



Survey Management System (Solution Requirement)

Survey Management System			
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Revised by	M.A, N.A	Approved by	J.C



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1. Objective

The objective is to procure in-house Survey Management System fully implementation at SINYAR premises. The survey management system Routine and repetitive surveys require a sophisticated and structured approach to the execution of the survey, management and reporting of the survey response data. The survey general structure includes the following:

S	Structure	Description
1	Survey	High level defining the purpose , minimum rate , maximum rate , survey type...etc.
2	Sections	Group of questions
3	Questions	Predefined question with a weight and list of answers. Answers options could have different formats (Lists/options, Dates, Text , Number...etc.)
4	Group/Department	Group of Department or Users

The survey will be executed against individual/department/vendor to collect, measure and evaluate performance of the individuals.

Once the survey is designed, the manager conducts an intermediate phase, which he selects the list of target participants/groups among which the survey will be distributed. Participants/groups are allowed to access to the newly distributed survey once they log on to the system and will be able to submit their evaluations for as long as the lifetime of the survey.

Whenever a Group/users provides his/her scoring values for each question in the survey form, the system stores score allowing for further analysis later on.

Based on the scoring provided by the Participants/groups. The system will provide a wide list of analytical powerful and decision-support reports that cover survey results. The reports can be generated from based on vendors, sites, service type ...etc.

2. Targeted Deliverables:

- easy-to-use tool to create, analyze and deploy questionnaire, surveys and reports quickly.
- The solution will have responsive web app.
- Proposers should have proven capability to develop, implement, support, operate and maintain a secure, end-to-end web-enabled applications.
- The data security for the applications, system and interfaces shall employ the most current industry techniques to ensure that all data is safeguarded from unauthorized access or use and programs are protected from any know cyber-attack or computer virus.



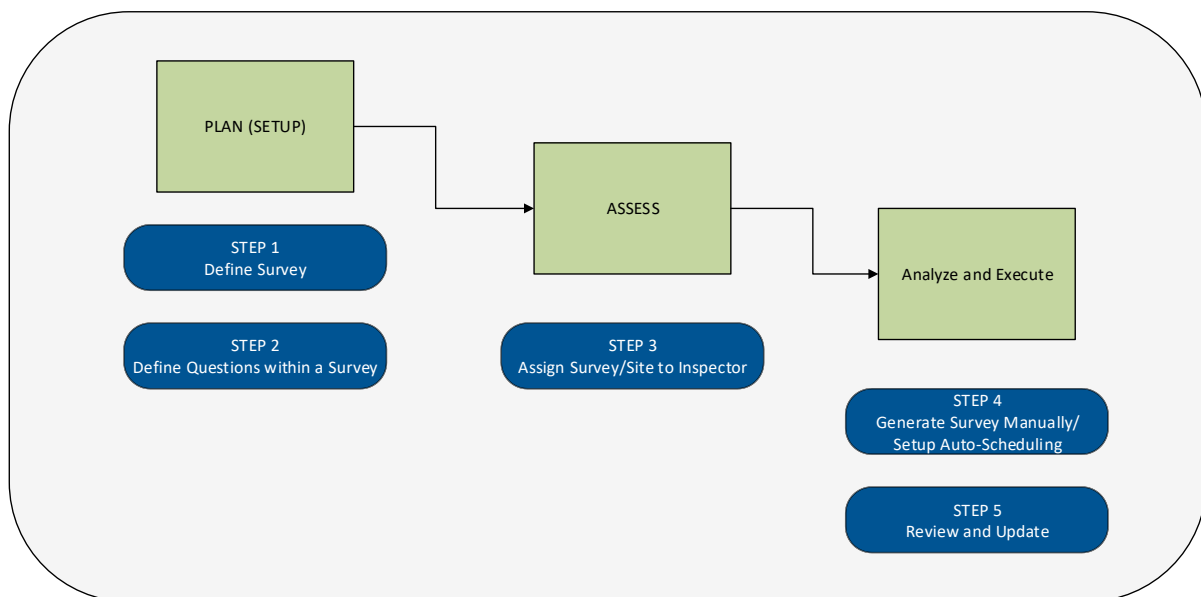
- Source code for both Web applications.
- Provide respondents with graphical and text-based feedback in real-time.
- Proposers are required to respond to below requirement with three sections: a technical proposal, commercial proposal and timeline.

3. Summary of functional Requirements

- Categorize the Survey based on the business unit/ departments.
- Categorize the Survey based on the Activity Type.
- Survey can be generated based for both Sites or Projects.
- Build a standard rating system for all surveys.
- Communicate the Survey result and score with any 3rd party through emails.
- To provide ad-hoc reporting system based on the survey results:
 - Management reporting (dashboard)
 - End User (Printable and Downloadable excel and PDF format)
 - PDF, XLSX , DOCX. reports sent to any 3rd party through Email

3.1 Survey Management Process Overview

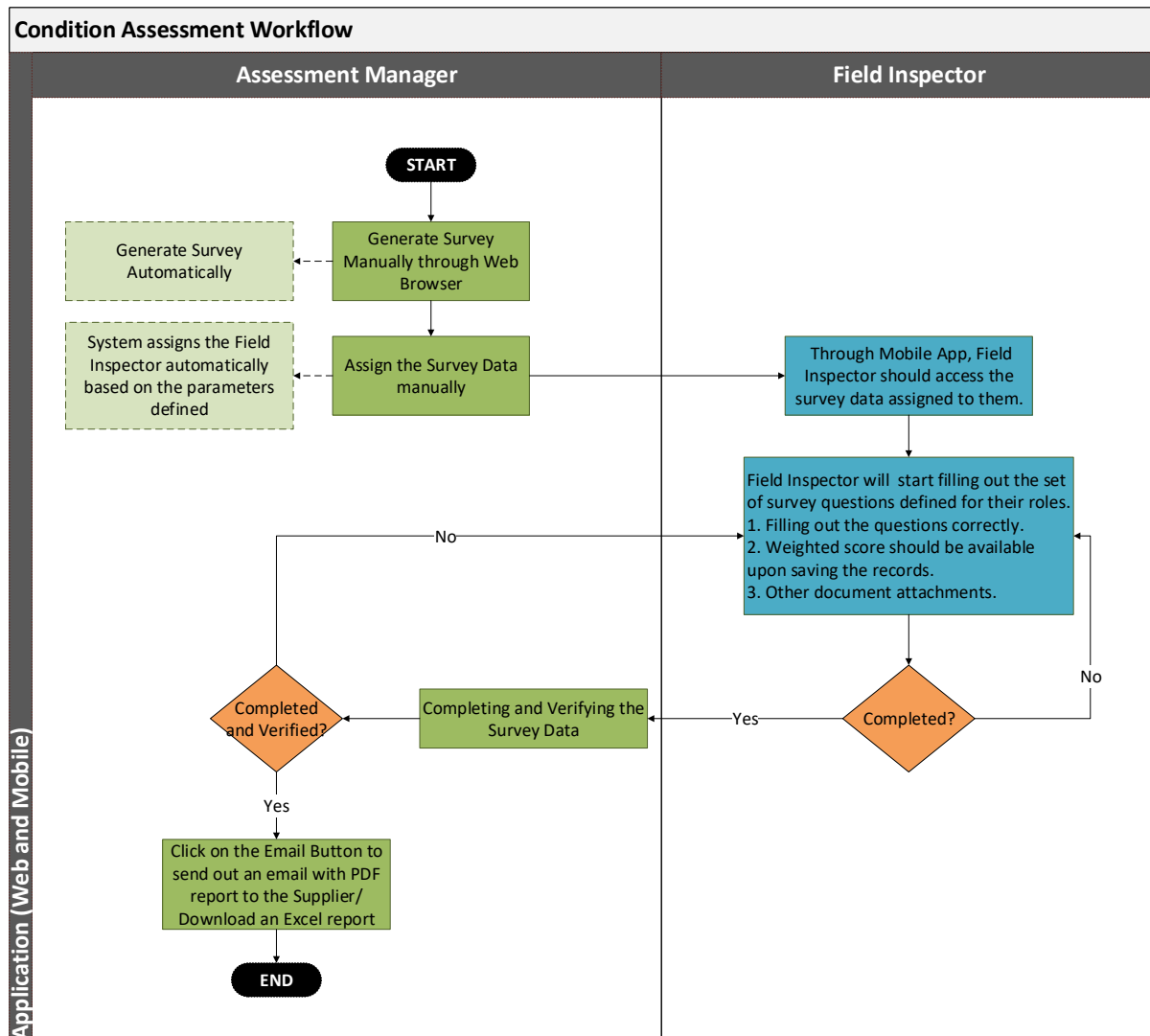
The diagram below describes the steps involved in Survey Management.





3.2 Survey Management Workflow

The workflow below describes how the system should best fit the current procedure of the company.





3.3 Setup

From this view, you can view the list of surveys defined, user can develop and maintain survey data required for working with the Survey Management. This includes defining such below:

3.3.1 Requirements: Define Survey

1. The following fields should be mandatory:
 - Survey Code – Free Form
 - Survey Title – Free Form
 - Description – Free Form
 - Service Type – Ellipsis Button/ Dropdown List
 - Division – Ellipsis Button/ Dropdown List
 - Low Score – Free Form
 - High Score – Free Form
2. Description – user can enter additional information about the survey.
3. Service Type – field's type should be dropdown list (list of values) where the user can select one option from the list.
4. Division Code – field's type should be dropdown list (list of values) where the user can select one option from the list.

NOTE:

There should be a page where the user can define those fields above-mentioned.

3.3.2 Requirements: Define Questions within a Survey

1. Fields could be in a form of – free from, dropdown list, date etc.
2. Important fields to be included within a Survey:
 - Question Weight – field should be in percentage format that accept values ranges from (0-100). Data type should be decimal and accept two digits.
 - Remarks – this field should be available for each question and Field Inspector should access this in Web App. In addition, this field should appear in the generated PDF report format. The generated report will be sent as an email attachment to the Vendor.

NOTE:

When adding/editing/deleting questions, the system should always be validating and show error message that total weight of all questions ***within the selected survey*** exceeds 100.

- Attachment, for each answer user should be allowed to attach photo for evidence or clarification.



4. Process

4.1 Requirements: Generate Survey Data or Auto-Scheduling

From this view, user should have the option to generate the survey for both Sites and Projects.

Assessment Manager will generate survey and then assigns the generated survey to a specific field inspector.

4.1.1 Generate Survey Manually:

1. The following fields should be available on the Generate Survey Data form when generating the Survey:
 - Site Code – Ellipsis Button/ Dropdown List
 - Building Code – Ellipsis Button/ Dropdown List
 - Floor Code – Ellipsis Button/ Dropdown List
 - Room Code – Ellipsis Button/ Dropdown List
 - Equipment Standard – Ellipsis Button/ Dropdown List
 - Equipment Code – Ellipsis Button/ Dropdown List
 - Project Code – Ellipsis Button/ Dropdown List
 - Vendor Code – Ellipsis Button/ Dropdown List
2. Site Code, Building Code, Floor Code, Equipment Standard and Equipment Code – field's type should be drop down list (list of values) where the user can select one option from the list. Site Code should be mandatory.
3. Generate Survey Data – user should have the option to select what to generate (Equipment, Rooms or Rooms and Equipment)
4. Project Code – when generating survey data, the Project Code needs to be selected as optional. Therefore, the user has the option to generate survey for a specific project.
5. Vendor Code – should be auto-populated after generating the survey.

4.1.2 Generate Survey through Auto-Scheduling:

1. Should have the option to setup the auto-scheduling to run at certain intervals/ parameters defined by the user.
2. Once survey successfully generated, data should automatically have assigned to a Field Inspector. The Field Inspector then goes to the field

NOTE:

1. There should be views where the user can define those fields above-mentioned.
2. In addition to the generated survey data, field inspector should always have the option of creating new records while in the field.

and inspects the particular items.



4.2 Requirements: Manage Survey Data

From this view, user will access the particular items and enters their observations through Web App.

1. Fields should be available on the Edit Survey Form:
 - Project Code – Auto populated and disabled for editing
 - Site Code – Ellipsis Button/Dropdown List
 - Building Code – Ellipsis Button/Dropdown List
 - Floor Code – Ellipsis Button/Dropdown List
 - Room Code – Ellipsis Button/Dropdown List
 - Inspect By – Ellipsis Button/Dropdown List
 - Date Assessed – Date
 - Date to Perform – Date
 - Equipment Code – Ellipsis Button/Dropdown List
 - Document Field – Document Upload
 - Status – Ellipsis Button/Dropdown List
 - Description – Free Form
 - Questions – Defined in the survey level.
 - Email Button – Send email included the 5 attachment
 - Excel Button – Export report
2. Project Code – auto populated based on the project selected upon generating the survey data.
3. Site Code – auto populated based on the restriction specified by the user upon generating the survey.
4. Inspect By – auto populated and enable for editing.
5. Date Assessed – allow the user to edit or enter the data.
6. Date to Perform – auto populated upon generating the survey and enable for editing.
7. Equipment Code – auto populated and enable for editing.
8. Vendor Code – allow the user to select the appropriate vendor code.
9. Description – allow the user to edit or enter the data.
10. Division Code – auto populated and enable for editing.
11. Document Field – allow the user to upload multiple documents (minimum of 5 fields for attachment).
12. Status – user should not allow changing the status to Completed and Verified unless all survey questions are answered. In addition, once the item status changed to Completed and Verified, user should be blocked from editing in both Web App.



13. Email Button – button should be added to the edit survey form. Once the user clicks the button, the system will open the Outlook with attachments of PDF report format and other documents attached in the Document Fields.
14. Excel Button – the user should have the option to download an excel report from the same view.
15. Filter – available fields to filter (Date Assessed, Project Code, Service Type and Division Code, Site Code, Building Code, Inspect By and Status)

NOTE:

1. While the user entering the score, the system should show the weighted score along with the Question Weight.
2. Upon saving the survey data, the system should save the value of weighted score (Score x weight per question) for each question. The weighted score should be saved in the system and can be used later on for reporting purposes.

5. Special Reporting

5.1 Users Report

1. The system should allow the users to download Excel report in a vertical format.

5.2 Accumulative Users Report

1. Based on the criteria entered by the user when filling out the survey, the system should have the option to download an accumulative excel report.

Date to Perform 14/Arp/2017				Date to Perform 28/Arp/2017				Date to Perform 14/May/2017			
Action Item ID	Score	Weight	Weighted Score	Action Item ID	Score	Weight	Weighted Score	Action Item ID	Score	Weight	Weighted Score
99292	3	8%	0.24	91535	1	8%	0.08	n	2	8%	0.16
99292	2	2%	0.04	91535	3	2%	0.06	n	2	2%	0.04
99292	1	1%	0.01	91535	2	1%	0.02	n	2	1%	0.02
99292	3	3%	0.09	91535	2	3%	0.06	n	2	3%	0.06
99292	2	3%	0.06	91535	2	3%	0.06	n	1	3%	0.03
99292	3	8%	0.24	91535	2	8%	0.16	n	1	8%	0.08
99292	3	5%	0.15	91535	2	5%	0.1	n	1	5%	0.05
99292	2	7%	0.14	91535	2	7%	0.14	n	1	7%	0.07
99292	3	7%	0.21	91535	2	7%	0.14	n	1	7%	0.07
99292	3	3%	0.09	91535	2	3%	0.06	n	1	3%	0.03
99292	3	2%	0.06	91535	3	2%	0.06	n	1	2%	0.02
99292	3	5%	0.15	91535	3	5%	0.15	n	4	5%	0.2
99292	1	5%	0.05	91535	3	5%	0.15	n	4	5%	0.2
99292	2	4%	0.08	91535	3	4%	0.12	n	4	4%	0.16
99292	1	4%	0.04	91535	3	4%	0.12	n	4	4%	0.16
99292	3	2%	0.06	91535	3	2%	0.06	n	4	2%	0.08
99292	3	3%	0.09	91535	3	3%	0.09	n	4	3%	0.12
99292	2	4%	0.08	91535	3	4%	0.12	n	3	4%	0.12
99292	3	1%	0.03	91535	3	1%	0.03	n	3	1%	0.03
99292	2	3%	0.06	91535	4	3%	0.12	n	3	3%	0.09
99292	1	9%	0.09	91535	4	9%	0.36	n	3	9%	0.27
99292	4	6%	0.24	91535	4	6%	0.24	n	3	6%	0.18
99292	1	5%	0.05	91535	4	5%	0.2	n	3	5%	0.15
			2.35				2.7				2.39



5.3 Dashboard

- The system will show the following reports in the dashboard based on the following:
 - Survey Code
 - Property
 - Vendor
 - Survey Service Type
 - Project Code
- There will be two types of report:
 - Chart Type – Property/ Site, Supplier and Service Type.

4 REPORTING PER PROPERTY								
Q Code	Landscaping BW							
Date to Perform From	1	TO	N					
Status	Completed							
*Site Code	12456001	Project Code	2016-00006					
CHART TYPE		Weighted Scores						
Question	Weight	Date to Perform	Date to Perform	Date to Perform	Date to Perform	Date to Perform	Avg	
		Action Item ID 1	Action Item ID 2	Action Item ID 3	Action Item ID 4	Action Item ID N		
Q1								
Q2								
..								
..								
Qn								
Total		A1	A2	A3	..	An	Aavg	
Low Score	1.7							
High Score	2.8							



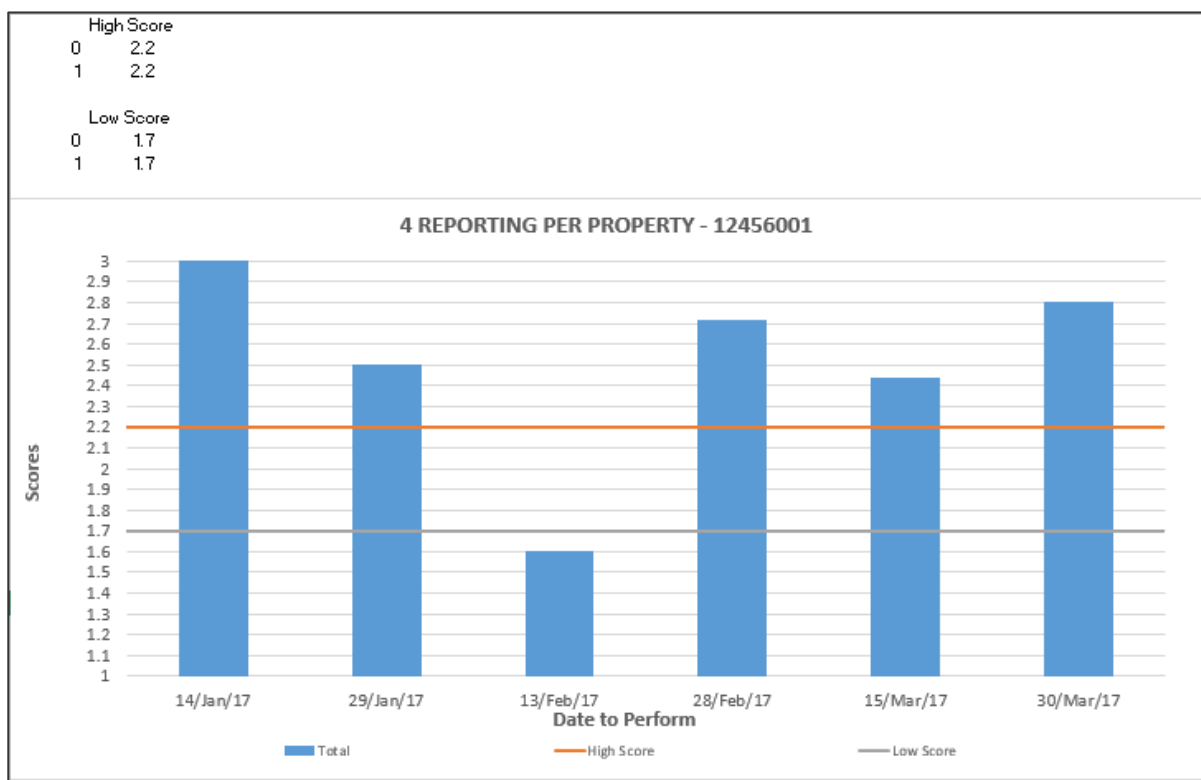
4 REPORTING PER SUPPLIER						
Q Code	Landscaping B/W					
Date to Perform From	1	TO	N			
Status	Completed					
Supplier *	Dessert group	Project Code	2016-00006			
CHART TYPE			Weighted Scores			
Action Item ID	Date to Perform	Property 1	Property 2	Property 3	..	Property N
3456		Total Weighted Score				
3457		Total Weighted Score				
..		Total Weighted Score				
...		Total Weighted Score				
...		Total Weighted Score				
Property Average		Avg(Property 1)				Avg(Property N)
Low Score	1.7					
High Score	2.8					
Once Click on Action item ID , system will show inspection results by questions						
Action Item No:	3456					
Q Code	Landscape B/W					
Date to Perform	yyyy-mm-dd					
Status	Completed					
Supplier *	Dessert group					
Property						
CHART TYPE			Weighted Scores			
Question	Weight	Score	Weighted Score	Remarks		
Q1	15.00%	3	0.45			
Q2	10.00%	2	0.2			
Q3	20.00%	1	0.2			
Q4	25.00%	3	0.75			
Q5	30.00%	1	0.3			
Total	100.00%		1.9			
Low Score	1.7					
High Score	2.8					

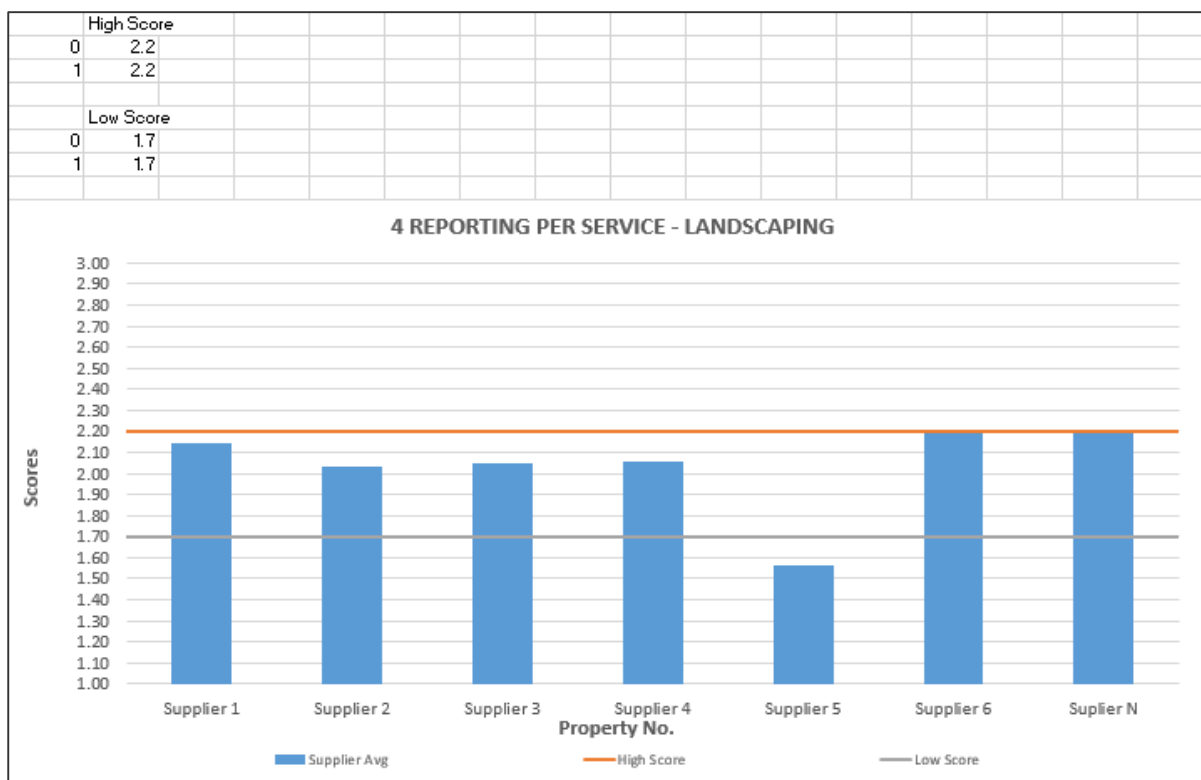
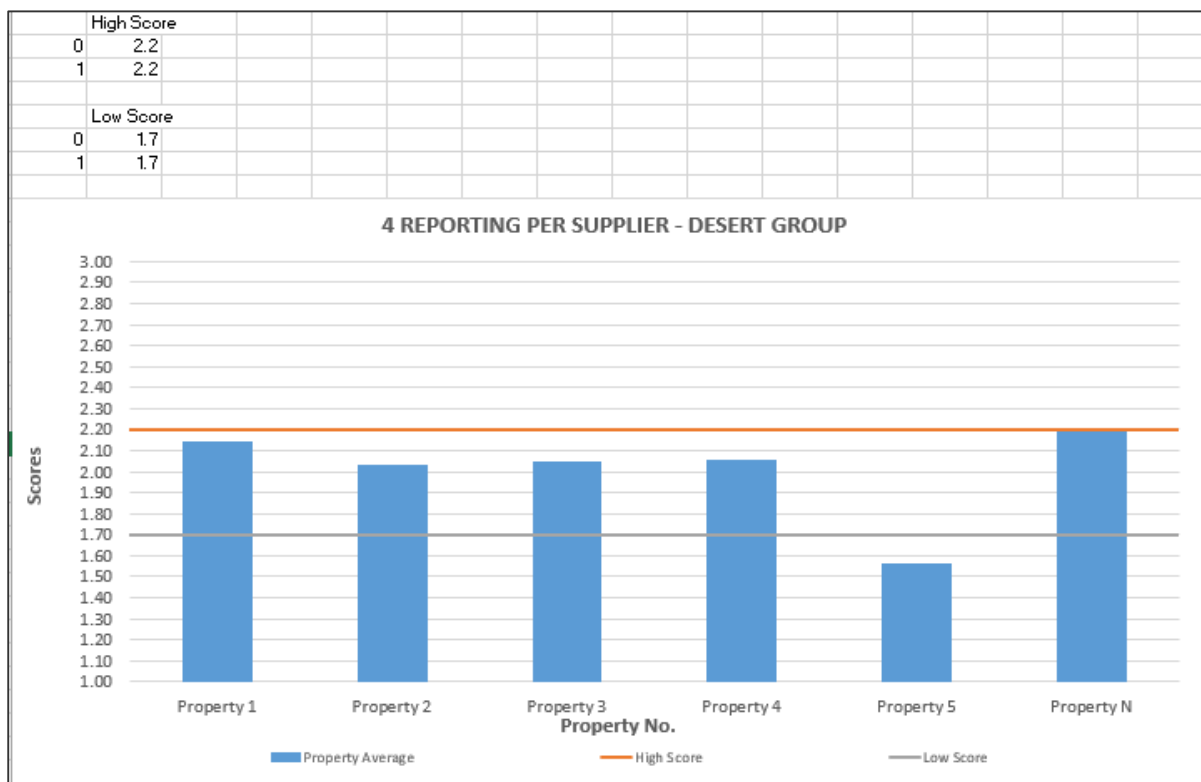
4 REPORTING PER SERVICE						
Q Code	Landscaping B/W					
Date to Perform	1	TO	N			
Status	Completed					
*Service:	Lanscaping	Project Code	2016-00006			
CHART TYPE			Weighted Scores			
Site Code	Supplier 1	Supplier 2	Supplier 3	Supplier N
1241101		total avg of Weighted Avg Of Site				
.....						
..						
...						
....						
Supplier Avg	Avg(Supplier 1)					Avg(Supplier N)
Low Score	1.7					
High Score	2.8					
Once Click on Property Code, system will show inspection results by questions						
Property Number	1241101					
Q Code	Landscape B/W					
Date to Perform	yyyy-mm-dd					
Status	Completed					
Service:	Lanscaping					
Action Item ID	3456					
CHART TYPE			Weighted Scores			
Question	Weight	Score	Weighted Score	Remarks		
Q1	15.00%	3	0.45			
Q2	10.00%	2	0.2			
Q3	20.00%	1	0.2			
Q4	25.00%	3	0.75			
Q5	30.00%	1	0.3			
Total	100.00%		1.9			
Low Score	1.7					
High Score	2.8					

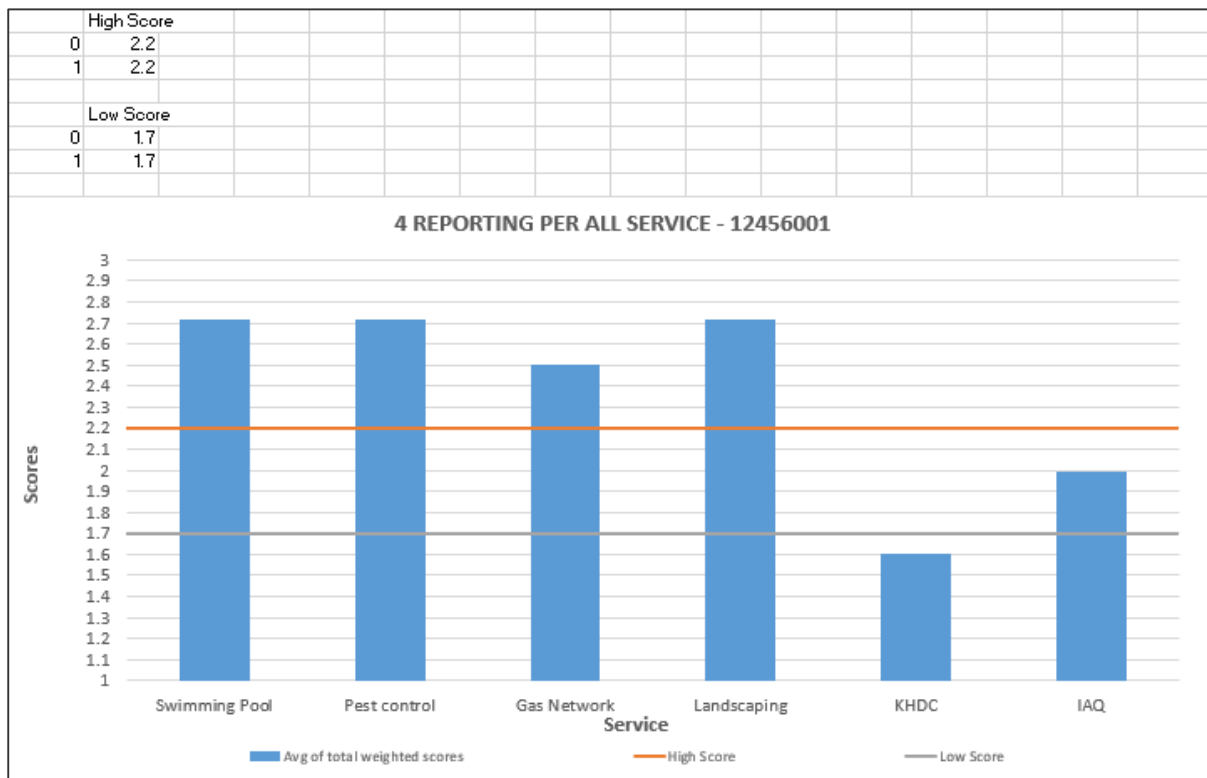


4 REPORTING PER SERVICE					
Q Code	Landscaping B/W				
Date from	1	TO	N	Project Code	2016-00006
Status	Completed				
Service:	All		*Site code:	1245600	
CHART TYPE	Weighted Scores				
	Swimming Pool	Pest control	Gas Network	Landscaping	IAQ
	Avg of total weighted scores				
Low Score	1.7				
High Score	2.8				

- Graph Type – Property/ Site, Supplier and Service Type







6. None-Functional Requirement

The following requirement need to be met for the solution:

1. Solution is to be implemented on ASP.NET MVC 5 or later.
2. GUI is HTML5 and AngularJS
3. User will be authenticated through LDAP, and assigned a role for transaction.
4. Admin Portals UX options should be presented initially along with clarification stage and customized according to our branding guidelines.