**Project Initiation Document**

**Project: VBooks**

**Project Id: VT0001**

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# Contents

[1. Introduction](#h.8bm41qdevvy4)

[2. Project Objectives](#h.vpexjgfgl1b3)

[2.1 Goals and Objectives](#h.ddvg22imezaz)

[2.2 Critical Success Factors](#h.xuxyin6nwkl7)

[3. Scope](#h.jf8uroxc75n0)

[3.1 Organisational Scope](#h.ms850288xk7x)

[3.2 Logical Scope](#h.cm6n1nn8gkbc)

[3.3 Temporal Scope/Phasing](#h.2j7e64qmxaxq)

[3.4 Out of Scope](#h.7zlh62jfmdwk)

[4. Risks, Constraints and Assumptions](#h.w5koie3n0cg)

[4.1](#h.pfey7w53rd3d) [Risks](#h.jxc4n84mi5as)

[4.2](#h.jxc4n84mi5as) [Risk Management Approach](#h.pfey7w53rd3d)

[4.3 Constraints](#h.oqmw52tguy59)

[4.4 Assumptions](#h.b35lbdhifpf9)

[5. Project Organisation](#h.8k6nrh572ym7)

[5.1 Project Structure](#h.wz008bf90112)

[5.2 Roles & Responsibilities](#h.7cq9taz9foop)

[6. Project Control](#h.hilm82vhzkgq)

[6.1 Issue Control](#h.34x1lwx0z4s)

[6.2 Change Control](#h.pzrd3kgqr5y7)

[6.3 Quality Assurance](#h.ovs7no9s3jy7)

[6.4 Information Management](#h.lf57awhrgay3)

[7. Reporting](#h.bh95yl9tzgrm)

[7.1 Reporting within the Project Team](#h.wipdpizif8y2)

[7.2 Management Reporting](#h.47wm5q5ry6iu)

[8. Stakeholders](#h.exxcmwgtc2t7)

[8.1 Identification and Analysis](#h.te55ckg3k6ol)

[8.2 Communication](#h.bpn7b2fllmcj)

[9. Planning](#h.xdxwzrcjlgvx)

[9.1 Approach](#h.91u2zebvxlj0)

[9.2 Milestone Plan](#h.cht87w7pax8s)

# 1. Introduction

Victoria Distilleries is a group of manufacturing company of Wines, Whisky, beer, etc. In multiple locations/countries of South Africa. Currently Victoria Distilleries is handling the Sales management system manually. VBooks project is proposed to automate all the Sales management system.

The Major module in the Project is My Sales Module, the project has other modules like customers, employees, products, alert notifications, etc.

Upon the successful delivery of the project in multiple countries, further extension of the project like Inventory module, etc. Can be expected from the Client.

# 2. Project Objectives

## 2.1 Goals and Objectives

|  |  |
| --- | --- |
| Goals | Objectives |
| *The proposed automated system will remove the lot of overhead of entering and maintaining sales & accounting system manually completely.* | * *It will be a tool to help sales executives and management do the job they are paid for, not an added source of frustration* * *It will ease the administrative burden by allowing users to work efficiently and effectively thus freeing time for those activities which add greater value* * *Both management and sales executives will have readily accessible the day-to-day information they need to do their job* * *It will provide greater transparency for decision makers at all levels* |

## 2.2 Critical Success Factors

* No need of maintaining the sales management information in papers/ reciepts once fully automated.
* Automated workflow management of approvals/reject for sale return products, journals, etc.
* Fast processing of sales request like new quantity, allotment, sale return, journal, etc.
* Immediate notifications of all kinds of transactions to corresponding users (managers, sales executives).
* Information security by enforcing restred access to the employees of the organisation based on thier role.
* Various kind of Reports for analyzing Sales, expenses by sales executives, region, customer , etc.
* Support of correcting the manual entry mistakes most of the transactions.

# 3. Scope

## 3.1 Organisational Scope

* All the major artifacts/documents provided by the Client, including project requirement details, sample /real client time data, etc will be secured by putting the data to svn repository and giving restricted access to the required team members.
* Secured/ Restricted access for the client spefic document /information/ file, not allowed to transfer to outside of the organisation network.

## 3.2 Logical Scope

***Vbooks Sales Management system.***

* *Products*
* *Customers*
* *Employees*
* *Delivery Note*
* *Sales Return*
* *Journal*
* *Daybook*
* *System Lookups*
* *Alerts*
* *Dashboard*

## 3.3 Temporal Scope/Phasing

|  |  |
| --- | --- |
| Phase: | *Phase I* |
| Scope: | Development of Desktop/Web Application, QA |
| Dates/Duration: | 3 Months |
| Deliverables: | Products, Employees, Customers, System Lookups |

|  |  |
| --- | --- |
| 1. Phase: | 1. *Phase II* |
| 1. Scope: | 1. Development of Desktop/Web Application, QA |
| 1. Dates/Duration: | 1. 4 Months |
| 1. Deliverables: | 1. Delivery Note, Sale Return, Journals, Daybook |

|  |  |
| --- | --- |
| 1. Phase: | 1. *Phase III* |
| 1. Scope: | 1. Development of Android Version, QA |
| 1. Dates/Duration: | 1. 3 Months |
| 1. Deliverables: | 1. Delivery Note, Sale Return, Journals, Daybook |

|  |  |
| --- | --- |
| 1. Phase: | 1. *QA/UAT* |
| 1. Scope: | 1. Desktop/Web Application, Android Version |
| 1. Dates/Duration: | 1. 1.5 Months |
| 1. Deliverables: | 1. Tested version of Desktop/Web Application, Android Version |
| 1. Users/Locations: | 1. Ghana, West Africa |

## 3.4 Out of Scope

* Inventory Management is not in the scope of project at present.
* We would hope this might come as an extension of the project after delivery of project.

# 4. Risks, Constraints and Assumptions

# 4.1 Risks

* *Internet may not be available for whole day for Tablet user and Tablet User may not have the data in synch with the Central Application Data base.*
* *Some Sales Executives will not return to the factory daily or weekly.*

## 4.2 Risk Management Approach

* *Design & implmenet the appication in such a way that, it can manage to run the even if internet is not available and not all the data is in sync with the central data base.*
* *Design & Support for Non daily customers as well.*

## 4.3 Constraints

## 4.4 Assumptions

|  |
| --- |
| Project Assumption |
| Most of the end users of the application does not have knowledge of using PCs and Tablets |
| There is not much technical (software/hardware) knowledge with the end users. |
| Need to provide training on how to use PC/Tablets along with application to all users. |

# 5. Project Organisation

## 5.1 Project Structure

## 5.2 Roles & Responsibilities

|  |  |  |  |
| --- | --- | --- | --- |
| Project Role | Number of People | Days per Week | Total Days for the Project |
| Project Manager | 1 | 5 |  |
| Senior Developer | 3 | 5 |  |
| Junior Developer | 2 | 5 |  |
| Quality Analyst | 1 | 5 |  |
| DBA | 1 | 2 |  |

# Please Refer the document 'VB\_RAR\_v1.0.docx'.

# 6. Project Control

* Daily Status Meetings to track and guide/correct, if any deviations in the deliverables.
* Maintain the task tracker with daily wise updates based on status.

## 6.1 Issue Control

* Enter and maitain all the issues in Bug Tracking tool named 'Mantis' and the all the team members can update the status of the assigned tasks.

## 6.2 Change Control

* Log and maitain all the Change Request of requirements in an document and using version control system 'SVN'.

## 6.3 Quality Assurance

* Test Cases document will be prepared and maintained in svn or central file repository with restricted access.
* Test Cases review document will be maintained for every new addition of test cases.
* Quality Assurance Testing will be done for every new build/release and result of the QA testing confirmation/sign off will be sent to the Project Manager by mail.

## 6.4 Information Management

* All the project information and documents provided by the client will be placed in common central repository like svn and given restricted access to the project team members.
* Care will be taken not to tranfer the information assets outside of the organisation network.

# 7. Reporting

## 7.1 Reporting within the Project Team

* Project team members reports the daily status in the daily meeting and update the deliverables status daily and weekly basis through mails.

## 7.2 Management Reporting

* Project Manager sends updated report through mail/ weekly status meetings.

# 8. Stakeholders

## 8.1 Identification and Analysis

* Key Stakeholder Details and their view about the project.

|  |  |
| --- | --- |
| Sreekanth, Director – Victoria Distilleries. | VBooks will resolve lot of existing issues which are being faced with the existing manual system. |
| Hema Sekhar, Accounts head - Victoria Distilleries | VBooks will ease the sales, accounting, reporting and administration jobs. |

## 8.2 Communication

|  |  |  |  |
| --- | --- | --- | --- |
| Stakeholders | Expected Communications | Frequency | Media |
| *Project Steering Board* | *Status reporting*  *Issues reporting* | *In line with Project milestones*  *Dependent on timing and priority* | *Generally, formal reports to be followed up by face-to-face contact where appropriate* |
| *Project Team* | *Documentation and standards*  *Project knowledge*  *Internal communications* | *In line with plan*  *Ad hoc as necessary* | *Central repository, managed by project administration*  *Group e-mail*  *Team meetings* |

|  |  |  |  |
| --- | --- | --- | --- |
| Stakeholders | Expected Communications | Frequency | Media |
| *Admin User Representatives* | *Informal communication of progress*  *Discussion of issues*  *Respond to issues raised* | *In line with plan*  *Ad hoc on demand* | *Group e-mail, from project office*  *Formal reports plus informal communication with Project Team* |

# 9. Planning

## 9.1 Approach

* Creating a project management plan for project managment/ exectuion.
* Monitoring and updating the project management plan as per the progress of the tasks mentioned in the plan.

## 9.2 Milestone Plan

**PHASEI:**  VBooks Desktop/Web Version (Products, Employees, Customers, System Lookups Modules) - June,2013.

**PHASEII:** VBooks Desktop/Web Version (Delivery Note, Sale Return, Journals, Daybook Modules): October ,2013.

**PHASEIII:** VBooks Android Version (Delivery Note, Sale Return, Journals, Daybook): October ,2013.

**Revision History**

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| --- | --- | --- | --- |
| Date | Version | Description | Author |
| 2/18/2013 | VB-PID1.1 | Modifications done in the logic scope, roles and responsibilities of the project. | Sateesh T |
| 2/18/2013 | VB-PID1.0 | First Version of Project Initiation document. | Sateesh T |