Vision Document

Better Business Hero - Business Management System

Version 1.0

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Prepared By:

Kaitlyn Hardin

Johnathan Dickson

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course requirements

Revision History

Date	Version	Description	Author(s)
2/8/2021	1.0	Initial Vision Document Created	KH & JD

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Section 1 – Introduction

(1.1) Purpose

The purpose of this document is to outline the vision for the Better Business Hero (BBH) business management software system. This document aims to address the BBH system and the problem it addresses, stakeholders and users, potential business opportunities using the BBH system, and potential constraints in the development process.

(1.2) Scope

This vision document applies to the Better Business Hero (BBH) business management system, which will be developed by a small engineering team. The team will develop the BBH system to work on Microsoft Windows, with a future of expanding to Mac OS. The BBH suite aims to provide essential business management functionality for startups, small-sized, and some medium-sized companies. The system emphasizes financial reporting and inventory management, allowing businesses to focus on other business efforts such as marketing, customer relations, and branding.

Section 2 – Positioning

(2.1) Business Opportunity

Stakeholders and customers who implement the BBH suite into their business process will be provided with a streamlined method of financial reporting and inventory tracking. This will cut down errors of mishandling assets, liabilities, revenue, expenses, inventory and other essential business information.

(2.2) Problem Statement

Starting up a business is no small task. The problem most startup companies and small businesses face is the lack of an organized, cost effective, and efficient backend process (i.e. poor management of inventory, assets, expenses, revenue). The impact of this problem is that companies can run into potential issues of over or under reporting on financial reports, mismanaging inventory on hand, and even losing necessary documents without a place to store them. A successful solution to this issue would be to incorporate a software system that helps automate, create, and archive inventory sheets and financial reports.

Section 3 – Stakeholders and User Descriptions

(3.1) Stakeholder Summary

Name	Description	Responsibilities
Requirements Engineer	Works with customers to get feedback on incremental releases, translating feedback into future requirements	• Responsible for software evolution through feedback of users • Responsible for relaying the requested requirements to the development team
Software Developer	Primary player in development and system architect design	• Responsible for converting requirements into code. • Responsible for unit testing • Responsible for software maintenance

(3.2) User summary

Name	Description	Responsibilities
Employees	Primary End User, Security Level 1	• Clocking In and Out, to log payroll
Managers	Primary End User, Security Level 2	• Managing Inventory • Logging daily revenue and expenses • Verifying payroll
Owner	Primary End User, Security Level 3	• Same as Managers • Logging Liabilities and Assets
Financial Dept.	Primary End User, Security Level 4	• Same as Owner • Managing and Creating Financial Reports

(3.3) User Environment

The Better Business Hero system is designed to be utilized by a variety of users within a company, so that essential information can be relayed through the system. Because of the sensitivity of data, it is critical that security levels are put in place to limit access of certain users. The user environment will consist of security levels (SL) of 1 through 4 (SL1, SL2, etc.). Depending on security level, users will have certain privileges within the system.

The BBH system is designed as a stand-alone software system, intended to be ran on Microsoft Windows OS. In the future, there are hopes to expand this to Mac OS and Linux.

Section 4 – Product Overview

(4.1) Product Perspective

See Appendix (P.1)

(4.2) Summary of Capabilities

Customer Benefit	Supporting Features
Ease of inventory management	• Create and Manage live and old inventory sheets stored on a backend database (via access).
Ease of financial reporting	• Pull from logged financial info stored on a backend data base (via access). • Then export and import .csv files into and from the BBH system • Reports include: Balance Sheets, Income Statements, Cash flow Statements
Distribute and Determine Company Hierarchy	• Assign workers system privileges based on their security levels • Can update security levels at any time (via User Profiles Interface)

(4.3) Assumptions and Dependencies

Dependencies for effective system use:

- Required Applications:
    - Microsoft Access
    - Microsoft Excel

- User assumptions:
    - A user will be comfortable using the computer
    - A user will know their employee information

- A user will know how to navigate, log, and utilize system functionality.

Section 5 – Product Features

(5.1) Inventory Management Features

(5.1.1) CRUD Inventory Sheets

- Create, Read, Update, and Delete inventory sheets.
- Inventory Sheets can be archived.

(5.1.2) Archive Inventory Sheets

- Pull from archived inventory sheets stored in the backend database (via MS Access)

(5.1.3) Export Inventory Sheets as .CSV Files

- Export inventory sheets as .CSV files
  - Store files on the database
  - Import the files into MS Excel to visually see data

(5.1.4) Import .CSV Files into the system

- Future Increment – Hopes of importing .CSV files into the BBH system to edit files through the system Interface.
  - Would make the dependency on MS excel (optional)

- As of version 1.0, MS Excel is required for full functionality.

(5.2) Financial Reporting and Tracking

(5.2.1) CRUD Balance Sheets

- Create, Read, Update, and Delete balance sheets.
- Balance Sheets can be archived.

(5.2.2) CRUD Cash Flow Statements

- Create, Read, Update, and Delete cash flow statements.
- Cash Flow Statements can be archived.

(5.2.3) CRUD Income Statements

- Create, Read, Update, and Delete income statements.
- Income Statements can be archived.

(5.2.4) CRUD Asset Tracking Sheets

- Create, Read, Update, and Delete asset tracking sheets.
- Asset Tracking Sheets can be archived.

(5.2.5) CRUD Revenue Tracking Sheets

- Create, Read, Update, and Delete revenue tracking sheets.
- Revenue Tracking Sheets can be archived.

(5.2.6) CRUD Liability Tracking Sheets

- Create, Read, Update, and Delete liability tracking sheets.
- Liability Tracking Sheets can be archived.

(5.2.7) CRUD Expenses Tracking Sheets

- Create, Read, Update, and Delete expense tracking sheets.
- Expense Tracking Sheets can be archived.

(5.2.8) Archive Tracking Sheets & Financial Reports

- Pull from Tracking Sheets and Financial Reports stored in the backend database (via MS Access).

(5.3) Distribution of Authority and Privileges of System

(5.3.1) CRUD User profiles

- Create, Read, Update, and Delete user profiles based on security levels.
- User Profiles can be archived.

(5.3.2) Adjust Security Levels as Needed

- Adjust security levels as needed by tapping into user profiles.

Section 6 – Constraints

(6.1) Design Constraints

- Troubles exporting files into the correct .CSV file format

(6.2) External Constraints

- Errors in communicating with external software applications (Access and Excel)

(6.3) Dependency Constraints

- Not having the required applications – MS Access and MS Excel

Section 7 – Other Product Requirements

(7.1) Application Requirements

- Microsoft Access
- Microsoft Excel

(7.2) Platform Requirements

- Microsoft Windows OS

Appendix

Section D

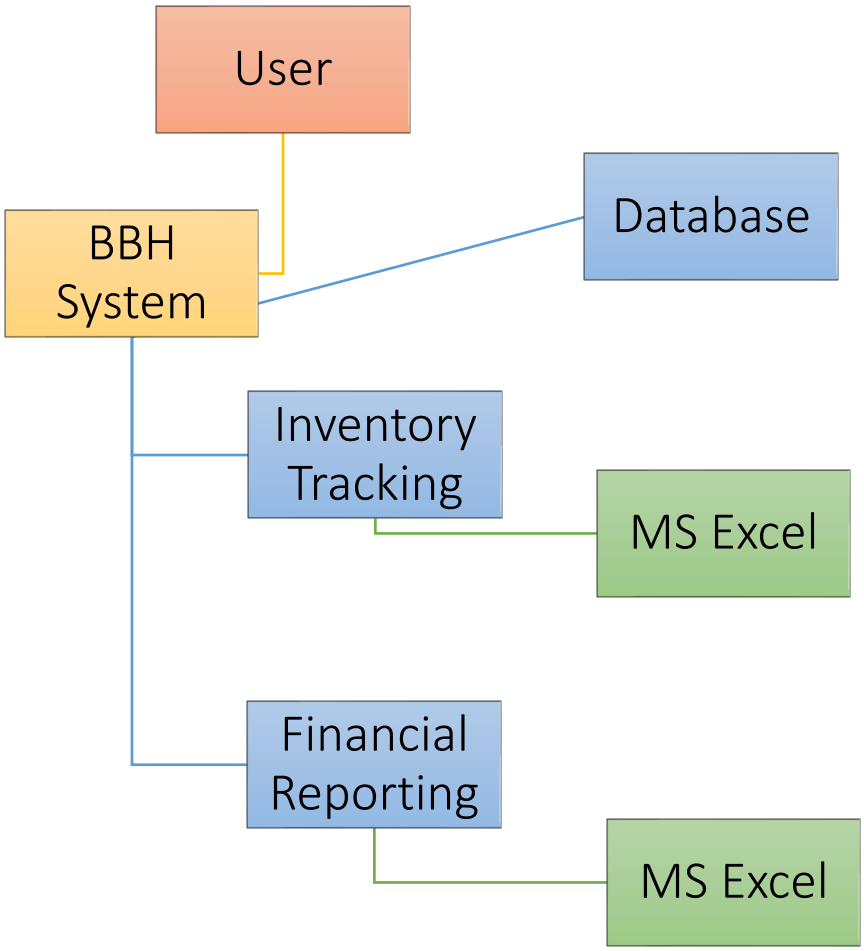
(D.1) – Definitions

(D.1.A) BBH

Better Business Hero System

(D.1.B) SL 1 - 4

Security Level X. Level 1 is the lowest security level, level 4 is the highest security level.

Section P

(P.1) – Product Perspective Diagram