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# Sales Assessment Tool: SRS

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OpenEyes Technologies, Inc.

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## Document History

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## Purpose of Document

A sales assessment for recommend training is conducted ultimately to identify what areas of knowledge or behaviors that training needs to accomplish. The analysis considers what results the organization needs from the learner, what knowledge and skills the learner presently has and usually concludes with identifying what knowledge and skills the learner must gain by taking recommended training courses.

The purpose of the document is to collect and analyze all assorted ideas that have come up to define the system, its requirements with respect to end users. Also, we shall predict and sort out how we hope this product will be used to gain a better understanding of the project, outline concepts that may be developed later, and document ideas that are being considered, but may be discarded as the product develops.

In short, the purpose of this Software Requirement Specification (SRS) document is to provide a detailed overview of this product, its parameters and goals. This document describes the tools' target audience and its user interface, hardware and software requirements. It defines how team and audience see the tool and its functionality. Nonetheless, it helps any designer and developer to assist in software delivery lifecycle (SDLC) processes.

## Scope of this Guide

This is a list of the people or role involved in the process.

- ❖ Actual Users
  - Management of a corporation or client of AFP
- ❖ Business Team
  - Business leader for Association for Financial Professionals
- ❖ Sales Team
  - Sales associate for Association for Financial Professionals
- ❖ IT Team
  - OpenEyes Technologies Inc.

## Specific Requirements

On a very high level, the online Sales Assessment Tool will perform the following tasks:

- ❖ User & Company Registration
- ❖ User Profiling
- ❖ List of past Assessments via dashboard
- ❖ New Assessment
- ❖ Preliminary result
- ❖ Administration of the site
- ❖ Reports

### 1. New Registration

Corporation wish to assess their team require to register online within the application. Registration is free however invitation is required to register. Invitation can be send by Sales users and/or administrator of the tool.

#### 1.1 Company registration

- 1.1.1 A user shall either select a company from the existing list or can register their company with the following information:
- Invitation code
    - Mandatory only if the invitation feature is enable otherwise optional. User should be invited to get registered.
  - Name
    - Mandatory. Maximum 100 characters in length. Should allow Alpha-Numeric characters. Only special characters allowed are Space ( ), Dot (.), comma (,) and Dash (-)
  - Industry
    - Mandatory. Either can be a selection or a free text if no industry found in pre-define list.
  - Website
    - Mandatory. Maximum 250 characters in length. Should only allow industry standard web address format, with or without "http://".
  - Phone number
    - Mandatory. Maximum 13 characters in length. Should allow Alpha-Numeric characters. Only special characters allowed are Space ( ), Dot (.), Parenthesis ( ( ) ) and Dash (-).
- 1.1.2 If user select to register a new company and if the company is already existing, user will be prompted with the warning and suggestion to select the existing company instead.
- 1.1.3 Duplicate company registration is not allowed. Duplicity will be determined based on the combination of company name and website address.

- 1.1.4 Post-company registration, only site (AFP) administrator can modify company related information.
- 1.1.5 An email notification will be send to the user upon successful company registration.
- 1.1.6 User will be navigated to the second sub-step of registration – User registration.

## 1.2 User Registration

- 1.2.1 Once the company registration complete, user can be registered with the following personal information:

- First Name
  - Mandatory. Maximum 100 characters in length. Should allow Alphabets. Only special characters allowed are Space ( ) and single quote (').
- Last Name
  - Mandatory. Maximum 100 characters in length. Should allow Alphabets. Only special characters allowed are Space ( ) and Single quote (').
- Title
  - Mandatory. Maximum 100 characters in length. Should allow Alphabets. Only special characters allowed are Space ( ), Comma (,), and Dash (-).
- Email address
  - Mandatory. Maximum 250 characters in length. Should only allow industry standard email address format.
- Password
  - Mandatory. Minimum 8 and maximum 50 characters in length. Should allow Alpha-Numeric characters. Only special characters allowed are at the rate (@), Underscore (\_), Dash (-), Dollar (\$), Star (\*), Ampersand (&), Exclamation mark (!), and Hash (#).
- Confirm Password
  - Mandatory. Should be the same as “Password” field.
- Address 1
  - Mandatory. Maximum 250 characters in length. No restriction on character selection.
- Address 2
  - Optional. Maximum 250 characters in length. No restriction on character selection.
- Country
  - Mandatory. Selection from existing list. United States should be the first option in the dropdown.
- City
  - Mandatory. Maximum 100 characters in length. Should only allow alphabets. Only special characters allowed are Space ( ) & Single quote ( ' ).
- State
  - Mandatory. Selection from existing list based on the country selection from country dropdown. Only US & Canadian states/provinces are available. For rest of the countries, a text box will be provided. For the free entry textbox, maximum 50



characters in length allowed. Should only allow Alphabets. Only special characters allowed is Space ( ).

- Zip code
    - Mandatory. Maximum 8 characters in length. Should allow only numeric characters. No special characters allowed.
  - Phone number
    - Mandatory. Maximum 13 characters in length. Should allow Alpha-Numeric characters. Only special characters allowed are Space ( ), Dot (.), Parenthesis ( ( ) ) and Dash (-).
- 1.2.2 A warning message will be pop up if the user is already registered with the entered email address suggesting using “Forgot Password” feature.
- 1.2.3 An email notification will be send to user upon successful registration.
- 1.2.4 User will be navigated to the login page upon successful registration.

## 2. Forgot Password

- 2.1 A mandatory email address with an industry standard format require for a user to utilize this feature.
- 2.2 Mandatory field. Maximum 250 characters can be entered.
- 2.3 In case of no user record found, a warning message will pop up with the suggestion to register as a new user.
- 2.4 If a user’s record found for the entered email address, a link to reset the password will be emailed to the user on the provided email address.
- 2.5 User navigates to reset password page by clicking the link provided into their mail box.
- 2.6 User will be navigated to login page with the message saying email has been sent.

## 3. Reset Password

- 3.1 User can reset the password by providing following information:
- Password
    - Mandatory. Minimum 8 and maximum 50 characters in length. Should allow Alpha-Numeric characters. Only special characters allowed are at the rate (@), Underscore (\_), Dash (-), Dollar (\$), Star (\*), Ampersand (&), Exclamation mark (!) and hash (#).
  - Confirm Password
    - Mandatory. Should be the same as “Password” field.
- 3.2 User cannot use the last password.
- 3.3 An email notification will be send to user upon successful reset.
- 3.4 User will be redirect to the login page with the successful reset message.

## 4. Login

4.1 User can use:

- Email address
  - Mandatory. User shall use the email address they have used at the time of registration.
- Password
  - Mandatory. User shall use the password they have set with their account.

4.2 If a user record found, user will be redirected to their dashboard.

4.3 If a user record cannot be found, user will stay at the same with the warning message of record not found suggesting registering as a new user or use forgot password to reset the password.

4.4 No user lock feature is available.

## 5. Dashboard

5.1 Each user has its own dashboard.

5.2 Dashboard will act as a landing page upon successful login.

5.3 Dashboard lists all the past assessments with minimal information about each assessment.

5.4 A user can navigate to the past assessments and can view the assessment report with very high-level information.

5.5 A user can take a new assessment from the dashboard.

5.6 Features on the dashboard will be available based on the user's role:

### 5.7 Role based dashboard features

5.7.1 Each new registered user will be assigned a role of "General User"

5.7.2 With the "General user" role, a user can:

- Take a new assessment
- Review the past assessments
- Modify their own profile

5.7.3 With the "Sales" role, a user can:

- Review the past assessments from all users
- Modify their own profile
- Generate lead by reviewing assessments
- Generate role base reports mentioned in the reports section
- Assessment search by company
- Assessment search by a user's first name and/or last name

5.7.4 With the "Admin" role, a user can:

- Review the past assessments from all users
- Modify their own profile
- Generate lead by reviewing assessments
- Generate role base reports mentioned in the reports section
- Administration of the website like

- Assessment management
- Domain management
- Competencies management
- KSAs management
- User management
- Company management
- Industry management

5.7.5 With the “IT” role, a user can:

- Review the past assessments from all users
- Modify their own profile
- Generate lead by reviewing assessments
- Generate role base reports mentioned in the reports section
- Administration of the website like
  - Assessment management
  - Domain management
  - Competencies management
  - KSAs management
  - User management
  - Company management
  - Adding new reports
  - Adding new features
  - Data consolidation
  - Data integration
  - Data migration and analysis

## 6. Assessment

- 6.1 Only an active user should be able to take an assessment
- 6.2 Assessment will be conducted for all 6 domains.
- 6.3 All competency areas will be covered in the assessment.
- 6.4 Assessment will consist of 50 random KSAs.
- 6.5 KSAs (Knowledge, Skills and Areas) will be randomly appear from the KSA bank for each assessment.
- 6.6 During the assessments, a user will not be aware of which KSAs are belongs to which competency area or domain
- 6.7 A user can be begun the assessment with the following information:
  - Name
    - Mandatory. Maximum 100 characters in length. Should allow Alpha-Numeric. Only special characters allowed are Space ( ), Underscore ( \_ ), Dash ( - ), Ampersand ( & ), and Hash ( # )
  - Team Size

- Mandatory. Selection from pre-existing list.
- Description
  - Optional. Maximum 2500 characters in length.

## 6.8 KSA rating scales

6.8.1 A user will have 4 choices to select their rating based on the following scales:

- General Awareness
  - Detect, identify, bring to someone else's attention
- Developing
  - Partially analyze, estimate, perform under supervision
- Intermediate
  - Understand and discuss the application and implication of changes to processes, policies, and procedures
- Advanced
  - Fully analyze, resolve, perform independently

6.9 Assessment will not be time restricted.

6.10 A user will be able to navigate back and forth to any KSAs appeared in their assessments.

6.11 A progress bar will be appearing incrementally as the assessment progresses.

6.12 Before submission, user will have a way to verify all answers for each of the KSAs.

6.13 User will have option to navigate to any KSAs and change their answer if the assessment has not been submitted.

6.14 All KSAs are mandatory to answer. Without answering all, submission cannot be permitted.

6.15 User will be prompted to confirm the submission of the assessment.

6.16 Upon submission, user will be redirected to the thank you page instructing them about the next step(s).

6.17 An email will be send out to “Sales representatives” as soon as a user will complete and submit their assessment.

6.18 A separate email will be send out to the individual user who just completed the assessment thanking and instructing them about the next step(s).

## 6.19 Result screen

6.19.1 Instruction for the next steps will be available for the user.

6.19.2 User will get a high level of result in the form of bar chart showing average score per domain.

6.19.3 User have a way to navigate to the dashboard where newly submitted assessment will be appeared.

## 7. Past Assessments

7.1 All users will be able to view the past assessments.

### 7.2 User based past assessments view

#### 7.2.1 General User

7.2.1.1 A general user will be able to see the result of their past assessment.

7.2.1.2 The result page consists of two data representations:

- Tabular format
  - Total number of KSAs covered
  - % of KSAs covered in each domain
  - % of KSAs covered in each competency area
  - % of KSAs assessed for each rating scale
  - Total time taken
- Chart format
  - A pie chart showing % of KSAs covered in each domain
  - A pie chart showing % of KSAs covered in each competency area
  - A line chart showing in %, total number of KSAs covered by each rating scale

#### 7.2.2 Sales User

7.2.2.1 A Sales user will be able to see the result of any General user's all past assessment.

7.2.2.2 A special alphabet search bar will be available for Sales user to navigate to any general user whose name starts with that alphabet.

7.2.2.3 Upon selection of a user, the result page for that user consisting following data representations:

- Tabular format
  - Total number of KSAs covered
  - % of KSAs covered in each domain
  - % of KSAs covered in each competency area
  - % of KSAs assessed for each rating scale
  - Total time taken
- Chart format
  - A pie chart showing % of KSAs covered in each domain

- A pie chart showing % of KSAs covered in each competency area
  - A line chart showing in %, total number of KSAs covered by each rating scale
  - Detail format
    - This format showing all KSAs and the selected rating scales for each KSAs for selected assessment for selected general user.
    - Based on the selected rating scales, Sales person will be able to see suggested courses for the user
- 7.2.2.4 Based on the result, set of recommended courses will be available for sales person to discuss with the general user.
- 7.2.2.5 Course will be divided into two categories:
- Current scale level
  - Next scale level

## 7.2.2 Admin User

- 7.2.2.1 An admin user will be able to see the result of any General user's all past assessment.
- 7.2.2.2 A special alphabet search bar will be available for admin user to navigate to any general user whose name starts with that alphabet.
- 7.2.2.3 Upon selection of a user, the result page for that user consisting following data representations:
- Tabular format
    - Total number of KSAs covered
    - % of KSAs covered in each domain
    - % of KSAs covered in each competency area
    - % of KSAs assessed for each rating scale
    - Total time taken
  - Chart format
    - A pie chart showing % of KSAs covered in each domain
    - A pie chart showing % of KSAs covered in each competency area
    - A line chart showing in %, total number of KSAs covered by each rating scale
    - A line chart showing in number, total number of KSAs covered by each rating scale
  - Detail format
    - This format showing all KSAs and the selected rating scales for each KSAs for selected assessment for selected general user.
    - Based on the selected rating scales, admin person will be able to see suggested courses for the user

## 8. Administration of the tool

8.1 Only admin user will be able to access this section of the tool

### 8.2 User Management

#### 8.2.1 Inviting a user

8.2.1.1 Sales person and administrators can invite a user to assess

8.2.1.2 Following conditions are required for inviting a user

- Email address
  - Mandatory. Maximum 250 characters in length. Should only allow industry standard email address format.

8.2.1.3 Upon successful invitation, an email will be sent out to the general user about the invitation

8.2.1.4 Upon successful modification, a message will appear on the screen suggesting the invitation has been sent.

8.2.1.5 Upon unsuccessful modification, an error or exception message will appear on the screen suggesting the outcome.

8.2.1.6 An invitation can be resent with one click option if the user has not accepted the invitation and registered yet.

#### 8.2.2 Adding a new user

8.2.2.1 A new user cannot be added through the admin section of the tool

#### 8.2.3 Modifying user data

8.2.3.1 An admin can modify any data for a user with the following conditions:

- First Name
  - Mandatory. Maximum 100 characters in length. Should allow Alphabets. Only special characters allowed are Space ( ) and single quote (').
- Last Name
  - Mandatory. Maximum 100 characters in length. Should allow Alphabets. Only special characters allowed are Space ( ) and Single quote (').
- Title
  - Mandatory. Maximum 100 characters in length. Should allow Alphabets. Only special characters allowed are Space ( ), Comma (,), and Dash (-).
- Email address
  - Mandatory. Maximum 250 characters in length. Should only allow industry standard email address format.
- Password

- Mandatory. Minimum 8 and maximum 50 characters in length. Should allow Alpha-Numeric characters. Only special characters allowed are at the rate (@), Underscore (\_), Dash (-), Dollar (\$), Star (\*), Ampersand (&), Exclamation mark (!), and Hash (#).
- Confirm Password
  - Mandatory. Should be the same as “Password” field.
- Address 1
  - Mandatory. Maximum 250 characters in length. No restriction on character selection.
- Address 2
  - Optional. Maximum 250 characters in length. No restriction on character selection.
- Country
  - Mandatory. Selection from existing list. United States should be the first option in the dropdown.
- City
  - Mandatory. Maximum 100 characters in length. Should only allow alphabets. Only special characters allowed are Space ( ) & Single quote ( ' ).
- State
  - Mandatory. Selection from existing list based on the country selection from country dropdown. Only US & Canadian states/provinces are available. For rest of the countries, a text box will be provided. For the free entry textbox, maximum 50 characters in length allowed. Should only allow Alphabets. Only special characters allowed is Space ( ).
- Zip code
  - Mandatory. Maximum 8 characters in length. Should allow only numeric characters. No special characters allowed.
- Phone number
  - Mandatory. Maximum 13 characters in length. Should allow Alpha-Numeric characters. Only special characters allowed are Space ( ), Dot (.), Parenthesis ( ( ) ) and Dash (-).

8.2.3.2 Admin user will be prompted before submitting the changes.

8.2.3.3 Upon successful modification, an email will be send out to the general user about the modification

8.2.3.4 Upon successful modification, a message will appear on the screen suggesting the outcome.

8.2.3.5 Upon unsuccessful modification, an error or exception message will appear on the screen suggesting the outcome.

## 8.2.4 Reset User's Password

8.2.4.1 Admin can rest password for any user in the system by providing following information:

- Password
  - Mandatory. Minimum 8 and maximum 50 characters in length. Should allow Alpha-Numeric characters. Only special characters allowed are at the rate (@), Underscore (\_), Dash (-), Dollar (\$), Star (\*), Ampersand (&), Exclamation mark (!) and hash (#).
- Confirm Password



- Mandatory. Should be the same as “Password” field.
- 8.2.4.2 User cannot use the last password.
- 8.2.4.3 Upon successful modification, an email will be send out to the general user about the modification
- 8.2.4.4 Upon successful modification, a message will appear on the screen suggesting the outcome.
- 8.2.4.5 Upon unsuccessful modification, an error or exception message will appear on the screen suggesting the outcome.

### 8.2.5 De(re)activating a user

- 8.2.5.1 Admin can deactivate a user with one-click solution from the list of users.
- 8.2.5.2 A warning message will pop up before changes will be committed.
- 8.2.5.3 Upon successful modification, a message will appear on the screen suggesting the outcome.
- 8.2.5.4 Upon unsuccessful modification, an error or exception message will appear on the screen suggesting the outcome.

### 8.2.6 Assign role to a user

- 8.2.6.1 Admin can assign a role to a user.
- 8.2.6.2 User must be active user to get a new role.
- 8.2.6.3 Admin can assign one of the following roles to any user into the tool:
  - Administrator of the site
  - Sales person of AFP
  - General user
- 8.2.6.4 A warning message will pop up before changes will be committed.
- 8.2.6.5 Upon successful modification, an email will be send out to the user about the role assignment.
- 8.2.6.6 Upon successful modification, a message will appear on the screen suggesting the outcome.
- 8.2.6.7 Upon unsuccessful modification, an error or exception message will appear on the screen suggesting the outcome.

## 8.3 Domain management

### 8.3.1 Adding a new domain

- 8.3.1.1 A domain can be added with the following conditions:
  - Name
    - Mandatory. Maximum 100 characters in length. Should allow Alphabets. Only special characters allowed are Space ( ).
- 8.3.1.2 Newly added domain will not be considered into assessment till at least one KSA link with it.

### 8.3.2 Modifying a domain

8.3.2.1 An admin can modify domain name with the following conditions:

- Name
  - Mandatory. Maximum 100 characters in length. Should allow Alphabets. Only special characters allowed are Space ( ).

### 8.3.3 De(re)activating a domain

8.3.3.1 Deactivating a domain will only be possible if there is no progressive assessment is going on.

8.3.3.2 A warning message will pop up before changes will be committed.

8.3.3.3 Upon successful modification, a message will appear on the screen suggesting the outcome.

8.3.3.4 Upon unsuccessful modification, an error or exception message will appear on the screen suggesting the outcome.

8.3.3.5 KSAs from a deactivated domain will not be considered in the assessment.

### 8.3.4 Deleting a domain

8.3.4.1 A domain can only be deleted if there is no competency area or KSAs are assigned.

8.3.4.2 A warning message will pop up before changes will be committed.

8.3.4.3 Upon successful modification, a message will appear on the screen suggesting the outcome.

8.3.4.4 Upon unsuccessful modification, an error or exception message will appear on the screen suggesting the outcome.

## 8.4 Competency area management

### 8.4.1 Adding a new competency area

8.4.1.1 A competency area can be added with the following conditions:

- Name
  - Mandatory. Maximum 100 characters in length. Should allow Alphabets. Only special characters allowed are Space ( ) and forward slash (/).
- Description
  - Mandatory. Maximum characters allowed per MySQL limitation. Should allow any characters. This will be using WYSIWYG editor.
- Key Concepts
  - Mandatory. Maximum characters allowed per MySQL limitation. Should allow any characters.
- Domain
  - Mandatory. Select a domain from pre-define list of domains

8.4.1.2 A newly added competency area will not be considered into assessment will at least one KSA link to it.

## **8.4.2 Modifying a competency area**

8.4.2.1 An admin can modify a competency name with the following conditions:

- Name
  - Mandatory. Maximum 100 characters in length. Should allow Alphabets. Only special characters allowed are Space ( ) and forward slash (/).
- Description
  - Mandatory. Maximum characters allowed per MySQL limitation. Should allow any characters. This will be using WYSIWYG editor.
- Key Concepts
  - Mandatory. Maximum characters allowed per MySQL limitation. Should allow any characters.
- Domain
  - This field cannot be change if at least one KSA is link to this competency area.

## **8.4.3 De(re)activating a competency area**

8.4.3.1 Deactivating a competency area will only be possible if there is no progressive assessment is going on.

8.4.3.2 A warning message will pop up before changes will be committed.

8.4.3.3 Upon successful modification, a message will appear on the screen suggesting the outcome.

8.4.3.4 Upon unsuccessful modification, an error or exception message will appear on the screen suggesting the outcome.

8.4.3.5 KSAs from a deactivated competency area will not be considered in the assessment.

## **8.4.4 Deleting a competency area**

8.4.4.1 A competency area can only be deleted if there is no KSAs are assigned.

8.4.4.2 A warning message will pop up before changes will be committed.

8.4.4.3 Upon successful modification, a message will appear on the screen suggesting the outcome.

8.4.4.4 Upon unsuccessful modification, an error or exception message will appear on the screen suggesting the outcome.

## 8.5 KSA management

### 8.5.1 Adding a new KSA

8.5.1.1 A KSA can be added with the following conditions:

- Name
  - Mandatory. Maximum 500 characters in length. Should allow Alpha-Numeric. Only special characters allowed are Space ( ), forward slash (/), single quote ('), double quote ("), comma (,), semi-colon (;), dash (-), dot (.), parenthesis ( ( & ) ), ampersand (&) and question mark (?).
- Competency area
  - Mandatory. Select a competency area from pre-define list of areas
- Rating Scale
  - Default 4 scales will be assigned.

8.5.1.2 By default, a newly added KSA is activated right away.

### 8.5.2 Modifying a KSA

8.5.2.1 An admin can modify a KSA with the following conditions:

- Name
  - Mandatory. Maximum 500 characters in length. Should allow Alpha-Numeric. Only special characters allowed are Space ( ), forward slash (/), single quote ('), double quote ("), comma (,), semi-colon (;), dash (-), dot (.), parenthesis ( ( & ) ), ampersand (&) and question mark (?).
- Competency area
  - Mandatory. Cannot be modifiable if at least one past assessment is completed or at least one assessment is ongoing.

8.5.2.2 Modified name will be reflected right away into ongoing assessments or into past assessments.

### 8.5.3 De(re)activating a KSA

8.5.3.1 Deactivating a KSA will only be possible if there is no progressive assessment is going on.

8.5.3.2 A warning message will pop up before changes will be committed.

8.5.3.3 Upon successful modification, a message will appear on the screen suggesting the outcome.

8.5.3.4 Upon unsuccessful modification, an error or exception message will appear on the screen suggesting the outcome.

8.5.3.5 A deactivated KSAs will not be considered in the assessment.

8.5.3.6 Past assessment will not be affected by this change.

### 8.5.4 Deleting a KSA

8.5.4.1 A KSA can only be deleted if it is never being used!

8.5.4.2 A warning message will pop up before changes will be committed.

8.5.4.3 Upon successful modification, a message will appear on the screen suggesting the outcome.

8.5.4.4 Upon unsuccessful modification, an error or exception message will appear on the screen suggesting the outcome.

## 8.6 Course management

### 8.6.1 Adding a course

8.6.1.1 A course can be added with the following conditions:

- Name
  - Mandatory. Maximum 250 characters in length. Should allow Alpha-Numeric. Only special characters allowed are Space ( ), forward slash (/), single quote ('), double quote ("), comma (,), semi-colon (;), colon (:), dash (-), dot (.), parenthesis ( ( & ) ), ampersand (&) and question mark (?).
- Level
  - Mandatory. Select a level from pre-define list of levels having values (Foundational, Intermediate and Advanced)
- Key Concepts
  - Mandatory. Maximum characters allowed per MySQL limitation. Should allow any characters.

### 8.6.2 Modifying a course

8.6.2.1 An admin can modify a course with the following conditions:

- Name
  - Mandatory. Maximum 250 characters in length. Should allow Alpha-Numeric. Should allow Alpha-Numeric. Only special characters allowed are Space ( ), forward slash (/), single quote ('), double quote ("), comma (,), semi-colon (;), colon (:), dash (-), dot (.), parenthesis ( ( & ) ), ampersand (&) and question mark (?).
- Level
  - Mandatory. Select a level from pre-define list of levels having values (Foundational, Intermediate and Advanced)
- Key Concepts
  - Mandatory. Maximum characters allowed per MySQL limitation. Should allow any characters.

### 8.6.3 De(re)activating a course

8.6.3.1 A warning message will pop up before changes will be committed.

8.6.3.2 Upon successful modification, a message will appear on the screen suggesting the outcome.

- 8.6.3.3 Upon unsuccessful modification, an error or exception message will appear on the screen suggesting the outcome.
- 8.6.3.4 Deactivating a course will not have any effect on the past assessment however the course will show up as “No longer supporting!”.

## 8.7 Industry management

### 8.7.1 Adding an industry

8.7.1.1 An industry for company registration can be added with the following condition:

- Name
  - Mandatory. Maximum 250 characters in length. Should allow Alpha-Numeric. Only special characters allowed are Space ( ), forward slash (/), single quote ('), double quote ("), comma (,), semi-colon (;), colon (:), dash (-), dot (.), parenthesis ( ( & ) ), ampersand (&) and question mark (?).

### 8.7.2 Modifying an industry

8.7.2.1 Only an AFP admin can modify an industry with the following conditions:

- Name
  - Mandatory. Maximum 250 characters in length. Should allow Alpha-Numeric. Should allow Alpha-Numeric. Only special characters allowed are Space ( ), forward slash (/), single quote ('), double quote ("), comma (,), semi-colon (;), colon (:), dash (-), dot (.), parenthesis ( ( & ) ), ampersand (&) and question mark (?).

### 8.7.3 De(re)activating an industry

- 8.7.3.1 A warning message will pop up before changes will be committed.
- 8.7.3.2 Upon successful modification, a message will appear on the screen suggesting the outcome.
- 8.7.3.3 Upon unsuccessful modification, an error or exception message will appear on the screen suggesting the outcome.
- 8.7.3.4 Deactivating an industry will not have any effect on the past registrations however the industry will show up as “No longer supporting!” under admin section of the tool.

### 8.7.4 Deleting an industry

8.7.4.1 An industry can only be deleted if no company have been registered with this industry.

8.7.4.2 A warning message will pop up before changes will be committed.

8.7.4.3 Upon successful modification, a message will appear on the screen suggesting the outcome.

8.7.4.4 Upon unsuccessful modification, an error or exception message will appear on the screen suggesting the outcome.

## 8.8 General settings

8.8.1 Configuring number of KSAs for an assessment is out of scope.

8.8.2 Invitation feature can be turn on/off through this section.

8.8.3 Dropdown for team size can be set through this section

### 8.8.1 Email notifications

8.8.1.1 Following events will trigger auto generated email notifications to the appropriate recipients:

- When a user gets registered – notify user and admin
- When a user resets password – notify user
- When a user changes password – notify user
- When a user initiates an assessment – notify admin and sales user
- When a user completes an assessment – notify user and sales user
- When an assessment not completed within 7 days – notify user and sales user

## 9. Reports

9.1 This section is not available for general users.

9.2 3 kinds of reports available:

- Tabular format – Examples are
  - Total number of KSAs covered
  - % of KSAs covered in each domain
  - % of KSAs covered in each competency area
  - % of KSAs assessed for each rating scale
  - Total time taken
- Chart format – Examples are
  - A pie chart showing % of KSAs covered in each domain
  - A pie chart showing % of KSAs covered in each competency area
  - A line chart showing in %, total number of KSAs covered by each rating scale
- Detail format – Examples are
  - This format showing all KSAs and the selected rating scales for each KSAs for selected assessment for selected general user.

- Based on the selected rating scales, admin person will be able to see suggested courses for the user
- Assessments started but not completed, regardless of when it started.



## Assumptions

Following assumptions have been considered while generating this estimation:

- ✓ As and when needed, all software and/or hardware licenses suggested by OpenEyes Technologies will be purchased by AFP.
- ✓ As and when needed, all copyrighted images and/or icons and/or pictures and/or Audio and/or Video and/or any media files suggested by OpenEyes Technologies will be purchased by AFP
- ✓ The cost of hosting is not part of this estimation considering it will be on AFP's servers.
- ✓ PHP, MySQL and few Open-Source Libraries will be the basic technology stack.
- ✓ Post-delivery, 60 days of free technical support will be provided by OpenEyes. During these days, support only offered for the delivered items. Any new development or out-of-scope items will be billed separately based on additional work order(s).
- ✓ Invoicing will be every 15 days, twice a month. Payment terms will be of net 30 days.
- ✓ This cost includes documentations like requirement gathering, technical document and a user guide.
- ✓ The cost of training is not included in this estimate.
- ✓ AFP will provide following information:
  - Instructions for each screen
  - Email addresses for test users when QA begins
  - Email address for help section
  - List of industries for a company

## Accountability Holders

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