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| Meshreq |
| Edexer Business Requirements Analysis and Specifications Description |
| Version 1 | 18-Nov-14 |

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# Document overview

## Introduction

As per agreement between Edex and Meshreq Computer Systems, Meshreq is implementing “Edexer” a contact management system for Edex. As a part of Meshreq responsibilities this document comes with the business analysis for Edex requirements about Edexer.

## Document purpose

* Defining and analyzing Edex requirement about Edexer
* Covering requirement for deployment phase 1

## Audience

* Edexer business team
* Meshreq technical team

## Notes

All data within this document and related documents are considered as confidential data and not allowed to be share without a signed agreement from both parties

This document will be followed with second part to define mobile requirements

# Requirement Overview



## Introduction

Edexer is aimed to enhance business engagement activities, explore opportunities and leverage business reputation. An application introduced in the form of hosted service derived by users’ subscriptions.

The app gives users capabilities to handle and manage their business cards and contacts in efficient way through three steps. First is data entry which is handled in multiple ways to give user the ease of data entry. Second is data processing and manipulation; user can perform his business operations like searching, sorting, eliminating duplicates, finding new contacts and so on. Third is retrieving or exporting data in a many formats to support various customer needs.

Service is provided in the form of plans or subscriptions for persons and corporates.

## Service due date

Delivery will be on two steps on 60 days as mentioned in the development time plan.

# Modules



## Users

Users are the main actors in Edexer. The user will provide information to be registered in the system. User can login then he can use all system features according his subscription type.



### Functionalities

* User attributes
  + First Name.
  + Last Name.
  + Email -> unique field, and required.
  + Password -> Required, Hashed.
  + Optional attributes (can be added in “edit my profile” section):
  + Mobile.
  + Phone.
  + Title / Position.
* Registration

Edexer has 3 Registration states:

* + Open
  + Closed
  + Invitation only

Registration status can be changed by Edexer staff members.

Registration requires Email and Password.

By default, registrations will be for the free subscription plan.

* Login options

User enters username and password.

A check box for “remember me”.

Option for account recovery “Forgot password? “.

* User Types
  + Staff: Internal Edex users.
  + Users: public users, main audience:
  + User. (Basic user)
  + Administrator (Can add other users or administrators, ex: for corporate accounts)

### Rules

Every user has One Business card.

Every user can have a maximum of two subscriptions at one time. (Free / pro / corporate)

## Business Cards

Business cards are the main resources for Edexer to manage. Users can create, edit, update, delete, search for and share business cards.

### Functionalities

* Attributes
  + First Name, Last Name.
  + Mobile (Multiple).
  + Phone (Multiple).
  + Fax (Multiple).
  + Email (Multiple).
  + Website (Multiple).
  + Address (Multiple).
  + Birthdate.
  + IM (Multiple).
  + Social Networks (Multiple).
  + Position.
  + Company.
  + Department.
  + Title.
  + Sector.
  + Tags.
  + Notes.
  + Creator. (User who created the card)
  + Subscription Type. (Free / pro/ corp.)
* Users can create, read, update and delete business cards
* Business card is added by user in his personal, corporate or both subscriptions

### Rules

* Every business card is related to one subscription.
* Fields are not required.

## Tags

Tags are used to make searching easier and helps in filtering. For every single business card there may be zero or more tags to mark this contact with this tag. Then tags are used within search filters.

### Functionalities

* Users can create, edit, update or delete tags.
* Tags are found inside business cards
* Tags can be used within search filters

### Rules

* Tags cannot be deleted if it is used by one business card or more

## Subscriptions

Subscriptions represents the user profile on the system. This profile carries user data related to his use, limits, plan, and privilege and so on.

### Functionalities

* Subscription attributes are
  + Type
    - Free  
      Free subscription is the default subscription upon sign up. It is limited to (to be determined).
    - Professional  
      The next upgrade for personal subscription from free to pro. Limits are opened and new features are added
    - Corporate  
      Corp subscription is for corporates or teams. Subscription is requested by a user then approved by staff member. This user will be account admin by default and can add other account admins
  + Status (Pending / Active / Suspended / Ended).
  + Start Date.
  + End Date.
  + Subscription date
  + Owner.
  + Last edit date
  + Last edit by
  + Last edit reason (look up)

### Rules

* User can have a maximum of 2 active subscriptions at a time. (Personal either free or Pro and corporate).
* Default: when a user registers on a non-free subscription its status will be pending, and subscription date is captured.
* Staff members can

1. Activate pending subscriptions.
2. Define Intervals between registration and account activation.
3. Manage start and end dates of subscriptions.
4. Create, edit, update and delete subscriptions.

* User can view his subscription details.
* User can cancel his pending subscription.
* For Corp subscription account admin can add other users as his team members to share the account contacts. This process occurs by sending invitations, by giving email addresses either one or more then:
* If the email is already registered on app he will be added directly
* If he is not registered he will be sent an invitation by mail to join (invitation message is configurable) then on his first sign in he is added to this subscription
* Account admins can edit users’ permissions. Each user has combination of countries and sectors in addition to permission to export business cards or not
* By default account admins have all permissions

## Search

Searching for business cards is a main advantage of Edexer, making it easy and fast to locate desired contacts.

### Functionalities

* Simple Search (any keyword).
* Advanced Search
* By any of Business cards attributes,
* Defining search scope
* Personal subscription scope
* Corporate subscription scope
* Edexer scope
* By card creation date.
* By creator.
* By Tags.
* Search Results: displayed in grid or list views, with Sorting.
* If Contacts resulting from search are not in user’s contacts, then the user sends them a request to share business card details, plus a note.
* User can export search results to Excel sheets upon given permission, if not granted permission so this functionality is disabled for this user.
* Each record in the search result has a mark representing his scope (Personal, Corporate or Edexer)

### Rules

* If the user defines search scope with Corporate, he can only search according to given permissions from account administrators.

## Import

Importing is the means to mass add business cards where user will be able to extract his business cards from external file.

### Functionalities

* User is able to upload excel file having the business cards
* User selects to which subscription he will add business cards (Personal, Corporate or both)
* User will be given a fixed template to fill in his contacts
* User can import his contacts from LinkedIn.

### Rules

* Limitations are to be set on the size of imported contacts, and is configurable by staff.
* Validation will be performed on the file format to match the template
* Duplicates will not be handled through this step and will run separately

## Export for Migration

Export functionality gives user the ability to take a copy of his contacts as excel sheet.

### Functionalities

* Export all business cards from business cards index
* Export business cards from search results
* Export file is in excel based format

### Rules

* User cannot export from his corporate subscription unless he is given permission to

## Check for duplicates

While adding business cards and uploading database of contacts there may be duplication in contact data. Duplication check eliminates this redundancy.

### Functionalities

* Check for duplicates in email and mobile.
* In case business card is imported from a file check is after import in a manual manner.
* In case business card is added one by one then check will be performed before adding
* When eliminating duplicates contact info will be added except for name and basic date. User has to check either leave old data or update.

## Administration

Administration module is the module used by Edexer staff users. Staff users have many roles and operations to keep Edexer running, give subscribers best service and to monitor Edexer status.

### Functionalities

* Create, update, edit or delete either Admins or Users.
* Check for pending subscriptions.
* Create, update, edit or delete subscriptions.
* Modify settings.
* Registration (open, closed or invitations)
* Upload file maximums
* Access and view application Dashboard and insights.

# Business Requirements Sign off

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| --- | --- | --- | --- | --- |
| Name | Title | Entity | Date | Signature |
| Saad Saleh | CEO | Meshreq |  |  |
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