Abstract

This document provides a detailed functional requirement for myAMI phase 2.

Requirement Specification Document

Version 0.1

**Requirement Specification Document**

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# **Introduction**

This document is intended to provides a detailed functional requirement for myAMI phase 2. Target audience is the development team.

# **Overview**

Apmitech needs to support Advanced Matrix in achieving its goal towards the digital transformation in order to improve efficiency and productivity. Apmitech Inc. will help create a catalog of digital templates of the forms for all the customers of AMI (Advanced Matrix Inc). These form templates will facilitate the company inspectors to capture field service data using their tablets or laptop. This solution will help AMI manage all the previously completed forms for safe keeping and provide easy access when needed.

Proposal is to develop a web application which will have a separate role-based login for both the Inspectors and the project managers. Project managers will be able to configure existing or new customer as per the plan specific to that customer according to the agreement between AMI and the customer. Project managers will be able to add plants, programs and forms under the customers and also view all the customers and corresponding plants, programs and forms in a tabular or tree view format for better visibility. PMs will be able to upload the form templates for different types inspections such as bi-weekly, quarterly etc. from their local computers in MS word or excel formats to the web application according to the defined plan for the customer. Inspectors will also have view only access to this tabular view.

As Project planning and scheduling is out of scope for this release, Project manager will manage the scheduling and planning outside this solution and can only assign an inspection work to an inspector based on the plan. Inspectors will be able to see the list of all the assigned but not completed work on the home page when they login. Apmitech will incorporate integrated project planning in future releases in a separate agreement.

This solution will give AMI the freedom to create forms in any structure and in a range of file formats (i.e. MS Word and Excel for this release). This web application will provide an easy remote access to each form template to both the inspectors and the project managers. Inspectors will not be required to use paper-based copies as they can download each form, fill them after inspection and upload them directly under the appropriate plant for the customer.

Project managers will have direct access to all the completed form filtered by date such as last 7 days, last 30 days etc. Project managers can review each completed report and mark them as complete before client delivery.

Inspectors will save each form to PDF before uploading it on the web app to maintain integrity of the content. Apmitech may automate the PDF conversion from Word or Excel format in future releases.

# **Customer Management**

* 1. Project managers shall be able to add a customer. A customer has few attributes such as name and address of HQ, contact email and phone.
  2. Inspectors are not allowed to have this functionality.

# **Plant Management**

* 1. Each customer can have multiple plants. Project managers shall be able to add one or more plants for a customer. A plant has few attributes such as Plant name, address.
  2. Inspectors are not allowed to have this functionality.

# **Program Management**

* 1. Each plant can have either Environmental or Health and safety program. Project managers shall be able to add one or more programs for a plant.
  2. Inspectors are not allowed to have this functionality.

# **Inspection Template Form Management**

* 1. Project managers shall be able to upload a form template for an inspection type say bi-weekly inspection. Inspectors are to download this template and fill work site data and upload them. PMs will prepare the templates outside this web application.
  2. Inspectors are not allowed to upload templates.

# **Tree view or Tabular view of All customers**

* 1. Inspectors and project managers shall be able to view all the customers, plants under each customer, programs under each plant, inspection types and corresponding form templates under each inspection type on a tabular or tree view. Prefer Give tree view over tabular view.
  2. Only Project manager shall have access to add plant, program, inspection type and corresponding template in word or excel file format.

# **Work Assignment**

* 1. A Project manager shall be able to assign an inspection work to any inspector. An assignment shall have reference to corresponding customer, plant, program (e.x. Health and Safety, environmental) and inspection type (e.x. bi-weekly, monthly, quarterly etc.)

# **Assigned Work View**

* 1. Inspectors shall be able to view a list of all the assigned work when he or she login to myAMI.
  2. Project managers shall be able to view list of all the assigned inspections for any inspector.

# **Completed Form Upload**

* 1. Inspectors shall be able to upload a completed form as PDF, Word and Excel file format. File shall be uploaded as is (no conversion is needed). Inspectors are expected to convert the word and excel files to PDF files and upload but system shall allow all three formats for uploading.
  2. Inspectors shall be able to upload file against his or her available work assignment. Let the inspector replace already uploaded file if it is not reviewed and marked as completed by Project manager.
  3. Store the files in standard file format such [company id]-[plant id]-[program id]-[form type]-[timestamp].xxx.
  4. Files shall be stored in a configurable cloud path. Utilize AWS S3 for file storage which shall be accessed through myAMI only.
  5. Project managers shall be able to upload completed forms on behalf of an inspector against any available work assignment for any inspectors. PM shall be asked to choose inspector before uploading.

# **View Recent Completed Forms**

* 1. Inspectors shall be able to view able to view list of all the forms he or she completed in last selected duration i.e. 7 days, 30 days, 90 days.
  2. Inspectors shall be able to open a form (show as hyperlink) from the listed forms and view the contents. Files shall be opened on a new tab. Inspectors may upload PDF files as completed forms but there is a possibility that these files may be in word or excel format as well.
  3. Project managers shall be able to view all the forms completed by all the inspectors in last selected duration.
  4. Project managers shall be able to open each form, review the content in a new tab and then mark each form as complete on the list.
  5. List of all completed forms shall contain date of inspection (form upload date), Inspector’s name, company name, Plant name, Program name and form type.