Revision & Sign-*off* Sheet

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# Introduction

## Project Summary

### Background

* The Client from Malaysia owns a digital print company that allows custom designs to its users for products like business cards, envelopes, letterheads, greeting card, postcard and similar.

### Objectives

* The entire purpose of developing this system is to streamline the process of event invitation, attendance and follow up for event organizers.
* Given that the system can be used by event organizers as well as the staff, it would reduce admin overhead by giving system access to multiple stakeholders.

# Business Requirements

## System Stakeholders (Roles)

|  |  |
| --- | --- |
| Stakeholder | Responsibility |
| Event Organizer | Event organizers are the primary system users who create and manage events, import guest databases and view reports |
| Admin | Admin is the user role having access to the whole of the system. Admin is primarily responsible for creating user accounts and can also perform all the tasks that can be performed by the admin. |
| Admin Staff | The staff plays an important role of taking attendance by scanning QR code or marking manually. They are also allowed to enter guest details manually. |

## Functional Requirements

|  |  |  |  |
| --- | --- | --- | --- |
| 1. User Management | | | |
|  | Create and Manage Users | | Admin staff and Event Organizers: Admin will be able to create and manage admin staff accounts. The login credentials as set by the admin will be externally passed to the admin staff. Following details should be added:   * User Name * Contact Detail * User ID * User Role (Select from drop down with options as admin staff and event organizer)   **Note:** For each new user created, a pseudo password will be generated by the system which the admin can view. |
|  | Update / View User Details | | The admin will also be able to update the details of the users already created.  They will not be able to change the login ID. |
|  | Delete Users | | Admin will be able to delete the user account created. Post deletion of the account, the login ID will not be reusable. |
| 1. Authentication | | | |
| 2.1 | Login | | Event Organizers and admin staff will be able to login to the system using the valid credentials as passed by the admin |
| 2.2 | Forgot Password | | All users will be able to recover their lost password if they click on forgot password link. An email will be sent on their registered email address with the reset password link. |
| 2.3 | Change Password | | All users will be able to change their password from their profile page. Password will be changed with the fields of “Old Password”, “New Password”, and “Confirm Password”. |
| 2.4 | Profile Management | | All the users will be able to view/edit their basic profile details. |
| 1. Event management | | | |
| 3.1 | Add Event | | Admin and event organizers will be able to create event and add details.  Admin and event organizers will also be able to set the label relating the guest placement (example table, seat, zone, etc.) and this same info will be used for that specific event created.  Note: The admin will be able to add a limit for the number of events each event organizer can add. |
| 3.2 | View List | | Admin and event organizers will be able to view the list and details of the events added |
| 3.3 | Edit | | Admin and event organizers will be able to make changes to the information of the event added |
| 3.4 | Delete | | Admin and event organizers will also be able to remove the event added. This will also remove the reminders set respective to the event |
| 3.5 | Import Guest Database | | Admin and Event Organizers will be able to import guest database in a pre-defined format and a set of pre-decided fields that could be: Number of guests, Names Guest Placement Contact Number Lucky draw number  The admin and the event organizers will also be able to add a 5-6 new fields as required for the event. The labels for these fields will be decided by the admin and it can be used while importing guest database.  Note:   1. There can be multiple guests against single table number  Based on the guest details entered, the system will generate a QR Code. 2. Event Organizers will be able to select their respective event and later perform the specific function. |
| 3.6 | Update Survey URL | | Along with the guest database, the admin and the event organizer will also be able to upload the URL for the survey that is to be mailed to the attendees of the events. |
| 1. Reminder | | | |
| 4.1 | Set Reminder | | Admin and Event Organizers will be able to set reminders for specific date and time prior to the date and time of the event. |
|  |  | | System will show reminder notification to the admin showing the event name, date and time.  Note: Standard system Reminders are set before the date of the event |
| 1. Email Services | | | |
| 5.1 | Send Email / SMS Blast | | Admin and Event Organizers will be able to send the system generated QR Code to all the guest users of the selected event. SMS will contains the QR code link.  Note: Standard email template to be considered |
|  | Email for Table Number | | As soon as the QR Code is scanned or attendance is added manually, the system sends Email / SMS to the attendees telling them about their table number and lucky draw number |
| 5.2 | Email for Survey | | After the event, the system will send an email with the survey form link This will be a scheduled email sending. The system will read the URL entered at the time of importing guest database and will automatically send the email to all the attendees after the event time has been crossed |
|  |  | | Note: Standard email template to be considered |
| 1. Reports | | | |  | Automatic Notification: Users will receive notification for the URL and login credentials |
| 6.1 | View Report | | The event organizers will be able to view reports specific to the events they have added to the system:  • Number and List of Guests ( Invited / attended / absent) • Manually Registered Guests vs Scanned  Admin will be able to view the following reports:  • Number of Events (Completed / Upcoming) • Number of Guests ( Invited / attended / absent) • Manually Registered Guests vs Scanned • Registered Event Organizers |
| Note: Admin will be able to perform all the event organizers functions but will have a different dashboard and reports section. The tasks of Event management, importing guest database and setting reminders, sending email blasts will be done primarily by Event Organizers | | | |
| 1. Attendance Management | | | |
| 7.1 | | Select Event | The event organizers and the staff will need to select event from a dropdown that will appear first thing after login. |
| 7.2 | | View Event Details | The event organizers and the admin staff can able to view the details of the selected. It should show   * Event Name * Address * Event Organizer Name * Contact Number   For every event the staff and the organizers will also be able to view the  Event Attendees Details   * Name * Email * Phone * Table Number * Lucky draw number * Attendance Marked (Y / N)   The end of the list will also show the count of attendees in the real time. |
| 7.3 | | Scan QR Code | The staff will be able to scan the QR code (using a third party application outside the system).  After performing the scan, the users will be redirected to a screen where the users will need to login and only then the attendance screen will appear after login. |
|  | |  | After login, the users will be able to mark the attendance |
|  | |  | UC 5.1 will be followed after this activity. Note: Multiple Admin staff users will be able to select and add details to a single event at a time but the database will be centrally updated allowing no duplicate information capturing |
| 7.4 | | Mark Manual Attendance | The event organizers and the admin staff will be able to manually mark the attendance of the guest users in case they do not have the QR Code email / SMS with them. This would be a button in the list where they can click Present / Absent. UC 5.1 will be followed after this activity. |
| 7.5 | | Add Guest | At the time of event attendance, if there are users who doesn't have a QR code to scan, the event organizers and the admin staff will be able to manually enter their details into the system. Details to be added can be: Name   * Email * Phone * Table Number (Relevant Field Name) * Lucky draw number |

## Role Permission Matrix

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Requirement | Event Organizer | Admin | Admin Staff |
| User Management | | | | |
|  | Login / Logout | ✓ | ✓ | ✓ |
|  | Change Password | ✓ | ✓ | ✓ |
|  | Add User Account |  | ✓ |  |
|  | Delete User |  | ✓ |  |
| Event Management | | | | |
|  | Add Event | ✓ | ✓ |  |
|  | View List | ✓ | ✓ |  |
|  | View Details | ✓ | ✓ |  |
|  | Edit | ✓ | ✓ |  |
|  | Delete | ✓ | ✓ |  |
|  | Set Reminder | ✓ | ✓ |  |
|  | Import Guest Database | ✓ |  |  |
| Attendance | | | | |
|  | Scan QR Code | ✓ |  | ✓ |
|  | Add Manual Attendance | ✓ |  | ✓ |
| Email Management | | | | |
|  | Send Email Blast | ✓ | ✓ | ✓ |
|  | Automatic Email Notification |  | ✓ |  |
| Reports and Dashboard | | | | |
|  | Reports | ✓ | ✓ |  |
|  | Dashboard | ✓ | ✓ |  |

# Cross Functional Diagram

The process shown in the flowchart attached as Annexure displays 5 sub processes to complete the entire flow of the system. It goes as:

* Event Organizers create event and enter details, imports guest database from CSV and adds URL for survey to be sent to the guests, after the event.
* Upon adding the guest data, the system generates QR code and sends email / SMS to all the guest contacts added.
* The event organizer also sets up a reminder so that the system can remind them of the event at certain intervals of time prior to the event.
* At the event location, the admin staff marks attendance by scanning QR code or marking manually within the system in cases when the QR code is not present with them. For guests that are not in the list, the admin staff can also enter guest details. All these attendees will then receive the table number and lucky draw number details view email / SMS.
* Lastly, after the event is completed, the system automatically shoots email / SMS containing the Survey URL as added by the event organizer in the foremost activity of creating event.

## Project Scope

### Deliverables

We will provide below items as default deliverables:

* We will provide working application on promised staging/ production server as default deliverables.
* One-Time walkthrough demo/training of the overall system
* One month support for user acceptance testing and bug fixing as warranty

### Assumptions

* We will use the readymade theme.
* We will use <https://play.google.com/store/apps/details?id=com.scanner.kataykin.icamesscaner.free&hl=en_US> for browser based scanning requirement. This will eliminate manual process of taking photograph at the event venue.
* This third party application will work only when internet is connected because the user will then need to login and mark attendance.
* The users of the system must provide the permission to access the camera on their mobile.
* We will perform QA/Testing on one of the platform/OS which is recommended by client.
* We will perform functional and cross-browser UI testing on IE9, IE10, IE 11, Mozilla Firefox (latest two versions) and Google Chrome (latest two versions) as per bootstrap framework support.
* Any type of third party tool/API integration will be purchased by client and respective credentials will be provided to Radix to facilitate the development cycle.
* For importing Guest database, we have only considered the .csv file format with the specified columns.
* For Reminder, windows scheduler runs every day and send as per the date matches with the current date. Reminder date always be current date or future date. Reminder will not be configure for time and it will be as per the date only.
* System will not implement any validations which targets the physical location for table mapping, table assignment. Only the table number will be shared via email that has nothing to do with the physical location.
* The responsibilities for both roles namely Event Organizer and Admin Staff will be predefined in the database. Super admin will have full access to entire site.

### Out of Scope

We have not considered to provide below items as default deliverables, if required then we can provide these items with additional cost on top of current commercials:

* Implementation of any type of workflow.
* Any support or consulting with hosting provider or any other 3rd party provider will be charged on time & material basis.
* Support for any languages other than English
* Payment Gateway Integration and Payment Processing
* Mobile application
* Third Party Integration for Survey
* Frontend website - CMS pages.
* Offline sync or working without internet
* Push Notification

### Risks

* System will work when the online connectivity is available. System will not work without internet.
* For QR code, if photo being captured is not clear then the process will need to be repeated until the QR code returns desired results.

# Appendix

# RadixWeb Contact Information

Radixweb, India.

30/B Adarsh Society,  
Near Kaashi Parekh Complex,   
Swastik Char Rasta, C G Road,  
Ahmedabad -380009  
Gujarat - India