

SOFTWARE REQUIREMENTS SPECIFICATION DOCUMENT

For ISAS Web Portal

PRESENTED BY

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Software Requirements Specification

for

ISASWebPortal

Version 1.0 approved

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ISAS Consultants

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Revision History

Name	Date	Reason For Changes	Version
N/A	N/A	N/A	N/A

1. Introduction

1.1 Purpose

This SRS document describes the functional and nonfunctional requirements for the ISASWebPortal(IWP). This document is intended to be used by the members of the project team who will implement and verify the correct functioning of the system.

1.2 Document Conventions

No special typographical conventions are used in this SRS.

1.3 Product Scope

The IWP will automate lead management and case processing for ISAS Consultants by moving the process online. Additional information can be found in the Product vision document, as well as in the latter sections of the SRS.

1.4 References

1. ISASWebPortal/Product vision document, [ISASWebPortal-Product Vision Document](#)

2. Overall Description

2.1 Product Perspective

The ISASWebPortal (IWP) is a new software system designed to automate the manual processes of handling leads and processing cases at ISAS Consultants, which provides services related to immigration and study abroad, among others. As illustrated in Figure 1, the context diagram depicts the external and internal aspects of the proposed system, which is expected to evolve over multiple releases or iterations.

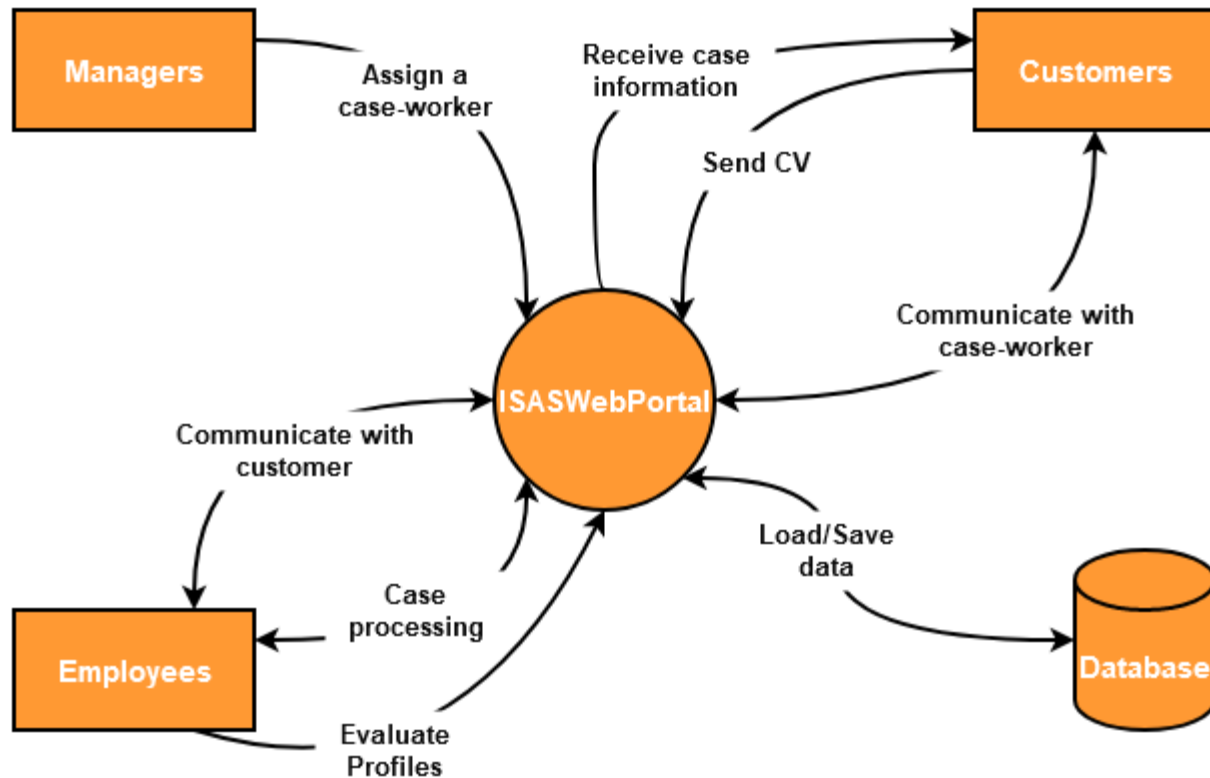


Figure 1: Context Diagram

2.2 User Classes and Characteristics

User Class	Description
Customers	The customer is an individual who is interested in either skilled immigration or studying abroad. They will use the software to submit their details and CV, check the status of their case and communicate with ISAS consultants. They may have limited knowledge of the immigration process and will need clear instructions on how to use the software.
Employees	The employee/case worker is an individual who is responsible for handling the day-to-day work of the immigration cases. They will use the software to collect necessary documents from the customers, check the status of cases, communicate

	with customers and managers and do an initial assessment of the leads/profiles to check if they fulfill the criteria for either skilled immigration or studying abroad. They will have a good understanding of the immigration process, criteria and the company's policies and procedures.
Managers	The manager is an individual who is responsible for overseeing the work of the employees and ensuring that all cases are handled in a timely and efficient manner. They will use the software to assign cases to employees, monitor the progress of cases, and communicate with customers. They will have a good understanding of the immigration process and the company's policies and procedures.

2.3 Operating Environment

OE-1: The IWP shall operate correctly with the latest and most recent used versions of the following web browsers: Firefox ; Google Chrome; and Apple Safari

OE-2: The IWP shall operate on a server running the current corporate-approved versions of Red Hat Linux and Apache HTTP Server.

2.4 Assumptions and Dependencies

Assumptions:

- It is assumed that the software will be accessed by the users via a web browser.
- It is assumed that the software will be able to integrate with the company's existing systems, such as email and CRM.
- It is assumed that the users have a basic understanding of how to use web-based applications and can navigate through the software's interface.

Dependencies:

- The software has a dependency on the availability of a stable internet connection for users to access it.
- The software has a dependency on the availability of the necessary hardware resources, such as servers and storage, to run the software.

- The software has a dependency on the compliance with the immigration laws, policies, and regulations of the countries that the company specializes in (such as Australia, Canada and New Zealand) and any changes to these laws, policies or regulations may affect the requirements of the software.
- The software may depend on third-party or commercial components, such as a document management system, that will need to be integrated with the software.

3. System Features

3.1 Lead Assessments:

3.1.1 Capture leads:

The software should provide a system for capturing leads, including capturing client details such as name, contact information, and case type (skilled immigration or study abroad) through email.

3.1.2 View and Manage/sort leads:

The software should provide a system for viewing and managing leads in a centralized system, including filtering and searching for leads based on various criteria such as lead status, lead type, and lead source.

3.1.3 Update lead status:

The software should provide a system for updating the status of leads, such as marking a lead as qualified or disqualified, and store the lead's history.

3.1.4 Track lead progress:

The software should provide a system for tracking the progress of leads, including the status of the lead, the documents required, and the tasks that need to be completed.

3.1.5 Generate lead reports:

The software should provide a system for generating reports on leads, such as number of leads captured, leads converted to clients, and leads by source.

3.2 Case Management:

3.2.1 Create Case:

The software should provide a system for creating cases for skilled immigration or study abroad. The system should allow users to initiate a case by providing the client's details, such as their name, contact information, and case type (skilled immigration or study abroad). Users should also be able to add additional information, such as the documents required, tasks that need to be completed, and the status of the case.

3.2.2 Assign Case:

The software should provide a system for assigning cases to relevant employees or departments. The system should allow users to assign cases based on case type, such as skilled immigration or study abroad, or by department, such as immigration or study abroad. The system should also allow users to reassign cases if necessary, and track the progress of the case.

3.2.3 Track Case Progress:

The software should provide a system for tracking the progress of cases, including the status of the case, the documents required, and the tasks that need to be completed. The system should also allow users to update the status of the case, such as marking a case as completed or pending.

3.2.4 View/Manage Cases:

The software should provide a system for viewing and managing cases in a centralized system, including filtering and searching for cases based on various criteria such as case type, case status, and client details. Users should also be able to view and update case details such as the client's information and case progress.

3.2.5 Generate Case Reports:

The software should provide a system for generating reports on cases, such as number of cases registered, cases completed, and cases by type. The system should also allow users to customize reports, such as filtering and sorting data based on specific criteria.

3.2.6 Alerts And Notifications:

The software should provide a system for generating alerts and notifications for various events such as case deadlines, new leads, and case updates. Users should also be able to configure the types of alerts and notifications they want to receive, such as email or SMS notifications.

3.3 Communications:

3.3.1 Communication History:

The software should provide a system for storing and viewing the communication history with a client. The system should allow users to view all communication with a client, including emails, phone calls, and meetings, and filter and search communication by date, type, and subject.

3.3.2 Communication History:

The software should provide a system for sending automated communication to clients, such as automated emails and SMS messages. The system should allow users to create and manage templates for automated communication and schedule when the communication should be sent.

3.3.3 Reminders:

The software should provide a system for setting and managing reminders for various events such as case deadlines, new leads, and case updates. Users should also be able to configure the types of reminders they want to receive, such as email or SMS reminders.

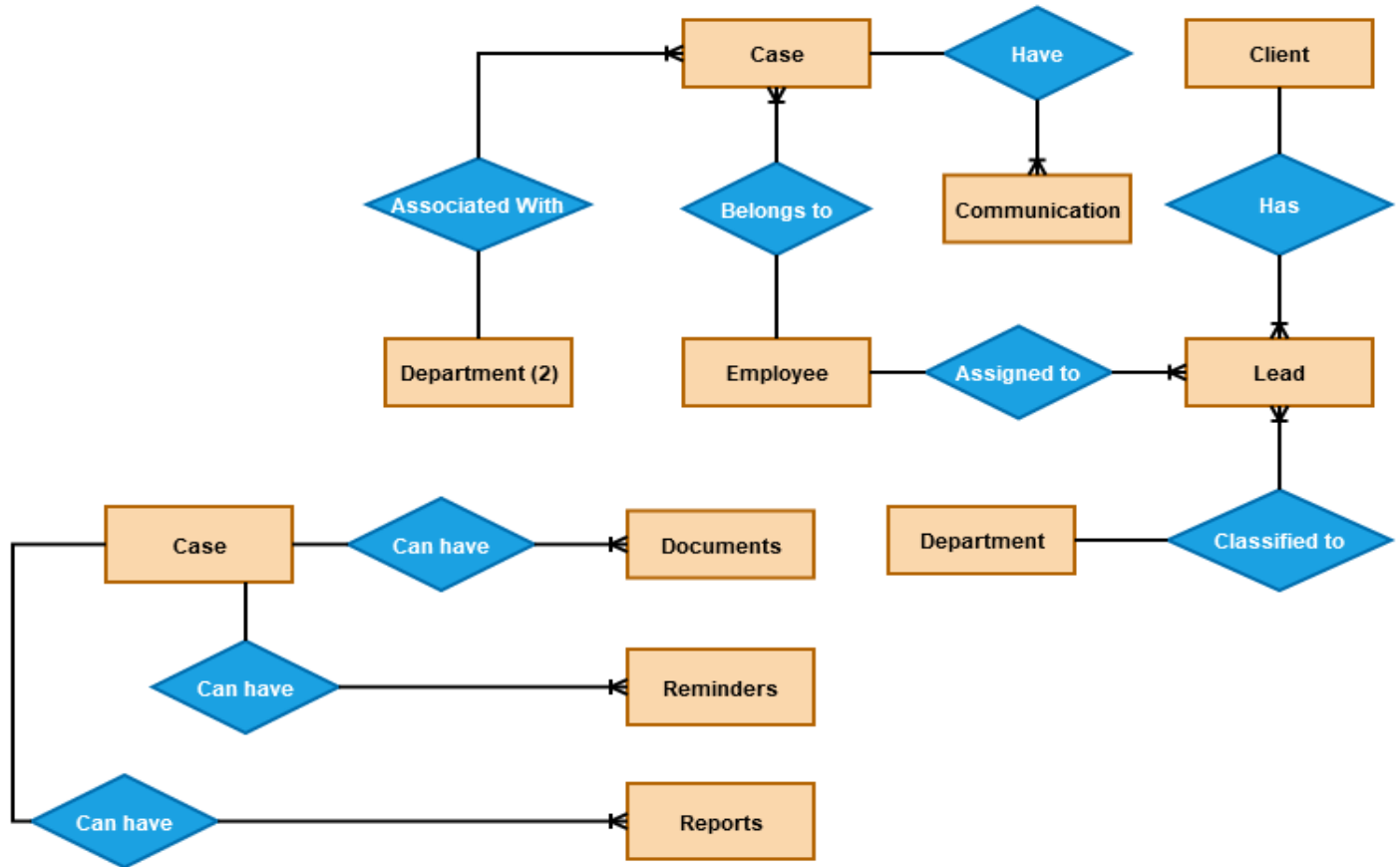
3.4 Dashboard:

3.4.1 General Dashboard:

The software should provide a general dashboard that allows users to view the overall progress of their work and the work of the company. The dashboard should display information such as the number of leads received, the number of cases registered, the number of cases completed and the number of cases by type. The dashboard should also allow users to filter and sort data based on specific criteria.

4. Data Requirements:

4.1 Logical Data Model:



4.2 Data Dictionary:

Data Element	Description
Client ID	A unique identifier for a client, it is a way to identify the client in the system.
First Name	The client's first name, it is used to address the client.
Last Name	The client's last name, it is used to address the client.
Email	The client's email address, it is used to

	contact the client.
Phone Number	The client's phone number, it is used to contact the client.
Lead ID	A unique identifier for a lead, it is a way to identify the lead in the system.
Lead Type	The type of lead, such as skilled immigration or study abroad, it helps in identifying the case.
Lead Source	The source of the lead, such as email or in-person meeting, it helps in identifying the lead.
Lead Status	The current status of the lead, such as new, qualified, or disqualified, it helps in identifying the lead.
Case ID	A unique identifier for a case, it is a way to identify the case in the system.
Case Type	The type of case, such as skilled immigration or study abroad, it helps in identifying the case.
Case Status	The current status of the case, such as new, in progress, or closed, it helps in identifying the case.
Communication ID	A unique identifier for a communication, it is a way to identify the communication in the system.
Communication Type	The type of communication, such as email or phone call, it helps in identifying the communication.
Communication Note	A note or summary of the communication, it is used to keep a record of the communication.
Reminder ID	A unique identifier for a reminder, it is a way to identify the reminder in the system.
Reminder Type	The type of reminder, such as follow-up call or document submission, it helps in

	identifying the reminder.
Reminder Date	The date the reminder is set for, it is used to set the date for the reminder.
Report ID	A unique identifier for a report, it is a way to identify the report in the system.
Report Type	The type of report, such as lead or case, it helps in identifying the report.
Report Date	The date the report was generated, it is used to set the date for the report.

5. External Interface Requirements

5.1 User Interfaces

UI-1: The system shall provide a help link from each displayed web page to explain how to use that page

5.2 Hardware Interfaces

No hardware interfaces have been identified.

5.3 Software Quality Attributes

Usability Requirements:

- **Easy navigation:** The software should be easy to navigate and understand, with clear labels and icons that users can easily understand.
- **Intuitive user interface:** The software should be designed with an intuitive user interface that makes it easy for users to find the information and features they need.
- **Responsive design:** The software should be designed with a responsive layout, so that it can be used on a variety of devices, including desktops, laptops, tablets, and smartphones.
- **Error prevention and handling:** The software should be designed to prevent errors as much as possible and provide clear, concise error messages when errors do occur.

Performance Requirements:

- **Speed:** The software should be fast and responsive, with minimal load times and delays.
- **Scalability:** The software should be able to handle a large number of users and cases without compromising performance.
- **Security:** The software should be designed with security in mind, protecting sensitive data and user information from unauthorized access.
- **Backup and recovery:** The software should include robust backup and recovery mechanisms to protect against data loss in the event of a system failure or other issue.
- **Compliance:** The software should be designed to comply with relevant laws, regulations, and industry standards, such as data privacy laws.
- **Error reporting:** The software should have the ability to log and report errors, so that issues can be identified and resolved quickly.
- **Data integrity:** The software should ensure the integrity and accuracy of data, by implementing validation rules and providing a way to audit the data.
- **Interoperability:** The software should be designed to be compatible with other systems and software, to facilitate data exchange and integration with other tools.

Security Requirements:

- **Authentication:** The software should have a secure authentication mechanism to ensure that only authorized users can access the system.
- **Authorization:** The software should have a robust authorization mechanism to control access to data and functionality based on user roles and permissions.
- **Data encryption:** The software should encrypt sensitive data, both at rest and in transit, to protect it from unauthorized access or disclosure.
- **Access control:** The software should have fine-grained access control mechanisms to prevent unauthorized access to data and functionality.
- **Auditing:** The software should have an auditing mechanism to log system activity, including user logins, data access, and changes made to data.
- **Incident management:** The software should have a process in place to detect, respond to, and recover from security incidents, such as data breaches.
- **Vulnerability management:** The software should have a process in place to identify and mitigate security vulnerabilities, such as regular security testing and software updates.

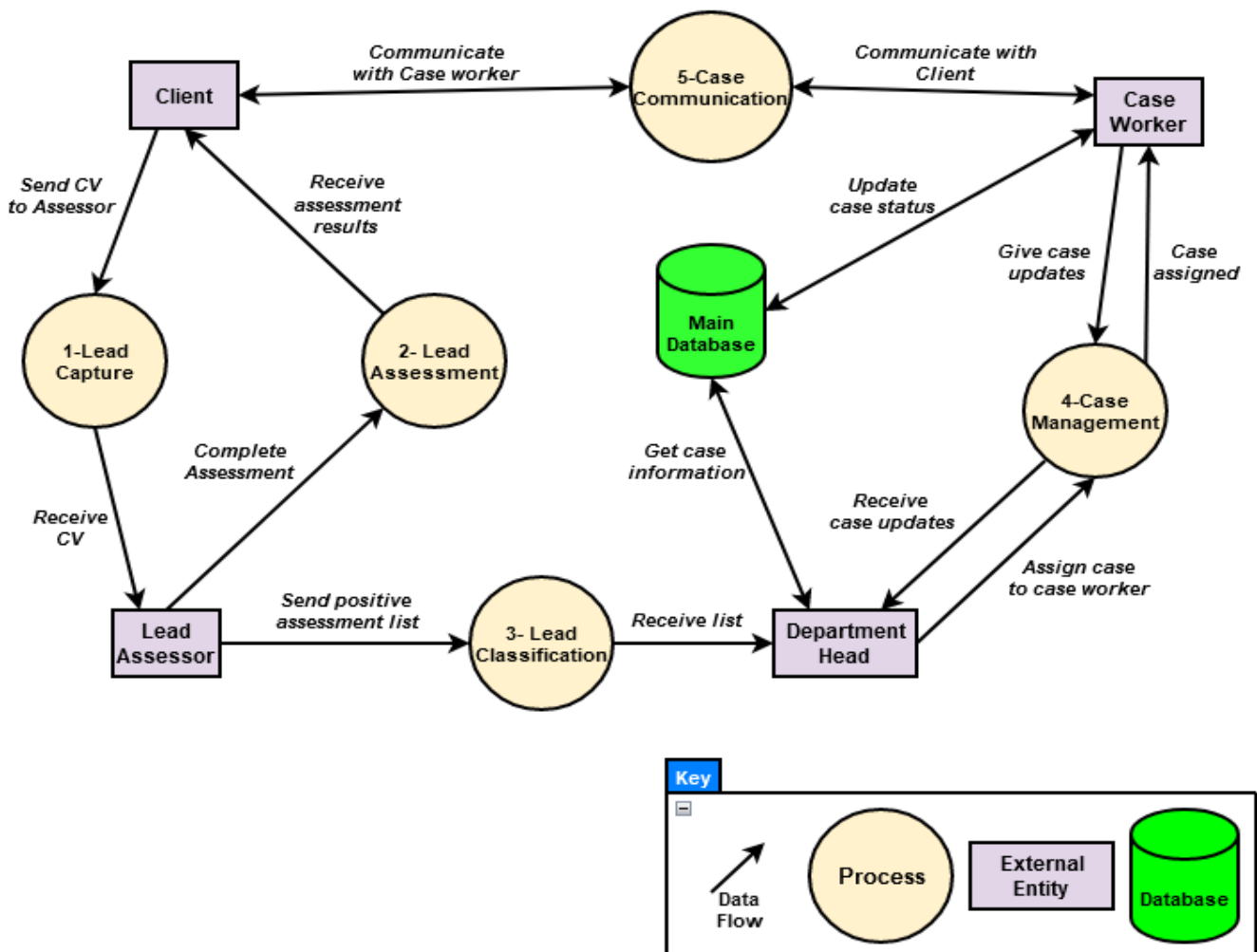
5.4 Business Rules

Rule Definition	Type of Rule	Static or Dynamic
Lead assessment criteria	Fact	static
Maximum number of leads that can be assigned to one case worker	Constraint	dynamic
Lead status can only be updated by authorized users	Constraint	static
A case worker can only be assigned to a case if they have the necessary skills and qualifications	Constraint	static
A case can only be closed if all required documentation has been received and processed	Constraint	dynamic
A lead can only be classified as a student visa if they have provided proof of enrollment in an educational institution	Constraint	dynamic
A lead can only be classified as a skilled immigration if they have provided proof of relevant work experience and qualifications	Constraint	dynamic
A lead can only be classified as a business immigration if they have provided proof of ownership or management of a business	Constraint	dynamic
A lead can only be classified as a visit/tourism if they have provided proof of travel itinerary and accommodation booking	Constraint	dynamic
Automatic reminders are sent to clients every 2 weeks if their case has not been	Fact	dynamic

updated for more than 2 weeks		
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Appendix A: Analysis Models

Data Flow Diagram:



Swimlane Diagram: