Business Requirements Document (BRD)

Perceptive Control Solutions LLC- Audit Prodigy

April 2016

Version 1.4

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# Document Revisions

|  |  |  |
| --- | --- | --- |
| Date | Version Number | Document Changes |
| 03/21/2016 | 1.0 | Initial Draft |
| 03/28/2016 | 1.1 | Updated Resource Setup, Project setup based on discussions |
| 04/04/2016 | 1.2 | Added Scheduling, Actual hours, Reports and Issue Tracking |
| 04/05/2016 | 1.3 | Documentation |
| 04/06/2016 | 1.4 | Made changes based on Review comments by the product owner |
| 04/07/2016 | 1.5 | Phase 2, 3 plan included. |
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|  |  |  |

# Approvals

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Title** | **Signature** | **Date** |
| Ravi Mangipudi | Product Owner |  |  |
|  |  |  |  |

# Introduction

## Project Summary

### Objectives

* A cloud-based, mobile enabled audit project control and issue-tracking solution, supporting CAEs with real-time monitoring and finger-tip reporting.
* Subscription Model: “Pay as you use”.
* Mature Security/ Privacy.
* Create and Control Audit Plan and Issues:
* Drag-drop Resource and Project Planning and Actual Time reporting.
* “At-risk” Indicators with Estimated Time to Complete (ETC) inputs.
* Automated Issue/ CAPA tracking, escalation and reporting.
* Finger-tip reporting of Project Status/ Resources against Plan.
* Automated Work-flow Approvals and Escalations.
* Cloud-based: Automated Data Back-ups and Exports.

### Background

* Existing solutions are expensive to implement or maintain- Excel to rescue.
* Increasing complexity causing errors and massive false-positives.
* Too many team meetings/ emails to coordinate status of projects.
* Issue tracking too cumbersome and prone to “falling through cracks”.
* No early warning for “At Risk” projects.
* CFOs/ Audit Committees expecting data-driven reporting from CAEs.

### Business Drivers

* A cloud-based product, easy to use and low maintenance system.
* A mobile enabled product, can be accessed from anywhere and anytime.
* Issue-Tracking solution, provisions CAEs with real-time monitoring and reporting.

## Project Scope

### In Scope Functionality

* Develop the Audit Prodigy product based on the requirements.
* The following items would be prioritized and implemented as part of the Audit Prodigy Phase 1 implementation:

1. Audit Prodigy App Project:

* Design UI Screens as per the requirements provided.
* Product development- Settings, Scheduling, Operations, Issue Tracking, Sub-Certs, Reports, and Data analytics modules.
* Implement mobile enabled screens (Input Actual Hours and some identified reports) for mobile access from anywhere and everywhere.
* Role based security implementation for Client Super Admin, Client Admin and Audit resource access levels.
* Implement notifications and alerts in Operations modules if resources not entering data.
* Develop BI Dashboards.
* Web services and Data access layer implementation.
* Data archiving and data export to CSV/ Excel functionality.
* Data Encryptions and security.
* Develop Product Admin module.

1. Sub-certs Project:

* Develop easy to use sub certs module.
* User management.
* Invitation functionality.
* Reports on completion status.
* Development and optimization of data accuracy.
* Develop, research and provide cloud hosting solutions for the audit Prodigy project.
* Assessment of server/ hosting requirements and setup of needed infrastructure.
* Code and data escrow.
* Troubleshoot any application problems and server issues, including client environments, application configuration, user permissions and data accuracy.

### Out of Scope Functionality

* The following items would be implemented as part of the Audit Prodigy Phase 2 implementation:
* Application maintenance and support of Audit Prodigy Application.
* Extended analytics dashboards to track operations.
* Develop additional reports based on requirements.
* Additional functionality.
* Work papers management.
* Live chat.
* Dynamic role definition and access based on these roles.
* The following items would be implemented as part of the Audit Prodigy Phase 3 implementation:
* Feedback
* Task List

## System Perspective

### Assumptions

* Perceptive Control Solutions LLC will provide all the information required for the development of Audit Prodigy app.
* All Business requirements will be finalized and signed-off on-time.

### Dependencies

* Timely signoff on requirements & design documents.
* Need to identify and finalize Hosting Solution.

# Business Process Overview

## Proposed Business Process (To-Be)

* Product Admin grants Audit Prodigy app free trail/ actual account access privileges to the Client Super Admin.
* Client Super Admin grants/ revokes access to Client Admin.
* Client Admin sets-up, grants/revokes access to resources and complete business, project setup and scheduling.
* Client resources to register and enter actual hours for tracking.

# Business Requirements

## Functional Requirements

### Global Requirements

***Requirement 1:***

* Audit Prodigy Icon should be visible on each and every page, on the top in the right side.
* Every page has a logout option. When logged in, their Name and avatar shall be displayed on every page.
* Session expires upon non-usage after 10 mins and redirects resources to sign-in page.

***Nice to have feature:***

***During a set-up process, can we save a point to go back in the future?***

5.1.2 Audit Prodigy app free trial request form:

***Requirement 1: Request form***

* Request form should have mandatory fields like First Name, Last Name, Company Name, Email, Phone, Industry, Number of expected users and optional fields like Company website and Comments/ Questions.

5.1.3 User Management:

Audit Prodigy app has different types of users:

* Product Admin
* Client Super Admin
* Client Admins
* Users (Audit and Management resources).

5.1.3.1 Product Admin:

***Requirement 1:***

* Once product admin logs into the application, list of all free trial requests should be displayed with options to grant / reject / extend. Default free trial shall be 2 weeks, subject to extension/ reduction by product admin.
  + Details that needs to be displayed are
    - First Name
    - Last Name
    - Company
    - Industry
    - Email
    - Phone
    - Number of expected users
    - Requested date
    - Trial duration
    - Grant Button
    - Reject Button

Active free trial accounts:

* + - First Name
    - Last Name
    - Company Name
    - Trial granted date
    - Expiry date
    - Status
    - Extend Button
    - Delete Button
    - Trial duration counter

***Requirement 2: Notifications***

* Automatic notifications should be triggered to only the free-trial users based on remaining free trial period.
* Automatic First Notification email shall be triggered immediately upon granting free trial access.
* Automatic Second Notification email shall be triggered one week after granting free trial access.
* Automatic Notification email shall be triggered one week prior to expiry of free trial period (including with extension).
* Final Notification email shall be triggered 2 business days prior to expiry of free trial period (including with extension).
* Need to identify notification email content (Ravi to provide the same).

***Requirement 2: Grant Access Functionality***

* Product admin should be able to Grant trial access by clicking Grant button.
* Once the product admin clicks Grant button, email shall be sent to the email ID provided in the request form. (this is Automatic First Notification discussed above).
* Details like User Name (email ID submitted in the request form), system generated temporary password and link to sign-in page shall be sent in an email.
* Need to identify free trial email content (Ravi to provide the same).

***Requirement 3: Reject Access Functionality***

* Product admin should be able to reject trial access by clicking Reject button.
* Once the product admin clicks Reject button, email about the same shall be sent to the email ID provided in the request form.
* Need to identify reject email content (Ravi to provide the same).

***Requirement 4: Free trial Extension***

* Product admin should be able to extend trial period by clicking Extend button.
* Automatic notification email shall be triggered to the user. (Ravi to provide content).

***Requirement 5: Delete free trial account***

* Product admin should be able to delete trial account anytime by clicking Delete button.

***Requirement 6:***

* Product admin should be able to Convert free trial account to actual account.
* Free trial version’s data shall be transferred to actual account version based on user request.
* Automatic notification email shall be triggered to the user. (Ravi to provide content).

5.1.3.2 Client Super Admin:

***Requirement 1:***

* Once the Client Super admin clicks the sign-in page link received in an email, he/she shall be directed to sign-in page.
* Username shall be email ID of the Client Super Admin and pass word shall be system generated password, receive in email.
* He/ she shall be forced to change password on the first sign-in.

***Requirement 2: Trial duration start***

* As soon as the Client Super admin signs-in and changes the password, free trial period count shall be triggered.

***Requirement 3: Client Administrators set-up page***

* Upon successful sign-in and password change, Client Administrators Set-up page shall be displayed.
* Client Administrators set-up page with a list of all Client Administrators with Activate/ Deactivate buttons and Client Admin set-up fields like Administrator Name, Administrator Email text fields, click to add another Administrator button and accept button shall be displayed.
* Should be able to set-up number of Administrators (5 admins for a free trial version).
* As soon as the Client super admin sets up Client Administrators, an email shall be triggered to Client administrators with the link to application sign-in page.
* If Client Super Admin wants to become Client Admin himself, he shall set-up himself as a Client Admin.
* If he is also a Client Admin, when he logs-in in the future, he shall be directed to Client Administrator: Settings Module View page.

***Requirement 4: Activate/ Deactivate Client administrators***

* Client super admin should be able to activate/ deactivate Client administrators from the resource Set-up page.

5.1.3.3 Client Admin:

* Client Admin can’t add/ delete/ edit other client admins.

***Requirement 1:***

* Once the Client admin clicks the sign-in page’s link received from Client admin set-up page, he/she should be directed to sign-in page.
* User Name should be the same email ID entered in Client admin set-up page by the Client Super admin by default.
* Client admins should be able to register themselves by entering and confirming their own password.

***Requirement 2: Directed to All Users: Module view page***

* Client Admin is redirected to All Users: Module View page, with modules like Scheduling, Operations, Reports, Data Analytics, Workflow approvals and Settings.
* When Client Admin clicks Settings, he shall be directed to Client Administrator: Settings Module View page.
* Performs Business Set-up, Calendar Set-up, Resource Set-up, and Project Set-up as needed.
* As soon as the Client Admin sets up the resources, an email shall be triggered to users with the link to application sign-in page.
* If Client Admin sets up himself as a resource, an alert/ pop-up shall be given to Client Admin about email being triggered to Client Super Admin. If he proceeds, email shall be triggered to Client Super Admin.
* Any subsequent changes made by Client Admin to his own (as a resource set-up by himself) details, email shall be triggered to Client Super Admin.

***Requirement 3: Activate/ Deactivate users***

* Client admin should be able to activate/ deactivate only users (and not other client administrators), from the resource Set-up page.

5.1.3.4 Resource:

***Requirement 1:***

* Once the resource clicks the sign-in page’s link received from Resource set-up page, he/she should be directed to sign-in page
* User Name should be the same email ID entered in Resource set-up page by the Client admin by default.
* Resource registers himself/herself by entering a password and confirm password.
* Completes self-Set-up.

***Requirement 2: Directed to Settings Module View page***

* Resource shall be directed to Settings Module view page.
* Modules shall be displayed according to access privileges previously granted in Resource Set-up page by the Client Administrator.

5.1.4 Administrator: Business Set-up

Client Admin shall navigate to Business Set-up page after clicking Business Set-up module in Module view page.

***Requirement 1: Company Logo***

* Client Admin shall upload their company logo by clicking Upload Logo button.

***Requirement 2: Fiscal Year***

* Client Admin should be able to enter Fiscal year (may vary with each company) Start Date and End Date in the format mm/dd.

Example: Jan 01- Dec 31.

***Requirement 3: Current Year***

* Client Admin should be able to enter Current year Start Date and End Date in the format mm/dd/yyyy.

Example: 01/01/2016-12/31/2016.

* Quarters are defined by the system based on the dates entered.

***Requirement 4: Plan Year***

* Client Admin should be able to enter Plan year Start Date and End Date in the format mm/dd/yyyy.

Example: 01/01/2017-12/31/2017.

* Quarters are defined by the system based on the dates entered.

***Requirement 5: Plan+1 Year***

* System should populate Plan+1 year based on the plan year entered, in the format mm/dd/yyyy.

Example: 01/01/2018-12/31/2018.

* Quarters are defined by the system based on the dates entered.

***Requirement 6: Plan+2 Year***

* System should populate Plan+2 year based on the plan year entered, in the format mm/dd/yyyy.

Example: 01/01/2019-12/31/2019.

* Quarters are defined by the system based on the dates entered.

***Requirement 7: Business Objectives***

* Client Admin should be able to enter Business Objectives in Free form text field with maximum 50 characters. There shall be five fields with place holders.
* Client Admin should be able to edit fields.
* Client Admin shall enter another five business objectives by clicking Add More button. Client admin shall add maximum 10 business objectives.
* Client Admin shall be allowed to enter maximum five business objectives.
* Place holders of Business Objectives shall be in gray color and as follows:
* Operations excellence
* On time delivery
* Commercial expansion
* Improved Cash flow
* Customer satisfaction
* Business Objectives help text shall be “Company-wide goals or objectives as defined by senior management”.

***Requirement 8: Business Unit Names***

***Unit Name:***

* Client Admin should be able to enter Unit Name in Free form text field.
* Client Admin shall enter another Unit name by clicking Add button.
* No limit on # of units but limit to 20 characters.

***Sub-Unit Name***

* Client Admin should be able to enter Sub-Unit Name in Free form text field with maximum 50 characters.
* Client Admin shall enter another Sub-Unit name by clicking Add button.
* No limit on # of sub-units but limit to 20 characters.

***Requirement 10: Business Locations***

* Client Admin shall enter Region in Free form text field with maximum 50 characters.
* Client Admin shall select Country, State, City/ enter Free form text field if not available in the drop-down with maximum 25 characters.
* System shall auto complete Region, Country, State and City fields based on previous entries.
* Client Admin shall enter another Region, Country, State and City by clicking Add button.

***Requirement 11: Risk Rating***

* Client Admin shall enter Risk rating in Free form text field with maximum 50 characters.
* Client Admin should be provided with five Free form text fields with maximum 50 characters to enter five different risk ratings.
* Help text shall be “Ex: Systemic, Critical, High, Medium, Low and etc.”.

***Requirement 12: Phases***

* Client Admin shall enter/ edit phase names.
* There are different phases like Travel, Planning, Field-Work, Documentation, Draft Report Writing, Report Review, Final Report issue and so on. Five phase names shall be suggested in grey letters but can be changed by Client Admin.
* Client Admin should be able to add additional Phases by clicking Add button if necessary. Maximum Phases allowed: 10 including the default 5.
* All phases should be editable by clicking Edit button.
* Unused phases shall disappear.
* Every phase should have hours, even zero hours.

***Requirement 13: Accept***

* Client Admin shall click Accept button and store entered details/ Set-up Business.

5.1.5 Administrator: Calendar Set-up

* Client Admin shall navigate to Calendar Set-up page after clicking Calendar Set-up.
* Client Admin shall be able to Set-up different Countries/ regions default calendars in Calendar Set-up.

5.1.6 Administrator: Resource Set-up

* Client Admin shall navigate to Resource Set-up page after clicking Add button in the list of resources page to Set-up a Resource.
* Activate/ Deactivate button shall be displayed next to a resource name in the list of resources’ page.
* Company logo shall be displayed on the left side, in the top of the page.
* Fields like Title, Region, Country, State, City, Manager and Consulting Firm name should be provided with auto-complete feature. System shall memorize details previously entered.

***Requirement 1: Resource Name***

* Client Admin should be able to enter Resource Name in Free form text field with maximum 150 characters.

***Requirement 2: Title***

* Client Admin should be able to enter resource’s Title in Free form text field with maximum 100 characters.

***Requirement 3: Email***

* Client Admin should be able to enter Resource’s Email ID in Free form text field with maximum 300 characters.

***Requirement 4: Region***

* Client Admin should be able to choose the Region from the drop down list.

***Requirement 5: Country and State***

* Client Admin should be able to choose the Country from the drop down list.
* Based on the Country selected, State drop down list shall be populated.
* Country name shall be entered in free form text field with maximum 20 characters. There is no limit on number of countries.
* State name shall be entered in free form text field with maximum 20 characters. There is no limit on number of countries.

***Requirement 6: City***

* Client Admin should be able to choose the City from the drop down list.

***Requirement 7: Manager***

* Client Admin should be able to enter manager in Free form text field with maximum 150 characters. Manager name shall be memorized.
* If a manager name is used once, on the next usage of the same name, it shall be prompted when a resource enters first one or two letters. Resource shall be able to override the prompted name.

***Requirement 8: Audit Resource?***

* Client Admin should be able to choose Yes or No Radio button to capture if the Resource is Audit or Management Resource.
* If YES is chosen, resource is Audit Resource.
* If NO is chosen, resource is Management Resource.

***Requirement 9: Consultant?***

* Client Admin should be able to select Yes or No from the drop down list, with NO being default.
* If yes is chosen, a Free form text field with maximum 150 characters should appear to enter Name of the Consulting Firm. Consulting firm name shall be memorized.
* If a name is used once, on the next usage of the same name, it shall be prompted when a resource enters first one or two letters. Resource shall be able to override the prompted name.

***Requirement 10: Common Holidays***

* Populate Calendar from the Calendar Set-up page based on the preferred country.

***Requirement 11: Phone Number (Optional)***

* Can be entered either in resource setup or resource self-setup.

***Requirement 12: Access Privileges***

* Client Admin should be able to grant access privileges by checking Read Only and Read & Write boxes for Plan, Operations, Analytics, Billing, Report 1: Plan Report for Audit Committee (For Plan Year), Report 2: Plan Report for Audit Committee (Prior+ Plan Future Years), Report 3: Project Status until Report 7: Scheduled Hours Preview (By Resource).
* Checking boxes signifies enablement of access privilege.

***Requirement 13: Accept***

* Client Admin shall click Accept button to enter Resource details/ Set-up Resource.
* Upon Accept button click, email shall be triggered to the resource with a link to next screen (Resource Self Set-up).

5.1.7 Project Set-up

* Client Admin shall navigate to Project Set-up after clicking Project Set-up module in Module view page.
* Company logo shall be displayed on the left side, in the top of the page.
* Only Client Admin can Set-up Projects, until and unless they give a Resource the authority to do so.

***Requirement 1: Year***

* Client should be able to select a year from the drop down list of Current Year, Plan Year, Plan+1 year, and Plan+2 Year.

***Requirement 2: Project Name***

* Client Admin shall enter Project Name in Free form text field with maximum 150 characters.

***Requirement 3: Project Number***

* Client Admin shall enter Project Number in Free form text field with maximum 30 characters.

***Project Type***

Project Type should be a hierarchy with five levels.

***Requirement 4:*** ***Project Type 1***

* Client Admin should be able to enter Project Type 1 in Free form text field with maximum of 150 characters. Client Admin should be able to Add another Type 1, available up to 10 Type 1s. *For example, “SOX” and “Compliance”*

***Requirement 5:*** ***Project Type 2***

* Client Admin should be provided with Add Type 2 button to click and enter Type 2 if he needs to else he can skip to the next field, Risk Rating.
* On Add Type 2 button click, a new Free form text field appears in which Client Admin shall enter Project Type 2. Client Admin should be able to Add another Type 2, available up to 20 Type 2s. *For example, “SOX - Financial “and “SOX – IT”.*

***Requirement 6:*** ***Project Type 3***

* Client Admin should be provided with Add Type 3 button to click and enter Type 3 if he needs to else he can skip to the next field, Risk Rating.
* On Add Type 3 button click, a new Free form text field appears in which Client Admin shall enter Project Type 3. Client Admin should be able to Add another Type 3, available up to 30 Type 3s. *For example, “SOX-Financial-O2C” and “SOX-IT-Access Controls”.*

***Requirement 7:*** ***Project Type 4***

* Client Admin should be provided with Add Type 4 button to click and enter Type 4 if he needs to else he can skip to the next field, Risk Rating.
* On Add Type 4 button click, a new Free form text field appears in which Client Admin shall enter Project Type 4. Client Admin should be able to Add another Type 4, available up to 40 Type 4s. *For example, “SOX-Financial-O2C-Contracts” and “SOX-IT-Access Controls-Application Level”.*

***Requirement 8:*** ***Project Type 5***

* Client Admin should be provided with Add Type 5 button to click and enter Type 5 if he needs to else he can skip to the next field, Risk Rating.
* On Add Type 5 button click, a new Free form text field appears in which Client Admin shall enter Project Type 5. Client Admin should be able to Add another Type 5, available up to 50 Type 5s. *For example, “SOX-Financial-O2C-Contracts-Control #101” and “SOX-IT-Access Controls-Application Level-Control #201”*

***Note: Very Nice to have Feature - Based on the Project Type hierarchy set-up, need to display a preview screen with all the projects- similar to an Org chart.***

***Requirement 9: Risk Rating***

* Client Admin should be able to select Risk Rating from the drop down list.

***Requirement 10 Business Unit***

* Client Admin should be able to select multiple Business Units from the drop down list.

***Requirement 11: Sub-Business Unit***

* Client Admin should be able to select multiple Sub-Business Units from the drop down list.

***Requirement 12: Business Objective***

* Client Admin should be able to select multiple Business Objective from the drop down list.

***Requirement 13: Region***

* Client Admin should be able to choose multiple Regions from the drop down list.

***Requirement 14: Country and State***

* Client Admin should be able to choose multiple Countries from the drop down list.
* If a country is not available, client admin selects ‘Others’ and a free form text field appears.
* Based on the Country selected, State drop down list shall be populated.
* Country name shall be entered in free form text field with maximum 20 characters. There is no limit on number of countries.
* State name shall be entered in free form text field with maximum 20 characters. There is no limit on number of countries.

***Requirement 15: City***

* Client Admin should be able to choose multiple Cities from the drop down list.
* If a city is not available, client admin selects ‘Others’ and a free form text field appears.
* City name shall be entered in free form text field with maximum 20 characters. There is no limit on number of countries.

***Requirement 16: Project Manager***

* Client Admin should be able to choose a Project Manager from the drop down list of all Audit Resources only- not management resources. Need to provide informational icon to advise that Project Managers should be set-up first, so they can be selected from the drop-down.
* Client Admin should be able to choose more than one Project Manager from the drop down list.

***Requirement 17: Planned for Quarter***

* Client Admin should be able to choose the Planned for Quarter from the drop down list of Quarters defined by the system based on a year selected.

***Requirement 18: Phases***

* Every project has different phases like Travel, Planning, Field-Work, Documentation, Draft Report Writing, Report Review, Final Report issue and so on. These phase names are suggested in grey letters but can be changed by Client Admin.
* Client Admin should be able to add additional Phases by clicking Add button if necessary. Maximum Phases allowed: 10 including the default 5.
* All phases should be editable by clicking Edit button.
* Unused phases shall disappear.
* Every phase should have hours, even zero hours.

***Requirement 19: Travel hours***

* Client Admin should be able to enter number of Travel hours in Free form text field with maximum 4 characters.
* Client Admin should have a check box to choose, if this phase is billable, with default being NO.

***Requirement 20: Planning***

* Client Admin should be able to enter number of Planning hours in Free form text field with maximum 4 characters.
* Client Admin should have a check box to choose, if this phase is billable, with default being NO.

***Requirement 21: Field-Work hours***

* Client Admin should be able to enter number of Field-Work hours in Free form text field with maximum 4 characters.
* Client Admin should have a check box to choose, if this phase is billable, with default being NO.

***Requirement 22: Documentation hours***

* Client Admin should be able to enter number of Documentation hours in Free form text field with maximum 4 characters.
* Client Admin should have a check box to choose, if this phase is billable, with default being NO.

***Requirement 23: Draft Report Writing hours***

* Client Admin should be able to enter number of Draft Report Writing hours in Free form text field with maximum 4 characters.
* Client Admin should have a check box to choose, if this phase is billable, with default being NO.

***Requirement 24: Report Review hours***

* Client Admin should be able to enter number of Report Review hours in Free form text field with maximum 4 characters.
* Client Admin should have a check box to choose, if this phase is billable, with default being NO.

***Requirement 25: Final Report Issue hours***

* Client Admin should be able to enter number of Final Report Issue hours in Free form text field with maximum 4 characters.
* Client Admin should have a check box to choose, if this phase is billable, with default being NO.

***Requirement 26: Total Project Hours***

* Total Project Hours shall be displayed with the Sum of all phase hours with maximum 5 characters.

***Requirement 27: Accept***

* Client Admin shall click Accept button to enter Project details/ Set-up Projects.

***Requirement 28: Add Project***

* Client Admin should be able to click Add Project button to enter a new Project with details like Project Name, Project Number, different Project Types and all related Project Details.

5.1.8 All Resources: Self Set-up

* Company logo shall be displayed on the left side, in the top of the page.
* Initial Set-up and subsequent changes (only for specialties and vacation/unique holidays/ unplanned days off) made by resource in this screen triggers emails to the client admin.

***Requirement 1: Name***

* Name of the resource signed in shall appear in this field, which was filled in by the client admin in Resource Set-up page.

***Requirement 2: Title***

* Title of the resource shall appear in this field, which was filled in by the client admin in Resource Set-up page.

***Requirement 3: Country and State***

* Country of the resource shall appear in this field, which was filled in by the client admin in Resource Set-up page.
* Based on the Country selected, State drop down list shall be populated.
* Country name shall be entered in free form text field with maximum 20 characters. There is no limit on number of countries.
* State name shall be entered in free form text field with maximum 20 characters. There is no limit on number of countries.

***Requirement 4: City***

* City of the resource shall appear in this field, which was filled in by the client admin in Resource Set-up page.

***Requirement 5: Region***

* Region of the resource shall appear in this field, which was filled in by the client admin in Resource Set-up page.

***Requirement 6: Avatar***

* Pre-defined DD menu shall be provided to a resource to select avatar.
* Import image button shall be provided to upload their own image from their PC.

***Requirement 7: Password***

* Password field shall be provided to enter resource preferred password with maximum 8 characters.

***Requirement 8: Vacation***

* A calendar shall be provided to enter vacation dates.

***Requirement 9: Unique Holidays***

* A calendar shall be provided to enter unique holidays.

***Requirement 10: Unplanned Days Off***

* A calendar shall be provided to enter Unplanned Days Off.

***Requirement 11: Mobile Phone number***

* A resource shall be provided with a free form text field, with maximum 15 characters, to enter mobile phone number (with country or area code).

***Requirement 12: User Name***

* A resource shall be provided a free form text field with maximum 50 characters to enter their preferred user name.

***Requirement 13: Specialties***

* There shall be six pre-defined specialties which shall be editable by a resource.
* There shall be another six blank free form text fields with maximum 100 characters to enter specialties by a resource.
* These blank fields shall appear in light grey before use and should disappear if not used.
* Each and every specialty shall be memorized after each entry by a resource.
* When a subsequent resource enters first two characters of previously memorized entries, they shall appear.

***Requirement 14: Accept***

* Once a resource completes Self-Setup and clicks Accept button, all details shall be entered and Self-Set-up process shall be completed.

5.1.9 All resources: Sign-in

* Company logo shall be displayed on the left side, in the top of the page.

***Requirement 1: User Name***

* A free form text field with maximum 100 characters shall be provided for the resource to enter user name.

***Requirement 2: Password***

* A free form password text field with maximum 8 characters shall be provided for the resource to enter password.

***Requirement 3: Forgot Password***

* Forgot password button shall be provided.
* If the resource forgets his/ her password, upon the button click am email shall be triggered with password reset instructions.

***Requirement 4: Invalid User Name/ Password***

* When a resource enters invalid username/ password/ both, a message shall be displayed saying “Invalid User Name /Password. Please enter correct User Name/ Password”.

5.1.10 All Users: Module View

* Module View page shall be displayed to all resources.
* Company logo shall be displayed on the left side, in the top of the page.

***Requirement 1:***

* Modules shall be displayed to resources, based on their login in All- resources sign-in page and according to their access privileges defined by Client Admin in Resource Set-up page.
* Non-accessible Modules shall not be displayed at all (based on their login in All-resources sign-in page).

***Requirement 2:***

* Modules to be displayed shall be Scheduling, Operations, Reports, Data Analytics, Work Flow Approvals and Settings.
* All Modules shall be in the button format.
* Count of Open Approvals shall be displayed on the top right corner of the Workflow Approvals button.
* Upon each button click, resource shall be navigated to that particular module.

***Requirement 3:***

* Settings button shall be displayed and accessible to only Client Admin (based on their login in All-resources sign-in page).
* Upon Settings button click, Client Admin shall be navigated to Client Administrator: Settings Module View.

5.1.11 Scheduling

* Client Admin shall navigate to Scheduling page after clicking Scheduling module in All resources: Module view page.
* Company logo shall be displayed on the left side, in the top of the page.
* Only Client Admin can Schedule.

***Requirement 1: Project Name***

* Client Admin should be able to select the Project from drop down list of all Projects.
* Here, projects shall be prioritized that have not been fully scheduled, first.
* Project drop down shall have the search box to show filtered list.

***Requirement 2: Phase:***

* Client Admin should be able to select Phase from the drop down list of all phases.
* Counter of Unscheduled Phase hours shall be present on the top of the Phase selected.

***Requirement 3: Project Types***

* Project types (type 1, type 2 etc.) shall be populated based on the project selected.

***Requirement 4: Region***

* Region shall be populated based on the Project selected.

***Requirement 5: Country and State***

* Country shall be populated based on the Project selected.
* Based on the Country selected, State drop down list shall be populated.

***Requirement 6: City***

* City shall be populated based on the Project selected.

***Requirement 7: Risk Rating***

* Risk Rating shall be populated based on the Project selected.

***Requirement 8: Project Manager***

* Project Manager shall be populated based on the Project selected.

***Requirement 9: Total Project Hours Planned***

* Total Project hours planned from Project Set-up screen shall be displayed.
* Counter of Unscheduled Total Project Hours shall be present on the top of total hours planned.

***Requirement 10: Phase Hours Planned***

* Total Phase hours planned from the Project Set-up screen shall be displayed.
* Counter of Unscheduled Phase Hours shall be present on the top of phase hours planned.

***Requirement 11: Resource (sorting?)***

* Display only audit resources.
* Resources shall be displayed in descending order of their total availability for that particular week.
* Avatar/ photo of the resource shall appear next to the resource name.

***Requirement 12: Calendar***

* Calendar shall have work week displayed by default with an option to see weekends.
* Client Admin should be able to schedule number of hours for a particular available Resource on the Calendar by entering number of hours on a day cell. Single click will allocate 8 hours by default and double click will enable then to enter number of hours manually (but they can never enter more than 24 hours).
* If resource is completely available cell shall be displayed in green color.
* If number of scheduled hours is less than 8, cell on the calendar (for a Resource shall) be yellow/ orange in color.
* If number of scheduled hours is equal to or greater than 8 (assuming that Resource works for 8 hours a day), cell on the calendar (for a Resource) shall be red in color (indicating that the resource is unavailable for that day).
* Single click on a partially allocated cell should allocate “8-previous allocated hours” for the current project and phase.
* Double click on partially allocated cell allows to enter number of hours manually for this project/ phase. Validation on allocation not to exceed 24 hours.
* Single click/ double click on fully allocated cell shall display a small pop-up with details on previous allocations with option to edit/ deallocate and then allocate to this project/phase.
* Holidays / Vacations / Unplanned Days-off shall be displayed in dark blue. These can not be scheduled. Actual Hours can be input in these days as well.
* Hover on unavailable days (blue) should provide a message to admin to have a resource change their calendar (made the day available) before trying to schedule for that day.

***Requirement 13: Preview Report by Project***

* Client Admin should be able to Preview Report of Scheduled Hours by Project, on ‘Preview Report by Project button click’.

***Requirement 14: Preview Report by Resource***

* Client Admin should be able to Preview Report of Scheduled Hours by Resource, on ‘Preview Report by Resource button click’.

***Requirement 15: Save***

* Client Admin should be able to finalize scheduling by clicking Save button.
* On Save button click, emails shall be triggered to impacted Resources and Project managers about the changes made in the page.

5.1.12 All resources: Input Actual Hours (Project Listing)

* Company logo shall be displayed on the left side, in the top of the page.
* Resource shall be navigated to this page upon Operations Module button click in All resources: Module View page.

***Requirement 1: Projects***

* A list of all open Projects (that were not marked “Complete” and approved by Project Manager in All resources: Input Actual Hours page) shall be displayed in this page.
* Details for each Project like Project Name, Project Number and Location like Region, Country, State, City shall be displayed.
* When a resource clicks on a Project, he/she shall be navigated to the next page i.e., All resources: Input Actual Hours.

***Requirement 2: Finalize and Notify***

* Upon Finalize button click, email shall be triggered to a resource and project manager.
* Need to identify email content (Ravi to provide email content).

5.1.13 All resources: Input Actual Hours

* Company logo shall be displayed on the left side, in the top of the page.
* Resource shall be navigated to this page upon clicking a Project in Input Actual Hours (Project Listing) page.

***Requirement 1: Projects***

* Resource clicked project name in Input Actual Hours (Project Listing) page shall be displayed here.

***Requirement 2: Phases***

* All phases (that were not marked “Complete” and approved by Project Manager in All resources: Input Actual Hours page) pertaining to the Project selected, like Travel, Planning, Field Work, Documentation, Draft Report, Report Review, Final Report, shall be displayed for which a resource inputs hours.
* Check marks shall be displayed next to the phase if complete.
* The Resource shall be able to click the check mark to indicate that the Phase is complete.
* This shall trigger an approval request to Project Manager (which is shown in the Workflows module to the Project Manager). If no project manager is identified this will be auto approved and turns green.
* The check mark stays in yellow until the Project Manager approves, then it turns to Green.
* Only a Project Manager should be able to re-open / change status back to “Not Complete” or no check mark, even after it was previously approved.

***Requirement 3: Check Mark***

* Display a Check Mark if Phase is complete, next to each phase.

***Requirement 4: Calendar***

* Calendar shall have week view.
* Calendar shall display maximum three weeks, i.e., two prior weeks and current week.
* Only client admin can input up to a prior month from current date.
* A blank cell shall be displayed automatically.
* One click lets any input of less than 24 hours.
* The cell coloring display shall be dark blue for holidays/vacations/unplanned days off, as well as for partially scheduled and fully scheduled days - similar to “Scheduling” -- the Resource should be able to enter hours in all those cells (*The logic is that a Resource would want to know what he/she was scheduled for before entering actual hours).*

***Requirement 5: Total Actual Hours***

* Total of Actual input hours for the week for each phase shall be displayed under the heading Total Actual Hours.
* The color coding buttons at the bottom shall turn red if the total project hours for that week exceeds 40 hours. The default color shall be green.

***Requirement 6: Total Scheduled Hours***

* Total Scheduled hours for the week for each phase shall be displayed under the heading Total Scheduled Hours.

***Requirement 7: Estimated to Complete Hours (ETC)***

* Estimated to Complete Hours (ETC) shall be at phase level.

Option 1:

* Estimated to Complete Hours (ETC) shall be auto calculated based on Total Scheduled Hours for this project/phase for this resource- Total Actual Hours for this project/phase by this resource, if there is no Remaining Hours Column (Option to consider is to allow two columns – one for “Remaining Hours” and one for “ETC” at Phase level).

Option 2:

* Estimated to Complete Hours (ETC) shall be left blank for a resource to input hours, if there is a column for Remaining Hours (calculated based on Total Scheduled Hours for this project/phase for this resource- Total Actual Hours for this project/phase by this resource).

***Requirement 8: Comments***

* A Free form text filed shall be displayed with maximum of 120 characters, on the right side, for a resource to input their Comments.

***Requirement 9: Project Total Hours***

* Total of Actual input hours for all phases for that day, shall be displayed as Project Total Hours in the bottom.

***Requirement 10: All Projects total***

* Running total for all projects for which the resource enters actual hours for that day/ week.
* The color coding buttons at the bottom shall turn red if the total project hours for that day exceeds 8 hours. The default color shall be green.

***Requirement 11: Preview***

* Upon Preview button click, resource shall be displayed with Report Actual to Plan by Project and Resource to date.

***Requirement 12: Save***

* Upon Save button click, resource shall be redirected to Input Actual Hours (Project Listing), if there are any scheduled phases that remain without being check marked as complete.
* If not, Resource is redirected to Module display and allowed to logout.

***General Report Requirements:***

* Export formats needed shall be Excel, PDF, and Word Document.

5.1.14 Report 1: Plan Report for Audit Committee (For Plan Year)

* Access to this report is as per permissions granted.
* Company logo shall be displayed on the left side, in the top of the page.
* Report name i.e., Plan Report for Audit Committee (For Plan Year) shall appear on the top of the report, in the center.

***Requirement 1: Plan Year***

* Plan Year shall be displayed on the top of the report, in the center.

***Note: As of Date functionality:***

* ***Very nice to have feature.***

***Requirement 2: Risk Rating***

* Risk rating of all projects shall be displayed.
* Risk Rating shall be sorted in Highest to Lowest order.

***Requirement 3: Project Type***

* Project Types shall be displayed.

***Requirement 4: Project Name***

* Project Names shall be displayed.

***Requirement 5: Q1 Plan Hours***

* Plan hours for the first quarter of a project shall be displayed under the heading Q1 Plan Hours.

***Requirement 6: Q2 Plan Hours***

* Plan hours for the second quarter of a project shall be displayed under the heading Q2 Plan Hours.

***Requirement 7: Q3 Plan Hours***

* Plan hours for the third quarter of a project shall be displayed under the heading Q3 Plan Hours.

***Requirement 8: Q4 Plan Hours***

* Plan hours for the fourth quarter of a project shall be displayed under the heading Q4 Plan Hours.

***Requirement 9: Plan Year Total Hours***

* Total Plan Hours for the entire Plan Year of a project shall be displayed under the heading Plan Year Total Hours.

***Requirement 10: Total Plan Hours***

* Total Plan Hours for each Quarter, and Plan Year total hours of all Projects shall be displayed at the bottom of the Report.

***Requirement 11: Total Available Hours***

* Total Available Hours for each Quarter, and Plan Year total hours of all Projects shall be displayed at the bottom of the Report.

***Requirement 12: Total Consultant Hours***

* Total Consultant Hours for each Quarter, and Plan Year total hours of all Projects shall be displayed at the bottom of the Report.

***Requirement 13: Text Field***

* A free form text field with maximum 150 characters shall be provided for the resource to input their comments at the bottom of the page.

***Requirement 14: Print/Export***

* When a resource clicks Print/ Export button, a pop-up shall appear for the user to select between Print or Export radio button.
* A resource shall confirm their selection by clicking Confirm button in the pop-up.
* If a resource selects Export button, he/she shall be given an option to choose the format they would like to export to.

5.1.15 Report 2: Plan Report for Audit Committee (Prior + Plan + Future Years)

* Access to this report is as per permissions granted.
* Company logo shall be displayed on the left side, in the top of the page.
* Report name i.e., Plan Report for Audit Committee (Prior + Plan + Future Years) shall appear on the top of the report, in the center.

***Requirement 1: Plan Year***

* Plan Year shall be displayed on the top of the report, in the center.

***Note: As of date***

***Nice to have feature***

***Requirement 2: Risk Rating***

* Risk rating of all projects shall be displayed.
* Risk Rating shall be sorted in High to Low order.

***Requirement 3: Project Type***

* Project Types shall be displayed.

***Requirement 4: Project Name***

* Project Names shall be displayed.

***Requirement 5: Q1 Plan Hours***

* Plan hours for the first quarter of a project shall be displayed under the heading Q1 Plan Hours.

***Requirement 6: Q2 Plan Hours***

* Plan hours for the second quarter of a project shall be displayed under the heading Q2 Plan Hours.

***Requirement 7: Q3 Plan Hours***

* Plan hours for the third quarter of a project shall be displayed under the heading Q3 Plan Hours.

***Requirement 8: Q4 Plan Hours***

* Plan hours for the fourth quarter of a project shall be displayed under the heading Q4 Plan Hours.

***Requirement 9: Plan Year Total Hours***

* Total Plan Hours for the entire Plan Year of a project shall be displayed under the heading Plan Year Total Hours.

***Requirement 10: Prior Year Total Hours***

* Total Plan Hours for the entire Prior Year of a project shall be displayed under the heading Prior Year Total Hours.

***Requirement 11: Next Year 1 Total Hours***

* Total Plan Hours for the entire next one year of a project shall be displayed under the heading Next Year 1 Total Hours.

***Requirement 12: Next Year 2 Total Hours***

* Total Plan Hours for the entire next two years of a project shall be displayed under the heading Next Year 2 Total Hours.

***Requirement 13: Total Plan Hours***

* Total Plan Hours for each Quarter, Plan Year total hours, Prior Year Total Hours, Next Year 1 Total Hours and Next Year 2 Total Hours of all Projects shall be displayed at the bottom of the Report.

***Requirement 14: Total Available Hours***

* Total Available Hours for each Quarter, Plan Year total hours, Prior Year Total Hours, Next Year 1 Total Hours and Next Year 2 Total Hours of all Projects shall be displayed at the bottom of the Report.

***Requirement 15: Total Consultant Hours***

* Total Consultant Hours for each Quarter, Plan Year total hours, Prior Year Total Hours, Next Year 1 Total Hours and Next Year 2 Total Hours of all Projects shall be displayed at the bottom of the Report.

***Requirement 16: Text Field***

* A free form text field with maximum 150 characters shall be provided for the resource to input their comments at the bottom of the page.

***Requirement 17: Print/Export***

* When a resource clicks Print/ Export button, a pop-up shall appear for a resource to select between Print or Export radio button.
* A resource shall confirm their selection by clicking Confirm button in the pop-up.
* If a resource selects Export button, he/she shall be given an option to choose the format they would like to export to.

5.1.16 Report 3: Project Status

* Access to this report is as per permissions granted.
* Company logo shall be displayed on the left side, in the top of the page.
* Report name i.e., Project Status shall appear on the top of the report, in the center.
* This report appears as a screen allowing input only into the Comments section.

***Requirement 1: Project Type***

* Project Types shall be displayed.

***Requirement 2: Project Name***

* Project Names shall be displayed.

***Requirement 3: Risk Rating***

* Risk rating of all projects shall be displayed.

***Requirement 4: Plan Hours***

* Plan Hours of each project shall be displayed.

***Requirement 5: Q1***

* A bubble shall appear under Q1, next each project.
* When a resource clicks the bubble, its color shall change.
* There shall be Black, Grey, White and Yellow colors, each signifying their own meaning.

***Requirement 6: Q2***

* A bubble shall appear under Q2, next each project.
* When a resource clicks the bubble, its color shall change.
* There shall be Black, Grey, White and Yellow colors, each signifying their own meaning.

***Requirement 7: Q3***

* A bubble shall appear under Q3, next each project.
* When a resource clicks the bubble, its color shall change.
* There shall be Black, Grey, White and Yellow colors, each signifying their own meaning.

***Requirement 8: Q4***

* A bubble shall appear under Q4, next to each project.
* There shall be Black, Grey, White and Yellow colored bubbles, each signifying their own meaning.

***Requirement 9: Bubble Colors***

* Each bubble shall have a particular color based on different scenarios.
* When the bubble’s color is Black, it signifies that the project is complete which can be known from Input Actual Hours page, in a particular quarter. This shall be check marked by the Project Manager.
* When the bubble’s color is Grey, it signifies that the project is in progress in a particular quarter. Actual time has been recorded but not check marked complete in Input Actual Hours page.
* When the bubble’s color is White, it signifies that Project is scheduled in Administrator Scheduling Page, but not started. (no Actual Hours recorded against the project)
* When the bubble’s color is Yellow, it signifies that Project is planned in a particular quarter in Projects Set-up page. However, it is scheduled in a different quarter in Administrator Scheduling page. This colored bubble shall be displayed in the scheduled quarter.

***Requirement 10: Comments***

* A free form text field, under the heading ‘Comments’, with maximum 120 characters shall appear for each project, to input comments.
* If there are no comments input, Comments title shall not be displayed.

***Requirement 11: Print/Export***

* When a resource clicks Print/ Export button, a pop-up shall appear for a resource to select between Print or Export radio buttons.
* A resource shall confirm their selection by clicking Confirm button in the pop-up.
* If a resource selects Export button, he/she shall be given an option to choose the format they would like to export to.

5.1.17 Report 4: Actual to Scheduled by Project and Resource to date

* Access to this report is as per permissions granted.
* Company logo shall be displayed on the left side, in the top of the page.
* Report name i.e., Actual to Scheduled by Project and Resource to date shall appear on the top of the report, in the center.

***Requirement 1: Table format***

* Represent data in the form a table. There shall be two tables next to each other.

**First table shall have:**

* Project Name, Resource Name, and Project Total Hours in the first column, Scheduled Hours, Actual Hours, Variance, Complete? In subsequent columns.

***Requirement 1: Project Name***

* Project Names shall be displayed.
* Projects shall be sorted in completed projects as first.

***Requirement 2: Resource Name***

* Resources who have been allotted to a project shall be displayed under Project Name.

***Requirement 3: Scheduled Hours***

* Number of hours scheduled for a resource shall be displayed in the Scheduled Hours column.
* Data source for this information shall be scheduling page.

***Requirement 4: Actual Hours***

* Actual hours input by a resource shall be displayed in the Actual Hours column.
* Data source for this information shall be Input Actual Hours page.

***Requirement 5: Variance***

* Variance between Scheduled hours and Actual Hours shall be calculated based on (Scheduled hours -Actual hours) and displayed in Variance column.

***Requirement 6: Complete?***

* Display check mark bubble, in the column Complete?, if it is complete.
* Display ‘NO’ bubble, in the column Complete?, if it is not complete.
* Data source for this information shall be Input Actual Hours page.

***Requirement 7: Project Total***

* Total values of each column like Scheduled Hours, Actual hours, and Variance shall be displayed in this row.

***Second table shall have:***

* Estimated to Complete hours (ETC), Remaining Hours, and Variance columns.

***Requirement 1: ETC***

* Estimated to complete hours shall be displayed in ETC column.
* Data source for this information shall be Input Actual Hours page.

***Requirement 2: Remaining Hours***

* Remaining hours are calculated based on (Total Scheduled Hours for this project for this resource- Total Actual Hours for this project by this resource) and displayed in Remaining Hours column.

***Requirement 3: Variance***

* Variance between ETC and Remaining Hours shall be calculated based on (ETC- Remaining Hours) and displayed in Variance column.

***Requirement 4: Project Total***

* Total values of each column like ETC, Remaining Hours, and Variance shall be displayed in this row.

***Requirement 2: Print/ Export***

* When a resource clicks Print/ Export button, a pop-up shall appear for a resource to select between Print or Export radio buttons.
* A resource shall confirm their selection by clicking Confirm button in the pop-up.
* If a resource selects Export button, he/she shall be given an option to choose the format they would like to export to.

5.1.18 Report 5: Resource Utilization

* Access to this report is as per permissions granted.
* There shall be three levels of accessibility based on authorization level- Total function, Project Manager and Team Member/ Resource.
* Higher authority people can see all projects’ information, Project Manager can see his projects’ information and Resource can see only his information.
* Company logo shall be displayed on the left side, in the top of the page.
* Report name i.e., Resource Utilization shall appear on the top of the report, in the center.
* Data shall be represented in tabular format.

***Requirement 1: For the week***

* Resource shall be able to select the week from the drop down list. All information pertaining to that week shall be displayed in the table below.

***Requirement 2: Resources***

* Resource names shall be displayed in the column Resources.

***Requirement 3: A. Available Hours***

* Number of available hours for each resource shall be displayed in A. Available Hours Column.
* Data source for this information shall be resource Set-up Page’s Calendar.

***Requirement 4: B. Scheduled Hours***

* Number of hours scheduled for a resource shall be displayed in the B. Scheduled Hours column.
* Data source for this information shall be “Administrator: Scheduling” page.

***Requirement 5: C. Actual Hours***

* Actual hours input by a resource shall be displayed in the C. Actual Hours column.
* Data source for this information shall be Input Actual Hours page.

***Requirement 6: D. Variance Unscheduled Hours***

* Variance Unscheduled Hours for a resource shall be displayed in this column based on (A. Available Hours- B. Schedule hours).

***Requirement 7: E. Variance Unworked Hours***

* Variance Unworked Hours for a resource shall be displayed in this column based on (B. Scheduled Hours – C. Actual Hours).

***Requirement 8: % Variance Unscheduled Hours D/ A***

* Variance % for Unscheduled Hours D/A shall be calculated based on (D. Variance Unscheduled Hours / A. Available Hours) and displayed in this column.

***Requirement 9. % Variance Un-Worked Hours E/ B***

* Variance % for Un-Worked Hours E/B shall be calculated based on (E. Variance Unworked Hours/ B. Scheduled Hours) and displayed in this column.

***Requirement 10. Print/ Export***

* When a resource clicks Print/ Export button, a pop-up shall appear for a resource to select between Print or Export radio buttons.
* A resource shall confirm their selection by clicking Confirm button in the pop-up.
* If a resource selects Export button, he/she shall be given an option to choose the format they would like to export to.

5.1.19 Report 6: Scheduled Hours Preview (By Project)

* Access to this report is as per permissions granted.
* Company logo shall be displayed on the left side, in the top of the page.
* Report name i.e., Scheduled Hours Preview (By Project) shall appear on the top of the report, in the center.
* This is a preview of a report by Project from Scheduling page.

***Requirement 1: Year***

* Year shall be displayed on the top, in the center of the report.
* Year is changeable parameter based on a resource input.

***Requirement 2: Quarter***

* Quarter shall be displayed on the top, below Year, in the center of the report.

***Requirement 3: Project Name***

* Name of the project shall be displayed under the heading Project Name.

***Requirement 4: Resource Title***

* Title of each resource allocated to the project, shall be displayed under the heading Resource Title.

***Requirement 5: Resource Name***

* Name of each resource allocated to the project, shall be displayed under the heading Resource Name and next to Resource Title.

***Requirement 6: Week mm/dd/yyyy to mm/dd/yyyy***

* Week with ‘From’ date to ‘To’ date of a particular quarter shall be displayed as the heading of the column.
* Number of hours scheduled for each resource of a particular project, for each week shall be displayed under the heading Week.

***Requirement 7: Print/ Export***

* When a resource clicks Print/ Export button, a pop-up shall appear for a resource to select between Print or Export radio buttons.
* A resource shall confirm their selection by clicking Confirm button in the pop-up.
* If a resource selects Export button, he/she shall be given an option to choose the format they would like to export to.

5.1.20 Report 7: Scheduled Hours Preview (By Resource)

* Access to this report is as per permissions granted.
* Company logo shall be displayed on the left side, in the top of the page.
* Report name i.e., Scheduled Hours Preview (By Resource) shall appear on the top of the report, in the center.
* This is a preview of a report by Resource from Scheduling page.

***Requirement 1: Year***

* Year shall be displayed on the top, in the center of the report.

***Requirement 2: Quarter***

* Quarter shall be displayed on the top, below Year, in the center of the report.

***Requirement 3: Resource Name***

* Name of a resource shall be displayed under the heading Resource Name.

***Requirement 4: Resource Title***

* Title of a resource next to each resource name, shall be displayed under the heading Resource Title.

***Requirement 5: Project Name***

* Name of all projects a resource is allocated to, shall be displayed under the heading Project Name.

***Requirement 6: Week mm/dd/yyyy to mm/dd/yyyy***

* Week with ‘From’ date to ‘To’ date of a particular quarter shall be displayed as the heading of the column.
* Number of hours scheduled for each project to a resource, for each week shall be displayed under the heading Week.
* Source for the data is “Administrator: Scheduling” screen.

***Requirement 7: Print/ Export***

* When a resource clicks Print/ Export button, a pop-up shall appear for a resource to select between Print or Export radio buttons.
* A resource shall confirm their selection by clicking Confirm button in the pop-up.
* If a resource selects Export button, he/she shall be given an option to choose the format they would like to export to.

5.1.21 Issue Tracking (Optional Module)

* Company logo shall be displayed on the left side, in the top of the page.

***Requirement 1: Read only display***

* Project Name, Project Number, Project Type and other details of the project shall have read-only display.

***Requirement 2: Issue Name***

* Only Audit resource can enter/ edit/ delete issue details.
* Audit resource shall be provided a free form text field with maximum 100 characters to enter Issue name.

***Requirement 3: Issue Number***

* Issue number shall be auto generated.

***Requirement 4: Issue Type***

* A free form text field with maximum 100 characters shall be provided to enter Issue Type.

***Requirement 5: Issue Description***

* A free form text area with maximum 200 characters shall be provided to enter issue description.

***Requirement 6: Corrective Action Responsible Name***

* A drop down of only Management Resources list shall be provided to select a person/s responsible for corrective action. More than one person may be responsible for the same corrective action – need to provide options to add up to five names against each issue.
* If a resource is not available in the drop down list, auditor resource shall be provided an option to add a new management resource to tag to this issue.
* Validation shall be enforced to avoid adding any existing audit resource as a management resource should be there.

***Requirement 7: Issue Open Date***

* A calendar shall be provided to enter Issue open date.

***Requirement 8: Issue Created by***

* Issue created by field shall be defaulted to a resource logged in.

***Requirement 9: Issue Closure target date***

* A calendar shall be provided to choose Issue closure target date.

***Requirement 10: Issue Completed date***

* A calendar shall be provided to choose Issue completed date.

***Requirement 11: Issue Completion Status***

* Issue completion status shall be displayed by bubbles with colors like Yellow, Green and Red.
* Red color status indicates that issue completion exceeded target date and is still open.
* Light Green color status indicates that issue has been completed within the target date.
* Dark Green status indicates that an issue has been completed after the target date.
* Yellow status indicates that issue completion is in progress and within the target date.

***Requirement 12: Issue Response***

* A text area shall be provided to enter issue response by management resource only.
* Date stamp shall be provided for issue response.

***Requirement 13: Alerts for Open Issues***

* Alerts for Open Issues shall be sent to issue created person, Project Manager/s and Corrective action responsible person/s.
* Alerts shall be sent before 3 weeks, 2 weeks and 1 week before the target completion date.
* Issue creating person and the Project Manager/s should have the ability to stop any or all of the three alerts from being sent.

***Requirement 14: Issue Tracking Report 1***

* Issue Tracking Report shall have all Issues listed.

***Requirement 15: Issue Tracking Aging Report***

* Issue Tracking Aging Report shall be provided with as of date feature.

***Note: Nice to have feature***

***Dashboard for issue tracking status.***