BUSINESS REQUIREMENT DOCUMENT

Project Name:

Client: Choksi Lab (Indore)
Service Provider: indices Systems & Technologies Pvt. Ltd. (Indore)
Date:
Prepared By: Business Development Head, iDice Systems

Feature/Module	Description
User Authentication	Role-based access: Admin, Manager, and Operator.
Document Creation Module	Templates for agreements and tenders; fillable forms for standardised inputs.
Customer Requirement Form	Customers can submit basic requirement details via ChoksiLab.in.
Review & Approval Workflow	Multi-level review and approval with digital signatures.
Document Management	Secure storage, retrieval, version control, and history tracking.
Notifications & Reminders	Automated alerts for pending reviews, approvals, or approaching deadlines.
Reporting Module	Generate reports for ongoing, completed, or pending tenders/agreements.
Audit Log	Track user activities (creation, modification, approvals, etc.).

1. Purpose and Objective :

The purpose of this BRD is to outline the development of an automated software solution to streamline and manage for Choksi Lab.
The software will address existing challenges by enhancing efficiency, reducing errors, and ensuring document security with version Control.

2. Project Scope :

2.1 In-Scope

- Design and development.
- Process automation for creating, reviewing, and approving Audit/agreement/other documents.
- Integration with existing tools (if required).
- Custom reporting and document tracking capabilities.
- Notifications and alerts for pending tasks or approvals.

3. Key Functional Requirements

STEP (1) Customer Requirement Submission :

- Users/customers will visit the Choksi Lab website (*ChoksiLab.in*).
- A dedicated form will be available on the website where customers can fill in the following basic details of their requirements:
  - Name
  - Contact Details (Phone Number/Email)
  - Description of the Requirement (Brief details about their needs)
- Upon submission, the form data will be saved securely in the backend database for further processing.

STEP (2) Form Retrieval and Lead Generation :

- The form saved in the database will be accessible from the Admin Dashboard.
- **Lead Generation**: Based on the form details, a new lead will be generated in the system.
- **Admin Input**: The admin will fill up the rest of the details in the form available on the admin side only.
- **Credential Creation**: The admin will generate an ID and Password to secure the document.
- **Sharing with Client**: The Admin will share the form with the generated credentials (ID and Password) to the client for secure access to the document.

STEP (3) Document Initiation and Review :

- Operator retrieves the form data from the backend database.
- Based on customer requirements, the operator creates a new document.
- Standardised templates will be available for inputs.

Step (4) Internal Review

- Document submitted for review to the Manager / Sub admin.
- Manager verifies details and suggests edits if needed.
- After successful review the documentation will be shared with client for their approval

Step (5) Document Review by Client :

- On the basis of the created document shared with the client:
  - The client will review the document to verify that it matches their requirements.
  - Once the client confirms the document is correct and agrees to proceed, the system will allow for the creation of a detailed quotation.

- **After Review by client this process will pass to the system user who will create a detailed quotation.(Who will be that person/define a role)**

Step (6) Quotation Creation :

- The quotation will be generated using a template-based system and will include the following details:
  - Cost
  - Time
  - Services Offered by Us

- The quotation will be saved in the database with version control to ensure all revisions are maintained.

Step (7) Client Approval/Rejection of Quotation

- Once the quotation is shared with the client, two options will be available:

1. **Approve**: If the client is satisfied with all the details included in the quotation, they will approve it.

2. **Reject**: If the client is not satisfied, they can reject the quotation.
   - **Reason for Rejection**: A text box will be available for the client to provide the reason behind the rejection.

- **New Quotation Creation**: Upon receiving the rejection reason, the admin will revise the quotation as per the client's feedback and share a new version of the quotation until client approval is received.
- **Selected quotation will save as final quotation or approved quotation on client records**

Step (8) Agreement Signing :

After the quotation is finalised and approved by the client:

1. An **agreement or contract** will be created and shared with both parties (ChoksiLab Admin and Client).
2. Both parties will **digitally sign** the agreement.
3. A copy of the digitally signed agreement will be saved securely in the system and made accessible to both parties for record-keeping purposes.
4. The signed agreement (Signed by Auditor or authorize person of Choksi Lab) will be called as **Sign of Consent***

   [Sign of Consent – This is a document which also need to be save for future reference]

Step (9) Auditor Selection :

- Auditor will assign by admin from available Auditor list

Step (10) Audit Plan Scheduling :

1. After the agreement is signed and finalised, the Auditor of ChoksiLab will create an Audit Plan for the visit to the client's site.

- The **Audit Plan** will include:
  - Date and Time of the audit.
  - Selection of one or multiple auditors based on client requirements

- Clients will also have the option to propose their preferred date and time for the audit process.
- Once the **mutually agreed date and time** is finalised by both the Auditor(s) and the Client, the audit will be officially scheduled in the system.
- The audit details (Date, Time, Assigned Auditors, and Confirmation Status) will be saved in the database for tracking and reporting purposes.

Inventory Assignment: Inventory or tools required for the audit process will be assigned to the auditor(s) by the relevant authority based on the audit requirements. These details will also be saved in the database for tracking and management.

Step(11) Audit Initiation :

The audit process will commence as per the scheduled timeline.

1. **Audit Completion and Review**
   - After completing the audit process, the auditor will perform a detailed review of the findings.
   - The auditor will verify all necessary details to finalise the audit report.

2. **Sharing Audit Details**
   - The finalised audit details, including the parameters and basis of the audit, will be shared with the client.
   - These audit details will be stored in the database as a versioned record for reference.

3. **NC Form attached with audit report**

- Along with the audit report, an NC form will be generated and shared with the client.
- The NC form will also be displayed on the client's dashboard for review.

4. **Client Review and Approval**

    - The client will review the audit details and the NC form on their dashboard.
    - If the client is satisfied with the audit process and findings, they will digitally sign the NC form.
    - The signed form will include all required details for record-keeping and compliance purposes.

5. **Database Storage**

    - All signed forms and relevant audit details will be saved in the database for future reference.

Step (12) Certificate of Inspection or Audit Completion Certificate :

- After receiving the NC form from the client, the process to provide the inspection certificate will commence.
- The inspection certificate will be shared with the client via email.
- The certificate will also be saved in the database for future reference.

Technical Requirements

Aspect	Details
Technology Stack	Angular/Node/Laravel
Hosting	Cloud-based (AWS/Azure) or On-Premise/Shared Hosting
Database	SQL/MySQL/PostgreSQL.
Security	Role-based access, encryption, and audit logs.
Scalability	Designed to accommodate future modules.

Timeline and Milestones

Milestone	Timeline
Requirement Gathering	
Design Phase	
Development Phase	
Testing & UAT	
Go-Live	

Approval

Name	Designation	Signature
Choksi Lab Representative		
Idice Systems & Technologies Representative		

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