)
* Revision log (date, time, responsible person, details)

### **How Data is Used:**

* Generates Traveler pages in EVO.
* Feeds assembly steps and sequences.
* Creates job # linked to PO and BOM.
* Provides traceability through barcode scan.
* Produces packing slip at shipping stage.

### **Integrations:**

* Currently manual; future integration with ERP/CRM planned.

## **12. Process Flows & Use Cases**

**Use Case – Traveler Creation:**

1. Customer sends PO, images, instructions, and revisions.
2. Praful verifies PO and creates Traveler in EVO.
3. Templates selected (PCB/Parts/Assembly/Cable).
4. BOM data imported and signed.
5. Barcode generated and linked to Traveler & Board.
6. Assembly & Quality teams execute process steps.
7. Traveler revision history updated for all changes.
8. Packing slip generated for shipment.

## **13. Business Rules**

* All travelers must have a **job#**.
* Travelers without a **revision log** are invalid.
* Premium orders must always use **red traveler**.
* 1st article (cable) must not proceed without **Quality approval**.

## **14. Acceptance Criteria**

* Traveler includes **all defined data points**.
* Traveler can be generated from EVO template within **3 minutes**.
* Barcode is scannable and linked to correct traveler record.
* Revision log captures **all edits** with timestamp & user.

## **15. Glossary / Definitions**

* **Traveler:** Document that accompanies a job through all stages.
* **EVO Application:** Legacy system currently used to generate Travelers.
* **Sequence:** The steps and processes followed in manufacturing (e.g., Coating, Assembly, Inspection).
* **BOM (Bill of Materials):** Complete list of parts/materials required.
* **Packing Slip:** Document included with shipment showing items and job #.
* **Kitting:** Process of preparing all components needed for assembly.
* **1st Article:** Initial build/sample of a cable or part for approval.
* **Color Codes:** Traveler identifiers based on order type (Red, Green, Orange).

## **16. Risks & Mitigations**

* **Risk:** Incomplete data collection.
  + *Mitigation:* Checklist validation.
* **Risk:** Resistance to barcode adoption.
  + *Mitigation:* Training & pilot program.
* **Risk:** EVO limitations.
  + *Mitigation:* Document requirements for future system migration.

## **17. Dependencies**

* Customer provides **PCB images, instructions,** and **revisions**.
* EVO system remains operational during requirement implementation.
* SharePoint link documents remain accessible.

## **18. Success Metrics**

* 100% of travelers contain complete BOM and revision log.
* Barcode scan traceability for 95%+ of jobs.
* Reduced manual re-entry by 50%.
* Consistent traveler template usage across departments.

## **19. Reporting & Dashboards**

* Traveler completion reports.
* Revision history logs.
* Labor timing and efficiency dashboards.
* Coating process status tracking.

## **20. Change Management & Training Plan**

* Conduct training for Traveler creation, barcode scanning, revision entry.
* Develop SOPs and checklists for all roles.
* Establish help desk support during transition.

## **21. Future Enhancements**

* Full migration from **EVO Application** to a modern ERP/MES traveler system.
* Cloud-based traveler system with real-time tracking and digital sign-off.
* Predictive analytics for resource planning and labor efficiency.

## **22. Sign-Off**

This BRD has been reviewed and agreed upon by stakeholders.

**Praful** – \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_

**Max** – \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_

**Kris** – \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_

**Abhishek** – \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_

**Adam** – \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_

**Bruce** – \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_