

Asset Safe

(Web Application)

Techigai Assessment for Business Analyst

Requirements Specification

*Version 1.1*

June 18, 2022

Prepared By – Avinash Amararapu, Business Analyst

# Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Description** | **Author** | **Comments** |
| June 17, 2022 | Version 1.0 | Avinash Amararapu | Initial Draft |
| June 18, 2022 | Version 1.1 | Avinash Amararapu | Updated with Admin Features |
| June 19, 2022 | Version 1.1 | Avinash Amararapu | Updated with Member Features |
|  |  |  |  |
|  |  |  |  |

# Document Approval

The following Software Requirements Specification has been accepted and approved by the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Signature** | **Printed Name** | **Title** | **Date** |
|  | JOHN ABC | Client |  |
|  |  |  |  |
|  |  |  |  |

**Table of Contents**

Revision History I

Document Approval i

1. Introduction 1

1.1 Purpose 1

1.2 Scope 1

2. General Description 2

2.1 Perspective 2

2.2 General Constraints 2

2.3 Assumptions 2

2.4 In Scope & Out Scope 3

2.5 Process Overview 4

2.5.1 AS-IS Process 4

2.5.2 TO-BE Process 4

3. Specific Requirements 4

3.1 Tools and techniques 4

3.1.1 Web app design 4

3.1.2 Web development 4

3.1.3 Web services 4

3.1.4 Server hosting 5

3.1.5 Testing 5

3.1.6 Team Management 5

3.2 External Interface Requirements 6

3.2.1 User Interfaces 6

3.2.2 Hardware Interfaces 6

3.2.3 Software Interfaces 6

3.2.4 Communications Interfaces 6

3.3 Functional Requirements 7

3.3.1 Asset Safe Standalone Features 7

3.3.2 <Requirements or Features #Admin Console #WebApp> 8

3.3.3 < Requirements or Features #Member #WebApp > 20

4.0 Wireframe Admin Console 29

# 1. Introduction

**Asset Safe** is a web-based content collaboration application that allows individuals to save, share, manage, track KPIs, generate reports, and collaborate on files/personal documents of any size.

**NOTE - All the requirements/points listed here are entirely based on my experience in learning & developing web applications throughout my Computer Science Engineering career and Business scenarios and solutions that I've encountered during my time as a Business Analyst, as well as some Research.**

## 1.1 Purpose

The purpose of this document to describes all functions, features, flow and all the mandatory project modules, etc. And offer the finest solution to assist the document owner in securely storing any documents with shared ownership.

## 1.2 Scope

1. There will be two users: Admin (Owner) & Members.
2. There will be one web application with separate functionality for both admin and members:
3. Web App for Admin: Web app will be available for Admin & Members. The Asset safe web application's administrator (owner) would be able to invite members, adjust settings, and keep track of all activities.
4. Web App for Member: A member would be able to store his or her own personal documents (salary slips, bank accounts, debts) in the account, as well as have access to any shared ownership documents.
5. *Following are main benefits and goals:*

***Benefits****:*

1. *The Asset Safe web app will assist clients in keeping track of their entire financial condition, including all supported digital documents from various categories (Insurance, bank, Land, Equities, stocks & bonds), as well as a thorough dashboard and KPIs to keep track of the family's overall financial situation.*

***Goals:*** To develop this application user friendly and cost effective. To complete this on time so that clients can take benefits of this application and reduce company’s cost value. Be active to know client’s current requirements and trend to keep them happy*.*

# 2. General Description

## 2.1 Perspective

The main perspective of this web app is to integrate scattered personal documents saved in random files/folders/drives to a single cloud storage web app with appropriate secure settings and shared ownership of members, which will aid in any emergency circumstance that a family may encounter.

## 2.2 General Constraints

|  |  |  |  |
| --- | --- | --- | --- |
| **Constraints** | | | |
| **#** | **Area** | **Constraint** | **Comments** |
| **1** | Platform | Cross Web Browser compatibility | Google chrome, Mozilla, Microsoft Edge, safari |
| **2** | Budget (Ongoing costs) | Ongoing support and maintenance, and licensing costs (cloud) | Make sure to include all costs: **shipping & taxes**. This will help you create the full picture for “total cost of ownership” |
| **3** | Deadlines | Sprints Planning (Scrum ceremonies should be aligned with change & feedback) | Meeting goals in terms of when each sprint should start & when to end, what milestones should be reached, and why |

## 2.3 Assumptions

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Assumptions** | | | | |
| **#** | **Assumption** | **To be validated by** | **Status** | **Comments** |
| **1** | Language: English | CLIENT | Approved |  |
| **2** | Language: Regional Languages (HIN, TEL) | CLIENT | Pending |  |
| **3** | As mobile apps are becoming increasingly popular for storing documents, it might be required. | CLIENT | Pending | iOS / Android |
| **4** | Following go-live, user training will be delivered as a **Help Centre** within the web application. | CLIENT | Approved | Every feature will be explained in-detail in that section. |
| **5** | The solution will utilize **REST API** architecture | Dev Team | Pending | Uses HTTP/HTTPS to request access and use data. |
| **6** | The solution will reside in an **offsite cloud** | Dev / DB Architects | Pending | A replica of a company's production system data. Includes – Server Backup |
| **7** | Throughout the project's execution, **Agile methodology** will be used, with changes made for each sprint based on feedback and current market trends. | Project Manager | Approved | Agile Methodology with Scrum Framework. |
| **8** | The project costs will remain the same as they were first budgeted. | PM / BDE’s | Pending | Seek advice from team members who have worked on similar projects in the past. Use what you've learnt in the past to improve project estimates and budgets in the future. |

**2.4 In Scope Functionality (Current)**

 Uploading and collecting documents in the various formats that are available.

o .PDF

o .TXT, .DOC, .DOCX

o .JPEG, .PNG

o .XLS, XLSX

 Third Party Cloud Integration (Google Drive, One, Drop Box)

 Customizable Widgets on Dashboard.

 Role Based Permissions

 A user guide in the form of a “**Help center**” will be offered so that users may see how each feature works with relevant examples.

 Storage limits for members/external members/folder.

**Out of Scope Functionality (Current)**

 In-built Editor to edit the documents(.pdf,.docx,.xlsx) within the Web Application,

 Optical Character Recognition

 Digital Signature (Like DocuSign Software)

**2.5 Process Overview**

**2.5.1 AS -IS Process**

Property records, insurance documents, bank account information, Will documents, equity and debt information are all reported to be missing, as the majority of these are digital documents housed in a variety of folders or drives to which only the person who died has access.

**2.5.2 TO-BE Process**

Using the Asset Safe web application, The document owner can securely preserve all documents with shared ownership, and it helps in assisting the deceased's family in learning about all financial information and reducing the time it takes to obtain necessary financial assistance.

Asset Safe will have features that allow family members to see the financial status of the family by looking at the dashboard, reports, and widgets. Aside from that, each document will be linked to information templates, making it much easier for anyone to keep track of the status of their property, insurance, or debt paperwork.

# 3. Specific Requirements

# 3.1 Tools & Techniques

**3.1.1 Web app designs**

* Balsamiq/Sketch/XD/figma
* Illustrator/ AXURE RP 9

**3.1.2 Web App development**

* .NET, C#
* CSS, CSS3
* Bootstrap
* HTML, HTML5
* MVC (Model-view-controller)
* MYSQL
* jQuery/Vue.js/React.js
* JavaScript
* XML

**3.1.5 Web Services**

* REST **(**Representational State Transfer)

**3.1.6 Server hosting**

* Linux hosting

**3.1.7 Testing**

* Bitbucket/Jira/GitHub

**3.1.8 Team management**

* Bitbucket/Jira/GitHub

## 3.2 External Interface Requirements

### 3.2.1 User Interfaces

UI will be available in Three languages i.e., English, Hindi & Telugu.

### 3.2.2 Hardware Interfaces

1. **For web application**

***Minimum*** Requirements:

|  |  |  |  |
| --- | --- | --- | --- |
| **Client Side** | | | |
| **Browser** | Processor | Ram | Disk space |
| **Microsoft Edge, Mozilla, Chrome, Safari** | Intel Pentium III | 2 GB | 64GB |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Server Side** | | | | | | |
| Server | Processor | Model | vCPU | Mem (GiB) | Instance Storage | Dedicated EBS Bandwidth (Mbps) |
| AWS EC2 | 3.0 GHz Intel Xeon Platinum processors with new Intel Advanced Vector Extension 512 (AVX-512) instruction set | 4 GB | 2 | 4 | EBS -Only | Up to 3,500 |



### 3.2.3 Software Interfaces

1. Client on intranet: Web browser, operating system any.
2. Web Server: AWS EC2, operating system Linux.
3. Data base server: MYSQL

### 3.2.4 Communications Interfaces

1. Client (Admin) on internet will be using HTTP/HTTPS protocol.
2. Client (Members/Other Roles) on internet will be using HTTP/HTTPS protocol.

## Requirements

* + 1. **Asset safe Standalone Features**
* **The following features are available in Asset Safe Web app but not in Google Drive.**
* Activity Dashboard
* Activity Tracking
* Archiving & Retention of Data
* Commenting of files / Notes
* Customizable Information Templates
* Customizable Fields/Data Types
* Customizable Brand/Icons/Themes/UI & UX/Features
* Customizable Password Policy
* Real Time Notifications
* Reporting & Statistics
* Member tagging through comments (Group folders)
* Member/External Member Management
* Third Party Integrations (While Importing file/folders to My folders/Group Folder)
* Google Drive
* Drop Box
* Microsoft One Drive
  + 1. **< Requirements or Features #AdminConsole #WebApp >**

This section describes specific features of the **Asset Safe** Project.

\*\*\*\*\* **NOTE -** All the requirements in this document are quite high level and do not include any Acceptance criteria for each user story. The primary purpose of this document is to write high-level features that are required to solve the shared ownership document storage challenge.

* **Prioritizing** requirements can be done at the time of gathering or later, based on the goals.

|  |  |  |
| --- | --- | --- |
| **Req. ID** | **Features / EPIC** | **User Stories/Scenarios** |
| **1.0** | **Landing Page:**   * Sign In as Admin (Button) * Sign In Through OTP * Forgot Password | **As an** Admin, **I should be** able to login to the Web app through any of the mode. |
| **2.0** | **Sign In:**  Asset Safe web App will consist of a very simple quick step as under:   * Email * Password * OTP (if opted for OTP) * Enter Password, Confirm Password (via password reset link & will be back to landing page upon successful completion of setting password as per guidelines). | **As an** Admin, **I should be** able to login to the Web app by OTP.  **As an** Admin, **I should be** able to login to the Web app Via Password.  **As an** Admin, **I should be** able to login to the Web app by using forgot password option.   * An email will be sent to user’s registered email with a password reset link. * **User will be able to access the dashboard after successful login.** |
| **3.0** | **Dashboard:** A dashboard for Asset Safe web App is a visual representation of all your data. While it can be utilized in a variety of ways, its primary goal is to enable quick access to information, such as KPIs.   * Document Activities of all Members   Such asPreview, Upload, Create, Edit, Download.   * Storage (How much utilized by each)   Which Folders occupied most, etc.   * Members * Group Folders by Usage * KPIs (It’s configurable, allowing you the ability to choose which data you want to see). * Analytics (Measures will be taken from **information templates fields**)   \*\*\*\*\*\*\*\*\*\* **POINTS**:   * The live financial dashboard can be shared automatically to specified members/external members on a weekly/monthly/quarterly basis by the admin. (Will have settings for this). * The best practise is to maintain all documents pertaining to the entire family in a Group folder, so that in the event of an emergency, family members will have access to correct reports and insights, as well as supportingdocuments and information. | **As an** Admin, **I Want to** have visibility to all document's visual representations of metrics, such as charts and graphs.   * Admin can track all metrics.   **As an** admin, **I should be** able to send the Dashboard status (cannot be edited) to the members.   * A link will be sent to the members upon sending and will be notified through notification.   **As an** Admin, **I should be** able to modify my dashboard widgets as I see appropriate.   * OOB widgets and stats are statics default widgets that cannot be removed; they can only be filtered to display the necessary data for a specific measure. * Customizable widgets, on the other hand, can be added or removed by categorizing documents such as property, liabilities, life insurance, and so on. * A dashboard usually sits on its own page and receives information from a linked database (Fields/Folders).   **As an** Admin, **I want to** have the refresh option at the top, **So that** I can see latest metrics in all widgets. |
| **4.0** | **Notifications:** Notifications are messages that appear in a heads-up format on a Asset safe web App and assist in delivering timely and relevant information to Admins / members when they are not actively using the web Application. | **As an** Admin, **I want to** receive notifications when others add comments, mentions, Request Access **So that** I am up to date.  **As an** Admin, **I want to** have a clear all button in the notifications tab, **so that** I can remove old notifications.  **As an** Admin, **I want to** have a feature that allows me to filter notifications by category, **So that** I can only see notifications that are relevant to category. |
| **4.1** | **Global Search:**  The Asset Safe web app will have a global search feature that will search for documents, files, and folders across the entire system. | **As an** Admin, **I should** be able to search for relevant documents, files, and folders located throughout the system, **So that** I can find the right document without having to look through individual folders. |
| **5.0** | **Side Navigation Options: User will see following options on SIDE NAVIGATION bar of the Web App:**   1. **Dashboard** 2. **Members** 3. **Group Folders** 4. **External Users** 5. **Track Activity** 6. **Information Templates** 7. **Settings** | **As an** Admin, **I want to** have full rights to the side navigation to access the features I'd like to use. |
| **6.0** | **Members:**  The Asset Safe web App will allow you to invite trustworthy family members with appropriate roles when providing the invite link. | **As an** Admin, **I want to** send the invite link along with relevant roles to trustworthy family members, **So that** they can register for an account for the Asset Safe web app.   * Admin will have the power to alter the role as needed, as well as delete (or suspend) members at any moment. * Admin can establish member preferences such as which documents/folders/files he can access, view, update, and delete.   **As an** Admin, **I should be** able to search the members using filters (Active, Invited, Suspended, Deleted Members). |
| **7.0** | **Group Folders:**  All Asset Safe web app members will have access to Group folders (Admin can customize permissions individually later). They're like universal file folders. All-important metrics, statistics, and graphs linked to Group folders are also visible in the members dashboard. | **As an** Admin, **I should be** able to search the Group folders through search or using filters.  **As an** Admin, **I should be** able to Create Group folders.   * If one of the family members wants to save his/her bank statement/salary slip of employment in the Salary accounts/Finance track folders, the admin(owner) will have the flexibility to provide the formats that folder accepts. Like .pdf only in this case. * Set storage limits (if feasible)   **As an** Admin. **I should be Able to** Tag Member/External Members to Group Folders/File via comment. |
| **8.0** | **External Users:**  External members will be able to be invited to **Asset Safe web App**, and members will be able to collaborate with them. External members will have **limited roles and access** than internal team members.   * **Best Practice** - External members should always be individuals who are not family members but whom you trust to assist you in addressing conflicts in the event of an emergency on behalf of your family. | **As an** Admin, **I should be** able to Invite external members to join our group.   * They can be invited for a limited time by specifying an expiration date for access for a particular role (viewer * Once your External users accept the invitation, they will be able to access your Asset Safe account (Member portal).   **As an** Admin, **I should be able** to add external users with the Organizer, Editor, or Viewer roles to the appropriate Group Folders.   * He won't be able to access any files or folders unless he granted folder access.   **As an** Admin, **I should be able** to Provide or remove access to Group Folders anytime   * Depending on the owner's convenience, account expiration, suspension, or deletion of External users can be changed. |
| **9.0** | **Track Activity:**  Asset Safe web App Generates a report on any group member's activity for a given time period.  If necessary, you can also export the prepared report for legal purposes. | **As an** Admin, **I should be able** to use filters and see the person's activity history across all the group's files and folders. |
| **10.0** | **Information Templates:**  Information Templates will be used to create the custom fields that are required. These templates will be associated to the relevant files.  - If the house property digital document is uploaded, you can give a template to it that contains all the required data, such as property values, acres, cents, owner of property, date of acquisition, property tax, and address.  - As a result, this serves as supporting Asset information, as well as a digital document, so you don't have to wade through 30 to 40 pages to understand about it.  It is solely for the purpose of the information contained in that document. This is a key feature of the Asset Safe Web App that assists in the creation of reports, KPIs, Custom Widgets, and Graphs in Dashboards. | **As an** Admin, **I should be able** to create information templates.    **As an** Admin, **I should be** able to create custom fields with the ability to pick from a variety of data types (as required).  Example -   * Owner of property is **TEXT** * Property Value is **INTEGER**   **As an** Admin, **I want** to have search option to find the template.   * Any field deletion will have a direct impact on the Dashboard. When deleting a field, the administrator should be warned of the consequences. |
| **11.0** | **Settings:**  Only the Admin console has a setting feature, which is an adjustment in the enabling/disabling features for Asset Safe web App that modifies it to the user's preference.   * Content (Language Settings) * Role & Permissions * Sharing * Security * Retention of Data * Storage * Format Settings | **As an** Admin, **I want** to have an option to change the language of the whole Asset Safe Web App.   * Changing the language of the Admin's portal can also change the language of the member's portal. However, when a member signs in, he or she will be prompted to continue in which language (Either Admin chosen or Personal choice).   **As an** Admin, **I want** to have an option to set who can create Public Group Folders.  **As an** Admin, **I want** to have an option to set who can create Private Group Folders.  **As an** Admin, **I want** to have an option to create custom roles & permission settings (Authorization).  Example:   * View * Comment * Download * Share * Restore * Create/Upload * Edit files * Move files/folder within group Folder * Add/Remove Group Folder members * Delete Group Folder * Delete files and folders from Group Folder trash * Move File/Folder outside Group Folder   **As an** Admin, **I want** to have an option to set (enable/disable) sharing options.   * Allow files and folders to be shared outside group. * When enabled Admins can choose to enable or disable external sharing within their Group Folders. * Enable/Disable password when sharing (without providing password u can’t send (or) collect any documents). * Expiration Period Option. (If any member or external member fails to submit a password when receiving. The document that was shared with you has run out of time. It must be sent again by the member/admin).   **As an** Admin, **I want** to have an option to set custom options for Password Policy(for login and folders), Two-Factor Authentication, Allowed IP’s.  **As an** Admin, **I want** to have an option to set retention of data options to save storage and protect data.   * Whether the files should be permanently deleted or saved in the trash. * How long do they have to stay in the trash if they're saved?   **As an** Admin, **I want** to have an option to set storage limits for members/external members/folders.  **As an** Admin, **I want** to have an option to specify which formats the system should allow for specific Folders/Members/External Members,  **As an** Admin, **I want** to have an option to specify completely enable/disable that format file for upload in Asset safe web app. |
| **12.0** | **Document Viewer**  A document viewer/image viewer is a feature in the Asset secure web app that allows you to open a document within the web app itself. It functions similarly to Adobe, MS Word software.   * Admins, members, and external members will all be able to use this feature. * You can't modify anything inside the document (of course, scanned documents aren't editable), but any other PDF, WORD,.xlsx, and so on Documents are not editable. * You can only look at the data it includes. Information templates aid in the storage of relevant document data. You have the option to edit information based on the permissions that members have. * **It is just the inbuild feature that Asset safe web App should have by default. We are not currently offering it as a customizable option.** | **As an** Admin, **I want to** have a document viewer feature, **So that** I can view the document directly in the web app without having to download it. |
| **13.0** | **My Profile:** Admin/member will be able to view and update their profile basic information.  Edit profile will allow the Admin/Members to update personal information as given below:   * Profile Picture * Name * Email * Phone number * Address   \*\*\*Any edits to member/external member profiles will be reported to the administrator, who must approve the changes. | **As an** Admin, **I want to** have a feature to view/update my information according to my own preferences. |
| **14.0** | **Logout:** Admin will be logged out from his/her account. |  |

* + 1. **< Requirements or Features #Member #WebApp>**
* All users, including administrators, have access to the Member Portal. However, only the Admin login has additional privileges, while the rest features are same to all members.
* Once login, Admin will be logged into the Admin interface, and upon clicking on the Member portal, he will be logged into it. Admins will have access to the dashboard in both the Member and Admin portals.

|  |  |  |
| --- | --- | --- |
| **Req. ID** | **Features / EPIC** | **User Stories/Scenarios** |
| **1.0** | **Landing Page:**   * Sign In as Admin (Button) * Sign In Through OTP * Forgot Password | **As a** Member, **I should be** able to login to the Web app through any of the mode. |
| **2.0** | **Sign In:**  Asset Safe web App will consist of a very simple quick step as under:   * Email * Password * OTP (if opted for OTP)   Enter Password, Confirm Password (via password reset link & will be back to landing page upon successful completion of setting password as per guidelines). | **As a** Member, **I should be** able to login to the Web app by OTP.  **As a** Member, **I should be** able to login to the Web app Via Password.  **As a** Member, **I should be** able to login to the Web app by using forgot password option.   * An email will be sent to user’s registered email with a password reset link.   **User will be able to access the dashboard after successful login.** |
| **3.0** | **Dashboard:** A dashboard for Asset Safe web App is a visual representation of all your data. While it can be utilized in a variety of ways, its primary goal is to enable quick access to information, such as KPIs.   * Document Activities of all Members   Such asPreview, Upload, Create, Edit, Download.   * Storage (How much utilized by each)   Which Folders occupied most, etc.   * Members * Group Folders by Usage * KPIs (It’s configurable, allowing you the ability to choose which data you want to see).   Analytics (Measures will be taken from **information templates fields**) | **As a** Member,  **I Want to** have visibility to Group Folder/My Folders document's visual representations of metrics, such as charts and graphs.   * Only the stats of an Authorized document can be tracked by a member.   **As a** Member, **I should be** able to send the Dashboard status (cannot be edited)to the other members/Admins.   * A link will be sent to the Admin / members upon sending and will be notified through notification.   **As a** Member, **I should be** able to modify my dashboard widgets as I see appropriate.   * OOB widgets and stats are statics default widgets that cannot be removed; they can only be filtered to display the necessary data for a specific measure. * Customizable widgets, on the other hand, can be added or removed by categorizing documents such as property, liabilities, life insurance, and so on. * A dashboard usually sits on its own page and receives information from a linked database (Fields/Folders).   **As a** Member, **I want to** have the refresh option at the top, **So that** I can see latest metrics in all widgets. |
| **4.0** | **Notifications:** Notifications are messages that appear in a heads-up format on an Asset safe web App and assist in delivering timely and relevant information to Admins / members when they are not actively using the web Application. | **As a** Member, **I want to** receive notifications when others add comments, mentions, Request Access **So that** I am up to date.  **As a** Member, **I want to** have a clear all button in the notifications tab, **so that** I can remove old notifications.  **As a** Member, **I want to** have a feature that allows me to filter notifications by category, **So that** I can only see notifications that are relevant to category. |
| **5.0** | **Global Search:**   1. The Asset Safe web app will have a global search feature that will search for documents, files, and folders across the entire system. | **As a** Member, **I should** be able to search for relevant documents, files, and folders located throughout the system, **So that** I can find the right document without having to look through individual folders. |
| **6.0** | **Side Navigation Options: User will see following options on SIDE NAVIGATION bar of the Web App:**   1. **Dashboard** 2. **My Folders** 3. **Group Folders** 4. **Collect Files** 5. **Files Shared** 6. **Track Activity** 7. **My Profile** 8. **Favorites** 9. **Recent Files** | **As a** Member, **I want to** have full rights to the side navigation to access the features I'd like to use. |
| **7.0** | **2. My Folders:**  “My folders” in the Asset Safe web app is purely private folder that can only be accessed by the member who created it, but folders/files can be shared with other members. And a member can move the folder entirely to the group folder, where it will be accessible to everyone in the group. | **As a** Member, **I should be** able to create folders.  **As a** Member, **I should be** able toupload files/folders.  **As a** Member, **I should be** able to import files through Third party integrations.   * Members will be able to perform operations on folders such as moving, sharing, deleting, and downloading, ETC…. These actions will be available, depending on the role's permissions.   **As a** Member, **I should be** able to associate information templates to the files/folders, **So that** I can keep track of status of properties, liabilities, accounts, etc...  **As a** member, **I should be** able to add notes/comments to files/folders **so that** I am aware of the document's summary and any reminders.  **As a** member, **I should be** able to see digital documents/files within the web app **so that** I can get a complete picture of the document. |
| **8.0** | **3. Group Folders:**  **"Group Folders" in Asset safe web App is completely public anyone can access the information if member is part of group.**  Documents that the entire family should be aware of can be stored here, and files in these folders can be linked to information templates, which can be used to generate custom widgets, KPIs, reports, graphs, and more.   * Other distinctions between "My folders" and "Group folders" include: - Only the Admin can create the group; others can only share and access the folders based on the Authorization. * If an administrator wishes to prevent some users from viewing documents for prospective uploads, he can create a separate group with the members he desires. * Members can only associate information templates in group files with the approval of the administrator. (**Reason**- If not accepted, it has an influence on the entire system's Reports/Dashboard) | **As a** Member, **I should be** able to create folders.  **As a** Member, **I should be** able toupload files/folders.  **As a** Member, **I should be** able to import files through Third party integrations.  **As a** Member, **I should be** able to associate information templates to the files/folders, **So that** I can keep track of status of properties, liabilities, accounts, etc...  **As a** member, **I should be** able to add notes/comments to files/folders **so that** I am aware of the document's summary and any reminders.  **As a** member, **I should be** able to see digital documents/files within the web app **so that** I can get a complete picture of the document.  **As a** member, **I should be** able to add notes/comments to files/folders **so that** I am aware of the document's summary and any reminders.  **As a** member, **I should be** able to see digital documents/files within the web app **so that** I can get a complete picture of the document.  **As a** member, **I should be** able to tag member/external members/admin to group files/folders via comment. |
| **9.0** | **4. Collect Files**  At some point, any tracking for finance will require document collecting. Asset Safe allows you gather and manage information securely, whether you're collecting pay slips, bank statements or any personal expense documents from members, Equity or Bond documents from external members/partners, etc.  Set up a folder to keep all the uploaded files, set submission deadlines, and upload file size and quantity limits.  The files that one member uploads will not be viewable to another user. You can be notified through notifications whenever someone uploads a file   * In the event that a member wishes to receive files from someone who does not have access to the Asset Safe Web App, we will send external sharing links. He/she will be asked to submit the requested document upon clicking the shared link in his email. * If desired, you can request user information such as a user's name, phone number, and email address. * This improves security by preventing everyone from having access to the web app. | **As a** member, **I should be** able to invite members/external members to upload the documents **So that** I can acquire the documents I need  **As a** member**, I should** be able to invite other members (who do not have access to Asset Safe) to submit documents **so that** I can acquire the documents I need without having to provide credential or access to Asset Safe.  **As a** member, **I should be** able to set limit on upload file size **So that** I can conserve storage space by not using it unnecessarily.  **As a** member**, I should be** able to specify the location of submitted files **So that** I can keep track of them**.**  **As a** member**, I should be** able to set an expiration date for the link I'm going to share, **so that** no one else can share docs after a certain amount of time has passed. |
| **10.0** | **5. Files Shared**  Through this module, the Asset Safe web app will be able to keep track of any documents (such as which document, when, and by whom) that have been shared with you or group folders.   * All documents will be saved in the folder provided by the member when sharing the upload link. However, this feature's sole purpose is to keep track of shared items across the entire Asset secure web app. | **As a** member, **I should be** able to see all the details of the documents shared with me **So that** I can keep track of them and be informed of them.  **As a** member, **I should be** able to get real time notification upon receiving the document.  **As a** member, **I should be** able to search the documents using various filters. |
| **10.1** | **Uploading & Sharing Document**  The user sharing the document will only be able to upload files from their own local system.  When sharing a document to the Asset Safe web app, there is no room for third-party connections.  Members with access to the Asset Safe web app can upload from My Folders/Group Folders.   * Two Types of Links:   + - 1. For Members       2. For Outsiders * Any constraints imposed when sharing the link will be applied here, such as file size, format, and quantity. | **As a** member, **I should be** able to upload the files from my folders/group folders.   * Require Sign In   **As an** outside member, **I should be** able to upload the files from my local system. |
| **11.0** | **6. Track Activity:**  Asset Safe web App Generates a report on any member's activity for a given time period.  If necessary, you can also export the prepared report for legal purposes. | **As a** member, **I should be able** to use filters and see my activity history across all the group's files and folders. |
| **12.0** | **7. My Profile:** Member will be able to view and update their profile basic information.  Edit profile will allow the Members to update personal information as given below:   * Profile Picture * Name * Email * Phone number * Address   \*\*\* Any changes made by members or external members must be approved by the administrator.  \*\*This option will be available in the Admin Console for Admins. | **As a member**, **I want to** have a feature to view/update my information according to my own preferences. |
| **13.0** | **Favorites:**  All files that have been marked as favorites will be displayed under this feature. Favorites for folders/files can be maintained by members.  There are no limitations on the number of favorite files/folders you can have. it is private; no other member can see other member's favorites even if the files/folder is from Group.  \*\*\* If Admin/members (who are authorized to remove) removes a document from the Group folders, it will also be removed from your favorites. |  |
| **14.0** | **Recent Files:** The feature will display all recently opened files. |  |
|  | **Logout:** Admin/Members will be logged out from his/her account. |  |

## Wire Frame

* A sample wireframe of the High-Level Admin Console's Dashboard.

**HOW WIDGETS WORK IN ASSET SAFE:**

Members will be asked to choose between file and folder level widgets when creating custom widgets. After that, all the information fields associated with that folder will be obtained as possibilities for choosing what to display. The member will select which metrics to display in the dashboard, and whenever that folder is updated, the widget will be updated as well.

**Example:** Every financial year, a folder named debts is maintained by a group member (family members). Debts can come from various places, including a bank, a chit fund, a personal loan, and a credit card. They'll be kept in the Debts folder as individual files. It's associated to an information template. Now the owner wants to know how much debt the family has accumulated over the course of the fiscal year from all sources.

**Fields can be in Debts Folder Information Template:**

* **Name**
* **Sources**
* **Loan Amount from Each source (Multiple fields)**
* **Period – year/month/quarter**
* **Member**
* **Member’s debt source -** (while choosing this field the above specified sources will be obtained in this dropdown.)
* **Member Owned Debt -** The above-mentioned amount from each source will be retrieved when you select this field**.**
* **If a bank is chosen as a source,** **If members have $10,000 in bank debt, a $10,000 debt loan must be partitioned to other family members. It functions as a trigger point.**
* **If Vishal owes the bank $600, only $400 can be divided among the other members.**