Contract Management – Document Drafting Tool

Business Requirement Document

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exela
TECHNOLOGIES

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1.1.   Document and Control History

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Revision History

Date	Revision	Section/ Page Number	Summary of Changes	Author

1.2.   Product Summary

Documents form the integral part of contract management product. The Contract drafting tool enables user to create any type of contract by selecting the required template from the library. On the few set of click user can create a contract document and set if for further processing. User can add extra template into the library, if the required template is not available in standard library.

1.3.   Objective

The objective of this document is to define the business requirements Contract providing a basis for creating the product backlog for the development teams. All requirements should be reflected here, changes or enhancement made during the agile development process will be added to this document.

2. Product High Level Scope

2.1. Template library / corporate library

Template library consists of the set of per defined template.

2.2. Category listing

The templates are listed under respective categories viz. legal, Compliance etc.

2.3. Add Template under defined category

User can add the template under predefined categories.

2.4. Create Category

User can create a category and add templates as per specific business requirement.

2.5. Create Contract

User can create a contract by selecting a standard which will open in creator window where he can input the required data and create contract.

2.5.1. User Profiles and Business Roles

- Client Admin
    - Download templates from template library
    - Add template to work flow library
    - Create Category for the template
    - Create contract document
    - Provide category accesses to client user depending upon the usage
    - Define user roles
- Client User
    - Download template from template library which access has been provided by client admin
    - Add templates under the accessible category
    - Create a contract document

3. Drafting feature:

The user can create a contract using drafting feature. The selected template will open in a window where user can make all the required changes and save it for the future action.

4. Business Requirements

4.1. Template Library

User Story Id	As a/an	I want	So That	Acceptance Criteria
DO US 001	Client admin	I want view the set of templates available in library	I can use to create a contract	1. I need to click on specific category box 2. On click I can all the templates under that category 3. When I click on specific template it will open in read mode where I can view the content but cannot edit
DO US 002	Client admin	To new category of template	I can add the templates that are not available in current library	1. I have to click on + button which will open a pop up window where I need to add the category name and Save 2. I can select an icon for a category by clicking on search icon button under the pop up 3. The click on save button will add the category in library
CM-CD US DO US 003	Client admin	To add template under existing/new categories	I can use add template which does not exist in current library	1. I have to click on the category 2. I have to click on add template button 3. I can add the templates from the local drive, google shared drive, Dropbox etc. 4. I can add the file in pdf, word or any other editable format 5. Once the document is imported system I should be able to view the document in editable mode while I am creating a contract using this template 6. A newly added template will be updates in the corporate template library
CM-CD US 004	Client Admin	To provide category /categories access of template library to the user	User can only access and add template in their respective category	1. I have to select the category and from the drop down list I have to assign users to that category

Commented [SB2]: want to view

Commented [SB3]: I can view all the templates

Commented [SB4]: Add new category of template

Commented [SB5]: I can add the Category that is not available in current library

Commented [SB6]: Not clear with this point

User Story Id	As a/an	I want	So That	Acceptance Criteria
				2. Multiple users can be assigned for the single category
				3. All the selected user will have an access to add the templates under accessible category
				4. I can disable users access to add the template
				5. I need not approve users action of adding template
CM-CD-US 005	Client User	Add the template to the accessible category	I can add the required template	1. I can add the template to the category whose access has been provided to me by client admin
				2. I have to click on the category
				3. I have to click on add template button
				4. I can add the templates from the local drive, google shared drive, Dropbox etc.
				5. I can add the file in pdf, word or any other editable format
				6. Once the document is imported system I should be able to view the document in editable mode while I am creating a contract using this template
				7. A newly added template will be updates in the corporate template library
CM-CD US 006	Client Admin	Create contract using templates	I can fulfil me contract requirement	8. I can select any template for any category form the template library
				9. The template will open in an edit more where I can make the required changes and save for future action

4.2. Create Contract

User Story Id	As a/an	I want	So That	Acceptance Criteria
CM-CD US 007	Client admin	Create a contract	I can create contract as per my requirement	1. Under template library I have to click on the category
				2. I need to select the template
				3. The selected template will open in an edit mode where I can make the necessary changes and save it for the further action

Commented [SB7]: CM_CD US 006 and CM_CD US 007 both are same

User Story Id	As a/an	I want	So That	Acceptance Criteria
CM-CD US 008	Client User	Create a contract	I can create contract as per my requirement	1. I can select the template from the template category I have access 2. I have to select the template 3. The selected template will open in an edit mode where I can make the necessary changes and save it for the further action

4.3. Contract Management Plugin:

User Story Id	As a/an	I want	So That	Acceptance Criteria
CM-CD US 009	Client admin/user	Create a contract	I can select the required template for creating contract	1. I have to click on the + icon form where system will ask me to create a contract using drafting tool 2. The drafting tool application will open and I need to follow the rest of the standard processes 3. Once the contract drafting is done I can route the contract through various approval and signing process using predefined workflow (BEATS) 4. As per the statuses the contracts will be displayed on the dashboard

4.4. BEATS Integration with Drafting Tool: